

## TRACKING ITEM MANAGEMENT PROCESS

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### 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.



# Tracking Item Management Process (General Overview)

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## Intervention Outline (First Effort)

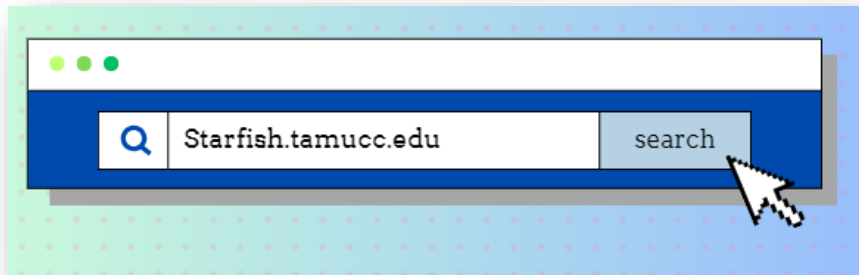
1. [Login to Starfish](#)
2. [Navigate to your Active Tracking Item List & Filter for your Coach \(All TAMUCC Students\) Connection](#)
  - Create Additional Filters for - Specific Tracking Items that are Assigned to "You"
  - Sort the Tracking List by Student (This is your outreach/call list)
3. Before Reaching out to the student:
  - [Review Flag Details and Student Information \(Classification, College, FERPA etc.\) from the student's Starfish Folder.](#)
4. [Document Outreach Attempts \(Without Clearing the Flag\)](#)
5. Clear (Resolve) Flags & Close the Loop based on Interaction/Lack of Interaction with Student
  - [Resolve a Single Flag](#)
  - [Resolve Multiple Flags at Once - Without Sending Multiple Message to the Flag Raiser](#)
  - **Best Practice** – Clear All Associated Flags but Send the Close the Loop Summary to the Instructor only once.

## Follow-Up Intervention Efforts

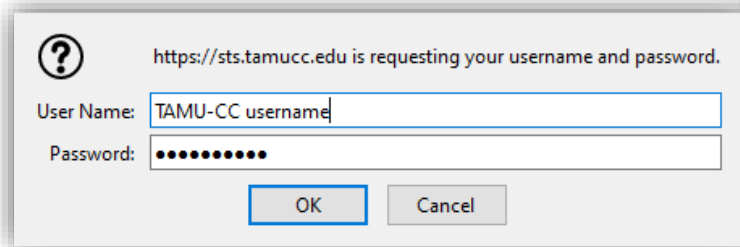
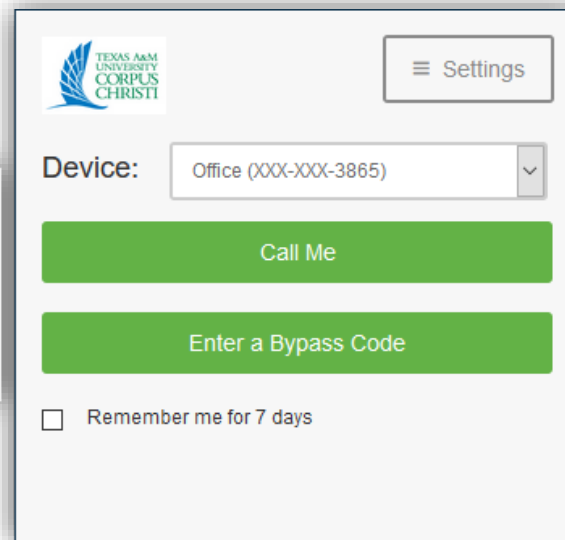
1. Repeat Steps 1-4.
2. When performing follow-up Outreach know that now there are students in your list who will be receiving their first Outreach message and other students in your list you have already received your initial Outreach message.
3. Record Outreach Date Range

## 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.

A screenshot of a system security dialog box. It has a question mark icon in a circle on the left. The text reads: 'https://sts.tamucc.edu is requesting your username and password.' Below this, there are two input fields: 'User Name:' with the text 'TAMU-CC username' and 'Password:' with a series of black dots. At the bottom, there are two buttons: 'OK' and 'Cancel'.A screenshot of the Duo authentication interface. At the top left is the Texas A&M University Corpus Christi logo. At the top right is a 'Settings' button with a hamburger menu icon. Below the logo is the text 'Device:' followed by a dropdown menu showing 'Office (XXX-XXX-3865)'. There are two large green buttons: 'Call Me' and 'Enter a Bypass Code'. At the bottom, there is a checkbox labeled 'Remember me for 7 days'.

