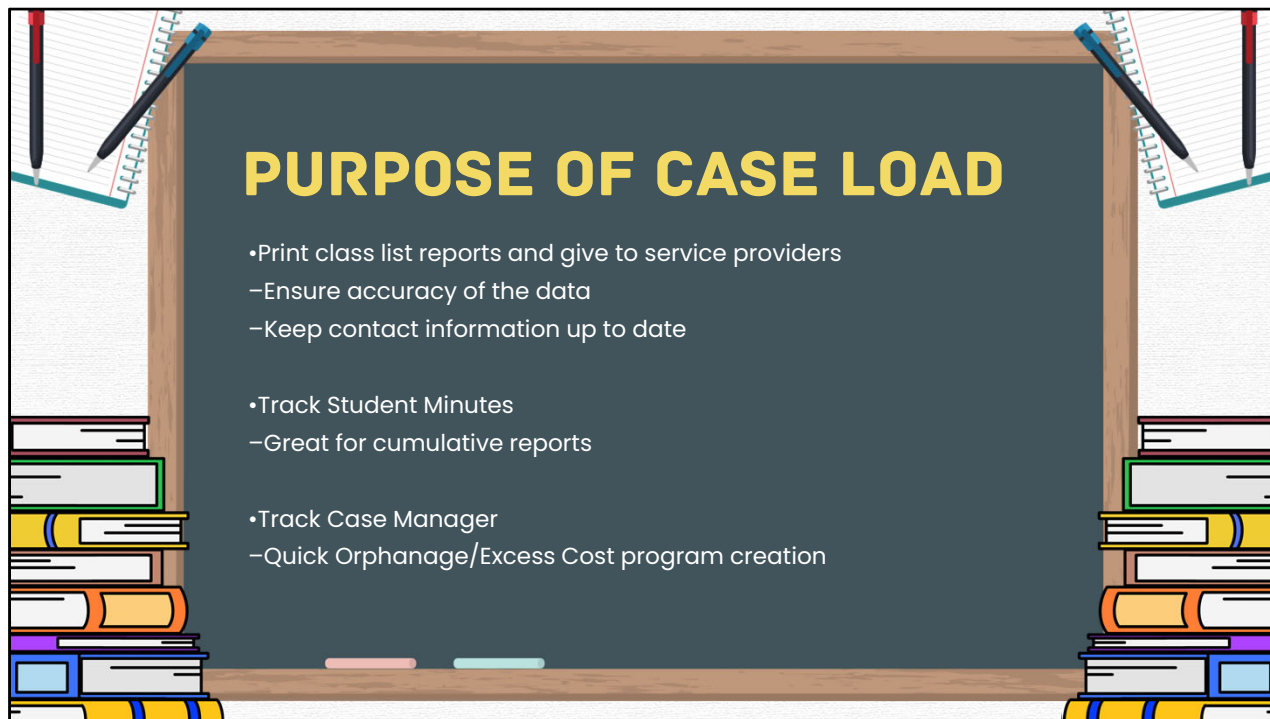




TOPICS

- Purpose of Case Load
- Case Load Definitions
- Creating a Case Load
- Adding Students to a Case Load
- Edit/Delete Case Load
- Case Load Export/Import
- Case Load Reports



PURPOSE OF CASE LOAD

- Print class list reports and give to service providers
 - Ensure accuracy of the data
 - Keep contact information up to date
- Track Student Minutes
 - Great for cumulative reports
- Track Case Manager
 - Quick Orphanage/Excess Cost program creation



CASE LOAD DEFINITIONS

Case Load Definition Examples:

- By district/school program: Resource, Early Childhood, Life Skills
- By teacher: list of students served (works best for program creation for claims)
- By related service: Occupational Therapy, Physical Therapy, Speech, etc.

