

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.

The screenshot shows the 'Approvals and Claims' menu with 'Caseload Definition' selected. An arrow points to the 'Case Load Definition' form. The form includes fields for School Year (2021-2022), District, School, Class Name, and Teacher Name. A 'Search' button and a 'Clear Search' button are present. At the bottom right, the text 'Case Load Definition Search Results (+ Add)' is circled in red.

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CASE LOAD DEFINITION

This screenshot details the search process. On the left, a 'Personnel Search' form has 'Personnel' selected in a dropdown. A red arrow points from this dropdown to the 'Personnel Search Results' table. Another red arrow points from the first row of the table to the 'Teacher Name' field in the 'Case Load Definition' form on the right. The 'Case Load Definition' form shows School Year: 2020-2021, Class: ED, School: Harrisburg High School - 20-083-0030-26-0001, and Teacher Name: Allen, DemoPaloma. The 'Save' button is circled in red.

Select	IEIN	Name	Gender	Ethnicity	District	Spec Ed Id	Work
<input checked="" type="checkbox"/>	9000081	DemoPaloma F Allen	Female	White, Non-Hispanic	Harrisburg CUSD 3		
<input checked="" type="checkbox"/>	9000065	DemoTamsin Allen	Female	Hispanic or Latino	Harrisburg CUSD 3		
<input checked="" type="checkbox"/>	9000087	DemoBranden A Bailey	Male	White	Harrisburg CUSD 3		

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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:

Add Multiples

Default Start Date:

August, 2021

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: August 19, 2021

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CREATING A CASE LOAD

Step 3:

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

Case Load (+ Add) (✂ Add Mult)

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

Edit	Delete	SIS Id	Student Name	Start	End	Direct	Consult	Case Mgr?	Note	Note2
No Records Found										

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."

Search For Approvals

Student SIS Id:

Last Name:

First Name:

School Year: 2021-2022

Status:

Grade:

Term:

Tuition Bill:

Related Services:

EE Code:

Local District Id:

DOB:

Show only 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

Select	Multi Select	Student Name	SIS Id	Resident RCdT	DOB	Fund	Priv Fac	Disab	Rel Srvc	Ed Env	% SpEd	% Reg	Term	Begin Date	End Date	Exit Code	Incl on Appr	Status	Errors
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Cooper, Demokip Maximilian	999999008/20-083-0030-26	8/14/2001	A		C		05 25 02	01	100	78	B	8/13/2021			<input type="checkbox"/>	D	3
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rodriguez, DemoCorey Marty	999999012/20-083-0030-26	8/25/2008	E		D		25	03	91	39	B	8/18/2021			<input type="checkbox"/>	D	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rodriguez, DemoOcean Teresa	999999002/20-083-0030-26	2/15/2002	A		LL		03 24 25 13 19	02	97	30	R	8/18/2021			<input type="checkbox"/>	A	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ross, Demojorge Mark	999999005/20-083-0030-26	7/16/2008	A		I			04	95	97	R	8/18/2021			<input type="checkbox"/>	D	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Smith, Demofack Wade	999999013/20-083-0020-26	1/28/2002	A		D			02	50	50	R	8/18/2021			<input type="checkbox"/>	D	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walker, Demokaylen Brady	999999007/20-083-0030-26	12/28/1999	B		A		23	09	79	0	B	9/1/2020			<input type="checkbox"/>	D	0
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walker, Demokaylen Brady	999999007/20-083-0030-26	12/28/1999	B		A		23	08	79	0	B	9/1/2020			<input type="checkbox"/>	D	0

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.

Edit	Delete	SIS Id	Student Name
		999999007	Walker, DemoKaylen Brady
		999999008	Cooper, DemoKip Maximilian
		999999013	Smith, DemoMack Wade
		999999002	Rodriguez, DemoOcean Teresa

Edit the case load information and click the Save button.

SIS Id: 999999007 Check SIS Id Walker, DemoKaylen Brady

Start Date: 08/19/2021 MM/DD/YYYY

Stop Date: MM/DD/YYYY

Direct: 400

Consult: 10

Total: 410

Case Mgr?

Notes:

Notes 2:

Save Cancel

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

Edit	Delete	Case Load Definition Search Results	Teacher	School
		00	Address, PatrickDavid	Hamburg Middle School
		00	Bally, Demetrius A	Hamburg CUSD 3
		00	Jalen, Demetrius	Hamburg High School
		00	Brown, Demetrius	Hamburg Middle School
		00	Joseph, Demetrius	Stateburg Area Voc Ctr
		00	00	00

EXPORT CASE LOAD

- Click Export located below the Case Load Definition Information

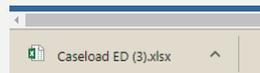
Case Load Definition
Edit the case load or add new using the Add or Add Mult buttons.

School Year: 2020-2021
Class: ED
School: Harrisburg Middle School - 20-083-0030-26-1002
Teacher Name: Robinson, Train17Jayla
Location:
Notes:

Return

Case Load (Add (Export) Refresh Grid)

- 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
999999007	2022	08/19/2021	05/23/2022	400	10	Y	New Data	New Data	DemoKaylen	Brady	Walker
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

The screenshot shows the I-STAR Reports interface. At the top, there is a navigation bar with links: Admin, Goal Mine, Facility Search, IEP Quality, Reports (circled in red), User Guide, and Recent Updates. Below this is the I-STAR Reports header. Underneath, there are two dropdown menus: 'Report Type: Student' (circled in red) and 'Report Categories: Class Lists' (circled in red). Below the dropdowns is a table with two columns: 'Select Report' and 'Description'. The 'Select Report' column contains radio buttons next to the following report names: Case Load Student Listing, Class List, Class List by Case Manager, Class List with Approvals and Events, Class List Without Address, Enrollment With Total Minutes Per Week, Enrollment with Total Minutes per Week By Class, Enrollment With Total Minutes Per Week by Serving School, Students Not Reported on Case Load Listing, and Total Number Enrolled by Location. To the right of the table is a 'Report Description' section with a text box containing the text 'Select a report to see description here...'. The page number '17' is visible in the bottom right corner.

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. 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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With I-Star Questions and
Feedback



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