

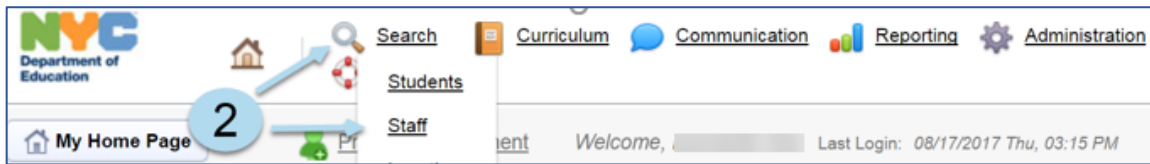
Adding and Removing Students on a SESIS Caseload

Introduction

This training guide provides instruction for Supervisors, Administrators of Special Education, and Related Service Points on how to add or remove students from a SESIS caseload.

How to Display a Provider's Caseload:

1. Log in to SESIS
2. From the Top Navigation Bar on the homepage, hover over **Search** and select **Staff** from the dropdown menu.



3. Type the provider's first and last name or ID and click **Search**.

Staff - Quick Search Form
Enter one or more fields and click the 'Search' button to find staff with the same field information.

ID

Last Name

First Name

Works At (ID) lookup

Language

Position

Provider Type

Caseload (ID) lookup

Include Inactive staff Profiles

4. Click the **Profile** icon, located to the left of the provider's name to display his/her *SEGIS Profile*.

Staff. Quick Search Advanced Search Search Results

Customize Columns Print Results

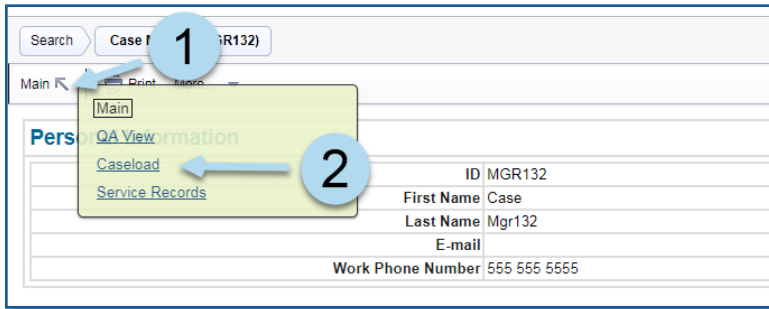
ID	Last Name	First Name	Works At	Provider Type	Position	Language
<input type="button" value="Profile"/> MGR132	Mgr132	Case	99K021: Non-Specialized Elem School	DOE		

5. Click the link to [Add a Student to a Caseload](#) or [Remove a Student from a Caseload](#).

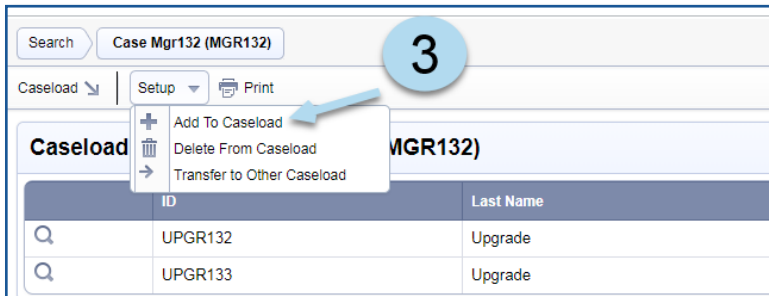
Add Student to a Caseload:

