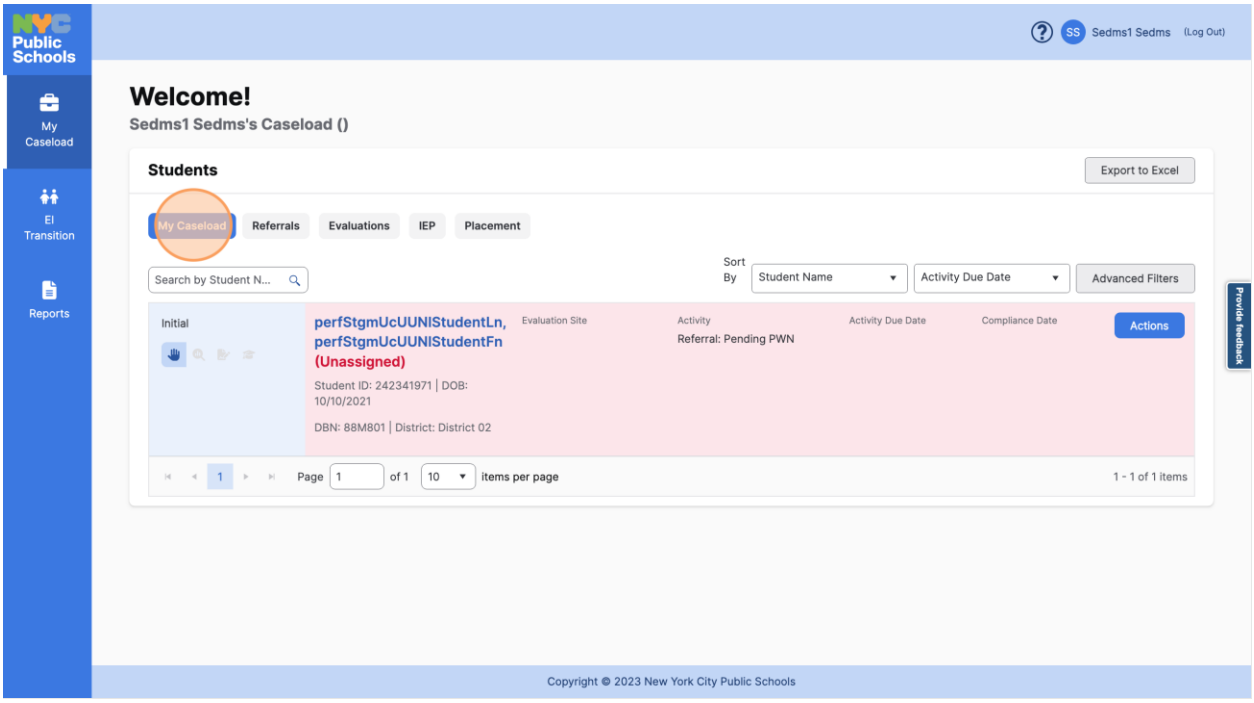
December 2024

How to Add a Student to a Caseload

This guide provides step-by-step instructions on how to add a student to your caseload or another user's caseload in ATLAS.

