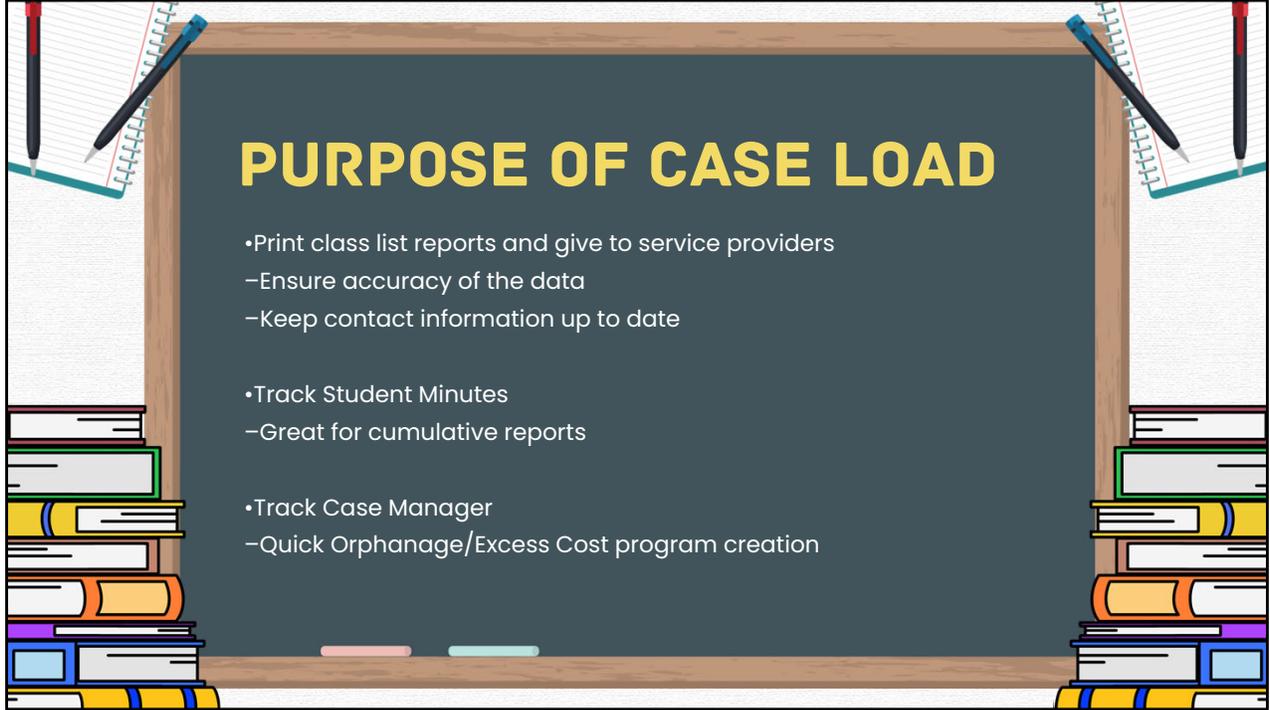




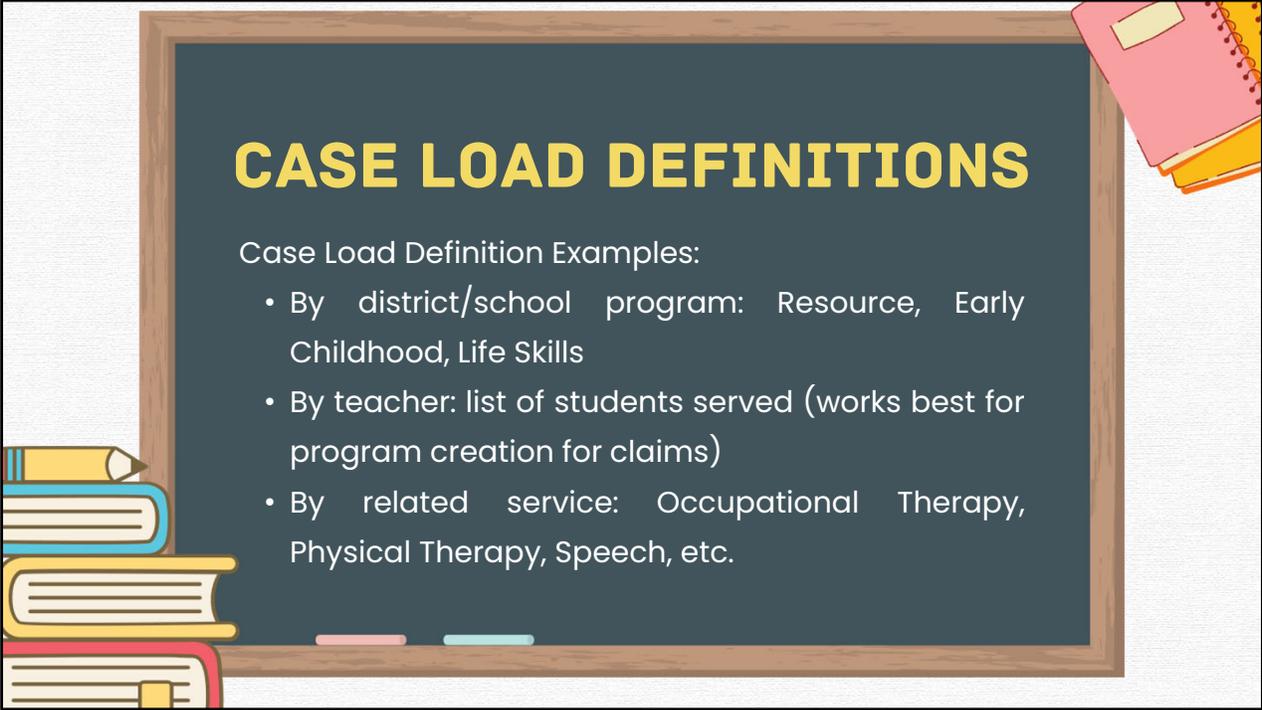
TOPICS

- 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

The screenshot shows a web application interface for 'Case Load Definition Setup'. On the left is a navigation menu with a blue header 'Approvals and Claims' and a sub-menu 'IEP'. Below this are sections for 'Student' (with sub-items 'Approvals' and 'Claims') and 'Personnel' (with sub-items 'Program Definition', 'Upload Files', and 'Caseload Definition'). Below the menu are input fields for 'Student SIS Id', 'Last Name', 'First Name', and 'School Year' (set to 2018). The main content area has a 'School Year' dropdown set to '2024-2025', followed by dropdowns for 'School', 'Login District', and 'Class Name', and a 'Teacher Name' dropdown. Below these are 'Search', 'Clear Search', and 'Export' buttons. At the bottom of the main area, there is a header for 'Case Load Definition Search Results' and a red 'Add' button.

