

# Principals: Create and Manage Caseloads

## Quick Reference Card

### CIITS: Managing Caseloads

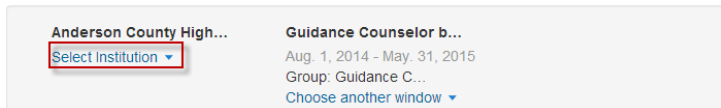
Users permissioned with Caseload Manager, and Leadership, can use the Observation Caseloads page to match teachers with peer observers for specified observation windows. Users with the “Observe all teachers at an institution” operation (typically principals), are already set up to observe any teacher at the school automatically and do not need to be set up here.

### Create an Observation Caseload

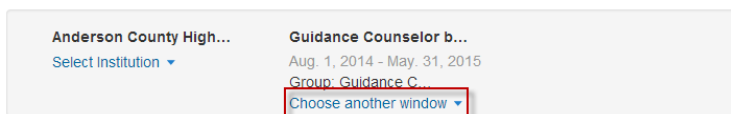
1. Roll your cursor over Educator Development on the navigation bar and click **Caseload Manager**



2. The institution will default to your CIITS default institution. Confirm that the correct institution is selected. If you need to change the institution, **Select Institution**



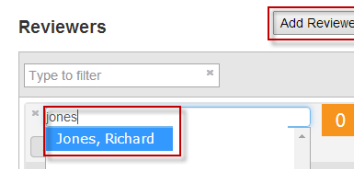
3. Select the window that identifies the role of the observer and who will be observed. To select a window click **Choose another window**



The following windows are available:

- **Teachers by Principal** – This window should be selected when observing Classroom Teachers
- **Teachers by Peer** – This window will only be used by Peer Observers
- **KTIP Intern by Resource Teacher** – This window will only be used by the Resource Teacher assigned to observe KTIP Interns **who are participating in the KTIP Pilot**
- **KTIP Intern by Principal** - This window should be selected when observing Interns **who are participating in the KTIP Pilot**
- **Instructional Coach by Supervisor** - This window should be used by Supervisors observing Instructional Coaches
- **Instructional Coach by Peer** - This window should be used by Peers observing Instructional Coaches
- **Library Media Specialist by Supervisor** - This window should be used by Supervisors observing Library Media Specialists
- **Library Media Specialist by Peer** - This window should be used by Peers observing Library Media Specialists
- **Therapeutic Specialist by Supervisor** - This window should be used by Supervisors observing Therapeutic Specialists
- **Therapeutic Specialist by Peer** - This window should be used by Peers observing Therapeutic Specialists
- **School Psychologist by Supervisor** - This window should be used by Supervisors observing School Psychologists
- **School Psychologist by Peer** - This window should be used by Peers observing School Psychologists
- **Guidance Counselor by Supervisor** - This window should be used by Supervisors observing Guidance Counselors
- **Guidance Counselor by Peer** - This window should be used by Peers observing Guidance Counselors

4. Click **Add Reviewer** and type the last name, first name of the Observer



- Select the teachers that you would like to add to your caseload.

#### Educators

Type to filter		
<input type="checkbox"/> Name	Observers	ID #
<input checked="" type="checkbox"/> ADKINS, MARY	0	
<input type="checkbox"/> ATHA, EDITH	0	
<input checked="" type="checkbox"/> BARKS, AMY	2	
<input type="checkbox"/> BARNES, ASHLEY	0	
<input type="checkbox"/> BUCKMAN, STEPHANIE	1	
<input checked="" type="checkbox"/> COSLOW, ASHLEY	0	
<input type="checkbox"/> CURRY, KAITLYN	0	

- Find the reviewer you are creating the caseload for on the right side of the screen. Click **Add Selected** and choose the Observer Type

Reviewers Add Reviewer

Type to filter

× Jones, Richard 0

Add Selected ▾

- Peer Observer
- Principal
- Assistant Princ...

Once you have created the caseload, the number next to the Reviewer's name will update to reflect the number of people assigned to the caseload.

Jones, Richard 3

Add Selected ▾

## Editing an Existing Caseload

- Expand the reviewer screen to display the Observers full caseload

Reviewers Add Reviewer

Type to filter

EVANS, JONES 23

Add Selected ▾

ABERNATHY, MATTHEW 4

Add Selected ▾

- Click the **X** next to the name you would like to remove from the caseload

Reviewers Add Reviewer

Type to filter

EVANS, JONES 23

Add Selected ▾

Principal

- ADKINS, MARY Saffell Street ...
- × ATHA, EDITH Saffell Street ...
- × BARKS, AMY Saffell Street ...
- × BARNES, ASHLEY Saffell Street ...
- × BUCKMAN, STEPHANIE Saffell Street ...

- Select the names of the users you wish to add. Next, click **Add Selected** and choose the Observer Type

Educators

Type to filter		
<input type="checkbox"/> Name	Observers	ID #
<input type="checkbox"/> ADKINS, MARY	1	011_7506
<input checked="" type="checkbox"/> ATHA, EDITH	1	011_5014
<input checked="" type="checkbox"/> BARKS, AMY	3	011_1032
<input type="checkbox"/> BARNES, ASHLEY	1	011_10616

Reviewers Add Reviewer

Type to filter

EVANS, JONES ID# 071\_83433 23

Add Selected ▾

- Peer Observer
- Principal
- Assistant Princ...
- Senior Leader...