CASE LOAD OVERVIEW

PRESENTED BY: HARRISBURG PROJECT

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OVERVIEW

- Purpose of a Case Load
- Case Load Definitions
- Creating a Case Load
- Case Load Export/Import
- Case Load Reports

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PURPOSE OF A 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

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WHAT IS A CLASS?

- A class consists of anyone providing Related Service Minutes
  - EC Classes, OT, PT, Speech, etc.

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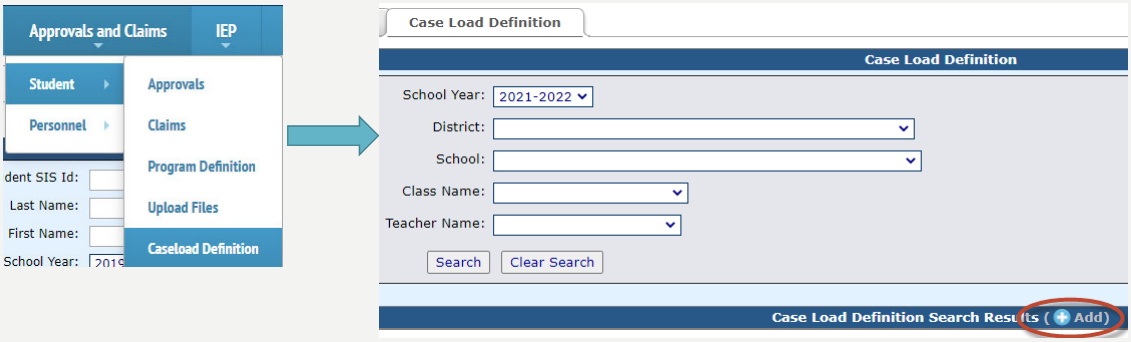
CASE LOAD DEFINITION

Case load definition is the initial set up process to use the Case Load feature in I-Star.

- Approvals and Claims -> Student -> Caseload Definition
- Next, click the Add icon.



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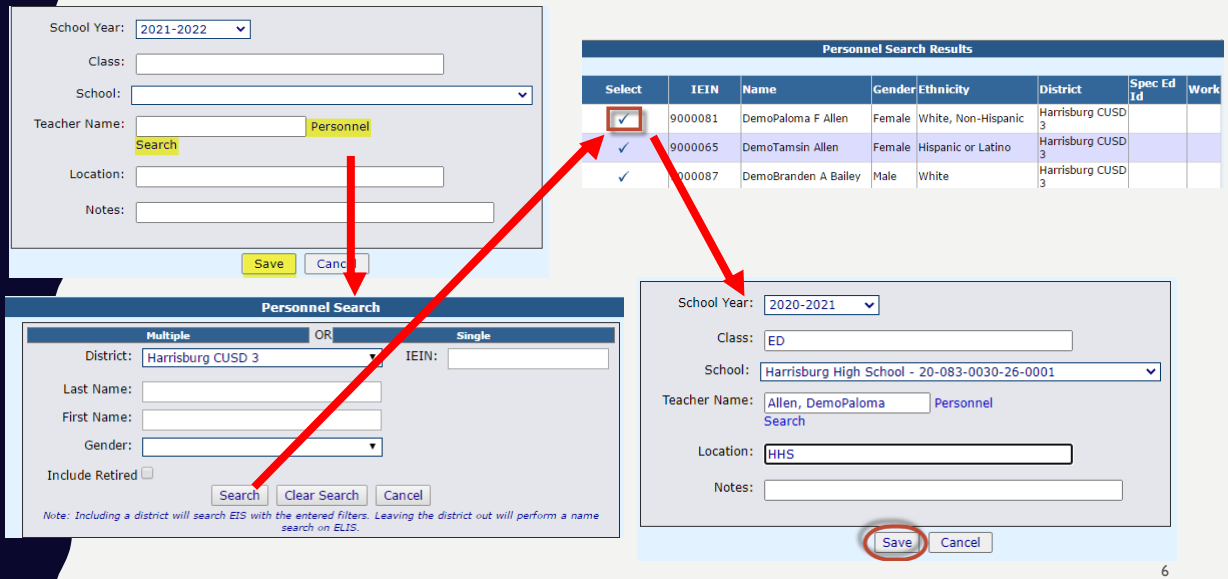
CASE LOAD DEFINITION



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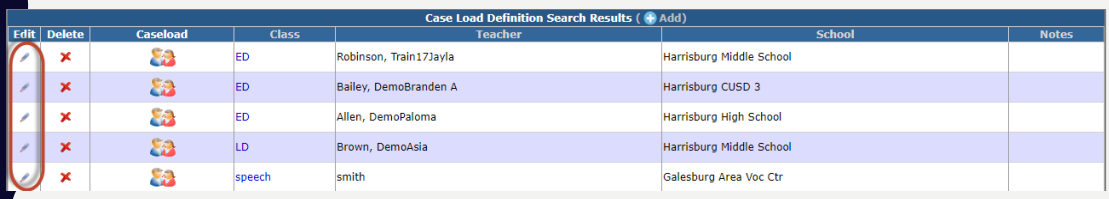
CASE LOAD DEFINITION

- I-Star will bring you back to your Case Load Definition Results
  - To edit a case load definition, click the pencil icon under the edit column or the name of the class to make the appropriate changes.



