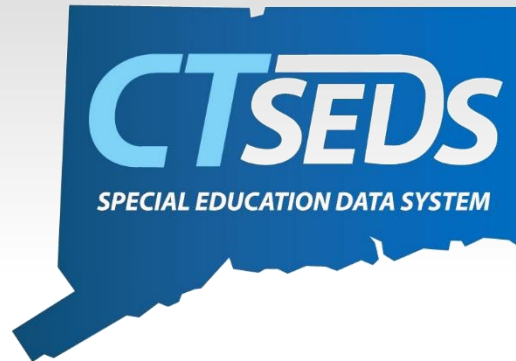


CT-SEDS Administrative Preview

Session #2 Users and Caseloads



Welcome

June 8th

Home Page and Orientation

- Dashboard and Widgets
- My Account tools
- Student Search

June 15th

Users and Caseloads

- User Types
- Adding/Inactivating Users
- Caseload Set-Up

June 22nd

Administrative Tasks

- District Calendar Management (Progress Report Periods, ESY)
- Schools Management
- Monitoring Imports

Topics Covered today

- User Types
 - User Permissions
 - Logging in for the first time
 - Adding/Inactivating Users
- Caseloads
 - User Caseload Setup
 - Caseload Administrative Wizard

Users and User Types

Available
User Types

User Types

School Personnel

Provider

Aggregate Provider

Special Ed Teacher

Student Team Leader

Aggregate Student Team Leader

Administrator/Certifier

Administrator (no R/S)

Aggregate Administrator/Certifier

District IT Administrator

OSEP Aggregate Data Manager

OSEP Aggregate District Administrator

Logging into CT-SEDS for the First Time

- Users can login to CT-SEDS starting on 7/1/2022.
- Users will use their email address and a temporary password to access the CT-SEDS system.
- Administrators in each district will receive login information to distribute to their staff members including the URL to their CT-SEDS site and the temporary password.
 - If staff have more than one email address, the one listed in the spreadsheet distributed should be used.

Manage Users

School: All Schools *

CSDE System Administrator Administrator (no R/S)

State General User Aggregate Administrator/Certifier

Aggregate Provider Special Ed Teacher

Aggregate Student Team Leader Student Team Leader

OSEP Aggregate Data Manager Provider

OSEP Aggregate District Administrator School Personnel

District IT Administrator State Compliance Monitor

Administrator/Certifier

User Type(s): *
(check none to match all)

User Last Name: Exact Match

User First Name: Exact Match

Title: Exact Match

User ID: Exact Match

Sort List By: User's Last Name *

VIEW USER(S)

VIEW PREVIOUS SEARCH RESULTS

ADD NEW USER

Manage Users

CT SEDS

STUDENTS ▾ TOOLS ▾ MY ACCOUNT ▾ ADMIN ▾ REPORTING

DISTRICT INFO DISTRICT CALENDAR SCHOOLS **USERS** INACTIVE USERS INACTIVE STUDENTS IMPORT HISTORY IMPORT SUMMARY DATA

CT Training District
ADMIN / USERS


Inactivate	CS	Cal	Name	User ID	School(s)	Students	Title	User Type	E-mail Address	Last Login
<input type="checkbox"/>			CM Eight	CM8	FHS	1, 1		CSDE Student Team Leader	CaseManagerEight@testemail.com	11/05/2021 14:48:00
<input type="checkbox"/>			CM Fifteen	CM15	BEM	0, 25	Case Manager	CSDE Student Team Leader	CM15test@gmail.com	05/17/2022 08:40:00
<input type="checkbox"/>			CM Five	CM5	BEM	24, 2		CSDE Student Team Leader	CaseManagerFive@TestEmail.com	06/10/2022 13:47:00
<input type="checkbox"/>			CM Four	CM4	FHS	12, 1		CSDE Student Team Leader	CaseManagerFour@TestEmail.com	11/16/2021 09:55:00
<input type="checkbox"/>			Studentteam1 Leader1	User10	BEM	0, 0	Student Team Leader	CSDE Student Team Leader	test10@gmail.com	
<input type="checkbox"/>			Studentteam2 Leader2	User11	BEM	0, 0	Student Team Leader	CSDE Student Team Leader	test11@gmail.com	
<input type="checkbox"/>			Studentteam3 Leader3	User12	BEM	0, 0	Student Team Leader	CSDE Student Team Leader	test12@gmail.com	
<input type="checkbox"/>			CM Nine	CMNine	BEM	6, 7		CSDE Student Team Leader	CaseManagerNine@testemail.com	01/10/2022 11:21:00
<input type="checkbox"/>			CM One	CM1	BEM	14, 10		CSDE Student Team Leader	CaseManagerOne@TestEmail.com	06/08/2022 14:35:00
<input type="checkbox"/>			CM Seven	CM7	BEM	9, 5		CSDE Student Team Leader	CaseManagerSeven@testemail.com	05/10/2022 11:57:00
<input type="checkbox"/>			CM Seventeen	CM17	BEM	3, 23	Case Manager	CSDE Student Team Leader	CM17Test@gmail.com	06/02/2022 19:52:00
<input type="checkbox"/>			CM Six	CM6	BEM, FHS	19, 6		CSDE Student Team Leader	CaseManagerSix@TestEmail.com	05/26/2022 14:14:00
<input type="checkbox"/>			CM Sixteen	CM16	BEM	3, 22	Case Manager	CSDE Student Team Leader	CM16Test@gmail.com	06/02/2022 17:57:00
<input type="checkbox"/>			CM Three	CM3	BEM	21, 1		CSDE Student Team Leader	CaseManagerThree@TestEmail.com	06/10/2022 15:52:00
<input type="checkbox"/>			CM Two	CM2	BEM, FHS	12, 0		CSDE Student Team Leader	CaseManagerTwo@TestEmail.com	01/13/2022 04:48:00

