

TRACKING ITEM MANAGEMENT PROCESS

Purpose

This document is intended to outline steps support staff can take to document outreach & interventions for students with notifications (Flags, Referrals, To-dos).

In summary, the document will walk users through the process of:

- ✓ **Locating** your active tracking item list
- ✓ **Providing Outreach** to establish direct interactions with students.
- ✓ **Document** Outreach Attempts.
- ✓ **Clearing** flag notifications and “closing the loop” with faculty based on closure reasons: Positive, Negative, or Neutral.

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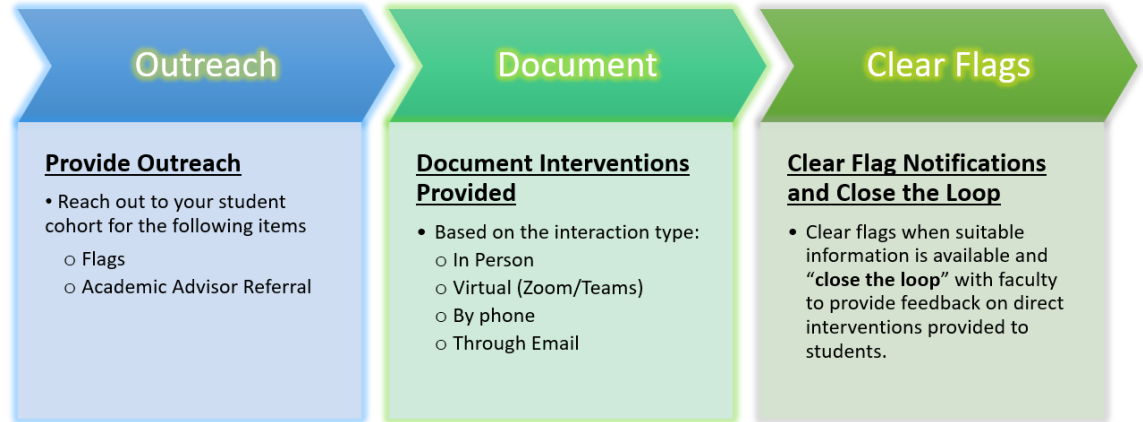
- ✓ [Login to Starfish](#)
- ✓ [Search for your Flagged Students](#)
- ✓ [Filter for "Unassigned" Tracking Items](#)
- ✓ [Providing Outreach to Multiple Students at Once](#)
- ✓ [Providing Personalized Outreach to a Unique Student](#)
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- ✓ [Resolving or Clearing a Single Flag](#)
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Tracking Item Management Process (General Overview)

First Intervention Effort

1. [Login to Starfish](#)
2. [Navigate to your Active Tracking Item List & Filter for your Academic Advisor Connection](#)
3. Create Additional Filters for
 - [Specific Tracking Items that are unassigned to other Campus Support Staff](#)
4. Perform/Document Outreach
 - [Could be Bulk Outreach with a General Message to Multiple Students at Once](#)
 - Use General Flag Outreach Templates
 - [Could be Personalized Outreach to a Unique Student](#)
 - Use Personalized Flag Outreach Templates
5. Record Outreach Date Range



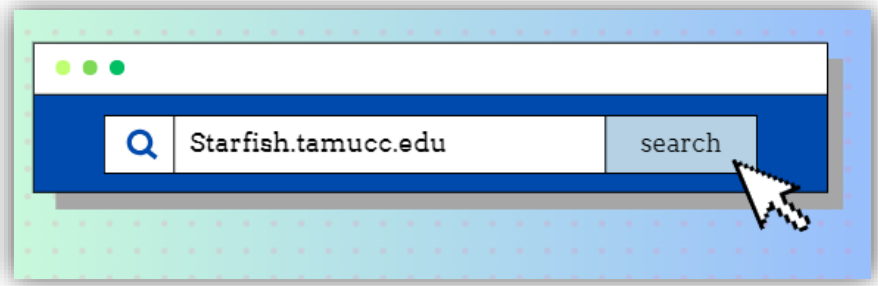
Follow-Up Intervention Efforts

1. Repeat Steps 1-4.
2. When performing follow-up Outreach know that now there are students in your list who will be receiving their first Outreach message and other students in your list you have already received your initial Outreach message.
3. Record Outreach Date Range