CASE LOAD DEFINITION SETUP

Case Load Definition is the starting point for setting up classes/teachers:

Approvals and Claims -> Student -> Case Load Definition

Next, Click the Add icon

Approvals and Claims IEP

Student Approvals

Personnel Claims

Program Definition

Upload Files

Caseload Definition

Student SIS Id:

Last Name:

First Name:

School Year: 2018

School Year: 2023-2024

District:

School:

Class Name:

Teacher Name:

Search Clear Search Export

Case Load Definition Search Results (Add)

CASE LOAD DEFINITION

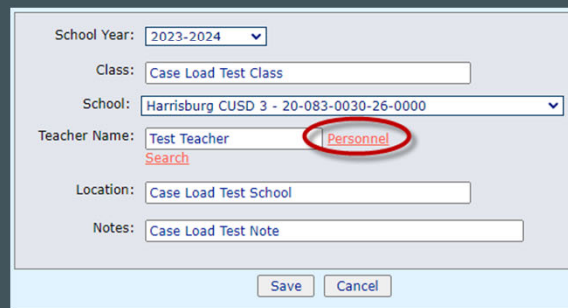
- The example below demonstrates how to add a new class in the case load definition
- Not all data is required but can be beneficial when running class list reports

The screenshot shows a web-based form titled "CASE LOAD DEFINITION". The form contains the following fields and controls:

- School Year:** A dropdown menu with "2023-2024" selected.
- Class:** A text input field containing "Case Load Test Class".
- School:** A dropdown menu with "Harrisburg CUSD 3 - 20-083-0030-26-0000" selected.
- Teacher Name:** A text input field containing "Test Teacher", followed by a "Personnel" link and a "Search" link.
- Location:** A text input field containing "Case Load Test School".
- Notes:** A text input field containing "Case Load Test Note".
- Buttons:** "Save" and "Cancel" buttons at the bottom. The "Save" button is circled in red.

CASE LOAD DEFINITION

- Teacher name can be populated manually or by utilizing the Personnel Search to select teachers that are entered in I-Star in the Personnel Approvals



The screenshot shows a web form titled "CASE LOAD DEFINITION". The form contains the following fields and controls:

- School Year:** A dropdown menu set to "2023-2024".
- Class:** A text input field containing "Case Load Test Class".
- School:** A dropdown menu set to "Harrisburg CUSD 3 - 20-083-0030-26-0000".
- Teacher Name:** A text input field containing "Test Teacher". To the right of this field is a button labeled "Personnel" which is circled in red. Below the input field is a red "Search" link.
- Location:** A text input field containing "Case Load Test School".
- Notes:** A text input field containing "Case Load Test Note".
- Buttons:** At the bottom right of the form are "Save" and "Cancel" buttons.

CASE LOAD DEFINITION

Search for Teacher

Search for School Personnel.

Cancel

Personnel Search

Multiple	OR	Single
District: <input type="text"/>		IEIN: <input type="text"/>
Last Name: <input type="text"/>		
First Name: <input type="text"/>		
Gender: <input type="text"/>		
Include Retired <input type="checkbox"/>		
<u>Search</u>	Clear Search	Cancel

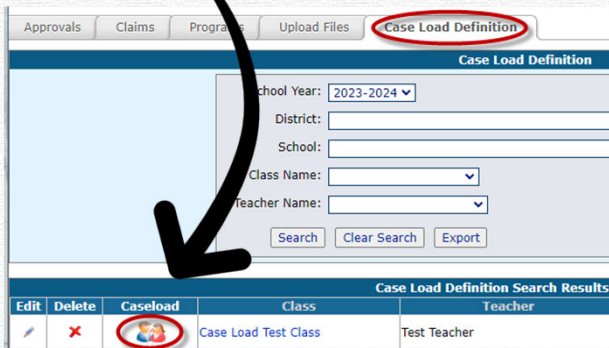
Note: Including a district will search EIS without the entered filters. Leaving the district out will perform a name search on ELIS.

CASE LOAD DEFINITION

Person				
Select	IEIN	Name	Gender	El
✓	9000029	DemoRoxana J Adams	Female	W
✓	9000161	Train11Chelsey L Bailey	Female	Bl
✓	9000028	DemoAngie D Baker	Female	W
✓	9000003	DemoLina A Bell	Female	Un
✓	9000034	DemoMarisa Bell	Female	Hi
✓	9000024	DemoReina Brooks	Female	W
✓	9000019	DemoAsia D Brown	Female	W

ADDING STUDENTS TO A CASE LOAD

Click the icon to add students to your caseload



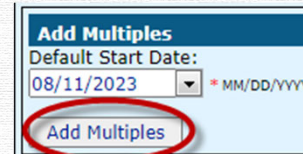
Case Load Definition

School Year: 2023-2024
District:
School:
Class Name:
Teacher Name:

