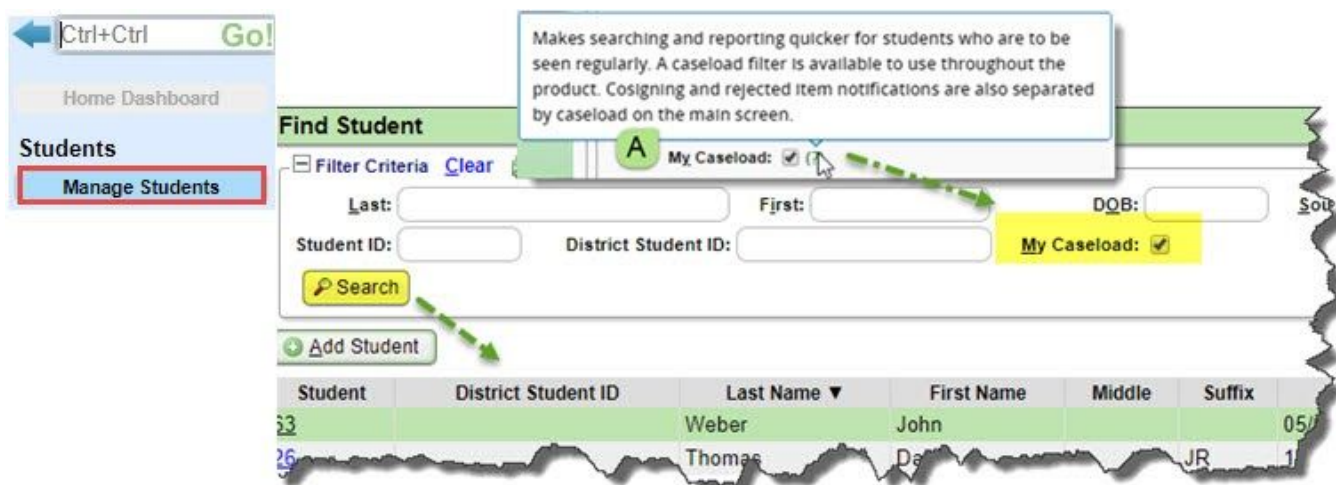


Find Existing Student and My Caseload	1
<b>How to Add a Student</b>	2
<b>Manage a Student</b>	2
Enter Service (1)	3
Enter Assessment (2)	3
Manage Referral (3)	3
IEP Minutes (4)	3
Service History (5)	3
Student Appointments (6)	3
Groups (7)	3
Mark Absent	3

## Find Existing Student and My Caseload

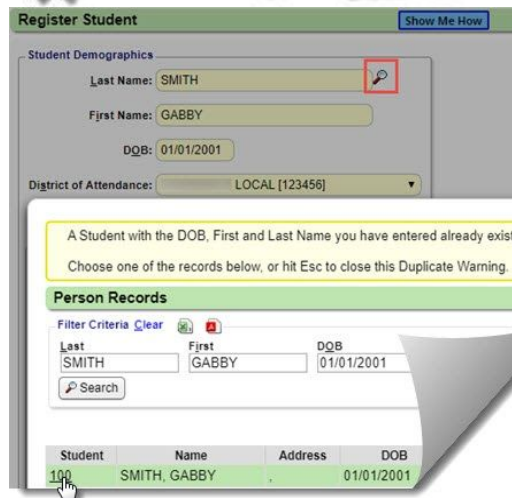
From the sidebar > Click Manage Students

Use filters to search or 'Find Student'. (A) Checkbox 'My Caseload' to create filters for your own work.



Alternatively,  
Click [Add Student] and use magnifying glass to lookup

Duplicate warning shows if the Student is already registered for this District. Click the ID of the existing record or close the popup if this is truly a new student.



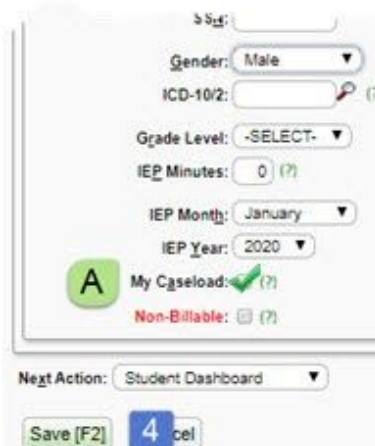
## How to Add a Student

From the sidebar >

1. Click 'Manage Students'
2. From the 'Find Student' page > [Add Student]



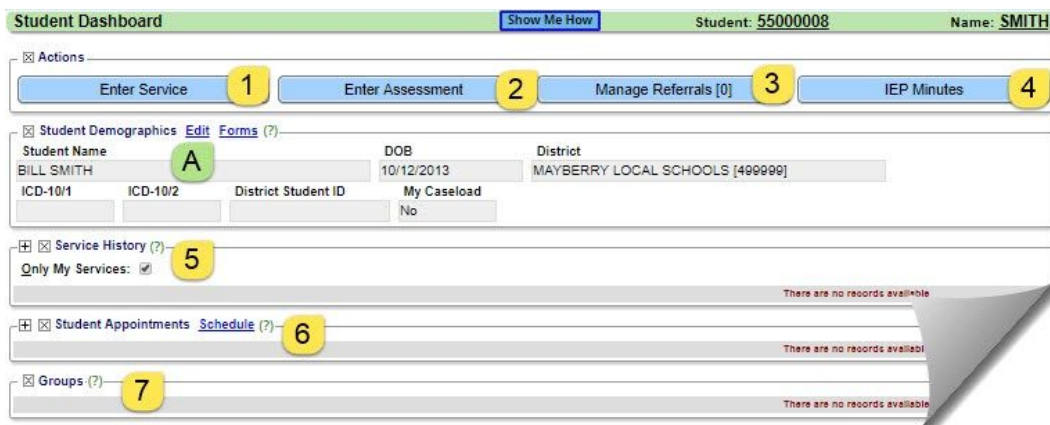
3. Fill in required fields
  - A. check 'My Caseload' to add a filter for your own students
4. [Save]



## Manage a Student

Add or lookup an existing Student to open the Student Dashboard to manage their services.

- A. To add to your caseload 'Click Edit' > check 'add to Caseload'



## Enter Service (1)

- Key in all required fields
- Use person icon to add students or arrow to copy previous notes
- [Save]

\*Assessments can also be documented from this screen

## Enter Assessment (2)

\*May be documented on 'Enter Service' tab

## Manage Referral (3)

[Add] enter details > [Save]. Click Pen Icon to Edit existing

## IEP Minutes (4)

Add Minutes

## Service History (5)

Edit, View or Delete services

## Student Appointments (6)

View or make appointment

## Groups (7)

View or create Groups

## Mark Absent

From the sidebar > Click Absence Documentation

Chose date, Use icons to mark all absent or specific Students absent > Save