Counseling Contact Log [.2152 - .2215]

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You are viewing a previous version of this article. See Counseling Contact Log for the most current information.

Contact Log Fields in Ad hoc Query Wizard | Tool Rights for Contact Log | Enter a New Contact Log Record | Filter Contact Log Records | Print Contact Log Records | View Meetings Contact Log Entries

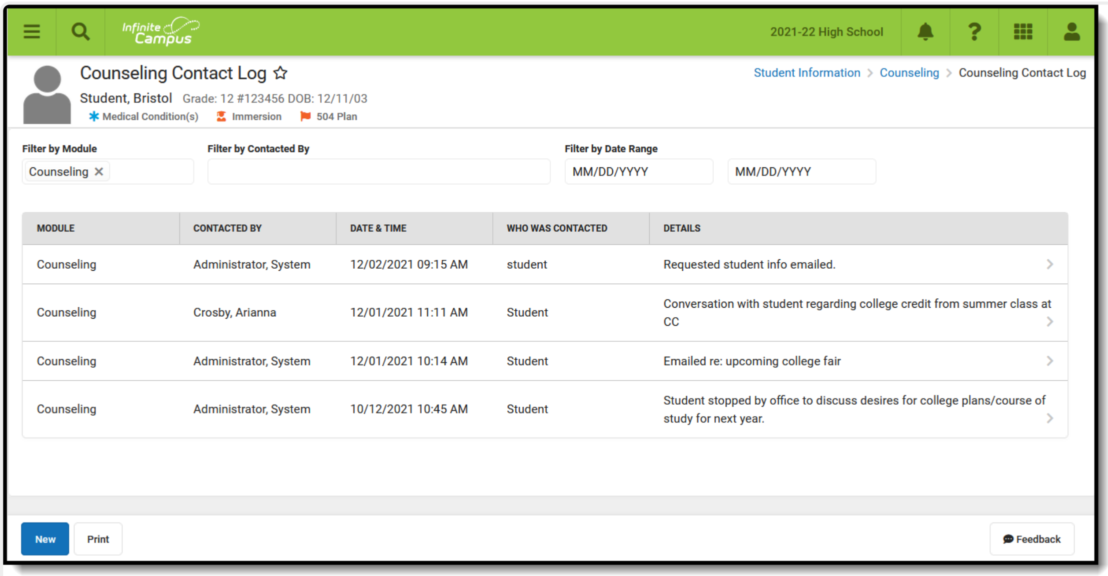
Classic View: Student Information > Counseling > Contact Log

Search Terms: Contact Log

The Counseling Contact Log records all instances of communication by school personnel regarding a particular student and their counseling needs. This communication can be with the student, their guardians, or others, and could include letters or email, phone calls, and face-to-face meetings.

There are several areas within Student Information that include a Contact Log tool - Counseling, Health, PLP, Response to Intervention (RTI), Special Education, plus several states that have a localized Contact Log for certain tools. In an effort to consolidate and streamline the process of managing communication between the school and students/guardians of students, the Contact Log in Student Information General is the main hub where all contact log records can be viewed and modified by school personnel who are granted proper tool rights. The Counseling Contact Log functions the same as this new Contact Log.

Submit feedback for the new Contact Log by clicking the **Feedback** button in the bottom right hand corner. This takes you to the Campus Community Contact Log forum topic where you can add your suggestions for the Contact Log.