(15 Users)

INACTIVATE SELECTED USERS

ADD NEW USER

User Profile Page

Name:	First: <input type="text" value="CM"/>	Middle: <input type="text"/>	Last: <input type="text" value="Eight"/>	Suffix: <input type="text"/>	*
User Name:	<input type="text" value="CM8"/>				
User Code:	<input type="text" value="CM8"/> *				
Date of Birth:	<input type="text"/>		Gender:	<input type="text"/>	
Password:	<input type="text"/>				
Password (again):	<input type="text"/>				
User has Zendesk Agent account:	<input type="checkbox"/>				
Title:	<input type="text"/>				
Address:	<input type="text"/>				
City, State, ZipCode:	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Home Phone:	<input type="text"/>				
Work Phone:	<input type="text"/>				
E-Mail Address:	<input type="text" value="CaseManagerEight@testemail.com"/> *				

(See [How to choose a good password](#))

User Profile Page

User Type: ▼

Will Receive Transfer Notifications

Schools:

<input type="checkbox"/> Burr Elementary School	<input type="checkbox"/> Wise Intermediate Program	<input type="checkbox"/> Woodland Regional High School
<input checked="" type="checkbox"/> Farmington High School (APSEP)	<input type="checkbox"/> Wish Museum School	<input type="checkbox"/> Woodrow Wilson Bdlc
<input type="checkbox"/> Tracey Magnet School (APSEP)	<input type="checkbox"/> Wolcott Learning Center	<input type="checkbox"/> Woodside Intermediate School
<input type="checkbox"/> Winthrop Stem Elementary Magnet School	<input type="checkbox"/> Wolfpit School	

[How to](#)