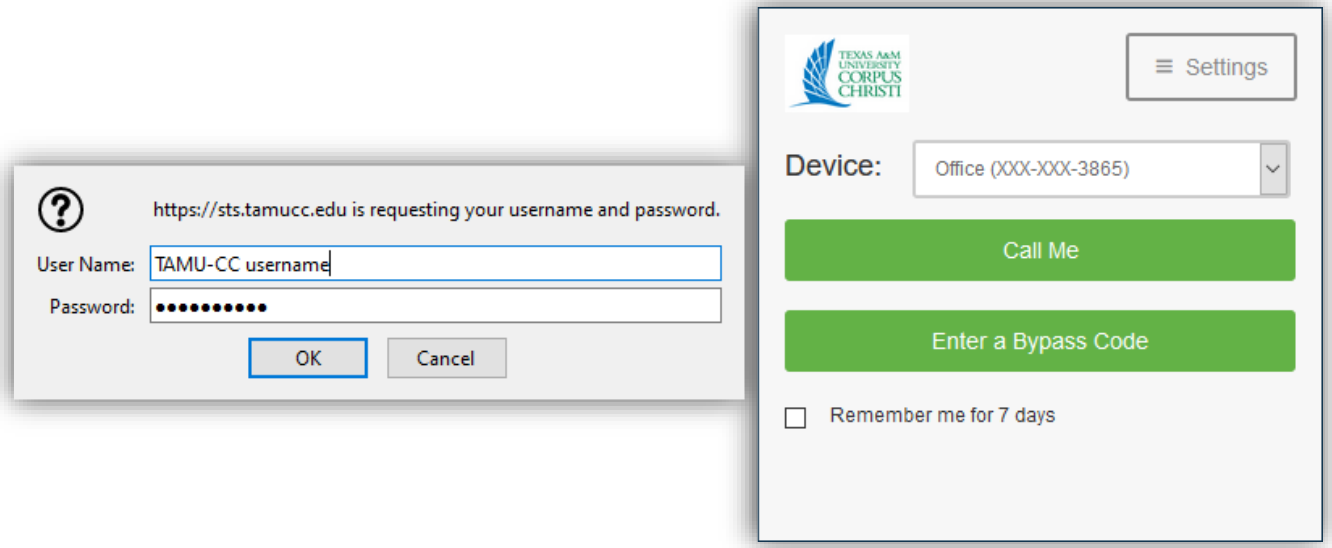
	<p>Positive Closure Reason Guide:</p> <p>In general, Flags can be cleared with “Positive” outcomes when direct communications/interventions with a flagged student have been established.</p> <p>This often includes meeting the following:</p> <ul style="list-style-type: none">• Inhibitor Identification: Any underlying inhibitor(s) preventing progress have been identified• Student Awareness: The student is aware of such inhibitors• Resolution Identification: A course of action to correct course progress concerns have been identified• Student Acknowledgement: The student has stated they are or will complete the course of action identified	
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Login to Starfish

Step 1. Search <https://starfish.tamucc.edu> using any browser:



Step 2. You may be prompted to complete the University's Duo authentication. Once completed, you will be routed into your Starfish Account.



Search for Flagged Students

1. Open the Starfish Navigation menu (hamburger button) located at the top left of the home page



2. In the Starfish Navigation Menu, select “Students”, then the “Tracking” tab.

The Tracking tab provides the following elements:

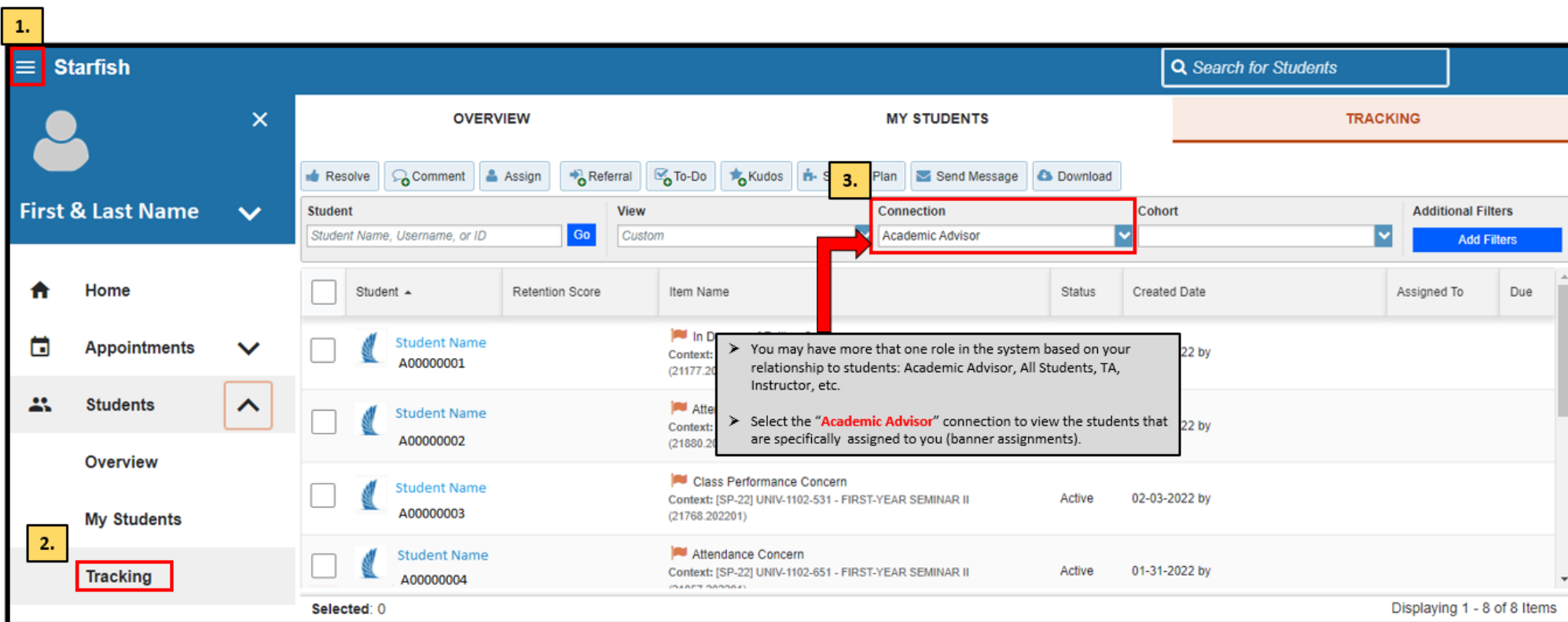
- Students with Tracking Items
- Tracking Item Name
- Item Status
- The person who raised the item and date it was created