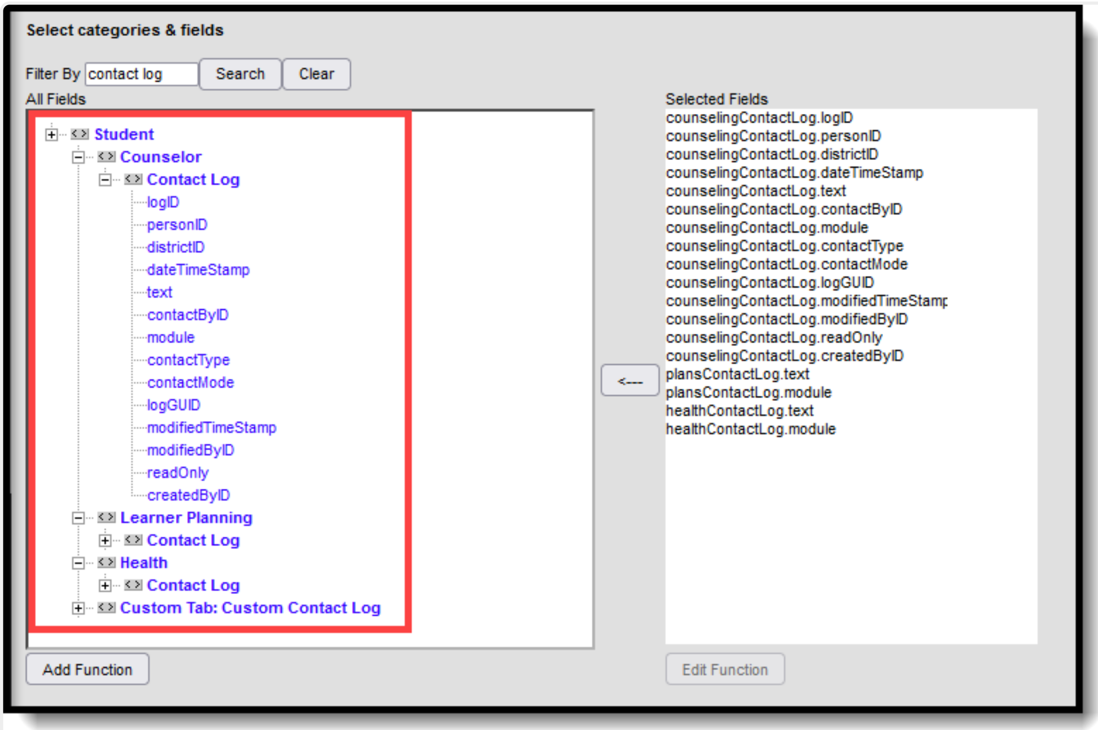
Counseling Contact Log

Contact Log Fields in Ad hoc Query Wizard

Information from the Contact Log records can be included in an Ad hoc Query using the **Student Data Type.** Contact log fields are available in the following locations:

- Student > Counselor > Contact Log
- Student > Learner Planning > Contact Log (includes fields for RTI, PLP and Special Education)
- Student > Health > Contact Log

See the Contact Log Detail Descriptions for specific Ad hoc fields.



Contact Log Ad hoc Fields

Tool Rights for Contact Log

General Tool Right Information | Assign Tool Rights to Contact Log | Contact Log Tool Rights Examples

Classic View: System Administration > User Security > Users > Tool Rights

General Tool Right Information

Classic Navigation:

Full rights to Contact Log require **RWAD** rights to Student Information > General > Contact Log, Health > Contact Log, Special Education > Contact Log, PLP > Contact Log, RTI > Contact Log:

- **R** rights allow the ability to view contact log records.
- **W** rights allow the ability to edit contact log records.
- **A** rights do not add new contact log records.
- **D** rights allow the ability to delete contact log records.

New Navigation:

Full rights to Contact Log require the following:

- **Rights** (On/Off checkbox set to On) to the **Contact Log** tool for Student Information > General > Contact Log.
- **RWAD** rights to the module level Contact Log tool right for the appropriate module -

Counseling, Health, PLP, RTI, Special Education, etc.

- **Access to Records Created by Other Users** subright for the appropriate module - Counseling, Health, PLP, RTI, Special Education, etc. This subright allows the user to view or edit contact log records another user created within a module (Counseling, Health, etc.).
  - **R** rights allow the ability to view records created by another user for the parent module.
  - **W** rights allow the ability to edit records created by another user for the parent module.
  - **A** rights do not add any function.
  - **D** rights allow the ability to delete records created by another user for the parent module.

Note the following:

- **On/Off rights to Student Information > General > Contact Log do NOT allow access to add a contact log record.** It only displays the Contact Log tool, but no existing records are visible.
- **RWAD rights are NOT cumulative**. A user who has no access subrights to Counseling, but does have RW rights to Health allows the viewing and editing of Health contact log records another user created.
- Assigning access subrights WITHOUT enabling rights to the parent Contact Log module tool right automatically assumes R rights for that parent right.