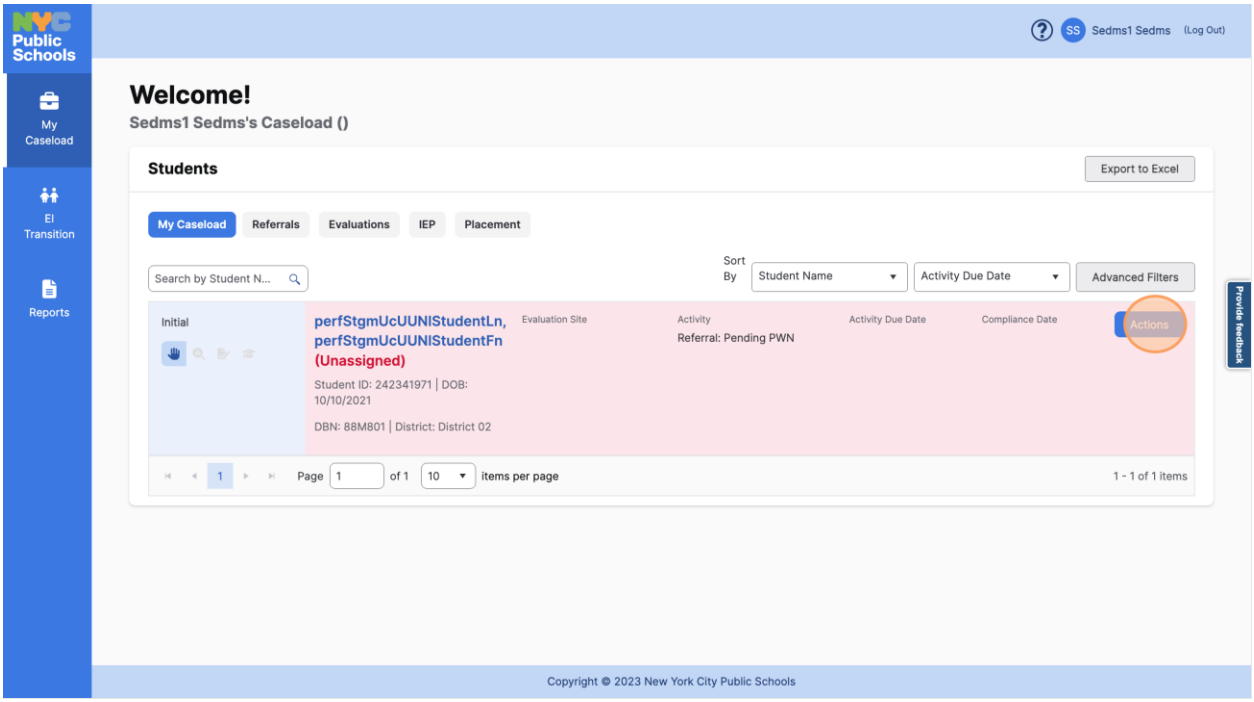
Note: *Student data included in this reference guide is entirely fictional and has been created for training and support purposes only. Any resemblance to actual students is purely coincidental.*

1. When you log into ATLAS, your dashboard will automatically display students who are currently on your caseload. The **My Caseload** button will be blue, indicating it's active, and only your assigned students are showing.

