



# Managing Your Caseload

## Setting Up & Viewing Your Caseload

Each TOR/Case Manager sets up his/her own caseload by using the Caseload Setup Wizard

- 1) Click "Wizards" on the Main Menu Bar
- 2) Click "Caseload Setup Wizard"
- 3) The system displays your current caseload for your review

Teacher of Record/C. Manager

## Adding Students to Your Caseload

If you would like to add students to your caseload

- 1) Click on "add more students to caseload"
- 2) Select search criteria by: grade, school, name, STN or status (just last name will typically work)
  - If the student you are searching for does not show up contact your office staff to determine if the STN# was moved to the current school.
- 3) Click "view students"
- 4) Check TOR or Team Member box for desired students
- 5) Click "add students to caseload" or "add student to caseload, then find more."

Teacher of Record/C. Manager

## Removing Students from Your Caseload

If you would like to remove students from your caseload

- 1) Click "Wizards" on the Main Menu Bar
- 2) Click "Caseload Setup Wizard"
- 3) The system displays your current caseload for your review
- 4) Uncheck the box of student to remove
- 5) Utilize the "Check None" button if applicable
- 6) Click "Update the Database"

Teacher of Record/Case Manager

**Keep your caseload accurate throughout the school year. This is important in order for students to be available for those who need access. If you are no longer a team member or the case manager it is important to remove these students from your caseload.**