



I-Star

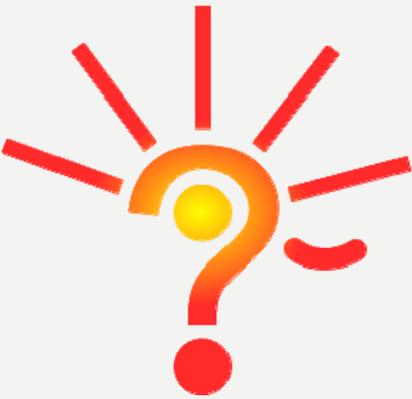
**CASE LOAD
OVERVIEW**

PRESENTED BY: HARRISBURG PROJECT

1

OVERVIEW

- Purpose of a Case Load
- Case Load Definitions
- Creating a Case Load
- Case Load Reports



2

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



3

WHAT IS A CLASS?

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



4

CASE LOAD DEFINITION

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

- In the student section, click Case Load Definition.
- Next, click the Add icon.

The screenshot shows the I-Star navigation menu on the left. Under the 'Student' section, 'Case Load Definition' is highlighted. An arrow points to the 'Case Load Definition' form on the right. The form includes fields for 'School Year' (2019-2020), 'School', 'Class Name', and 'Teacher Name', along with 'Search' and 'Clear Search' buttons. At the bottom right of the form, an 'Add' button is highlighted with a red box.

5

CASE LOAD DEFINITION

- Enter the information for this class definition and click Save.

The screenshot shows the 'Personnel Search Results' table and the 'Personnel Search' form. The table lists three personnel with their details. A red arrow points from the 'Personnel' button in the form to the table. Another red arrow points from the 'Select' checkbox of the first row in the table to the 'Personnel' dropdown in the form. A third red arrow points from the 'Save' button in the form to the 'Personnel' dropdown. The 'Save' button is highlighted with a red box.

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		

6

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	District	Notes
			ED	Mary Poppins	Jasper Co Jr High	

7

CREATING A CASE LOAD

Step 1:

Click the icon to add students to your caseload

Edit	Delete	Caseload	Class	Teacher
			ED	Mary Poppins

Step 2:

Enter a Default Start Date:

Default Start Date:

MM/DD/YYYY

August, 2019

Su	Mo	Tu	We	Th	Fr	Sa
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	5	6	7

Today: August 6, 2019

8

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.

Case Load (+ Add) (Add Mult)										
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."

Home Approvals and Claims IEP Admin Goal Mine Facility Search IEP Quality Reports User Guide

Approvals(Read Only) Claims(Read Only) Programs(Read Only) Case Load Definition

Reported Un-Reported

Student Approvals Filter

Student SIS Id:

Last Name:

First Name:

School Year: 2019-2020

Status:

Grade:

Term:

Show only Out of District:

Login District for Out of District:

Resident District:

Resident School:

Serving District:

Serving School:

Disability:

Fund:

Class Teacher:

Class Name:

Event:

Search Clear Search Recheck Edits Export to Excel Export using Import Format

Student Approvals Search Results

Use Selected Multi Select

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 checked="" type="checkbox"/>	Rodriguez, DemoOcean Teresa	999999002	20-083-0030-26	2/15/2002	A		D		03	91	25	R	8/20/2018			<input type="checkbox"/>	D	3
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Young, DemoWilliam Roy	999999003	20-083-0030-26	8/2/2001	A		D		02	93	66	R	8/20/2018			<input type="checkbox"/>	D	3
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Walker, DemoKaylen Brady	999999007	20-083-0030-26	12/28/1999	B	10314-T	A	23	08	79	0	B	8/20/2018			<input type="checkbox"/>	D	4
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Reyes, DemoMateo Angus	999999018	20-083-0030-26	2/7/2000	X		D,K		03	95	10	R	8/20/2018			<input type="checkbox"/>	D	0
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	King, DemoNishka Dani	999999022	20-083-0030-26	2/20/1996	B	13616-T	O	03 13 23 25 22 28 20	08	100	0	B	8/20/2018			<input type="checkbox"/>	D	8

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 the case load information and click the Save button.

SIS Id: Rodriguez, DemoOcean Teresa

Start Date: MM/DD/YYYY

Stop Date: MM/DD/YYYY

Direct:

Consult:

Total:

Case Mgr?