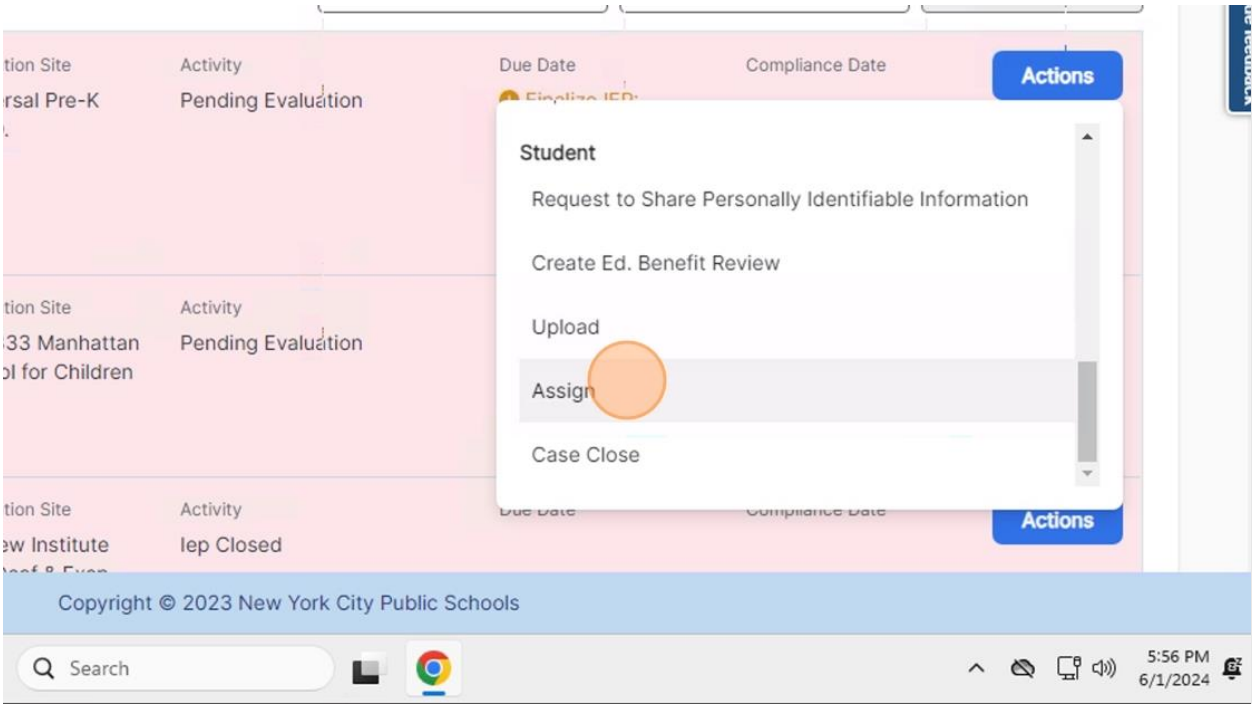


2. Students who are unassigned will appear at the top of the list, highlighted in pink, regardless of whether **My Caseload** is selected.

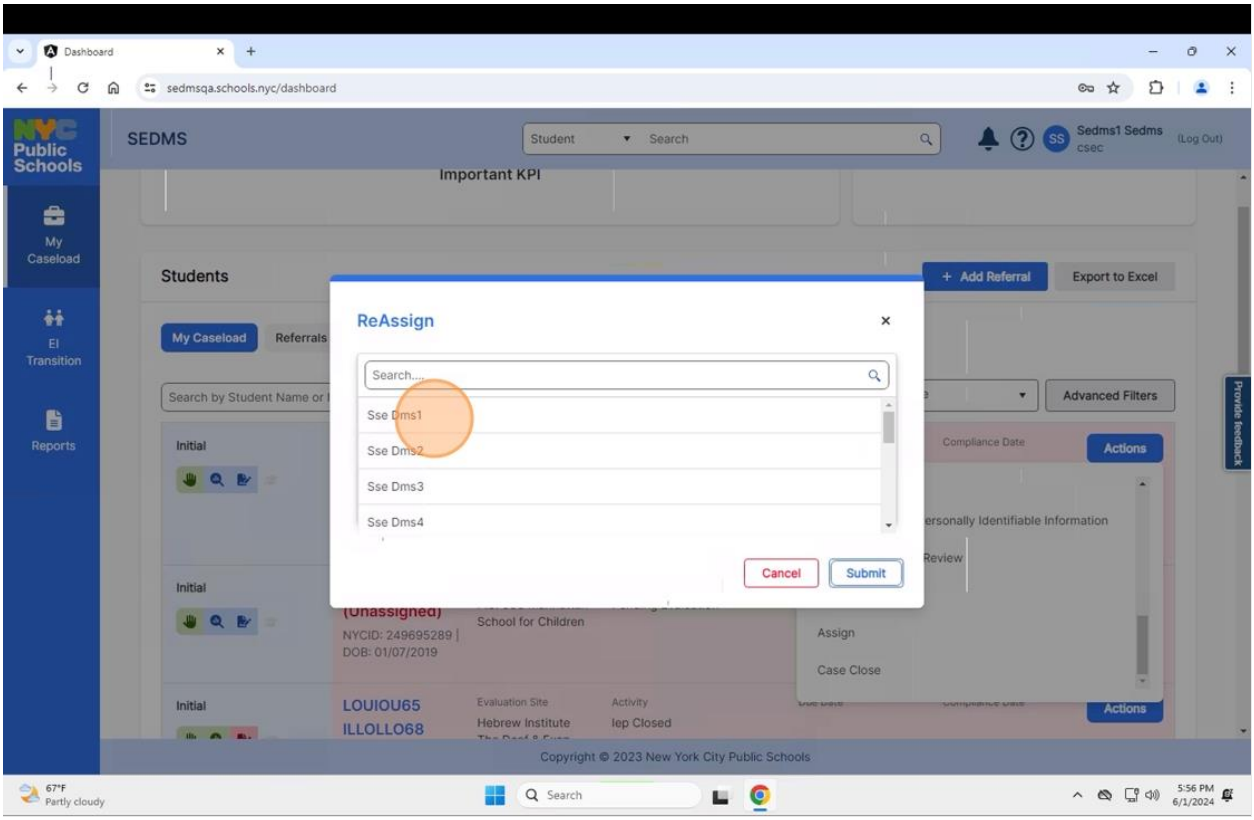
3. To assign a student, click the **Actions** button next to the student's record.



