Counseling Team Members

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Classic Path: Student Information > Counseling > General > Team Members

Search Terms: Counseling Team Members

The Team Members tool lists the individuals who are part of a student's education team, including counselors, family and service providers. The Role assigned to team members indicates their involvement in the student's team. Members can be added through finding an existing person and linking them or by entering a person without consulting Census.

In order for a staff member's name to appear in the student header with the Counselor designation, the staff member must have at least an email address or phone number entered on their Demographics tab. See the Demographics tool document for information on entering personal contact information.

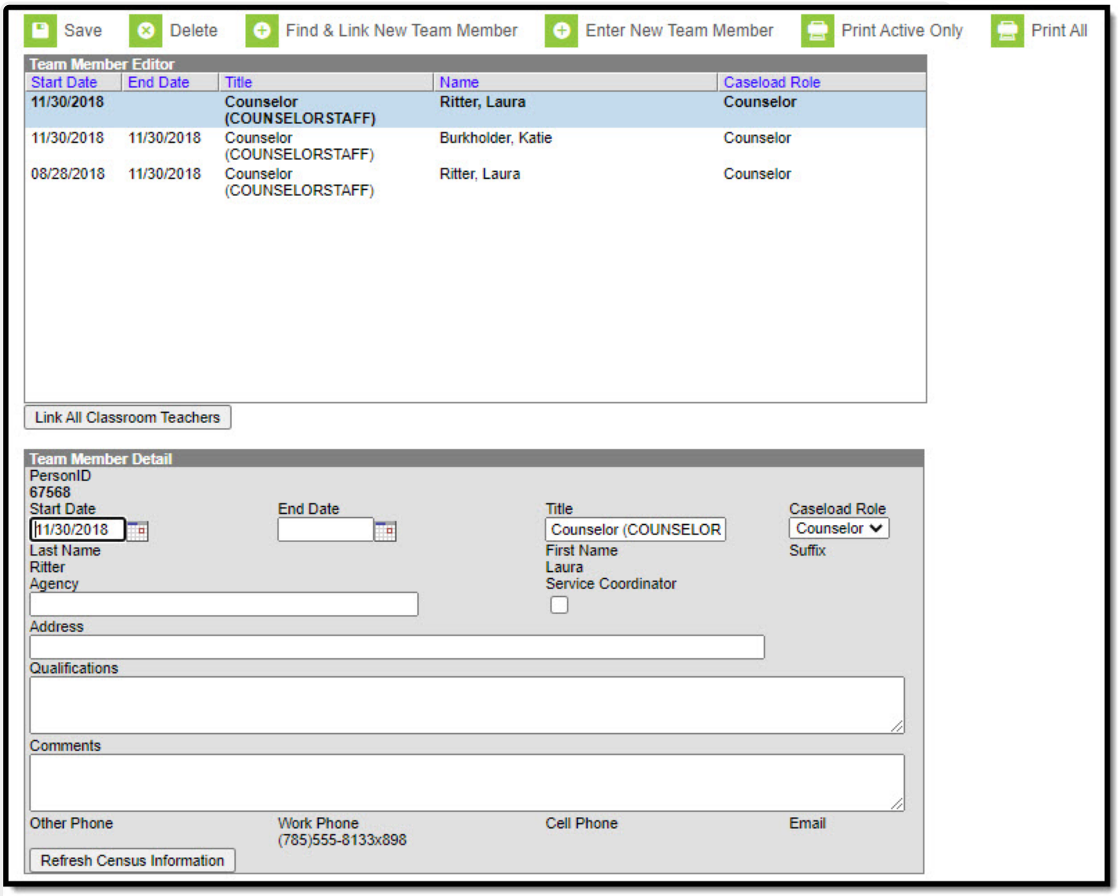

Image 1: Counseling Team Members

Only those individuals who need access to the student in a counseling context should be added.

For an explanation of the fields that appear for a team member, see the Team Member Fields table below.

Team Member Information in Ad hoc Query Wizard

Use the Student Data Type in the Filter Designer to build reports that include Team Members information. These fields are available in the **Student > Learner Planning > Team Members** folder.

Find and Link Team Members

The **Find and Link New Team Members** tool allows user to select new team members from a limited list based on likely candidates, such as those connected to the student in Census, the student's teachers, and staff members designated as Counselors. Existing individuals are then linked to the student and their information provided. See the following table for a description of the fields in this editor.

