



# PSYCHOLOGICAL SERVICES COUNSELING HANDBOOK 2019

	Self	Social
A w a r e n e s s	<b>SELF AWARENESS</b>	<b>SOCIAL AWARENESS</b>
M a n a g e m e n t	<b>SELF MANAGEMENT</b>	<b>SOCIAL MANAGEMENT</b>

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# COUNSELING HANDBOOK

## ACKNOWLEDGEMENTS:

*We are deeply indebted to the work of educators throughout the country and have used their accomplishments as a foundation for this document. In particular, the work done in Anchorage, Alaska and by the state of Illinois have informed and inspired our work.*

## INTRODUCTION TO SOCIAL EMOTIONAL LEARNING

In order to provide effective social emotional supports and counseling services to the students of LAUSD, the methods used and goals developed must be based in current research and the student's progress towards their social emotional goals must be measurable. Our goal in developing this handbook is to provide a step by step guide for LAUSD school psychologists and counselors to identify the social emotional skills students need to be successful in the educational environment, community and transition to a career and/or college. Social Emotional Learning provides a framework that identifies skills students can be taught in multiple environments and allows us to identify a developmental trajectory for their acquisition.

## WHAT IS SOCIAL EMOTIONAL LEARNING (SEL)?

SEL is the process through which children and adults acquire the knowledge, attitudes, and skills they need to recognize and manage their emotions, demonstrate caring and concern for others, establish positive relationships, make responsible decisions, and handle challenging situations constructively. SEL is fundamental not only to children's social and emotional development but also to their health, ethical development, citizenship, motivation to achieve, and academic learning. Our emotions and relationships affect how and what we learn and how we use what we learn in work, family, and community contexts. On the one hand, emotions can enable us to generate an active interest in learning and sustain our engagement in it. On the other hand, unmanaged stress and poor regulation of impulses interfere with attention and memory and contribute to behaviors disruptive to learning. Moreover, learning is an intrinsically social and interactive process: it takes place in collaboration with one's teachers, in the company of one's peers, and with the support of one's family. The ability to recognize and manage emotions and establish and maintain positive relationships impacts both preparation for learning and the ability to benefit from learning opportunities. SEL skills and the supportive learning environments in which they are taught contribute to the resiliency of all children—those without identified risks and those at-risk for or already exhibiting emotional or behavioral problems and in need of additional supports.

For more on LAUSD's policies and initiatives around Social Emotional Learning:  
<http://achieve.lausd.net/Page/10277>

## WHY SEL BENCHMARKS?

Learning benchmarks create uniformity and coherence by establishing and communicating priorities, and providing a common language and structure for identifying student need and providing support. Standards are one element of a coordinated approach to effective education that includes:

- Clear and appropriate goals and objectives
- Links to evidence-based interventions and programs to achieve those goals
- Professional development for teachers and school staff to implement Tier I and Tier II programs and interventions to support social emotional development
- The identification of benchmark skills facilitates the monitoring of student progress.

Social Emotional Learning benchmarks describe what students are expected to know and be able to do at various ages or grade levels. In addition, they communicate educational priorities and provide a framework for building and organizing curricula and interventions.

Social emotional skills can be integrated into school climate initiatives, general education instruction, and part of targeted interventions. As with academic skills, in order to support students, it is essential to identify the skill deficit and, to determine the appropriate level of intervention. Student need in the area of academics is determined by evaluating his/her functioning vis-a-vis standards, and the degree to which the student is below grade-level expectations. Student social emotional need can also be evaluated in the context of developmental expectations to determine the most appropriate environment in which the student will acquire the skill.

## FOUR DOMAINS OF SOCIAL EMOTIONAL LEARNING

Research indicates that socially and emotionally competent children and youth are skilled in these core areas:

- **Self Awareness:** Students recognize their emotions, describe their interests and values, accurately assess their strengths, and access supports. They have a well-grounded sense of self-confidence and hope for the future. Behaviors and skills associated with self awareness are:
  - Recognizing and naming one's emotions
  - Understanding the reasons and circumstances for feeling as one does
  - Recognizing and naming emotions in others
  - Recognizing strengths in and mobilizing positive feelings about self, school, family and support networks
  - Knowing one's needs and values
  - Perceiving oneself accurately
  - Believing in personal efficacy
  - Having a sense of spirituality and/or connectedness to the community

- **Self Management:** Students regulate their emotions. They are able to manage stress, control impulses, and persevere in overcoming obstacles. They can set and monitor progress toward the achievement of personal and academic goals and express their emotions appropriately in a wide range of situations. Behaviors and skills associated with self management are:
  - Verbalizing and coping with anxiety, anger and depression
  - Controlling impulses, aggression, self destructive and maladaptive behavior
  - Managing personal and interpersonal stress
  - Focusing on the tasks at hand
  - Setting short and long term goals
  - Planning thoughtfully and thoroughly
  - Modifying performance in light of feedback
  - Mobilizing positive motivation
  - Activating hope and optimism
  - Working toward optimal performance states
  
- **Social Awareness:** Students are able to take the perspective of others and empathize with others. They will recognize and appreciate similarities and differences of the individual and/ or group. They are able to seek out and appropriately use family, school, and community resources. Behaviors and skills associated with social awareness are:
  - Appreciating diversity
  - Showing respect to others
  - Listening carefully and accurately
  - Increasing empathy and sensitivity to other's feelings
  
- **Social Management: (Relationship Skills & Decision Making)**
  - Students can establish and maintain healthy and rewarding relationships based on cooperation. They resist inappropriate social pressure; constructively prevent, manage, and resolve interpersonal conflict; and seek and provide help when needed.
  - Students demonstrate responsible decision-making and make positive contributions at school, at home, and in the community. In making decisions, they consider ethical standards, safety concerns, appropriate social norms, respect for others, and the likely consequences of various courses of action. They apply these decision-making skills in academic and social situations and are motivated to contribute to the well-being of their schools and communities. Behaviors and skills associated with social management are:
    - Analyzing situations perceptively and identifying problems clearly
    - Exercising social decision making and problem solving skills
    - Responding constructively and in a problem solving manner to interpersonal obstacles
    - Engaging in self reflection and self evaluation
    - Conducting oneself with personal, moral and ethical responsibility
    - Managing emotions in relationships, harmonizing diverse feelings and viewpoints
    - Showing sensitivity to social emotional cues

- Expressing emotions effectively
- Communicating effectively
- Engaging others in social situations
- Building relationships
- Working cooperatively
- Exercising assertiveness, leadership, and persuasion
- Managing conflict, negotiation, refusal
- Providing, seeking help

(Collaborative for Academic and Social Emotional Learning (CASEL) (2006) and House Committee on Education and Labor; Academic, Social, and Emotional Learning Act (HR 4223).

**TABLE 1: FOUR DOMAINS OF SOCIAL EMOTIONAL LEARNING**

	SELF	SOCIAL
	<b>Self-Awareness</b>	<b>Social-Awareness</b>
Awareness	<p><b>Goal 1:</b> Students demonstrate a strong sense of self-awareness.</p> <p>1a: Students identify and manage emotions and behavior.</p> <p>1b: Students recognize personal qualities and external supports.</p>	<p><b>Goal 3:</b> Student will show a strong sense of social awareness.</p> <p>3a: Students demonstrate awareness of other people’s emotions and perspectives.</p> <p>3b: Students recognize group similarities and differences.</p>
	<b>Self-Management</b>	<b>Social-Management</b>
Management	<p><b>Goal 2:</b> Students will demonstrate self-management skills.</p> <p>2a: Students use effective decision-making skills and goal setting skills.</p> <p>2b: Students will demonstrate an ability to prevent, manage, and resolve internal conflicts in constructive ways.</p>	<p><b>Goal 4:</b> Students will demonstrate social management skills.</p> <p>4a: Students use positive communication and social skills to interact effectively with others.</p> <p>4b: Students develop and contribute to the well-being of their school and community.</p>

**SEL – MULTI-TIERED SYSTEMS of SUPPORT AND SCHOOL BASED COUNSELING**

Within the school setting, SEL can best be accomplished through a multi-tiered approach of social skills instruction integration of social emotional lessons into the curricula and classroom practices, and school and classroom environments of safety, respect, and caring which models SEL values.

Social Emotional competencies can be addressed in schoolwide programs that contribute to positive school climates, classroom behavior and citizenship, specific curriculum such as Second Step, targeted interventions for at-risk students and more focused interventions for students not responding to the aforementioned supports. Targeted supports include evidence based practices for group and individual students based on

need. Interventions at the Tier I, II & III level may be implemented through the collaborative efforts of school staff, counselors, school psychologists and mental health providers. (see Appendix: MTSS Social Emotional Supports)

For students eligible for Special Education, counseling is a related service under federal law, and Designated Instruction Service (DIS) under state law. However, LAUSD policy is that schools are to assure that students with disabilities have access to regular guidance and counseling programs to the same extent as their non-disabled peers.

School based counseling takes many forms:

- General education counseling at the school site is provided by:
  - School Counselors
  - Community agencies that operate on the school site
  - School Psychologists
  - School Mental Health
- Crisis Counseling
- School Mental Health Clinics
- Designated Instructional Service (DIS) Counseling and Educationally Related Intensive Services (ERICS) provided to students who have Individualized Education Plans (IEP)

Students and their families may also be referred to mental health services in the community, as appropriate.

## **SCHOOL BASED COUNSELING POLICIES AND PROCEDURES**

### **STUDENTS IN GENERAL EDUCATION**

Individual and group counseling with the student may be conducted for situational needs (such as the death of a family member, divorce, etc.) or school based difficulties such as peer conflicts, anxiety in school, anger management, etc. In order to provide counseling for students on the school site, parental permission must be obtained for students. Written permission should indicate the length of time and the frequency of counseling offered.

School psychologists and school mental health providers can also provide consultation with students, parents/guardians, teachers, and other personnel regarding the effects of family and other social factors on the learning and developmental needs of the student.

### **CRISIS COUNSELING/SUPPORT**

When a crisis occurs at a school site the School Crisis Team meets to determine appropriate actions. The crisis can be contained to one student's experience, a schoolwide event, a community event, or a national crisis. In a crisis, counseling can be provided without parental permission. Ongoing counseling would require informed consent and permission from parent/guardian.

(For additional information regarding policies and resources for Crisis response please refer to: ([BUL-5800.0 Crisis Preparedness, Response and Recovery](#), dated October 12, 2015)

The lausd.net webpage [Crisis Counseling and Intervention Services](#) provides information, resources and documents to guide the provision of Crisis Intervention such as:

- [Crisis Response](#)
- [Threat Assessment](#)
- [Suicide Prevention](#)
- [Trauma Services](#)
- [Disaster Recovery](#)

## **DESIGNATED INSTRUCTIONAL SERVICE (DIS) COUNSELING**

Designated Instructional Services (DIS)/related services counseling is an additional support available when the general education guidance and counseling programs are not enough to meet the needs of students eligible for special education. DIS counseling services are considered only when they are necessary for the student to access the general education core or alternate curriculum. A student should not be receiving both DIS Counseling and general education school based counseling services.