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

School Year: 2024-2025

Class: Case Load Test Class

School: Harrisburg High School - 20-083-0030-26-0001

Teacher Name: Test Teacher Personnel Search

Location: Case Load Test Locations

Notes: Case Load Test Note

Save Cancel

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

School Year:	<input type="text" value="2024-2025"/>
Class:	<input type="text" value="Case Load Test Class"/>
School:	<input type="text" value="Harrisburg High School - 20-083-0030-26-0001"/>
Teacher Name:	<input type="text" value="Test Teacher"/> Personnel Search
Location:	<input type="text" value="Case Load Test Locations"/>
Notes:	<input type="text" value="Case Load Test Note"/>

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"/>		
Search	Clear Search	Cancel

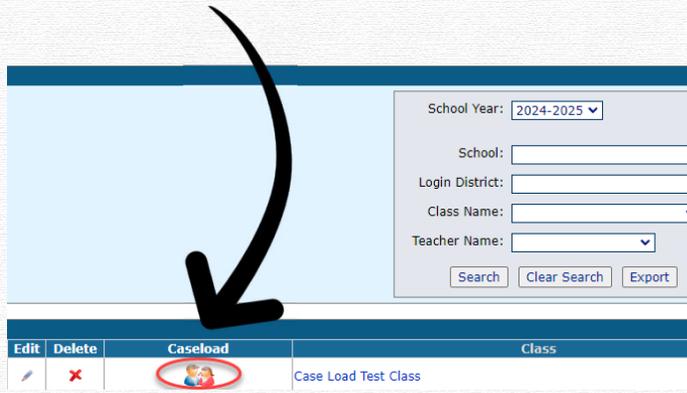
Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on ELIS.

