

# Creating and Managing Caseload Groups



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











## 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**.

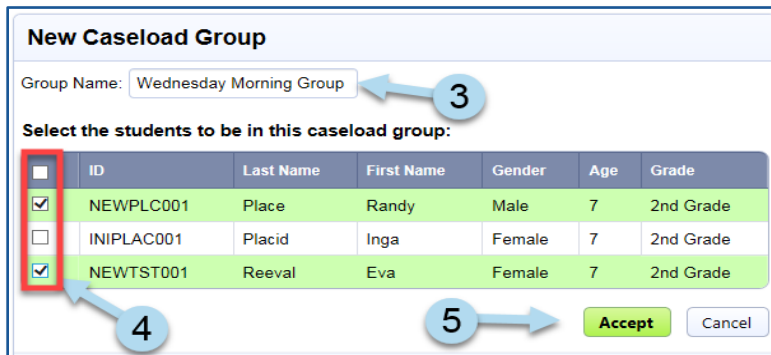
My Students (3)   		
	ID	Last Name
  	NEWPLC001	Place
  	INIPLAC001	Placid
  	NEWTST001	Reeval

2. Click **New Caseload Group** from the *My Student Caseload* screen to create a new group.

+ Add Students to Standard Caseload  Remove Students from Standard Caseload + New Caseload Group Customize Columns

My Student Caseload (3 students)  					
ID	Last Name	First Name	Gender	Age	Grade
NEWPLC001	Place	Randy	Male	7	2nd Grade
INIPLAC001	Placid	Inga	Female	7	2nd Grade
NEWTST001	Reeval	Eva	Female	7	2nd Grade

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**.



**New Caseload Group**

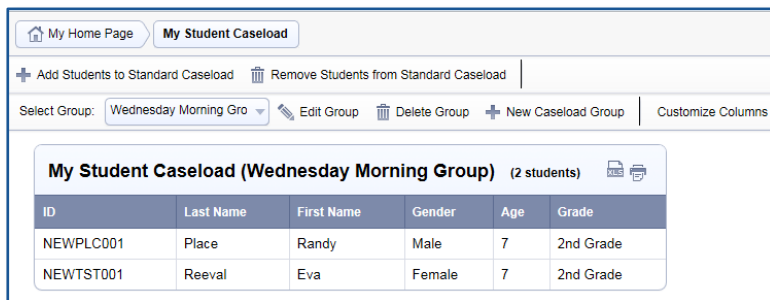
Group Name:

Select the students to be in this caseload group:

<input type="checkbox"/>	ID	Last Name	First Name	Gender	Age	Grade
<input checked="" type="checkbox"/>	NEWPLC001	Place	Randy	Male	7	2nd Grade
<input type="checkbox"/>	INIPLAC001	Placid	Inga	Female	7	2nd Grade
<input checked="" type="checkbox"/>	NEWTST001	Reeval	Eva	Female	7	2nd Grade

**Accept**

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



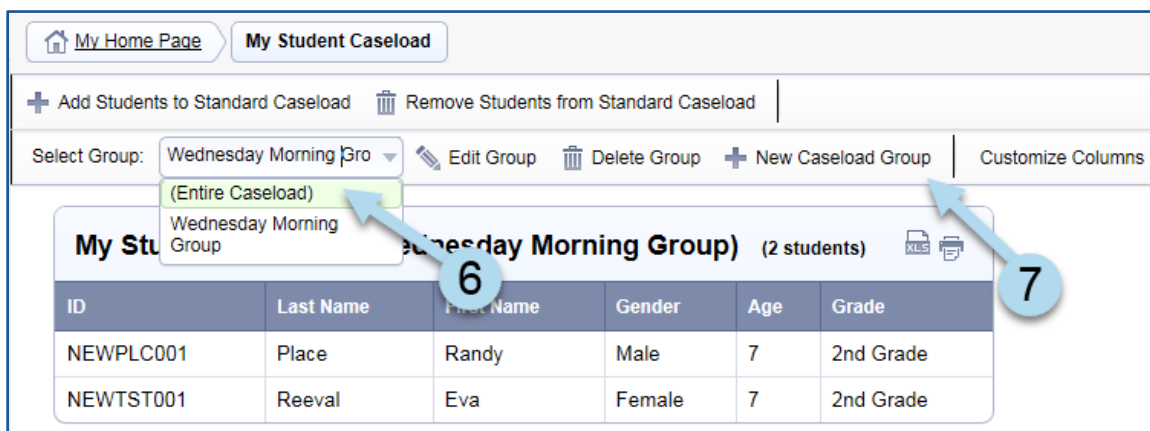
My Student Caseload

Select Group:

