

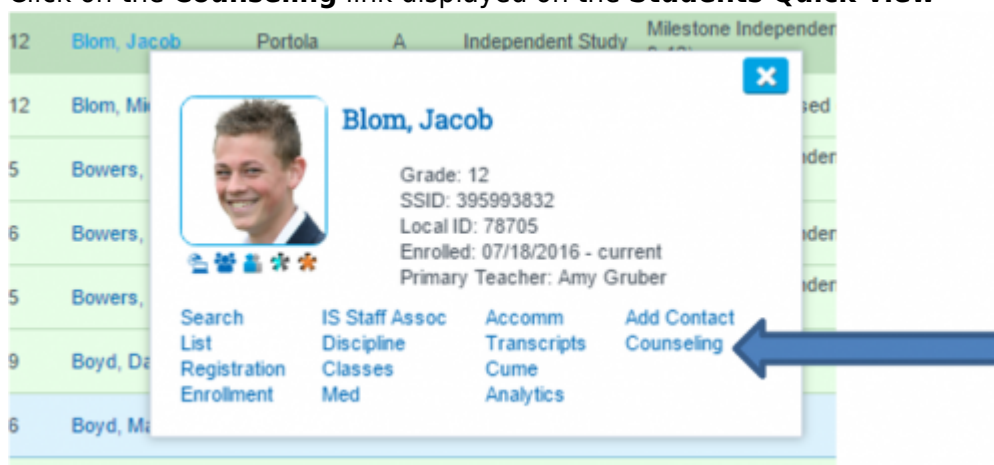
[student records](#), [admin](#), [webinar wednesday](#), [video](#)

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 Character	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	Choose File 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 (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...

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.

<input checked="" type="checkbox"/> 8 Dual Enrollment	
<input checked="" type="checkbox"/> 9 New students	
<input type="checkbox"/> 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:

- 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 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 ▶

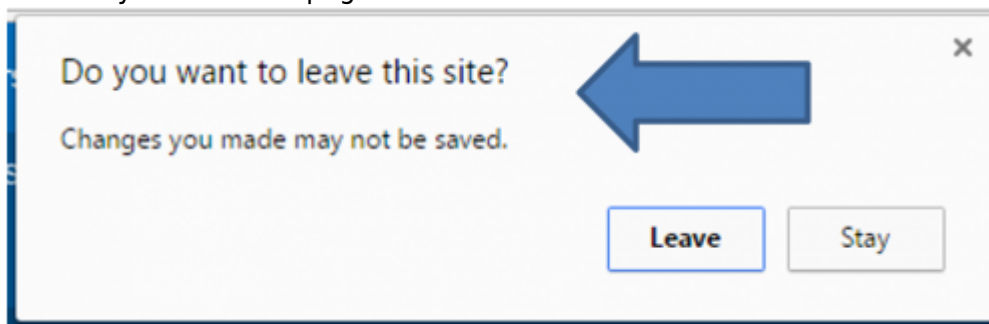
Legacy Counseling Notes ▶

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.***

RT2	504	SPEDES	EL	Counseling	Work Permits
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☒ Session Saved.

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

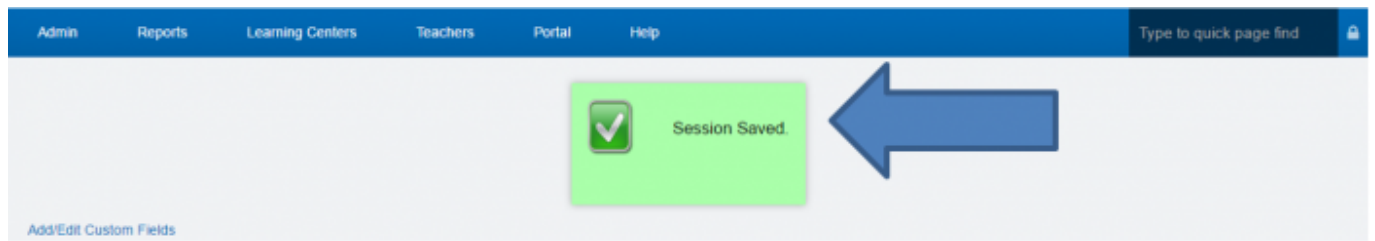
Counseling Session Log	
Domain	<input type="checkbox"/> Academic <input type="checkbox"/> Career <input checked="" type="checkbox"/> Personal/Emotional
Target Groups/Topics	<input type="checkbox"/> Academic Goals <input type="checkbox"/> Senior Advising <input type="checkbox"/> Pregnant/Parent Youth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



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