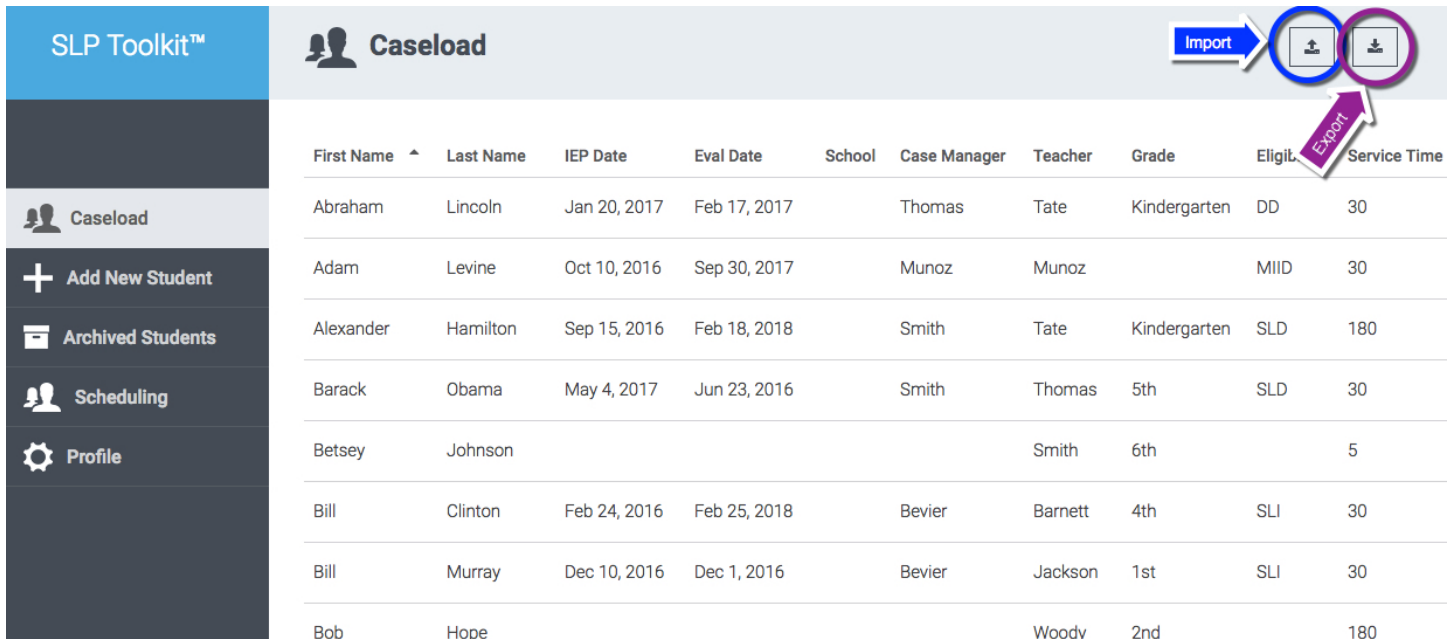


# Caseload Import Feature



First Name	Last Name	IEP Date	Eval Date	School	Case Manager	Teacher	Grade	Eligibility	Service Time
Abraham	Lincoln	Jan 20, 2017	Feb 17, 2017		Thomas	Tate	Kindergarten	DD	30
Adam	Levine	Oct 10, 2016	Sep 30, 2017		Munoz	Munoz		MIID	30
Alexander	Hamilton	Sep 15, 2016	Feb 18, 2018		Smith	Tate	Kindergarten	SLD	180
Barack	Obama	May 4, 2017	Jun 23, 2016		Smith	Thomas	5th	SLD	30
Betsey	Johnson					Smith	6th		5
Bill	Clinton	Feb 24, 2016	Feb 25, 2018		Bevier	Barnett	4th	SLI	30
Bill	Murray	Dec 10, 2016	Dec 1, 2016		Bevier	Jackson	1st	SLI	30
Bob	Hope					Woody	2nd		180

We have added a button to the caseload screen next to the export button to upload a .csv file for importing your caseload. The import feature allows you to import a .csv file with the following set fields:

**First Name, Last Name, DOB, IEP Date, Eval Date, Case Manager, Eligibility, School, Teacher**

If your IEP software system provides an export with more or less than the above fields, you will need to modify the file before importing. In addition, these fields must be listed in the order stated above.

E.g. 1 - If your report lists first name/last name in one field, you will need to separate them by first name in one column and last name in the next column.

E.g. 2 - If your field does not include one of the required fields such as DOB, insert a column to represent this field in between Last Name and IEP Date and leave it blank.

To use the import feature, simply follow these three steps:

1. Select the .csv file to import.
2. Review the records to be imported and determine if any records need to be deselected.
3. You will then confirm the import.

A tutorial video is available [here](#) (We have added the following fields since this video was created: School and Teacher).