



Adding and Removing Students on a Provider's Caseload

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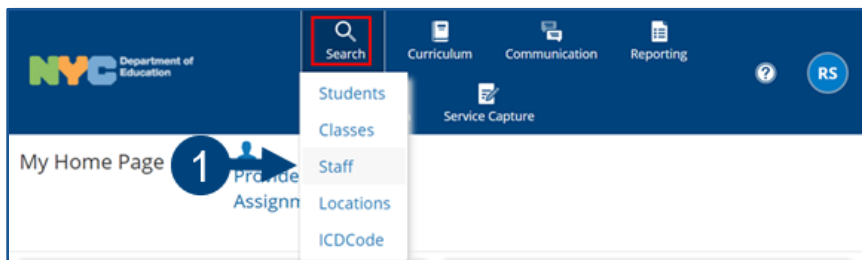
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Introduction

This training guide provides instruction for supervisors, administrators of special education (ASEs), and related service points on how to add or remove a student(s) from a SESIS caseload.

Displaying the Provider's Caseload

1. From the *Top Navigation Bar*, hover over **Search** and select **Staff** from the dropdown menu.

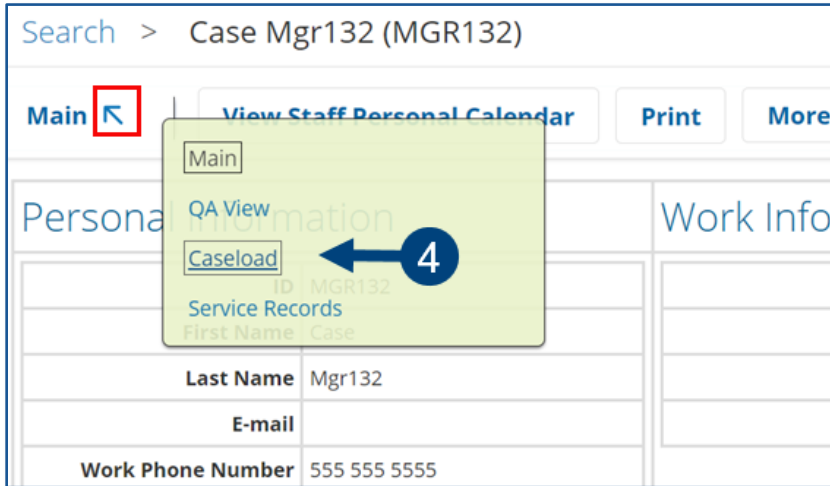


2. Type the provider's *ID* or *First* and *Last Name*, then click **Search**.

3. Click the **Profile** icon.

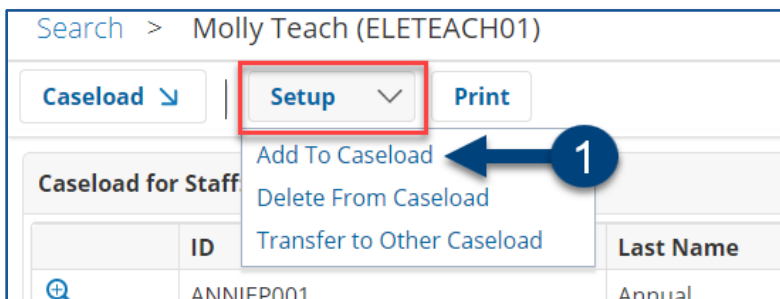


4. Hover over the *Main* section arrow, and then select **Caseload** from the dropdown menu.

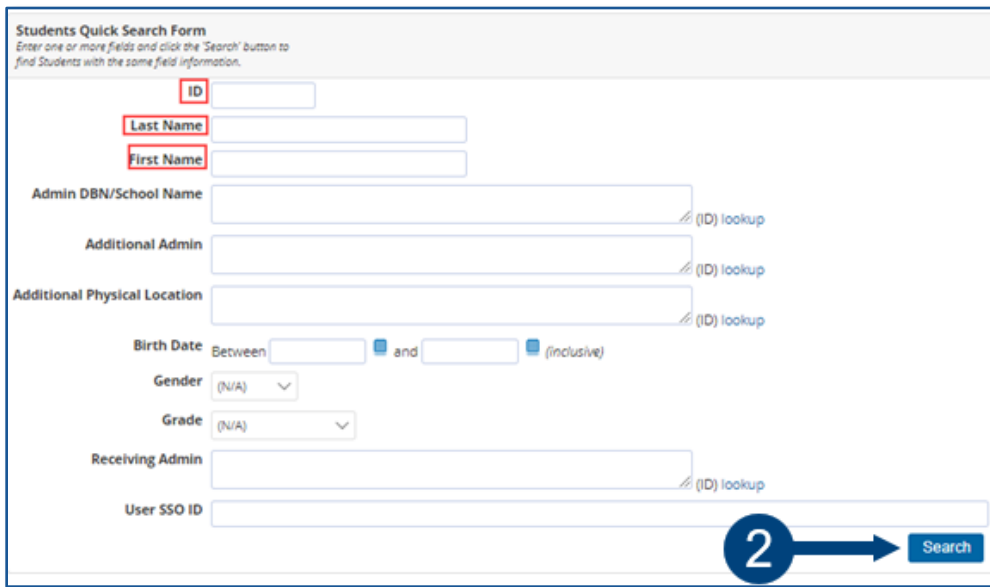


Adding a Student to a Caseload

1. From the *Setup* dropdown menu, select **Add to Caseload**.



2. Type the student's *ID* or *First* and *Last Name*, then click **Search**.



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

Admin DBN/School Name (ID) lookup

Additional Admin (ID) lookup

Additional Physical Location (ID) lookup

Birth Date Between and (inclusive)

Gender (N/A)

Grade (N/A)

Receiving Admin (ID) lookup

User SSO ID

2 → Search

3. **Check** the box next to the student being added to the caseload.