Prior to referring a student for consideration of DIS counseling, school staff should implement appropriate modifications and document the student's response to targeted interventions, Tier I & Tier II social skills programs, and non-DIS school based counseling in the instructional environment.

DIS counseling should be considered if there is evidence, as documented in an assessment, of social-emotional behavior(s) impeding the student's ability to benefit from the special education program and to access the general education curriculum.

Counseling goals have been developed to align with grade-level social emotional expectations, to assist in identifying when students are struggling to attain age appropriate social functioning and when they might require counseling as a designated service

## **EDUCATIONALLY RELATED INTENSIVE SERVICES (ERICs)**

ERICs services may be considered for students whose behavioral and emotional needs are documented to be more serious in frequency, duration, or intensity; affect their ability to benefit from their special education program; and are manifested at school, at home, and in the community. When ERICs is being considered as a service, school psychologists should conduct the appropriate assessment (i.e. a comprehensive social emotional assessment) to determine student responsiveness to counseling and behavioral interventions in the Least Restrictive Environment.

ERICS may take the form of individual and group counseling. In addition, ERICS may include progress monitoring and consultation parents/guardians, teachers, and other personnel regarding the effects of family and other social factors on the learning and developmental requirements of individual students with exceptional needs. However, consultation should never be logged as a counseling service.

(For additional information refer to: Bulletin 5577.1 Counseling and Educationally Related Intensive Counseling Services (ERICS) for Student with Disabilities and the School Psychologists Informational Guide (SPIG).

## **IS FORMAL ASSESSMENT NEEDED TO ADD DIS COUNSELING OR ERICS?**

Formal assessment of social emotional functioning is required:

- When initially considering addition of DIS counseling and/or ERICS, or when changing the service from DIS to ERICS *if* a current social emotional or comprehensive psychoeducational has not been conducted within the last 6 months. An assessment plan should be generated to include Social Emotional assessment. A Social Emotional Report should be generated and presented at the IEP.
- If a social emotional assessment has been conducted in the past 6 months, school psychologists should summarize previous findings and update the student's social emotional needs in a Present Level of Performance on the IEP. If ERICS is a consideration, the update should include the relevant ERICS indicators.

Formal assessment is not required to:

- To report on student progress towards goals at annual IEPs or 3 year IEPs.
- Exit a student who has met IEP goals - informal assessment and progress monitoring data may be sufficient when there is agreement amongst IEP team members regarding the student's functioning.

Considerations: Best practice is to address students' social emotional needs in their instructional setting as this supports the generalization of skills to all environments and ensures that the student is supported in the Least Restrictive Environment.

Based on assessment results, should the IEP team agree that counseling services are warranted, the time and frequency of DIS counseling goals will be documented on Welligent. Documentation of the counseling sessions, as well as student response and progress shall be entered on Welligent in the service tracking function.

For students currently receiving counseling (DIS or ERICS) counseling providers will develop Present Levels of Performance for and participate in the Annual IEP meetings in which they will discuss student progress towards the DIS Counseling goal and collaborate with the IEP team to determine if there is a continued student need. The IEP team should consider if the student's social emotional needs could be addressed in the instructional environment. Providers may recommend exiting the student, adjusting the goal as appropriate or determining if a new goal should be developed based on current student social emotional functioning.

(For additional information, refer to: School Psychologists Informational Guide (SPIG))

## **GOALS & OBJECTIVES**

Counseling goals should be developed (a) when a social-emotional assessment has determined that a student has a need or (b) when a student who is receiving counseling requires an adaptation or change of goal. Counseling goals must align with needs identified in a Present Level of Performance on an IEP.

Welligent has a Counseling SEL Goalbank and most student social emotional needs can be addressed using goals from this goal bank. However, in case the goalbank does not address the student's particular needs, any goals developed must have the following required elements:

### **DIS Counseling/ERICs required goal elements**

- Area/Specific skill or set of skills (Self Awareness, Self Management, Social Awareness, Social Management)
- Frequency with which student will demonstrate the skill (in \_\_\_ out of \_\_\_ trials)
- Interval (per week, per month)
- Level of adult support (minimal, moderate, maximum)
- How the goal will be measured: as measured by (ex. counselor observation, teacher observation, teacher report, behavior logs, discipline referrals, attendance records, academic marks/progress reports, progress monitoring)
- Goals are required to have two incremental objectives that represent either scaffolding of the skill to be acquired and/or incremental steps towards demonstrating independence

See the Psychological Services webpage - Resources: Counseling DIS Goal Handbook June 2014 for a comprehensive guide to IEP counseling goals in the Welligent Counseling SEL Goalbank.

## **CREATION OF COUNSELING SERVICE RECORDS & FAPE AUTOMATION PROCESS**

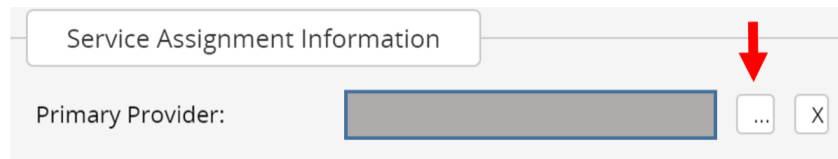
Service records for DIS counseling are required for the following:

- Regular School Year (RSY)
- Extended School Year (ESY) [ ESY service records will be left inactive until the student starts ESY].
- Future Changes Related to this IEP (FAPE page 2). For example students matriculating to Middle School

Service records with a future start date will be left inactive until the service start date

- Compensatory Time

For IEPs which establish the *initial* counseling service, **FAPE Automation does not** assign the provider. Service providers are able to assign themselves as a Primary Provider on unassigned service records by using the ellipsis button (...). Should a service provide not be able to assign themselves, they should contact their Specialist



FAPE Automation will set up a service record for those services included on the FAPE Part 2 grid of the IEP. The final lock of the IEP (inputting the date the district received parent signature) triggers the FAPE automation process. Student services should be provided as of the parent signature date..

IEPs for which counseling is a continuing service, two conditions must be met in order for the service to be assigned automatically to a counseling provider:

1. In Welligent prior IEP has an active service record for DIS Counseling with a Primary Provider assigned
2. The primary Provider must still have access to the school site

If these two conditions are not met, the FAPE Automation will generate a service record, but the counseling provider will have to be manually assigned.

When FAPE Automation creates a service record, service providers must update the new service record by filling out the remaining fields which are not pre populated from FAPE Part 2 of the IEP.

### **FAPE AUTOMATION & INACTIVATION OF SERVICE RECORDS**

FAPE automation will inactivate previous service records for FAPE Part 2 of the IEP for services which will continue or end.

- Welligent will not inactivate Additional Weeks or Compensatory time. This must continue to be done manually once the services if fulfilled.
- Welligent will not inactivate Stay Put records. These are marked as Stay Put by Welligent system and should only be marked for IEPs that have agreements with exceptions on page 10 of the IEP.

### **MANUAL INACTIVATION OF STUDENT RECORDS**

Do not inactivate a service record when a student transfers or L's out. Continue to document service and code as appropriate until the student is automatically re-assigned to a new provider or the record has been made inactive.

The only time a school psychologist should inactivate a record is:

- a. When a student is exited through the IEP process (and the parent signs the IEP)
- b. When a new IEP is held recommending a continuation of DIS counseling (and parent signs the IEP). In this case, the old record must be inactivated and a new one created to reflect the new IEP year.

### **COMPENSATORY COUNSELING SERVICE PLANS**

The District has also developed new procedures for addressing and offering compensatory services to students whose service provision falls below 70% at one of 3 predetermined benchmark dates. The Owed Services Plan

is one that schools will review when conducting IEP reviews for students whose parents received a notification letter that their child received less than 70% of a prescribed service.

This plan will indicate how minutes owed will be made-up before the end of the current school year and will include a future offer of compensatory services that will commence in the new school year. Here is an example statement for FAPE Part 2, Part 4 of the IEP:

**Student's Name** IEP dated MM-DD-YY had a **counseling** service requirement which was below 70% at the benchmark date. As of MM-DD-YY, **Student's Name** has received 75% of their prescribed **counseling** service. There are **300 minutes owed** year-to-date. A **counseling service provider** will make-up **100** minutes by June 7, 2019. Next school year, **200** minutes will be provided as compensatory services.

(For additional information see Outcome 13 PD September 2018 - on the Psychological Services Website)

## **CARLSON HOME TEACHING & DIS COUNSELING**

For students who are receiving Carlson Home Teaching and have DIS counseling as part of their IEP the provider is required to contact the family to offer that the student counseling at the school of RESIDENCE.

If you have a student on your counseling caseload that has been assigned to Carlson Home Teaching, inform your specialist **immediately** so if the school of residence is different than the school of attendance the student can be assigned to the appropriate psychologist.

- Your specialist will alert you by assigning these students to your counseling caseload on Welligent so an alert will be generated for you.
- If the family opts **not** to bring the student in for DIS counseling, the assigned school psychologist must schedule sessions and document "Student Absent" in order to remain in compliance with the IEP. Psychologists should document any information regarding contact or communication with parent in session notes.

## **OTHER COUNSELING CONCERNS**

### **STRATEGIES TO STAY IN COMPLIANCE WITH IEP DIS-COUNSELING SERVICES**

- The Welligent tracking system is designed to monitor IEP services.
- It is **not** to be used to keep track of all of the services a school psychologist may provide to a student, family, or teacher. Please use private notes to keep track of consultation, crisis counseling, or other counseling services provided.
- Document **only** the amount of minutes per session prescribed on the IEP.
- If a student is Absent/No Show/Refuse Treatment/School Closed/School Event/School-Wide Testing/Field Trip/Early Dismissal on the day of the scheduled session and the service is provided on another day during that interval (week/month), **only** document the session where counseling was provided.
  - Do not record both the session the student was absent **and** the session provided because this will come up as two sessions on the SER reports and the percentage will be elevated
  - Rather than "Student Absent/No Show/Refuse Treatment/School Closed/School Event/School-Wide Testing/Field Trip/Early Dismissal" for the excused session select "Delete-error".

## REPORTING PROGRESS TOWARDS THE GOAL FOR REPORTING PERIODS (Report Card)

School psychologists providing DIS or ERICS counseling should be reporting on student progress towards their counseling goals at the same intervals as report cards. Each IEP goal page has a section that needs to be completed and provided to parents. School psychologists can provide additional information regarding student progress if they desire. See Appendix A for details.