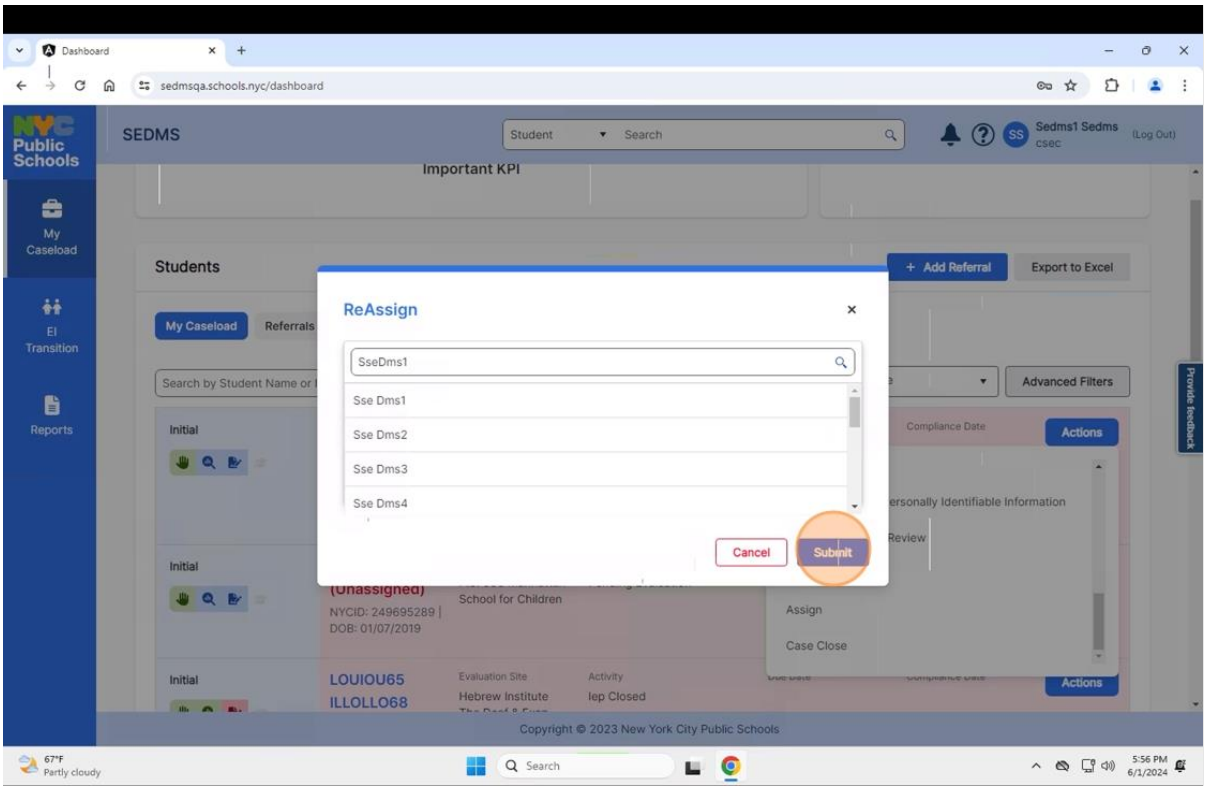
4. Scroll through the options, then click **Assign**.