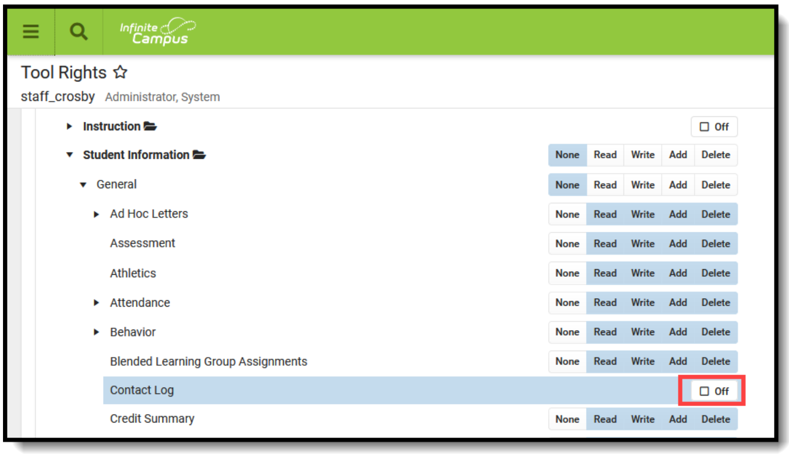
When updating to the Campus.2152 Release Pack:

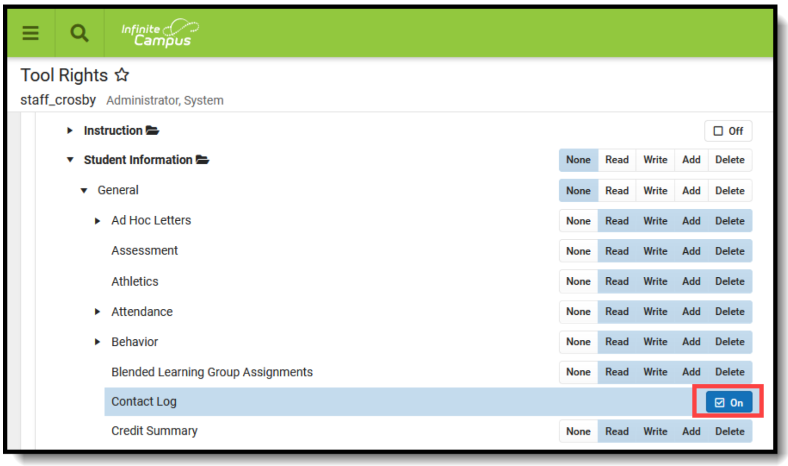
- Tool rights will have been converted for users who had tool rights to the parent contact log module prior to the update. System Administrators need to modify those rights to limit access.
- Student Information > General > Contact Log tool rights are NOT enabled. These rights will need to be turned On.

Assign Tool Rights to Contact Log

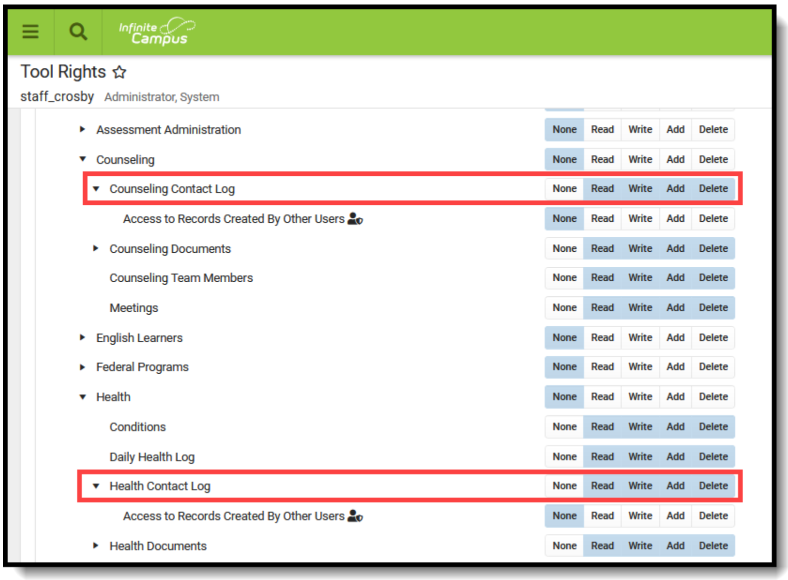
Procedures are provided using the new navigation.

1. Enable rights to Contact Log (Student Information > General > Contact Log) by marking the **Off** checkbox. Once marked, the Off checkbox changes to **On**.