## SIGNING COUNSELING SERVICE LOGS

**All counseling services (DIS/PUC and ERICS) must be electronically signed.** This LAUSD Electronic Health Record (EHR) requirement is in compliance with the professional standards of the provider groups and the guidelines of the Center for Medicaid and Medicare Services for all Local Education Agency (LEA) providers and contracted providers. The electronic signature locks the record and prevents modification of the service record by anyone other than the provider. Modification of a service record can be made **only** by the provider who signed the record.

### Welligent Electronic Signature Instructions

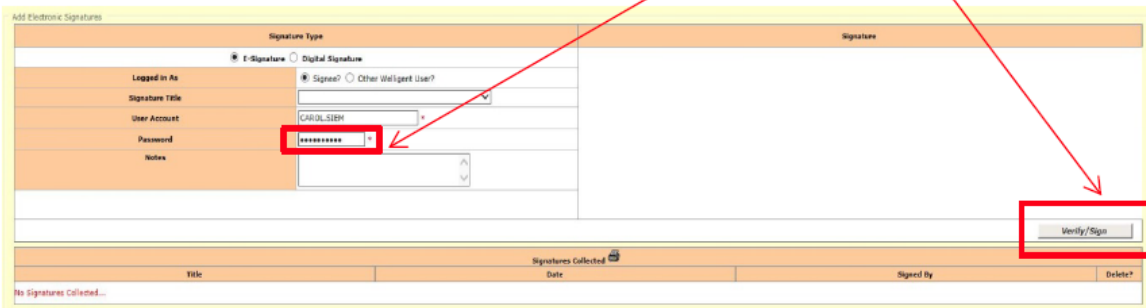
1. Click **Enter Notes** tab and input documentation. Click **Save**.
2. The **E-Signature** page will appear automatically after clicking **Save**.

The screenshot shows the 'Add Electronic Signatures' section of the Welligent EHR system. At the top, there is a 'Note Approval' table with columns for 'Supervisor Assigned', 'Approval Not Required', 'Original Feedback Date', 'Approval Status', and 'Approval Review Comments'. Below this is the 'Add Electronic Signatures' form. The form has a 'Signature Type' section with radio buttons for 'E-Signature' (selected) and 'Digital Signature'. Under 'E-Signature', there are fields for 'Logged in As', 'Signature Title', 'User Account', 'Password', and 'Notes'. The 'Signature Title' dropdown menu is currently empty. At the bottom of the form, there is a 'Signatures Collected' table with columns for 'Title', 'Date', 'Signed By', and 'Delete?'. The table is currently empty.

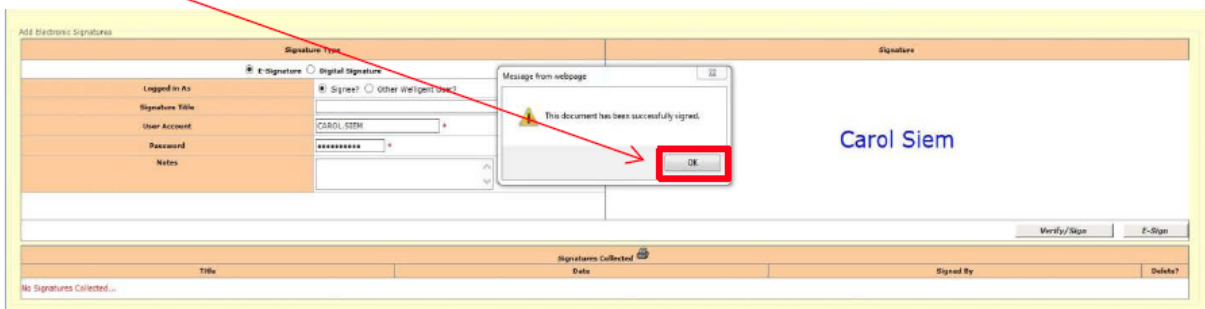
3. In the **Signature Title** box, select your title from the drop-down menu.

This screenshot is a close-up of the 'Add Electronic Signatures' form, specifically the 'Signature Title' dropdown menu. A red box highlights the dropdown menu, and a red arrow points to it, indicating the selection of a title. The dropdown menu is currently open, showing the selected title 'Speech Pathologist'.

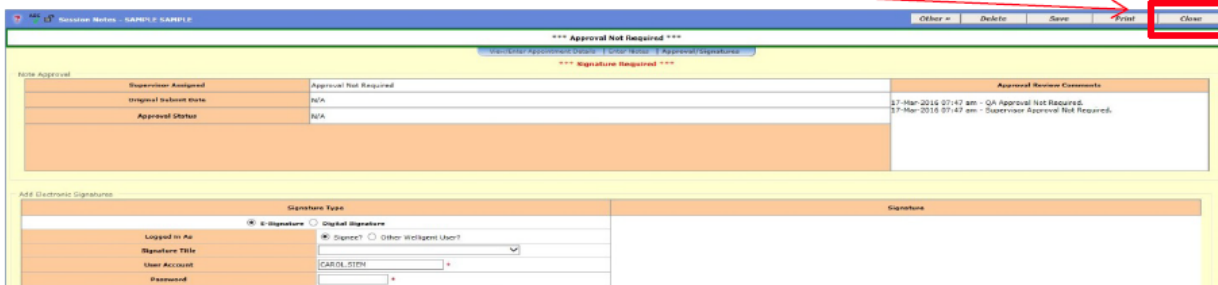
4. In the Signature Type box under provider name, enter **Password**. Click **Verify/Sign** button.



5. Click **OK** to the webpage message, "This document has been successfully signed".



6. Click **Close**.



7. When entering the e-signature (Message displays at closing: Did you remember to save your notes for this session?):


Click OK to close webpage message:

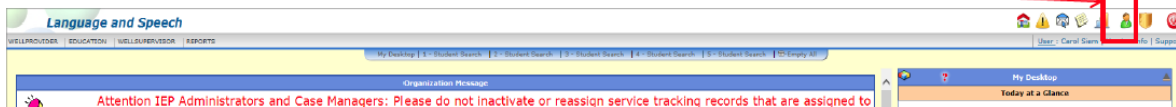


## UPDATING CREDENTIAL INFORMATION

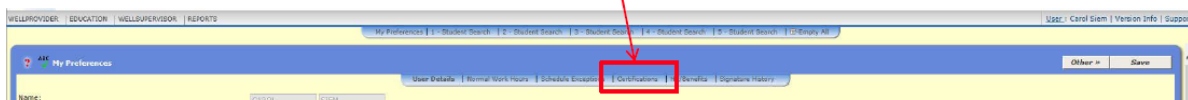
All service providers must update their certifications (license and/or credential required to provide services) in My Preferences/Certifications in Welligent for LAUSD to track state and federal compliance with Medi-Cal requirements. A 30-day alert will occur within 30 days of expiration to prompt users to update their certifications. Adding a credential should only be done for new credentials. To update the expiration date of an existing credential use edit rather than creating an entry for a new credential.

### Updating Licenses & Credentials in Welligent

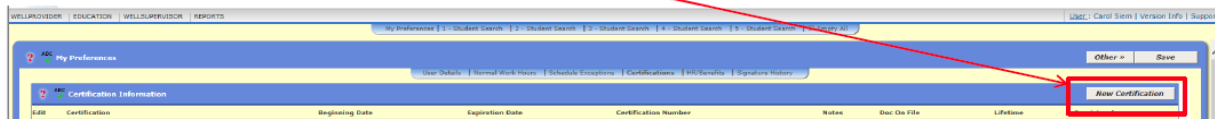
1. Log onto Welligent.
2. Click on the **My Preferences** icon  in the upper right corner of the screen.




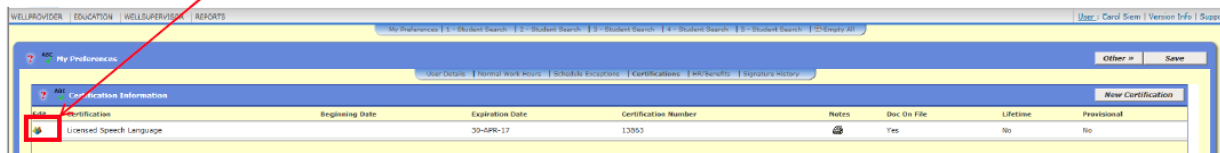
3. You will see the My Preferences screen User Details page. Click on the **Certifications** tab to get to your license information.



4. You will see the Certification Information page.
  - a. To add a license and/or credential, click on the **New Certification** button in the upper right corner. You will then see the Licensure and Certifications window.



- b. To update an existing license and/or credential, click on the **Edit** icon . You will then see the Licensure and Certifications window.



5. The Licensure and Certifications window: To add or update your license and/or certification see the instructions to the right of the dialog box.

For **Licensure/Certification**: Choose the appropriate title of your license and/or credential from the drop down menu.

- Verify your credential type and expiration date on the CTC website at <http://www.ctc.ca.gov> , choose **Search for Educator**, then **Public Search**
- Verify your license type and expiration date on your provider's state board website.

For **Beginning Date**: Enter the date you first received your license/credential.

For **Expiration Date**: Enter the expiration date for your license/credential.


For **Number**: Enter your license/credential number.

For Lifetime credentials, check mark the **Lifetime** box and leave the **Expiration Date** blank.

6. When finished, click **Save**, then **Close** when done.

## SER REPORTS AND COUNSELING LOGS

In order to identify students requiring counseling and accurately track service provision, school psychologists are required to run two Welligent reports (SER 300(A) and SER 315) on a weekly basis.

- Click on top right corner on the bar graph icon 
- Select SER 300(A) or 315g from list
- Click on bar graph icon on left
- For 300(A), click run
- For 315, select school, select service, click run

### SER 300(A) – 30 Day Service Delivery Report (Single Provider)

This report is a year-to-date report and must be run for each assigned location. The report provides information regarding all the students on your caseload. It contains the following information:

- IEP date
- FAPE Part 2
- Total Target Minutes
- Total Minutes Provided
- Percent Provided
- Minutes Owed
- Minutes Over
- Tier Message regarding service provision:

Tier 1 = 100%; Tier 2 = 90% - 99.9%; Tier 3 = 80% - 89.9%; Tier 4 = 50% - 79.9%; Tier 5 = 0.1% - 49.9%; Tier 6 = 0%

- As of date

### SER 315p – 30 Day Service Report (Missing Services – Single Provider)

- This report shows students who have IEPs with DIS/ERICS but do not have a service record and/or have not received any service in the past 30 days. If your school is compliant, this report will be blank.
- If you are assigned to more than one school site, you must select to run this report for each individual school site.
- Students who appear on this list may need (a) a service record created (b) reactivation of an inactive service record and/or (c) research on the current enrollment status.
- If student appears on this report who is not enrolled at your school, please notify your specialist immediately.



