

# Counseling Team Members [.2211 - .2315]

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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.

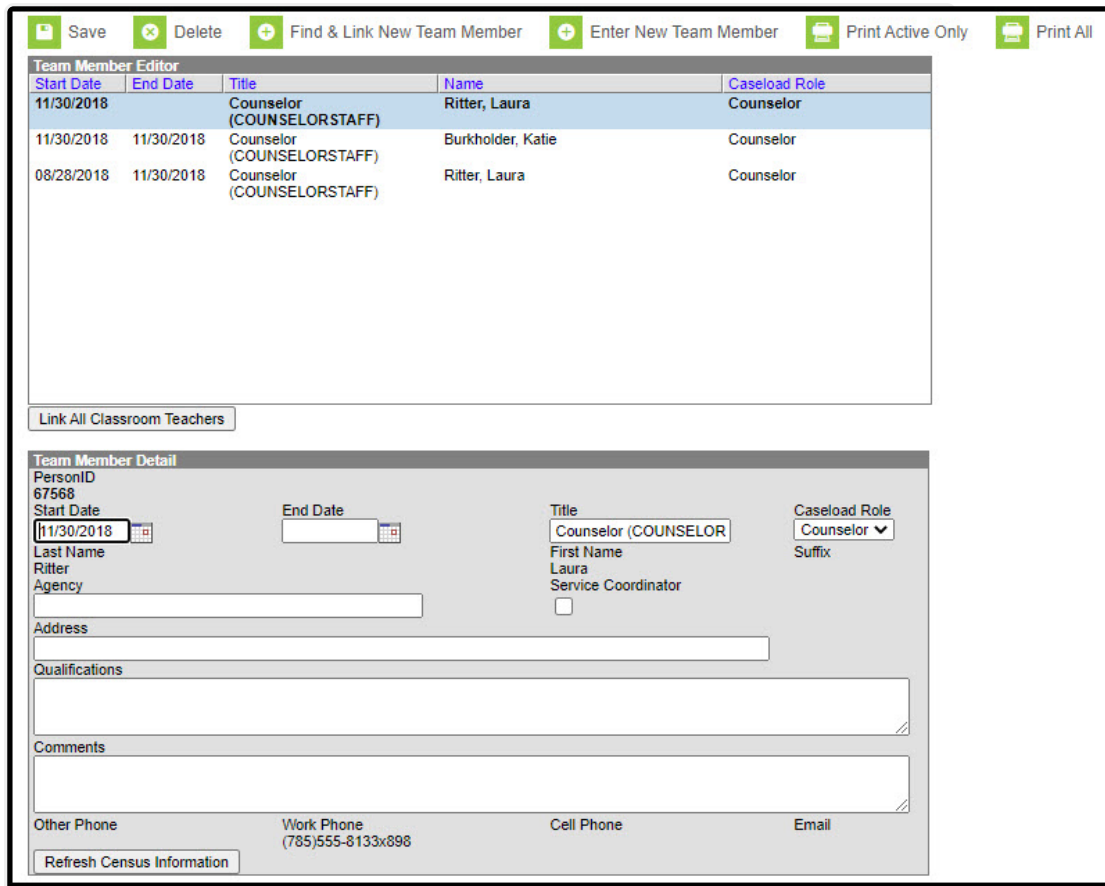


Image 1: Counseling Team Members

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.

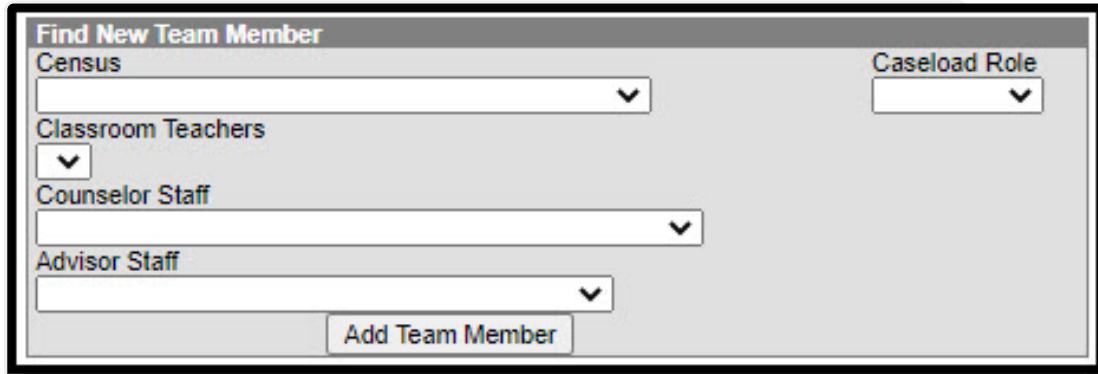


Image 2: Find and Link New Team Member

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
<b>Census</b>	This dropdown list is made up of individuals who have a connection of the student through 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).
<b>Caseload Role</b>	The Caseload Role field describes the team member's involvement in the student's counseling team. Roles are not linked to <a href="#">tool rights</a> . The Role of <b>Counselor</b> places the student on the user's Counseling Caseload.
<b>Classroom Teachers</b>	This field pulls a list of the student's current teachers, based on the the student's <a href="#">schedule</a> .
<b>Counselor</b>	This field includes staff members who have a <a href="#">District Assignment</a> of <b>Counselor</b> . Individuals are listed with their Name (last, first) and Title.
<b>Advisor Staff</b>	This field includes staff members who have a District Assignment of <b>Advisor</b> .