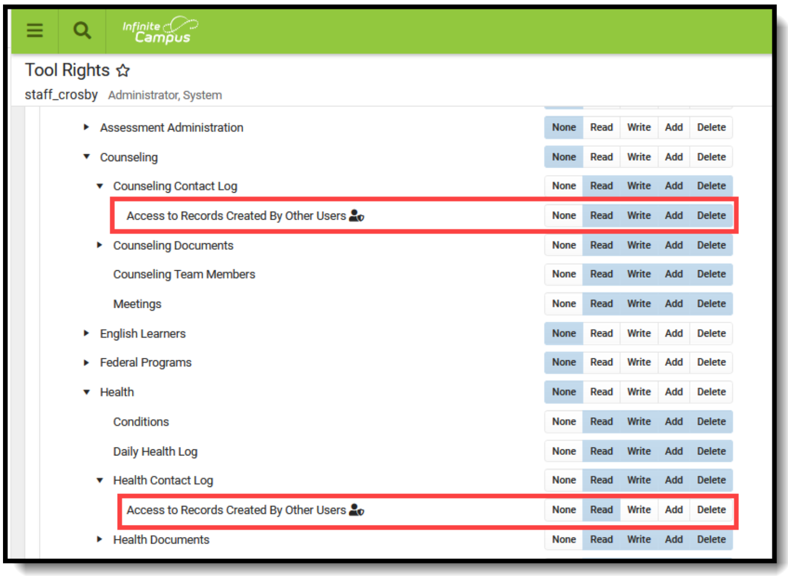


2. Assign appropriate **RWAD** rights to **Contact Log** modules as needed for the selected user(s). These tools are named as follows:
    - Counseling Contact Log (Student information > Counseling > Counseling Contact Log)
    - Health Contact Log (Student information > Health > Health Contact Log)
    - PLP Contact Log (Student information > PLP > PLP Contact Log)
    - RTI Contact Log (Student information > Response to Intervention > RTI Contact Log)
    - Special Education Contact Log (Student information > Special Ed > Special Ed Contact Log



3. Assign **RWAD** rights to **Access to Records Created by Other Users** for each Contact Log

module as needed for the selected user(s).



Contact Log Tool Rights Examples

Example 1: Counselor with access and ability to manage all Contact Log Records

A counselor who is responsible for general counseling activities (academic planning, behavior records, team members for learning plans, health management) may have the following tool rights for Contact Log:

▸ Click here to expand...

Example 2. Health Office Staff with access to Health Contact Logs Only

A counselor who is responsible for managing student interaction with the health office may have the following rights to Contact Log:

▸ Click here to expand...

Example 3. Special Education Team Member with access to other Learning Plan, Counseling and RTI

A team member who is responsible for managing learner plans, working with the student's counselor to assist with plan changes, and assisting with behavior management may have the following rights to Contact Log:

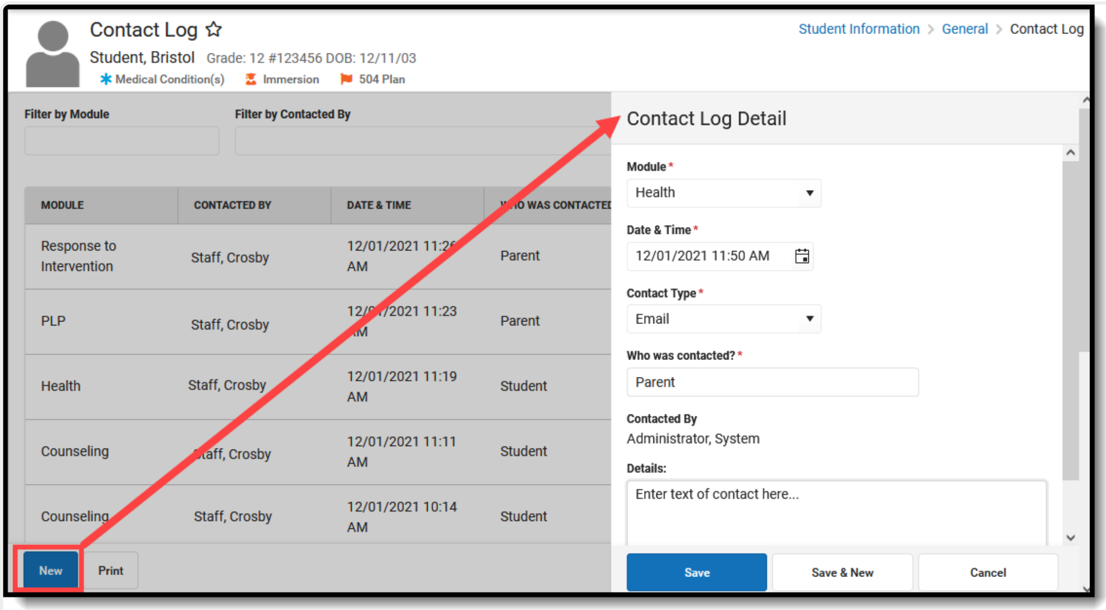
▸ Click here to expand...

