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Using Student Utilities to Mass Assign Case Managers

- To manually assign a Case Manager, you must either edit the Case Manager field on the Special Education profile for the student – or ---
- Use Student Utilities to mass Replace the Case Manager Field.

Please note, you cannot assign Case Managers from the Staff Caseload or Student Caseload profile page. This caseload assignment is only used for Standard Caseloads (Service Providers).

1. Select Administration > Utilities > Student > Replace Field.
2. In the Formula selection, recommend searching by School for students who have an exceptionality (see below).
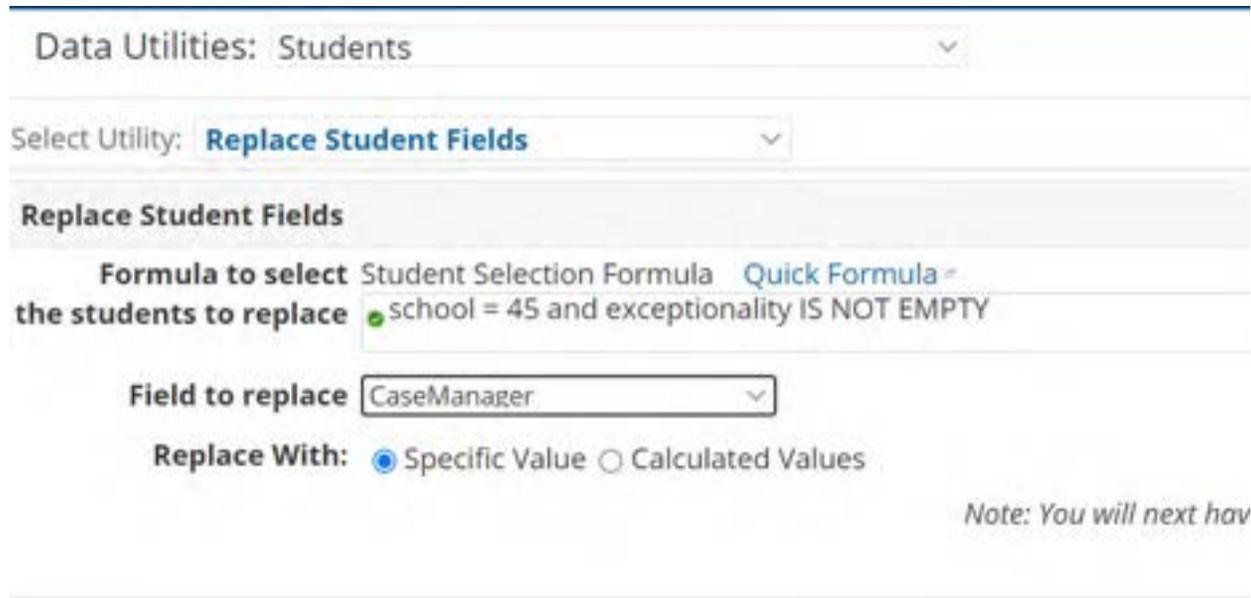
3. Select Continue.

Other formulas:

- To search for all the students assigned to SETSADMIN who are active and are enrolled after August 1, 2021 will give you all your active students:

  o casemanager = setsadmin and status = active and enrollmentstartdate > 08/01/2021

- If you want to add a school or grade:

  o and grade = G06 and school = (add the school number)

On the Replace Field in Student Profile panel, select the Case Manager from the Lookup field.

4. Select the students from the list.
5. Select Replace Field for Students Checked Above.

6. Repeat for each Case Manager and School.