A	B	C	D
Student	Item Name	Status	Created
<input type="checkbox"/> Student Name A00000001	Attendance Concern Context: [FALL-20] ENGL-1301-350 - COMPOSITION I (54986.202009)	Active	08-25-2020 by McGonagall, Minerva

3. Filter for the “Academic Advisor” Connection

- This will filter the tracking list to include items raised for your assigned student cohort (Primary Advisor – “*banner assignments*”).
- The next section will show how to filter the tracking list for “**active**” flags that are “**unassigned**” to other support personnel.

1.



Starfish

Search for Students

OVERVIEW MY STUDENTS TRACKING

Resolve Comment Assign Referral To-Do Kudos Plan Send Message Download

Student View Connection Cohort Additional Filters

Student Name, Username, or ID Go Custom Academic Advisor Add Filters

Student	Retention Score	Item Name	Status	Created Date	Assigned To	Due
<input type="checkbox"/> Student Name A00000001		In D Context: (21177.20				22 by
<input type="checkbox"/> Student Name A00000002		Atte Context: (21880.20				22 by
<input type="checkbox"/> Student Name A00000003		Class Performance Concern Context: [SP-22] UNIV-1102-531 - FIRST-YEAR SEMINAR II (21768.202201)	Active	02-03-2022 by		
<input type="checkbox"/> Student Name A00000004		Attendance Concern Context: [SP-22] UNIV-1102-651 - FIRST-YEAR SEMINAR II (21877.202201)	Active	01-31-2022 by		

Selected: 0

Displaying 1 - 8 of 8 Items


2.

3.

You may have more than one role in the system based on your relationship to students: Academic Advisor, All Students, TA, Instructor, etc.


Select the “Academic Advisor” connection to view the students that are specifically assigned to you (banner assignments).