Case Load Definition Search Results (Add)

Edit	Delete	Caseload	Class	Teacher	School	Notes
			ED	Robinson, Train17Jayla	Harrisburg Middle School	
			ED	Bailey, DemoBranden A	Harrisburg CUSD 3	
			ED	Allen, DemoPaloma	Harrisburg High School	
			LD	Brown, DemoAsia	Harrisburg Middle School	
			speech	smith	Galesburg Area Voc Ctr	

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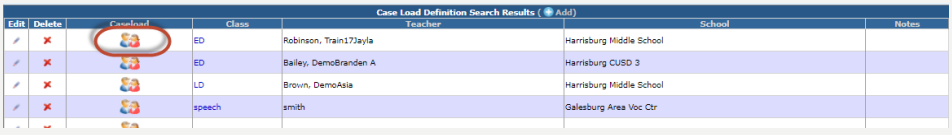
CREATING A CASE LOAD

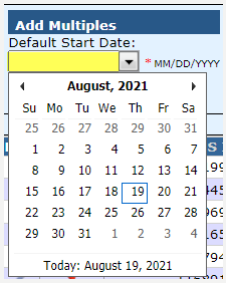
Step 1:
Click the icon to add students to your caseload



Case Load Definition Search Results (Add)

Edit	Delete	Caseload	Class	Teacher	School	Notes
			ED	Robinson, Train17Jayla	Harrisburg Middle School	
			ED	Bailey, DemoBranden A	Harrisburg CUSD 3	
			LD	Brown, DemoAsia	Harrisburg Middle School	
			speech	smith	Galesburg Area Voc Ctr	

Step 2:
Enter a Default Start Date:



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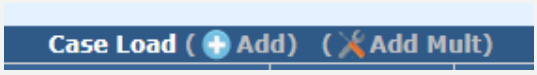
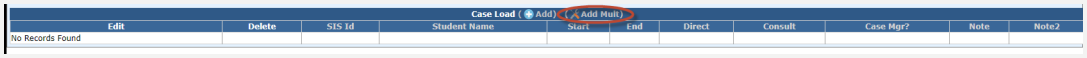
CREATING A CASE LOAD

Step 3:

To add multiple students to your caseload, click "Add Mult".

To add one single student to your caseload, click the Add icon.





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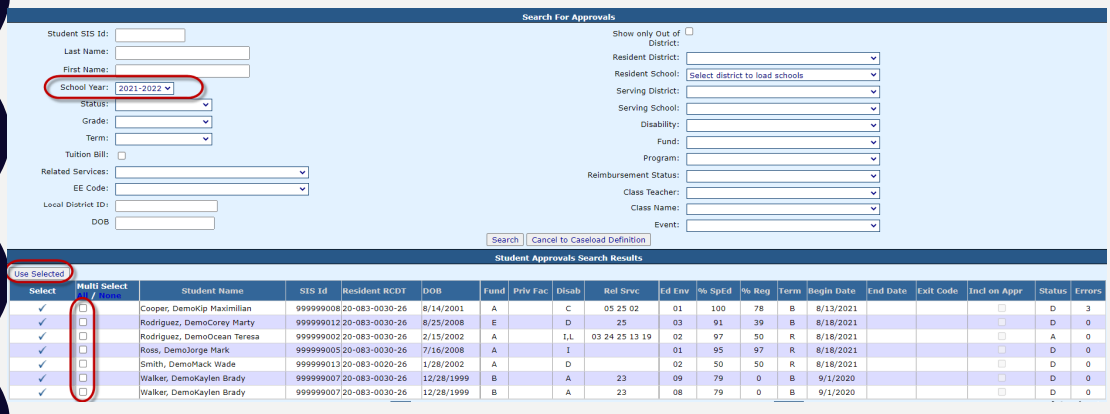
CREATING A CASE LOAD

Step 4:

Search for your desired students and select the checkbox to add multiple students to your caseload. Once you have selected the students you would like to add to your caseload, click "Use Selected."



