



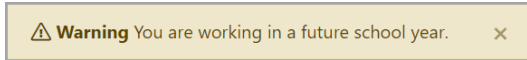
Managing a Caseload

Note: Caseloads can be created and managed only by users with access to the **Case Management** screen. For more information, see the Special Services Roles instructional sheet.

Creating a New Caseload

- On the **Case Management** screen, complete one of the following:
 - To create a new caseload for the current school year, ensure that the current school year displays in the **School Year** drop-down list.
 - To create a new caseload for a future school year, select the desired **School Year** from the drop-down list.

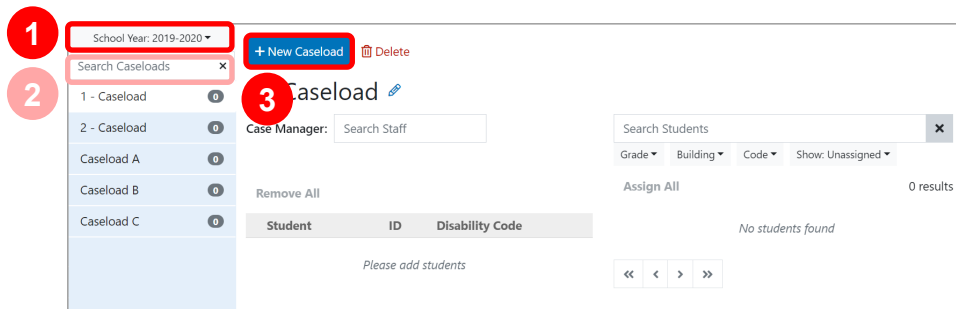
Note: When you select a future school year, a warning message displays to indicate that a future school year is in context.



Note: To view a caseload from a past school year in read-only format, in the **School Year** drop-down list, select the desired school year.

A list of all caseloads (if any) for the selected school year display.

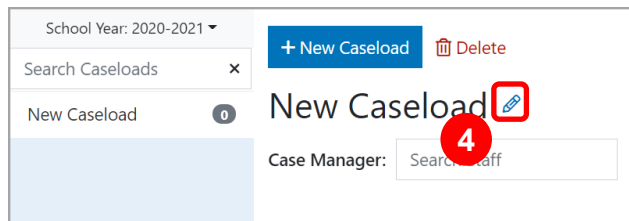
- (Optional) In the **Search Caseloads** field, enter 2 or more characters of a caseload name to narrow the caseloads that display in the list below the field.
- Click **New Caseload**.



The new caseload displays on the left side of the screen with an indicator that displays the number of students currently assigned to the caseload.

Note: To delete the caseload, click **Delete**.

- To rename the caseload, beside **New Caseload**, click . Then, enter the desired name for the caseload in the field.



- Click outside of the field.

A **Caseload Updated** message displays, and your changes save automatically.

**see reverse side for more information*

Assigning a Staff Member as a Case Manager

- 1 On the **Case Management** screen, in the **Case Manager** field, enter 2 or more letters of a staff member's first or last name.
- 2 In the results list that displays, select the appropriate staff member.

A **Save Successful** message displays, and the staff member is assigned as the case manager for this caseload.

Note: To unassign the staff member, click **✕**.

Example Caseload ✎

Case Manager: ✕

2 Smiles, Mary

Example Caseload ✎

Case Manager: Smiles, Mary ✕

Assigning Students to a Caseload

- 1 On the **Case Management** screen, to search for students, use one or both of the following methods:
 - Method 1: In the **Search Students** field, enter 2 or more letters of a student's first or last name.
 - Method 2: Below the **Search Students** field, select 1 or more filter options from any of the drop-down lists.

Method 1

✕

Grade ▾ Building ▾ Code ▾ Show: Unassigned ▾

Assign All 55 results

+	Anderson, Jordan Local High school	xxxxxx Grade: 11
+	Gordon, Jocelyn Local Elementary School	xxxxxx Grade: KG

Method 2

Search Students ✕

Grade ▾ Building ▾ Code ▾ Show: Unassigned ▾

Assign All 55 results

+	Anderson, Jordan Local High school	xxxxxx Grade: 11
+	Gordon, Jocelyn Local Elementary School	xxxxxx Grade: KG

- 2 A list of students displays based on the search criteria you entered and/or selected.

To assign individual students to the caseload, beside the appropriate student's name, click **+**. Or, to add all students who display in the results list, click **Assign All**.

Assign All 55 results

+	Anderson, Jordan Local High school	xxxxxx Grade: 11
+	Gordon, Jocelyn Local Elementary School	xxxxxx Grade: KG

The students you assigned now display in a list below the **Case Manager** field, and on the left side of the **Case Management** screen, the indicator number updates.

Note: To unassign a student from the caseload, beside the student's name, click **✕**. Or, to unassign all students, click **Remove All**.

Case Manager: Smith, Andrew ✕

Remove All

	Student	ID	Disability Code
✕	Anderson, Jordan	xxxxxx	
✕	Gordon, Jocelyn	xxxxxx	

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