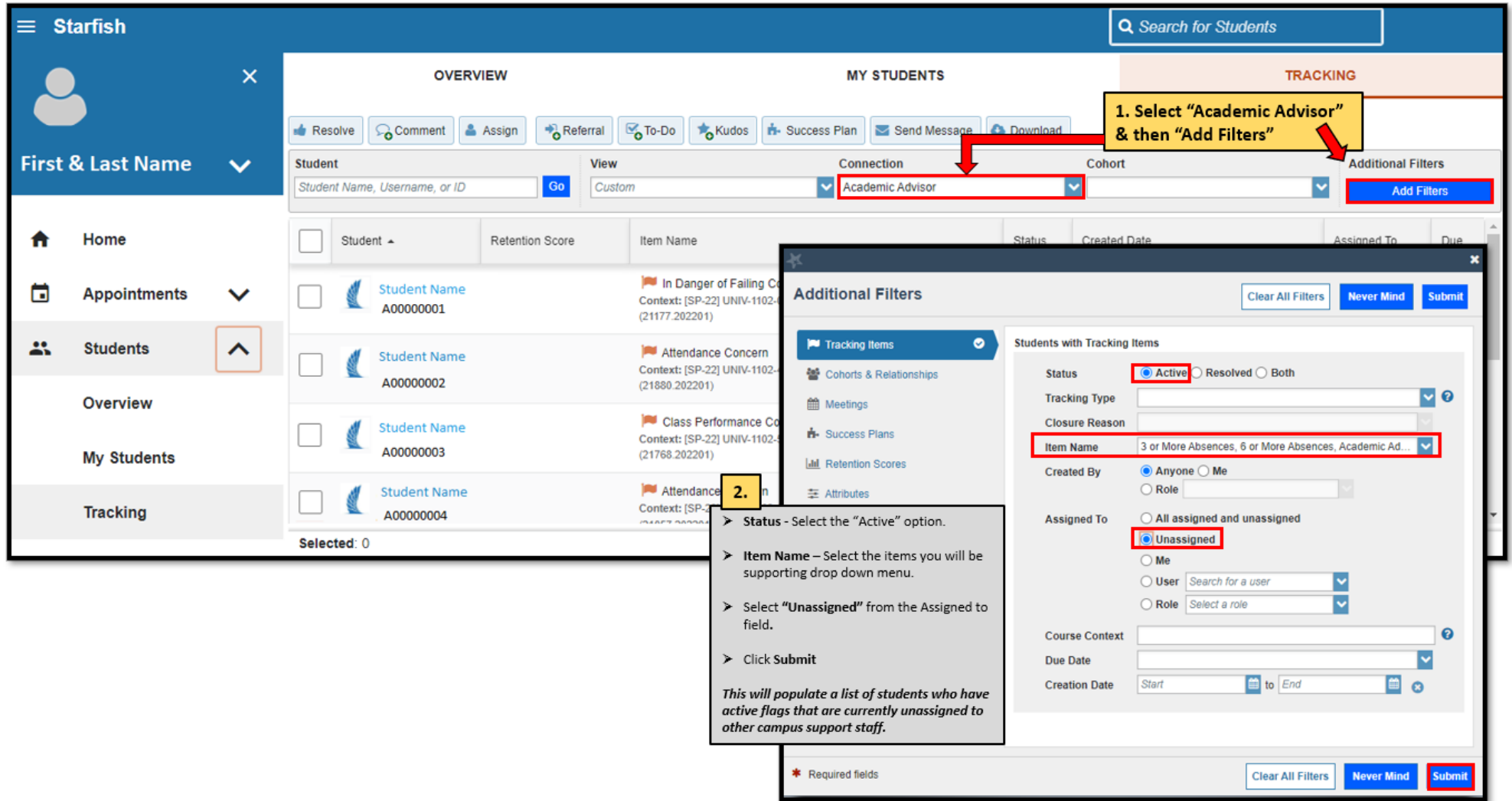
Filter by Unassigned Tracking Items

Academic Advisors provide support for the following Tracking Items: 

Item Type	Item Name
System Raised Flag	3 6 or More Absences
Flag	*Attendance Concern
Referral	Academic Advisor Referral
Flag	Consider Dropping the Course
Flag	*Class Performance Concern
Flag	In Danger of Failing Concern
Flag	Missing Assignment Concern
<i>* Included in Course Progress Report</i>	

Starfish allows users to filter items based on tracking item name and assignments, so that support staff can identify all active items that are currently unassigned to other campus staff.

- In the Academic Advisor Connection view, apply an additional filter to your tracking list, by clicking the “Add Filters” button.** 
- From the “Additional Filters” menu, select Tracking Items and filter by Item Name and Unassigned**



1. Select “Academic Advisor” & then “Add Filters”



2.

- > Status - Select the “Active” option.
- > Item Name – Select the items you will be supporting drop down menu.
- > Select “Unassigned” from the Assigned to field.
- > Click Submit

This will populate a list of students who have active flags that are currently unassigned to other campus support staff.

Providing Outreach to Multiple Students at Once

Once you have filtered your tracking list to include only the items assigned to yourself then you can send a **general message** to all these students at once. Please note, that if this is a follow-up outreach attempt there will be students in this list you have already received one outreach message from you and other students who will be receiving a message from you for this first time.

1. Click the "Select All" check box to select all students that meet your filtered criteria. You will notice at the bottom of the page the total number of students that have been selected.
2. Click the  button
3. Fill out the "Create Note" dialogue box
 - Treat this as an Outlook message (add Subject & Signature)
 - In the "Note" section type a general message that is general for multiple students with various flag types.
 - Click . This process will allow you to document your outreach in Starfish as well as email the students all at once.


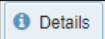
In instances where Flag outreach is done outside of the Starfish System (e.g., phone calls or emails through outlook), the process detailed below can be used to document your outreach attempts.

