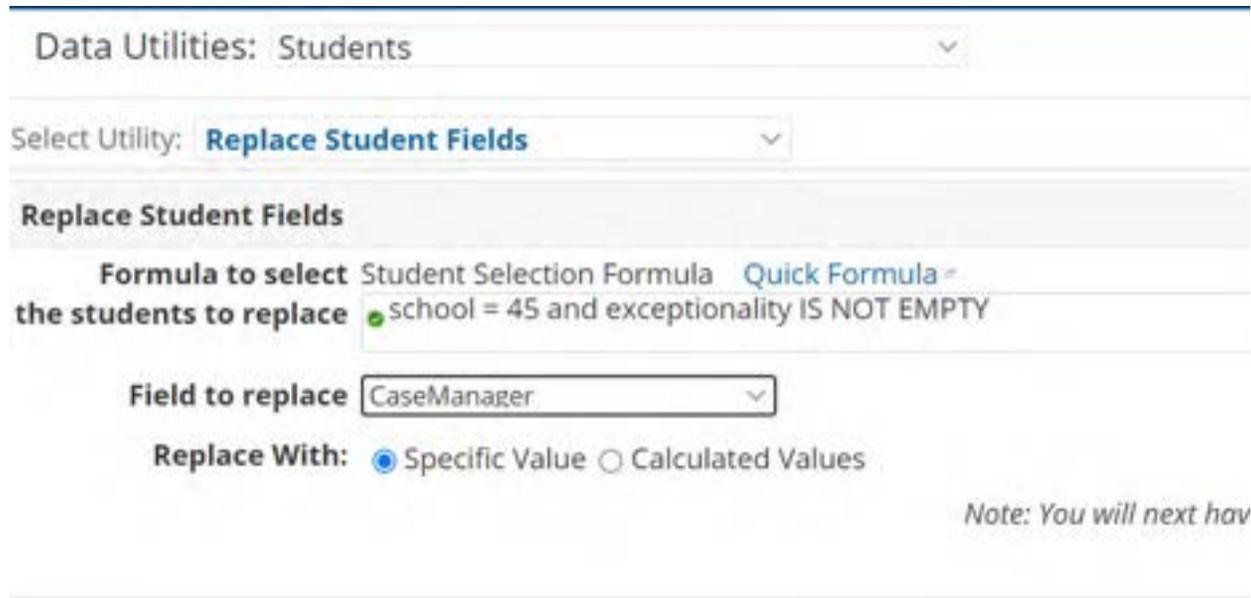


Using Student Utilities to Mass Assign Case Managers

- 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).



Data Utilities: Students

Select Utility: **Replace Student Fields**

Replace Student Fields

Formula to select the students to replace: Student Selection Formula **Quick Formula**

school = 45 and exceptionality IS NOT EMPTY

Field to replace: CaseManager

Replace With: Specific Value Calculated Values

Note: You will next hav

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:
 - `casemanager = setsadmin and status = active and enrollmentstartdate > 08/01/2021`

- If you want to add a school or grade:
 - `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.

Replace Field in Student Profiles

Enter the replacement value below:

Case Manager 2361 (Su: [redacted] 1) (I

Mark the student profiles that you want to replace field in below...

Page size: 10

<input type="checkbox"/>	ID	Last Name	First Name	Case Manager	Birth Date	Grade
<input checked="" type="checkbox"/>	1971915911	[redacted]	[redacted]	L	03/26/2012	Fourth g
<input type="checkbox"/>	1972028540	[redacted]	[redacted]	T	05/05/2010	Fifth gra
<input type="checkbox"/>	1969587755	[redacted]	[redacted]	S	03/18/2011	Fifth gra
<input type="checkbox"/>	1973003989	[redacted]	[redacted]	S	07/01/2013	Third gra
<input type="checkbox"/>	1972247892	[redacted]	[redacted]	T	01/03/2012	Fourth g
<input type="checkbox"/>	1973275561	[redacted]	[redacted]	E	11/11/2011	Third gra
<input type="checkbox"/>	1972310260	[redacted]	[redacted]	T	06/30/2011	Fifth gra
<input type="checkbox"/>	1973275728	[redacted]	[redacted]	T	03/30/2012	Fourth g
<input type="checkbox"/>	1974366567	[redacted]	[redacted]	E	03/10/2013	Third gra
<input type="checkbox"/>	1975272145	[redacted]	[redacted]	C	01/07/2013	Third gra

Page size: 10

3 Replace Field for Students Checked Above Replace Field for All 79 Students

6. Repeat for each Case Manager and School.