

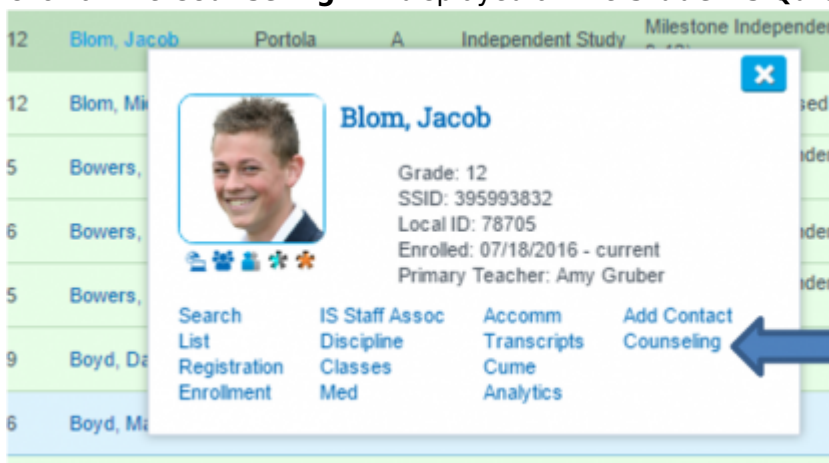
[student records](#), [admin](#), [webinar wednesday](#)

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
	Personnel Charitable	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: <input type="text"/>
Services Provided	Other: <input type="text"/>
Session Topic	<input type="text"/>
Meeting Notes	<div style="border: 1px solid #ccc; height: 100px;"></div>
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="text"/> <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	Biom, Jacob
Special Programs	
Supervising Teacher	Gruber, Amy
Contact Specialist	Reeves, LeAnn (learn)
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

- 1 Academic
- 2 Career
- 3 Personal/Emotional

+ Add

Groups/Topics

+ Add

Services

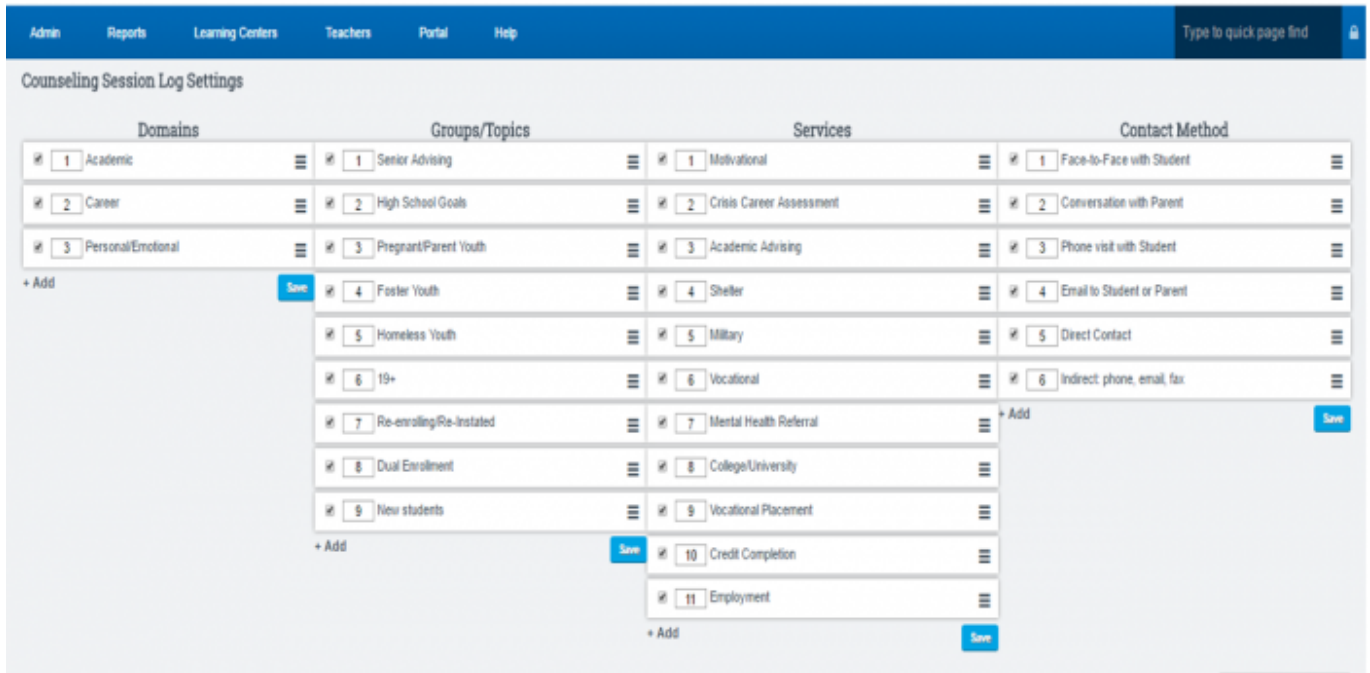
+ Add

Contact Method

- 1 Face-to-Face with Student
- 2 Conversation with Parent
- 3 Phone visit with Student
- 4 Email to Student or Parent


