

# InformationNOW – Counseling Sessions

---

## About this Guide

This Quick Reference Guide provides an overview of the options available for tracking student counseling sessions in *InformationNOW*.

---

## Setup

Prior to entering student counseling session, the following *lookups* should be created. For more details regarding adding, viewing or deleting lookups, please refer to the *InformationNOW – Lookups* Quick Reference Guide.

### Session Type

The *session type* indicates the nature or subject of the meeting (ex.: *Parent Meeting, College Prep*). To create session types, go to **System Preferences | Setup**. Select **Session Types** from the list and click **Refresh**. Click to **Add** a new record. Required fields are indicated with an asterisk (\*).

The screenshot shows a web form titled "Add Session Type". It contains the following fields and controls:

- \*Name:** Text input field containing "College Prep".
- Description:** Text input field containing "College Prep Counseling Session".
- \*Code:** Text input field containing "CP".
- State Code:** Text input field.
- SIF Code:** Text input field.
- NCES Number:** Text input field.
- Active**
- Create** button
- Cancel** button

### Referral Type

The *referral type* indicates the means by which the student was referred for the counseling session (ex. *Parental Request, Student Request*). To create referral types, go to **System Preferences | Setup**. Select **Referral Types** from the list and click **Refresh**. Click to **Add** a new record. Required fields are indicated with an asterisk (\*).

## Outcome

The *outcome* is the end result of the session (ex. *Completed, Outside Referral*). To create outcomes, go to **System Preferences | Setup**. Select **Outcome** from the list and click **Refresh**. Click to **Add** a new record. Required fields are indicated with an asterisk (\*).

## Entering Counseling Sessions

To enter student counseling sessions, go to **Students | Student Maintenance**. Search for and select to **View** a student. Click the **Counseling** link under the *Manage* menu at left.

- The current *School Context* and *Academic Session* are selected. Users may select a different school context and/or academic session and click **Refresh** to view additional records.

- Click **Add** to insert a new counseling session record. Required fields are indicated with an asterisk (\*).

**Add Counseling Session for 1234512345123 - Adams, Amy Marie**

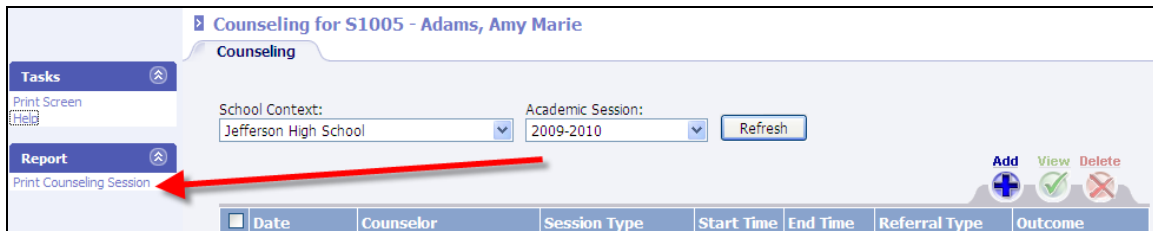
**Counseling Session**

<b>Student Information</b>		<b>Public Note</b>
Student Number: <b>S1001</b>	Student Name: <b>Adams, Amy Marie</b>	
Homeroom: <b>11a</b>	Grade: <b>11</b> Gender: <b>F</b>	
<b>Session Information</b>		
*School: <b>Hometown High School</b>	*Academic Session: <b>2009-2010</b>	
Session:		
*Counselor: <input type="text"/> <a href="#">Find</a>	*Session Type: <input type="text"/>	
*Date: <input type="text"/> <input type="button" value="..."/>	Start Time: <input type="text"/>	
	End Time: <input type="text"/>	
<b>Referral</b>		<b>Private Note</b>
Referral Type: <input type="text"/>	Referral Date: <input type="text"/> <input type="button" value="..."/>	
Referred By: <input type="text"/> <a href="#">Find</a>		
<b>Outcome</b>		
Outcome: <input type="text"/>		
		<input type="button" value="Create"/> <input type="button" value="Cancel"/>

