# Adding or Removing Students on My Caseload



THE SESIS TEAM | Ensuring all students have access. Together we can!

# Adding or Removing Students on My Caseload

### Introduction

This training guide provides instruction on <u>Adding</u> or <u>Removing</u> students from My Student Caseload.

### Adding a Student to your Caseload

1. If you are assigned more than one school, you will need to select the location of the student you are adding from the Your Current Location dropdown menu on the homepage.



2. From the My Students caseload panel, click Edit to display the caseload management options.

My Students (2)	🗞 Edit 😴 🔂 🛛 📿	
	ID V	Last Name

3. Click +Add Students to Standard Caseload. The Students Quick Search Form will open.

1	My Home Page My Student Caseload									
+ Add Students to Standard Caseload 💮 Remove Students fr										
	My Stu	dent Cas	eload (2	students)		Ē				
3.		Last Name	First Name	Gender	Age	Gr				
	UPGR131	Upgrade	Ursula	Female	11	5tł				
	UPGR140	Upgrade	Ursula	Female	11	5tł				

4. Type the student's information into the *Students Quick Search Form*, and then click **Search** to display the student list. It is best practice to enter the student *ID* when possible.

Students Quid Enter one or more file find Students with the	<b>ck Search Form</b> elds and click the 'Search' button to e same field information.
ID	
Last Name	
First Name	
Birth Date	Between 🗟 and 🗟 (inclusive)
Gender	(N/A) <b>v</b>
Grade	(N/A) <b>v</b>
Additional Admin	
	(ID) lookup
Receiving Admin	
	(ID) <u>lookup</u>
	4 Search

- 5. Check the box to the left of the student(s) to be added. The background of the selected student will turn to a faded green.
- 6. Click Add Students Marked Below to Standard Caseload or Add Students Marked Above to Standard Caseload



A note will briefly display to confirm the caseload addition.



Note: To add another student to the caseload, click Add Students Using: Quick Search, and repeat steps 4 – 6

7. To return to your caseload, click My Students Caseload to verify the student was added.

My Home	Page My Students Caseload	Quick Search Advanced Search
🔸 Add St	udents Marked Below to Stand	dard Caseload
~	ID	Last Name
	UPGR132	Upgrade
1 Add St	udents Marked Above to Stand	dard Caseload

**Note**: After the student is on your caseload, you may record services provided to that student using Encounter Attendance in SESIS.

#### Removing a Student from your Caseload

1. From the homepage My Students caseload panel, click **Edit** to display the caseload management options.

My Students (3)	🗞 Edit 🐨 💼 🚺	
	D	Last Name

2. Click Remove Student from Standard Caseload.

÷	+ Add Students to St 2 Caseland m Remove Students from Standard Caseload								
	My Student Caseload (3 students)								
	ID	Last Name	First Name	Gender	Age	Grade			
	UPGR131	Upgrade	Ursula	Female	11	5th Grade			
	UPGR132	Upgrade	Ursula	Female	11	5th Grade			

- 3. Check the box to the left of each student to be removed. The background of the selected student(s) will turn to a faded green.
- 4. Click **Remove Students Marked Below from Standard caseload** or **Remove Students Marked Above from Standard Caseload** to immediately remove the student from your caseload.

1	My Home Page My Student Caseload Remove Students from Standard Caseload							
	Remove Students Marked Below from Standard Caseload							
	3	ID	Last Name	First Name	Gender	Age	Grade	
	0	UPGR131	Upgrade	Ursula	Female	11	5th Grade	
		UPGR132	Upgrade	Ursula	Female	11	5th Grade	
		UPGR140	Upgrade	Ursula	Female	11	5th Grade	
	1 Remove Students Marked Above from Standard Caseload							

5. Click My Student Caseload to return to your caseload to verify the student was removed.

😭 My	Home Page	My Studer	t Caseload		5	from Sta	ndard Caseloa	ad
4								
•	ID	Last Name	First Name	Gender	Age	Grade		
	UPGR131	Upgrade	Ursula	Female	11	5th Grade		
	UPGR140	Upgrade	Ursula	Female	11	5th Grade	]	
$\uparrow$	Remove Stud	lents Marke	d Above fro	m Standa	rd Cas	eload		