

Caseload management Job Aid

[Updated: Sept 2024. Note: we are expecting changes to occur with CHER and SAS in the near future. This guide may fall out of date soon.]

Disclaimer: Information in this guide represents a best effort at accuracy and efficiency of a few members of our team. However, the guide is not comprehensive. If you discover errors, necessary updates, or unclear language, please inform the ALT.

Caseload Terminology Used Here:

- Department Caseload: Called “BL [dept name] (Office)” in AdRx. A caseload of students assigned to the department or program that hosts the student’s major. May include several different types of majors in the specific dept/program. May include students who are also assigned to an individual advisor in the cluster and may include students not assigned to an individual advisor (aka unassigned students).
- Cluster Caseload: Called “Assigned Advisees – All” in AdRx. A caseload of all students assigned to all dept caseloads to which the advisor is assigned. This may include all departments in the advisor’s cluster. Or, it may be a smaller set of departments and majors in the cluster, if the advisor is not assigned to every department in their cluster. Ask your direct supervisor if you are not sure which caseloads you are assigned to as part of your cluster.
- Individual Caseload: Called “Assigned Advisees – Individually assigned” in AdRx. A caseload of students assigned to you as an individual, named advisor. These students will also be assigned to a department caseload.
 - Majors in Individual Caseload: called “BL UGRD COLL1 [Major name]” in AdRx. A breakdown of each type of major included in the advisor’s individual caseload.
- Unassigned students: Students who are assigned to a department caseload in your cluster, who are not assigned to an individual, named advisor in your cluster.

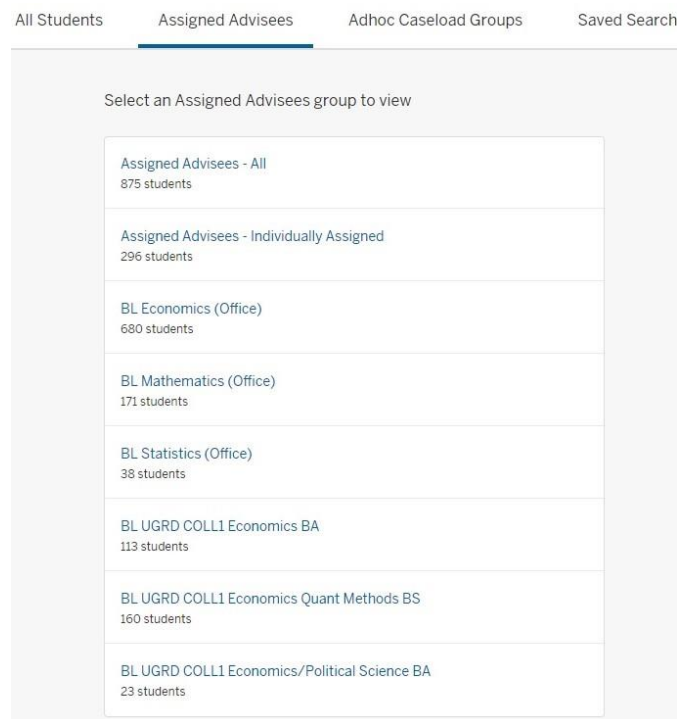
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Identifying your caseloads in AdRx

All College advisors will have several caseload options under the “caseload” menu in AdRx. This will include the Cluster caseload (“Assigned Advisees – All”), an individual caseload (“Assigned Advisees –

Individually assigned”) and one or more department caseloads (“BL [dept name] (Office)”). See Caseload Terminology, above, for definitions of those caseloads. Advisors will also see smaller subsets of their individual caseloads, the majors in their individual caseload. In these caseloads, each major individually assigned to a named advisor is also broken down into separate lists by major, called “BL UGRD COLL1 [Major name]”.



Using Adrx Filters to identify individual caseload for senior checks

Each College advisor is responsible for submitting a senior check in CHER for all students in their individual caseload who have applied for graduation. But, your individual caseload may include multiple majors and departments. You may identify students on your individual caseload in AdRx who have applied for graduation and then compare that list to the lists in CHER. Here is a suggested process for doing that.

Step 1: go to the Caseload Menu in AdRx. Click on your individual caseload, “Assigned Advisees – Individually Assigned”.