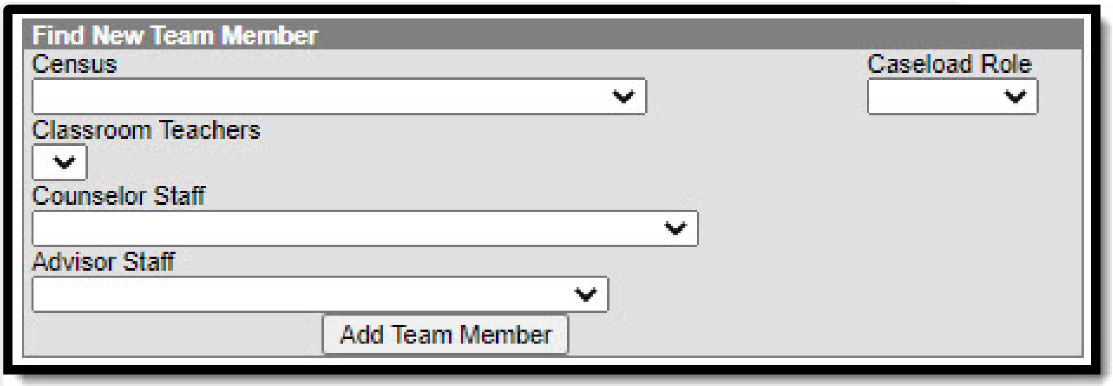

Image 2: Find and Link New Team Member

One new team member can be added at a time. For example, if a selection is made in the Census dropdown, no other selections can be made.

Find New Team Member Fields

Field	Description
Census	This dropdown list is made up of individuals who have a connection of the student though Census, such as members of the student's household, other guardians and emergency contacts. Individuals are listed with their Name (last, first), their status as a guardian of the student (Guard/Non-guard) and their relationship with the student (Mother, Father, etc).

Field	Description
Caseload Role	The Caseload Role field describes the team member's involvement in the student's counseling team. Roles are not linked to tool rights. The Role of **Counselor** places the student on the user's Counseling Caseload.
Classroom Teachers	This field pulls a list of the student's current teachers, based on the the student's schedule.
Counselor	This field includes staff members who have a District Assignment of **Counselor**. Individuals are listed with their Name (last, first) and Title.
Advisor Staff	This field includes staff members who have a District Assignment of **Advisor**.

Once the desired individual is selected, click **Add Team Member** to add the individual to the student's special education team. Contact information will populate from Census and the Start Date of the team membership will default to the current date. For an explanation of the fields that appear for a team member, see the Team Member Fields table below.

Add Team Members with the Find and Link New Team Member Tool

1. Select the **Find and Link New Team Member** button. The **Find New Team Member** editor displays.
2. Select the desired individual from the appropriate dropdown list.
3. Assign that individual a **Caseload Role**.
4. Click the **Add Team Member** button. The person will display in the **Team Member Editor**.

Selecting the newly added individual will display that person's team member detail, noting when the individual was added as a team member to that student, the assigned role, specific qualifications or comments. Certain information in this record is pulled from saved Census data. Use the **Refresh Census Information** button to pull updated information from the Identities tab. Edits can be made to this detail record to add qualifications and comments and to designate the Agency of the team member or to mark them as the Service Coordinator.

Enter New Team Members

Individuals who are not yet entered into Census or who do not have a District Assignment record can be added to a student's team by entering information about the team member. Team Members added in this way only exist as a record for this student; they are not added to Census and are not available to add to any other student's teams.

