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



### 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

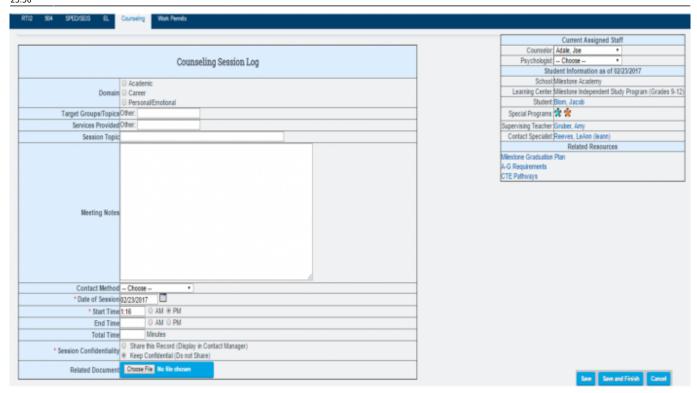


### 2. Setting up and customizing the Counselor Tab

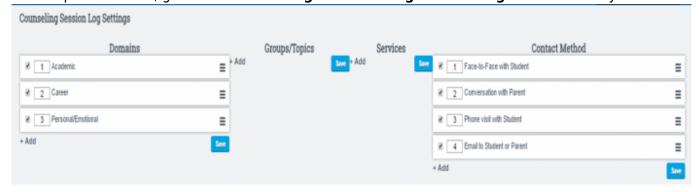
The main customizable areas are as follows:

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

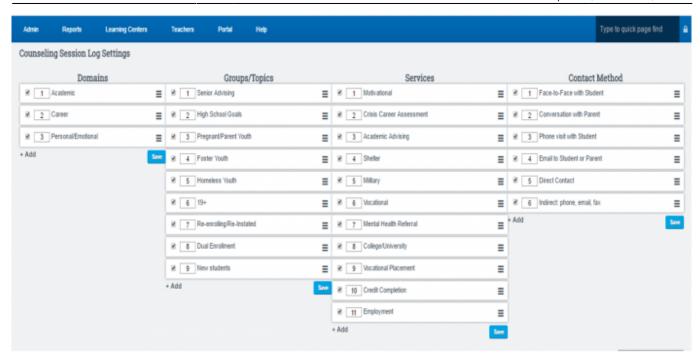
When you first enter the **Counselor** pages, you will only see choices populated in the **Domain** area.



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



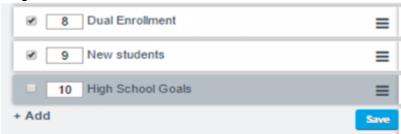
With any of these areas you can add and use **the titles of your choice**. The next screenshot is an example of choices a school may make...



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

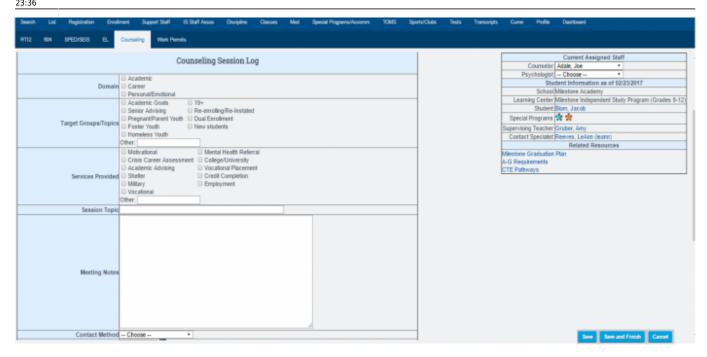
#### Things to know:

- 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.



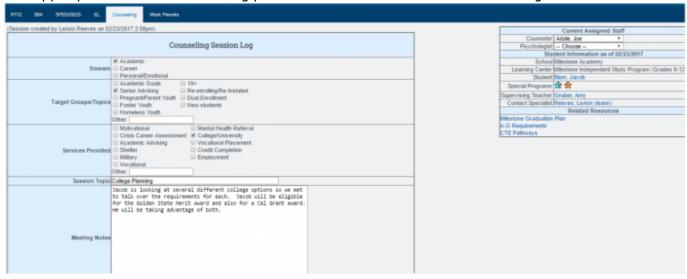
# 3. Using the Counselor tab to record a Counseling Session.

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

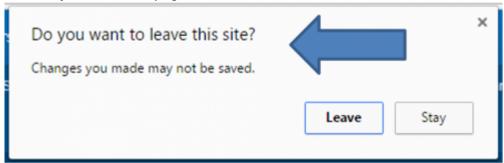
- The time spent in the session
- Notes any Previous Sessions
- Notes any Legacy Counseling Notes



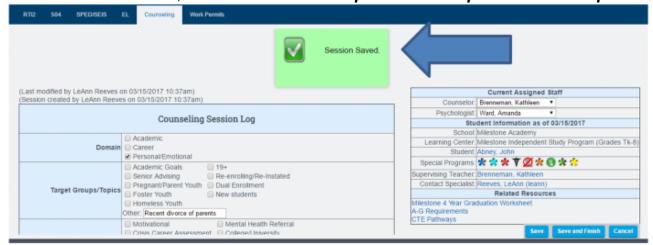
### 4. Options for Saving a Session

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.

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