Creating and Managing Caseload Groups

Introduction

This training guide provides instructions to create and manage caseload groups which will assist you in finding students when recording services.

Creating a New Caseload Group

1. Navigate to the My Students section at the bottom of your homepage, and then click Edit.

2. Click New Caseload Group from the My Student Caseload screen to create a new group.
3. Enter a Group Name.
4. Place a checkmark in the box to the left of the students to be included in the group.
5. Click **Accept**.

**Note:** The group created displays on the **My Student Caseload** screen.

6. To create another caseload group, first select ** Entire Caseload** from the **Select Group** dropdown menu.

7. Click **New Caseload Group**.

8. Repeat steps 3, 4, and 5 above.
Managing Existing Caseload Groups

1. Navigate to the *My Students* section at the bottom of your homepage, and then click *Edit*.

2. Select the group that you want to edit from the *Select Group* dropdown menu.

![Image: User interface showing the My Student Caseload section with a highlighted group]

3. Click *Edit Group*.

![Image: User interface showing the My Student Caseload section with the Edit Group button highlighted]

4. Your entire caseload displays with the students that are currently identified for this group checked and highlighted in green.

5. Deselect a student in the group if appropriate, and/or check the box to add a new student.

6. You can also change the *Group Name*.

7. Click *Accept* when you have completed your edits.

**Note:** If you delete a student from your entire caseload, they will automatically be removed from any existing groups.
Deleting an existing Caseload Group

1. Navigate to the My Students section at the bottom of your homepage, and then click Edit.
2. Select the group that you want to delete from the Select Group dropdown.
3. Click Delete Group.
4. Click OK in the pop-up window.

**Note:** Deleting a caseload group does not remove the students from your caseload. Also, students can be added to multiple caseload groups.
Selecting a Caseload Group

From your *My Student Caseload*, select the caseload group from the *Select Group* dropdown menu.

![Select Group Dropdown Menu](image1)

From your *Service Calendar*, select the caseload group from the *Filter* dropdown menu.

![Filter Dropdown Menu](image2)
Accessibility Report

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