Adding and Removing Students on a Provider’s Caseload

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Introduction

This training guide provides instructions for supervisors, administrators of special education, and related service points on how to add or remove students 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 first and last name or ID and click Search.
3. Click the **Profile** icon.

4. Hover over the **Main** section arrow, 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 first and last name or ID, then click **Search**.

3. Select the **check box** next to the student being added to the caseload.

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

**Note:** A **Note** message will briefly display to confirm the student was successfully added.
5. Click to navigate back to the provider’s Caseload.

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

Removing a Student from a Caseload

1. From the Setup dropdown menu, select Delete from Caseload.

2. Select the check box of the student being removed from the caseload.
3. Click **Delete Checked Items**.

![Delete Checked Items](image)

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

![Confirmation Message](image)

**Note:** The updated caseload will automatically display.