

# **Counseling Contact Log**

Last Modified on 03/11/2024 8:44 am CDT

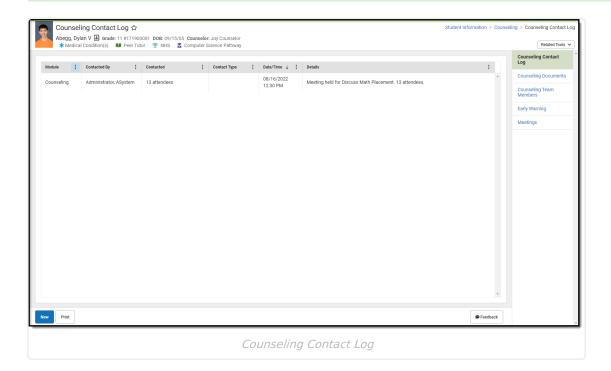
Contact Log Fields in Ad hoc Query Wizard | Tool Rights for Contact Log | Enter a New Contact Log Record | Filter Contact Log Records | Print Contact Log Records | View Meetings Contact Log Entries

Tool Search: 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 for example.

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.



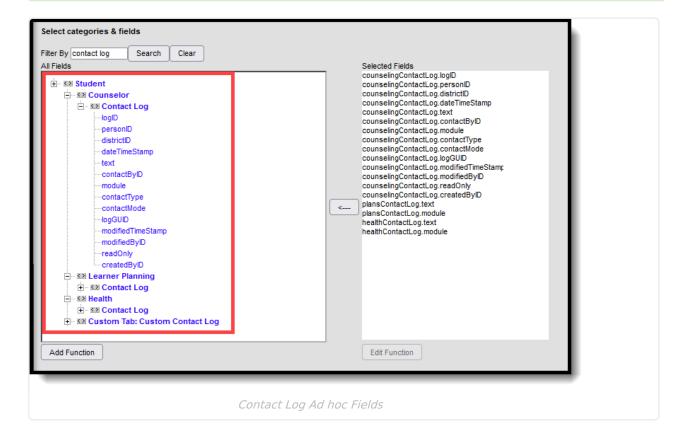


# Contact Log Fields in Ad hoc Query Wizard

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.



### **Tool Rights for Contact Log**

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

Tool Search: Tool Rights

#### **General Tool Right Information**

Full rights to Contact Log require the following:



- Rights (All checkbox marked) for the Contact Log tool for Student Information > General >
   Contact Log and Census > People > 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 module.
  - **W** rights allow the ability to edit records created by another user for the module.
  - A rights do not add any function.
  - $\circ$  **D** rights allow the ability to delete records created by another user for the module.

#### Note the following:

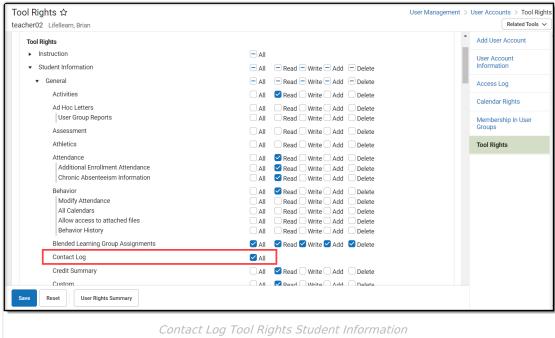
- All rights to Student Information > General > Contact Log and Census > People
   Contact Log do NOT allow access to add a contact log record. It only displays the Contact Log tool, but no existing records are visible.
- **RWAD rights are NOT cumulative**. A user who has no access subrights to Counseling, 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 assume R rights for that parent right.

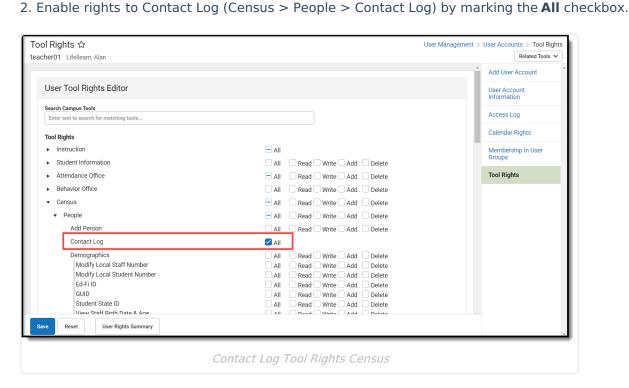
#### **Assign Tool Rights to Contact Log**

Procedures are provided using the new navigation.

