HOW TO GET STARTED WITH GUIDANCE DIRECT

Logging in to Guidance Direct

To log in to the Guidance Direct website, an Agency ID, User Name and Password are required. As a new user, you will receive a welcome email with your login information. Simply go to www.guidancedirect.com and click on the **Counselor Login**. Then, enter your Agency ID, User Name and Password and click **Login**.

If you forget your password you can either click on the **I Forgot My Password** link, or you can contact the Guidance Direct help desk at 516-766-4448 or send an email to support@centrisgroup.com.

Navigating through Guidance Direct

All of the areas in Guidance Direct can be accessed using the Navigation Bar on the left hand side of the screen. The Navigation Bar is broken down into five separate sections: Communications, Information, College Planning, Events, and Student Site. Simply click on the area that you would like to access and you will be brought into that area. The Navigation Bar can be found on every screen within Guidance Direct, which allows you to access any area from anywhere within the system.

Message Forum

The online Message Forum provides you with a searchable knowledge base of topical questions and answers created by fellow school counselors and the Guidance Direct Forum Moderator. The Message Forum allows you to get answers to your questions related to school counseling from other school counselors and the research staff at Guidance Direct.

Viewing Messages in the Forum

- To view a list of messages in the forum, click on the **Message Forum** tab on the Navigation Bar. To view additional pages of message listings, use the **Next** and **Last** buttons at the bottom of the page.

- To view the complete details of an individual message (including the full questions and all the answers), click on the message subject**.**

- To view individual responses to the message, click on each response heading.

Searching the Message Forum

When you have a question that you want to post to the Message Forum, the first step is to check to see if the question has already been asked. In many cases you will find that the question and a number of excellent responses have already been posted to the forum. The Message Forum is a knowledge base of topical questions and answers. To search for questions and answers in the Message Forum, use the **Search by Subject** feature.

- In the **Search by Subject** box in the top left hand corner of the screen, type in the subject of your question and click search. It is best to use broad key word(s) in the **Search by Subject**. The **Search by Subject** will return a list of any matching Message Forum subjects. Then, simply click on the subject name to see the responses.

- You can also search for a message by the name of the user that posted the question. Simply type the individual's name in the **Search By Posted By** and click search. A list of subjects that the person posted will appear on the screen.

Posting a Message to the Forum

If your question has not already been asked in the Message Forum or if you need additional information, then you should post a new message to the forum. Forum Messages are posted in Guidance Direct and distributed by email.

- To post a message to the forum, click on the **Email Members** tab on the Navigation Bar.

- Depending on the nature of your question, you can choose to send an email to different groups of Guidance Direct members. For example, if you are seeking responses from members throughout the state, then you would select **Several Members**. Or if you are seeking responses to members in just your county, then you would select **One County**. You can send your question to:
  - One Member
  - Several Members
  - One County
  - Several Counties
  - One District
  - Several Districts
  - One BOCES District
  - Several BOCES Districts

- Select which group of members you would like to send your question to. For example, if you wanted to send your message to all members of Guidance Direct, click on **Several Members**.

- Then, to select all members click on **All Members** from the "To Members" drop down box. Click the arrow button to move the selection over to the active box on the right.

- Select **Forum** under Post to Forum. Enter the subject of the question in the subject field, and enter the complete question in the message text box. A spell checker is provided for your convenience. You also have the option of adding an attachment. Then, click **Continue.**

- To send the message, click **Send Email**, and your message will be posted to the Forum and sent to the selected members of Guidance Direct.

- To view responses to your question, simply click on the **Message Forum** tab and click on the subject of your question. Your question will appear and you can then click on the individual responses.

- All responses to the posting can be accessed by logging into Guidance Direct and clicking on the individual subject name for that Message Forum thread. Responses to the question do not get sent to members through the email system.

Posting a Reply to the Message Forum

If you are on the distribution list for a message, you will receive an email in your regular inbox. The email will include the question and link that is used for responding.

- If you would like to respond to the question, simply click on the link in the email which will open your browser and bring you to a Guidance Direct website login page.

- To post a reply to a message, click on the subject to enter the message thread.

- Click on the **Post a Reply** icon that is contained within the original question.

- Type your reply in the Message Body and click **Submit**.

Information Documents

The Information Documents area allows you to access an electronic library of New York State school counseling related requirements, SED documents, professional development information, and other documents related to various counseling topics.

Searching for Documents:

- To search and view documents, click on the **Documents** tab on the Navigation Bar.

- Documents can be sorted by "Category" or searched by "Document Title". To sort by category use the "Search By Document Category" dropdown. To search by title, enter a key word into the "Search by Document Title" search box. It is suggested that you keep your keywords as broad as possible to start.

Viewing Documents:

To view the document, click on the document name, or the View icon to the right of the document. Documents are either in Microsoft Word format or PDF format.

Publications

The Publications area has the same functionality as the Documents section which makes it easy for members to use. You can search for Publications by category.

Searching for Publication:

- Publications can be sorted by Category or searched by Document Title. To sort by Category use the Search By Publication Category dropdown. To search by title, enter a key word into the Search by Publication Title search box. It is suggested you keep your keywords as broad as possible to start.

Viewing Publications:

- To view the publication, click on the publication name, or the View icon to the right of the publication. Publications are either in Microsoft Word format or PDF format.

How Students Create Accounts in Career Connections

The Career Connections web site can be found through a "Student Login" link on the GuidanceDirect.com home page. Students and parents log in to Career Connections using a school ID and password that gets distributed to students by their counselor. Counselors can obtain the school ID and password from the "Admin of Student Site" section of Guidance Direct.

- The school ID and password that is obtained from the Counselor gets entered every time the student logs in.

- The <u>first time</u> students visit Career Connections, they will create their own personal account. First, click on the **Create New Account** button, and then complete the New User Account Form.

- Returning students simply enter their personal User Name and Password under **Existing Users** after they have entered the School ID and Password.

Admin of Student Site

The Administrative Area of Career Connections is used to manage student and school accounts, produce accountability reports, and set-up customized areas of the site. Only Guidance Direct members that have been authorized to have administrative privileges can access the Career Connections Administrative Area.

Members can access the Admin area by clicking on **Admin of Student Site** on the left hand navigation bar.

Our Students

The Our Students page allows you to review the career and college planning results and progress of your students. The students listed on the Our Students page have registered to use Guidance Direct Career Connections. Symbols appear in front of each student's name if they have completed the Interest Profiler; created a resume; or saved an occupation, college, or scholarship of interest in their portfolio.

Students' information can be searched by last name, by school, by year of graduation, by counselor's name, by grade/class or alphabetically. To search by name, type in the last name of the student that you would like to find and press "Go". You can also search for a group of students using the drop down filters. To view each page of students, click on the "Next" icon at the bottom of the page.

- To review the details on each student, click on the students name.

- Clicking on the student's name will bring you into the Career Portfolio which contains the information that the student saved. You can view or print any of the areas that the student has saved information to. You can also view a Portfolio Summary which contains a summary of the interest areas; a list of the matching occupations; the careers, colleges and scholarships that the student has saved; and the student's resume.