+ Add

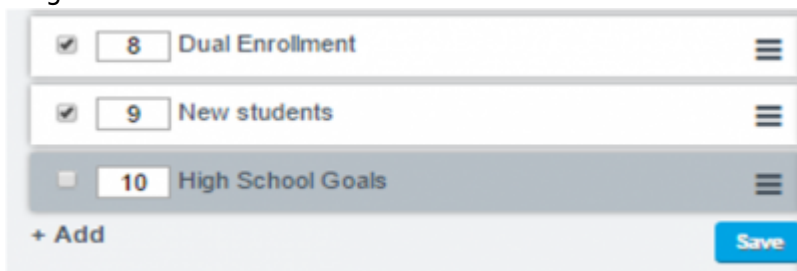
With any of these areas you can add and use **the titles of your choice**. The next screenshot is an example of choices a school may make...



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

Contact Method	Face-to-Face with Student
Date of Session	02/23/2017
Start Time	2:37 AM
End Time	3:25 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	Choose File No file chosen

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

Save Save and Finish Cancel

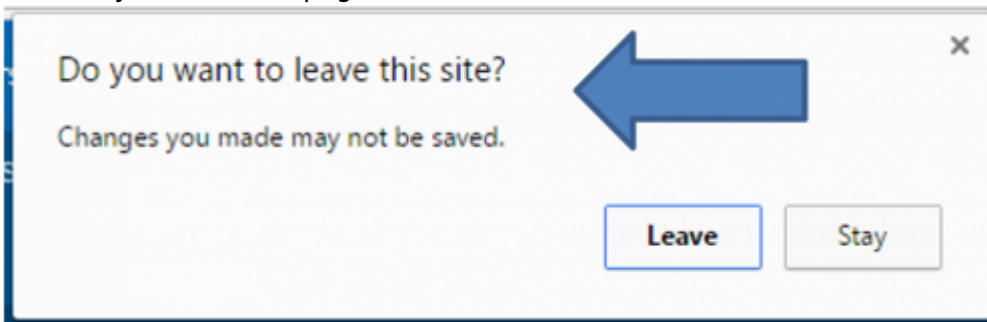
Previous Sessions

Legacy Counseling Notes

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.**

RTD 504 SPED/SES EL Counseling Work Permits

Session Saved

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

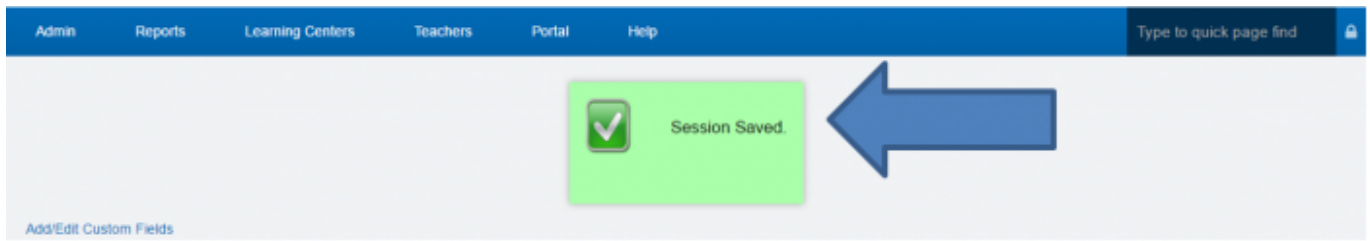
Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input checked="" type="checkbox"/> Personal/Emotional
Target Groups/Topics	<input type="checkbox"/> Academic Goals <input type="checkbox"/> Senior Advising <input type="checkbox"/> Pregnant/Parent Youth <input type="checkbox"/> Foster Youth <input type="checkbox"/> Homeless Youth Other: <input type="text" value="Recent divorce of parents"/>

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	* * * * * * *
Supervising Teacher	Brenneman, Kathleen
Contact Specialist	Reeves, LeAnn (leann)
Related Resources	
Milestone 4 Year Graduation Worksheet	
A-G Requirements	
CTE Pathways	

Save Save and Finish Cancel

- 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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