## Search for Flagged Students Assigned to You

1. Open the Starfish Navigation menu (hamburger button) located at the top left of the home page ->
2. From Starfish Navigation Menu, select “Students”, then the “Tracking” tab.
3. Filter for the “Coach (All TAMUCC Students)” Connection
4. Select “Add Filters” button on the right side of the header menu ->
5. Apply Additional Filters to Identify Active Flags Assigned to YOU



Add Filters



We also recommend clicking on the student column to sort the Flag list by student. This way you may see if a student has multiple active flags.

The screenshot displays the Starfish interface with the following elements:

- Navigation Menu (1.):** Located at the top left, containing Home, Appointments, Students, Overview, My Students, My Success Network, and Upcoming. The "Tracking" option under "My Students" is highlighted with a red box (2.).
- Header:** Includes the Starfish logo, a search bar "Search for Students", and tabs for OVERVIEW, MY STUDENTS, TRACKING (selected), ZOOM IN, ATTENDANCE, and PROGRESS SURVEYS.
- Filtering (3. and 4.):** The "Connection" dropdown is set to "Coach (All TAMUCC Students)". The "Additional Filters" button is highlighted with a red box (4.).
- Table:** A table with columns for Student, Retention Score, and Item Name. It lists several students with their IDs and associated flags like "Class Performance Co" and "3 or More Absences".
- Additional Filters Dialog (5.):** A modal window with the following settings:
  - Tracking Items:  Tracking Items
  - Status:  Active
  - Assigned To:  Me
  - Submit:

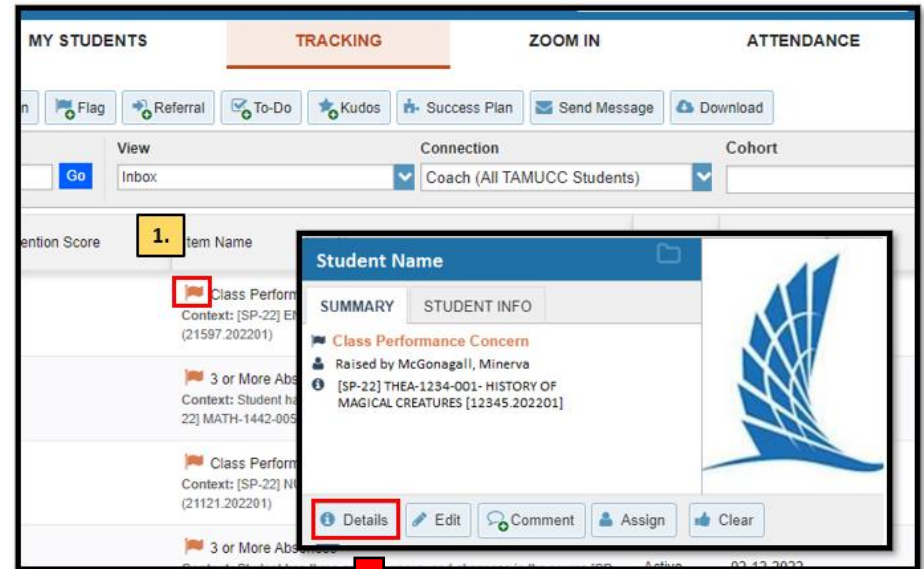
## Review Tracking Item Notes Made by Item Raiser

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

- Hover of the Flag Icon  and click 

### 2. This action opens the Tracking tab within the Student Folder, from which you can view:

- Additional comments made by the item raiser (If provided).
- Additional Active Items for the Students and the associated comments by the item raiser (if provided).
- Any Outreach that has already been done for the Item(s) by you or other campus support staff.