CASE LOAD DEFINITION

Person				
Select	IEIN	Name	Gender	Et
✓	9000029	DemoRoxana J Adams	Female	W
✓	9000161	Train11Chelsey L Bailey	Female	Bl
✓	9000028	DemoAngie D Baker	Female	W
✓	9000003	DemoLina A Bell	Female	U
✓	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 case load



School Year: 2024-2025

School:

Login District:

Class Name:

Teacher Name:

Edit	Delete	Caseload	Class
			Case Load Test Class

Enter a default start date:

Add Multiples

Default Start Date:

08/14/2024 * MM/DD/YYYY

ADDING STUDENTS TO A CASE LOAD

Student SIS ID:

Last Name:

First Name:

School Year:

Status:

Grade:

Term:

Tuition Bill:

Related Services:

EE Code:

Local District ID:

DOB:

Show only Out of District:

Login District for Out of District:

Resident District:

Resident School:

Serving District:

Serving School:

Disability:

Fund:

Program:

Reimbursement Status:

Class Teacher:

Class Name:

Event:

Student Approvals Search Results

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

ADDING STUDENTS TO A CASE LOAD

Use Selected			
Select	Multi Select	Student Name	SIS Id
✓	<input checked="" type="checkbox"/>	Anderson, DemoJavier Brett	999999105
✓	<input checked="" type="checkbox"/>	Diaz, DemoAnya Ashley	999999004
✓	<input checked="" type="checkbox"/>	Flores, DemoCash Grant	999999001
✓	<input checked="" type="checkbox"/>	Flores, DemoCash Grant	999999001
✓	<input checked="" type="checkbox"/>	Mitchell, DemoKayden Kody	999999011
✓	<input checked="" type="checkbox"/>	Mitchell, DemoKayden Kody	999999011
✓	<input checked="" type="checkbox"/>	Price, DemoEamon Oscar	999999024
✓	<input checked="" type="checkbox"/>	Reyes, DemoMateo Angus	999999018
✓	<input checked="" type="checkbox"/>	Roberts, DemoMuriel Hester	999999020
✓	<input checked="" type="checkbox"/>	Rodriguez, DemoOcean Teresa	999999002
✓	<input type="checkbox"/>	Ross, DemoJorge Mark	999999005

- 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

Add Multiples
Default Start Date: 08/14/2024 *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
		999999105	Anderson, DemoJavier Brett	08/14/2024
		999999001	Flores, DemoCash Grant	08/14/2024
		999999011	Mitchell, DemoKayden Kody	08/14/2024
		999999002	Rodriguez, DemoOcean Teresa	08/14/2024
		999999018	Reyes, DemoMateo Angus	08/14/2024
		999999004	Diaz, DemoAnya Ashley	08/14/2024
		999999020	Roberts, DemoMuriel Hester	08/14/2024
		999999024	Price, DemoEamon Oscar	08/14/2024

- 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 (🔍)				
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



- 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

A screenshot of search filters for 'Case Load Definition'. The filters include: School Year (2024-2025), District (dropdown), School (dropdown), Class Name (dropdown), and Teacher Name (dropdown). Below the filters are buttons for 'Search', 'Clear Search', and 'Export'.