Search Clear Search Export

Edit	Delete	Caseload	Class	Teacher
			Case Load Test Class	Test Teacher

Enter a default start date:



Add Multiples

Default Start Date:
08/11/2023 * MM/DD/YYYY

Add Multiples

ADDING STUDENTS TO A CASE LOAD

Search For Approvals

Student SIS Id: <input type="text"/>	Show only Out of District: <input type="checkbox"/>
Last Name: <input type="text"/>	Resident District: <input type="text"/>
First Name: <input type="text"/>	Resident School: <input type="text"/>
School Year: <input type="text"/>	Serving District: <input type="text"/>
Status: <input type="text"/>	Serving School: <input type="text"/>
Grade: <input type="text"/>	Disability: <input type="text"/>
Term: <input type="text"/>	Fund: <input type="text"/>
Tuition Bill: <input type="checkbox"/>	Program: <input type="text"/>
Related Services: <input type="text"/>	Reimbursement Status: <input type="text"/>
EE Code: <input type="text"/>	Class Teacher: <input type="text"/>
Local District ID: <input type="text"/>	Class Name: <input type="text"/>
DOB: <input type="text"/>	Event: <input type="text"/>

Search for the student approval records to add to the case load

ADDING STUDENTS TO A CASE LOAD

Use Selected		
Select	Multi Select All / None	Student Name
✓	<input checked="" type="checkbox"/>	Adams, DemoSabine Isa
✓	<input checked="" type="checkbox"/>	Adams, DemoSabine Isa
✓	<input checked="" type="checkbox"/>	Butler, DemoLyndon Hubert
✓	<input checked="" type="checkbox"/>	Cooper, DemoKip Maximilian
✓	<input checked="" type="checkbox"/>	Diaz, DemoAnyashley
✓	<input type="checkbox"/>	Flores, DemoCash Grant

- To add multiple students, click the check box next to the student name then click Use Selected
- To add one student at a time, click the check box in the select column

ADDING STUDENTS TO A CASE LOAD

Case Load (Add) (Export) (Refresh Grid)

Add Multiples

Default Start Date: 08/11/2023 MM/DD/YYYY

Add Multiples

Import

File Format: Excel File: Choose File No file chosen
















Skip First Row: ☒ Import File

Edit	Delete	SIS ID	Student Name	Start
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999010	Adams, DemoSabine Isa	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9999990105	Anderson, DemoJavier Brett	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999015	Cox, DemoFranklyn Mohamed	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999002	Rodriguez, DemoOcean Teresa	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999003	Young, DemoWillam Roy	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999007	Walker, DemoKaylen Brady	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999019	Butler, DemoLyndon Hubert	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999008	Cooper, DemoKip Maximilian	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999999004	Diaz, DemoAnyia Ashley	08/11/2023

- To add multiple students, click the check box next to the student name then click 'Use Selected'
- To add one student at a time, click the check box in the select column

EDIT/DELETE CASE LOAD

- To edit an existing Case Load, click the pencil in the edit column
- To delete an existing Case Load, click the red X in the delete column

		Case Load Definition Search Results (0) A		
Edit	Delete	Caseload	Class	Teacher
			Case Load Test Class	Bailey, Train11Chelsey
			ED	Allen, DemoPaloma
			ED	Robinson, Train17Jayla
			ED	Bailey, DemoBranden A
			LD	Brown, DemoAsia

EXPORT/IMPORT CASE LOAD

Approvals and Claims IEP Admin

Student Approvals

Personnel Claims

Student Residential Program Definition

to 1-Star. Please feel free to Upload Files

Case Load Definition

- Click Approvals and Claims -> Student -> Case Load Definition

- Use Case Load Definition Search filters to view desired Case Load to export

- Click the Case Load icon in the results grid

Case Load Definition

School Year: 2023-2024

District:

School:

Class Name:

Teacher Name:

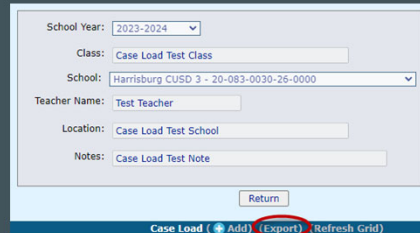
Search Clear Search Export

Case Load Definition Search Results (Add)