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
<b>Start Date</b>	The first date that the team member record is active. Defaults to the current date.	teamMember.startDate

Field	Description	Ad hoc Fields
<b>End Date</b>	The last date that the team member will be considered active. Active team members appear in bold in the team member list.	teamMember.endDate
<b>Title</b>	The title of the individual in relation to the special education team membership.	teamMember.title
<b>Last Name</b>	The last name of the team member.	teamMember.lastName
<b>First Name</b>	The first name of the team member.	teamMember.firstName
<b>Service Coordinator</b>	Indicates if the team member is responsible for coordinating the services the student receives.	N/A
<b>Agency</b>	The agency the team member is associated with.	teamMember.agency
<b>Address</b>	The address associated with the team member, either the home address or the address of the agency.	N/A
<b>Qualifications</b>	The credentials that qualify the individual for team membership.	N/A
<b>Comments</b>	Any comments associated with the team membership.	N/A
<b>Other Phone</b>	Other phone number for contacting the individual.	N/A
<b>Work Phone</b>	The work phone number of the individual.	N/A
<b>Cell Phone</b>	The cell phone number of the individual.	N/A
<b>Email</b>	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.

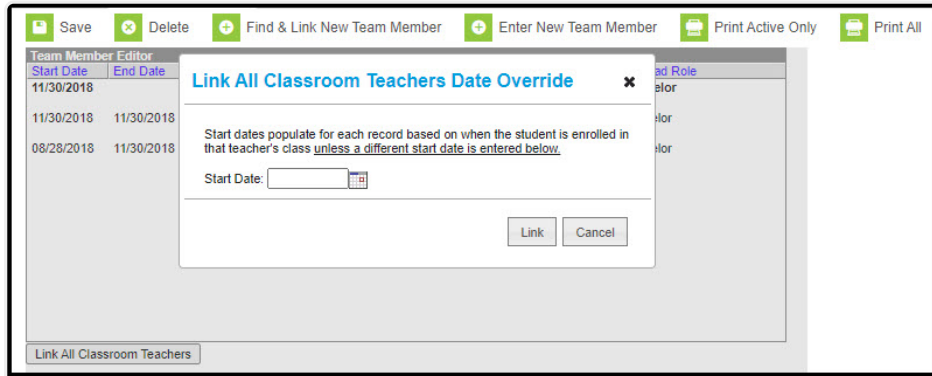


Image 4: Link All Classroom Teachers

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
<b>Start Date</b>	The first date that the team member record is active. Defaults to the current date.
<b>End Date</b>	The last date that the team member will be considered active. Active team members appear in bold in the team member list.
<b>Title</b>	The title of the individual in relation to the special education team membership.
<b>Caseload Role</b>	The Caseload Role field describes the team member's involvement in the student's counseling team. Roles are not linked to <a href="#">tool rights</a> . The Role of <b>Counselor</b> places the student on the user's Counseling Caseload.

Field	Description
<b>Last Name</b>	The last name of the team member.
<b>First Name</b>	The first name of the team member.
<b>Suffix</b>	The suffix of the team member.
<b>Service Coordinator</b>	Indicates if the team member is responsible for coordinating the services the student receives.
<b>Agency</b>	The agency the team member is associated with.
<b>Address</b>	The address associated with the team member, either the home address or the address of the agency.
<b>Qualifications</b>	The credentials that qualify the individual for team membership.
<b>Comments</b>	Any comments associated with the team membership.
<b>Other Phone</b>	Other phone number for contacting the individual.
<b>Work Phone</b>	The work phone number of the individual.
<b>Cell Phone</b>	The cell phone number of the individual.
<b>Email</b>	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.

Summary
**Team Members**
Documents
Contact Log

Save
Delete
Find & Link New Team Member
Enter New Team Member

Print Active Only
Print All

Start Date	End Date	Title	Name	Role
03/11/2014				
03/11/2014				
03/11/2014				

Pierre 32-2  
1010 E. BROADWAY AVE.  
Pierre, SD

### TEAM ROSTER

Student Name	Birth Date	Grade	Student ID#	School
Andrew Student	03/24/1997	11	678912345	T F Riggs High School

(555)555-4080  
Primary Household

### Active Team Members

Name	Title	Contact Information
Administration, Administration	(COUNSELOR STAFF)	
Student, Brenda	Mother/Son (GUARDIAN)	studentmom@email.com (555)555-6316 (cell)
Student, Tom	Father/Son (GUARDIAN)	student.tom@email.com (555)555-5378 (cell)

Image 5: Print Team Members