



Creating and Managing Caseload Groups

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Introduction

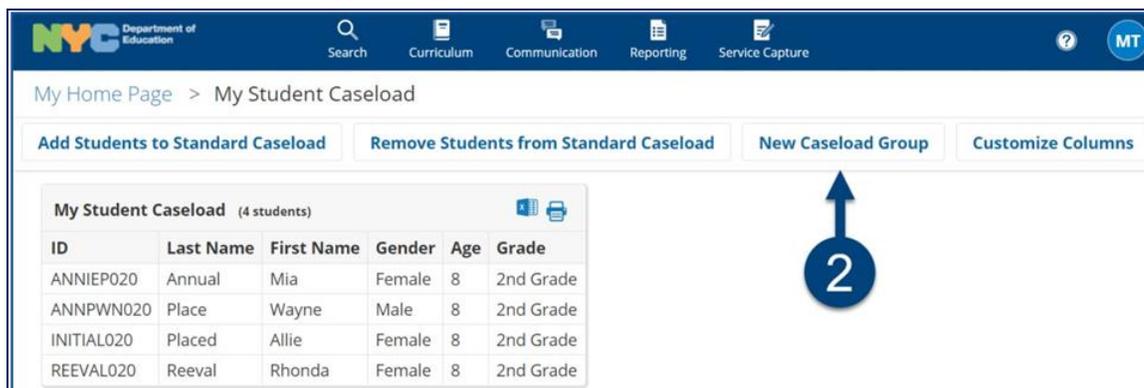
This training guide provides instruction to create, manage, and delete caseload groups within your *My Students* panel.

Creating a New Caseload Group

1. Navigate to the *My Students* panel at the bottom of your homepage and click **Edit**.



2. Click **New Caseload Group** from the *My Student Caseload* screen to create a new group.



3. Enter a **Group Name**.
4. Place a **checkmark** in the box to the left of the student IDs to be included in the group.
5. Click **Accept**.

New Caseload Group

Group Name: ← 3

Select the students to be in this caseload group:

<input type="checkbox"/>	ID	Last Name	First Name	Gender	Age	Grade
<input checked="" type="checkbox"/>	ANNIEP020	Annual	Mia	Female	8	2nd Grade
<input type="checkbox"/>	ANNPWN020	Place	Wayne	Male	8	2nd Grade
<input type="checkbox"/>	INITIAL020	Placed	Allie	Female	8	2nd Grade
<input checked="" type="checkbox"/>	REEVAL020	Reeval	Rhonda	Female	8	2nd Grade

4 → 5 →

Note: The group displays on the *My Student Caseload* screen.

6. Select Entire Caseload from the Select Group dropdown menu to create another caseload group.
7. Click **New Caseload Group**.

My Home Page > My Student Caseload

Select Group: (Entire Caseload) ← 6 ↑ 7

ID	Last Name	First Name	Gender	Age	Grade
ANNIEP020	Annual	Mia	Female	8	2nd Grade
REEVAL020	Reeval	Rhonda	Female	8	2nd Grade

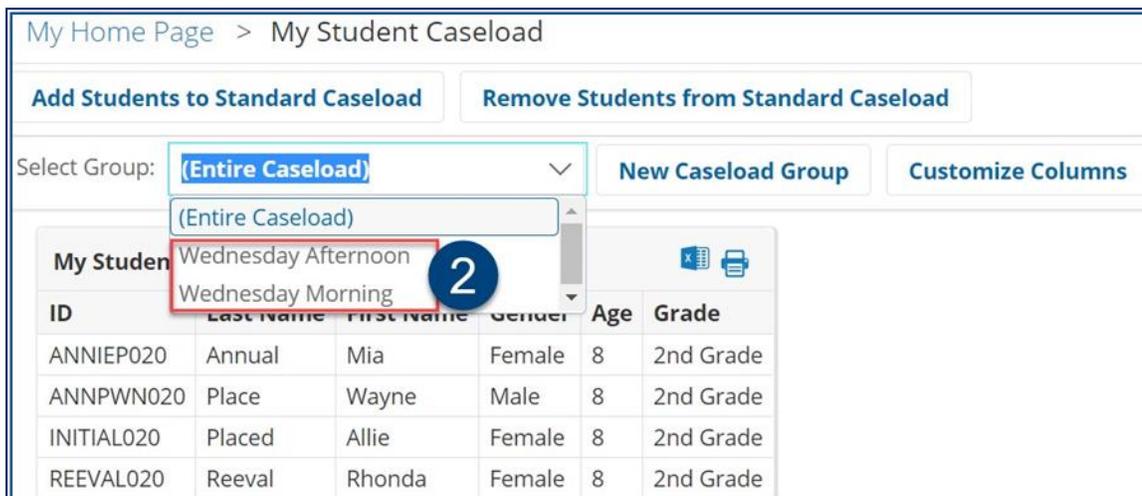
8. Repeat steps 3, 4, and 5 above.