Tip - If a student is serviced 1x/per month, you must see them 1x in each 4 week period (not necessarily per calendar month). Otherwise, your SER will show 'no service provided'. Example: If you see a 1/x per month student on October 1, you need to see the student again on or before October 29.



Tip – if services are written as monthly (ex. 2x or 4x a month), the student will be owed for all sessions, even for months with breaks, such as Thanksgiving, Winter Break, and Spring Break



Tip - Welligent Service Tracking data is updated every 48 hours.

# APPENDIX A

## WELLIGENT TECHNICAL GUIDE FOR COUNSELING SERVICES

### GENERATING GOAL PAGE

- click on goals on left
- click IEP documents on right under IEP navigator
- click on green “+” sign to the right of section G pg. 5
- input “Social Emotional” at top
- to select a goal from the Goal Bank –
  - 1. Click on GB – open up Counseling SEL
  - 2. Select the domain of social emotional need and appropriate level
  - 3. Select the goal and input values

Los Angeles Unified School District

Student [Redacted] [Redacted] [Redacted] Date of Birth [Redacted] Meeting Date 28-FEB-2019

Section G: Annual Goals and Objectives

Performance Area: [Redacted] Annual Goal #: [Redacted] **GB**

The screenshot shows the 'Goal Bank' interface. On the left, there is a 'Goal Navigator' with a list of categories including '00 Kindergarten Math', '01st Grade', '02nd Grade', '03rd Grade', '04th Grade', '05th Grade', '06th Grade', '07th Grade', '08th Grade', '09th Grade', '10th Grade', '11th Grade', '12th Grade', 'Algebra 1 Course', 'Counseling SEL', 'Geometry Course', 'LAS - Language and Speech', and 'Preschool'. The 'Counseling SEL' category is expanded, showing sub-categories: '1A Self Awareness', '1B Self Awareness', '2A Self Management', '2B Self Management', '3A Social Awareness', '3B Social Awareness', '4A Social Management', and '4B Social Management'. Each sub-category has a list of levels: '1 Early Elementary', '2 Late Elementary', '3 Middle School', '4 Early High School', and '5 Late High School'. On the right, a detailed view of the selected goal '1A Self Awareness' is shown, with the level '1 Early Elementary' selected. Below this, there is a list of objectives: 'Identify Emotions', 'Connect Feelings with Body', 'Connecting Situations to Feelings', 'Facial and Body Language', and 'Use 'I Statements''.

**ABC Goal Bank Details (Read-Only) - Goal-1 Early Elementary**

Short Description:

Goal Long Description

<Student> will use 'I Statements' to express various emotions in <number> out of <number> trials per <interval> with <level of support> adult support as measured by <method of measurement>.

Associated Standard (English Only)

First Objective

<Student> will use 'I Statements' to express various emotions in <number> out of <number> trials per <interval> with <level of support> adult support as measured by <method of measurement>.

Second Objective

<Student> will use 'I Statements' to express various emotions in <number> out of <number> trials per <interval> with <level of support> adult support as measured by <method of measurement>.

Third Objective

Fourth Objective

Goal Bank - Replace Values - Welligent Integrated System

[https://welligent.lausd.net/pls/iepweb/goal\\_bank\\_pkgx.fillin\\_goals?objnum=G&goalfld=goal&obj1fld](https://welligent.lausd.net/pls/iepweb/goal_bank_pkgx.fillin_goals?objnum=G&goalfld=goal&obj1fld)

**ABC Replace Values**

Instructions

1. Enter the appropriate values into the boxes in the Insert Values section.
2. Click the button labeled 'Save to IEP'
3. If the completed goal/objective looks good, then Click 'Ok' to save this text to the IEP or 'Cancel' and 'Reset' to begin again.

English Text

<Student> will use 'I Statements' to express various emotions in <number> out of <number> trials per <interval> with <level of support> adult support as measured by <method of measurement>.

Spanish Text

<Estudiante> utilizará 'declaraciones de yo' para expresar varias emociones en <número> de <número> eventos por <evento> con apoyo adulto <nivel de apoyo> basado en <método de medida>.

Insert Values

will use 'I Statements' to express various emotions in  out of  trials per  with  adult support as measured by .

**Replace Values**

**Instructions**

1. Enter the appropriate values into the boxes in the Insert Values section.
2. Click the button labeled 'Save to IEP'
3. If the completed goal/objective looks good, then Click 'Ok' to save this text to the IEP or 'Cancel' and 'Reset' to begin again.

**English Text**

<Student> will use 'I Statements' to express various emotions in <number> out of <number> trials per <interval> with <level of support> adult support as measured by <method of measurement>.

**Spanish Text**

<Estudiante> utilizará 'declaraciones de yo' para expresar varias emociones en <número> de <número> eventos por <evento> con apoyo adulto <nivel de apoyo> basado en <método de medida>.

**Insert Values**

will use 'I Statements' to express various emotions in  out of  trials per  with  adult support as measured by .

Apply this text to Objective #:  1  2

**Replace Values**

**Instructions**

1. Enter the appropriate values into the boxes in the Insert Values section.
2. Click the button labeled 'Save to IEP'
3. If the completed goal/objective looks good, then Click 'Ok' to save this text to the IEP or 'Cancel' and 'Reset' to begin again.

**English Text**

<Student> will use 'I Statements' to express various emotions in <number> out of <number> trials per <interval> with <level of support> adult support as measured by <method of measurement>.

**Spanish Text**

<Estudiante> utilizará 'declaraciones de yo' para expresar varias emociones en <número> de <número> eventos por <evento> con apoyo adulto <nivel de apoyo> basado en <método de medida>.

**Insert Values**

will use 'I Statements' to express various emotions in  out of  trials per  with  adult support as measured by .

Apply this text to Objective #:  1  2

Reset      Cancel      Save to IEP

**Section G: Annual Goals and Objectives**

Performance Area:

Annual Goal #  **GB**

Student will improve his self awareness (verbalized feelings and or needs in 2 out of 4 instances) and self management skills (copes with negative feelings and situations adaptively in 2 out of 4 incidents) with moderate supports as observed and measured by teachers and counselor.

Progress on annual goals to be reported to parents by completing the "IEP Report of Progress and Achievement from Current IEP" form(s) which will be provided at either Progress Report or Report Card periods.

**Methods of Evaluation:**

- State Assessments   
  Norm Referenced   
  Criterion Referenced   
  Curriculum Based   
  Observation  
 Portfolio   
  Work Samples   
  Informal   
  Other:

**Incremental objective #1 related to the goal:**

Student will learn emotional vocabulary and use specific language to accurately describe his feelings and experiences in counseling in 3 out of 5 trials with moderate supports as measured by counselor.

**Incremental objective #2 related to the goal:**

In counseling Student will participate in activities to learn strategies to resolve and cope with his negative feelings in an adaptive manner (reduce avoidance and aggression) in 2 out of 4 trials with moderate supports as measured by counselor

Date to be achieved   MO/YR

Date to be achieved   MO/YR

**IEP REPORT OF PROGRESS AND ACHIEVEMENT FROM CURRENT IEP**

**EXPLANATION OF MARKS**

4 GOAL MET OR EXCEEDED		3 SUBSTANTIAL PROGRESS (50-99% of goal met)		2 PARTIAL PROGRESS (1-49% of goal met)		1 NO PROGRESS	
1st Reporting Period		2nd Reporting Period		3rd Reporting Period		4th Reporting Period (Secondary Only)	
Date: <input type="text"/>		Date: <input type="text"/>		Date: <input type="text"/>		Date: <input type="text"/>	
Progress Mark: <input type="text"/>		Progress Mark: <input type="text"/>		Progress Mark: <input type="text"/>		Progress Mark: <input type="text"/>	
Is progress sufficient to meet annual goal? <input type="radio"/> Yes <input type="radio"/> No		Is progress sufficient to meet annual goal? <input type="radio"/> Yes <input type="radio"/> No		Is progress sufficient to meet annual goal? <input type="radio"/> Yes <input type="radio"/> No		Is progress sufficient to meet annual goal? <input type="radio"/> Yes <input type="radio"/> No	
If "No" please comment: <input type="checkbox"/> Needs More Time <input type="checkbox"/> Excess Absence/Tardy <input type="checkbox"/> Assignments Not Completed <input type="checkbox"/> Need to review/revise Goal <input type="checkbox"/> Other <input type="text"/>		If "No" please comment: <input type="checkbox"/> Needs More Time <input type="checkbox"/> Excess Absence/Tardy <input type="checkbox"/> Assignments Not Completed <input type="checkbox"/> Need to review/revise Goal <input type="checkbox"/> Other <input type="text"/>		If "No" please comment: <input type="checkbox"/> Needs More Time <input type="checkbox"/> Excess Absence/Tardy <input type="checkbox"/> Assignments Not Completed <input type="checkbox"/> Need to review/revise Goal <input type="checkbox"/> Other <input type="text"/>		If "No" please comment: <input type="checkbox"/> Needs More Time <input type="checkbox"/> Excess Absence/Tardy <input type="checkbox"/> Assignments Not Completed <input type="checkbox"/> Need to review/revise Goal <input type="checkbox"/> Other <input type="text"/>	
						Goal Achievement Objective 1 Met: <input type="radio"/> Yes <input type="radio"/> No Objective 2 Met: <input type="radio"/> Yes <input type="radio"/> No If "No" please explain: <input type="text"/>	

Select progress

Indicate if goal was

Input date: match with school reporting period dates and provide to parents at each reporting period

For Annual IEP meeting indicate if objectives were met and if not, explain



Tip: The date is the reporting period NOT the objective reached date.

**GENERATE FAPE 2 SERVICE PAGE**

- Open Student IEP record
- Complete goal page and save/close (a service page cannot be generated if you don't have a goal)
- Click on Services tab
- Click on Add Service
- Input all data
- Select social emotional goal at the bottom, save

Interval

Regular or ESY  
(one record  
for each as

No End Date

Number of  
times you see  
the student in  
the interval

Total number  
of minutes

Select delivery  
(direct/indirect)

Select personnel

Select goal

	Effective With This IEP	Future Changes Related To This IEP
*Service:	Counseling and Guidance	
*Start Date:	Effective on Signature Date	
End Date:		
*Service Applies To:	ESY	
*Frequency:	1	
*Interval:	Weekly	
*Minutes/Interval:	30	
*Minutes/Interval Pullout from Gen Ed):	0	
*Service Delivery Model:	Direct Service (By a Single Provider)	
*Responsible Personnel:	Licensed/Credentialed Provider	
Responsible Personnel:		
Responsible Personnel:		
Responsible Personnel:		
Responsible Personnel:		
Responsible Personnel:		
Responsible Personnel:		
This service addresses the following goal(s): *		
<input type="checkbox"/> (Health and Nursing Services) <input type="checkbox"/> 3(MATH) <input type="checkbox"/> 2(Writing ) <input type="checkbox"/> 1(Reading ) <input type="checkbox"/> (Behavioral Support) <input checked="" type="checkbox"/> 4(Social Emotional)		

If in RSP, pullout minutes should  
equal the interval. If SDP, pullout  
minutes should be zero.