1. Click **Main** located on the upper left side of the screen.

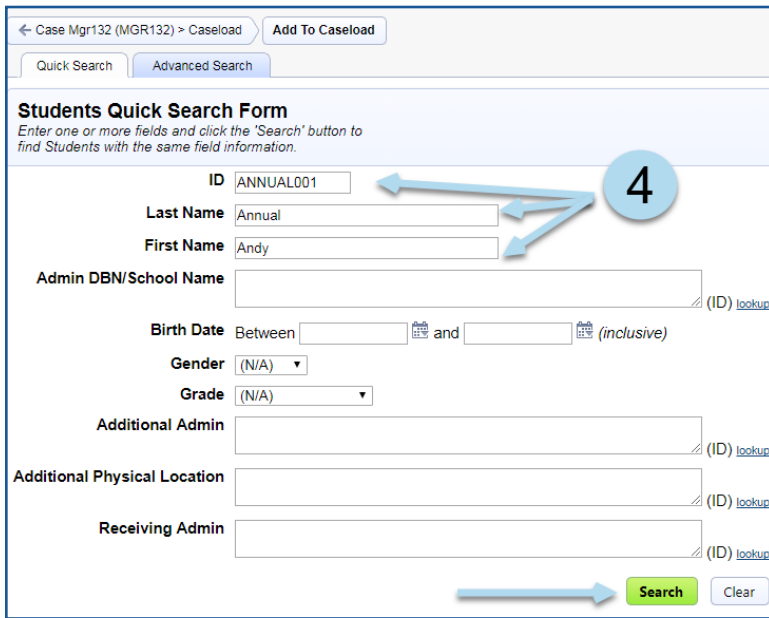
2. Select **Caseload** to display provider's caseload.



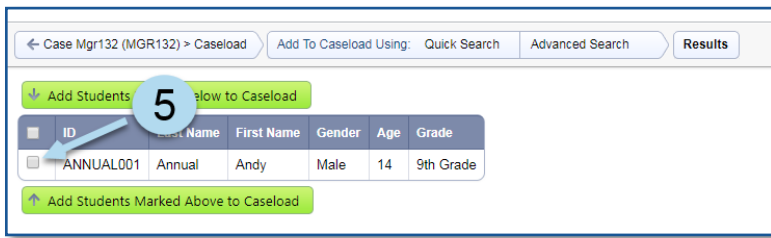
3. Click **Setup** and select **Add to Caseload** from the dropdown menu.



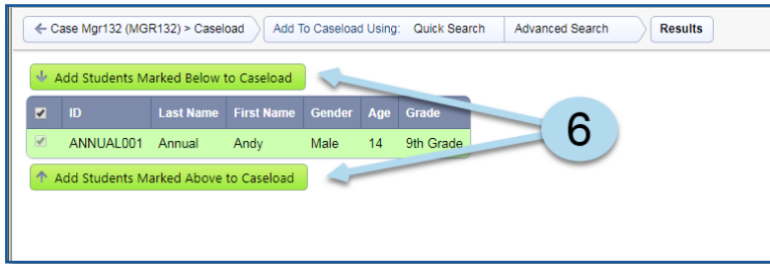
4. Input student ID, or first and last name and click **Search**.



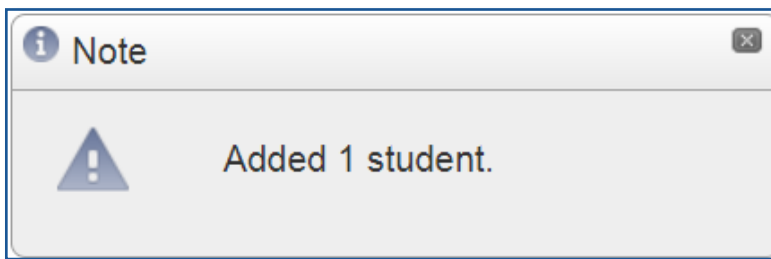
5. Check the box in the left margin to select a student to be added to the caseload.



6. Click **Add Students Marked Below to Caseload** or **Add Students Marked Above** to add student to the caseload.



Note: A Note message will briefly display to confirm the caseload addition.



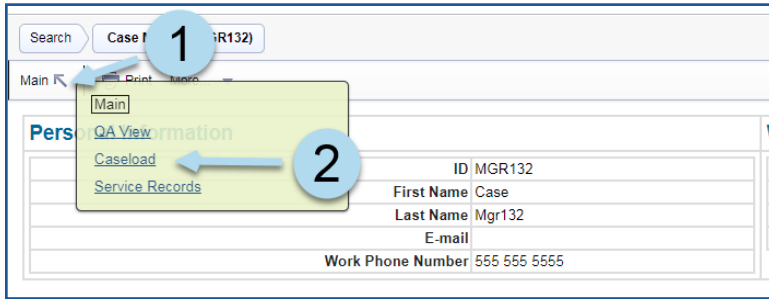
7. Select the **(Staff Name) > Caseload** at the top of the screen to return to the provider caseload and confirm the student.



