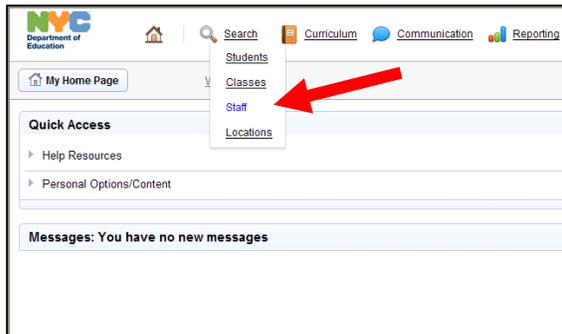


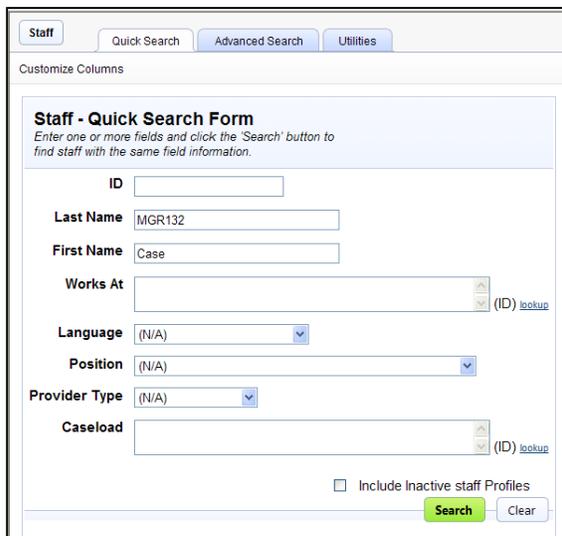
This guide, for those SESIS roles permissioned demonstrates how to add or remove a student to a provider's caseload.

### Displaying a Provider's Caseload

1. Log in to SESIS and from the **Search** link in the top navigation bar, click **Staff**.



2. In the Staff – Quick Search Form input the Last Name and First Name of the provider and click **Search**.



3. In the Search Results screen, click the folder icon located in the left margin adjacent to the provider's name to display his/her SESIS Profile.



ID	Last Name	First Name	Works At	Provider Type	Position	Lang
MGR132	Mgr132	Case	PS 071 Rose E Scala	DOE		

## Adding a Student to a Caseload

- In the provider's Profile click on the **Main** menu, and click **Caseload** to display the provider's caseload.

The screenshot shows the provider profile for 'Case Mgr132 (MGR132)'. The 'Main' menu is expanded, and the 'Caseload' option is highlighted with a red arrow. Other menu options include 'QA View', 'Service Records', and 'Work Information'. The profile details include ID: MGR132, First Name: Case, Last Name: Mgr132, and Work Phone Number: 555 555 5555.

- From the **Setup** menu click **Add to Caseload**.

The screenshot shows the 'Caseload' setup menu for 'Case Mgr132 (MGR132)'. The 'Setup' dropdown menu is open, and 'Add to Caseload' is highlighted with a red arrow. Other options are 'Delete From Caseload' and 'Transfer to Other Caseload'. Below the menu is a table of existing caseloads:

ID	Last Name	First Name	Gender	Age	Grade	Caseload Type	is From Legacy
ANN132	Cook	Ann	Female	19	9th Grade		No
ANN883	Cook	Ann	Female	19	9th Grade		No

- Use the Students Quick Search Form to display the student to be added to the caseload. For example, input the student's NYCID or Last and First Name, and click **Search**.

The screenshot shows the 'Students Quick Search Form' for 'Case Mgr132 (MGR132) > Caseload'. The form has two tabs: 'Quick Search' and 'Advanced Search'. The 'Quick Search' tab is active. The 'Last Name' field contains 'Leach' and the 'First Name' field contains 'Flora', both highlighted with red arrows. Other fields include 'School', 'Birth Date', 'Gender', 'Grade', 'Delegated School', 'School Delegated Physical', and 'Receiving School', each with a '(ID) lookup' button.



- In the search results that appear, click the checkbox in the left margin adjacent to the student to be added to the caseload, and click the green bar **Add Students Marked Below to Caseload**. The green color in the student row will fade to a lighter shade of green to indicate the student has been added to the caseload.

← Case Mgr132 (MGR132) > Caseload		Add To Caseload Using: <a href="#">Advanced Search</a>		Results		
<b>Add Students Marked Below to Caseload</b>						
<input checked="" type="checkbox"/>	ID	Last Name	First Name	Gender	Age	Grade
<input checked="" type="checkbox"/>	31017277	Leach	Flora	Female	15	4th Grade
<b>Add Students Marked Above to Caseload</b>						

To return to the caseload and confirm the addition, click **(Staff Name) > Caseload** at the top of the screen.

## Removing a Student from a Caseload

1. In the provider's Profile click on the **Main** menu, and click **Caseload** to display the provider's caseload.

2. From the **Setup** menu click **Delete From Caseload**.

ID	Last Name	First Name	Gender	Age	Grade	Caseload Type	is From Legacy
ANN132	Cook	Ann	Female	19	9th Grade		No
ANN883	Cook	Ann	Female	19	9th Grade		No

3. Click the checkbox adjacent to each student to be removed. When selected, the background of the selected student row will turn to a faded green to indicate the student will be removed. Click **Delete Checked Items**, and the selected student will be removed from the provider's caseload.

ID	Last Name	First Name	Gender	Age	Grade	Caseload Type	is From Legacy
<input checked="" type="checkbox"/>	ANN132	Cook	Ann	Female	19	9th Grade	No
<input type="checkbox"/>	ANN883	Cook	Ann	Female	19	9th Grade	No

4. An alert message will display to confirm the deletion. Click **OK** to remove the student.

5. The caseload will then redisplay without the deleted student.

ID	Last Name	First Name	Gender	Age	Grade	Caseload Type	is From Legacy
ANN883	Cook	Ann	Female	19	9th Grade		No