Step 2: Check the filters menu on the left for a filter titled “Graduation Review Status” and open that option using the blue sideways arrow.

Filters

Campus

Any Campus ▼

Career

Any Career ▼

Action Items >

Admit Term >

Alerts >

Area of Study >

Class Standing >

Course Grades >

Course Registration >

Enrollment >

GPA >

Graduation Review Status >

Step 3: Select the semester you expect students to graduate. Click “program in review”. Scroll up a bit and click “Apply to Results”.

Select Graduation Review Status

Selected Filters [collapse all](#)

Graduation Review Status ×

(Fall 2024)

Program in Review ×

[Clear All](#) [Apply To Results](#)

Graduation Review Status

Semester

Fall 2024 ▼

Program in Review

Program Not in Review

Step 4: you now have a smaller list of students on your individual caseload who have applied to graduate in the next term and may need a senior check performed.

CK Individual Caseload (filtered to 2/296 students) Add Students

Applied Filters: Graduation Review Status... [expand all](#)

0 Selected Add Contact Note Add to a Caseload Group Push to Camp...

[↓ Export for Advisor Assignment](#)

Tip, create an AdHoc group: You may want to click the box next to “0 Selected” in order to select everyone in this filtered list. Then, click “Add to a Caseload Group”. Create a new Ad Hoc group by using the “add students to new ad hoc group option” Name this something that indicates you need to perform senior checks for these students. Then click “create group...”. You can easily save the list for continuing your senior checks another day.

Add Students to Adhoc Caseload Group ×

Choose or Create a Caseload Group

Add students to a new adhoc group

Individual Caseload Needs Senior Check Fall 2024

Add students to an existing group

Choose adhoc group... ▼

2 Students Selected
Duplicates will be ignored.

Reminder AdHoc groups are static: AdHoc groups in AdRx are static, not dynamic. They only include the students you added. Therefore, you may need to re-run this search periodically and add new students to the AdHoc group who have recently applied for graduation or changed their graduation application status.

Identifying unassigned students in the department caseload

You may have students assigned to your Department Caseloads who are not assigned to any individual advisor in your cluster. You should identify who these students are.

Possible reasons this may happen:

- You have an open advisor line in your cluster and students are assigned to an invisible “temp advisor” in the cluster.
- A student has more than one major in the College and is assigned to an individual advisor in another department outside your cluster.
- Student has not enrolled in recent terms or is dismissed.

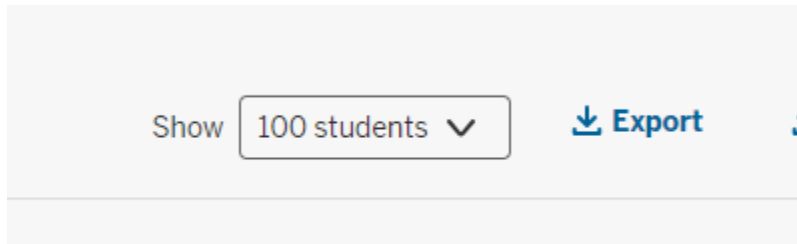
Important Uses for this Unassigned student AdHoc group:

- Senior checks for students unassigned to an advisor in your cluster
- Providing restricted appointment slots for unassigned students in your cluster
- Advising Outreach for unassigned students in your cluster

How to identify Unassigned Students in a Department Caseload:

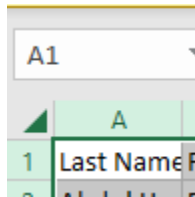
Step 1: Go to the caseload menu in AdRx. Click the name of a department caseload, "BL [dept name] (Office)" caseload.

Step 2: Click the blue down arrow for the "export" option near the middle right.

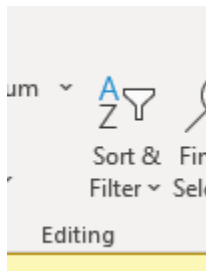


Step 3: Open your downloaded Excel file using either the downloads link near the top right of your browser menu (if using Chrome) or go to your downloads file and open in Excel.

