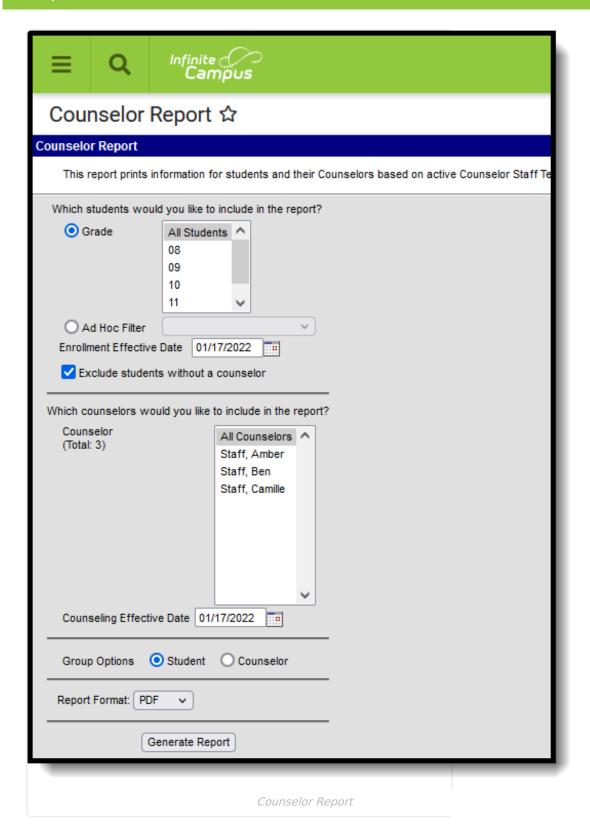# Counselor Report

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

Counselor Report

Report Logic

Counselors are marked as such on the District Assignment editor. If the district is using Campus Human Resources, a counselor is marked as such in the Personnel Master. Counselors are added to students using the Fill Counselor Wizard.

Counselor names can be set to display in the Student header if desired by setting the Show Counselor in the Student Header 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.
Counselor Selection	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.

Grade	Student (#)	Counselor	Start/End Date	Title	Work Phone	Cell Phone	Email
10	Student, Amanda (#123456)	Staff, Alice	08/20/2018 -	Counselor			counselor_HS@school.com
10	Student, Ben (#234567)	Staff, Alice	08/20/2018 -	Counselor			counselor_HS@school.com
10	Student, Charlotte (#345678)	Staff, Alice	08/28/2018 -	Counselor		(612)888-8888	five.aaa@infinitecampus.com
10	Student, David (#456789)	Staff, Brian	08/20/2018 -	Counselor			counselor_HS@school.com
10	Student, Eric (#567890)	Staff, Brian	08/20/2018 -	Counselor			counselor_HS@school.com

Counselor Report, PDF Format