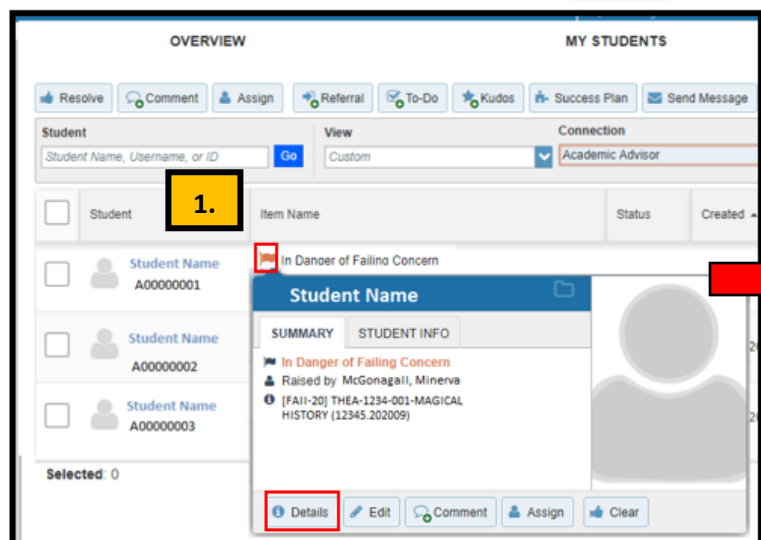
The screenshot shows the Starfish system interface. On the left is a navigation menu with 'Students' selected. The main area is titled 'TRACKING' and shows a list of students with flags. A 'Comment' button is highlighted with a red box and labeled '2.'. A 'Select All' checkbox is highlighted with a red box and labeled '1.'. A 'Create Note' dialog box is open, showing a subject 'Starfish Flag' and a note body. The dialog has 'Never Mind' and 'Submit' buttons. Below the note body are three checkboxes: 'Send copy of note to yourself' (unchecked), 'Send copy of note to student' (checked), and 'Send copy of comment to flag raiser' (unchecked). A red arrow points from the 'Send copy of note to student' checkbox to a text box that says 'Yes, this will ensure the student receives your message.' Another red arrow points from the 'Send copy of comment to flag raiser' checkbox to a text box that says 'No. The instructor will get notified when you clear the flag and close the loop.'

Student	Retention Score	Item Name
<input checked="" type="checkbox"/> Student Name A00000001		In Danger of Failing Concern Context: [SP-22] UNIV-1102-080 - FIRST-YEAR SE (21177.202201)
<input checked="" type="checkbox"/> Student Name A00000002		Attendance Concern Context: [SP-22] UNIV-1102-492 - FIRST-YEAR SE (21880.202201)
<input checked="" type="checkbox"/> Student Name A00000003		Class Performance Concern Context: [SP-22] UNIV-1102-531 - FIRST-YEAR SE (21768.202201)
<input checked="" type="checkbox"/> Student Name A00000004		Attendance Concern Context: [SP-22] UNIV-1102-651 - FIRST-YEAR SE (21457.202201)

Providing Personalized Outreach to a Unique Student

1. To find additional notes made by the instructor (if provided)




- Hover of the Flag Icon  and click 



OVERVIEW MY STUDENTS

Resolve Comment Assign Referral To-Do Kudos Success Plan Send Message

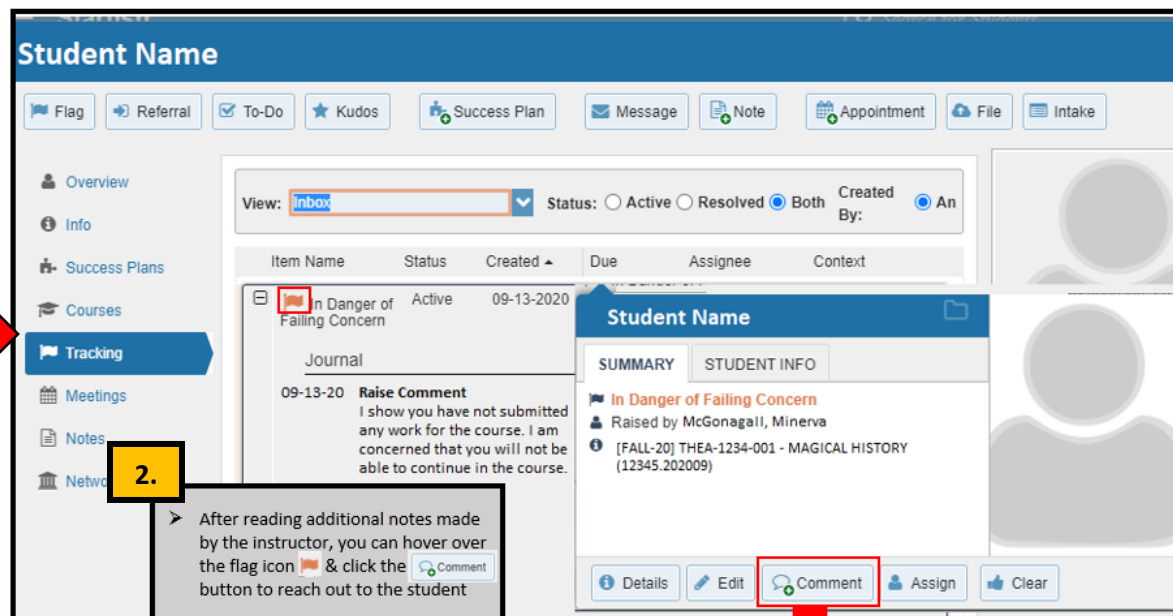
Student Student Name, Username, or ID Go View Custom Connection Academic Advisor

Student	Item Name	Status	Created
 Student Name A0000001	In Danger of Failing Concern		
 Student Name A0000002			
 Student Name A0000003			

Selected: 0

Details Edit Comment Assign Clear

2. This action opens the Tracking tab within the Student Folder, from which you can view additional comments made by the item raiser.