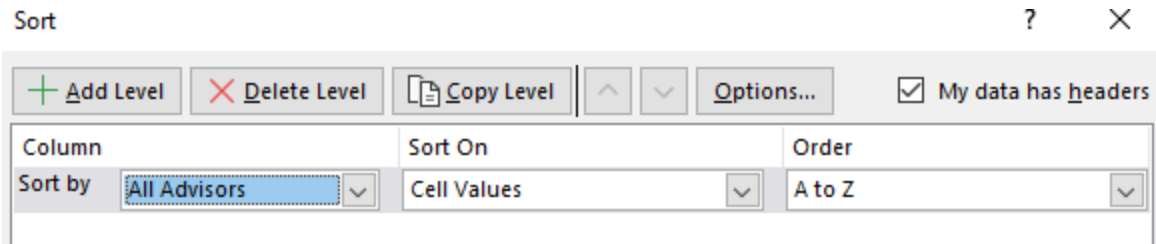
Step 4: Select all entries using the triangle button in the top left that appears under the A1 box.



Step 5: Click "sort and filter" menu along the top, towards the right. Use "Custom sort."

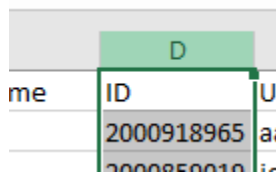


Step 6: Click "my data has headers box". Then, Sort by all advisors. Do not use the offices column.



Step 7: Skim through the entries in column H. Delete the row for every entry that lists the names of the advisors in your cluster. You may need to search for their names listed second or third in the column entries if the student has more than one individual assignment. The remainder will be students unassigned to an individual advisor in this department within your cluster.

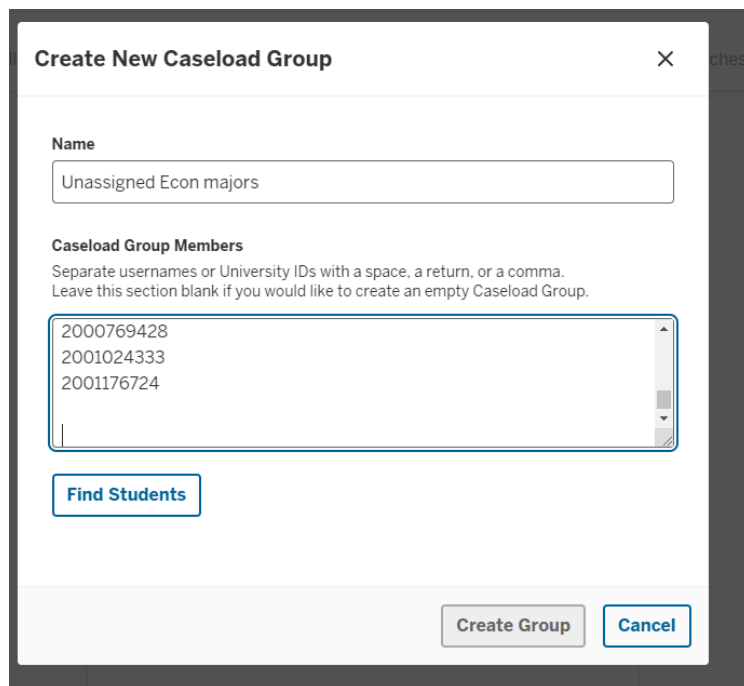
Step 8: Highlight all entries in the ID column, column D



Step 9: Hit Ctrl C to copy the column data.

Step 10: Navigate back to AdRx. Click Caseload from the menu along the top. Click “Adhoc caseload Groups.” Click “Create New Caseload Group.”

Step 11: Name your new Caseload Group something like “Unassigned Students in [Dept name]”. Put your cursor in the Caseload Group Members box. Hit Ctrl V to paste ID numbers. Click “Find Students”. Then, “Create Group”.

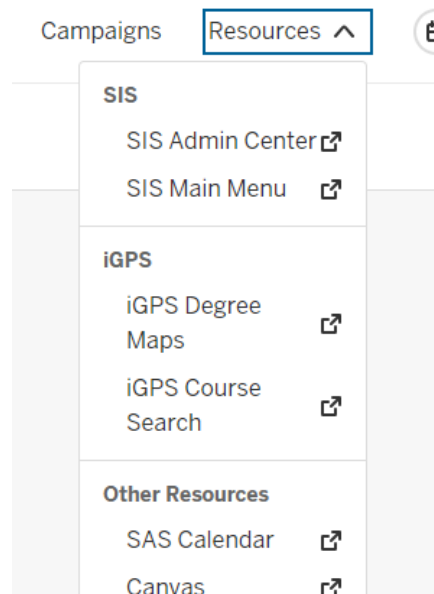


Creating Restrictions in SAS

You may wish to create restrictions in your SAS calendar to control who can see open appointment slots. Please talk with your direct supervisor about the best way to determine the ratio of appointments reserved for different types of students. You should also talk with your cluster to ensure complimentary (but not necessarily identical) practices across the group.