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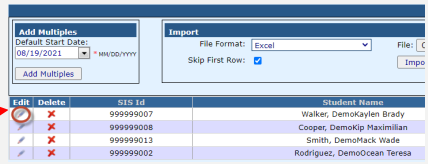
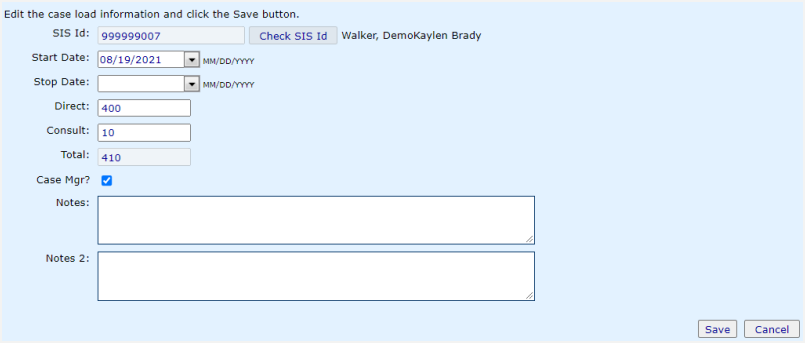
CREATING A CASE LOAD

Step 5:

-This will bring you back to the list of students you have added to your caseload.

- To edit the caseload information, click the pencil icon.





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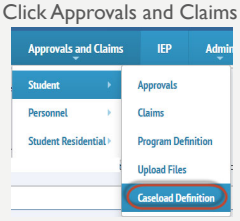
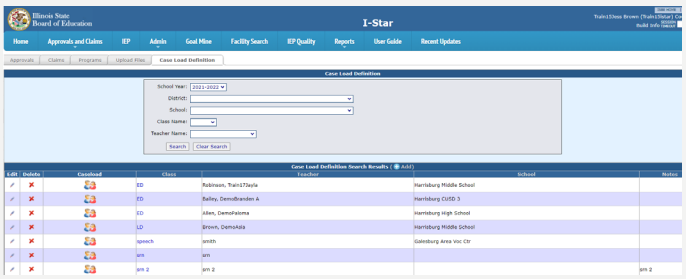
EXPORT CASE LOAD

- Click Approvals and Claims -> Student -> Caseload Definition

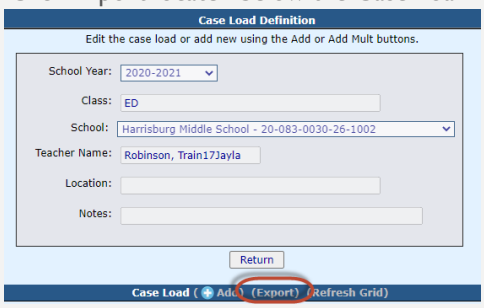


- User Case Load Definition Search filters to view desired Case Load
- Click the Caseload icon in the results grid

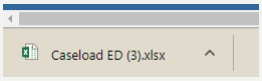


EXPORT CASE LOAD

- Click Export located below the Case Load Definition Information



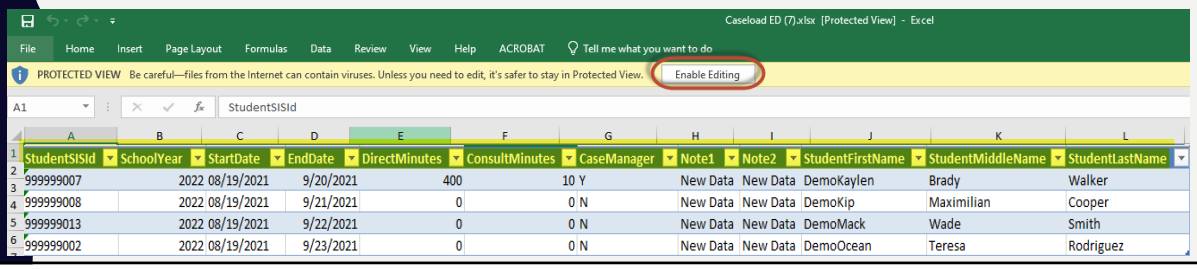
- Click on the .xlsx file at the bottom of the screen



