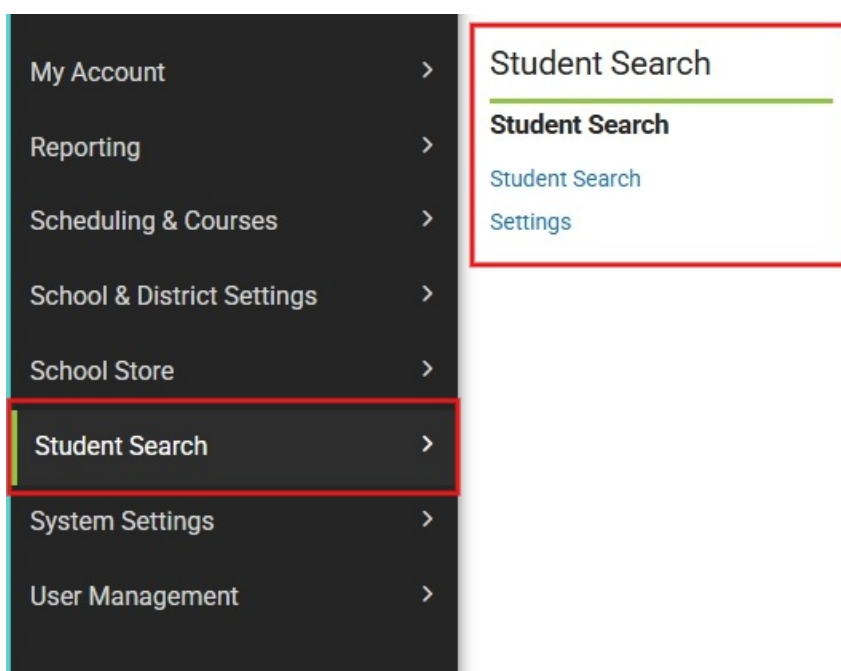


Advanced Person Search

10/24/2025 1:27 pm EDT

The Advanced Person Search allows users to search for person records using multiple criteria. The search feature allows the criteria to be saved and used as a template as well as saved and used in ad hoc reporting.



Tool Rights

Navigation: *User Management > User Groups > Tool Rights > Student Search*

Please note that settings control the filter options for all users with access to the Advanced Person Search. Access to the Settings portion of this tool should be limited. The Student Search portion of the tool is not limited by the users tool right access.

- ▼ Student Search
 - ▼ Student Search
 - Student Search
 - Settings

- | | | | | |
|------------------------------|--|---|---|---------------------------------|
| ☐ All | ☒ Read | ☒ Write | ☒ Add | ☐ Delete |
| ☐ All | ☒ Read | ☒ Write | ☒ Add | ☐ Delete |
| ☐ All | ☒ Read | ☒ Write | ☒ Add | ☐ Delete |
| ☐ All | ☒ Read | ☒ Write | ☒ Add | ☐ Delete |

Read and **Write** access allows users to filter and save filter templates in the tool or as ad hoc searches. Users will also be able to delete their saved filters.

Add access allows users to save filter templates as global templates for all users.

Delete access allows users to delete global filters.

Settings

Navigation: Student Search > Settings

Settings allow PSUs to determine which filter options are available for use in the Advanced Person Search. The On/Off options set the filter availability for all schools.

Settings

General Options >

Filter	On/Off
Student Number Text	On
Person ID Text	Off
State ID Text	Off
Active Student	On
Enr. Start Date	On
Enr. End Date	On
Start Status	On
End Status	On
End Action	On
Grade	

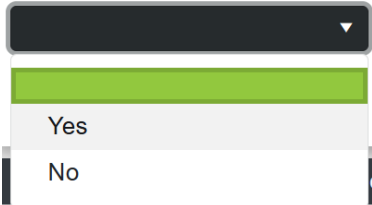
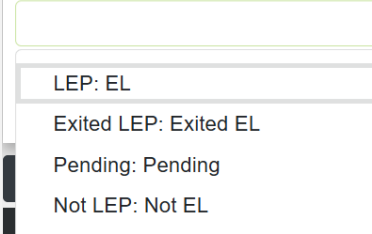
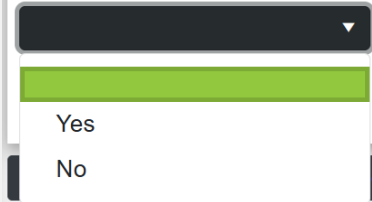
Below is a list of the filters with a brief description of the filter.