Student Name

Flag Referral To-Do Kudos Success Plan Message Note Appointment File Intake

Overview Info Success Plans Courses Meetings Notes Network

View: **Inbox** Status: Active Resolved Both Created By: An

Item Name	Status	Created	Due	Assignee	Context
 In Danger of Failing Concern	Active	09-13-2020			

Journal



09-13-20 **Raise Comment**
I show you have not submitted any work for the course. I am concerned that you will not be able to continue in the course.

Student Name


SUMMARY STUDENT INFO

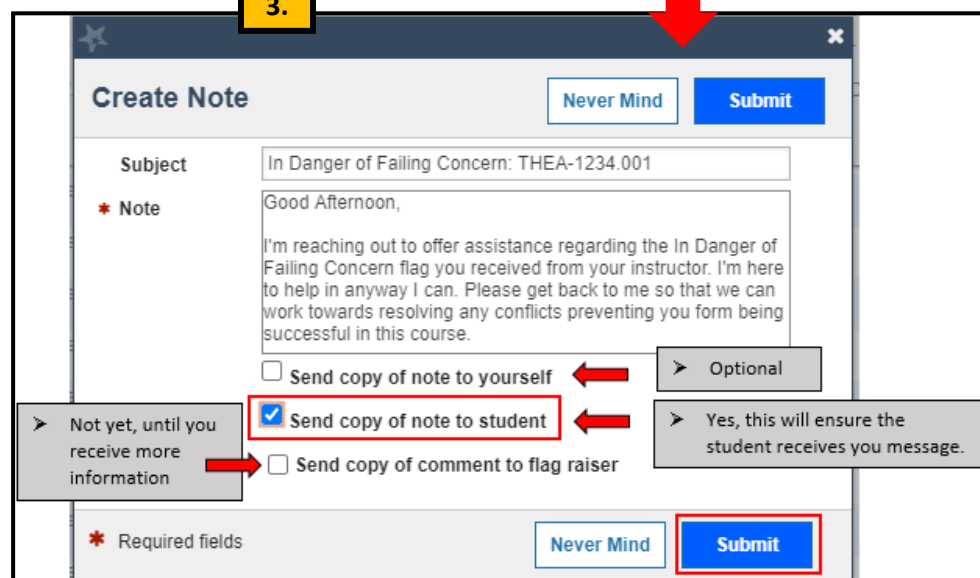
In Danger of Failing Concern
Raised by McGonagall, Minerva
[FALL-20] THEA-1234-001 - MAGICAL HISTORY (12345.202009)

Details Edit **Comment** Assign Clear

2. After reading additional notes made by the instructor, you can hover over the flag icon  & click the  button to reach out to the student

3. To Send a Notification to a student, select "Comment"; This action opens the "Create Note" dialogue box

- Treat this as an Outlook message (add Subject & Signature)
- In the "Note" section type a personalized message that addresses the item of concern
- Click . This process will allow you to document your outreach in Starfish as well as email the student all at once.



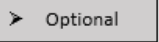
3.

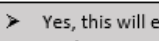
Create Note

Never Mind Submit

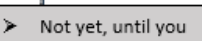
Subject In Danger of Failing Concern: THEA-1234.001

* Note Good Afternoon,
I'm reaching out to offer assistance regarding the In Danger of Failing Concern flag you received from your instructor. I'm here to help in anyway I can. Please get back to me so that we can work towards resolving any conflicts preventing you from being successful in this course.

Send copy of note to yourself  Optional

Send copy of note to student  Optional

Send copy of comment to flag raiser

Not yet, until you receive more information  Yes, this will ensure the student receives your message.

* Required fields

Never Mind Submit

Closure Reasons Guide (with Use Case)

Clearing flags generally occurs **AFTER** you have communicated (in person, over the phone, or through email) with the student and a resolution to the faculty member's concern has been identified and discussed. Further, activities the student will be performing moving forward have been confirmed with the student.

When closing Tracking Items in Starfish, we are presented with "Closure Reasons" to help categorize interventions as either being successfully addressed, not successfully addressed, or closed due to neutral conditions.

***** Note that the positive, negative, and neutral options listed below are broad categories that are designed to account for various reasons for clearing a flag...please select the option that best fits your reason for resolving the flag. *****

Positive -

The Concern was successfully addressed

- **Applicable when:** You have successfully worked with a student to identify resolutions to address faculty members concerns; involves identifying progress inhibitors, solutions, and the student is aware of activities to take moving forward to resolve concerns.
- **Example:** (Attendance Concern); Student stated they were having attendance issues because their car broke down. I spoke with the student, and they shared that they would begin using the bus for transportation and work with the faculty member to identify what options they have moving forward with the faculty member (missed assignments, make-up work, etc.)

