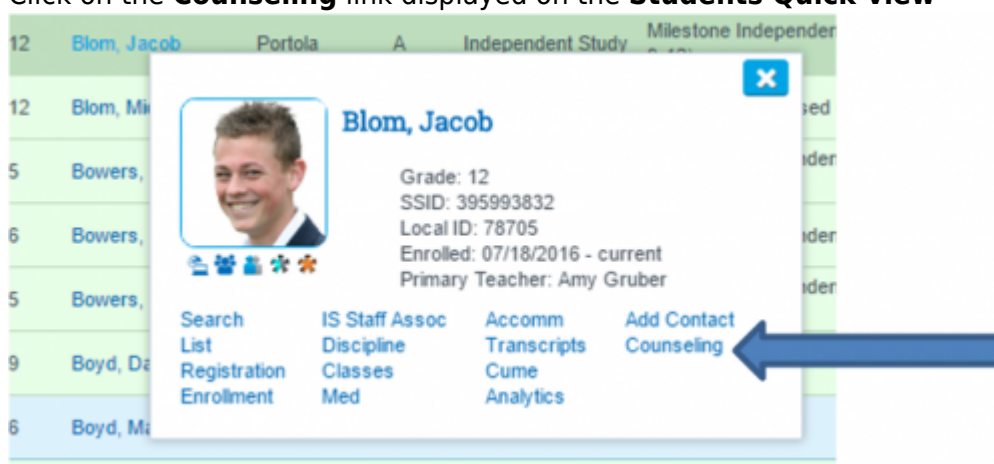student records, admin, webinar wednesday

Counselor Tab: Updated, Remodeled, Robust

2017-03-01_10.05_newly_remodeled_counselor_page.mp4

There are 2 ways to access the Counseling tab for a Student:

- Pathway: From the **Student Dashboard**, Click on **Special Programs/Accomm>Counseling**, or
- Click on the **Counseling** link displayed on the **Students Quick-view**

1. Granting Permission to the new Counselor Tab:

- Go to **Admin>Settings>Security>Security**
- Click on **Define Security Groups**
- Look for **Counselor Tab Permissions**
- Assign this permission groups to all relevant staff members

2. Setting up and customizing the Counselor Tab

The main customizable areas are as follows:

- **Domain**
- **Target Groups/Topics**
- **Services Provided**
- **Contact Method**

When you first enter the **Counselor** pages, you will only see choices populated in the **Domain** area.

To set up these areas, go to **Admin>Settings>Counseling Tab Settings**. Here is what you will see:

With any of these areas you can add and use **the titles of your choice**. The next screenshot is an example of choices a school may make...

An entry is added by clicking on **+Add**. After adding all the choices you desire in an area - click **SAVE**.

Things to know:

- You can change the order of the list by clicking on the 3 bars ☰ and doing a drag-and-drop.
- If you no longer want to use an item, just uncheck the box and the choice will turn gray and no longer be available.

3. Using the Counselor tab to record a Counseling Session.

After Setup, your Counselor tab will look something like this:

- You will record a Session on the left-hand side of the page
- The right-hand table provides a place to identify:
  - The Counselor and/or Psychologist assigned to a Student
  - Links to any Special programs, The AAPor Graduation Plan, A-G Student Page, CTE Student Page, and the Supervising Teacher's Dashboard.

The upper-portion of the Session Log provides details of what is discussed during the session...

The lower-portion of Session tracks

- The time spent in the session
- Notes any Previous Sessions
- Notes any Legacy Counseling Notes

4. Coming Soon:

- We will be adding a Notifications capability such as now exists in Contact Manager
- We will also be adding a Counseling Session Log Report that is comprehensive and can be filtered to display in several different ways.