

The image shows a chalkboard with a wooden frame. On the right side of the board, the word "TOPICS" is written in colorful chalk. Below the word are several pieces of chalk in various colors (pink, orange, yellow, green, blue). On the left side of the board, there is a list of topics. At the bottom of the board, there are two small pieces of chalk, one pink and one light blue.

- 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
- Personnel
- Approvals
- 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:

Search Clear Search

Case Load Definition Search Result > **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

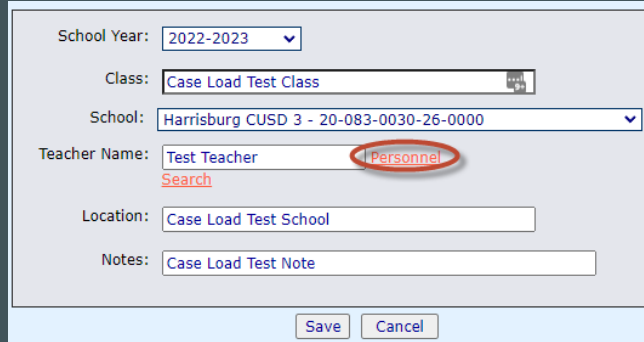
Location: Case Load Test School

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

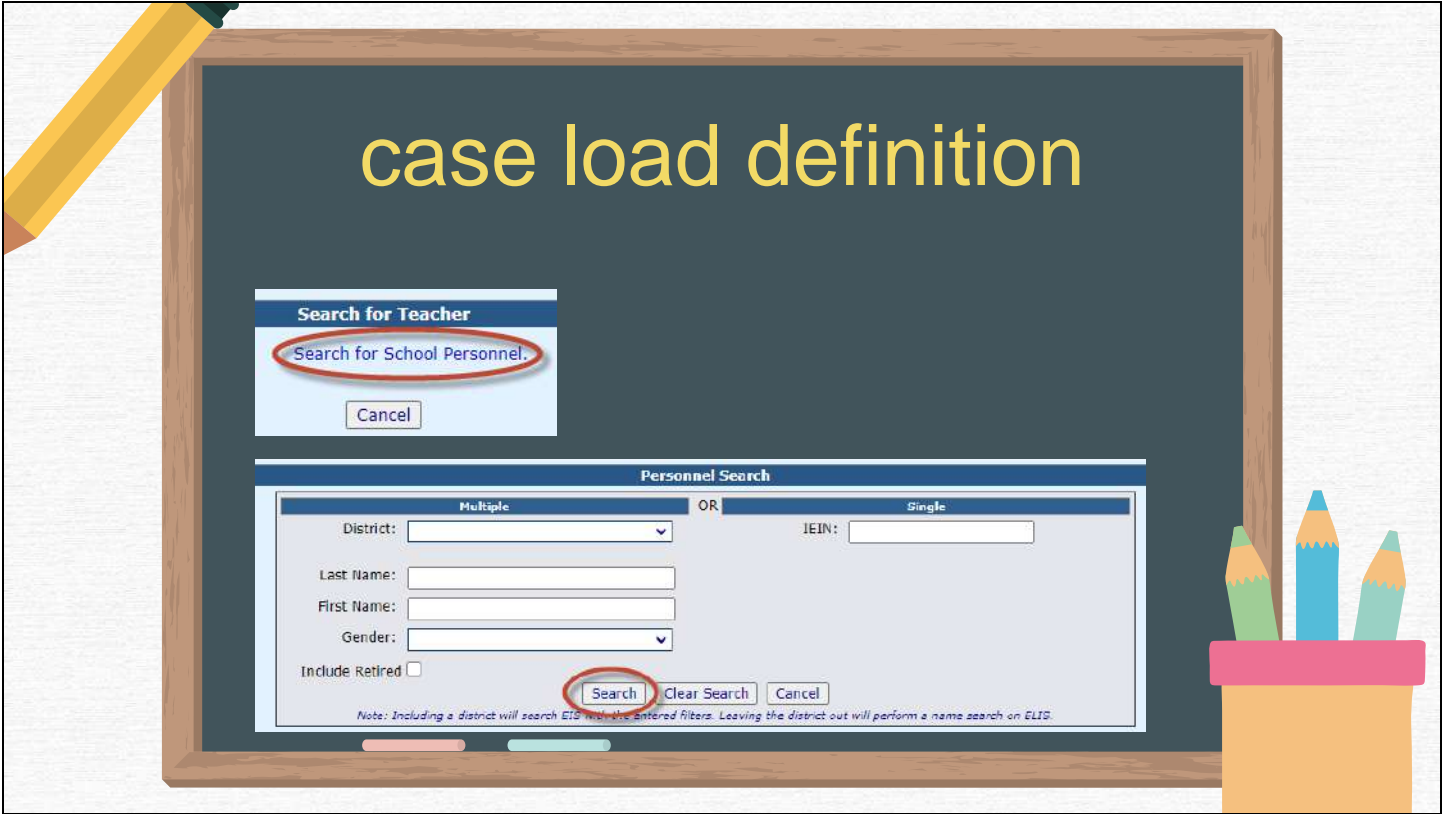
School: Harrisburg CUSD 3 - 20-083-0030-26-0000

