

Manage Your Caseload

Starring/unstarring documents adds/removes documents from your **Caseload**.

- Stars are unique to your user account. Starring/unstarring a document in your account does not affect other users.
- You may star/unstar documents onscreen manually.
- A document is automatically starred in your account when you are added as a collaborator.
- We recommend users star documents they are actively working on throughout the year. Once further work is not expected or a quick link to the document is no longer needed, users should unstar documents to remove them from their caseload. This functionality allows users to manage their caseloads regardless of actions by other team members.

Add documents

Steps *To add documents to your caseload:*

1. Visit a document list page that shows the document you wish to star (e.g. **All** or **Students/ create new**).
2. Star the document(s).
3. Visit **Caseload** in the left menu. The document will now be visible in the caseload list (and will also continue to appear in your **All** list). If the student for this document was not previously listed in your My Students List, it will now appear.

💡 Tip If you visit a student whom you know has documents, but you do not see them, it may be that the owner of the documents have not shared them with you (e.g. the previous case manager or current document owner). Contact the owner of the document or an administrative user to share the documents with you.

Remove documents

To remove documents from your caseload:

1. Unstar a starred document either from your **Caseload** page or by clicking the student's name in your **My Students** list.
2. The document will no longer appear in your **Caseload** list. However, if you search for the document under **All** or by searching under the student, the document will still be accessible. It can be re-starred at any time if needed.
3. If the document that was unstarred was the last document you had starred for a given student, that student will now drop out of your My Students List

💡 Tip If you are removing many students (e.g. clearing your caseload from a previous year) you can also search the name of the student from the **Students/create new** menu on the left menu. After clicking their name, you can unstar any remaining yellow starred documents. This will remove them from your **Caseload** list, as well as, your My Students List.