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

EDIT EXPORTED DATA

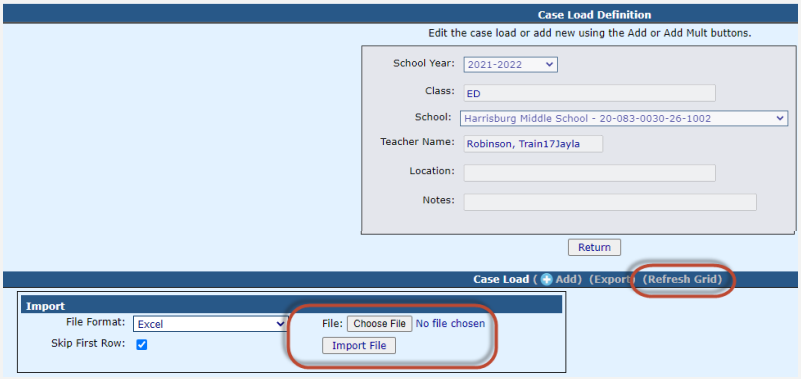
- Click Enable Editing
- Edit data
- DO NOT:
  - Edit Column A or B
  - Edit the Header Row (Row 1)
- Save spreadsheet (.xlsx) with changes to computer/server location
- Close spreadsheet (.xlsx) and return to I-Star Case Load Definition



StudentSISId	SchoolYear	StartDate	EndDate	DirectMinutes	ConsultMinutes	CaseManager	Note1	Note2	StudentFirstName	StudentMiddleName	StudentLastName
999999007	2022	08/19/2021	9/20/2021	400	10	Y	New Data	New Data	DemoKaylen	Brady	Walker
999999008	2022	08/19/2021	9/21/2021	0	0	N	New Data	New Data	DemoKip	Maximilian	Cooper
999999013	2022	08/19/2021	9/22/2021	0	0	N	New Data	New Data	DemoMack	Wade	Smith
999999002	2022	08/19/2021	9/23/2021	0	0	N	New Data	New Data	DemoOcean	Teresa	Rodriguez

IMPORT SPREADSHEET (.XLSX)

- From the Case Load Definition, click Choose File
- Browse to locate the saved spreadsheet (.xlsx)
- Click Import File
- Click Refresh Grid



BEFORE...

StudentSISId	SchoolYear	StartDate	EndDate	DirectMinutes	ConsultMinutes	CaseManager	Note1	Note2	StudentFirstName	StudentMiddleName	StudentLastName
999999007	2022	08/19/2021		400	10	Y			DemoKaylen	Brady	Walker
999999008	2022	08/19/2021		0	0	N			DemoKip	Maximilian	Cooper
999999013	2022	08/19/2021		0	0	N			DemoMack	Wade	Smith
999999002	2022	08/19/2021		0	0	N			DemoOcean	Teresa	Rodriguez

AFTER...

StudentSISId	SchoolYear	StartDate	EndDate	DirectMinutes	ConsultMinutes	CaseManager	Note1	Note2	StudentFirstName	StudentMiddleName	StudentLastName
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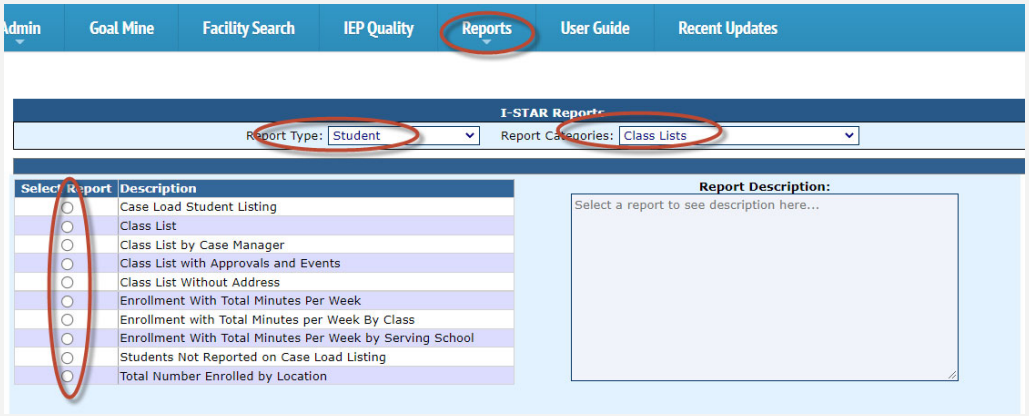
999999008	2022	08/19/2021	05/24/2022	150	5	N	New Data	New Data	DemoKip	Maximilian	Cooper
999999013	2022	08/19/2021	05/25/2022	210	7	N	New Data	New Data	DemoMack	Wade	Smith
999999002	2022	08/19/2021	05/26/2022	315	7	N	New Data	New Data	DemoOcean	Teresa	Rodriguez

CASE LOAD REPORTS

To run a case load report select:

Reports → Report Type: (Student)→ Report Categories: (Class List)→ Select Desired Report



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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.

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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. Omits 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.

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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.

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I-Star

CONTACT:

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With I-Star Questions and Feedback

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