

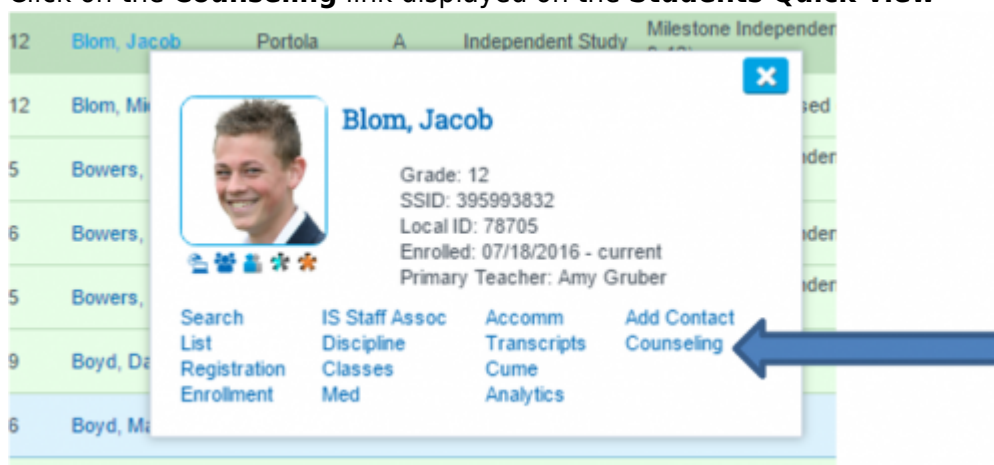
[student records](#), [admin](#), [webinar wednesday](#)

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

	Counselor (View Only)	private	staff	base	2 Members	Default Global Group
	Counselor Tab Permissions	private	staff	base	0 Members	Default Global Group
	Permission Character	private	staff	base	1 Member	Default Global Group

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.

Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input type="checkbox"/> Personal/Emotional
Target Groups/Topics/Other:	
Services Provided/Other:	
Session Topic	
Meeting Notes	
Contact Method	-- Choose --
* Date of Session	02/23/2017
* Start Time	1:16 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time	<input type="radio"/> AM <input type="radio"/> PM
Total Time	Minutes
* Session Confidentiality	<input type="checkbox"/> Share this Record (Display in Contact Manager) <input checked="" type="checkbox"/> Keep Confidential (Do not Share)
Related Document	<input type="button" value="Choose File"/> <input type="button" value="No file chosen"/>

Current Assigned Staff	
Counselor	Adale, Joe
Psychologist	-- Choose --
Student Information as of 02/23/2017	
School	Milestone Academy
Learning Center	Milestone Independent Study Program (Grades 9-12)
Student	Blom, Jacob
Special Programs	
Supervising Teacher	Gruber, Amy
Contact Specialist	Reeves, LeAnn (leann)
Related Resources	
Milestone Graduation Plan	
A-G Requirements	
CTE Pathways	

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

Counseling Session Log Settings

Domains

<input checked="" type="checkbox"/> 1 Academic
<input checked="" type="checkbox"/> 2 Career
<input checked="" type="checkbox"/> 3 Personal/Emotional

+ Add

Groups/Topics

+ Add

Services

+ Add

Contact Method

<input checked="" type="checkbox"/> 1 Face-to-Face with Student
<input checked="" type="checkbox"/> 2 Conversation with Parent
<input checked="" type="checkbox"/> 3 Phone visit with Student
<input checked="" type="checkbox"/> 4 Email to Student or Parent

+ Add

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...