Adding Users

CT SEDS

STUDENTS ▾ TOOLS ▾ MY ACCOUNT ▾ ADMIN ▾ REPORTING

DISTRICT INFO DISTRICT CALENDAR SCHOOLS **USERS** INACTIVE USERS INACTIVE STUDENTS IMPORT HISTORY IMPORT SUMMARY DATA

CT Training District
ADMIN / USERS

Inactivate	CS	Cal	Name	User ID	School(s)	Students	Title	User Type	E-mail Address	Last Login
<input type="checkbox"/>	●	📅	CM Eight	CM8	FHS	1, 1		CSDE Student Team Leader	CaseManagerEight@testemail.com	11/05/2021 14:48:00
<input type="checkbox"/>	○	📅	CM Fifteen	CM15	BEM	0, 25	Case Manager	CSDE Student Team Leader	CM15test@gmail.com	05/17/2022 08:40:00
<input type="checkbox"/>	●	📅	CM Five	CM5	BEM	24, 2		CSDE Student Team Leader	CaseManagerFive@TestEmail.com	06/10/2022 13:47:00
<input type="checkbox"/>	●	📅	CM Four	CM4	FHS	12, 1		CSDE Student Team Leader	CaseManagerFour@TestEmail.com	11/16/2021 09:55:00
<input type="checkbox"/>		📅	Studentteam1 Leader1	User10	BEM	0, 0	Student Team Leader	CSDE Student Team Leader	test10@gmail.com	
<input type="checkbox"/>		📅	Studentteam2 Leader2	User11	BEM	0, 0	Student Team Leader	CSDE Student Team Leader	test11@gmail.com	
<input type="checkbox"/>		📅	Studentteam3 Leader3	User12	BEM	0, 0	Student Team Leader	CSDE Student Team Leader	test12@gmail.com	
<input type="checkbox"/>	●	📅	CM Nine	CMNine	BEM	6, 7		CSDE Student Team Leader	CaseManagerNine@testemail.com	01/10/2022 11:21:00
<input type="checkbox"/>	●	📅	CM One	CM1	BEM	14, 10		CSDE Student Team Leader	CaseManagerOne@TestEmail.com	06/08/2022 14:35:00
<input type="checkbox"/>	●	📅	CM Seven	CM7	BEM	9, 5		CSDE Student Team Leader	CaseManagerSeven@testemail.com	05/10/2022 11:57:00
<input type="checkbox"/>	●	📅	CM Seventeen	CM17	BEM	3, 23	Case Manager	CSDE Student Team Leader	CM17Test@gmail.com	06/02/2022 19:52:00
<input type="checkbox"/>	●	📅	CM Six	CM6	BEM, FHS	19, 6		CSDE Student Team Leader	CaseManagerSix@TestEmail.com	05/26/2022 14:14:00
<input type="checkbox"/>	●	📅	CM Sixteen	CM16	BEM	3, 22	Case Manager	CSDE Student Team Leader	CM16Test@gmail.com	06/02/2022 17:57:00
<input type="checkbox"/>	●	📅	CM Three	CM3	BEM	21, 1		CSDE Student Team Leader	CaseManagerThree@TestEmail.com	06/10/2022 15:52:00
<input type="checkbox"/>	●	📅	CM Two	CM2	BEM, FHS	12, 0		CSDE Student Team Leader	CaseManagerTwo@TestEmail.com	01/13/2022 04:48:00

(15 Users)

INACTIVATE SELECTED USERS

ADD NEW USER

Adding Users

Name:	First <input type="text"/>	Middle <input type="text"/>	Last <input type="text"/>	Suffix <input type="text"/>	*
User Code:	<input type="text"/>				*
Password:	<input type="password"/>				(See How to choose a good password)
Password (again):	<input type="password"/>				
Title:	<input type="text"/>				
Address:	<input type="text"/>				
City, State, Zip Code:	<input type="text"/>				
	<input type="text"/>				
Home Phone:	<input type="text"/>				
Work Phone:	<input type="text"/>				
E-Mail Address:	<input type="text"/>				*

Disability Certifications

Service Certifications

ADD USER TO DATABASE

ADD USER TO DATABASE, THEN EDIT USER DETAILS

ADD USER TO DATABASE, THEN ADD ANOTHER

Inactive Users

The screenshot displays the CTSEDS Admin interface. The top navigation bar includes 'STUDENTS', 'TOOLS', 'MY ACCOUNT', 'ADMIN', and 'REPORTING'. The 'ADMIN' menu is highlighted with a red box. Below the navigation bar, the breadcrumb trail reads 'CT Training District / ADMIN / INACTIVE USERS'. The main content area features a search form with the following fields:

- User Last Name:
- User Code:
- Sort List By:

There are checkboxes for 'Exact Match' next to the 'User Last Name' and 'User Code' fields. A green button labeled 'VIEW INACTIVE USERS *' is positioned below the search form.

Reactivating User Screens

The screenshot shows the CTSEDS Admin interface. The top navigation bar includes 'STUDENTS', 'TOOLS', 'MY ACCOUNT', 'ADMIN', and 'REPORTING'. The 'ADMIN' menu is expanded to show 'DISTRICT INFO', 'DISTRICT CALENDAR', 'SCHOOLS', 'USERS', 'INACTIVE USERS', 'INACTIVE STUDENTS', 'IMPORT HISTORY', and 'IMPORT SUMMARY DATA'. The 'INACTIVE USERS' page displays a table with the following data:

User Code	Name	Title	Reason for Exiting	Date Hired	Date Terminated
Jennifer Noffsinger	Adam Administrator				04/30/2022
mzenmac	Mark Zenmac				05/04/2022

This screenshot shows the detailed view for the user 'Adam Administrator'. The 'Date Terminated' field is set to '04/30/2022'. Below this field are two buttons: 'UPDATE THE DATABASE' and 'RE-ACTIVATE THIS USER IN THE DATABASE'. The 'RE-ACTIVATE THIS USER IN THE DATABASE' button is highlighted with a red box.