MY STUDENTS TRACKING ZOOM IN ATTENDANCE

View: Inbox Connection: Coach (All TAMUCC Students) Cohort:

1. Item Name

Class Performance Concern  
Context: [SP-22] ENGL-0099-001 - NON-COURSE DEVELOPMENTAL (21585.202201)

3 or More Absences  
Context: Student has 3 or more absences in [SP-22] MATH-1442-003 - STATISTICS FOR LIFE (20551.202201)

Class Performance Concern  
Context: [SP-22] ENGL-0099-001 - NON-COURSE DEVELOPMENTAL (21121.202201)

3 or More Absences  
Context: Student has 3 or more absences in [SP-22] ENGL-0099-001 - NON-COURSE DEVELOPMENTAL (21585.202201)

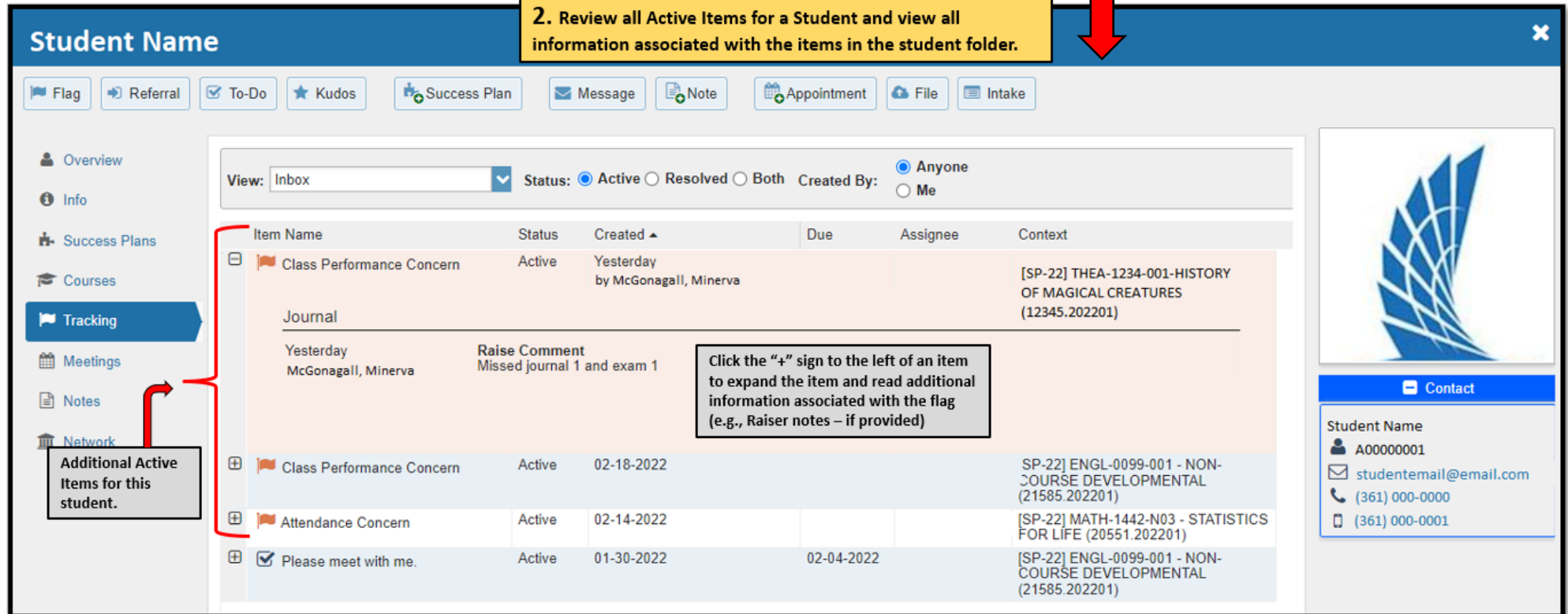
Student Name

SUMMARY STUDENT INFO

Class Performance Concern  
Raised by McGonagall, Minerva  
[SP-22] THEA-1234-001- HISTORY OF MAGICAL CREATURES [12345.202201]

Details Edit Comment Assign Clear

### 2. Review all Active Items for a Student and view all information associated with the items in the student folder.



Student Name

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

Overview Info Success Plans Courses Tracking Meetings Notes Network

View: Inbox Status:  Active  Resolved  Both Created By:  Anyone  Me

Item Name	Status	Created	Due	Assignee	Context
Class Performance Concern	Active	Yesterday by McGonagall, Minerva			[SP-22] THEA-1234-001-HISTORY OF MAGICAL CREATURES (12345.202201)
Journal					
Yesterday McGonagall, Minerva	Raise Comment Missed journal 1 and exam 1				
Class Performance Concern	Active	02-18-2022			SP-22] ENGL-0099-001 - NON-COURSE DEVELOPMENTAL (21585.202201)
Attendance Concern	Active	02-14-2022			[SP-22] MATH-1442-N03 - STATISTICS FOR LIFE (20551.202201)
Please meet with me.	Active	01-30-2022	02-04-2022		[SP-22] ENGL-0099-001 - NON-COURSE DEVELOPMENTAL (21585.202201)