Filter	Description	
Student Number Text	Copy a list of student numbers from any source and paste into the student number box to create a list of student records. Student numbers can be in a list or comma separated format.	- Filter Student Number: 1234567891 1234567892
Person ID Text	Copy a list of person id numbers from any source and paste into the person id box to create a list of person records.	- Filter Person ID: 12345 123456

Filter	Description	
State ID Text	Copy a list of state id numbers from any source and paste into the state id box to create a list of students using the state id. Please note that for NC student number and state id are the same for all students.	- Filter State ID: 1234567891 1234567892
Active Student	Filters for active or inactive students by selecting Yes for active, No for inactive. As a reminder a student must have an enrollment in the calendar to be a student for that calendar year.	- Filter Active Student: Yes Yes No
Enr. Start Date	Enter an enrollment start date to list any student with an enrollment start date on or after this date.	- Filter Enr. Start Date: October 2025 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18
Enr. End Date	Enter an enrollment end date to list any student with an enrollment end date on or before this date.	- Filter Enr. End Date: October 2025 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18
Start Status	Select a start status to list all students with an enrollment containing that start status in the calendar context selected.	- Filter Start Status: E1: Init enroll - this year E2: Init enroll from non-NC Public School

Filter	Description	
End Status	Select an end status to list all students with an enrollment containing that end status. in the calendar context selected.	- Filter End Status: 1 item(s) selected × Stds-Atten RSTA: Retention-State Standards RT: Retained W1: Transfer Withdrawal W2: Early Leaver Withdrawal
End Action	Select an end action to select any student with an enrollment containing that end action in the calendar context selected.	- Filter End Action: D: Demote P: Promote R: Retain
Grade	Select a grade level to list all students in the grade level selected.	- Filter Grade Level: 1A KG 1 2
Sex	Select a sex to list all students with the selected sex.	- Filter Sex: Female Male
Race/Ethnicity	Select one or more race/ethnicity to list all students with the selected race/ethnicity.	- Filter Race/Ethnicity: Hispanic/Latino American Indian or Alaska Native Asian

Filter	Description	
Cohort	Selections are based on the graduation cohort value based on the graduation tool. Select one or more year to filter for all students with the selected cohort(s).	- Filter Cohort: 2021 2026 2025
Flag	Selections are based on available flags in the system. Select one or more flag to list the students that have at least one of the flags selected as of the date selected.	- Filter Flag:  - EC - EL
SPED Setting	Selections are based on the available data listed from the Exceptional Children (EC) Data Screen environmental setting field.  Data is based on sync data from ECATS and is not the authoritative source for EC information.	- Filter SPED Setting: REG: Regular-80% or more of the day with non-disabled peers RES: Resource-40% - 79% of the day with non-disabled peers
SPED Disability	Selections are based on the data listed from the Exceptional Children (EC) Data Screen primary disability field.  Data is based on sync data from ECATS and is not the authoritative source for EC information.	- Filter SPED Disability: AU: Autism

Filter	Description	
504	Select Yes or No to filter for students that have an active 504 program as of the date filtering. Selecting No will provide all students without an active 504 program as of the date filtering.	- Filter 504: 
LEP	Selections are based on the data listed from the English Learners (EL) program status. Selecting one or more of the available statuses' filters for all students with the selected program status as of the date filtering.	- Filter LEP Status: 
Gifted	Selections are based on the data listed from the Gifted program area of identification. Selecting one or more of the available options filters for all students with the selected area of identification as of the date filtering.	 This is currently being updated and will be available soon!
RTI	Select Yes or No to filter for students that have an active locked RTI plan as of the date filtering. Selecting No will list all students without an active locked RTI plan.	- Filter RTI: 
FRAM	Due to the privacy of this information it is not recommended to turn this filter item on.	
Homeless	Due to the privacy of this information it is not recommended to turn this filter item on.	



Please note that the filter options are not limited by user's tool rights. Any user group with the tool rights for the

Advanced Person Search will have the option to use any of the filters that are turned on. Students with matching criteria will return in and be available for selection. For example, if a user does not have access to see the 504-program information, but the 504 filter is turned on, users will be able to use the filter to select students with an active 504 program as of the date filtered. Please consider this when turning filter options on and off.

