



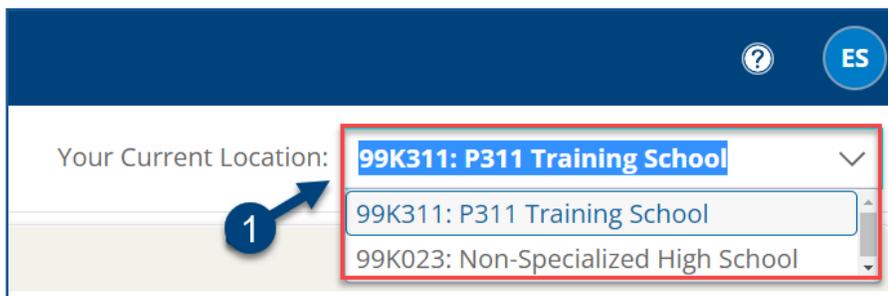
Adding or Removing Students on My Caseload

Introduction

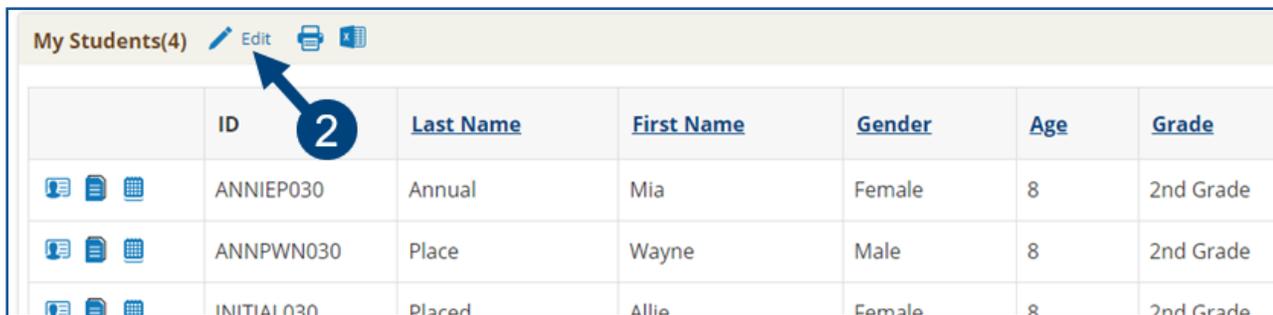
This training guide provides instruction on adding or removing students from *My Student Caseload*.

Adding a Student to Your Caseload

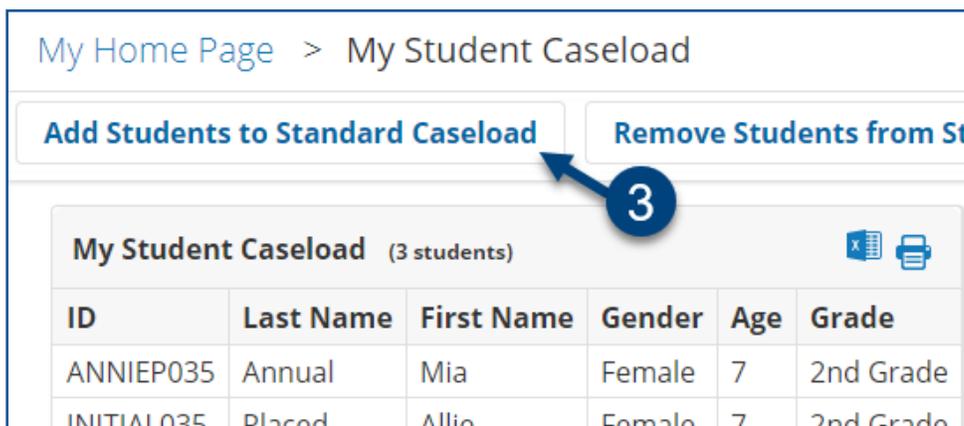
1. If you are assigned more than one school, you must first select the student's school from the *Your Current Location* dropdown menu on the homepage before adding or removing student(s) from *My Student Caseload*.



2. From the *My Students* panel, click **Edit** to display the caseload management options.



3. Click **Add Students to Standard Caseload**. The *Students Quick Search Form* will open.



4. Type the student's information into the *Students Quick Search Form*, and click **Search**.

Note: It is best practice to enter the student *ID* when possible.

Students Quick Search Form
Enter one or more fields and click the 'Search' button to find Students with the same field information.

ID

Last Name

First Name

Additional Admin (ID) lookup

Birth Date Between and (inclusive)

Gender (N/A)

Grade (N/A)

Receiving Admin (ID) lookup

4 → Search Clear

5. **Check** the box to select the student.

