

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.

My Students(4)	Edit 🖶 🗐					
	10 2	Last Name	<u>First Name</u>	<u>Gender</u>	Age	<u>Grade</u>
	ANNIEP030	Annual	Mia	Female	8	2nd Grade
	ANNPWN030	Place	Wayne	Male	8	2nd Grade
		Placed	Allie	Female	8	2nd Grade

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

Ν	/ly Home Pa	age > My	Student Ca	seload		
	Add Students	s to Standard	Caseload	Remove	e Stud	ents from St
	My Student	t Caseload (3	students)	3		💷 🖶
	ID	Last Name	First Name	Gender	Age	Grade
	ANNIEP035	Annual	Mia	Female	7	2nd Grade
	INITIAL 035	Placed	Allie	Female	7	2nd Grade

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.

Enter one or more fields	and click the	e 'Search	' button to			
find Students with the sa	me field info	ormatior				
ID						
Last Name						
First Name						
Additional Admin						(ID) lookur
Birth Date	Between			and 🔲	(inclusive)	
Gender	(N/A)	\sim				
Grade	(N/A)		\sim			
Receiving Admin						(ID) lookur

5. Check the box to select the student.

\checkmark Add Students Marked Below to \approx	Standard Caseload	
	Last Name	First N
	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					
	ID	Last Name			
	ANNIEP002	Annual			
Add St	tudents Marked Above t	o 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.

My Ho	me Page > My Studen d Students Marked Below	ts Caseload > Add St	udents Using: Quick S	Search Advar	nced Se
	ID	Last Name	First Name	Gender	Ag
	ANNPWN035	Place	Wayne	Male	7
Ad \uparrow	d Students Marked Above	to Standard Caseload			

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.

My Home Pag	ge > My St	tudent Case	eload			
Add Students	to Standard C	aseload	Remove	Stude	nts from Sta	ndard Caseload
My Student	Caseload (5 st	tudents)			I	2
ID	Last Name	First Name	Gender	Age	Grade	
ANNIEP035	Annual	Mia	Female	7	2nd Grade	
NEWPLC001	Place	Randy	Male	7	2nd Grade	
				_		

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	Н	ome Page 🗦	> My Stude	nt Caseloac	> Rer	nove	Students from Standard Caseload
	/ F	Remove Stude	ents Marked E	Below from S	tandard C	aselo	ad
3		ID	Last Name	First Name	Gender	Age	Grade
	Ļ	ANNIEP035	Annual	Mia	Female	7	2nd Grade
Ż		ANNPWN035	Place	Wayne	Male	7	2nd Grade
)	INITIAL035	Placed	Allie	Female	7	2nd Grage
)	REEVAL035	Reeval	Rhonda	Female	7	2nd Crade
1	► F	Remove Stude	ents Marked A	Above from S	tandard (aselo	bad

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

\mathbf{V}	Remove Stu	dents Markeo	Below from	Standard	Case	load	
	ID	Last Name	First Name	Gender	Age	Grade	
	ANNIEP035	Annual	Mia	Female	7	2nd Grade	
	INITIAL035	Placed	Allie	Female	7	2nd Grade	
	REEVAL035	Reeval	Rhonda	Female	7	2nd Grade	