Negative

The Concern was not successfully addressed (e.g., student asked to be left alone)

- **Applicable when:** You have gathered enough information from interacting with the student to know that you will not be able to support the student outside of the classroom
- **Example:** Student is not responsive towards attempts at providing interventions – Student states, "I don't care, leave me alone and/or stop calling me."

Neutral

I don't have enough information (No Engagement from Student)

- **Select this reason if:** You have reached out to a student 3 or more times to provide support regarding a flag and have been unsuccessful in engaging with the student. The student has not responded to your outreach, and at this time there is not enough information to clear with a positive or negative reason.

Neutral

The concern is no longer relevant (e.g., withdrew)

- **Select this reason if:** You find the concern noted is no longer relevant (e.g., Student has dropped the course or has withdrawn from the University).

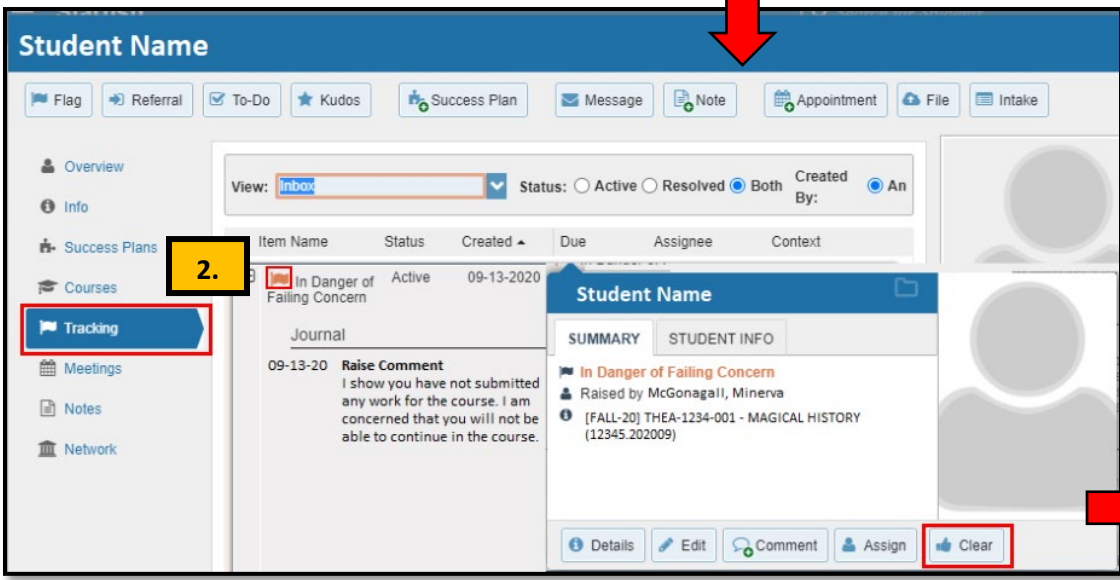
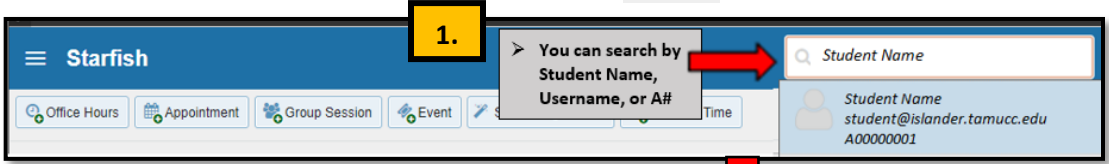
Neutral

