



# 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.

| My Students | s(4) 🖍 Edit |           |            |               |     | ^            |
|-------------|-------------|-----------|------------|---------------|-----|--------------|
|             | 10          | Last Name | First Name | <u>Gender</u> | Age | <u>Grade</u> |
|             | ANNIEP020   | Annual    | Mia        | Female        | 8   | 2nd Grade    |
|             | ANNPWN020   | Place     | Wayne      | Male          | 8   | 2nd Grade    |
|             |             |           |            |               | -   |              |

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

| NYC Depart<br>Educat | ment of<br>lon | Q<br>Search | Curric | -<br>culum | Communication  | II<br>Reporting | Servio | 🗾<br>ce Capture    | ?              | МТ  |
|----------------------|----------------|-------------|--------|------------|----------------|-----------------|--------|--------------------|----------------|-----|
| /ly Home Pag         | ge > My S      | tudent Case | eload  |            |                |                 |        |                    |                |     |
| Add Students t       | o Standard C   | aseload     | Remove | Stude      | nts from Stand | ard Caseloa     | d      | New Caseload Group | Customize Colu | mns |
| My Student (         | Caseload (4 s  | tudents)    |        |            |                |                 |        | ↑                  |                |     |
| ID                   | Last Name      | First Name  | Gender | Age        | Grade          |                 |        |                    |                |     |
| ANNIEP020            | Annual         | Mia         | Female | 8          | 2nd Grade      |                 |        | (2)                |                |     |
| ANNPWN020            | Place          | Wayne       | Male   | 8          | 2nd Grade      |                 |        |                    |                |     |
| INITIAL020           | Placed         | Allie       | Female | 8          | 2nd Grade      |                 |        |                    |                |     |
| REEVAL020            | Reeval         | Rhonda      | Female | 8          | 2nd Grade      |                 |        |                    |                |     |

- 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 Grou | р            |            |        |     |           |  |  |  |  |
|---|---------------|--------------|------------|--------|-----|-----------|--|--|--|--|
| Group   | Name: Wedne   | sday Morning |            | 3      |     |           |  |  |  |  |
| Select the students to be in this caseload group: |               |              |            |        |     |           |  |  |  |  |
|   | ID            | Last Name    | First Name | Gender | Age | Grade     |  |  |  |  |
|   | ANNIEP020     | Annual       | Mia        | Female | 8   | 2nd Grade |  |  |  |  |
|   | ANNPWN020     | Place        | Wayne      | Male   | 8   | 2nd Grade |  |  |  |  |
|   | INITIAL020    | Placed       | Allie      | Female | 8   | 2nd Grade |  |  |  |  |
|   | REEVAL020     | Reeval       | Rhonda     | Female | 8   | 2nd Grade |  |  |  |  |
| 7   | 4             |              | 5-         | Acc    | ept | Cancel    |  |  |  |  |

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 P     | age > My       | Student Cas | seload |       |               |                |                    |
|---------------|----------------|-------------|--------|-------|---------------|----------------|--------------------|
| Add Student   | s to Standard  | Caseload    | Remove | Stude | ents from Sta | ndard Caseload |                    |
| Select Group: | Wednesday I    | Morning     | ~      | E     | lit Group     | Delete Group   | New Caseload Group |
|               | (Entire Caselo | ad) 🗲       | 6      | ]     |               |                |                    |
| My Studen     | Wednesday N    | lorning     |        | udent | s) 💶 🖶        |                | 1                  |
| ID            | Last Name      | First Name  | Gender | Age   | Grade         |                | 7                  |
| 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.

| My Students(4) 🖍 Edit 🖶 🗐 |           |           |            |               |  |  |  |  |
|---------------------------|-----------|-----------|------------|---------------|--|--|--|--|
|                           | 10        | Last Name | First Name | <u>Gender</u> |  |  |  |  |
|                           | ANNIEP020 | Annual    | Mia        | Female        |  |  |  |  |

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

| Add Student   | Add Students to Standard Caseload |                     |        | Remove Students from Standard Caseload |             |       |                   |  |  |  |
|---------------|-----------------------------------|---------------------|--------|--|-------------|-------|-------------------|--|--|--|
| Select Group: | (Entire Caselo                    | bad)                | $\sim$ | N                                      | ew Caseload | Group | Customize Columns |  |  |  |
|               | (Entire Caseloa                   | ad)                 |        |  |             |       |                   |  |  |  |
| My Studen     | Wednesday Af                      | Wednesday Afternoon |        |  |             |       |                   |  |  |  |
| ID            | Wednesday M                       | Wednesday Morning   |        | 1.00                                   | Crada       |       |                   |  |  |  |
| ID            | Last wante                        | ristivanie          | Genuer | Age                                    | Grade       |       |                   |  |  |  |
| ANNIEP020     | Annual                            | Mia                 | Female | 8                                      | 2nd Grade   |       |                   |  |  |  |
| ANNPWN02      | 20 Place                          | Wayne               | Male   | 8                                      | 2nd Grade   |       |                   |  |  |  |
| INITIAL020    | Placed                            | Allie               | Female | 8                                      | 2nd Grade   |       |                   |  |  |  |
| REEVAL020     | Reeval                            | Rhonda              | Female | 8                                      | 2nd Grade   |       |                   |  |  |  |