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

The screenshot shows a web application interface with a navigation menu at the top containing 'Approvals', 'Claims', 'Programs', 'Upload Files', and 'Case Load Definition'. The 'Case Load Definition' tab is selected and circled in red. Below the menu is a form with fields for 'School Year' (set to 2022-2023), 'District', 'School', 'Class Name', and 'Teacher Name'. A 'Search' button is circled in red. At the bottom, a table lists classes with columns for 'Edit', 'Delete', 'Caseload', and 'Class'. The 'Caseload' column for the first row, 'Case Load Test Class', contains an icon of three people, which is circled in red. A large black arrow points from this icon towards the 'Add Multiples' dialog box on the right.

Enter a default start date:

The 'Add Multiples' dialog box has a title bar 'Add Multiples' and a label 'Default Start Date:'. Below the label is a date input field containing '08/18/2022' and a dropdown arrow, with a red asterisk and the text '* MM/DD/YYYY' to its right. At the bottom of the dialog, an 'Add Multiples' button is circled in red.

adding students to a case load

The screenshot shows a web interface titled "Search For Approvals". It contains several search criteria fields:

- Student SIG Id: [text input]
- Last Name: [text input]
- First Name: [text input]
- School Year: [dropdown menu, selected: 2022-2023]
- Status: [dropdown menu]
- Grade: [dropdown menu]
- Term: [dropdown menu]
- Tuiben Bill: [checkbox]
- Related Services: [dropdown menu]
- EE Code: [dropdown menu]
- Local District ID: [text input]
- DOB: [text input]
- Show only Out of District: [checkbox]
- Resident District: [dropdown menu]
- Resident School: [dropdown menu, selected: Select district to load schools]
- Serving District: [dropdown menu]
- Serving Schools: [dropdown menu]
- Disability: [dropdown menu]
- Fund: [dropdown menu]
- Program: [dropdown menu]
- Reimbursement Status: [dropdown menu]
- Class Teacher: [dropdown menu]
- Class Name: [dropdown menu]
- Event: [dropdown menu]

Buttons: [Search] [Cancel to CaseLoad Definition]

Text below form: 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

Edit	Delete	SIS Id	Student Name	Start
	<input checked="" type="checkbox"/>	999999008	Cooper, DemoKip Maximilian	08/18/2022
	<input checked="" type="checkbox"/>	999999004	Diaz, DemoAriya 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	Case Load	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

Case Load Definition

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

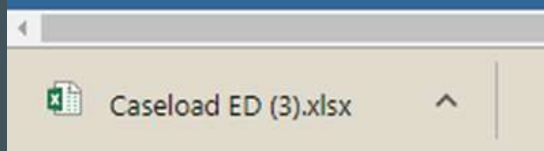
Full	Delete	Caseload	Class	Teacher
✓	✗		Case Load Test Class	Baltes, Train11Chelouy
✓	✗		ED	Allen, DetroitPaloma
✓	✗		ED	Robinson, Train11Tavia
✓	✗		ED	Baltes, DetroitDenden A
✓	✗		LD	Braun, DetroitAria

export/import case load

- Click Export located under the Case Load Definition

Case Load (Add (Export) Refresh Grid)

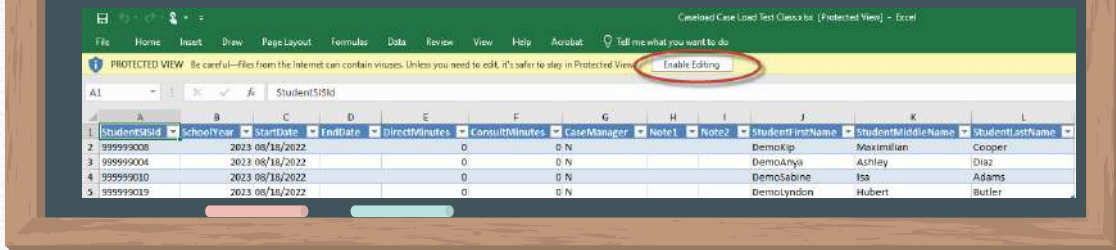
- Click on the .xlsx file at the bottom of the screen



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 .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 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"). A "Return" button is located below the form. 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 features 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.

