

## **Counselor Report**

Last Modified on 07/10/2025 2:21 pm CDT

Report Logic | Report Editor | Generate the Counselor Report

Tool Search: Counselor Report

The Counselor Report will print counselor information for students. To appear in this report, the staff member must be listed as a counselor in the District Assignment or in the Personnel Master, and the student must have an active enrollment.



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Counselor F	Report ☆
Counselor Report	
This report prints in	formation for students and their Counselors based on active Counselor Staff Te
Which students woul	d you like to include in the report?
<ul> <li>Grade</li> </ul>	All Students
O Ad Hoc Filter	
Enrollment Effective	Date 01/17/2022
Z Exclude student	ts without a counselor
Which counselors wor Counselor (Total: 3) Counseling Effectiv	uld you like to include in the report?         All Counselors         Staff, Amber         Staff, Ben         Staff, Camille         ve Date       01/17/2022
Group Options	Student Counselor
Report Format: PDF	
G	enerate Report
_	Counselor Report

See the <u>Student Information Reports</u> Tool Rights article for tool rights needed to generate this report.



## **Report Logic**

Counselors are marked as such on the District Assignment editor. Counselors are added to students using the <u>Fill Counselor Wizard</u>.

Counselor names can be set to display in the Student header if desired by setting the <u>Show</u> <u>Counselor in the Student Header</u> system preference to Yes.

## **Report Editor**

The following fields are available on the Counselor Report Editor.

Field	Description					
Grade	Selection indicates the student's Grade level of enrollment.					
Ad hoc Filter	Students can also be included in the report by choosing an ad hoc filter instead of a grade level.					
Enrollment Effective Date	Entered date (pre-populated with the current date) indicates the date on which the student's enrollment is active.					
Exclude students without a counselor	When selected, students who are not assigned a counselor will not be included in the report.					
<b>Counselor Selection</b>	Select which counselors to include on the report.					
Counseling Effective Date	Indicates the date (pre-populated with the current) when the counselor was assigned to the student.					
Group Options	Select how the report should be sorted - either by the Student name or the Counselor name.					
Report Format	The report can be generated in PDF or DOCX format.					

## **Generate the Counselor Report**

- 1. Select the students to include on the report by selecting a Grade level or an Ad hoc filter.
- 2. Enter the desired Enrollment Effective Date.
- 3. Determine if the report should include students who do not have a counselor and mark or remove the checkbox for **Exclude students without a counselor**.
- 4. Select the **Counselors** to include on the report.
- 5. Enter a Counseling Effective Date.
- 6. Determine how the report should be sorted by **Student** or **Counselor**.
- 7. Select the desired **Report Format**.
- 8. Click the Generate Report button. The report generates in the selected format.



2019-20 High School Generated on 09:04/2019 03:56:15 PM Page 1 of 45					Counselor Keport All Grades: Effective Date: 09/04/2019 Counseling Effective Date: 09/04/2019 Students: 1481 Counselors: 8			
Grade	Student (#)	Counselor	Start/En	d Date	Title	Work Phone	Cell Phone	Email
10	Student, Amanda (#123456)	Staff, Alice	08/20/20	18 -	Counselor			counselor_HS@school.com
10	Student, Ben (#234567)	Staff, Alice	08/20/20	18 -	Counselor			counselor_HS@school.com
10	Student, Charlotte (#345678)	Staff, Alice	08/28/20	18 -	Counselor		(612)888-8888	five.aaa@infinitecampus.com
10	Student, David (#456789)	Staff, Brian	08/20/20	18 -	Counselor			counselor_HS@school.com
10	Student, Eric (#567890)	Staff, Brian	08/20/20	18 -	Counselor			counselor_HS@school.com

Counselor Report, PDF Format