Domains	Groups/Topics	Services	Contact Method
<input checked="" type="checkbox"/> 1 Academic	<input checked="" type="checkbox"/> 1 Senior Advising	<input checked="" type="checkbox"/> 1 Motivational	<input checked="" type="checkbox"/> 1 Face-to-Face with Student
<input checked="" type="checkbox"/> 2 Career	<input checked="" type="checkbox"/> 2 High School Goals	<input checked="" type="checkbox"/> 2 Crisis Career Assessment	<input checked="" type="checkbox"/> 2 Conversation with Parent
<input checked="" type="checkbox"/> 3 Personal/Emotional	<input checked="" type="checkbox"/> 3 Pregnant/Parent Youth	<input checked="" type="checkbox"/> 3 Academic Advising	<input checked="" type="checkbox"/> 3 Phone visit with Student
+ Add	<input checked="" type="checkbox"/> 4 Foster Youth	<input checked="" type="checkbox"/> 4 Shelter	<input checked="" type="checkbox"/> 4 Email to Student or Parent
Save	<input checked="" type="checkbox"/> 5 Homeless Youth	<input checked="" type="checkbox"/> 5 Military	<input checked="" type="checkbox"/> 5 Direct Contact
	<input checked="" type="checkbox"/> 6 19+	<input checked="" type="checkbox"/> 6 Vocational	<input checked="" type="checkbox"/> 6 Indirect phone, email, fax
	<input checked="" type="checkbox"/> 7 Re-enrolling/Re-instated	<input checked="" type="checkbox"/> 7 Mental Health Referral	+ Add
	<input checked="" type="checkbox"/> 8 Dual Enrollment	<input checked="" type="checkbox"/> 8 College/University	Save
	<input checked="" type="checkbox"/> 9 New students	<input checked="" type="checkbox"/> 9 Vocational Placement	
+ Add	Save	<input checked="" type="checkbox"/> 10 Credit Completion	
		<input checked="" type="checkbox"/> 11 Employment	
	+ Add	Save	

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.

<input checked="" type="checkbox"/> 8 Dual Enrollment	
<input checked="" type="checkbox"/> 9 New students	
<input type="checkbox"/> 10 High School Goals	
+ Add	Save

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

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

Counseling Session Log

Domain: ☐ Academic ☐ Career ☐ Personal/Emotional

Target Groups/Topics: ☐ Academic Goals ☐ 19+ ☐ Senior Advising ☐ Re-enrolling/Re-instated ☐ Pregnant/Parent Youth ☐ Dual Enrollment ☐ Foster Youth ☐ New students ☐ Homeless Youth Other:

Services Provided: ☐ Motivational ☐ Mental Health Referral ☐ Crisis Career Assessment ☐ College/University ☐ Academic Advising ☐ Vocational Placement ☐ Shelter ☐ Credit Completion ☐ Military ☐ Employment ☐ Vocational Other:

Session Topic:

Meeting Notes:

Contact Method:

Current Assigned Staff

Counselor:
Psychologist:
Student Information as of 02/23/2017
School:
Learning Center:
Student:
Special Programs:
Supervising Teacher:
Contact Specialist:
Related Resources
Milestone Graduation Plan
A-G Requirements
CTE Pathways

- 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...

(Session created by LeAnn Reeves on 02/23/2017 2:50pm)

Counseling Session Log

Domain: ☒ Academic ☐ Career ☐ Personal/Emotional

Target Groups/Topics: ☒ Academic Goals ☐ 19+ ☒ Senior Advising ☐ Re-enrolling/Re-instated ☐ Pregnant/Parent Youth ☐ Dual Enrollment ☐ Foster Youth ☐ New students ☐ Homeless Youth Other:

Services Provided: ☐ Motivational ☐ Mental Health Referral ☐ Crisis Career Assessment ☒ College/University ☐ Academic Advising ☐ Vocational Placement ☐ Shelter ☐ Credit Completion ☐ Military ☐ Employment ☐ Vocational Other:

Session Topic:

Meeting Notes:

Jacob is looking at several different college options so we met to talk over the requirements for each. Jacob will be eligible for the golden state merit award and also for a cal grant award. He will be taking advantage of both.

Current Assigned Staff

Counselor:
Psychologist:
Student Information as of 02/23/2017
School:
Learning Center:
Student:
Special Programs:
Supervising Teacher:
Contact Specialist:
Related Resources
Milestone Graduation Plan
A-G Requirements
CTE Pathways

The lower-portion of Session tracks

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

Contact Method	Face-to-Face with Student *
* Date of Session	02/23/2017
* Start Time	2:37 AM PM
End Time	3:25 AM PM
Total Time	48 Minutes
* Session Confidentiality	<input type="radio"/> Share this Record (Display in Contact Manager) <input checked="" type="radio"/> Keep Confidential (Do not Share)
Related Document	<input type="button" value="Choose File"/> No file chosen