The Flag was raised by mistake

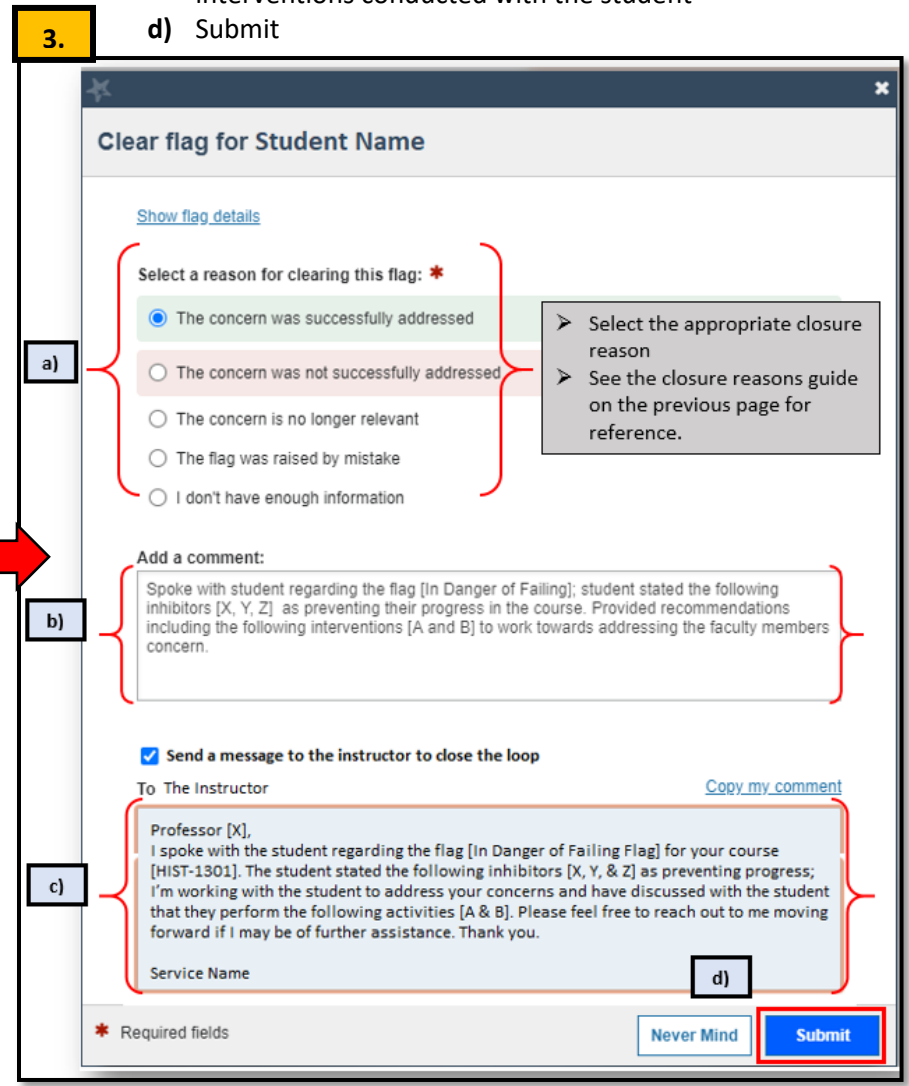
- **Select this reason if:** You find that the concern was created by mistake (e.g., Faculty member stated the tracking item was raised in error)

Resolving or Clearing a Single Flag

1. **Search for the student whose items you are wanting to clear.**
2. **Navigate to the Tracking Tab within the student's folder**
 - Hover of the Flag Icon and click



3. **Fill out the "Clear Flag" dialogue box:**
 - a) Select the "Reason" (Positive, Negative, or Neutral),
 - b) Add a Comment (This is where you place your outcomes to document in Starfish)
 - c) **"Close the Loop"** send a message to the faculty member stating your progress and interventions conducted with the student
 - d) Submit



Resolving or Clearing Multiple Flags at Once

There are times when a unique student has the same type of flag for various courses. If you have communicated with a student and come to a resolution, you can bulk clear all the similar type flags for that one student using the same closure reason.

1. Search the student by Name, Username or ID and click **Go**
2. Click the "Select All" check box to select all the items that meet your criteria.
 - Or, check off one by one the items you wish to clear for that student.
 - You will notice at the bottom of the page the total number of items that have been selected.
3. Click the **Resolve** button
4. Fill out the "Create Note" dialogue box

The screenshot shows the Starfish interface. On the left is a navigation menu with 'Home', 'Appointments', 'Students', 'Overview', 'My Students', and 'Tracking'. The main area is titled 'OVERVIEW' and 'MY STUDENTS'. At the top, there's a search bar and a 'Resolve' button (labeled 3.). Below that is a table of flags for a student. The first three rows are checked, and the 'Selected: 3' indicator is at the bottom. A red box highlights the search field (labeled 1.) and the 'Resolve' button (labeled 2.). A red arrow points from the 'Resolve' button to the dialog box on the right.

The dialog box is titled 'Clear flag for Student Name'. It has a 'Show flag details' link. Under 'Select a reason for clearing this flag: *', there are five radio button options: 'The concern was successfully addressed' (selected), 'The concern was not successfully addressed', 'The concern is no longer relevant', 'The flag was raised by mistake', and 'I don't have enough information'. A callout box points to these options with the text: 'Select the appropriate closure reason' and 'See the closure reasons guide on the previous page for reference.' Below this is a text area for 'Add a comment:' containing a sample comment. A checkbox 'Send a message to the instructor to close the loop' is checked. Below it is a 'To The Instructor' field with a 'Copy my comment' link. A text area contains a sample message to the instructor. A 'Service Name' field is at the bottom. At the bottom right are 'Never Mind' and 'Submit' buttons. A red box highlights the 'Submit' button. Labels 'a)', 'b)', and 'c)' are placed next to the reason selection, comment, and message fields respectively. A label 'd)' is placed next to the 'Service Name' field.