Edit	Delete	Case Load	Class	Teacher	School	Notes
			Case Load Test Class	Test Teacher	Harrisburg CUSD 3	Case Load Test Note
			Case Load Test Class	Bailey, Train11Chelsey	Harrisburg CUSD 3	Case Load Test Note
			Case Load Test Class	Bailey, Train11Chelsey	Harrisburg CUSD 3	Case Load Test Note

EXPORT/IMPORT CASE LOAD

- Click Export located under the Case Load Definition

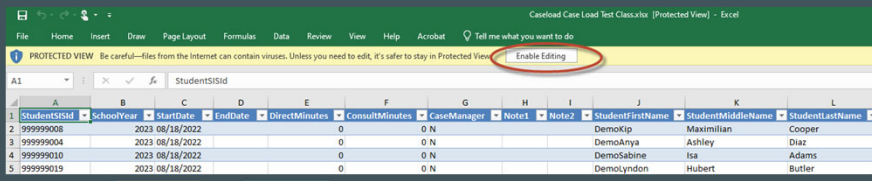


The screenshot shows a web form titled "Case Load Definition". It contains several input fields: "School Year" (dropdown menu showing "2023-2024"), "Class" (text input with "Case Load Test Class"), "School" (dropdown menu showing "Harrisburg CUSD 3 - 20-083-0030-26-0000"), "Teacher Name" (text input with "Test Teacher"), "Location" (text input with "Case Load Test School"), and "Notes" (text input with "Case Load Test Note"). Below these fields is a "Return" button. At the bottom of the form, there is a navigation bar with the text "Case Load" followed by three buttons: "Add", "Export", and "Refresh Grid". The "Export" button is circled in red.

Note: The download location will vary based on the browser used. This example was populated using Google Chrome.

EDIT EXPORTED DATA

- Click Enable Editing
- Edit data
- DO NOT:
 - -Edit Column A or B
 - -Edit the Header Row (Row 1)
- Save spreadsheet (.xlsx) with changes to computer/server location
- Close spreadsheet (.xlsx) and return to I-Star Case Load Definition



CaseLoad Case Load Test Class.xlsx (Protected View) - Excel

File Home Insert Draw Page Layout Formulas Data Review View Help Tell me what you want to do

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

	A	B	C	D	E	F	G	H	I	J	K	L
1	StudentID	SchoolYear	StartDate	EndDate	DirectMinutes	ConsultMinutes	CaseManager	Note1	Note2	StudentFirstName	StudentMiddleName	StudentLastName
2	999999008	2023	08/18/2022		0	0	N			DemoKip	Maximilian	Cooper
3	999999004	2023	08/18/2022		0	0	N			DemoAnyia	Ashley	Diaz
4	999999010	2023	08/18/2022		0	0	N			DemoSabine	Isa	Adams
5	999999019	2023	08/18/2022		0	0	N			DemoLyndon	Hubert	Butler

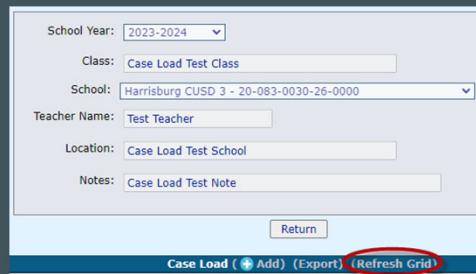
IMPORT EDITED .XLXS

From the Case Load Definition, click Choose File

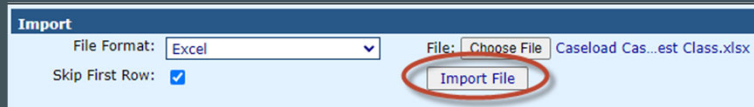
Browse to locate the saved spreadsheet (.xlsx)

Click Import File

Click Refresh Grid



A screenshot of a web form titled "Case Load Definition". The form contains several input fields: "School Year" (dropdown menu showing "2023-2024"), "Class" (text input with "Case Load Test Class"), "School" (dropdown menu showing "Harrisburg CUSD 3 - 20-083-0030-26-0000"), "Teacher Name" (text input with "Test Teacher"), "Location" (text input with "Case Load Test School"), and "Notes" (text input with "Case Load Test Note"). A "Return" button is located at the bottom right of the form. Below the form, there is a navigation bar with "Case Load" followed by three buttons: "Add", "Export", and "Refresh Grid". The "Refresh Grid" button is circled in red.