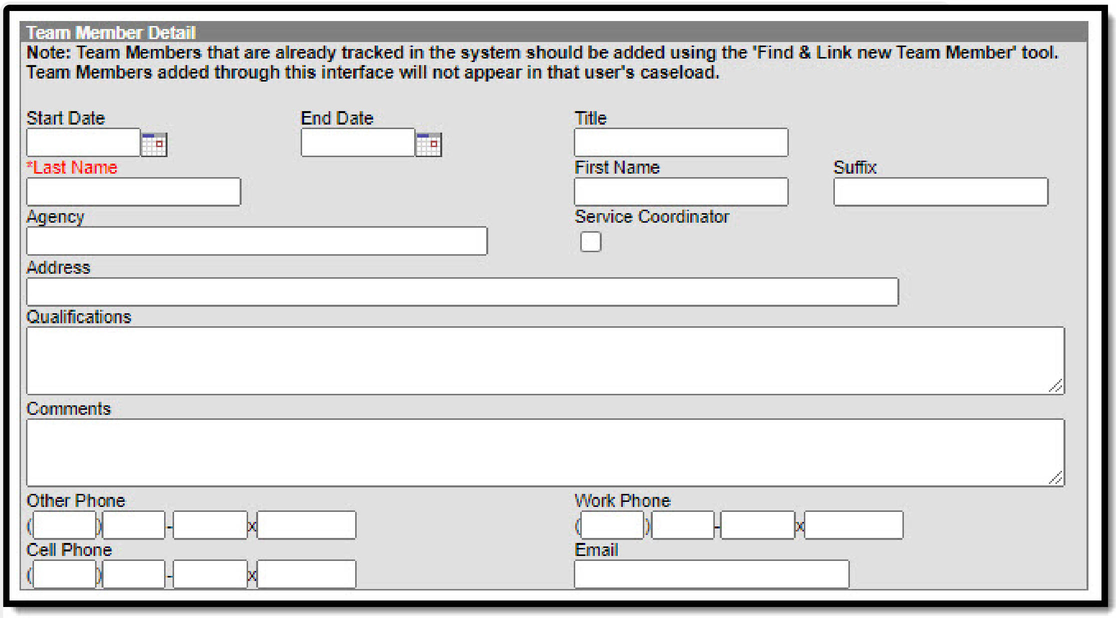

Image 3: Enter New Team Member

New Team Member Fields

Field	Description	Ad hoc Fields
Start Date	The first date that the team member record is active. Defaults to the current date.	teamMember.startDate
End Date	The last date that the team member will be considered active. Active team members appear in bold in the team member list.	teamMember.endDate
Title	The title of the individual in relation to the special education team membership.	teamMember.title
Last Name	The last name of the team member.	teamMember.lastName
First Name	The first name of the team member.	teamMember.firstName
Service Coordinator	Indicates if the team member is responsible for coordinating the services the student receives.	N/A
Agency	The agency the team member is associated with.	teamMember.agency
Address	The address associated with the team member, either the home address or the address of the agency.	N/A
Qualifications	The credentials that qualify the individual for team membership.	N/A

Field	Description	Ad hoc Fields
Comments	Any comments associated with the team membership.	N/A
Other Phone	Other phone number for contacting the individual.	N/A
Work Phone	The work phone number of the individual.	N/A
Cell Phone	The cell phone number of the individual.	N/A
Email	The email address of the individual.	N/A

Add New Team Members with the Enter New Team Members button

1. Select the **Enter New Team Member** button. A **Team Member Detail** editor displays.
2. Enter the desired fields as defined above.
3. Click the **Save** button when finished. The new member will display in the Team Member Editor.

Link All Classroom Teachers

The Link All Classroom Teachers button adds all of the student's teachers to their team. This option adds each Primary Teacher assigned to a course section in which the student is scheduled to view the student's education plan.

The "Link All Classroom Teacher Date Override" dialog displays. Start dates populate for each record based on when the student is enrolled in that teacher's class unless a different start date is entered. Entering a date pulls in teachers with the date entered as the start date.

The option to Link All Classroom Teachers only displays if the Special Ed Preference to *Enable Team Member List to Populate from Classroom Teachers* is set to Yes.

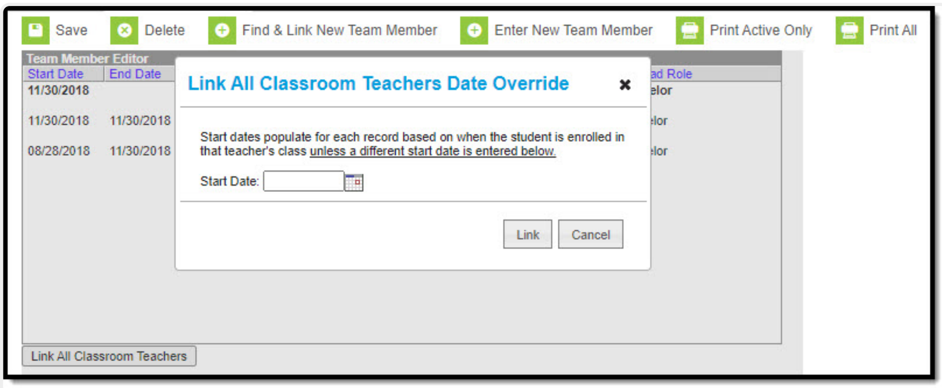

Image 4: Link All Classroom Teachers

Start and End dates populate for each teacher's record based on when the student is enrolled in that teacher's class. Membership records for teachers in future sections are entered as inactive memberships.