Enter a New Contact Log Record

See the table following these procedures for descriptions of these fields, Ad hoc locations and

Database information.

1. Click the **New** button. A **Contact Log Detail** panel displays to the right.
2. Select the area of contact from the **Module** dropdown list. When entering a Contact Log record from a location other than the General Contact Log tool, the Module field is already populated with the area of product.
3. Verify the **Date and Time** field of the contact is correct. This field auto-populates with the current date and time. When entering a record from a contact that previously happened, modify this field accordingly.
4. Select the appropriate **Contact Type** from the dropdown list.
5. Enter who was contacted.
6. Enter the **Details** of the contact.
7. Click the **Save** button to save the record. Or, to enter another record for the same student, click the S**ave & New** button to save the record and enter another new record.



Add New Contact Log Record

Contact Log Detail Descriptions

Data Element	Description	Database and Ad hoc Field Locations

Data Element	Description	Database and Ad hoc Field Locations
Module	Lists the area where the contact was entered in the product, or the general topic of the contact. Options are: • Counseling • Health • PLP • Response to Intervention • Special Education	ContactLog.module **Ad hoc Location** • Counseling - Student > Counselor > Contact Log > **counselingContactLog.module** • Health - Student > Health > Contact Log > **healthContactLog.module** • PLP, RTI, Special Education - Student > Learner Planning > Contact Log > **plansContactLog.module**
Date and Time	Reports the date (mm/dd/yyyy) and time (HH:MM) the record was entered.	ContactLog.dateTimeStamp **Ad hoc Location** • Counseling - Student > Counselor > Contact Log > **counselingContactLog.dateTimeStamp** • Health - Student > Health > Contact Log > **healthContactLog.dateTimeStamp** • PLP, RTI, Special Education - Student > Learner Planning > Contact Log > **plansContactLog.dateTimeStamp**
Contact Type	Indicates how the individual was contacted. The list of options varies depending on what module is selected for the record. Additional options can be added in the Attribute/Dictionary.	ContactLog.contactType **Ad hoc Location** • Counseling - Student > Counselor > Contact Log > **counselingContactLog.contactType** • Health - Student > Health > Contact Log > **healthContactLog.contactType** • PLP, RTI, Special Education - Student > Learner Planning > Contact Log > **plansContactLog.contactType**

Data Element	Description	Database and Ad hoc Field Locations
Who was contacted?	Indicates the person intended for the contact.	ContactLog.contactMode **Ad hoc Location** • Counseling - Student > Counselor > Contact Log > **counselingContactLog.contactMode** • Health - Student > Health > Contact Log > **healthContactLog.contactMode** • PLP, RTI, Special Education - Student > Learner Planning > Contact Log > **plansContactLog.contactMode**
Contacted By	Records the staff person who entered the record.	ContactLog.contactByID **Ad hoc Location** • Counseling - Student > Counselor > Contact Log > **counselingContactLog.contactByID** • Health - Student > Health > Contact Log > **healthContactLog.contactByID** • PLP, RTI, Special Education - Student > Learner Planning > Contact Log > **plansContactLog.contactByID**
Details	Provides a text entry field for recording a detailed description of the contact.	ContactLog.text **Ad hoc Location** • Counseling - Student > Counselor > Contact Log > **counselingContactLog.text** • Health - Student > Health > Contact Log > **healthContactLog.text** • PLP, RTI, Special Education - Student > Learner Planning > Contact Log > **plansContactLog.text**