Tip: All boxes with a red asterisk (\*) must be filled in in order to save

- To make any changes at a later time click on "service #" in black block, save changes

<b>Service 1</b>	Start Date:	Effective on Signature Date
<b>04</b>	End Date:	
<b>Counseling and Guidance</b>	Service applies to:	ESY
	Frequency:	1
This service addresses the following goals:	Interval:	Weekly
4(Social Emotional)	Minutes/Interval:	30
	Minutes/Interval (Pullout from Gen Ed):	0
	Service Delivery Model:	Direct Service (By a Single Provider)*
	Responsible Personnel:	Licensed/Credentialed Provider

## FAPE 2 Service Page Examples:

### Students in Resource Specialist Program (RSP):

Option 1: Student in RSP requires DIS counseling 1x/week 30 min., note: pull out of gen ed. is equal to 30 minutes served (because students spends most of day in gen ed.).

Start Date:

Effective on Signature Date  
17-Nov-2011

04 Counseling and Guidance	End Date:	
This service addresses the following goals:	Service applies to:	Regular
5(social emotional)	Frequency:	1
	Interval:	Weekly
	Minutes/Interval:	30
	Minutes/Interval (Pullout from Gen Ed):	30
	Service Delivery Model:	Direct Service (By a Single Provider)*
	Responsible Personnel:	Licensed/Credentialed Provider

**Option 2: Student in RSP receives DIS counseling services 2x/mo. for total of 60 min./month**

	Start Date:	Effective on Signature Date 25-Oct-2011
04 Counseling and Guidance	End Date:	
This service addresses the following goals:	Service applies to:	Regular
(social emotional)	Frequency:	2
	Interval:	Monthly
	Minutes/Interval:	60
	Minutes/Interval (Pullout from Gen Ed):	60
	Service Delivery Model:	Direct Service (By a Single Provider)*
	Responsible Personnel:	Licensed/Credentialed Provider

**Special Day Program SDP**

**Option 1: Student in SDP requires DIS counseling 1x/week 30 min., note: pull out of gen ed. is equal to 0 minutes (because student spends most of day in special ed.).**

	Start Date:	Effective on Signature Date 25-Oct-2011
04 Counseling and Guidance	End Date:	
This service addresses the following goals:	Service applies to:	Regular
(social emotional)	Frequency:	1
	Interval:	Weekly
	Minutes/Interval:	30
	Minutes/Interval (Pullout from Gen Ed):	0
	Service Delivery Model:	Direct Service (By a Single Provider)*
	Responsible Personnel:	Licensed/Credentialed Provider

**Option 2: Student in SDP receives DIS counseling services 2x/mo. for total of 60 min./month**

	Start Date:	Effective on Signature Date 25-Oct-2011
04 Counseling and Guidance	End Date:	
This service addresses the following goals:	Service applies to:	Regular
(social emotional)	Frequency:	2
	Interval:	Monthly
	Minutes/Interval:	60
	Minutes/Interval (Pullout from Gen Ed):	0

	Service Delivery Model: Responsible Personnel:	Direct Service (By a Single Provider)* Licensed/Credentialed Provider
--	---	--

**Students eligible for DIS counseling in ESY:**

The only difference is indication of ESY, no other aspects are changed. You must create an additional FAPE 2 service page for ESY.

	Start Date:	Effective on Signature Date 25-Oct-2011
04 Counseling and Guidance	End Date:	
This service addresses the following goals:  (social emotional)	Service applies to:	<b>ESY</b>
	Frequency:	1
	Interval:	Weekly
	Minutes/Interval:	30
	Minutes/Interval (Pullout from Gen Ed):	0
	Service Delivery Model:	Direct Service (By a Single Provider)*
	Responsible Personnel:	Licensed/Credentialed Provider

**Compensatory DIS counseling service:**

The only difference is indication of Compensatory Service. No other aspects are changed. You must create an additional FAPE 2 service page for Compensatory Service.

	Start Date:	Effective on Signature Date 25-Oct-2011
04 Counseling and Guidance	End Date:	
This service addresses the following goals:  (social emotional)	Service applies to:	<b>Compensatory</b>
	Frequency:	1
	Interval:	Weekly
	Minutes/Interval:	30
	Minutes/Interval (Pullout from Gen Ed):	0
	Service Delivery Model:	Direct Service (By a Single Provider)*
	Responsible Personnel:	Licensed/Credentialed Provider

**GENERATE A PUPIL COUNSELING SERVICE RECORD**

Once the IEP is signed (activated), **FAPE Automation** creates a new service record for any services agreed to on the FAPE 2 including:

- additional weeks
- compensatory time

- ESY (inactive until student enrolls in ESY)
- Inactivates old service records
- Will not inactivate **additional weeks** or **compensatory** time which must be done manually once fulfilled
- For Amendment IEPs it will create new Service records and will copy all future pending events to new service record only if *interval* and *interval minutes* (duration) are the same as the original IEP

**Check the automatically generated record to be sure you are ASSIGNED. If not assign yourself by clicking on the box with three dots. If you are unable to do so contact your specialist**

The screenshot shows a form titled "Service Assignment Information". It includes fields for "Primary Provider" (with a three-dot menu icon and an "X" icon), "Alternate Location" (with a dropdown arrow), "Additional Provider" (with a three-dot menu icon and an "X" icon), "Service Location" (with a dropdown menu showing "20TH ST EL" and a red asterisk), and "From:" and "to:" date pickers. A checkbox at the bottom left is labeled "Served by an Unidentified Substitute".

**If there is a service record created for the active IEP, DO NOT create another one. Please contact your specialist**

- Click on Services on Record Navigator on left side
- Click New
- Select a Service: click Pupil counseling or ERICS as appropriate
- Input details that match FAPE 2 service page
  - Input regular, ESY, or compensatory from drop down menu
  - Click on Recommendation Tab (confirm eligibility), this must be done before you can input any other information
  - Frequency (ex. 1x/week)
  - Duration (ex. 30 min/session)
  - Type of action: individual or group. When you input in group, a tab titled "groups" will appear at top. You can choose to add a student to an already established group by clicking on that tab. If you are considering seeing student in a group choose "group direct service" otherwise student will not appear on list of participants to select from.
  - **Service Delivery Model:** Direct
  - **Service Status:** Active
  - Save

Pupil Counseling Save Print

Details
Recommendation
Goals
Events/Referrals/Notes
IEP
IEP Goal Documents

Service Details

Automatically Created by IEP Initial 24-SEP-18

Duration: From **24-SEP-18** To:

Type	Frequency	Time
IEP Service Prescription	1 x/ Weekly	Regular Minutes - 30 Pullout Minutes - 30
Individual Direct Service	x/	Minutes Per
Individual Indirect Service	x/	Minutes Per
Group Direct Service	x/	Minutes Per

Assistive Tech Required:       Transp. Needed:  Total (Roundtrip) Mileage: mile(s)

Service Delivery Model: Direct Service By a Single Provider      Diagnosis (ICD):

Confidential: Confidential \*      Included in the IEP?



Tip: This date is the day the IEP is signed. For Amendment IEPs the counseling goal would continue to follow the timeline of the original IEP, unless the Amendment was specifically to address counseling service

### Scheduling Sessions to avoid being out of compliance with IEP

Services must be provided on a regular interval, therefore, pre-scheduling your session is required in order to ensure compliance \*except in special cases approved by your specialist. Under normal circumstances you would have a regular appointment time for your students (ex: Mondays at 1:00pm); this promotes stability and predictability for the student and the teachers.

### Scheduling Individual Sessions

- Select "My caseload" under Welligent box on top right

My Caseload Welcome b [redacted] | St

Active Caseload f [redacted] New Session Note Print Refresh

Search Criteria

Caseload View:  Service List  Program List  Agency Case Manager  Detail  Alerts

Context\*:  Clinician  Supervisor (\*Only Applies to Service List and Program List Views)

Last Name:

Location: 20TH ST EL

Edit	New	Student	Phone	Service	Notes	Start Date	End Date	# Sched	# Compl	# Cancel	Last Date	Alert Level
		[redacted]	[redacted]	Pupil Counseling (20th St El)		24-Sep-2018		0	8	0	16-Nov-2018	<span style="background-color: green; color: white; padding: 2px;">OK</span>
		[redacted]	[redacted]	Pupil Counseling (20th St El)		07-Sep-2018		0	1	0	16-Nov-2018	<span style="background-color: green; color: white; padding: 2px;">OK</span>
		[redacted]	[redacted]	Pupil Counseling (20th St El)		20-Aug-2018		2	11	1	16-Nov-2018	<span style="background-color: green; color: white; padding: 2px;">OK</span>
		[redacted]	[redacted]	Pupil Counseling (20th St El)		04-Jun-2018		2	14	0	08-Nov-2018	<span style="background-color: green; color: white; padding: 2px;">OK</span>

- Open student record by clicking on pencil icon

- Click Events/Referrals/Notes

Pupil Counseling Save Print

Details Recommendation Goals Events/Referrals/Notes IEP IEP Goal Documents

Refresh Scheduler Recurrence Delete Incomplete Events

Item	Total	Description	Date	New
Events	8	(Session Notes:8 Completed, 0 Pending, 0 Cancelled)	16-Nov-2018	+
Forms/Referrals	0	Forms and Referrals for this individual	--	+
Case Notes	0	Generalized case notes related to this individual's encounter.	--	+
Messages	0	Internal messages, reminders and alerts created in Welligent related to this encounter	--	+
Attached Documents	0	Electronic files attached to this event as related/considered documentation.	--	+

- Click on Recurrence
- Input start time, session length, primary action, recurrence pattern, then save. (Be sure this information matches FAPE 2 page information.)