How to create a restriction in SAS:

Step 1: Navigate to your SAS calendar by using the Resources Menu in AdRx.



Step 2: On your calendar page, on the left hand menu, scroll down to the bottom left and click on "Manage Restrictions".

Restrictions

- ECON Minors
- Econ/Math majors
- Math BA
- Math Transfer Stu
- Math/Econ BA
- Pre-Math Contacts
- Rescheduled slots

[Manage Restrictions](#)

Step 3: Click "Create New Slot Restriction". This page allows you to create restrictions based on a lot of possible criteria.

[Create New Slot Restriction](#)

Saved Restrictions

ECON Minors	>
Econ/Math majors	>
Math BA	>
Math Transfer Stu	>
Math/Econ BA	>
My Individual Caseload	>
Pre-Math Contacts	>
Rescheduled slots	>

New Slot Restriction

Name

include assigned advisees

Caseload Group

Campaigns

Campus

Career

School

Area of Study

Possible criteria you can use:

- Include assigned advisees checkbox: Creates a restriction based on all students in your Cluster Caseload, or in other words your “Assigned Advisees – All” caseload in AdRx. **This checkbox is not for your individual caseload!** See next topic in job aid for individual caseload restriction.
- Caseload group: allows you to create a restriction based on a Department Caseload you have in AdRx or an Adhoc caseload you have created in Adrx. Individual caseload is not an option. See next topic in the job aid.
- Campaigns is an option if you use it.
- Other criteria are available for various student attributes. Use care when selecting criteria and do not overselect, as each added criteria further limits the students who can see slots bound by this restriction.

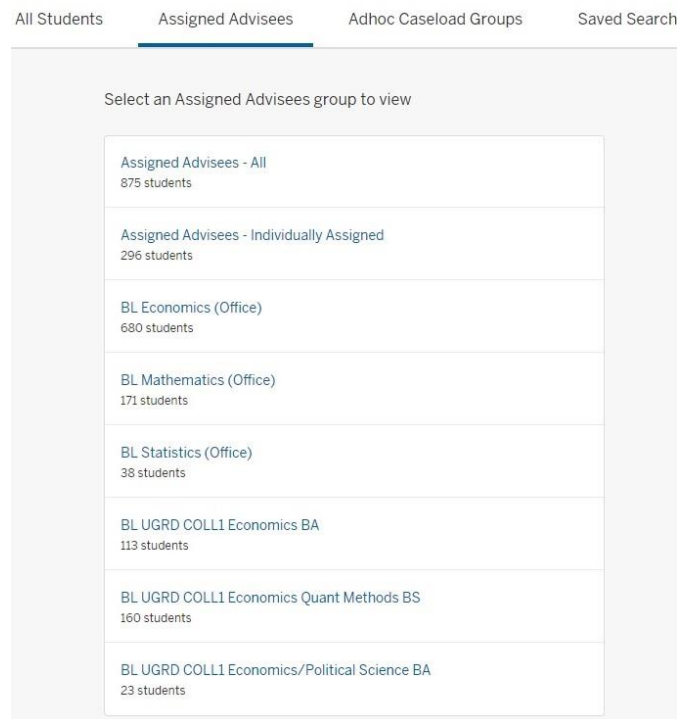
Important note: Current options in Manage Restrictions in SAS do not allow you to create a restriction based on your individual caseload. See next topic for instructions.

Tip for Restrictions: When you create a new restriction, every criteria you add to the restriction is a type of “and” logic. Any time you use that restriction the student must meet every criteria selected in order to see the appointment slot. When you apply more than one restriction to an individual appointment slot, you are using a type of “or” logic. All students who meet any of the restrictions applied to the appointment slot may see that appointment time.