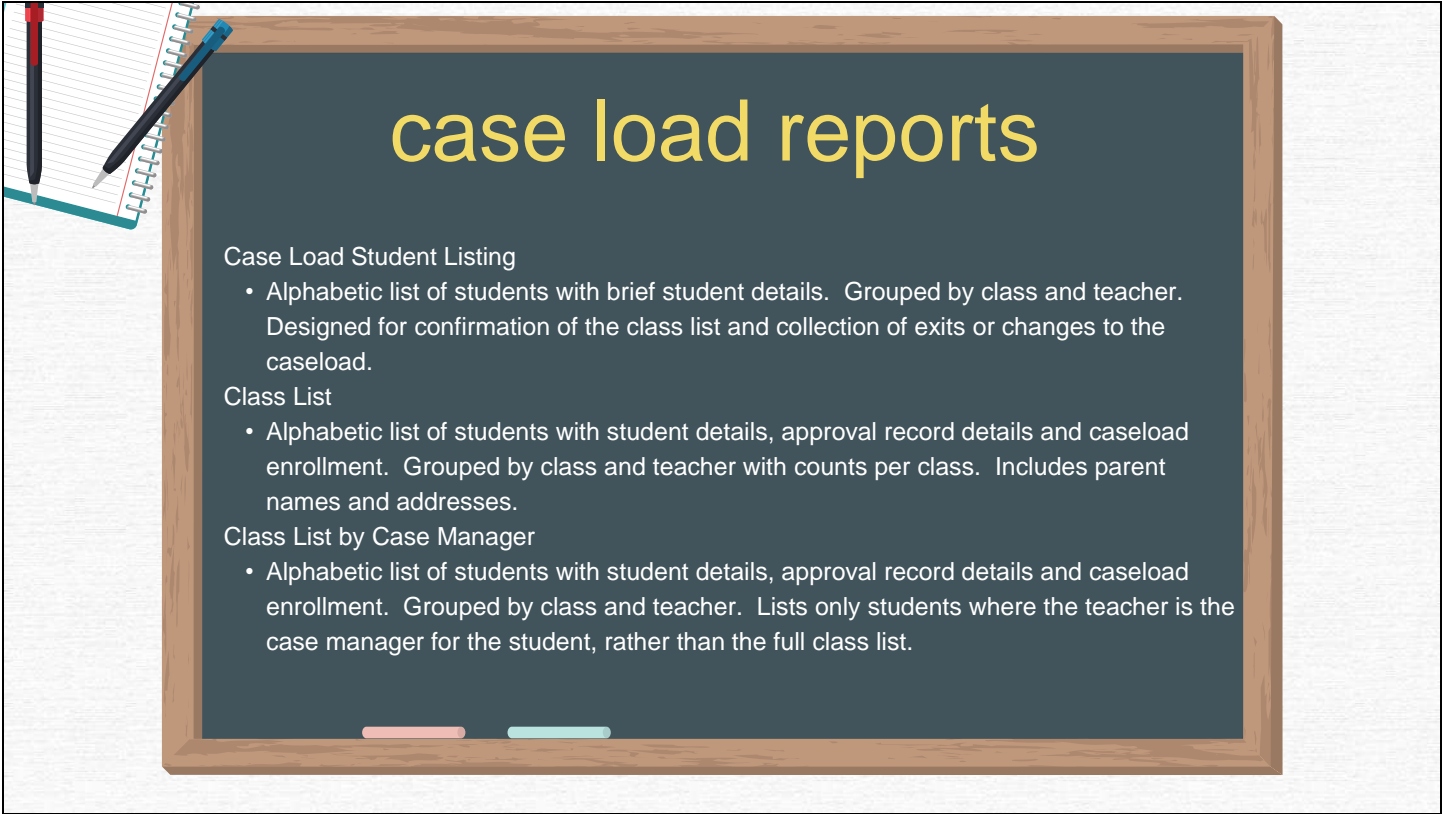
before vs after

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.