Creating and Managing Caseload Groups

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Introduction

This training guide provides instructions to create, manage, and delete caseload groups within your My Students panel.

Creating a New Caseload Group

1. Navigate to the My Students panel at the bottom of your homepage and 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 student(s) to be included in the group.

5. Click **Accept**.

![New Caseload Group](image)

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

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

7. Click **New Caseload Group**.

![My Home Page > My Student Caseload](image)

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

1. Navigate to the My Students panel at the bottom of your homepage and click Edit.

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

3. Click Edit Group.

4. Your entire caseload displays with the students currently identified for this group. The students are checked and highlighted in green.
5. **Uncheck** 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 a group, they will remain on your entire caseload. If you delete a student from your entire caseload, they will automatically be removed from any existing groups.

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**Deleting an Existing Caseload Group**

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

2. Select the **group** you want to delete from the Select Group dropdown.

3. Click **Delete Group**.
4. Click OK in the pop-up window.

![Image of pop-up window]

**Note:** Deleting a caseload group does not remove the students from your caseload. Students may be added to multiple caseload groups.

**Selecting a Caseload Group**

1. From the *My Students* panel, select the **caseload group** from the *Select Group* dropdown menu.

![Image of My Students panel]

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

![Image of Service Calendar]

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