Start Date:  End Date:

**Range of Recurrence**

Schedule Date:   End By:

Exclude holidays and off-days  End After:  occurrence(s)

Schedule Events in the Past  End After:  hour(s) scheduled

**Appointment Time**

Start Time:  (Ex. 11:15am)

Session Length:  minutes

Primary Action:

**Recurrence Pattern**

Daily  Weekly  Monthly  Quarterly  Yearly

Recur every  week(s) on:

Monday through Friday

Monday  Tuesday  Wednesday  Thursday

Friday  Saturday  Sunday

- Notice Session notes, there will be sessions labeled “pending”

Pupil Counseling Save Print

Details Recommendation Goals Events/Referrals/Notes IEP IEP Goal Documents

Refresh Scheduler Recurrence Delete Incomplete Events

Item	Total	Description	Date	New
Events	14	(Session Notes:11 Completed, 2 Pending, 1 Cancelled)	29-Nov-2018	+

## Scheduling Group Sessions

- Click on Welligent on top right
- click Group Sessions
- Click new
- Input group data
  - Type (ERICs, pupil counseling)
  - Group name
  - Start and End Dates (these are not the IEP dates, may be a school year or a few months)
  - Frequency (ex: 1x/week)
  - Location where service is going to be delivered, then save – location should be “school”

Group Details - older kids Save Delete Copy Reports » Close

1 - Enter Details 2 - Specify Group Goal 3 - Add/Manage Participants 4 - Schedule Sessions 5 - Document Sessions

Group Type: Pupil Counseling \*  Limit Participants by Service Type

Group Name: older kids \*

Start Date: 24-AUG-2018  \*

Frequency: 1 x/ Weekly  Duration: 30 (Minutes)

Group Min/Max Participants: Min -  Max -

Location: 20TH ST EL  \*

Associated Program:   Limit Participants by Program

Default Primary Action: Group  \*

Group Status: Active

End Date: 30-NOV-2018  \*

Service Provider:

Additional Provider:

Unit:

Place of Service: School

- Click on add/manage participants
- Click on Add participant
- Click on student you want to add and click enroll
- Click schedule sessions, select day, time, click button “schedule” then save

Group Details - older kids Save Delete Copy Reports » Close

1 - Enter Details 2 - Specify Group Goal 3 - Add/Manage Participants 4 - Schedule Sessions 5 - Document Sessions

Group Schedule Provider Schedule Delete Sessions

Scheduler Actions							
	Day of the Week	Session Time	None	Schedule	Delete	Reschedule	Reschedule Time
<input type="checkbox"/>	Monday	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/>	Tuesday	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/>	Wednesday	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Thursday	01:00pm	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/>	Friday	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/>	Saturday	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
<input type="checkbox"/>	Sunday	<input type="text"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

\*All participants should be added prior to scheduling or rescheduling sessions. To schedule sessions select the day of the week and the session time. Then click the "Schedule" radio button for each day that you want to schedule and click "Save" to build the schedule.

## DOCUMENTING COUNSELING SESSIONS – What to Document & Welligent Procedures

Once the IEP is activated, you must begin providing services. Be mindful that DIS services are owed for the week that the IEP is signed (even if the IEP is signed Friday at 4:00 p.m.)

What to Document: Counseling session activities and progress must be related to and indicate progress towards the IEP goal. Documentation of counseling sessions must address three areas:

ACTIVITY RELATED TO IEP GOAL: – a brief description of the activity – activities should be relevant to the goal

RESPONSE TO ACTIVITY: – an outcome statement (what happened; how did the student respond)

PROGRESS TOWARDS IEP GOAL: – an objective measure or professional reflection of the individual student's response to the activity and progress towards the goal

Documentation should be in a narrative form, full sentences, 2-5 sentences in length,

### **Input session results for Individual session**

For scheduled sessions:

- On My Desktop Wellgent page, on the right under "Today at a Glance" your scheduled sessions will be listed. Click on icon to the left of student name

**OR**

- Go to Wellgent on top right
  - Click on "My Caseload"
  - select student record
  - click on Events/Referrals/Notes
  - find session from list of pending sessions scheduled
  - Click on clipboard icon


For Individual session that are **NOT** scheduled:

- Go to Wellgent on top right
  - Click on "My Caseload"
  - select student record
  - click on Events/Referrals/Notes
  - click on green plus sign (+) on right side

Input information to record:

- Mark Completed from drop down
- Time in/ Time out, Service delivery (direct)-may be filled automatically
- Encounter type (individual/ group)
- Place of service (school)
- Provider E-signature


## Event Schedule


Date of Service: 16-NOV-2018  \*



Scheduled/Start Time: 10:51am \*


Appointment Duration: 60 (Minutes)



Other Time: (Minutes)

Time In: 09:00am 



Time Out: 10:00am 

Provider:  

Alternate Provider:  


Status: Completed  


Provider E-signature: **Signed**


Encounter Type: Group   \*

Makeup Time (Minutes):

Telephone?

Service Location (Billing Location): 20TH ST EL 

Place of Service: School 

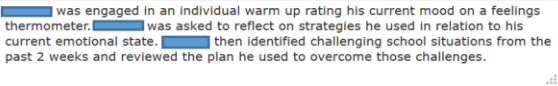

Service Delivery Model: Direct Service (By a Single Provider) 

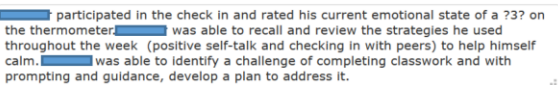

- Click on “Enter Notes” tab at the top
  - Input Activity Related to the IEP Goal (activity may be the same for group sessions)
  - Input Response to Activity (the individual student’s response/participation in the session)
  - Input Progress Towards IEP Goal (should be measurable progress)
 (for additional information on session documentation, refer to the Psychological Services Webpage – IQAR PDs)

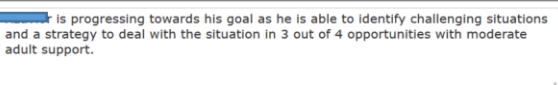

View/Enter Appointment Details Enter Notes Approval/Signatures

Pupil Counseling

Activities/Services

ACTIVITY RELATED TO IEP GOAL:    
 \*  
 4000 Characters Left

RESPONSE TO ACTIVITY:    
 \*  
 4000 Characters Left

PROGRESS TOWARDS IEP GOAL:    
 \*  
 4000 Characters Left

**Input session results for Group session:**

- Click on Welligent at top right
- Click on Group Sessions
- Select Location and Refresh
- Select on group by clicking on students icon on left of group name

- Click on document sessions
- Select date

Schl. Psychological Svcs.

ELLPROVIDER | EDUCATION | REPORTS

Group Sessions | 1 - Student Search | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search | Empty All

Group Details - boys 1

1 - Enter Details | 2 - Specify Group Goal | 3 - Add/Manage Participants | 4 - Schedule Sessions | 5 - Document Sessions

Session Date	# Pending	# Cancelled	# Completed	# Part	Delete Session?
<b>Completed</b>					
11-Sep-2013 11:00am	0	1	2	3	
03-Sep-2013 11:00am	0	1	2	3	
27-Aug-2013 11:00am	0	0	3	3	
<b>Cancelled</b>					
10-Sep-2013 11:00am	0	2	0	2	
<b>Pending</b>					
17-Sep-2013 11:00am	2	0	0	2	
24-Sep-2013 11:00am	2	0	0	2	
01-Oct-2013 11:00am	2	0	0	2	

Note: This record was last modified by Jimena Del Pozo on Wednesday September 04, 2013 at 09:22 am

- Input information to record:
  - Completed session (or other as needed from drop down)
  - Time in/ Time out
  - Service delivery (direct)-may be filled automatically
  - Place of service (school)-optional
  - Group session activities
  - Click on propagate activities

**Participants**

There are 3 participants in this session. Participants 1 through 96 are displaying

#	Participant	Student ID	Session Status	Primary Action	Program	Diagnosis
1	[Redacted]	[Redacted]	Completed	Group SAT: Regular	Specific Learning Disability	
2	[Redacted]	[Redacted]	Cancelled: Student Absent (SA)	Group SAT: Regular	General Education	
3	[Redacted]	[Redacted]	Completed	Group SAT: Regular	Specific Learning Disability	

- Select each individual student by clicking on plus sign on left of name
- Input specific session results (use Counseling Template Excel document)
- Click on minus sign on left of name to close record
- Save

## MAKING UP CANCELLED/RESCHEDULED COUNSELING SESSIONS

- Provider is not required to make up sessions when session is cancelled due to:

Student Absence, No Show, Refuse Treatment

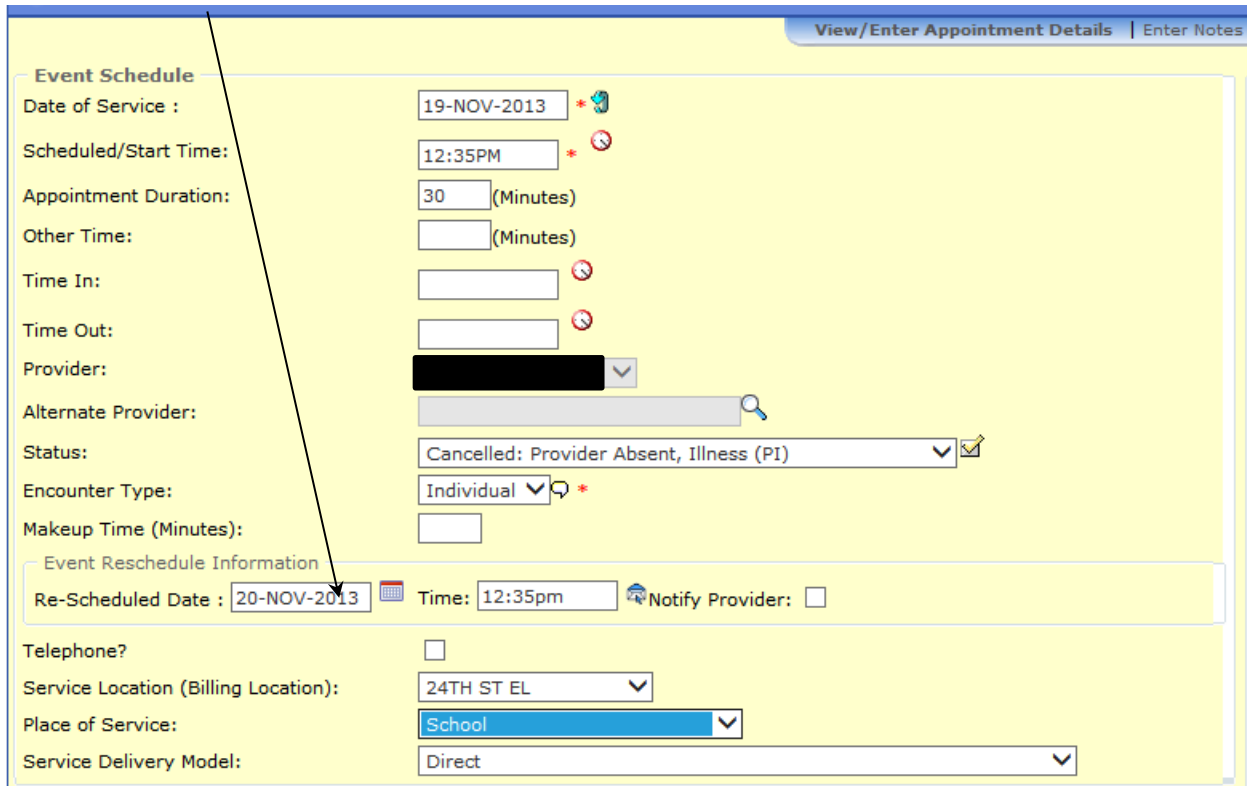
Rule of Thumb: Under most circumstances, we are responsible for making up any sessions unless the student is not at school or refuses to see us..

