



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, there is a navigation menu with the following items: Approvals and Claims (with a sub-menu for IEP), Student (with sub-menus for Approvals and Claims), Personnel (with sub-menus for Program Definition, Upload Files, and Caseload Definition), and a search section with fields for Student SIS Id, Last Name, First Name, and School Year (set to 2010). The main content area features a search form with the following fields: School Year (set to 2023-2024), District, School, Class Name, and Teacher Name. Below these fields are buttons for Search, Clear Search, and Export. At the bottom of the search results area, there is a 'Case Load Definition Search Result' section with an 'Add' button circled in red.

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: 2023-2024

Class: Case Load Test Class

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

Teacher Name: Test Teacher Personnel
Search

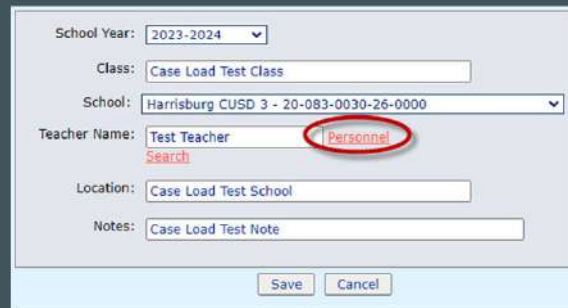
Location: Case Load Test School

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



The screenshot shows a web form for defining a case load. The fields are as follows:

School Year:	2023-2024
Class:	Case Load Test Class
School:	Harrisburg CUSD 3 - 20-083-0030-26-0000
Teacher Name:	Test Teacher
Location:	Case Load Test School
Notes:	Case Load Test Note

At the bottom of the form are "Save" and "Cancel" buttons. A red circle highlights the "Personnel" button next to the "Teacher Name" field, which is also labeled with a "Search" link below it.

CASE LOAD DEFINITION

Search for Teacher
Search for School Personnel.
Cancel

Personnel Search

Multiple OR Single

District: IEIN:

Last Name:

First Name:

Gender:

Include Retired

Search Clear Search Cancel

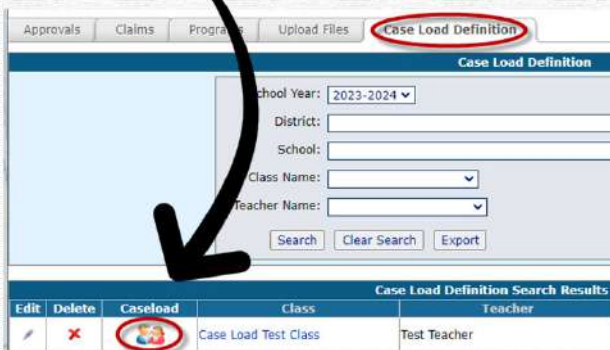
Note: Including a district will search EIS with the entered filters. Leaving the district out will perform a name search on EIS.

CASE LOAD DEFINITION

Person				
Select	IEIN	Name	Gender	El
✓	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



Case Load Definition

School Year: 2023-2024
District:
School:
Class Name:
Teacher Name:

Search Clear Search Export

Case Load Definition Search Results				
Edit	Delete	Caseload	Class	Teacher
			Case Load Test Class	Test Teacher

Enter a default start date:



Add Multiples

Default Start Date:
08/11/2023 * MM/DD/YYYY

Add Multiples

ADDING STUDENTS TO A CASE LOAD

Search For Approvals

Student SIS Id: <input type="text"/>	Show only Out of District: <input type="checkbox"/>
Last Name: <input type="text"/>	Resident District: <input type="text"/>
First Name: <input type="text"/>	Resident School: <input type="text"/>
School Year: <input type="text"/>	Serving District: <input type="text"/>
Status: <input type="text"/>	Serving School: <input type="text"/>
Grade: <input type="text"/>	Disability: <input type="text"/>
Term: <input type="text"/>	Fund: <input type="text"/>
Tuition Bill: <input type="checkbox"/>	Program: <input type="text"/>
Related Services: <input type="text"/>	Reimbursement Status: <input type="text"/>
EE Code: <input type="text"/>	Class Teacher: <input type="text"/>
Local District ID: <input type="text"/>	Class Name: <input type="text"/>
DOB: <input type="text"/>	Event: <input type="text"/>