↓ Add Students Marked Below to Standard Caseload

<input type="checkbox"/>	ID	Last Name	First N
<input checked="" type="checkbox"/>	ANNIEP048	Annual	Mia

↑ Add Students Marked Above to Standard Caseload

6. Click **Add Students Marked Below to Standard Caseload** or **Add Students Marked Above to Standard Caseload**.

↓ Add Students Marked Below to Standard Caseload

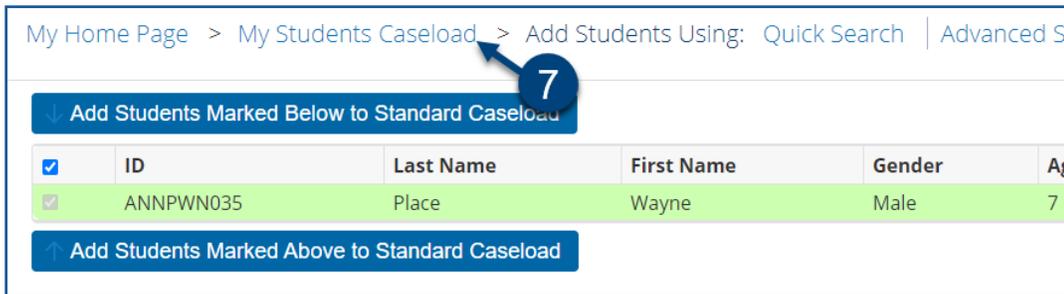
<input checked="" type="checkbox"/>	ID	Last Name
<input checked="" type="checkbox"/>	ANNIEP002	Annual

↑ Add Students Marked Above to Standard Caseload

Note: A message will briefly display to confirm the caseload addition.



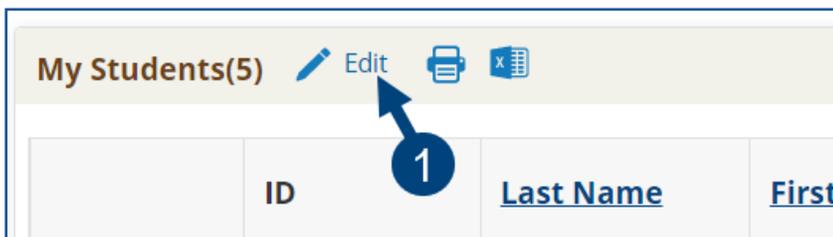
7. Click **My Students Caseload** to return to your caseload and verify the student was added.



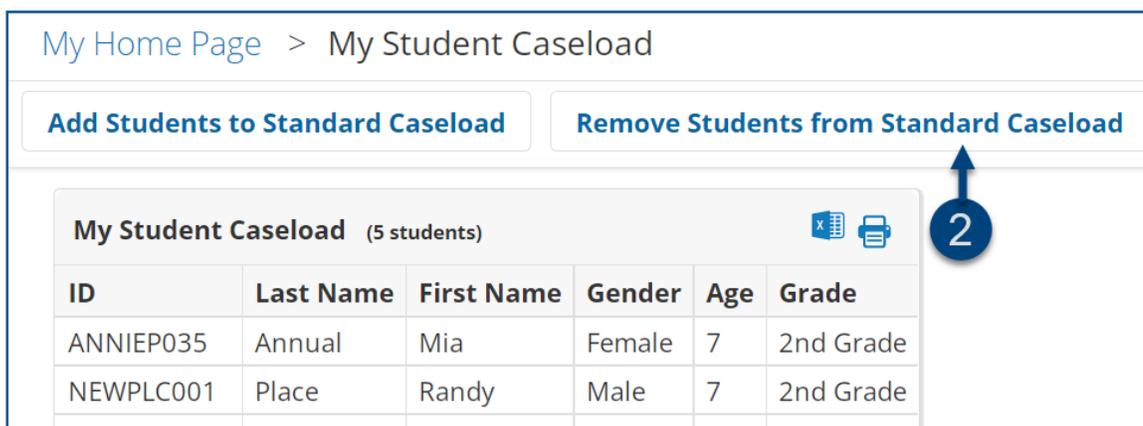
Note: After the student is on your caseload, you may record services provided to that student using the *Encounter Attendance Service Record* in SESIS.

Removing a Student from Your Caseload

1. From the *My Students* panel on the homepage, click **Edit** to display the caseload management options.



2. Click **Remove Students from Standard Caseload**.



3. Check the **box** to the left of each student to be removed. The background color of the selected

student(s) will turn green when selected.

4. Click **Remove Students Marked Below from Standard caseload** or **Remove Students Marked Above from Standard Caseload** to remove the student(s) from your caseload.

My Home Page > My Student Caseload > Remove Students from Standard Caseload

↓ Remove Students Marked Below from Standard Caseload

	ID	Last Name	First Name	Gender	Age	Grade
<input type="checkbox"/>	ANNIEP035	Annual	Mia	Female	7	2nd Grade
<input checked="" type="checkbox"/>	ANNPWN035	Place	Wayne	Male	7	2nd Grade
<input type="checkbox"/>	INITIAL035	Placed	Allie	Female	7	2nd Grade
<input type="checkbox"/>	REEVAL035	Reeval	Rhonda	Female	7	2nd Grade

↑ Remove Students Marked Above from Standard Caseload

5. Click **My Student Caseload** to return to your caseload to verify the student was removed.

My Home Page > My Student Caseload > Remove Students from Standard Caseload

↓ Remove Students Marked Below from Standard Caseload

<input type="checkbox"/>	ID	Last Name	First Name	Gender	Age	Grade
<input type="checkbox"/>	ANNIEP035	Annual	Mia	Female	7	2nd Grade
<input type="checkbox"/>	INITIAL035	Placed	Allie	Female	7	2nd Grade
<input type="checkbox"/>	REEVAL035	Reeval	Rhonda	Female	7	2nd Grade

↑ Remove Students Marked Above from Standard Caseload