- Provider must make up sessions when the provider is absent for any personal or professional reason: (ex. illness, jury duty, personal necessity, staff or an IEP meeting, professional development).
- MAKING UP SESSIONS: When making up a session do not exceed minutes/interval rather create a new session (ex: do not provide 60/session, rather create two sessions of 30 minutes each, even if the service was provided consecutively- one session 11:00am-11:30am, another from 11:30am-12:00pm)
- MAKE UP TIME - ADDING MINUTES TO SESSIONS: If time extra time is being provided in a session to make up for time owed, providers should document the total duration/total minutes in the "Appointment

Duration” field. Any portion of the session that is make-up time should be documented in the field “Makeup Time”. (refer to Outcome 13, 9/2018 PD on the Psychological Services webpage for more information)

### How to Generate a Service Record for Make-Up Sessions

- Open student’s service record to date of service
- Select appropriate descriptor of “Status” from drop down menu. Once you do this, a section appears “event reschedule information” appears.
- Input reschedule date and time and place of service (school)
- Save and a new record will be generated and scheduled



**View/Enter Appointment Details | Enter Notes**

**Event Schedule**

Date of Service : 19-NOV-2013

Scheduled/Start Time: 12:35PM

Appointment Duration: 30 (Minutes)

Other Time: (Minutes)

Time In:

Time Out:

Provider:

Alternate Provider:

Status: Cancelled: Provider Absent, Illness (PI)

Encounter Type: Individual

Makeup Time (Minutes):

**Event Reschedule Information**

Re-Scheduled Date : 20-NOV-2013 Time: 12:35pm Notify Provider:

Telephone?


Service Location (Billing Location): 24TH ST EL

Place of Service: School

Service Delivery Model: Direct

## Making up Multiple Sessions:

This may be used in a situation where the provider is assigned to a school that has been uncovered for an extended period of time.

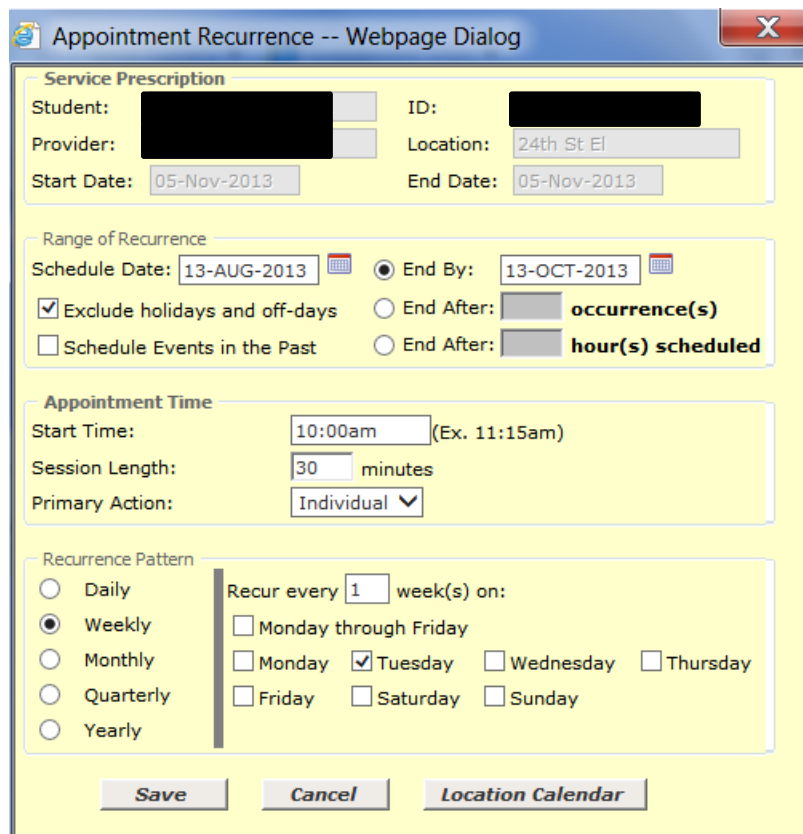
 Rule of thumb: this method is recommended if you have three or more sessions to make up.

Student record has “pending” sessions

- Make a note of how many sessions are pending
- Go to Wellprovider on top left
  - Click on “My Caseload”
  - select student record
  - click on Events/Referrals/Notes
  - click on “Delete Incomplete Events”-delete events

If student does not have pending session begin here:

- Click on Recurrence
- Input date range that you estimate will be required to deliver the make up sessions (need to make up 8 missed sessions of 30min/week, input range for 8 weeks- 8/13/13-10/13/13).
  - ✓ Tip: Be sure to provide service at the interval indicated on IEP (weekly, monthly). SER 310 % will be elevated, be sure to annotate for your specialist.
- Input start time, session length, primary action, recurrence pattern, then save.



Appointment Recurrence -- Webpage Dialog

**Service Prescription**

Student: [redacted] ID: [redacted]  
Provider: [redacted] Location: 24th St El  
Start Date: 05-Nov-2013 End Date: 05-Nov-2013

Range of Recurrence

Schedule Date: 13-AUG-2013  End By: 13-OCT-2013  
 Exclude holidays and off-days  End After: [redacted] **occurrence(s)**  
 Schedule Events in the Past  End After: [redacted] **hour(s) scheduled**

Appointment Time

Start Time: 10:00am (Ex. 11:15am)  
Session Length: 30 minutes  
Primary Action: Individual

Recurrence Pattern

Daily  Weekly  Monthly  Quarterly  Yearly

Recur every 1 week(s) on:  
 Monday through Friday  
 Monday  Tuesday  Wednesday  Thursday  
 Friday  Saturday  Sunday

Save Cancel Location Calendar

## IEP GOAL Report – Generating a Report with All GOALS for a school site

*Easy steps to create a document with all student counseling goals for a school site on one Excel sheet*

1. Search using the Report Category or Input the Report ID 2845 (if you like the report you can add it to your hotlist)
2. In Location select your school
3. Download as an Excel file

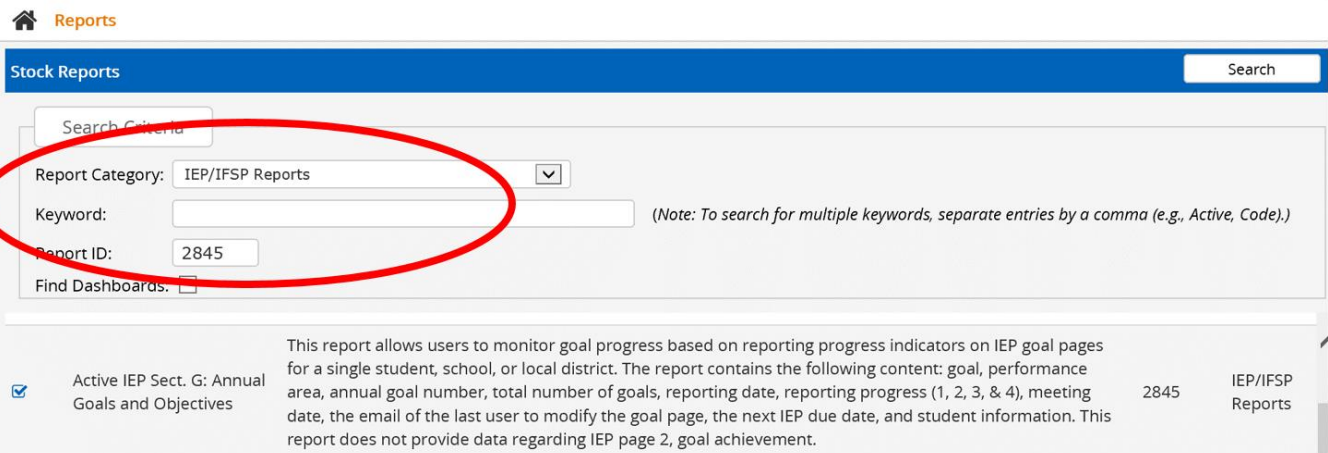
This will give you an Excel sheet with all of the student's IEP goals. You will need to set up a filter so that you can look at the counseling goals only. In the upper tabs on the Excel Spreadsheet go to the tab marked HOME

The Office Expert - Apply a Filter to a Spreadsheet in Excel

<https://www.youtube.com/watch?v=Pfku-csUD4U>

3. Once you have filtered for Social Emotional (if goals are not named social emotional you may have to choose Social Emotional, Counseling etc.) then the document will pull up all social **emotional goals**.

1. Search using the Report Category or Input the Report ID 2845



The screenshot shows a web interface for 'Reports'. At the top, there is a 'Stock Reports' header with a search button. Below this is a search criteria section with a red circle highlighting the 'Report Category' dropdown menu, which is set to 'IEP/IFSP Reports'. Other fields include 'Keyword' (empty), 'Report ID' (2845), and 'Find Dashboards' (checkbox). A note states: '(Note: To search for multiple keywords, separate entries by a comma (e.g., Active, Code).)'. Below the search criteria is a table of reports.

Report Category	Description	Report ID	Report Name
<input checked="" type="checkbox"/>	Active IEP Sect. G: Annual Goals and Objectives	2845	IEP/IFSP Reports

This report allows users to monitor goal progress based on reporting progress indicators on IEP goal pages for a single student, school, or local district. The report contains the following content: goal, performance area, annual goal number, total number of goals, reporting date, reporting progress (1, 2, 3, & 4), meeting date, the email of the last user to modify the goal page, the next IEP due date, and student information. This report does not provide data regarding IEP page 2, goal achievement.

2. In Location select your school and 3. Excel (if you like the report you can add it to your hotlist)

**Reports**

Active IEP Sect. G: Annual Goals and Objectives(2845)  
IEP/IFSP Reports

Schedule Run **Excel** **(+) Hot List** Reset Close

Report Engine: Print Listing  
Report Description: This report allows users to monitor goal progress based on reporting progress indicators on IEP goal pages for a single student, school, or local district. The report contains the following content: goal, performance area, annual goal number, total number of goals, reporting date, reporting progress (1, 2, 3, & 4), meeting date, the email of the last user to modify the goal page, the next IEP due date, and student information. This report does not provide data regarding IEP page 2, goal achievement.

