Adding or Removing Students on My Caseload

Introduction

This training guide provides instruction on adding or removing students from My Student Caseload.

Adding a Student to your Caseload

1. If you are assigned more than one school, you must first select the student’s school from the Your Current Location dropdown menu on the homepage, before adding a student on your caseload.

2. From the My Students panel, click Edit to display the caseload management options.

3. Click Add Students to Standard Caseload. The Students Quick Search Form will open.
4. Type the student’s information into the *Students Quick Search Form*, and then click **Search** to display the student list.

**Note:** It is best practice to enter the student ID when possible.

![Students Quick Search Form](image)

**Note:** If the student’s ID was entered, the checkbox for ID is pre-selected.

**Note:** The background color of the selected student will turn green when selected.

5. Click **Add Students Marked Below to Standard Caseload** or **Add Students Marked Above to Standard Caseload**.

![Add Students Marked Below to Standard Caseload](image)

**Note:** A message will briefly display to confirm the caseload addition.
6. Click **My Students Caseload** to return to your caseload and verify the student was added.

![Image of My Students Caseload](image)

**Note:** After the student is on your caseload, you may record services provided to that student using the Encounter Attendance service record in SESIS.

### Removing a Student from your Caseload

1. From the **My Students** panel on the homepage, click **Edit** to display the caseload management options.

![Image of My Students panel](image)

2. Click **Remove Student from Standard Caseload**.

![Image of Remove Student from Standard Caseload](image)
3. Check the box to the left of each student to be removed. The background color of the selected student(s) will turn to green when selected.

4. Click **Remove Students Marked Below from Standard caseload** or **Remove Students Marked Above** from Standard Caseload to remove the student from your caseload.

5. Click **My Student Caseload** to return to your caseload to verify the student was removed.