User Caseloads

Caseload Wizards

The screenshot displays the CTSEDS web application interface. At the top, a dark blue navigation bar contains the CTSEDS logo on the left and several menu items: STUDENTS, TOOLS, MY ACCOUNT, ADMIN, and REPORTING. The TOOLS menu is expanded, showing sub-items: WIZARDS, PROGRESS TRACK, STUDENT TRANSFER, MERGE STUDENTS, ASSIGN TEACHERS, and ASSIGN SCHOOLS. The WIZARDS sub-item is highlighted with a red box. Below the navigation bar, a breadcrumb trail shows 'TOOLS / WIZARDS'. The main content area features a 'Select a Wizard' dropdown menu. This menu is open, displaying a list of options: Progress Report, Caseload Setup Wizard, Caseload Administration Wizard, and Ad Hoc Report Wizard. The 'Caseload Setup Wizard' and 'Caseload Administration Wizard' options are highlighted with a red box. In the top right corner of the main content area, there is a 'View Calendar' link with a calendar icon and a share icon.

Caseload Admin Wizard – Search for User

CTSEDS STUDENTS RECENT STUDENTS TOOLS MY ACCOUNT ADMIN REPORTING Timothy Thompson

DISTRICT INFO DISTRICT CALENDAR SCHOOLS **USERS** INACTIVE USERS INACTIVE STUDENTS IMPORT HISTORY IMPORT SUMMARY DATA

PCG Training
ADMIN / USERS

School: All Schools *

CSDE System Administrator Administrator (no R/S)

State General User Aggregate Administrator/Certifier

Aggregate Provider Special Ed Teacher

Aggregate Student Team Leader Student Team Leader

OSEP Aggregate Data Manager Provider

OSEP Aggregate District Administrator School Personnel

District IT Administrator State Compliance Monitor

Administrator/Certifier

User Type(s): *
(check none to match all)

User Last Name: Exact Match

User First Name: Exact Match

Title: Exact Match

User ID: Exact Match

Sort List By: User's Last Name *

Caseload Admin Wizard – Viewing Caseload

The screenshot displays the CT-SEDS Caseload Admin Wizard interface. At the top, there is a navigation bar with the CTSEDS logo and menu items: STUDENTS, TOOLS, MY ACCOUNT, ADMIN, and REPORTING. Below this is a secondary navigation bar with WIZARDS, PROGRESS TRACK, STUDENT TRANSFER, MERGE STUDENTS, ASSIGN TEACHERS, and ASSIGN SCHOOLS. The user is logged in as 'D A One'. The current page is titled 'CM Seven'.

The main content area shows a table of students with columns for Student, Current School, Grade, Date Of Birth, and Current Case Manager. The table is filtered to show 8 students. A red box highlights the 'ADD MORE STUDENTS TO CASELOAD' button above the table and the table itself. Below the table, there are several green buttons: 'UPDATE THE DATABASE', 'REMOVE ALL STUDENTS FROM CASELOAD', 'TRANSFER / COPY CASELOAD TO ANOTHER USER', and 'SELECT A USER'.

Case Manager	Team Member	Student	Current School	Grade	Date Of Birth	Current Case Manager
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jay Alloy	BEM	9	04/05/2008	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Noelia Clegg	BEM	KF	09/30/2015	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lola FOR CT Day	BEM	6	09/30/2010	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Nike FOR CT James	BEM	11	09/30/2005	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Timmy Monteiro	BEM	2	12/23/2014	CM Seven
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Willow Quick	BEM	4	09/20/2007	DA One
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sean Reed	BEM	KF	09/30/2015	CM Nine
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phil Weaver	BEM	KF	09/30/2015	CM Seven

Caseload Admin Wizard – Adding Students to Caseload

CTSEDS

STUDENTS ▾ TOOLS ▾ MY ACCOUNT ▾ ADMIN ▾ REPORTING

* D A One [Email] [Share]

WIZARDS PROGRESS TRACK STUDENT TRANSFER MERGE STUDENTS ASSIGN TEACHERS ASSIGN SCHOOLS

CT Training District TOOLS / WIZARDS CM Seven

To add a Student to your caseload, select EITHER the Case Manager OR Team Member check box. You should never select both.