---

**Filter**      **Value**

District: All Districts

Location: All Locations

Select your school

This will give you an Excel sheet with all of the student's IEP goals. You will need to set up a filter so that you can look at the counseling goals only. In the upper tabs on the Excel Spreadsheet go to the tab marked HOME

First Name	Meeting Date	Next IEP Date	Performance Area	Annual_Goal_#	Total # of Goals	Goal	Reporting1_Date	Reporting1_Progress	Reporting2_date	Reporting2_Progress
ALEXANDER	13-Mar-18	13-Mar-19	Social Emotional Dev	1	10	Xander will respond to others comments in a series of at least 2 exchanges, on 4 opportunities, during the school day.	1-Jun-18	Y		
RILEY	2-May-18	2-May-19	Social Emotional	7	8	Riley will initiate an interaction with a peer and maintain the interaction over three verbal or non-verbal exchanges, in 3 out of 5 opportunities.				
RILEY	2-May-18	2-May-19	Social emotional	8	8	Riley will independently use real objects in pretend play on 4 occasions during a school week.				
BOLURIN	27-Aug-18	7-Aug-19	Soc. Emotional Dev.	NO GOAL NUMBER INPUT	9	The student will enter a group of children and play cooperatively for at lease 20 minutes, on four occasions during a school week.				

# Welligent Reports – Creating a Hotlist

A hotlist is a shortcut that allows you to easily access the reports you run on a regular basis

1. Select the report 2. Click on “(+)Hotlist” 3. Refresh
4. To remove, click on report, and the parenthesis will be negative (-)Hotlist when you click on Hotlist it will now remove the report from your list

The image shows two screenshots from the Welligent Reports interface. The left screenshot displays the details for a report titled "SEK300(A) -- Service Delivery Report YTD w/ Adjusted Target (Single Provider) (2542)". The "Hotlist" button is highlighted with a red box. The right screenshot shows the "WellReports Desktop" interface with a "My Report Hotlist" section. The first item in the hotlist, "Stsmgmt-Ser300g(A) -- Service Delivery Report With Adjusted Target (Year To Date)", is also highlighted with a red box.

## APPENDIX B

### PSYCHO-EDUCATIONAL ASSESSMENTS: HOW RATING SCALES POTENTIALLY INFORM SEL

Areas of concern for any given student need to be identified by integrating multiple sources of information, however below are possible correlations between the domains of Social Emotional Learning and some of the more commonly used standardized questionnaires. This list is not intended to be exhaustive.

<b>SELF AWARENESS</b>	

**BASC 3 Self Report**-Anxiety, Attention, Depression, Locus of Control, Sensation Seeking, Sense of Inadequacy, Somatization, Self-Esteem, Self-Reliance, Relations with Parents.

**BASC 3 Teacher** - Anxiety, Depression, Somatization, Attention Problems, Learning Problems Atypicality

**BASC 3 Parent** - Anxiety, Depression, Somatization, Attention Problems, Learning Problems Atypicality

**Conner's 3**-Hyperactivity, Impulsivity, Executive Functioning, Inattention, Learning Problems

**CARS 2**-Relating to People, Imitation, Emotional Response, Body Use, Object Use, Adaptation to Change, Visual Response, Listening, Response to Taste, Smell and Touch Response and Use, Fear of Nervousness, Verbal Communication/Nonverbal communication.

**ASRS, ASDS**: Language, Social, Maladaptive, Cognitive Sensorimotor.

**Children's Depressive Inventory 2 (CDI 2)**- Emotional Problems, Negative Mood/Physical Symptoms, Negative Self-Esteem, Functional Problems, Ineffectiveness, Interpersonal Problems

**Anger Regulation And Expression Scale (ARES)**-Internalizing Anger Cluster: Arousal, Physiological Arousal, Cognitive Arousal, Rejection, Anger-in, Bitterness, Resentment, Suspiciousness

**Piers Harris 2-Behavior**, Intellectual and School Status, Physical Appearance and Attributes, Freedom from Anxiety, Popularity, Happiness and Satisfaction

<b>SELF MANAGEMENT</b>	

**BASC 3 Self Report**-Anxiety, Attention, Atypicality, Hyperactivity, Attention Problems

**BASC 3 Teacher** - Hyperactivity, Aggression, Conduct Problems, Atypicality, Adaptability

**BASC 3 Parent** - Hyperactivity, Aggression, Conduct Problems, Atypicality, Adaptability, Activities of Daily Living

**Conner's 3** - Hyperactivity, Impulsivity, Executive Functioning, Inattention, Learning Problems

**Achenbach (Teacher)**-Anxious/Depressed, Somatic Complaints, Social Problems, Thought Problems, Attention Problems, Rule Breaking Behavior, Aggressive Behavior

**CARS 2**-Relating to People, Imitation, Emotional Response, Body Use, Object Use, Adaptation to Change, Visual Response, Listening, Response to Taste, Smell and Touch Response and Use, Fear of Nervousness, Verbal Communication/Nonverbal communication.

**ASRS, ASDS**: Language, Social, Maladaptive, Cognitive Sensorimotor.

**Anger Regulation And Expression Scale (ARES)**-Externalizing Anger Cluster: Overt Aggression/Expression, Physical Aggression, Verbal Expression, Covert Aggression, Revenge, Subversion, Relational Aggression, Passion Aggression, Bullying, Impulsivity

**ADHDT-2** Hyperactivity, Impulsivity, and Inattention

	<b>SOCIAL AWARENESS</b>

**BASC 3 Self Report** - Attitude Towards Teachers, Attitude Towards School, Locus of Control, Social Stress, Interpersonal Relationships, Relations with Parents.

**BASC 3 Teacher** - Atypicality, Withdrawal

**BASC 3 Parent** - Atypicality, Withdrawal

**Conner’s 3** – Peer Relations, Family Relations

**Achenbach (Teacher)** - Anxious/Depressed, Somatic Complaints, Social Problems, Thought Problems, Attention Problems, Rule Breaking Behavior, Aggressive Behavior

**CARS 2** - Relating to People, Imitation, Emotional Response, Body Use, Object Use, Adaptation to Change, Visual Response, Listening, Response to Taste, Smell and Touch Response and Use, Fear of Nervousness, Verbal Communication/Nonverbal communication

**ASRS, ASDS** - Language, Social, Maladaptive, Cognitive Sensorimotor

	<b>SOCIAL MANAGEMENT</b>

**BASC 3 Self Report**- Attitude Towards Teachers, Social Stress, Relations with Parents, Self-Reliance

**BASC 3 Teacher** Conduct Problems, Atypicality, Withdrawal, Functional Communication, Leadership, Social Skills, Study Skills

**BASC 3 Parent**

**Conner’s 3** - Peer Relations, Family Relations, Aggression/Defiance

**Achenbach (teacher & parent)** - Anxious/Depressed, Withdrawn/Depression, Somatic Complaints, Social Problems, Thought Problems, Attention Problems, Rule Breaking Behavior, Aggressive Behavior

**CARS 2** - Relating to People, Imitation, Emotional Response, Body Use, Object Use, Adaptation to Change, Visual Response, Listening, Response to Taste, Smell and Touch Response and Use, Fear of Nervousness, Verbal Communication/Nonverbal communication

**ASRS, ASDS** - Language, Social, Maladaptive, Cognitive Sensorimotor

**CDI 2 (Parent)** - Emotional Problems, Functional Problems

**CDI 2 (Teacher)** - Emotional Problems, Functional Problems

**Anger Regulation And Expression Scale (ARES)** - Externalizing Anger Cluster: Overt Aggression/Expression, Physical Aggression, Verbal Expression, Covert Aggression, Revenge, Subversion, Relational Aggression, Passion Aggression, Bullying, Impulsivity

\* CARS2, Achenbach, ASRS, ASDS Scales are categorical only, not an item analysis.

## APPENDIX C

### MTSS Social Emotional Support

<b>Factor</b>	<b>MTSS Social Emotional Support</b>		
<b>Organizational</b>	<b>Tier 1</b>	<b>Tier 2</b>	<b>Tier 3</b>
<b>Time/Frequency</b>	Approximately 30 minutes weekly of direct instruction – daily review	Approximately 30 minutes, 2-3 days/week (may include 1x Tier 1/Tier 2)	Approximately 45–60 minutes, 3-5 days/week
<b>Instructional grouping</b>	Whole class/school	Small group in class or intervention group	Small group with individual check-in
<b>Duration of intervention</b>	Throughout the school year	8–15 weeks	20+ weeks
<b>Who facilitates</b>	General education teacher, administration & support staff	General education teacher, intervention team member (per site staffing)	Intervention team member, counselor, school psychologist, PSW (per site staffing)
<b>Assessment Factors</b>	<b>Tier 1</b>	<b>Tier 2</b>	<b>Tier 3</b>
<b>Level of identifying student need</b>	School Experience Survey, School discipline referrals, SSPT, etc.	Group assessment and individual progress monitoring	Individual progress monitoring
<b>Intensity of progress monitoring</b>	Four to six times a year	Biweekly or monthly	Daily to weekly
<b>Assessment framework</b>	Data tied school goals and programs implemented	Group-level (if applicable), criterion assessment of skills targeted/program specific	Individual contracts, skill assessment
<b>Additional Factors</b>	<b>Tier 1</b>	<b>Tier 2</b>	<b>Tier 3</b>

<b>Types of Interventions</b>	School-wide Positive Behavior Expectations, Classroom expectations, Reinforcement systems for positive behavior (caught being good, school assemblies). Explicit instruction: Direct instruction in social emotional skills – Second Step, Restorative Justice, Responsive Classrooms, Growth-mindset, Sanford Harmony	Establish if skill deficit or performance deficit (or both) – provide group and/individual support Performance deficit: Increase opportunity and reinforcement of behaviors, increase opportunities for positive interactions with adults Skill deficit: provide targeted review of skills taught in Tier 1, increase opportunities for supervised practice and pre-correction,	Similar to Tier 2 however individualized, targeted skills, more tailored to the individual student’s needs, more frequent intervention, adult monitoring and feedback.
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## **REFERENCES**

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Source: <http://www.specedlawsregs.org/default.aspx>

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Rutgers School-Based Social Emotional Learning Programs

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Illinois State Board of Education Social Emotional Learning Standards

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Anchorage School District Social and Emotional Learning Department <http://www.asdk12.org/depts/SEL/>

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Educating Hearts: A Districtwide Initiative to Teach How to Care

<http://www.edutopia.org/anchorage-social-emotional-learning-video>

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Stephanie M. Jones and Suzanne M. Bouffard

Harvard Graduate School of Education

[http://www.srcd.org/sites/default/files/documents/spr\\_264\\_final\\_2.pdf](http://www.srcd.org/sites/default/files/documents/spr_264_final_2.pdf)