Click the "+" sign to the left of an item to expand the item and read additional information associated with the flag (e.g., Raiser notes – if provided)

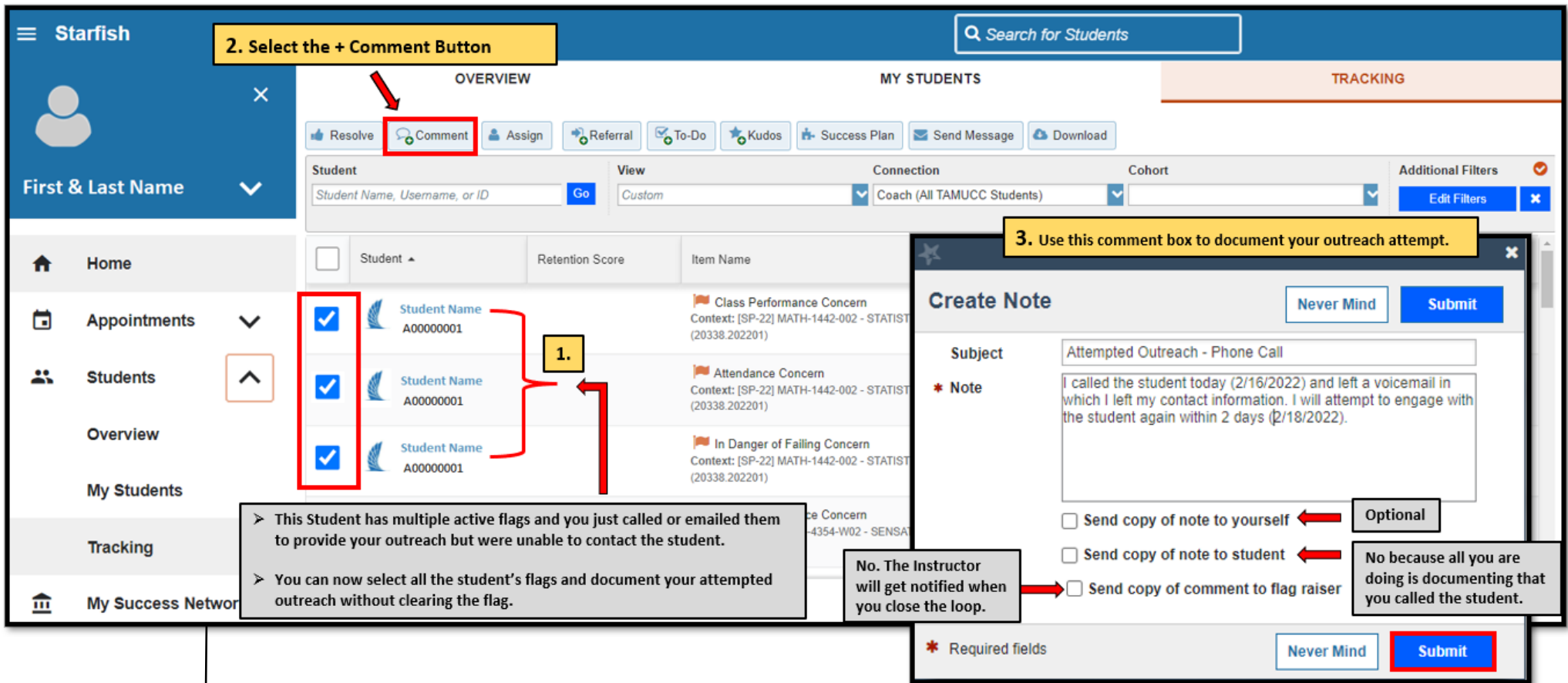
Additional Active Items for this student.

Contact

Student Name  
A00000001  
studentemail@email.com  
(361) 000-0000  
(361) 000-0001

## How to Document Outreach Attempts (Without Clearing a Flag)

1. **From your Filtered Tracking List**
  - use the checkbox next to each student's name to select the item(s) for which you would like to Document Outreach
2. **Select the "Add a Comment" Button from the Action Bar at the top of the page.** 
3. **Fill out the "Create Note" box to Document your Outreach Attempt(s).**



**2. Select the + Comment Button**

**3. Use this comment box to document your outreach attempt.**

**1.**

This Student has multiple active flags and you just called or emailed them to provide your outreach but were unable to contact the student.