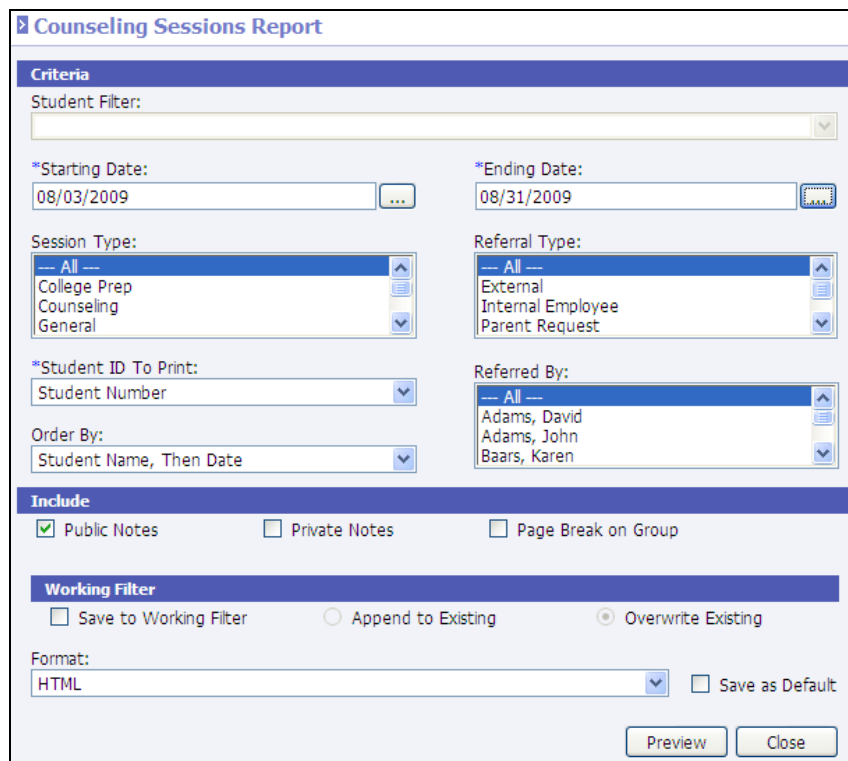
- **\*Counselor:** Defaults to the current logged-in user. Click **Find** to select a different counselor.
- **\*Session Type:** Select the reason for the session (ex. *Parent Meeting, College Prep, General Counseling*).
- **\*Date:** Today's date will be selected by default. Enter a different date or click the ellipsis button to select the date from a calendar view.
- **Start/End Time:** Enter the start and/or end time for the session.
- **Referral Type:** Select the means by which the student was referred (ex. *Parental Request, Student Request*).
- **Referral Date:** Enter the date on which the student was referred for the session.
- **Referred By:** Click **Find** to locate the person who referred the student.
- **Outcome:** Select the end result of the session (ex. *Completed, Outside Referral*).
- **Public/Private Notes:** Enter applicable notes. Each note field allows for 500 characters each. *Public* notes may be viewed or printed for any users with appropriate rights. *Private* notes are only viewable or printable for the person who entered the record.

# Counseling Session Report

The Counseling Sessions report is available for an individual student from the student's Counseling Screen via the **Print Counseling Session** option under the **Report** menu on the left.



The report is also available under **Students | Reports** or **Reports | All Reports**.



- **Student Filter:** If printing from the **Students | Reports** or **Reports | All Reports** menus, select the filter of students for which to print. If no filter is selected, all students will be included.
- **\*Starting/Ending Date:** Enter the starting/ending dates of the session(s) to be included.
- **Session Type:** Select the session type(s) to be included. Use *Ctrl*+click or *Shift*+click to select multiple types, or select **--- All ---**.
- **Referral Type:** Select the referral type(s) to be included. Use *Ctrl*+click or *Shift*+click to select multiple types, or select **--- All ---**.
- **Student ID To Print:** Select to print *None*, *Student Number*, *State ID Number*, *Alternate Student Number* or *Social Security Number*.
- **Order By:** Select to order the report by *Student Name*, *Counselor Name* or *Session Type*.

- **Referred By:** Select the referred by detail to include. Use *Ctrl*+click or *Shift*+click to select multiple types, or select --- **All** ---.
- **Include:** Check to include *Public Notes*, *Private Notes* and whether or not to insert a page break based on the *Order By* group selected.