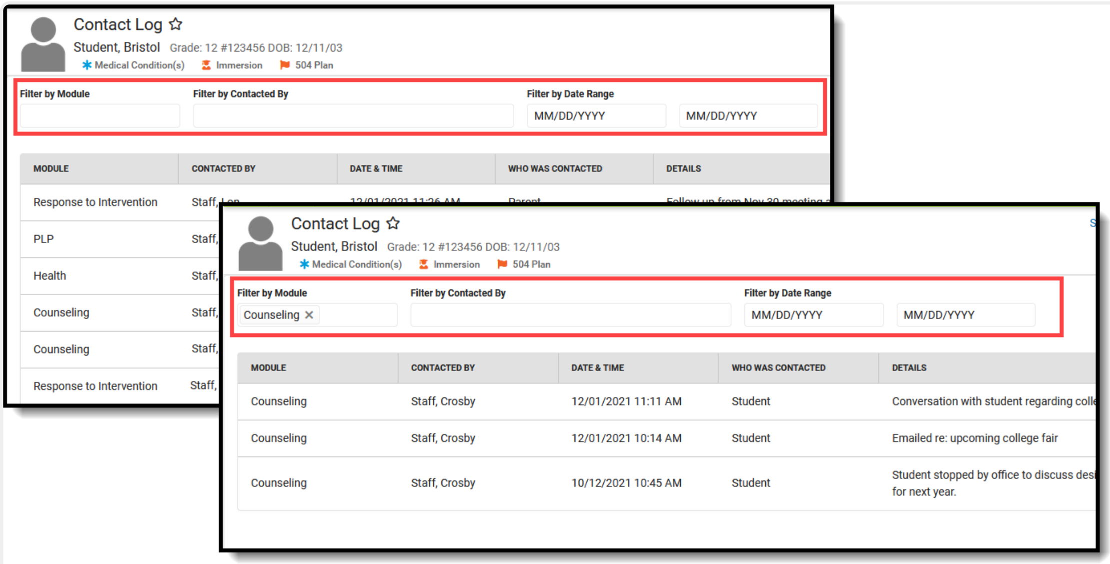
Filter Contact Log Records

The Contact Log organizes records by Module (the type of contact log record), Contacted By (who created the record), the date and time the record was saved, who was contacted, and the Details (reason) for the contact.

Contact Log records are sorted first by the Date and Time of the record, with the most recent record displaying first. To display contact log records for only one module, select that module in the Filter by Module field.Contact Log records can be sorted by Module, Contacted By, or Date Range.

Multiple Modules and Contact By options can be selected. For example, to return Counseling records entered by any member of the Counseling staff, choose Counseling in the Filter by Module and select the names of the Counseling staff in the Filter by Contacted By field.

In the example below, the Filter by Module field is set to Counseling, so only contact log records created in the Counseling module display. When there is no module chosen in the Filter by Module field, all Contact Log records display (as long as the staff person has rights to see contact log records from all areas).



All Contact Log Records vs. Filtering Contact Log Records by Module

To see all Contact Log records after using the Filter fields, click the X next to the filtered field, and/or remove the dates.

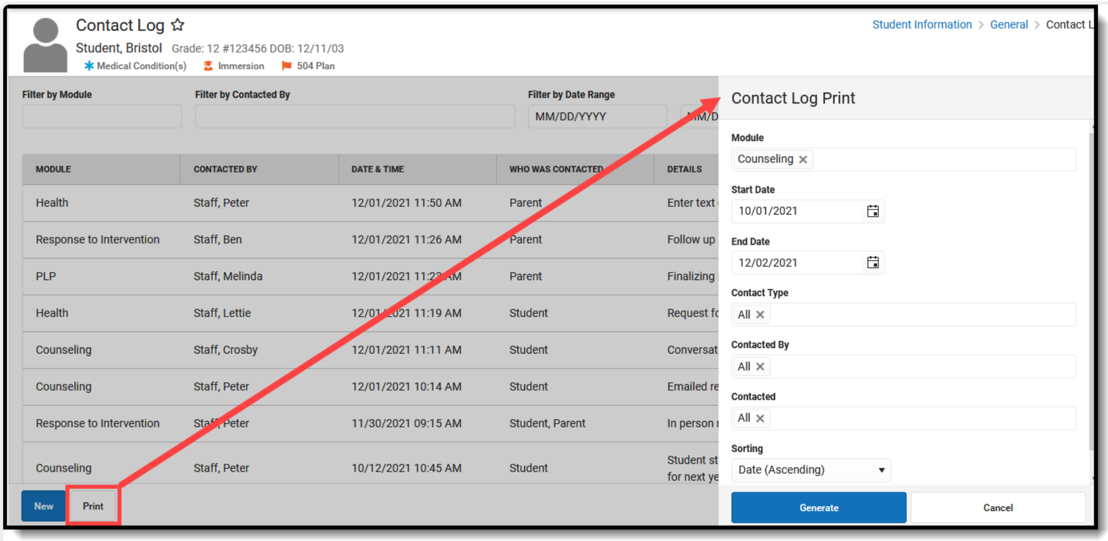
Print Contact Log Records

Default options are set to include every contact in each module, for all dates, contact types, entered by all staff, and contact made to all individuals, and sorted by date. These can be modified by removing the All option and adding specific values to the fields.

