CASELOAD SETUP WIZARD

Accessing the Caseload Setup Wizard

1. Click on the "Wizard" tab at the top of the page in the green navigation bar
2. Click on the "Caseload Setup Wizard" link
3. Select the appropriate Caseload Domain ("Section 504" or "Special Education")

Adding a Student to a Caseload

1. Click on the "Add More Students to Caseload" button
2. Search for students by providing criteria such as last name or Student ID. Click 'View Students'
3. Select the student(s) to add to the caseload by selecting the appropriate check box based on whether you are a team member only, or the student's Special Education or 504 coordinator, or case manager
4. Scroll to the bottom and click 'Update the Database' to save your selection(s)

Removing a Student from a Caseload

1. To remove a student from your caseload, uncheck the box next to the student's name and click 'Update the Database' button.
2. IF the student is a 504 or Special Education but not showing when you select the appropriate Caseload Domain, go back and select the other choice. The student may have had your name indicated on a previous IEP or 504 plan that has not been inactivated

CASELOAD ADMINISTRATION WIZARD

Accessing the Caseload Administration Wizard

1. Click on the "Wizard" tab at the top of the page in the green navigation bar
2. Click on the "Caseload Administration Wizard" link
3. Search for the user whose caseload you are looking to adjust
4. Select the applicable Caseload Domain and click "Go to Users Caseload"

Removing Students from a Caseload

1. Uncheck the box to the left of the desired student
2. Click on the button labeled "Update the Database"
3. Select "Yes, Remove Students from Caseload"

Adding Students to a Caseload

1. Click the button labeled "Add more Students to Caseload"
2. This takes you to the student search page
3. Enter information to find the desired student
4. Check the box to the left of the student you would like to add
5. Either "Add Students to Caseload" or "Add Students to Caseload, then Find More"

Transferring a Caseload from One User to Another

1. Note that only users who have permission to access these students will be available to have the caseload transferred to them. Ensure that the receiving user is assigned to the correct school and has the necessary permissions
2. At the bottom of the user's caseload page, select "Transfer/Copy Caseload to Another User"

   Note that this will transfer or copy ALL students on the current user's list
3. Select Copy or Transfer and the user to receive the students
   a. Copy: all students will remain on the original user's caseload and be added to that of the new user as well. This will not work where the current user is the case manager
   b. Transfer: all students will be removed from the original user's caseload and added to that of the new user. This will work where the current user is the case manager
4. Click "Review Students and Continue"