

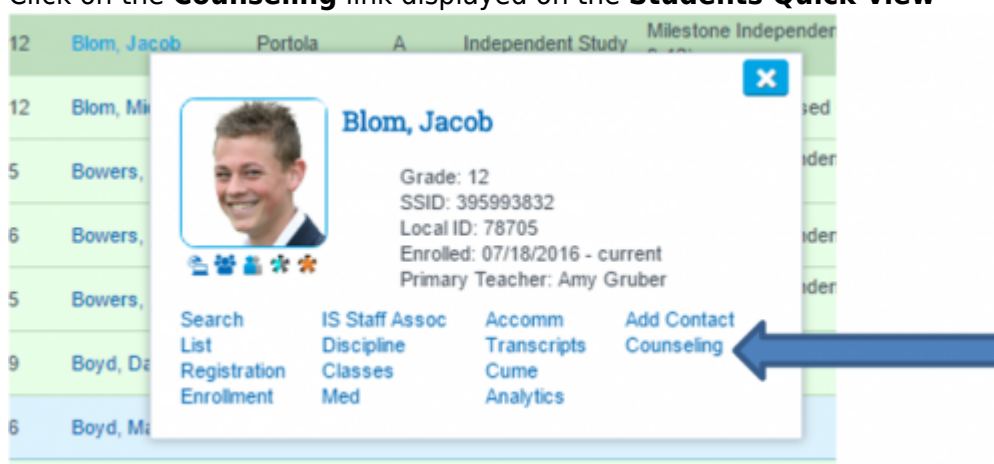
[student records](#), [admin](#), [webinar wednesday](#), [video](#)

# 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

Counselor (View Only)	private	staff	base	2 Members	Default Global Group
Counselor Tab Permissions	private	staff	base	0 Members	Default Global Group
Permission Characteristic	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="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

**Current Assigned Staff**

Counselor	Adair, 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 (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	+ Add
<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	+ Add
<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...

Counseling Session Log Settings

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.

☒ 8 Dual Enrollment  
☒ 9 New students  
☐ 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:

The screenshot shows the 'Counseling Session Log' form. The left-hand side contains several sections for session details:

- 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:** A text input field.
- Meeting Notes:** A large text area for notes.
- Contact Method:** A dropdown menu.

The right-hand side contains a table for 'Current Assigned Staff' and a section for 'Student Information as of 02/23/2017'.

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

At the bottom right, there are buttons for 'Save', 'Save and Finish', and 'Cancel'.

- 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...

This screenshot shows the same 'Counseling Session Log' form, but with a completed session. The 'Session Topic' is filled with 'College Planning'. The 'Meeting Notes' section contains the following text:

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.

The right-hand side of the form is identical to the previous screenshot, showing the 'Current Assigned Staff' and 'Student Information'.

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 ▶

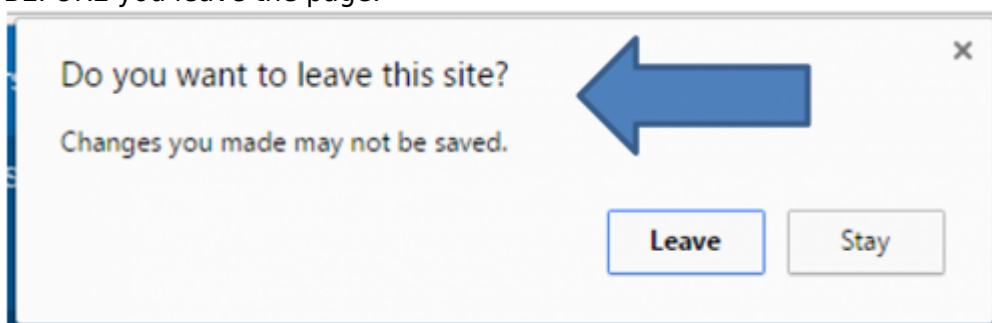
Legacy Counseling Notes ▶

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.***

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)

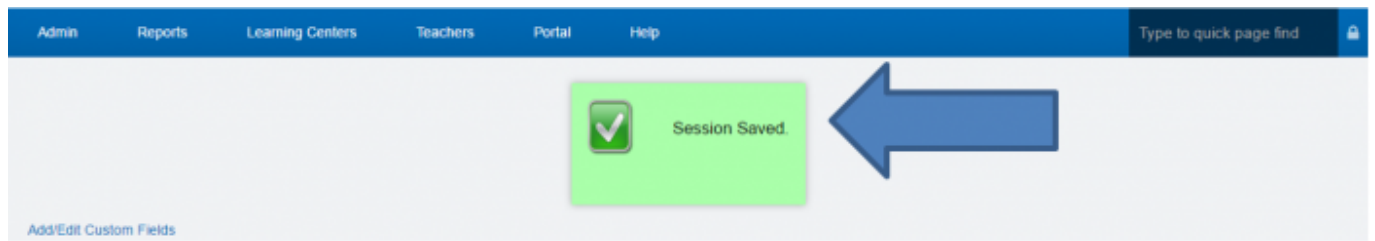
Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input checked="" type="checkbox"/> Personal/Emotional
Target Groups/Topics	<input type="checkbox"/> Academic Goals <input type="checkbox"/> Senior Advising <input type="checkbox"/> Pregnant/Parent Youth <input type="checkbox"/> Foster Youth <input type="checkbox"/> Homeless Youth <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.

Last update: 2019/08/05 15:40 products:admin:registration:counseling\_session https://schoolpathways.com/knowledgebase/doku.php?id=products:admin:registration:counseling\_session



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

Permanent link:  
[https://schoolpathways.com/knowledgebase/doku.php?id=products:admin:registration:counseling\\_session](https://schoolpathways.com/knowledgebase/doku.php?id=products:admin:registration:counseling_session)

Last update: **2019/08/05 15:40**