

- 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: 2016

Case Load Definition

School Year: 2022-2023

School:

Login District:

Class Name:

Teacher Name:

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

School Year: 2022-2023

Class: Case Load Test Class

School: Harrisburg CUSD 3 - 20-083-0030-26-0000

Teacher Name: Test Teacher Personnel Search

Location: Case Load Test School

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: 2022-2023

Class: Case Load Test Class

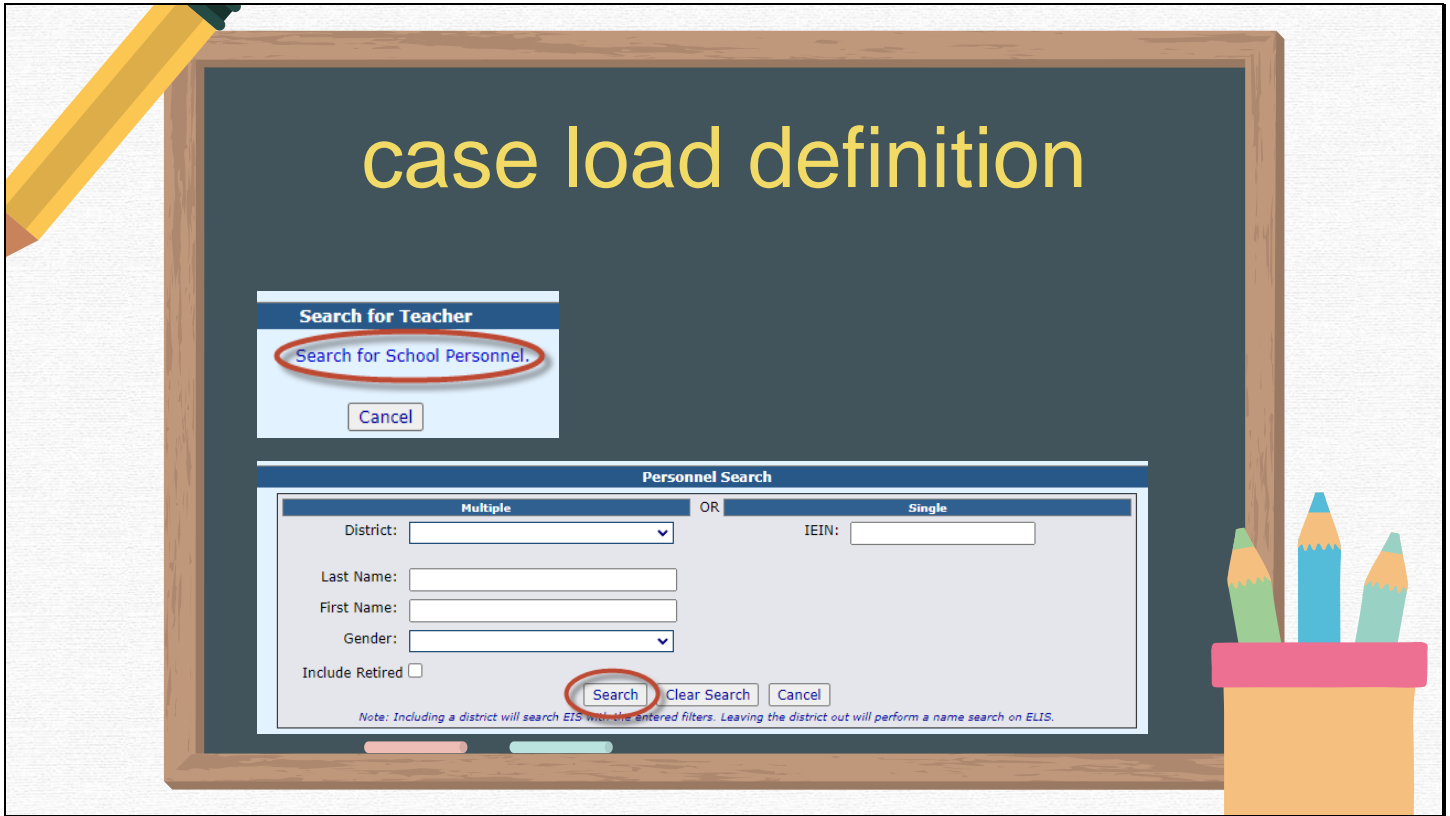
School: Harrisburg CUSD 3 - 20-083-0030-26-0000

Teacher Name: Test Teacher [Personnel](#)
[Search](#)

Location: Case Load Test School

Notes: Case Load Test Note

Save Cancel



case load definition

| Select | IEIN | Name | Gender | E |
|--------|---------|-------------------------|--------|----|
| ✓ | 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 | H |
| ✓ | 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

Approvals | Claims | Programs | Upload Files | **Case Load Definition**

School Year: 2022-2023
District:
School:
Class Name:
Teacher Name:

Search Clear Search

| Edit | Delete | Caseload | Class |
|------|--------|----------|----------------------|
| | | | Case Load Test Class |
| | | | ED |

