student records, admin, webinar wednesday, video

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

5 Bowers, 6 Bowers, Carade: 12 SSID: 395993832 Local ID: 78705 Enrolled: 07/18/2016 - current	12	Blom, Jaco	b Portola	A A	Independent Stud	dy Milestone Indep	pender
5 Bowers, 6 Bowers, 5 Bowers, 5 Bowers, 5 Bowers, 9 Boyd, Da Search IS Staff Assoc List Discipline Transcripts Counseling Counseling Counseling	12	Blom, Mir		Blom, J	acob	×	sed
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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

0	Ocunselor (Vew Only)	private	staff	base	2 Members	Default Global Group
0	Ocurselor Tab Permissions	private	staff	base	0 Members	Default Global Group
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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.

RT12 504 SPEDSEIS EL Counseling Work Premits	
	Current Assigned Staff
	Counselor Adale, Joe
Counseling Session Log	Psychologist Choose *
overlating overlating	Student Information as of 02/23/2017
Academic	School Miestone Academy
Domain Career	Learning Center Milestone Independent Study Program (Grades 9-12)
PersonalEmotional	Student Biori, Jacob
Target Groups/TopicsOther.	Special Programs 🗱 🚖
Services Provided Other:	Supervising Teacher Gruber, Amy
Session Topic	Contact Specialist:Reeves, LeAnn (leann)
	Related Resources
	Milestone Graduation Plan
	A-G Requirements
	CTE Pathways
Meeting Notes	
Contact Method Choose •	
* Date of Session 02/23/2017	
* Start Time 1:16 O AM ® PM	
End Time 0 AM 0 PM	
Total Time Minutes	
* Session Confidentiality Stare this Record (Display in Contact Manager) Keep Confidential (Do not Share)	
Related Document Choose File No Stechosen	Save Save and Finish Cancel

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

Counseling Session Log Settings					
Domains		Groups/Topics	_	Services	es Contact Method
R 1 Academic	+ Add		Save + Add		See 8 1 Face-to-Face with Student
₿ 2 Career					Conversation with Parent
PersonalEmotional					3 Phone visit with Student
+ Add					Email to Student or Parent
					+ Add Sm

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...

nin Reports Learnin;	g Centers	Teachers Portal	Help				Type to quick page find
inseling Session Log Setting	js						
Domains		Group	s/Topics	Services	1	Contact 1	Method
1 Academic	≡	8 1 Senior Advising	=	8 1 Motivational	=	Face-to-Face with Stude	nt
2 Career	≡	🛙 🔁 High School Goals	=	2 Crisis Career Assessment	=	2 Conversation with Parent	· · · · ·
3 Personal/Emotional	=	S Pregnant/Parent Yo	uth 🔳	Academic Advising	Ξ	B 3 Phone visit with Student	1
ld	Sive	4 Foster Youth	=	2 4 Sheller	=	4 Email to Student or Parer	nt i
		8 5 Homeless Youth	=	8 5 Millary	=	8 5 Direct Contact	
		R 6 19+	=	R 6 Vocational	=	8 6 Indirect phone, email, fai	x.
		8 7 Re-enrolling Re-Ins	tated	2 7 Mental Health Referral	=	+ Add	-
		8 B Dual Enrolment	=	College/University	=		
		8 9 New students	=	9 Vocational Placement	=		
	+	Add	Sive	8 10 Credit Completion	=		
				8 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 \equiv 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:

update: 2017/04/19 products:admin:registration:counseling_session https://schoolpathways.com/knowledgebase/doku.php?id=products:admin:registration:counseling_session&rev=1492616065 15:34

