

This training guide provides you with the steps to follow 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 Home Page, and then click **Edit**.

ID	Last Name	First Name	Gender	Age	Grade
ASSESS420	Assessment	Annie	Female	13	5th Grade
ANNPNP8	Commuto	Ariana	Female	13	5th Grade
DEMO100	Demo	Danny	Male	13	5th Grade
INPILOT10	Inpilot	Patricio	Male	13	5th Grade
SPED12	Jones	Mary	Female	14	5th Grade
SPECIAL168	Nieves	Ian	Male	10	2nd Grade

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

ID	Last Name	First Name	Gender	Age	Grade
ASSESS420	Assessment	Annie	Female	13	5th Grade
ANNPNP8	Commuto	Ariana	Female	13	5th Grade
DEMO100	Demo	Danny	Male	13	5th Grade
INPILOT10	Inpilot	Patricio	Male	13	5th Grade
SPED12	Jones	Mary	Female	14	5th Grade
SPECIAL168	Nieves	Ian	Male	10	2nd Grade
REVALPG170	Place	Reggie	Male	13	5th Grade
READMIT50	Readmit	Reggie	Male	13	5th Grade
CSP12	Serve	Christopher	Male	13	5th Grade
TRANSFER52	Transfer	Ineeda	Female	13	5th Grade

3. Enter a name for the group.
4. Place a checkmark in the box located left of the students to be included in the group.
5. Click **Accept**.

Group Name:

Select the students to be in this caseload group:

ID	Last Name	First Name	Gender	Age	Grade	
<input type="checkbox"/>	ASSESS420	Assessment	Annie	Female	13	5th Grade
<input checked="" type="checkbox"/>	ANNPNP8	Commuto	Ariana	Female	13	5th Grade
<input type="checkbox"/>	DEMO100	Demo	Danny	Male	13	5th Grade
<input type="checkbox"/>	INPILOT10	Inpilot	Patricio	Male	13	5th Grade
<input type="checkbox"/>	SPED12	Jones	Mary	Female	14	5th Grade
<input checked="" type="checkbox"/>	SPECIAL168	Nieves	Ian	Male	10	2nd Grade
<input checked="" type="checkbox"/>	REVALPG170	Place	Reggie	Male	13	5th Grade
<input type="checkbox"/>	READMIT50	Readmit	Reggie	Male	13	5th Grade
<input type="checkbox"/>	CSP12	Serve	Christopher	Male	13	5th Grade
<input type="checkbox"/>	TRANSFER52	Transfer	Ineeda	Female	13	5th Grade

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

ID	Last Name	First Name	Gender	Age	Grade
ANNPNP8	Commuto	Ariana	Female	13	5th Grade
SPECIAL168	Nieves	Ian	Male	10	2nd Grade
REVALPG170	Place	Reggie	Male	13	5th Grade

- To create another caseload group, first select “Entire Caseload” from the *Select Group* dropdown; and then click **New Caseload Group**. Repeat steps 3, 4, and 5 above.

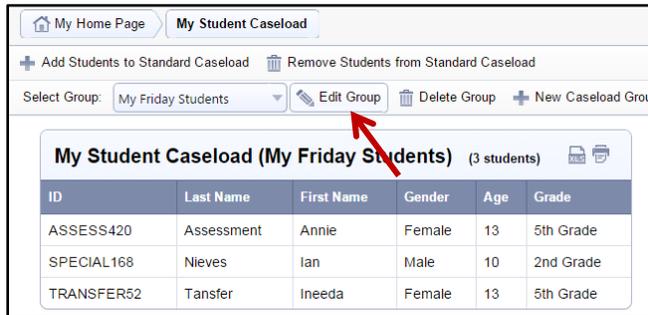
ID	Last Name	First Name	Gender	Age	Grade
ANNPNP8	Commuto	Ariana	Female	13	5th Grade
SPECIAL168	Nieves	Ian	Male	10	2nd Grade
REVALPG170	Place	Reggie	Male	13	5th Grade

## Managing existing Caseload Groups

- Navigate to the *My Students* section at the bottom of your Home Page, and then click **Edit**.
- Select the group that you want to update from the *Select Group* dropdown.

