

Adding or Removing Students on My Caseload



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

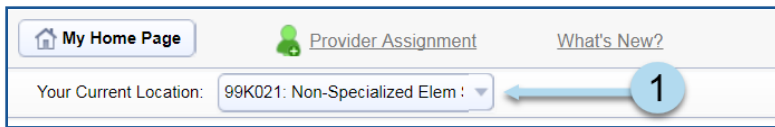
Adding or Removing Students on My Caseload

Introduction

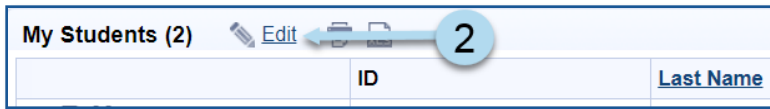
This training guide provides instruction on [Adding](#) or [Removing](#) students from *My Student Caseload*.

Adding a Student to your Caseload

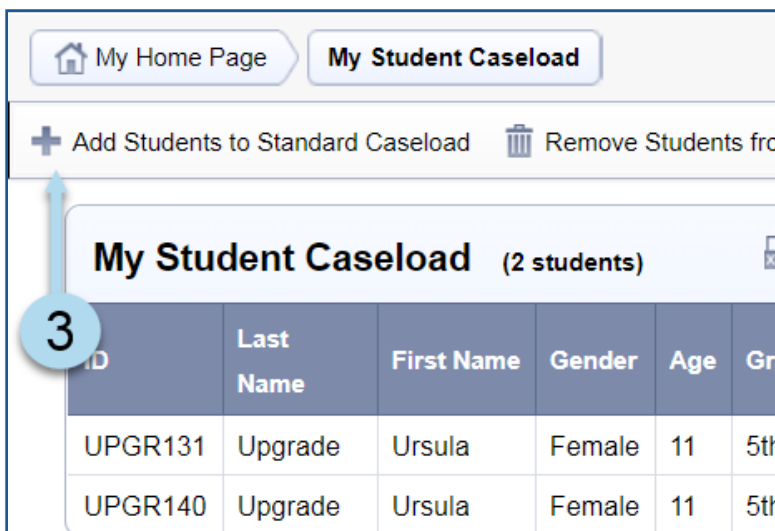
1. If you are assigned more than one school, you will need to select the location of the student you are adding from the *Your Current Location* dropdown menu on the homepage.



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



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



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 Quick Search Form
Enter one or more fields and click the 'Search' button to find Students with the same field information.

ID

Last Name

First Name

Birth Date Between and (inclusive)

Gender (N/A)

Grade (N/A)

Additional Admin (ID) [lookup](#)

Receiving Admin (ID) [lookup](#)

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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**

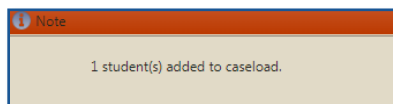
5 **6**

ID	Last Name
UPGR132	Upgrade

Add Students Marked Below to Standard Caseload

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.

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My Students Caseload **Add Students** Quick Search Advanced Search

Add Students Marked Below to Standard Caseload

ID	Last Name
UPGR132	Upgrade

Add Students Marked Above to Standard Caseload

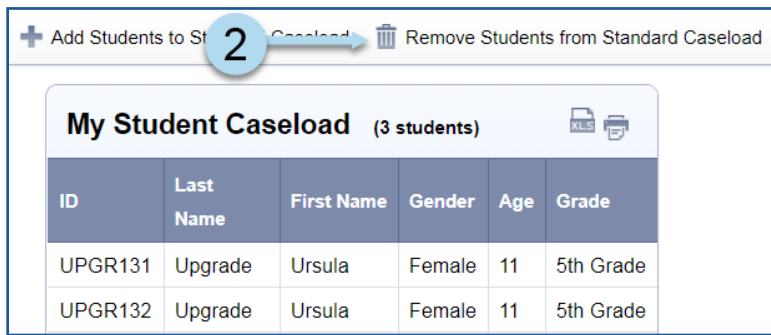
Note: After the student is on your caseload, you may record services provided to that student using Encounter Attendance in SESIS.

Removing a Student from your Caseload

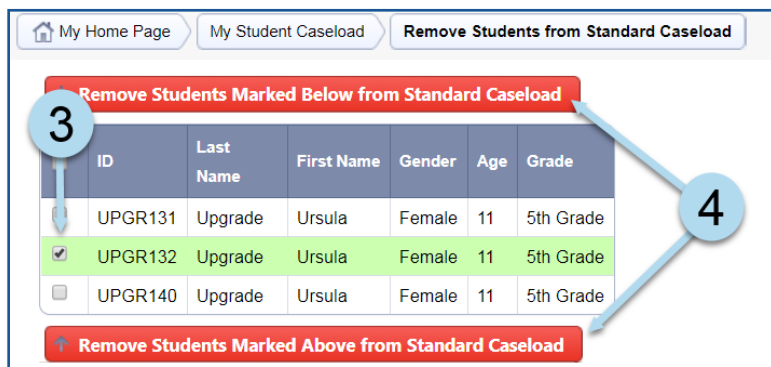
1. From the homepage *My Students* caseload panel, click **Edit** to display the caseload management options.



2. Click **Remove Student from Standard Caseload**.



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.



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