4. After clicking **Assign**, a pop up will appear where you can select the user to assign the student to by clicking their name. CPSE Administrators and Chairpersons can assign students to themselves or others. The users that appear on the list are designated by your physical location and access level rights. If you do not see a user on the list that you believe should appear, reach out to your administrator.



5. After selecting a user, click **Submit**. The student record will change from pink to white and will be assigned to the selected user.



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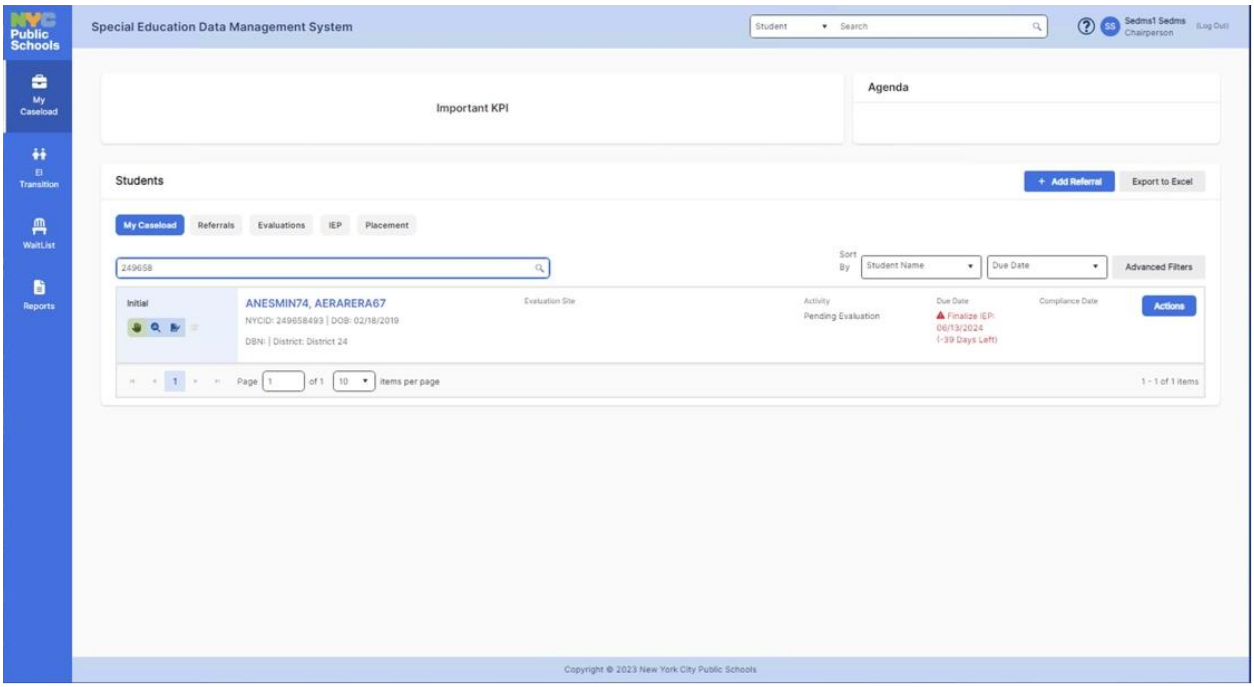
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