Managing Existing Caseload Groups

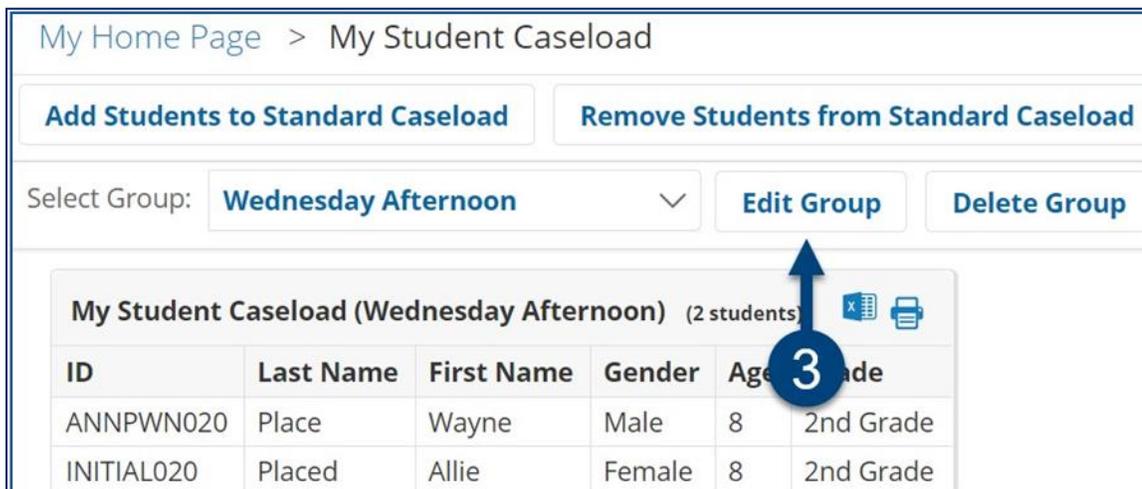
1. Navigate to the *My Students* panel at the bottom of your homepage and click **Edit**.



2. From the *Select Group* dropdown menu select the **group** you want to edit.



3. Click **Edit Group**.



- Your entire caseload displays with the students currently identified for this group. The students are checked and highlighted in green.
- Uncheck** a student in the group if appropriate, and/or **check the box** to add a new student.
- You can also change the *Group Name*.
- Click **Accept** when you have completed your edits.

Note: If you delete a student from a group, they will remain on your entire caseload. If you delete a student from your entire caseload, they will automatically be removed from any existing groups.

Edit Caseload Group

Group Name: Wednesday Afternoon ← 6

Select the students to be in this caseload group:

<input type="checkbox"/>	ID	Last Name	First Name	Gender	Age	Grade
<input type="checkbox"/>	ANNIEP020	Annual	Mia	Female	8	2nd Grade
<input checked="" type="checkbox"/>	ANNPWN020	Place	Wayne	Male	8	2nd Grade
<input checked="" type="checkbox"/>	INITIAL020	Placed	Allie	Female	8	2nd Grade
<input type="checkbox"/>	REEVAL020	Reeval	Rhonda	Female	8	2nd Grade

5

7 → Accept Cancel

Deleting an Existing Caseload Group

- Navigate to the *My Students* panel at the bottom of your homepage and click **Edit**.

My Students(4) Edit

ID	Last Name	First Name	Gender
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1

- Select the **group** you want to delete from the *Select Group* dropdown.

Add Students to Standard Caseload Remove Students from Sta

Select Group: (Entire Caseload) New Caseload

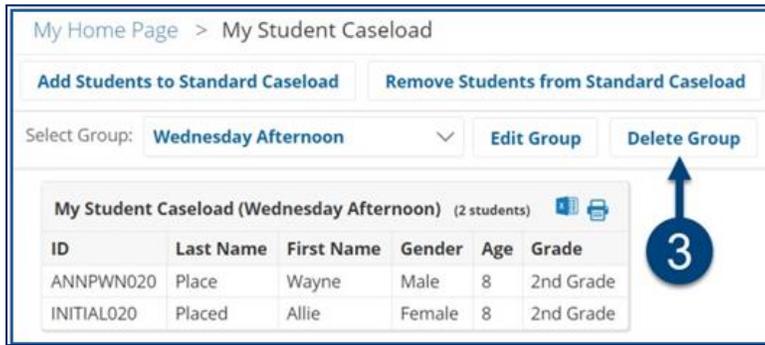
(Entire Caseload)

My Student Wednesday Afternoon 2

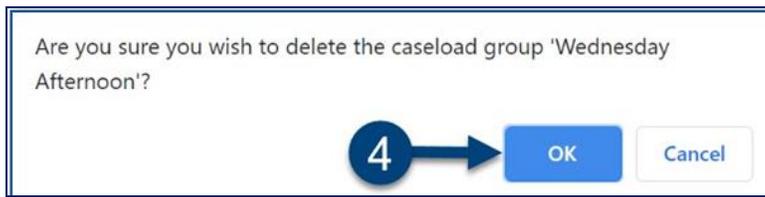
Wednesday Morning

ID	Last Name	First Name	Gender	Age	Grade
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3. Click **Delete Group**.



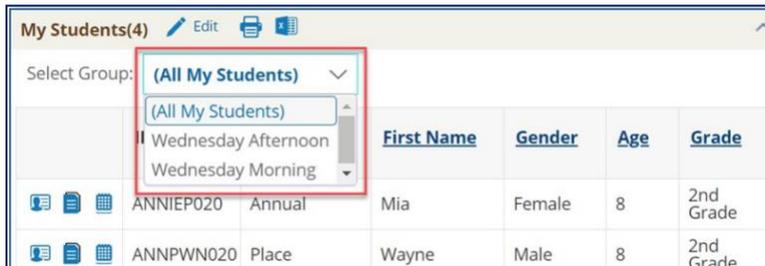
4. Click **OK** in the pop-up window.



Note: Deleting a caseload group does not remove the students from your caseload. Students can be added to multiple caseload groups.

Selecting a Caseload Group

1. From the *My Students* panel, select the **caseload group** from the *Select Group* dropdown menu.



2. From your *Service Calendar's Filter* dropdown menu, select the **caseload group**.