You can now select all the student's flags and document your attempted outreach without clearing the flag.

No. The Instructor will get notified when you close the loop.

Optional

No because all you are doing is documenting that you called the student.

\* Required fields

Never Mind Submit

Alternatively, the process detailed above can also be used to provide outreach for multiple flags at once. You would simply select the option to, "**Send copy of note to student**" so that your outreach attempt is received by the student.

\*\*\*\*Please note that the message will be sent **multiple times** to the same student if they have **multiple items** in the system. \*\*\*

## Closure Reasons Guide

Clearing flags generally occurs **AFTER** you have communicated (in person, over the phone, or through email) with the student and a resolution to the initial 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).

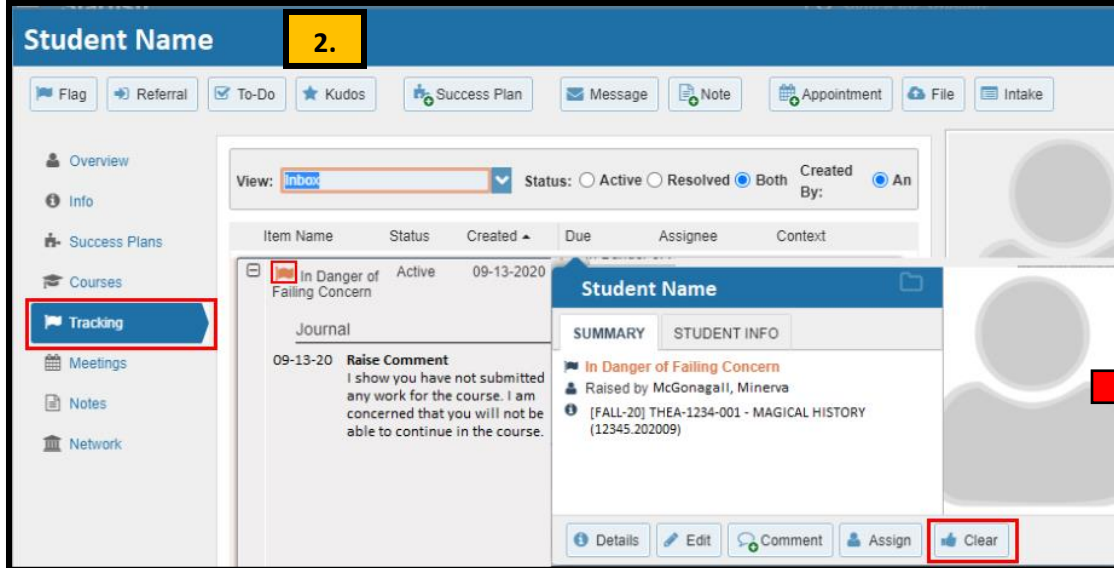
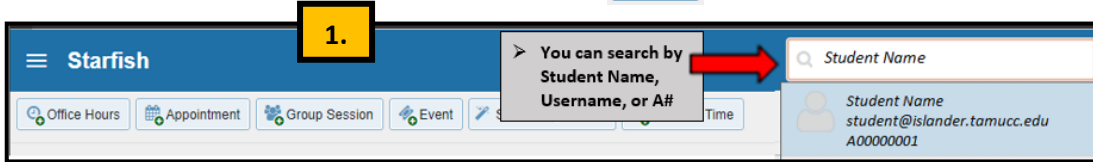
### Neutral

#### 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 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

Starfish OVERVIEW MY STUDENTS

Search for Students

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

First & Last Name

Student Student View Connection

Student Name, Username, or ID Custom Coach (All TAMUCC Students)

Student	Retention Score	Item Name	Status
<input checked="" type="checkbox"/> Student Name A0000001		Class Performance Concern Context: [SP-22] MATH-1442-002 - STATISTICS FOR LIFE (20338.202201)	Active
<input checked="" type="checkbox"/> Student Name A0000001		Attendance Concern Context: [SP-22] MATH-1442-002 - STATISTICS FOR LIFE (20338.202201)	Active
<input checked="" type="checkbox"/> Student Name A0000001		In Danger of Failing Concern Context: [SP-22] MATH-1442-002 - STATISTICS FOR LIFE (20338.202201)	Active
<input type="checkbox"/> Student Name A0000002		Class Performance Concern Context: [SP-22] PSYC-4354-W02 - SENSATION AND PERCEPTION (22119.202201)	Active

Selected: 3

4. Clear flag for Student Name

Show flag details

Select a reason for clearing this flag: \*

The concern was successfully addressed

The concern was not successfully addressed

The concern is no longer relevant

The flag was raised by mistake

I don't have enough information

Add a comment:

Spoke with student regarding the flag [In Danger of Failing]; student stated the following inhibitors [X, Y, Z] as preventing their progress in the course. Provided recommendations including the following interventions [A and B] to work towards addressing the faculty members concern.