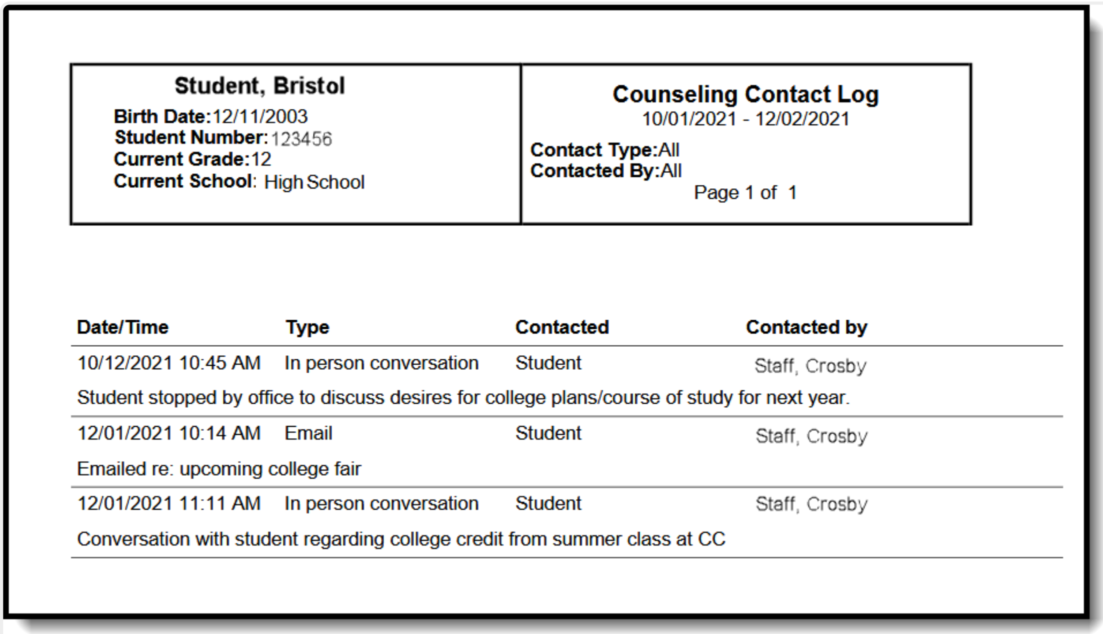
1. Click the **Print** button in the lower left corner. A **Contact Log Print** panel opens to the right.
2. Choose desired **Module** for which to print records.
3. Enter the **Start Date** and **End Date** to return records within that range only. Or, leave these fields without a selected date to print all records.
4. Select the desired **Contact Type**.

5. Selected the desired **Contacted By** option.
6. Choose the appropriate **Sorting** option - Date ascending, Date descending, or Contacted By.
7. Click the **Generate** button. The report prints in PDF format for the selected student.

In the example below, Counseling Contact Logs entered between October 1 and December 2 in ascending Date order are included.



Contact Log Print



Student, Bristol	**Counseling Contact Log**
Birth Date: 12/11/2003 **Student Number:** 123456 **Current Grade:** 12 **Current School:** High School	10/01/2021 - 12/02/2021 **Contact Type:** All **Contacted By:** All Page 1 of 1

Date/Time	Type	Contacted	Contacted by
10/12/2021 10:45 AM	In person conversation	Student	Staff, Crosby
Student stopped by office to discuss desires for college plans/course of study for next year.			
12/01/2021 10:14 AM	Email	Student	Staff, Crosby
Emailed re: upcoming college fair			
12/01/2021 11:11 AM	In person conversation	Student	Staff, Crosby
Conversation with student regarding college credit from summer class at CC			

