

There are a couple of ways that a Case Manager can be assigned in Student Services. Which method to use depends on district/school practices, as well as whether you're working with one or multiple students.

### Single Student with Existing Eligibility

If a student has transferred or transitioned to the school with an existing eligibility; or has an eligibility and requires a change of Case Manager, the change or new assign can be accomplished by selecting **Main Menu > Assign Case Manager**:

The screenshot shows the 'Assign Case Manager' window. At the top, there are fields for 'HSS' (Houston Secondary), 'Homeroom', and 'Grade'. A yellow 'Alert' button is visible. Below these are fields for 'Pupil Number' (220112), 'Usual Last Name' (Adam), 'Suffix', 'Preferred First Name' (Saleema), 'Middle Name', 'Age' (14-01), 'Gender' (F), and 'Birth Date' (14-AUG-1994). There are also fields for 'Ministry Designation' and 'Case Manager' (Cassandra, Su 56683). In the center, there are two red-bordered boxes: 'Current Case Manager' containing 'Cassandra, Su 56683' and 'Effective Date' containing '08-SEP-2008'. Below these is an 'End Date' field. At the bottom center is a red-bordered 'Assign/Re-assign' button. An arrow points from the 'Assign/Re-assign' button to the 'Current Case Manager' field.

If this student has a **Current Case Manager**, this would show on this screen. To change that assignment, or to create a new assignment for a student who does not have an existing Case Manager, click the "Assign/Re-assign" button at the bottom of the screen. The following screen displays:

The screenshot shows the 'Assign Case Manager' window after clicking the 'Assign/Re-assign' button. It features a 'NEXT Case Manager' field with a question mark icon, an 'Effective Date' field with a plus sign, and an 'End Date' field with a plus sign. Below these is a 'Reason for re-assignment' text area. At the bottom left, there is a red-bordered icon representing a document or list.

Using the "?" you can select the **Next Case Manager**, enter an **Effective Date**, and enter a reason for the re-assignment (optional). It is not necessary to enter an **End Date**. Be sure to click **Save** before exiting the screen.

## Multiple Students with Existing Eligibilities

In August or early September when you are assigning Case Managers to your transitioned students, a more expedient method than the one described above is to use the **Security by User** function from Student Services **Main Menu > SEW Security**. This is also a useful function when assigning all eligible students in a smaller school to a single Case Manager:

Pupil Number	Student's Name	Assign	Case Manager	Access Rights	Expires	Expiration Date
219721	<b>Durrance, Darko</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
219743	<b>Seabrooke, Gari</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
220112	<b>Adam, Saleema</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
220858	<b>Suttie, Hermine</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
221069	<b>Pablo, Buffy</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
221070	<b>Adema, Rosa</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
221104	<b>Wade, Pavel</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
221221	<b>Galanos, Lynne</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
219711	Keesey, Kendra	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
219716	Dubetz, Sandie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	

First select the staff member who will be the Case Manager, by clicking on the ? beside the **Staff Member/User** field. If the Case Manager has already been assigned to any students, these will display at the top of the list in bolded blue. Once you have completed the process, if you call up that staff member again, the new or additional students assigned to him/her will appear at the top of the list in blue followed by those unassigned in black.

Scroll the list of students putting a check mark in the **Assign** and in the **Case Manager** boxes for the appropriate students. If you do not want to enter an expiration date at this time, leave the **Expires** radio buttons set on the default **No**.

If you are in a school where the staff member is the Case Manager for all the students, you can quickly Mass Assign by choosing either or both the two buttons highlighted in red at the bottom of the screen. Using the **Assign all** function, or the individual **Assign** tick boxes, without also clicking the **Select as Case Manager for all** button or the **Case Manager** tick boxes can be used to enable teachers and other professionals to have access to students' Student Services' records.

**Note:** You will not be able to select the staff member and have that person appear in this screen if the staff member does not have, in addition to information correctly entered in Staff Maintenance, a BCeSIS user id and password with a security role. This is also true for Assigning Security by student referenced later in this document.

## Assigning a Case Manager through Student Review

When completing the **Student Review** process in BCeSIS (either directly from the Student Services Main Menu > Student Referrals/Reviews or from the Team Meeting > Student Review process) a Case Manager can be assigned in the **Outcomes** tab:

The screenshot shows the 'SEW - Student Review Details' window. At the top, there are fields for 'HSS Houston Secondary', 'Homeroom No Homeroom', and 'Grade 09'. Below this is a form for student information: Pupil Number (220112), Usual Last Name (Adam), Suffix, Preferred First Name (Saleema), Middle Name, Age (14-01), Gender (F), and Birth Date (14-AUG-1994). The 'Ministry Designation' is 'Autism Spectrum Disorder' and the 'Case Manager' is 'Cassandra, Su 56683'. The 'Outcome' tab is selected. A 'Forms' dialog box is open, asking 'Would you like to assign this Faculty Member as the student's Case Manager?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box.

When you select the staff member to be the **Person Responsible** for this student, a popup will appear asking if this is to be the student's Case Manager. Click **Yes** to complete the process and assign the selected staff member as this student's Case Manager.

## Assigning Security by Student

From the Student Services **Main menu**, select **SEW Security > Security by Student**. This screen enables either **Read Only** or **Read/Write** access to a student record. Use Read/Write to enable a user to create progress reports, assessment reports, or to complete and save any other form that the user has the security to access. **Note:** The person assigned as a Case Manager will display in blue.

The screenshot shows the 'SEW - SPED Security' window. At the top, there are fields for 'TES Telkwa Elementary School', 'Homeroom D1-Renee, McDonald 97022', and 'Grade 07'. Below this is a form for student information: Pupil Number (253268), Usual Last Name (Blancard), Suffix, Preferred First Name (Martin), Middle Name (Dewey), Age (12-06), Gender (M), and Birth Date (08-APR-1996). The 'Ministry Designation' is 'Learning Disability' and the 'Case Manager' is 'Treasure, Precious'. The 'Authorized Users' table is shown below:

User Name	Access Rights	Expires	Expire Date
Treasure, Precious	<input checked="" type="radio"/> Read Only <input checked="" type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
Renee, McDonald 97022	<input type="radio"/> Read Only <input checked="" type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	
	<input type="radio"/> Read Only <input type="radio"/> Read / Write	<input type="radio"/> No <input type="radio"/> Yes	

The 'Expires (Yes/No)' dropdown is also visible.