1. Enable rights to Contact Log (Student Information > General > Contact Log) by marking the **All** checkbox.

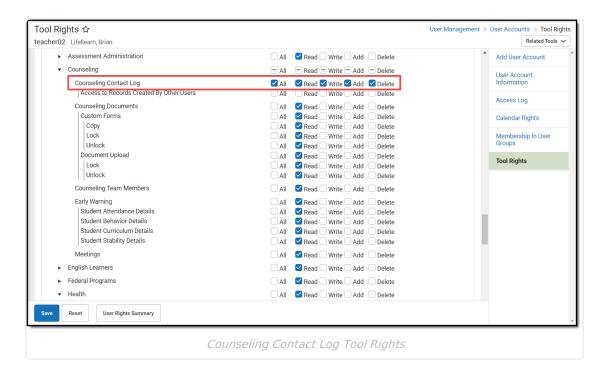




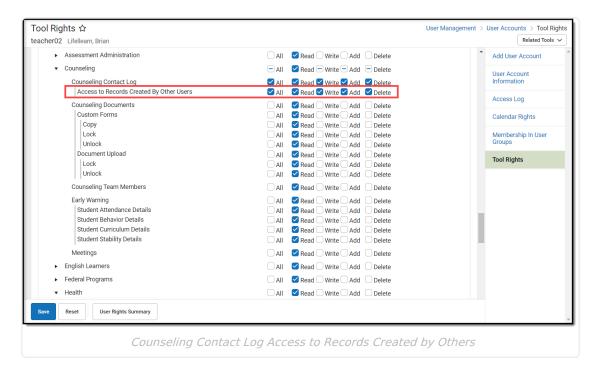


- 3. Assign appropriate **RWAD** rights to **Contact Log** modules as needed for the selected user(s). These tools are named as follows:
  - Counseling Contact Log (Student information > Counseling > Counseling Contact Log)
  - Health Contact Log (Student information > Health > Health Contact Log)
  - 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)
  - Attendance Contact Log (Attendance Office > Student Attendance > Attendance Contact Log)





4. 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:

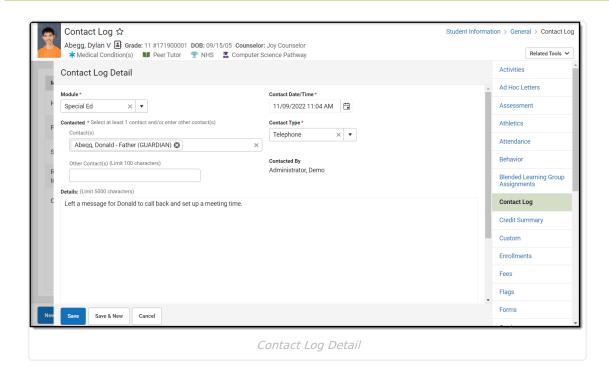
▶ Click here to expand...

### **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. The **Contact Log Detail** side panel displays.
- 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 **ContactDate/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. Use the **Contacted** fields to select and/or 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 **Save & New** button to save the record and enter another new record.





#### Contact(s) List Logic

The Contacts(s) dropdown list includes 6 different "types" of people and shows them in the following order:

- 1. the student themselves
- 2. people with current relationships to the student ("Guardian" will appear if the guardian checkbox has been marked)
- 3. people currently in the student's household
- 4. active teachers for course/sections a student is currently taking
- 5. any current Team Members for the student
- 6. people who have been contacted previously for this student who exist as users in Campus

#### **Contact Log Detail Descriptions**

Data	Description	Database and Ad hoc Field Locations
Element		



Data Element	Description	Database and Ad hoc Field Locations
Module	Lists the area where the contact was entered in the	ContactLog.module
	product, or the general topic of the contact. Options are:	Ad hoc Location  Attendance - Student > Attendance > Contact Log > Contacted > contactLogContactedID  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
Contact Date/Time	Reports the date (mm/dd/yyyy) and time (HH:MM) the record was entered.	ContactLog.dateTimeStamp
Date/Time		<ul> <li>Ad hoc Location</li> <li>Counseling - Student &gt; Counselor &gt;         Contact Log &gt;         counselingContactLog.dateTimeStamp</li> <li>Health - Student &gt; Health &gt; Contact Log &gt;         healthContactLog.dateTimeStamp</li> <li>PLP, RTI, Special Education - Student &gt;         Learner Planning &gt; Contact Log &gt;         plansContactLog.dateTimeStamp</li> </ul>
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
Contacted	Indicates the person or people intended for the contact. There are two fields where information can be entered. Select contacts who have been entered in Campus from the Contact(s) field. The Other Contacts field can be used to enter anyone who is not entered into Infinite Campus.	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