Case Manager		Team Member		Student	Current School	Grade	DOB	Case Manager	Section 504 Case Manager
CHECK ALL	CHECK NONE	CHECK ALL	CHECK NONE						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Randy Adams	BEM	KF	09/30/2011	CM Three	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Noelia Clegg	BEM	KF	09/30/2011	CM Seven	CM Seven
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tina FOR CT Edwards	BEM	11	09/30/2000	DA Three	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Brandon Gladly	BEM	7	05/04/2000	CM Five	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Roy FOR CT Gonzales	BEM	3	08/30/2011	Provider Three	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tyrone FOR CT Hill	BEM	KF	09/30/2011	DA Two	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marlyn House	BEM	KF	09/30/2011	CM Six	CM Two
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Louis Hunt	BEM	KF	09/30/2011	CM Three	CM Five
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Melissa Jackson	BEM	5	09/30/2011	CM Five	CM One
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Matthew James	BEM	1	08/17/2011	CM Five	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vita Juarez	BEM	3	09/30/2011	CM Six	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Joe Mahan	BEM	2	07/06/2011		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sue May	BEM	KF	09/30/2011	CM Three	CM Seven
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Tommy Medina	BEM	KF	09/30/2000	DA Two	CM Three
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Salvatore Quinn	BEM	4	09/30/2011	CM Three	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sol Simona	BEM	2	07/06/2011		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Joe Stevens	BEM	11	07/01/2011		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	John Stevens	BEM	11	07/09/2011		

Caseload Admin Wizard – Transfer Caseload

The screenshot shows the CT-SEDS Caseload Admin Wizard interface. At the top, there is a navigation bar with the CT-SEDS logo and menu items: STUDENTS, TOOLS, MY ACCOUNT, ADMIN, and REPORTING. Below this is a secondary navigation bar with WIZARDS, PROGRESS TRACK, STUDENT TRANSFER, MERGE STUDENTS, ASSIGN TEACHERS, and ASSIGN SCHOOLS. The user is logged in as 'D A One'. The current page is titled 'CM Seven'.

The main content area features a green button labeled 'ADD MORE STUDENTS TO CASELOAD'. Below this is a table with two tabs: 'Case Manager' and 'Team Member'. The table has columns for 'Student', 'Current School', 'Grade', 'Date Of Birth', and 'Current Case Manager'. There are also 'CHECK ALL' and 'CHECK NONE' buttons for both tabs. The table contains 8 rows of student data.

Below the table, there is a summary '(8 Students)' and a series of green buttons: 'UPDATE THE DATABASE', 'REMOVE ALL STUDENTS FROM CASELOAD', 'TRANSFER / COPY CASELOAD TO ANOTHER USER' (highlighted with a red box), and 'SELECT A USER'.

Case Manager	Team Member	Student	Current School	Grade	Date Of Birth	Current Case Manager
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jay Alloy	BEM	9	04/05/2008	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Noelia Clegg	BEM	KF	09/30/2015	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lola FOR CT Day	BEM	6	09/30/2010	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mike FOR CT James	BEM	11	09/30/2005	CM Seven
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Timmy Monteiro	BEM	2	12/23/2014	CM Seven
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Willow Quick	BEM	4	09/20/2007	DA One
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sean Reed	BEM	KF	09/30/2015	CM Nine
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phil Weaver	BEM	KF	09/30/2015	CM Seven

Caseload Admin Wizard – Transfer Caseload

Case Manager	Team Member	Student	Current School	Grade	DOB	Current Case Manager
Yes		Jay Alloy	BEM	9	04/05/2008	CM Seven
Yes		Noelia Clegg	BEM	KF	09/30/2015	CM Seven
Yes		Lola FOR CT Day	BEM	6	09/30/2010	CM Seven
Yes		Mike FOR CT James	BEM	11	09/30/2005	CM Seven
Yes		Timmy Monteiro	BEM	2	12/23/2014	CM Seven
	Yes	Willow Quick	BEM	4	09/20/2007	DA One
	Yes	Sean Reed	BEM	KF	09/30/2015	CM Nine
Yes		Phil Weaver	BEM	KF	09/30/2015	CM Seven

When Copy is selected, only Students where CM Seven is not the Case Manager will be copied, as a Student may not have more than one Case Manager at one time.

I want to CM Seven's Special Education Caseload to the following user:

Upcoming Preview Sessions

June 8th

Home Page and Orientation

- Dashboard and Widgets
- My Account tools
- Student Search

June 15th

Users and Caseloads

- User Types
- Adding/Inactivating Users
- Caseload Set-Up

June 22nd

Administrative Tasks

- District Calendar Management (Progress Report Periods, ESY)
- Schools Management
- Monitoring Imports