Using Adrx Adhoc caseload to create a SAS restriction for your individual caseload

In order to restrict a portion of your appointments for students on your individual caseload, you must first create an Adhoc group in AdRx. Then, create a restriction based on the Adhoc group.

Step 1: click on Caseload in AdRx, then click on Assigned Advisees – Individually Assigned.



The screenshot shows the AdRx interface with the 'Assigned Advisees' tab selected. The page title is 'Select an Assigned Advisees group to view'. Below this, there is a list of groups with their student counts:

Group Name	Number of Students
Assigned Advisees - All	875 students
Assigned Advisees - Individually Assigned	296 students
BL Economics (Office)	680 students
BL Mathematics (Office)	171 students
BL Statistics (Office)	38 students
BL UGRD COLL1 Economics BA	113 students
BL UGRD COLL1 Economics Quant Methods BS	160 students
BL UGRD COLL1 Economics/Political Science BA	23 students

Step 2: Click the link called “Add to Caseload Group.” Use the “add students to a new adhoc group” option.

296 Results

Save Search

Applied Filters: **Advising Offices & Advisors...** expand all

Add Contact Note

Add to a Caseload Group

Push to Camp...

Export for Advisor Assignment

Step 3: Name this group something like "Individual Caseload". Then click "create group...".

Add Students to Adhoc Caseload Group

×

Choose or Create a Caseload Group

Add students to a new adhoc group

Individual Caseload

Add students to an existing group

Choose adhoc group...

296 Students Selected

Duplicates will be ignored.

Step 4: Go to the Resources menu in the top right of AdRx. Open "SAS Calendar". On the left hand menu, scroll down to the bottom left and click on "manage Restrictions".

Restrictions

- ECON Minors
- Econ/Math majors
- Math BA
- Math Transfer Stu
- Math/Econ BA
- Pre-Math Contacts
- Rescheduled slots

[Manage Restrictions](#)

Step 5: click “Create New Slot Restriction”. Name the restriction something like “My individual caseload”. Then select the name of your new individual caseload Adhoc group from the Caseload Group drop down menu. Do not choose any other criteria. Scroll down and click “Create Restriction.”

[Calendar](#) / [Manage Slot Restrictions: Elizabeth Rosa Marie Smith](#)

Create New Slot Restriction

Saved Restrictions

- ECON Minors >
- Econ/Math majors >
- Math BA >
- Math Transfer Stu >

New Slot Restriction

Name

My Individual Caseload

include assigned advisees

Caseload Group

Individual Caseload

Step 6: Click the blue “calendar” link near the top left to return to your calendar. Create new appointment slots and apply the newly created restriction under “restrictions (optional)”. Or, you may click on a pre-existing appointment slot and edit it to add the restriction.

Profile

Schedule Manager/College of Art: ▼

Restrictions (optional)

- ECON Minors
- Econ/Math majors
- Math BA
- Math Transfer Stu
- Math/Econ BA
- My Individual Caseload
- Pre-Math Contacts
- Rescheduled slots

Create Slot **Schedule**

Tip for Restrictions: When you create a new restriction, every criteria you add is a type of “and” logic. Any time you use that restriction the student must meet every criteria selected in order to see the appointment slot. When you apply more than one restriction to an individual appointment slot, you are

using a type of “or” logic. All students who meet any of the restrictions applied to the appointment slot may see that appointment time.

Student View in SOAR for Advisor assignment

In order to see a student view of SOAR, you may go to the student’s record in AdRx, then click the “SOAR (as student)” link on the left hand menu near the bottom, under Quick Links.

Quick Links

[^ OnBase](#)

[View Documents](#)

[Upload Document](#)

[AAR](#)

[What-if AAR](#)

[Unofficial Transcripts](#)

[Current Schedule](#)

[Course History](#)

[Planner](#)

[Term History](#)

[Shopping Cart](#)

[Permissions](#)

[iGPS Plan](#)

[Schedule Builder](#)

[SIS Student Center](#)

[SIS Admin Center](#)

[SAS Calendar \(as student\)](#)

[SOAR \(as student\)](#)

[Learning IU](#)

In SOAR, a student with multiple majors in the College will be assigned to an individual advisor in the college for the first major listed, the advising office for each major listed, and another other applicable advising offices including Hutton, Scholarship offices or Athletics. The student below has a double major in International Studies, Economics and two scholarships. But, she is only assigned to one College advisor.