**My Student Caseload (Wednesday Morning Group)** (2 students)

ID	Last Name	First Name	Gender	Age	Grade
NEWPLC001	Place	Randy	Male	7	2nd Grade
NEWTST001	Reeval	Eva	Female	7	2nd Grade

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



My Student Caseload

Select Group:

(Entire Caseload)  
Wednesday Morning Group

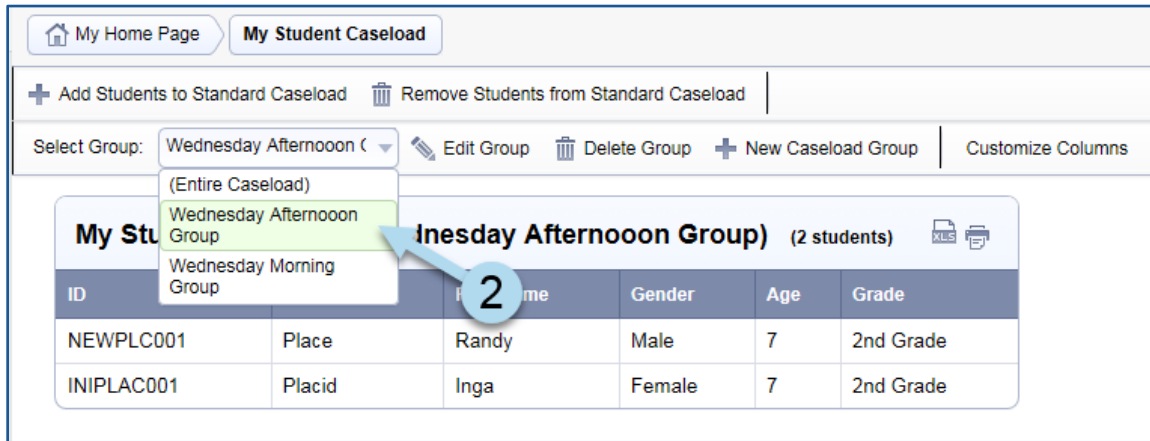
**My Student Caseload (Wednesday Morning Group)** (2 students)

ID	Last Name	First Name	Gender	Age	Grade
NEWPLC001	Place	Randy	Male	7	2nd Grade
NEWTST001	Reeval	Eva	Female	7	2nd Grade

8. Repeat steps 3, 4, and 5 above.

## Managing Existing Caseload Groups

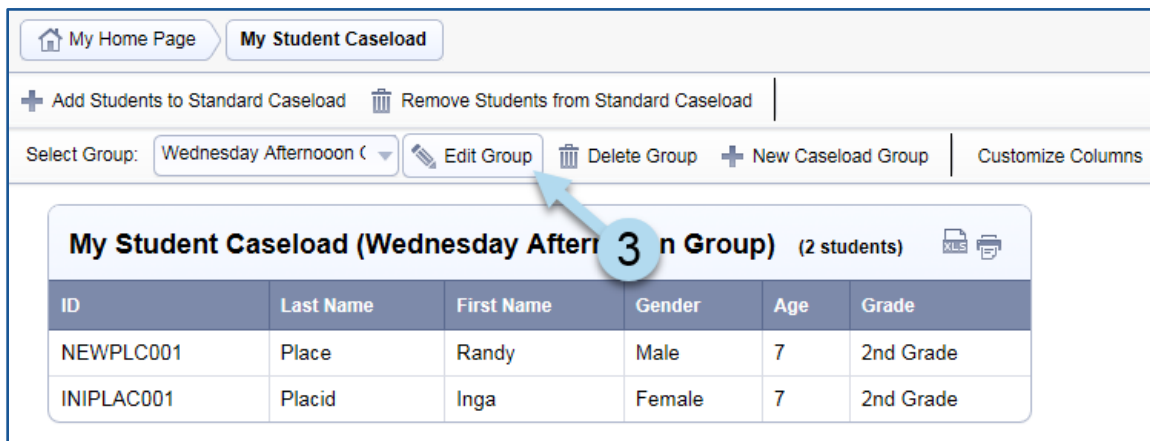
1. Navigate to the *My Students* section at the bottom of your homepage, and then click **Edit**.
2. Select the group that you want to edit from the *Select Group* dropdown menu.



