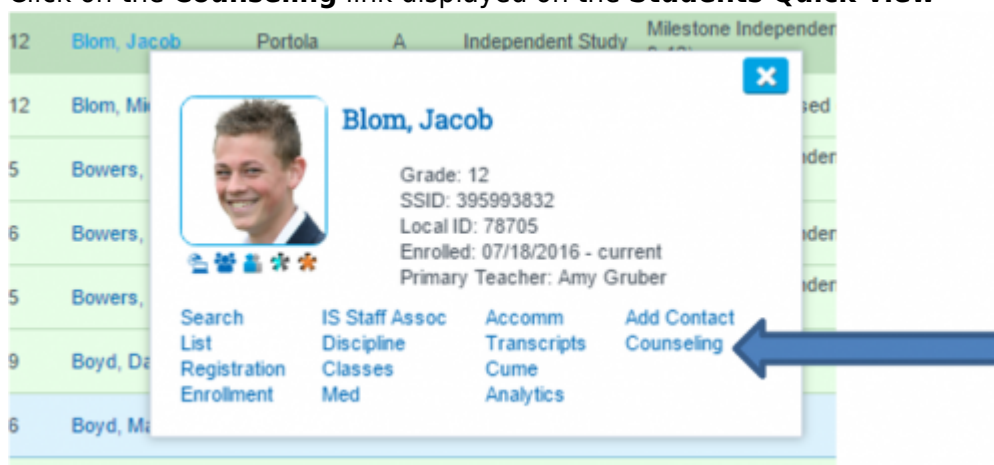student records, admin, webinar wednesday, video

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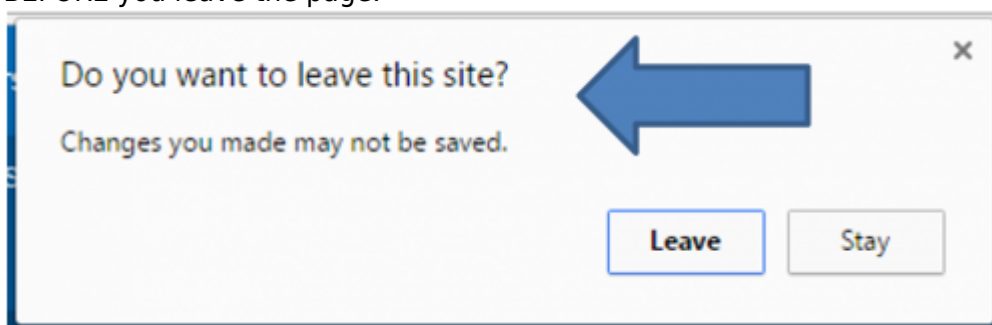
- If you are working on several sessions at once and want to **temporarily SAVE** what you have done in the session so far, click SAVE. *This will keep the session open for further input.*

- 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.
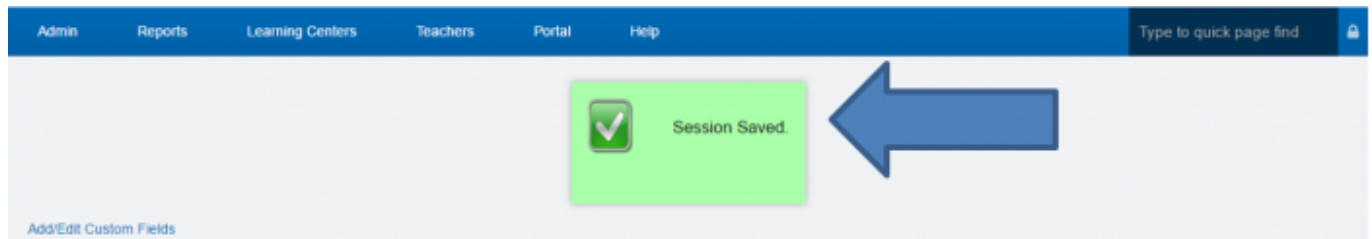
5. Coming Soon:

- 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.