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 showing the My Student Caseload page with two groups selected: Wednesday Afternoon Group ( ENTIRE CASELOAD) and Wednesday Morning Group.]

3. Click Edit Group.

![Image showing the My Student Caseload page with the Wednesday Afternoon Group selected for editing.]

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]

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

![Service Calendar FilterDropdown]