#### 3. Click Edit Group.

| 1  | My Home Pa   | ge > My St    | udent Case    | load                    |         |             |                |
|----|--------------|---------------|---------------|-------------------------|---------|-------------|----------------|
|    | Add Students | to Standard C | aseload       | Remove S                | tuden   | ts from Sta | ndard Caseload |
| Se | elect Group: | Wednesday Af  | ternoon       | $\sim$                  | Edi     | t Group     | Delete Group   |
|    | My Student   | Caseload (Wee | dnesday After | r <mark>noon)</mark> (2 | student |             |                |
|    | ID           | Last Name     | First Name    | Gender                  | Age     | 3 ide       |                |
|    | ANNPWN020    | Place         | Wayne         | Male                    | 8       | 2nd Grade   | 2              |
|    | INITIAL020   | Placed        | Allie         | Female                  | 8       | 2nd Grade   | 2              |

- 4. Your entire caseload displays with the students currently identified for this group. The students are checked and highlighted in green.
- 5. Uncheck a student in the group if appropriate, and/or check the box to add a new student.
- 6. You can also change the Group Name.
- 7. 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.

| roup | Name: Wedne      | sday Afternoo               |                            | 6            |     |           |
|------|------------------|-----------------------------|----------------------------|--------------|-----|-----------|
| lec  | t the students t | o be in this c<br>Last Name | aseload grou<br>First Name | p:<br>Gender | Age | Grade     |
|      | ANNIEP020        | Annual                      | Mia                        | Female       | 8   | 2nd Grade |
|      | ANNPWN020        | Place                       | Wayne                      | Male         | 8   | 2nd Grade |
|      | INITIAL020       | Placed                      | Allie                      | Female       | 8   | 2nd Grade |
|      | REEVAL020        | Reeval                      | Rhonda                     | Female       | 8   | 2nd Grade |

#### **Deleting an Existing Caseload Group**

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



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



3. Click **Delete Group**.

| Add Students t  | to Standard C      | aseload             | Remove S       | tuden    | ts from Sta        | ndard Caseload |
|-----------------|--------------------|---------------------|----------------|----------|--------------------|----------------|
| Select Group: V | Vednesday Af       | ternoon             | ~              | Edit     | Group              | Delete Group   |
| My Student      | Caseload (Wee      | dnesday After       | rnoon) (2      | student  | s) 💶 🖶             | I              |
|                 |                    |                     |                |          |                    |                |
| ID              | Last Name          | First Name          | Gender         | Age      | Grade              | .3             |
| ID<br>ANNPWN020 | Last Name<br>Place | First Name<br>Wayne | Gender<br>Male | Age<br>8 | Grade<br>2nd Grade | 3              |

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.

| My Students(  | 4) 🧪 Edit 🧧                             |                                 |                   |        |     | ~            |
|---------------|---|---------------------------------|-------------------|--------|-----|--------------|
| Select Group: | (All My Stud                            | dents) 🗸                        |                   |        |     |              |
|               | (All My Stude<br>Wednesday<br>Wednesday | ents)<br>Afternoon<br>Morning 🗸 | <u>First Name</u> | Gender | Age | <u>Grade</u> |
|               | ANNIEP020                               | Annual                          | Mia               | Female | 8   | 2nd<br>Grade |
|               | ANNPWN020                               | Place                           | Wayne             | Male   | 8   | 2nd<br>Grade |

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

| Department of<br>Education   | Q<br>Search | E<br>Curriculum | Communicat | tion Reporti | ng Service Caj | pture      | (    | ?     |
|--|-------------|-----------------|------------|--------------|----------------|------------|------|-------|
|  | Service     | s V             | Reports    | Show         | Personal Cale  | ndar Items | Prin | t     |
| Filter:<br>(Entire Caseload) V   | Sup         | today 🔻         | Jun, 2021  | Wed          | Thu            | Day        | Week | Month |
| (Entire Caseload)<br>Wednesday Afternoon<br>Wednesday Morning<br>Placed,Allie (INITIAL020) | 30          | 31              | 1 Jun      | 2            | 3              | 4          | 5    | Sat   |
| Reeval,Rhonda (REEVAL020)  | 6           | 7               | 8          | 9            | 10             | 11         | 12   |       |