Contact Log Report

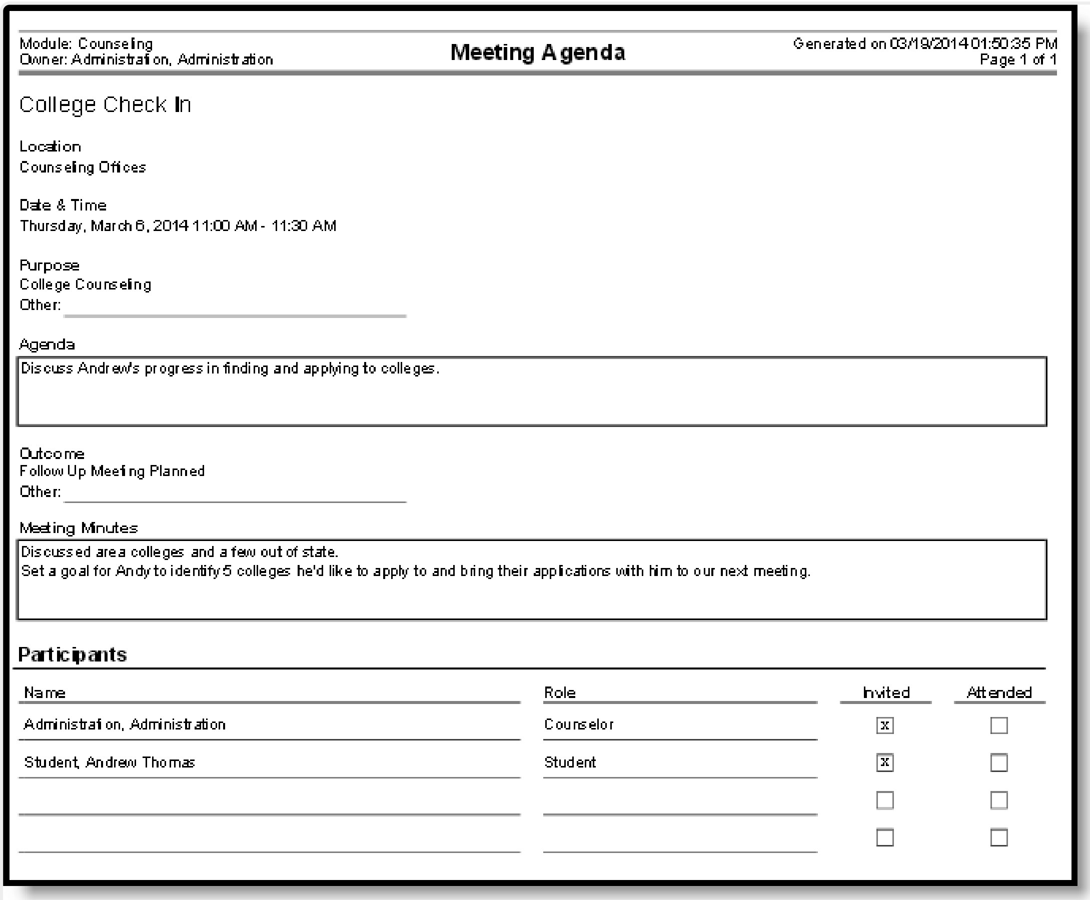
View Meetings Contact Log Entries

When notifications are sent for a meeting or meeting attendance is recorded using the Counseling Meetings tool, a contact log entry is recorded describing the meeting. Entries are created in the following scenarios:

- When the **Attended** checkbox is modified, a log entry is created or updated for each student who has **Log Contact** marked, listing the date/time of the meeting, those who attended and their roles.
- When you select **Update and Send Notification**, an entry is created for each student in the meeting who has **Log Contact** marked, listing the date/time of the notification, who sent the message, the type of message and whether it was sent to the student's Process Inbox, their email, or both.

Contact log entries show read-only information about the meeting, including title, location, date/time, purposes, and outcomes. Only users who are the meeting owner or a meetings administrator can view outcomes.

Click the **Title** of the meeting, in this example **College Check In** to view more details about the meeting if you are a meetings administrator, the owner of the meeting, or invited to the meeting. If you are only an invitee, only basic information displays.



Module: Counseling
Owner: Administration, Administration

Meeting Agenda

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College Check In

Location
Counseling Offices

Date & Time
Thursday, March 6, 2014 11:00 AM - 11:30 AM

Purpose
College Counseling
Other:

Agenda
Discuss Andrew's progress in finding and applying to colleges.

Outcome
Follow Up Meeting Planned
Other:

Meeting Minutes
Discussed area colleges and a few out of state.
Set a goal for Andy to identify 5 colleges he'd like to apply to and bring their applications with him to our next meeting.

Participants

Name	Role	Invited	Attended
Administration, Administration	Counselor	☒	☐
Student, Andrew Thomas	Student	☒	☐
		☐	☐
		☐	☐

Printed Details about the Meeting

Previous Versions

Counseling Contact Log [.2032 - .2148]