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.

4. Click the Profile icon, located to the left of the provider’s name to display his/her SESIS Profile.

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.

![Delete From Caseload for Staff: Case Mgr132 (MGR132)](image)

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

![Are you sure you wish to delete the checked items?](image)

**Note:** The updated caseload page will automatically display.
Accessibility Report

Report created by: [Enter personal and organization information through the Preferences > Identity dialog.]
Organization:

Summary

The checker found no problems in this document.

- Needs manual check: 2
- Passed manually: 0
- Failed manually: 0
- Skipped: 1
- Passed: 29
- Failed: 0