A screenshot of an "Import" dialog box. It has a "File Format" dropdown menu set to "Excel". Below it, "Skip First Row" is checked. To the right, there is a "File:" label, a "Choose File" button, and a text field containing "Caseload Cas...est Class.xlsx". Below the "Choose File" button, there is an "Import File" button, which is circled in red.



CASE LOAD REPORTS

CASE LOAD STUDENT LISTING

- ALPHABETIC LIST OF STUDENTS WITH BRIEF STUDENT DETAILS. GROUPED BY CLASS AND TEACHER. DESIGNED FOR CONFIRMATION OF THE CLASS LIST AND COLLECTION OF EXITS OR CHANGES TO THE CASELOAD.

CLASS LIST

- ALPHABETIC LIST OF STUDENTS WITH STUDENT DETAILS, APPROVAL RECORD DETAILS AND CASELOAD ENROLLMENT. GROUPED BY CLASS AND TEACHER WITH COUNTS PER CLASS. INCLUDES PARENT NAMES AND ADDRESSES.

CLASS LIST BY CASE MANAGER

- ALPHABETIC LIST OF STUDENTS WITH STUDENT DETAILS, APPROVAL RECORD DETAILS AND CASELOAD ENROLLMENT. GROUPED BY CLASS AND TEACHER. LISTS ONLY STUDENTS WHERE THE TEACHER IS THE CASE MANAGER FOR THE STUDENT, RATHER THAN THE FULL CLASS LIST.



CASE LOAD REPORTS

CLASS LIST WITH APPROVALS AND EVENTS

- ALPHABETIC LIST OF STUDENTS WITH STUDENT DETAILS, APPROVAL RECORD DETAILS AND CASELOAD ENROLLMENT. GROUPED BY CLASS AND TEACHER WITH COUNTS PER CLASS. INCLUDES PARENT NAMES AND ADDRESSES. ADDITIONALLY LISTS DATES FOR ANNUAL REVIEW, CURRENT IEP AND REEVALUATION.

CLASS LIST WITHOUT ADDRESS

- ALPHABETIC LIST OF STUDENTS WITH STUDENT DETAILS, APPROVAL RECORD DETAILS AND CASELOAD ENROLLMENT. GROUPED BY CLASS AND TEACHER WITH COUNTS PER CLASS. OMITTS PARENT NAMES AND ADDRESSES.

ENROLLMENT WITH TOTAL MINUTES PER WEEK

- ALPHABETIC LIST OF STUDENTS WITH DETAILED CASELOAD INFORMATION PER STUDENT INCLUDING MINUTES PER WEEK. GROUPED BY RESIDENT DISTRICT.



CASE LOAD REPORTS

ENROLLMENT WITH TOTAL MINUTES PER WEEK BY CLASS

- ALPHABETIC LIST OF STUDENTS WITH DETAILED CASELOAD INFORMATION PER STUDENT. GROUPED BY CLASS WITH TOTAL MINUTES PER CLASS.

ENROLLMENT WITH TOTAL MINUTES PER WEEK BY SERVING SCHOOL

- ALPHABETIC LIST OF STUDENTS WITH DETAILED CASELOAD INFORMATION PER STUDENT INCLUDING MINUTES PER WEEK. GROUPED BY SERVING SCHOOL.

STUDENTS NOT REPORTED ON CASE LOAD LISTING

- LIST OF ALL STUDENTS THAT HAVE AN APPROVAL RECORD, BUT NO ASSOCIATED CASE LOAD RECORD, EXCLUDES FUND N AND U RECORDS. GROUPED BY RESIDENT DISTRICT AND SORTED BY THE STUDENT NAME. NO CLASS LIST FILTERS.

TOTAL NUMBER ENROLLED BY LOCATION

- LIST OF ALL STUDENTS THAT HAVE AN APPROVAL RECORD, BUT NO ASSOCIATED CASE LOAD RECORD, EXCLUDES FUND N AND U RECORDS. GROUPED BY RESIDENT DISTRICT AND SORTED BY THE STUDENT NAME. NO CLASS LIST FILTERS.

SUPPORT

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(800) 635-5274

support@hbug.k12.il.us