Your Advisors (5)

Academic Advisor

Dale Spicer

[812/855-4719](tel:812/855-4719)

daespice@iu.edu

Advising Office

21st Century Sch. Bloomington

[812/856-1910](tel:812/856-1910)

iub21cs@iu.edu

Advising Office

Economics

[812/855-1021](tel:812/855-1021)

econadvi@iu.edu

Advising Office

Groups: Michael Grubb

[812/855-0625](tel:812/855-0625)

migrubb@iu.edu

Advising Office

International Studies

[812/856-1816](tel:812/856-1816)

hlsadv@iu.edu

Student View in SAS for appointment scheduling

In order to see a student view of SAS, you may go to the student's record in AdRx, then click the "SAS Calendar (as student)" link on the left hand menu near the bottom, under Quick Links.

Quick Links

[^ OnBase](#)

[View Documents](#)

[Upload Document](#)

[AAR](#)

[What-if AAR](#)

[Unofficial Transcripts](#)

[Current Schedule](#)

[Course History](#)

[Planner](#)

[Term History](#)

[Shopping Cart](#)

[Permissions](#)

[iGPS Plan](#)

[Schedule Builder](#)

[SIS Student Center](#)

[SIS Admin Center](#)

[SAS Calendar \(as student\)](#)

[SOAR \(as student\)](#)

[Learning IU](#)

In SAS, a student with multiple majors in the College will see listed first the name of the individual advisor in the college for the first major listed. But, the student will also see links to find advisors for each department advising office for each major listed, and any other applicable advising offices including Hutton, Scholarship offices or Athletics. The student below has a double major in International Studies, Economics and two scholarships. She can click on her assigned advisor for her first major in the College, or the department list for her other majors in the College, or the name of her scholarship office. She can also use a link to see all of those advisors listed on one page, or search for another advisor using tags.

Schedule with

IU Bloomington
Dale Spicer College of Arts and Sciences
21st Century Sch. Bloomington iub21cs@iu.edu (812) 856-1910
Economics
Groups: Michael Grubb
International Studies
All assigned to you

[Schedule with someone else](#)

If this student above wants to meet with an advisor for her Economics major, she must click on the Economics link and then search the calendars of all advisors listed since she is not individually assigned to an Econ advisor.

Economics

Search by name, school, department, or focus area

Examples: Athletics, Business, College of Arts and Sciences, Honors, Italian, Independent Studies, Overseas Studies, Psychology, University College

Showing 4 results

Select the person with whom you would like to meet. If you want to see the availability of multiple people, you can select up to 20, then find all their open appointments at once. Use the select all checkbox to select all results on the current page.

0 selected

Find available appointments

- Results**
- [Michael Beck](#)
College of Arts and Sciences
Economics (ECON)
- [Ary Bird](#)
College of Arts and Sciences
ECON · mathematics · statistics · economics · MATH · STATS
- [Chris Klein](#)
College of Arts and Sciences
Economics · ECON · MATH · Mathematics · Statistics · STAT · Stats
- [Zachary Vaughn](#)
College of Arts and Sciences
Physics · Animal Behavior · Astronomy · Statistics · Economics · Mathematics

Identifying students assigned to a Department Caseload you are not assigned to, or assigned to a different advisor.

If you would like to view the students on a department caseload you are not assigned to, you can use the “search” function in AdRx.

Step 1: Click “search” along the top menu in AdRx. Then, click “Advanced Search”. Within the “All students” search page, look at the filters along the left. Click “Advising Offices and Advisors.”

Filters

Campus

Career

At least one filter needs to be selected besides Campus and Career to run the search.

[Action Items](#) 

[Admit Term](#) 

[Advising Offices & Advisors](#) 

Then, Expand “Advising Offices” to see all advising offices available, including all departmental caseloads in the College. You may select one or more, then scroll up and hit “apply to results.” You may use the “add to a Caseload Group” option to add these results to an Adhoc caseload to further manipulate the results.

Instead of using advising offices, you could choose to expand the “advisors” part of the “Advising Offices & Advisors” filter to identify a caseload assigned to an individual advisor.