Edit

A Team Member record can be modified by selecting the Team Member from the list, making the necessary changes, and saving the record. This table describes the fields available when editing a Team Membership:

Field	Description
Start Date	The first date that the team member record is active. Defaults to the current date.
End Date	The last date that the team member will be considered active. Active team members appear in bold in the team member list.
Title	The title of the individual in relation to the special education team membership.
Caseload Role	The Caseload Role field describes the team member's involvement in the student's counseling team. Roles are not linked to tool rights. The Role of **Counselor** places the student on the user's Counseling Caseload.
Last Name	The last name of the team member.
First Name	The first name of the team member.
Suffix	The suffix of the team member.
Service Coordinator	Indicates if the team member is responsible for coordinating the services the student receives.
Agency	The agency the team member is associated with.
Address	The address associated with the team member, either the home address or the address of the agency.
Qualifications	The credentials that qualify the individual for team membership.
Comments	Any comments associated with the team membership.
Other Phone	Other phone number for contacting the individual.
Work Phone	The work phone number of the individual.
Cell Phone	The cell phone number of the individual.
Email	The email address of the individual.

Print

A PDF of all or just active team members can be printed by selecting the Print Active Only or Print All buttons.

To print a list of all active team members, click the **Print Active Only** button. To print all team members, including inactive ones, click the **Print All** button. The list of team members will print in PDF format, sorted by Active and Inactive, with the Name, Title and Contact Information for the team members.

If a team member's contact option is marked as Private on the Demographics tool, that value is hidden from view and will not be printed.

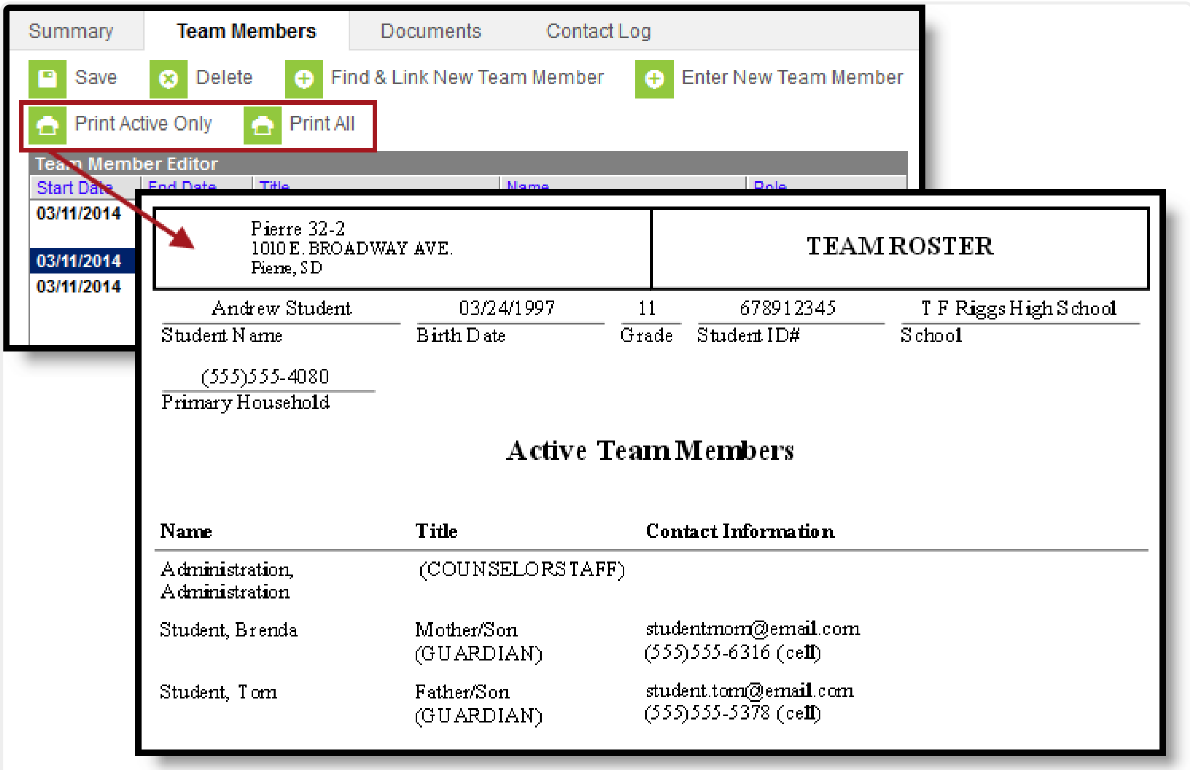

Image 5: Print Team Members