The screenshot shows the 'My Student Caseload' interface. At the top, there are navigation buttons for 'My Home Page' and 'My Student Caseload'. Below that, there are two main actions: '+ Add Students to Standard Caseload' and 'Remove Students from Standard Caseload'. A 'Select Group:' dropdown menu is open, showing options: '(Entire Caseload)', 'Wednesday Afternoon Group' (highlighted in green), and 'Wednesday Morning Group'. To the right of the dropdown are buttons for 'Edit Group', 'Delete Group', '+ New Caseload Group', and 'Customize Columns'. Below the dropdown, the title of the selected group is 'Wednesday Afternoon Group) (2 students)'. A table lists the students in the group:

ID	Last Name	First Name	Gender	Age	Grade
NEWPLC001	Place	Randy	Male	7	2nd Grade
INIPLAC001	Placid	Inga	Female	7	2nd Grade

3. Click **Edit Group**.



The screenshot shows the 'My Student Caseload' interface with the 'Edit Group' button highlighted. The title of the group is 'My Student Caseload (Wednesday Afternoon Group) (2 students)'. The table of students is the same as in the previous screenshot:

ID	Last Name	First Name	Gender	Age	Grade
NEWPLC001	Place	Randy	Male	7	2nd Grade
INIPLAC001	Placid	Inga	Female	7	2nd Grade

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.

### New Caseload Group

Group Name:  5

Select the students to be in this caseload group:

<input type="checkbox"/>	ID	Last Name	First Name	Gender	Age	Grade
<input checked="" type="checkbox"/>	NEWPLC001	Place	Randy	Male	7	2nd Grade
<input type="checkbox"/>	INIPLAC001	Placid	Inga	Female	7	2nd Grade
<input checked="" type="checkbox"/>	NEWTST001	Reeval	Eva	Female	7	2nd Grade

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## 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**.

[My Home Page](#)
My Student Caseload

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+ Add Students to Standard Caseload
Remove Students from Standard Caseload

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Select Group: Wednesday Afternoon
Edit Group
Delete Group
+ New Caseload Group
Customize Columns

---

**My Student Caseload (Wednesday Afternoon Group)** 3 (2 students)

ID	Last Name	First Name	Gender	Age	Grade
NEWPLC001	Place	Randy	Male	7	2nd Grade
INIPLAC001	Placid	Inga	Female	7	2nd Grade

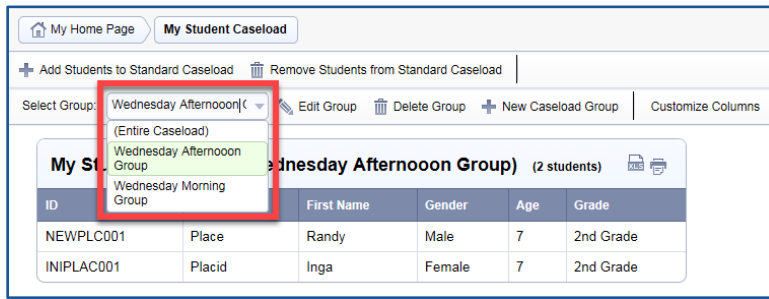
4. Click **OK** in the pop-up window.

? Are you sure you wish to delete the caseload group 'Wednesday Afternoon Group'?

**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

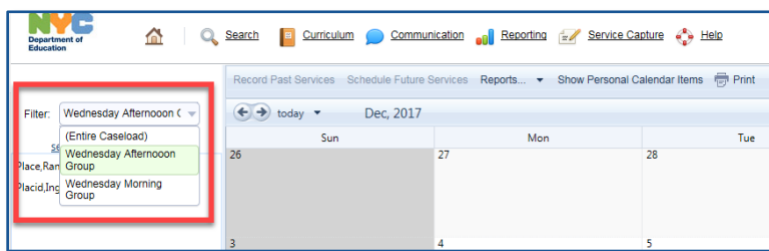
From your *My Student Caseload*, select the caseload group from the *Select Group* dropdown menu.



The screenshot shows the 'My Student Caseload' interface. At the top, there are navigation links for 'My Home Page' and 'My Student Caseload'. Below this, there are buttons for 'Add Students to Standard Caseload' and 'Remove Students from Standard Caseload'. A 'Select Group:' dropdown menu is open, showing three options: '(Entire Caseload)', 'Wednesday Afternoon Group', and 'Wednesday Morning Group'. The 'Wednesday Afternoon Group' is highlighted in green. Below the dropdown, there is a table with columns for 'ID', 'First Name', 'Gender', 'Age', and 'Grade'. The table contains two rows of student data.

ID	First Name	Gender	Age	Grade
NEWPLC001	Randy	Male	7	2nd Grade
INIPLAC001	Inga	Female	7	2nd Grade

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



The screenshot shows the 'Service Calendar' interface. At the top, there are navigation links for 'Curriculum', 'Communication', 'Reporting', 'Service Capture', and 'Help'. Below this, there are buttons for 'Record Past Services', 'Schedule Future Services', and 'Reports...'. A 'Filter:' dropdown menu is open, showing three options: '(Entire Caseload)', 'Wednesday Afternoon Group', and 'Wednesday Morning Group'. The 'Wednesday Afternoon Group' is highlighted in green. Below the dropdown, there is a calendar grid for December 2017. The calendar shows dates from 26 to 31, with columns for Sun, Mon, and Tue.