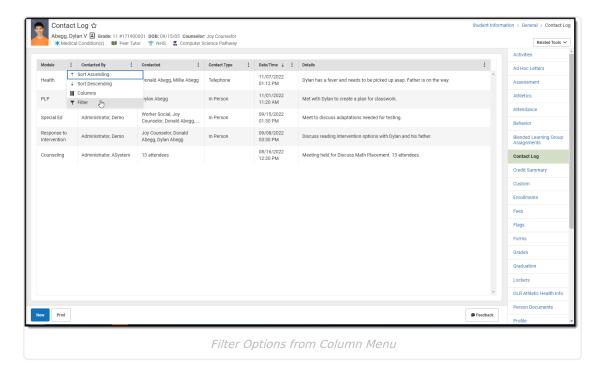
# **Filter Contact Log Records**

The Contact Log organizes records by Module (the type of contact log record), Contacted By (who made the contact), Contacted (who was contacted), Contact Type, the date and time the record was saved, 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 by using the filter option located in the Column Menu which is indicated by 3 dots to the right of each column.

In the example below, the Column Menu is open for the Module column showing the options available.



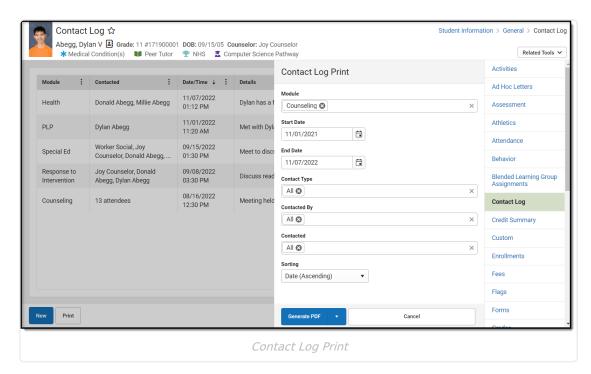
# **Print Contact Log Records**

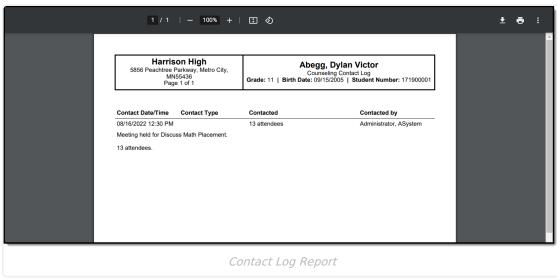
Default options are set to include every contact in each module, for all dates, contact types, entered by all staff, and contact made to all individuals, and sorted by date. These can be modified by removing the All option and adding specific values to the fields.

- 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. Select the desired **Contacted By** option.
- 6. Select the desired **Contacted** option(s).
- 7. Choose the appropriate **Sorting** option Date ascending, Date descending, or Contacted By.
- 8. Click the **Generate** button. The report prints in PDF or CSV 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.







# **View Meetings Contact Log Entries**

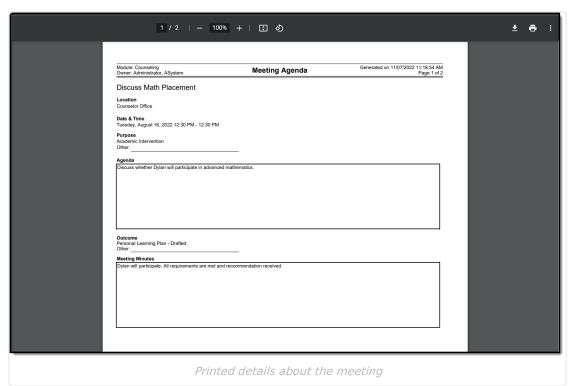
When notifications are sent for a meeting or meeting attendance is recorded using the Counseling Meetings tool, a contact log entry is recorded describing the meeting. Entries are created in the following scenarios:

- 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 **Discuss Math Placement** 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.







#### **Previous Versions**

Counseling Contact Log [.2219 - .2243]