ID	Last Name	First Name	Gender	Age	Grade
ASSESS420	Assessment	Annie	Female	13	5th Grade
ANNPNP8	Commuto	Ariana	Female	13	5th Grade
DEMO100	Demo	Danny	Male	13	5th Grade
INPILOT10	Inpilot	Patricio	Male	13	5th Grade
SPED12	Jones	Mary	Female	14	5th Grade
SPECIAL168	Nieves	Ian	Male	10	2nd Grade
REVALPG170	Place	Reggie	Male	13	5th Grade
READMIT50	Readmit	Reggie	Male	13	5th Grade
CSP12	Serve	Christopher	Male	13	5th Grade
TRANSFER52	Tansfer	Ineeda	Female	13	5th Grade

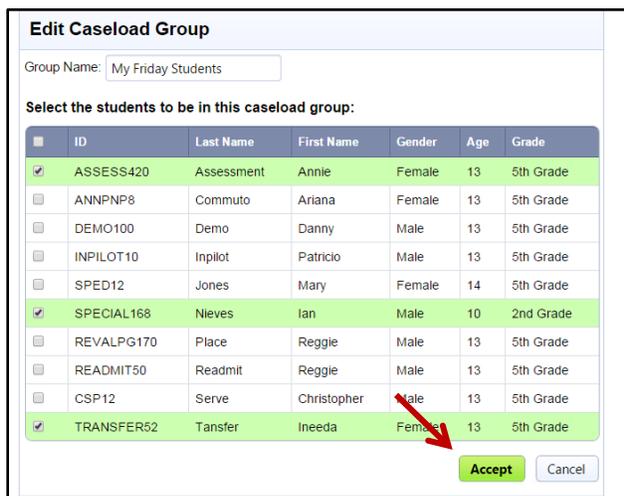
### 3. Click **Edit Group**.



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

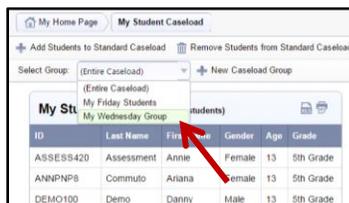
4. Deselect a student in the group if appropriate and/or place a checkmark for new students.
5. You can also change the name for the group.
6. Click **Accept** when you have completed your edits.

**Note:** If you delete a student from your 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 Home Page, and then click **Edit**.
2. Select the group that you want to delete from the *Select Group* dropdown.



3. Click **Delete Group**; and then click **OK** in the pop-up window.

The screenshot shows the 'My Student Caseload' page for 'My Wednesday Group'. The table contains the following data:

ID	Last Name	First Name	Gender	Age	Grade
ANNPNP8	Commuto	Ariana	Female	13	5th Grade
SPECIAL168	Nieves	Ian	Male	10	2nd Grade
REVALPG170	Place	Reggie	Male	13	5th Grade

### Notes:

- Deleting a caseload group does not impact the students on your caseload.
- To remove a student from your caseload, click on **Remove Students from Standard Caseload**.
- Students can be added to multiple caseload groups.

## Selecting a Caseload Group from your Service Calendar

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

The left screenshot shows the 'Filter' dropdown menu with the following options: (Entire Caseload), (Entire Caseload), My Friday Students, My Monday Afternoon Group, Demo,Danny (DEMO100), Inpilot,Patricio (INPILOT10), Jones,Mary (SPED12), Nieves,Ian (SPECIAL168), Place,Reggie (REVALPG170), Serve,Christopher (CSP12), and Transfer,Ineeda (TRANSFER52). The 'My Monday Afternoon Group' option is highlighted with a red box and a red arrow points to it.

The right screenshot shows the calendar filtered to show only students from 'My Monday Afternoon Group'. The 'Filter' dropdown now shows 'My Monday Afternoon Gr'. The list of students includes: Demo,Danny (DEMO100), Jones,Mary (SPED12), and Tansfer,Ineeda (TRANSFER52).