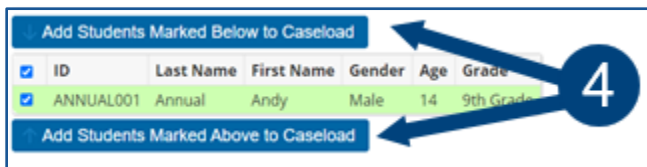
↓ Add Students Marked Below to Caseload

<input type="checkbox"/> ID	Last Name	First Name	Gender	Age	Grade
<input type="checkbox"/> ANNUAL001	Annual	Andy	Male	14	9th Grade

↑ Add Students Marked Above to Caseload

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4. To add the student to the caseload, click **Add Students Marked Below to Caseload** or **Add Students Marked Above to Caseload**.



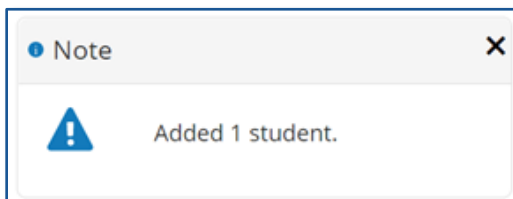
↓ Add Students Marked Below to Caseload

<input checked="" type="checkbox"/> ID	Last Name	First Name	Gender	Age	Grade
<input checked="" type="checkbox"/> ANNUAL001	Annual	Andy	Male	14	9th Grade

↑ Add Students Marked Above to Caseload

4

Note: A Note message will briefly display to confirm the student was successfully added.



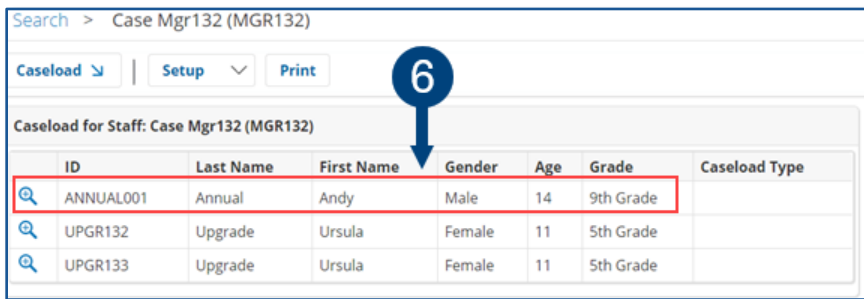
Note

! Added 1 student.

- Click to navigate back to the provider's **Caseload**.

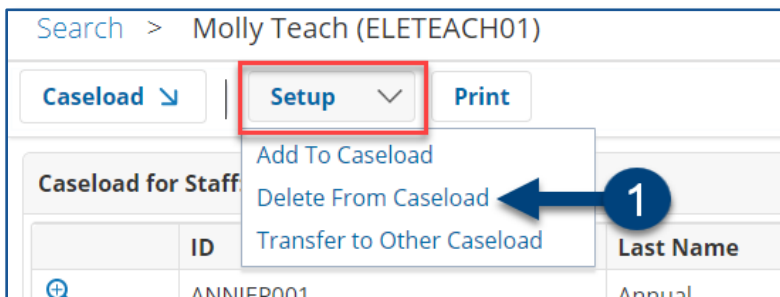


- Confirm that the student has been added to the caseload.

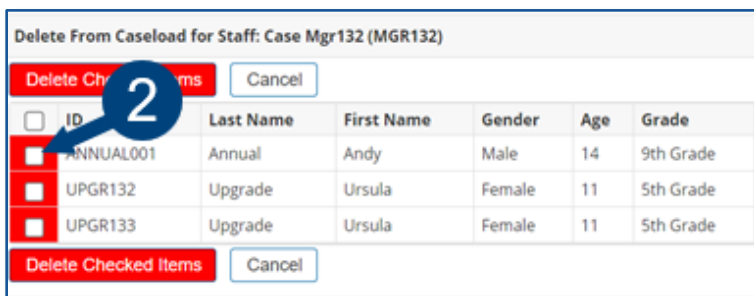


Removing a Student from a Caseload

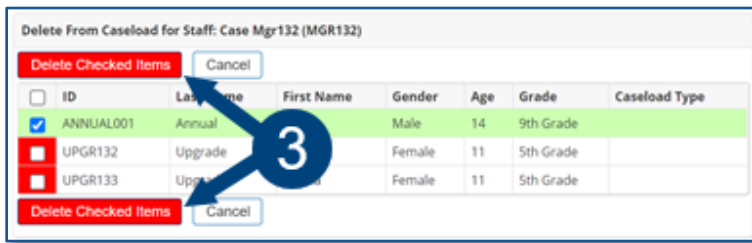
- From the *Setup* dropdown menu, select **Delete from Caseload**.



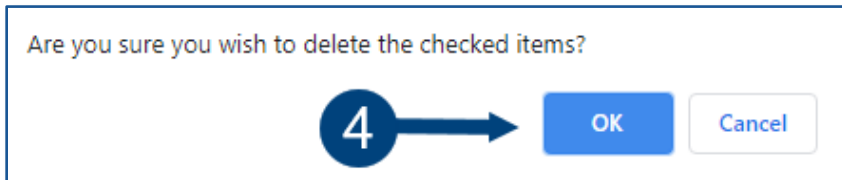
- Check** the box of the student being removed from the caseload.



3. Click **Delete Checked Items**.



4. A message will display to confirm the deletion. Click **OK** to immediately remove the student.



Note: The updated caseload will automatically display.