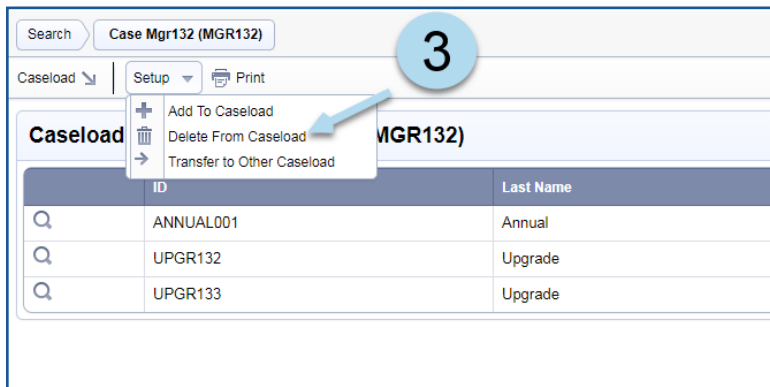
Remove a Student from a Caseload:

1. Click **Main** located on the upper left side of the screen.

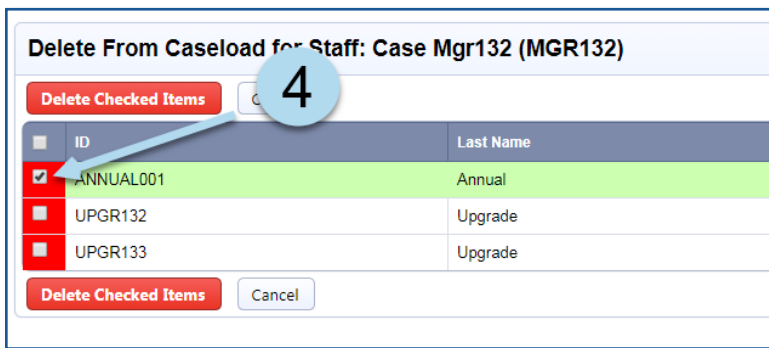
2. Select **Caseload** to display provider's caseload.



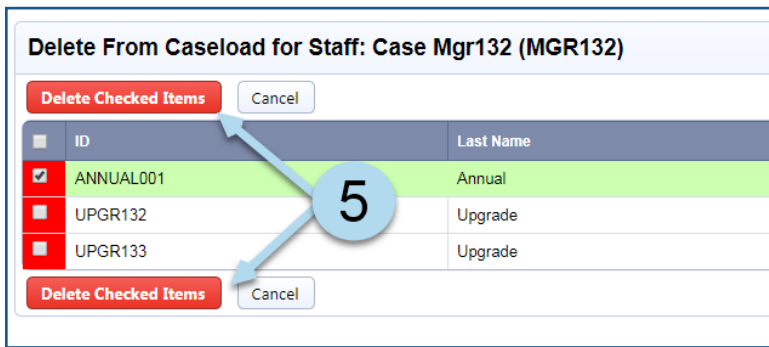
3. Click *Setup* and select **Delete From Caseload** from the dropdown menu.



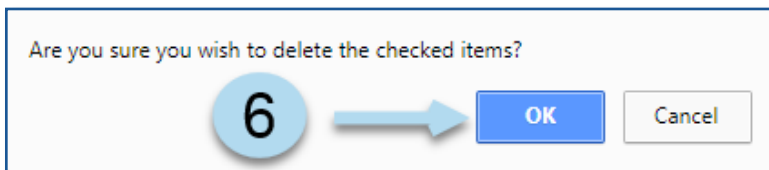
4. Check the box in the left margin to select a student(s) to be removed from the caseload.



5. Click **Delete Checked Items** to remove selected students from the caseload.



6. An alert message will display to confirm the deletion. Click **OK** to immediately remove the student.



Note: The updated caseload page will automatically display.

