

How to Run a Tutor Caseload List in Web App

The screenshot shows a web application interface for generating a report. It is divided into three numbered sections:

- Section 1:** A dropdown menu labeled "Select Report" with "tutor caseload" selected.
- Section 2:** A filter configuration area. It includes a "Pick a field" dropdown with "Advocate.Advocate" selected. A "then a comparison," section has "=" selected. A "then your values..." section has "AMY TAMBURRO" entered. Below this, a text box displays the filter: "Advocate.Advocate = AMY TAMBURRO". To the right, there are "Start Date" (9/5/2024) and "End Date" (4/7/2025) fields, and "Add Filter" and "Remove Filter" buttons.
- Section 3:** A "Run Report" button.

Step 1: Choose your report

1. From the Reports tab, click on "Tutor Caseload" (Section 1)

Step 2: Add filters to customize your report

2. Pick the Field "Advocate.Advocate" (Section 2)
3. Click on Comparison " = " (Section 2)
4. In the Value box type Advocate Name (Section 2) *NOTE: Please make sure you use CAPS and that the name is the exact name that we use in the Web App system*
5. Click "Add Filter" (Section 2). If you do it correctly, you will see the data filed on the box right above the "Run Report" button
6. Pick the Field "School History.WITHDRAWDATE"
7. Comparison is null (Section 2). This will take students off caseload list that have moved or term out
8. Add Filter (Section 2)

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1 Select Report Type tutor caseload

2 Pick a field
Student ID
Advocate.Advocate
School History.DEPDATE
Advocate.Advocate
School History.ENROLLDATE
School History.WITHDRAWDATE

then a comparison,
 =
 <= (less than)
 >= (greater than)
 <> (not equal)
 is null
 is not null
 between

then your values...
AMY TAMBURRO
Add Filter
Remove Filter

Advocate.Advocate = AMY TAMBURRO
School History.WITHDRAWDATE is null

Start Date 9/5/2024 End Date 4/7/2025

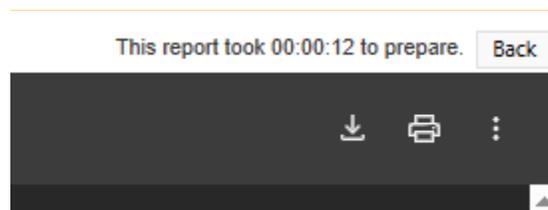
3 Run Report

Step 3: Run your report

9. Make sure the Start Date and End Date are for the current performance period (09/05/24-08/31/25)
10. Click on "Run Report" (Section 3)

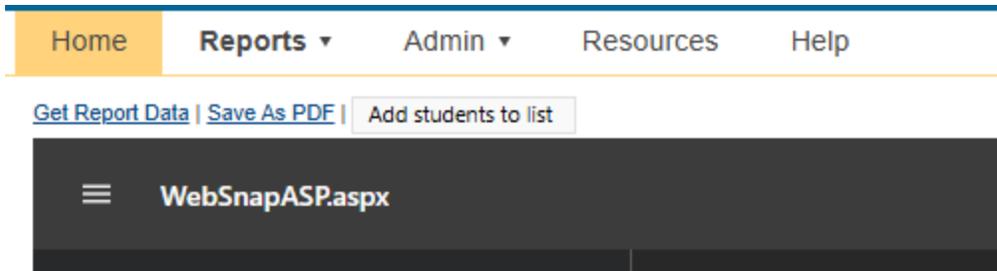
Step 4: Review Your Report

11. Once you run the report, you can choose how you want to see the data
12. On the upper right side, you can choose to download the report (down arrow) or Print the Report (printer)



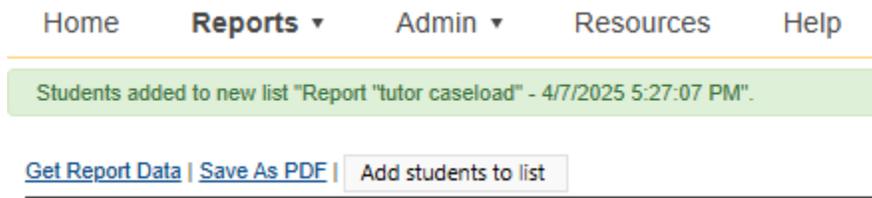
13. On the upper left side, you can choose to get the report as Excel, PDF, or to "Add students to list"

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Step 5: Add students to list

14. "Add students to list" will move all the students included in the list you created into the "List" tab on the home page.
 - a. **Why would you like to do this?** Once the students are on the List, you can add services to multiple students and it will be easier to find your students the following time you are in the web app
15. After you click "Add Students to list", you would see a banner at the top of the page to let you know that you successfully added all the students in the report to a "List"



16. If you want to access that list, go back to the Home page, click on "List" and find the name that the system gave to your list. Once you are there you can change the name of the list by clicking on the Edit button

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List Name
> Current list K-12 students
> Report "9-12 students" - 11/4/2024 3:41:25 PM
> Report "ALPHA All Enrollments" - 11/8/2024 3:01:56 PM
> Report "Cumulative Service Hours" - 1/8/2024 10:28:12 AM
> Report "Enrollment All" - 9/8/2024 8:48:13 AM
> Report "Enrollment Most Recent" - 5/2/2024 12:33:12 PM
> Report "tutor caseload" - 4/7/2025 5:27:07 PM



Edit	Delete
	