Person Search (Student Search)

Navigation: Student Search > Student Search



A Calendar must be selected in the context to use this tool.

- Select one or more of the search filters from the dropdown list.
 - Adding more than one filter option will serve as an "AND" search resulting in students that meet all criteria selected.
 - When the filter contains more than one value, the selection within the same filter item serves as an "OR" resulting in all students that meet any of the selected option within the individual filter.

The screenshot displays the 'Student Search' interface. At the top, there is a breadcrumb trail: 'Student Search > Student Search > Student Search'. Below this, the main header 'Student Search' is visible. On the left, there is a section titled '- Filter' with a table of search filters. The table has two columns: 'All' and 'Student'. The 'All' column contains a series of checkboxes, and the 'Student' column contains a series of checkboxes. The first row in the table is highlighted in green, and the number '1' is visible in the 'Student' column. To the right of the table, a dropdown menu is open, listing various search criteria: Student Number List, PersonID List, StateID List, Active Student, Enr. Start Date, Enr. End Date, Start Status, End Status, End Action, Grade Level, Sex, Race/Ethnicity, Cohort, Flag, SPED Setting, SPED Disability, and 504. On the far right, there is a search bar with a dropdown menu set to 'None', and buttons for 'Clear' and 'Filter'. Below the search bar, there is a table with a search icon and a filter icon. At the bottom right, a status bar indicates '1 - 823 of 823 items'.

- Once the filter and criteria are selected, click the **Filter** button to search for students matching the criteria selected.

Clear

Filter

Use the Filter button to search. Use the Clear button to clear the search results

- The table below the filter criteria will list students matching the criteria selected.

Student Search	Copy Selected Students	Filter(s): None	
All ☐	Student	Student Number	Grade

- The **filter** icon next to each column provides further filtering options.
- The Student and Grade columns provides a "Contains" option to enter text and filter for matching results.

Student	Student Number
	Show items with value that: Contains Filter Clear

- The filter icon next to Student number allows to filter further based on mathematical functions.

Student Number

Grade

Show items with value that:

- Is equal to
- Is not equal to
- Is greater than or equal to
- Is greater than

- Clicking on the column title will sort the results in ascending or descending order for the column selected.

Grade ↑

- Check the box next to **All** to select all the students in the results. Check the box next to the students to select if you do not want to select all.
- Once the boxes are checked for the students that should be included, click **Student Search** to make the selected students as the search results. The Search menu will automatically open with the selected students results.
- Navigate through the student list as needed.

Student Search

Copy Selected Students

All ☒

Student



Please note that selecting Copy Selected Students copies the Person ID number, not the student number.

None

None

[G] 504 Flag

- Use the **Save**



icon to save the filter as a template. Saving will save for the individual user.

- Enter the **Template Name** and click **Save**. Users also have the option to create the filter as an Ad Hoc. Selecting this option will allow the filter to be available in areas where Ad Hocs can be used, for the individual user.
- Users with the "Add" tool right for the student search will also have the option to create the filter as a **Global Template**. Global templates are available for any users that have access to the Advanced Person Tool.

A dialog box titled "Save Template" with a close button (X) in the top right corner. It contains a text input field labeled "Template name:". Below the input field are two checkboxes: "Create as global template:" and "Create as Ad Hoc:". A green "Save" button is located in the bottom right corner.

- When a filter has been saved for the user or globally, select the filter from the dropdown and select the folder icon to load the template.

A dropdown menu showing filter options. The current selection is "[G] 504 Flag". Below it, the options "None" and "[G] 504 Flag" are visible. A red arrow points to a folder icon (upward arrow) in the top right corner of the dropdown menu.

Click the **Delete** icon



to delete the template. Global templates can only be deleted by those with the corresponding tool rights.

Click the **Reset** icon

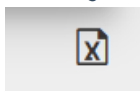


to reset the current template.

Use the **Clear** button to clear the existing results.

Two buttons: "Clear" and "Filter".

Selecting the **Excel** icon



will export the filtered list to an Excel file.



Since this is a new tool, there will be concerns we may not know. Please use the [Advanced Person Search Form](https://forms.gle/BGLkt7fsLTG6vipR8) to let us know of issues that you find.

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