Previous Sessions ▶

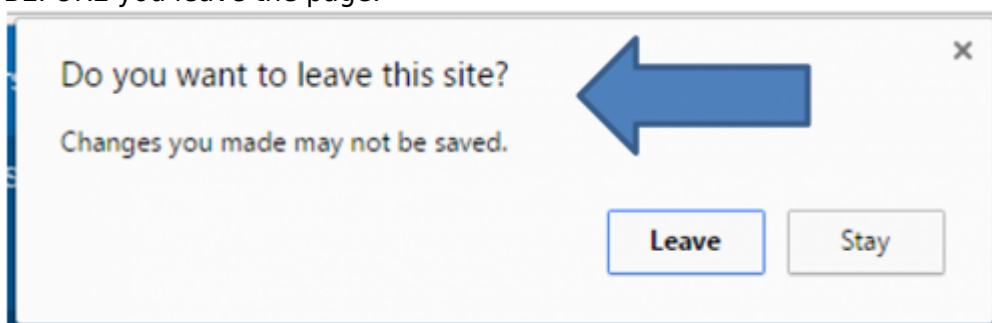
Legacy Counseling Notes ▶

Supervising Teacher	Gruber, Amy
Contact Specialist	Reeves, LeAnn (leann)
Related Resources	
Milestone Graduation Plan	
A-G Requirements	
CTE Pathways	

4. Options for Saving a Session

There are **various options and warnings available** when it comes to SAVING a session.

- If you try to leave the page and forget to SAVE, you will be warned to save your changes BEFORE you leave the page:



- If you are working on several sessions at once and want to **temporarily SAVE** what you have done in the session so far, click SAVE. ***This will keep the session open for further input.***

RT2	504	SPEDES	EL	Counseling	Work Permits
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☒ Session Saved.

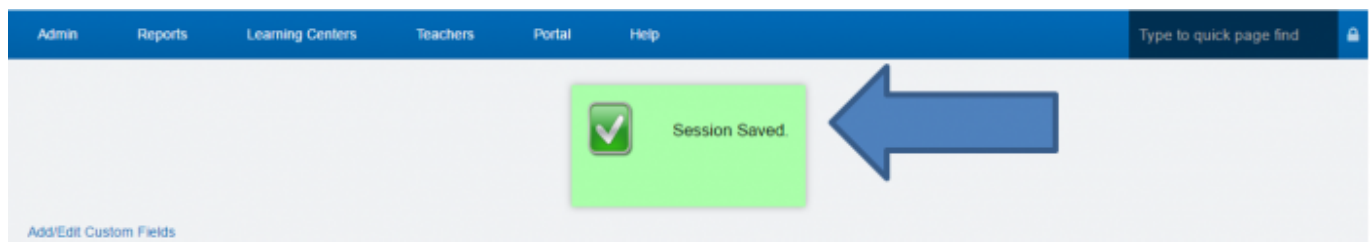
(Last modified by LeAnn Reeves on 03/15/2017 10:37am)
(Session created by LeAnn Reeves on 03/15/2017 10:37am)

Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input checked="" type="checkbox"/> Personal/Emotional
Target Groups/Topics	<input type="checkbox"/> Academic Goals <input type="checkbox"/> Senior Advising <input type="checkbox"/> Pregnant/Parent Youth <input type="checkbox"/> Foster Youth <input type="checkbox"/> Homeless Youth <input type="checkbox"/> Other: Recent divorce of parents <input type="checkbox"/> Motivational <input type="checkbox"/> Crisis Career Assessment <input type="checkbox"/> 19+ <input type="checkbox"/> Re-enrolling/Re-Instated <input type="checkbox"/> Dual Enrollment <input type="checkbox"/> New students <input type="checkbox"/> Mental Health Referral <input type="checkbox"/> Criminal/Intervent

Current Assigned Staff	
Counselor	Brenneman, Kathleen
Psychologist	Ward, Amanda
Student Information as of 03/15/2017	
School	Milestone Academy
Learning Center	Milestone Independent Study Program (Grades Tk-8)
Student	Abney, John
Special Programs	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Supervising Teacher	Brenneman, Kathleen
Contact Specialist	Reeves, LeAnn (leann)
Related Resources	
Milestone 4 Year Graduation Worksheet	
A-G Requirements	
CTE Pathways	

- Once you are satisfied with your session and want to save the entire session, click

SAVE AND FINISH. This fully saves the session and moves you to a blank save page. The session is now moved to the **Previous Session area** of the Counseling Tab.



5. 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 and several different ways. This report will **default to the Current Student. Filters can be adjusted** so you will be able to see many different versions of this report.

From:
<https://schoolpathways.com/knowledgebase/> - School Pathways Knowledge Base

Permanent link:
https://schoolpathways.com/knowledgebase/doku.php?id=products:admin:registration:counseling_session&rev=1489600562

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