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

Edit	Delete	SIS Id	Student Name	Start
<input type="checkbox"/>	<input checked="" type="checkbox"/>	999990010	Adams, DemoSabrina Jsa	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990018	Anderson, Demozopher Brent	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990015	Cox, DemoFranklyn Mohamad	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990002	Rodriguez, DemozOcean Teresa	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990003	Young, DemozWilliam Roy	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990007	Walker, DemozCaylen Brady	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990019	Butler, DemozLyndon Hubert	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990008	Cooper, DemozKip Masimilian	08/11/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	999990004	Diaz, DemozAnyz Ashley	08/11/2023

- 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

Edit		Delete		Case Load	Class	Teacher
				Case Load Test Class		Bailey, Train11Chelsey
				ED		Allen, DemoPaloma
				ED		Robinson, Train17Javla
				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

Case Load Definition

School Year: 2023-2024
District: [Dropdown]
School: [Dropdown]
Class Name: [Dropdown]
Teacher Name: [Dropdown]
Search Clear Search Export

Edit	Delete	Case Load	Class	Teacher	School	Notes
[Icon]	[X]	[Icon]	Case Load Test Class	Test Teacher	Harrisburg CUSD 3	Case Load Test Note
[Icon]	[X]	[Icon]	Case Load Test Class	Bailey, Train11,Chelbey	Harrisburg CUSD 3	Case Load Test Note
[Icon]	[X]	[Icon]	Case Load Test Class	Bailey, Train11,Chelbey	Harrisburg CUSD 3	Case Load Test Note

EXPORT/IMPORT CASE LOAD

- Click Export located under the Case Load Definition

School Year: 2023-2024
Class: Case Load Test Class
School: Harrisburg CU50 3 - 20-083-0030-26-0000
Teacher Name: Test Teacher
Location: Case Load Test School
Notes: Case Load Test Note

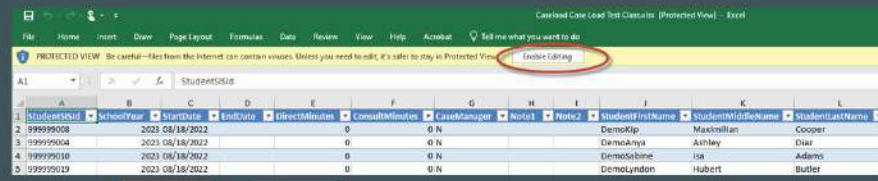
Return

Case Load (Adid) (Export) (Refresh: Ctrl)

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



The screenshot shows the Microsoft Excel interface in Protected View. The title bar reads "CaseLoad Case Load Test Classlist (Protected View) - Excel". The ribbon includes File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Help, and Account. A yellow warning bar at the top states "PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View." and contains an "Enable Editing" button circled in red. The spreadsheet data is as follows:

StudentID	SchoolYear	StartDate	EnrollDate	DirectMinutes	ConsultMinutes	CaseManager	Notes	Photo	StudentFirstName	StudentMiddleName	StudentLastName
99999908		2023 08/18/2022		0	0 N				DemoKip	Maximilian	Cooper
99999904		2023 08/18/2022		0	0 N				DemoAnya	Ashley	Diaz
99999910		2023 08/18/2022		0	0 N				DemoSibone	Isa	Adams
99999919		2023 08/18/2022		0	0 N				DemoLyndon	Hubert	Butler


IMPORT EDITED .XLXS

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 input fields: "School Year" (dropdown menu showing "2023-2024"), "Class" (text input with "Case Load Test Class"), "School" (dropdown menu showing "Harrisburg CUSD 3 - 20-063-0030-26-0000"), "Teacher Name" (text input with "Test Teacher"), "Location" (text input with "Case Load Test School"), and "Notes" (text input with "Case Load Test Note"). A "Return" button is located at the bottom right of the form. Below the form, a navigation bar includes "Case Load", "Add", "Export", and "Refresh Grid" (circled in red).



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



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

(800) 635-5274

support@hbug.k12.il.us