Case Load Definition Search Results (Add)			
Caseload	Class	Teacher	School
	Case Load Test Class	Test Teacher	Harrisburg High School

EXPORT/IMPORT CASE LOAD

- Click Export located under the Case Load Definition

School Year: 2024-2025

Class: Case Load Test Class

School: Harrisburg High School - 20-083-0030-26-0001

Teacher Name: Test Teacher

Location: Case Load Test Locations

Notes: Case Load Test Note

Return

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

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 Acrobat 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
	StudentSID	SchoolYear	StartDate	EndDate	DirectMinutes	ConsultMinutes	CaseManager	Note1	Note2	StudentFirstName	StudentMiddleName	StudentLastName
1	999999008	2023	08/18/2022		0	0	N			DemoKip	Maximilian	Cooper
3	999999004	2023	08/18/2022		0	0	N			DemoAnya	Ashley	Diaz
4	999999010	2023	08/18/2022		0	0	N			DemoSabine	Isa	Adams
5	999999013	2023	08/18/2022		0	0	N			DemoLyndon	Hubert	Butler

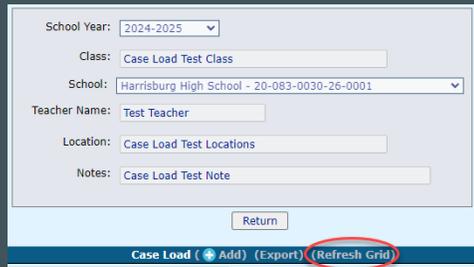
IMPORT EDITED .XLSX

From the Case Load Definition, click Choose File

Browse to locate the saved spreadsheet (.xlsx)