Enter a default start date:

Add Multiples

Default Start Date:
08/18/2022 * MM/DD/YYYY

Add Multiples

adding students to a case load

The screenshot shows a web form titled "Search For Approvals" with the following fields:

- 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:
- Resident District:
- Resident School:
- Serving District:
- Serving School:
- Disability:
- Fund:
- Program:
- Reimbursement Status:
- Class Teacher:
- Class Name:
- Event:

Buttons: Search, Cancel to Caseload Definition

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 All / None | Student Name |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Adams, DemoSabine Isa |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Adams, DemoSabine Isa |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Butler, DemoLyndon Hubert |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Cooper, DemoKip Maximilian |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Diaz, DemoAnya Ashley |
| <input checked="" type="checkbox"/> | <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)

Add Multiples
Default Start Date: 08/18/2022 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"/> | 999999008 | Cooper, DemoKip Maximilian | 08/18/2022 |
| | <input checked="" type="checkbox"/> | 999999004 | Diaz, DemoAnya Ashley | 08/18/2022 |
| | <input checked="" type="checkbox"/> | 999999010 | Adams, DemoSabine Isa | 08/18/2022 |
| | <input checked="" type="checkbox"/> | 999999019 | Butler, DemoLyndon Hubert | 08/18/2022 |

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

| Edit | Delete | Caseload | Class | Teacher |
|------|--------|----------|----------------------|------------------------|
| | | | Case Load Test Class | Balley, Train11Chelsea |
| | | | ED | Allen, DemoPaloma |
| | | | ED | Robinson, Train17Jayla |
| | | | ED | Balley, DemoBranden A. |
| | | | LD | Brown, DemoAsia |

export/import case load

- Click Export located under the Case Load Definition

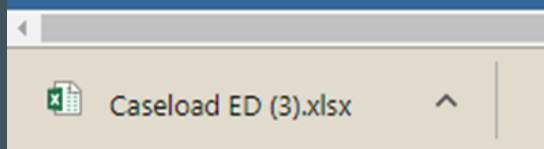
Edit the case load or add new using the Add or Add Mult buttons.

School Year: 2022-2023
Class: Case Load Test Class
School: Harrisburg CUSD 3 - 20-083-0030-26-0000
Teacher Name: Bailey, Train11Chelsey
Location: Case Load Test School
Notes: Case Load Test Note

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

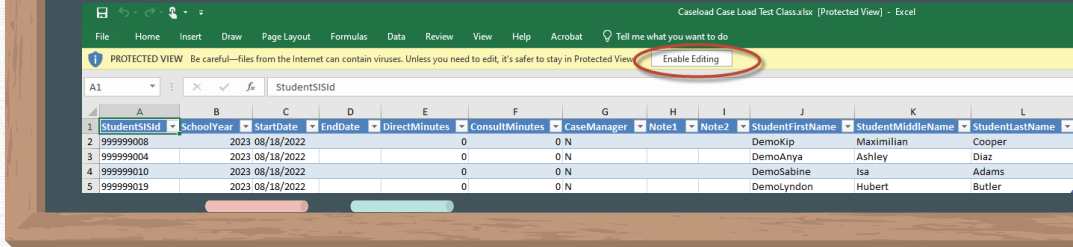
•Edit data

•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



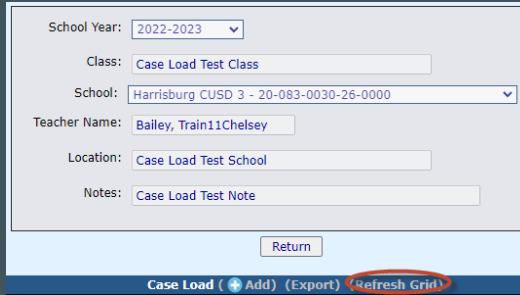
import edited .xlsx

From the Case Load Definition, click Choose File

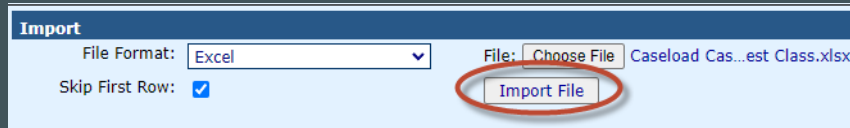
Browse to locate the saved spreadsheet (.xlsx)

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 set to "2022-2023"), "Class" (text input "Case Load Test Class"), "School" (dropdown menu "Harrisburg CUSD 3 - 20-083-0030-26-0000"), "Teacher Name" (text input "Bailey, Train11Chelsey"), "Location" (text input "Case Load Test School"), and "Notes" (text input "Case Load Test Note"). Below the form is a "Return" button. At the bottom of the page, there are navigation links: "Case Load (+ Add) (Export) Refresh Grid". The "Refresh Grid" link is circled in red.