Send a message to the instructor to close the loop

To The Instructor Copy my comment

Professor [X],  
I spoke with the student regarding the flag [In Danger of Failing Flag] for your course [HIST-1301]. The student stated the following inhibitors [X, Y, & Z] as preventing progress; I'm working with the student to address your concerns and have discussed with the student that they perform the following activities [A & B]. Please feel free to reach out to me moving forward if I may be of further assistance. Thank you.

Service Name

\* Required fields

Never Mind Submit

Please note that the process detailed above is useful in helping address students who have multiple active flags. However, **if the flags that are selected, are raised by the same instructor for the same course, then the flag raiser (faculty) will receive multiple close the loop messages (one for every item selected).**

**[Click here for a workaround to avoid sending the flag raiser multiple close the loop messages.](#)**

# Resolving or Clearing Multiple Flags (Without Sending Faculty Multiple Messages)

## Find all Associate Flags for a Student for a single course

- Clear one Flag **with** a Close the Loop Summary
- Then clear the remaining flags for that student **without** a Close the Loop Summary

Following this process can be useful to avoid inundating faculty who have raised multiple flags for the same student/course. For students who have multiple flags but for different course(s) then you would provide a Close the Loop Message to each instructor.

### Clear flag for Student Name

[Show flag details](#)

Select a reason for clearing this flag: \*

- The concern was successfully addressed
- The concern was not successfully addressed
- The concern is no longer relevant
- The flag was raised by mistake
- I don't have enough information

**➤ Select the appropriate closure reason.  
➤ See the closure reason guide provide in the previous page(s) for reference.**

Add a comment:

I spoke with the student regarding the flags raised for their (THEA-1234) course. The student stated the following inhibitors [X,Y, & Z] as preventing progress in their course; Provided recommendations including [A & B] to work towards addressing the faculty member's concern.

**For a student who has multiple flags for the same course you can Close the Loop and provide a summary in one of the flags and clear the others without checking the, "Send message to the instructor box"**

Send a message to the instructor to close the loop

To Instructor [Copy my comment](#)

Professor [X],  
I spoke with the student regarding the flags you raised for your (THEA-1234) course. The student stated the following inhibitors [X,Y, & Z] as preventing progress; i'm working with the student to address your concerns and have discussed with the student that perform the following activities [A & B]. Thank you.

Service Name

\* Required fields

**Starfish**

First & Last Name

**OVERVIEW**

Resolve  Comment  Assign  Referral  To-Do  Kudos  Success Plan

Student: Student Name, Username, or ID  View: Custom

Student	Retention Score	Item Name	Status	Created Date	Assigned To	Due
<input checked="" type="checkbox"/> Student Name A00000001		Class Performance Concern Context: [SP-22] MATH-1442-002 - STATISTICS FOR LIFE (20338.202201)	Active	02-22-2022	McGonagall, Minerva	
<input checked="" type="checkbox"/> Student Name A00000001		Attendance Concern Context: [SP-22] MATH-1442-002 - STATISTICS FOR LIFE (20338.202201)	Active	02-22-2022	McGonagall, Minerva	
<input checked="" type="checkbox"/> Student Name A00000001		In Danger of Failing Concern Context: [SP-22] MATH-1442-002 - STATISTICS FOR LIFE (20338.202201)	Active	02-22-2022	McGonagall, Minerva	
<input type="checkbox"/> Student Name A00000002		Class Performance Concern Context: [SP-22] PSYC-4354-W02 - SENSATION AND PERCEPTION (22119.202201)	Active	Yesterday	McGonagall, Minerva	

Selected: 3

Displaying 1 - 25 of 2544 Items

**Clear this flag and Provide a Close the Loop Summary.**

**Clear these flags but do not check the box needed to Close the Loop with the flag raiser.**

**Send a message to the instructor to close the loop**