Click Import File

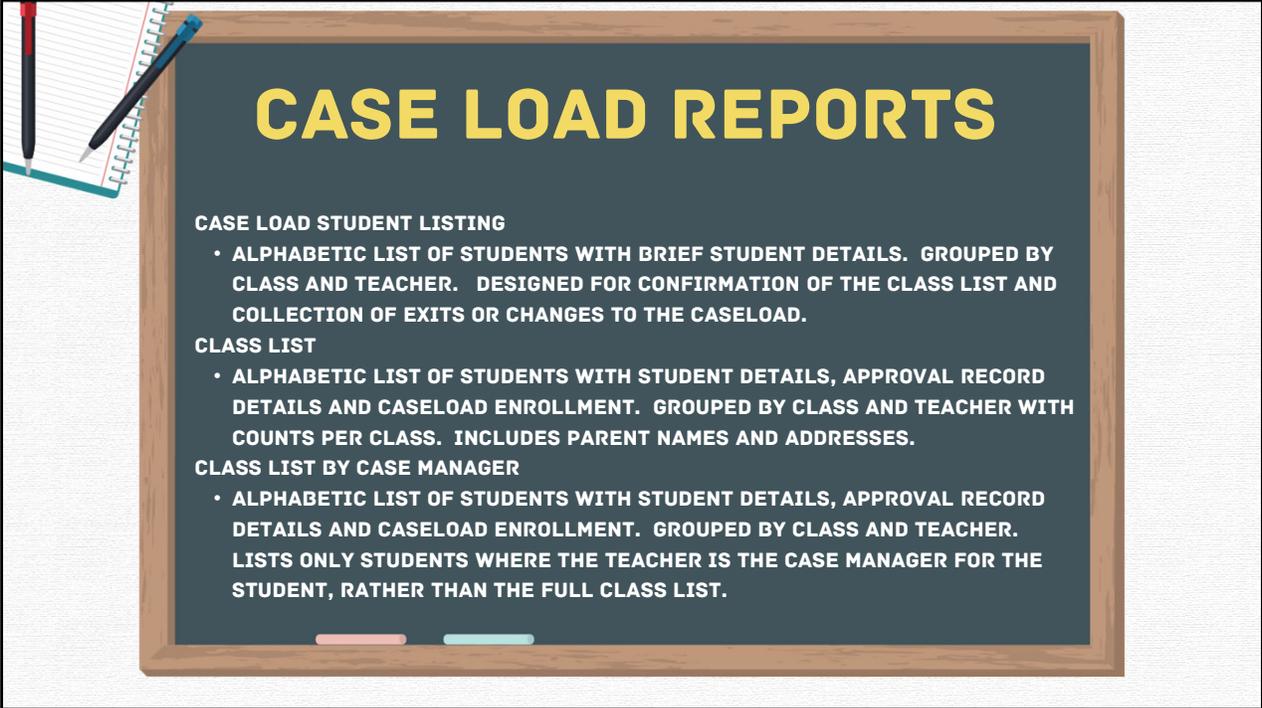
Click Refresh Grid



A screenshot of a web form titled "Case Load Definition". The form contains several fields: "School Year" (dropdown menu showing "2024-2025"), "Class" (text input "Case Load Test Class"), "School" (dropdown menu showing "Harrisburg High School - 20-083-0030-26-0001"), "Teacher Name" (text input "Test Teacher"), "Location" (text input "Case Load Test Locations"), and "Notes" (text input "Case Load Test Note"). A "Return" button is located at the bottom right of the form. Below the form, a navigation bar shows "Case Load" with icons for "Add", "Export", and "Refresh Grid". The "Refresh Grid" icon is circled in red.



A screenshot of an "Import" dialog box. It features a "File Format" dropdown menu set to "Excel", a "File:" field with a "Choose File" button, and a "Skip First Row" checkbox which is checked. The "Import File" button is circled in red. The filename "Caseload Cas...est Class.xlsx" is visible next to the "File:" field.



CASE LOAD REPORTS

CASE LOAD STUDENT LISTING

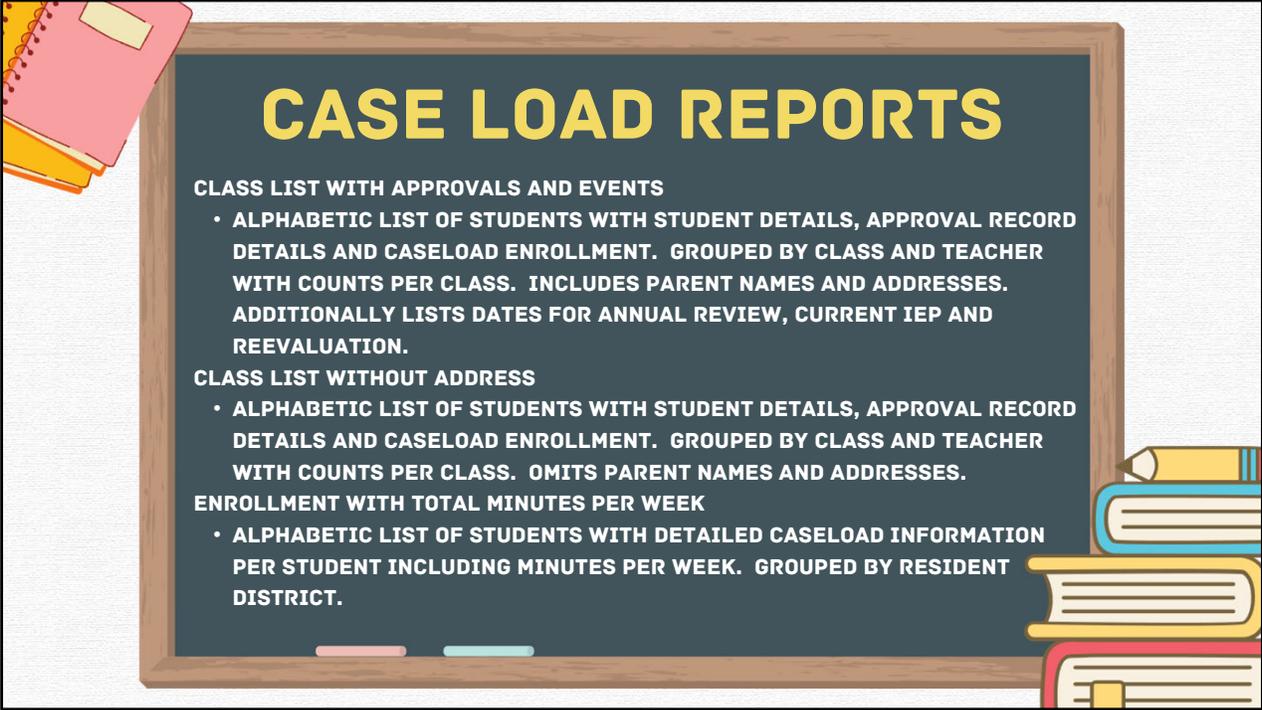
- ALPHABETIC LIST OF STUDENTS WITH BRIEF STUDENT DETAILS. GROUPED BY CLASS AND TEACHER. DESIGNED FOR CONFIRMATION OF THE CLASS LIST AND COLLECTION OF EXITS OR CHANGES TO THE CASELOAD.