Notes:

Notes 2:

Default Start Date: MM/DD/YYYY

Case Load () ()

Edit	Delete	SIS Id	Student Name	Start	End	Direct	Consult	Case Mgr?	Note	Note2
		999999002	Rodriguez, DemoOcean Teresa	August 6, 2019		0	0	False		
		999999003	Young, DemoWilliam Roy	August 6, 2019		0	0	False		
		999999007	Walker, DemoKaylen Brady	August 6, 2019		0	0	False		
		999999018	Reyes, DemoMateo Angus	August 6, 2019		0	0	False		

CASE LOAD REPORTS

To run a case load report select:

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

Admin | Goal Mine | Facility Search | IEP Quality | **Reports** | User Guide

I-STAR Reports

Report Type: Report Categories:

Select Report	Description
<input type="radio"/>	Case Load Student Listing
<input type="radio"/>	Class List
<input type="radio"/>	Class List by Case Manager
<input type="radio"/>	Class List with Approvals and Events
<input type="radio"/>	Class List Without Address
<input type="radio"/>	Enrollment With Total Minutes Per Week
<input type="radio"/>	Enrollment With Total Minutes Per Week by Serving School
<input type="radio"/>	Total Number Enrolled by Location

Report Description:

Select a report to see description here...

CASE LOAD REPORTS

Within the reports tab you can:

- Sort by desired filters
- Run or Export the selected report.

Reports Filters

Student SIS Id: <input type="text"/> School Year: <input type="text" value="2019-2020"/> Gender: <input type="text"/> Grade: <input type="text"/> Term: <input type="text"/> Ethnicity: <input type="text"/> Private Facility: <input type="text"/> Class Name: <input type="text"/> Teacher Name: <input type="text"/> Location Name: <input type="text"/> Age: <input type="text"/>	Related Service: <input type="text"/> Resident District: <input type="text"/> Serving District: <input type="text"/> Serving School: <input type="text"/> Disability: <input type="text"/> Fund: <input type="text"/> Indicator Errors: <input type="text"/> Include on Approval: <input type="text"/> Error Type: <input type="text"/>
---	---

For Approval Records
 Choose only one. If no options are selected, then all records will be returned(including future dated)

Active as of today:

Active on Child Count Date:

Active as of:

Only Future Dated:

For Caseload Enrollment Records
 Choose only one. If no options are selected, then all records will be returned(including future dated)

Active Enrollment:

Future Enrollment:

13

I-STAR RESOURCE WEBSITE

WWW.HBUG.K12.IL.US

Home

SIS

PMS

Resources

Events

SIP

Contact Us

[See you at Director's Conference!](#)

Hot Topics

- Director's Conference 2019
- EBF Offset Determination Help
- ISBE AFR Directory
- How to Locate Your BFN

Manuals & Guides

- I-Star User Guide (updated 2/21/2019)
- Students with Disabilities Data Collection and Approval Instructions (november 2018)
- Changes in Students with Disabilities Approval Instructions October 2018
- Students with Disabilities Reimbursement Instructions March 2018
- Changes in Students with Disabilities Reimbursement Instructions (november 2018)
- Special Education Personnel Approval Instructions (june 2018)
- Changes in Special Education Personnel Instructions (june 2018 to April 2018)
- Changes in Special Education Personnel Instructions (june 2018 to April 2018)

Deadlines

- June 28, 2019 - Personnel Approval Due in I-Star
- July 15, 2019 - Expense Cost (Fund X2) & Orphanage (Fund 082) Approval - Student Claim Due in I-Star
- July 24-26, 2019 - Director's Conference, Springfield
- **August 15, 2019 - Private Facility (Fund B) Student Claim Due in I-Star**

Student Profile & Approval

- Approvable New User (news) • 8/16/2018
- Approvable Refresher (news) • 11/20/2018
- Cardinal Overview (news)
- Transportation (news)
- Events Overview (news)
- Using the End/Add Function
- LEA Maintenance (news)
- Rollover/Mass Change (2018) (news)
- Indicator 1.3 (news) • How to View Student Profile

Student Claims

- I-Star Fund E Claims (news) (2 & 4) • 4/10/2019
- I-Star Fund F Claims (news) (2 & 4) • 8/21/2019
- I-Star Fund X Claims (news) (2 & 4) • 8/16/2018
- I-Star Fund B Claims (news) (2 & 4) • 8/16/2018
- I-Star All Claims (news) • 8/11/2019
- SMOGA Tuition Cost Sheet XLS
- Summer Orphanage Claims
- Add Multiples to Case Load

Personnel Approval

- Personnel Snapshot (news) (2 & 4) • 8/20/2019
- AFR 2019 • 8/20/2019
- Personnel Changes (news) • 8/14/2019
- EBF Distribution
- Part 130 Proposed Changes
- HED Q & A
- Create an ELS Account

Recently Added

How questions? Contact us: ahughes@hbug.k12.il.us (866) 652-5174
 Copyright © 2019, Illinois State Board of Education

14



I-Star



Contact:

Harrisburg Project

(800) 635-5274

support@hbug.k12.il.us



With I-Star Questions and
Feedback