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

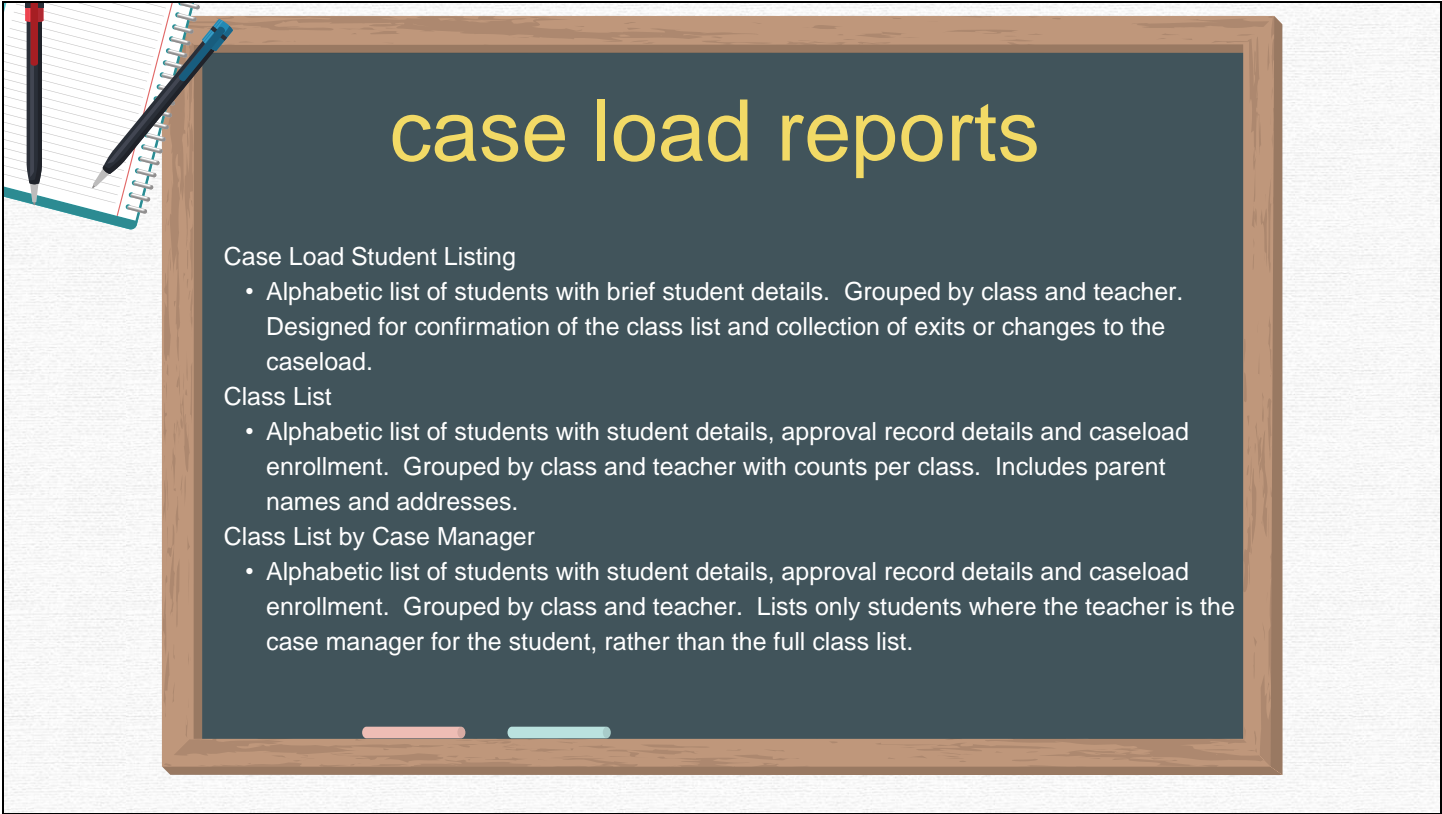
before vs after

Before...

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|--------------|------------|------------|---------|---------------|----------------|-------------|-------|-------|------------------|-------------------|-----------------|
| 1 | StudentSISId | 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 | | | DemoAnya | 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 |

After...

| StudentSISId | SchoolYear | StartDate | EndDate | DirectMinutes | ConsultMinutes | CaseManager | Note1 | Note2 | StudentFirstName | StudentMiddleName | StudentLastName |
|--------------|------------|-----------|---------|---------------|----------------|-------------|-------|-------|------------------|-------------------|-----------------|
| 999999008 | 2023 | 8/25/2022 | | 60 | 10 | N | | | DemoKip | Maximilian | Cooper |
| 999999004 | 2023 | 8/25/2022 | | 40 | 15 | N | | | DemoAnya | Ashley | Diaz |
| 999999010 | 2023 | 8/25/2022 | | 120 | 5 | N | | | DemoSabine | Isa | Adams |
| 999999019 | 2023 | 8/25/2022 | | 200 | 0 | N | | | DemoLyndon | Hubert | Butler |



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.



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.