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

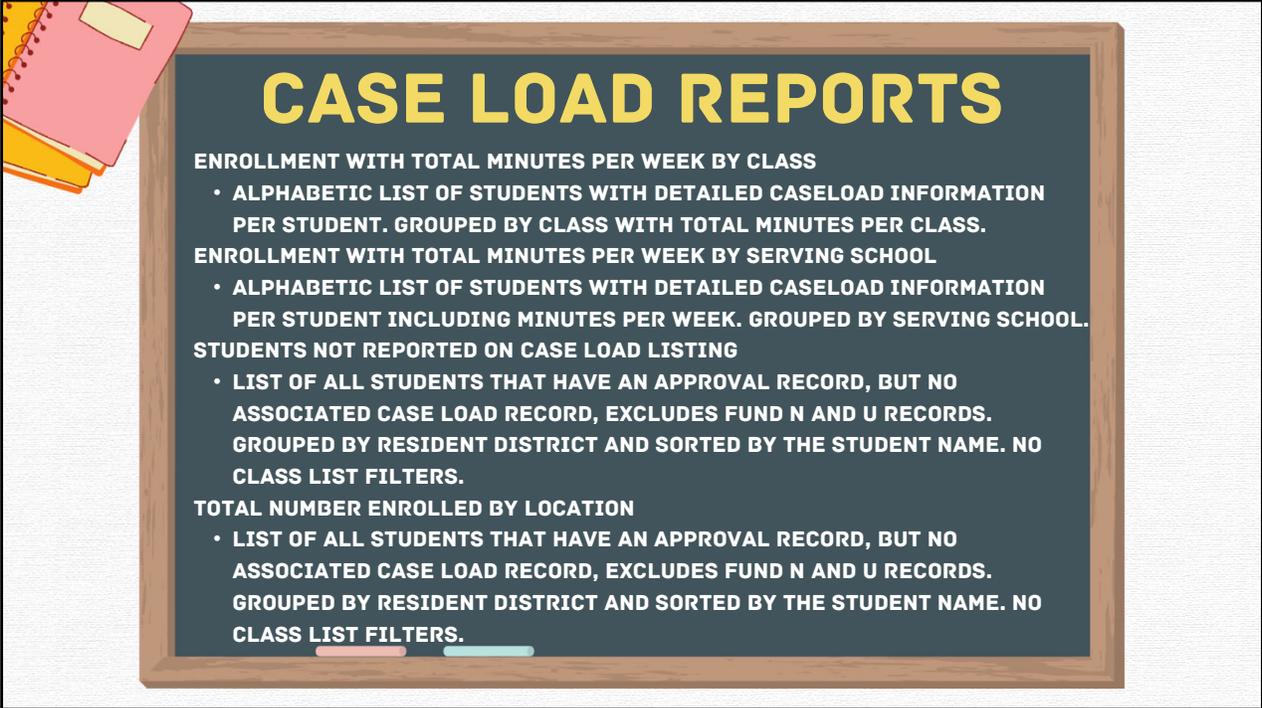
- ALPHABETIC LIST OF STUDENTS WITH STUDENT DETAILS, APPROVAL RECORD DETAILS AND CASELOAD ENROLLMENT. GROUPED BY CLASS AND TEACHER WITH COUNTS PER CLASS. INCLUDES PARENT NAMES AND ADDRESSES. ADDITIONALLY LISTS DATES FOR ANNUAL REVIEW, CURRENT IEP AND REEVALUATION.

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

Harrisburg Project

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