Search List Registration Error	diment Support Staff IS Staff Assoc Discipline Classes Med Special Pognams/Accomm TOMS Sport	vts/Clubs Tests Transcripts Curre Profile Dashboard
RT12 504 SPED/SEIS EL	Courseling Work Permits	
	Counseling Session Log	Courseior Adale, Joe • Psychologist Choose •
Domain	Career Personal Emotional	Student Information as of 02/23/2017 School Milestone Academy
Target Groups/Topics	Academic Goals IP+ Re-enroling/Re-Instated Re-enroling/Re-Instated	Learning Center Milestone Independent Study Program (Grades 9-12) Student; Blom, Jacob Special Programs & S Supervising Teacher Orsber, Amy Contact Specialist; Revers, LeAnn (earn) Related Resources
Services Provided	Montadonal Montal Health Referral Crisis Career Assessment College/University Academic Advising Vocational Recentent Cirelit Completion Millary Employment Other	Milentone Graduation Plan A.G. Requirements CTE Pathways
Session Topic		
Meeting Noter		
Contact Method	d Choose •	Size Size and Finish Canon

- 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...

NTI2 504 SPECASEIS EL	Consulty Work Permits
Session created by LeAnn Reeves on 0	23/2017.2.58pm) Current Assigned Staff
	Counseling Session Log Counseling Session Log Counseling Session Log Counseling Session Log Choose - Counseling Session Log Student Information as of 02(2)/2017
Domain	Academic School/Miestone Academy Career Learning Center/Miestone Independent Study Program (Gra Personaltendonal Student filter, Jacob
Target Groups/Topic	Academic Goals Special Programs Pearoling/Re-Instated Special Programs Second Programs Pearoling/Re-Instated Supervising Teacher Grubber, Any Pregram/Parent Youth Dual Envolment Contact Speciality Revers, LeAnn (learn) Related Resources Missione Graduation Plan
Services Provide	Mdrta/stonal Mental Haath Reformal A-G Requirements Crisis Cologe/Univ restly Cologe/Univ restly Sabetri Credit Completion Sabetri Credit Completion Watary Encloyed Vocational Matrix User Credit Completion
Session Topi	College Planning
Meeting Note	Jacob is looking at several different college options so we net to talk over the requirements for each. Jacob will be eligible for the doller State Herit Award and also for a Cal drant award. He will be taking advantage of both.

The lower-portion of Session tracks

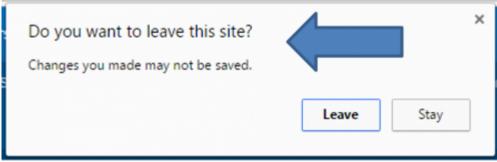
- The time spent in the session
- Notes any Previous Sessions
- Notes any Legacy Counseling Notes

2025/07/08 20:20	5/6	Counselor Tab: Updated, Remodeled, Robus
	7 AM ® PM 0 AM ® PM Minutes this Record (Display in Contact Manager) Confidential (Do not Share)	Supervising Teacher Gruber, Any Contact Specialist Reeves, LeArn (learn) Related Resources Milestone Graduation Plan A-G Requirements CTE Pathways
Legacy Counseling Notes		

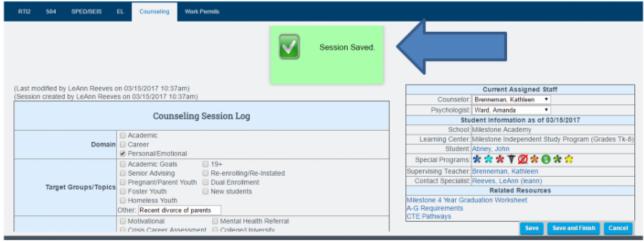
4. Options for Saving a Session

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:

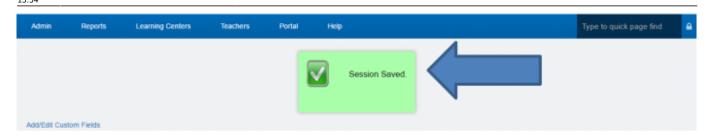


• If you are working on several sessions at once and want to **temporarily SAVE** what you have done in the session so far, click SAVE. *This will keep the session open for further input.*



• 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=1492616065

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