



Starfish | Student Success Platform

SUNY NEW PALTZ

Managing Tracking Items

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Welcome to Starfish[®] at SUNY New Paltz!

Starfish is an easy-to-use platform that gives you the opportunity to connect on another level to help improve student success and persistence.

Everyone has a role in student success at SUNY New Paltz!

Helping our students be successful is a team effort. Depending on your role within the institution, however, you will likely have very specific priorities and goals in mind when you think about how best to support your students. Starfish works best when all members of our institution work together to address students' specific needs.

Getting started is easy!

Login Directions:

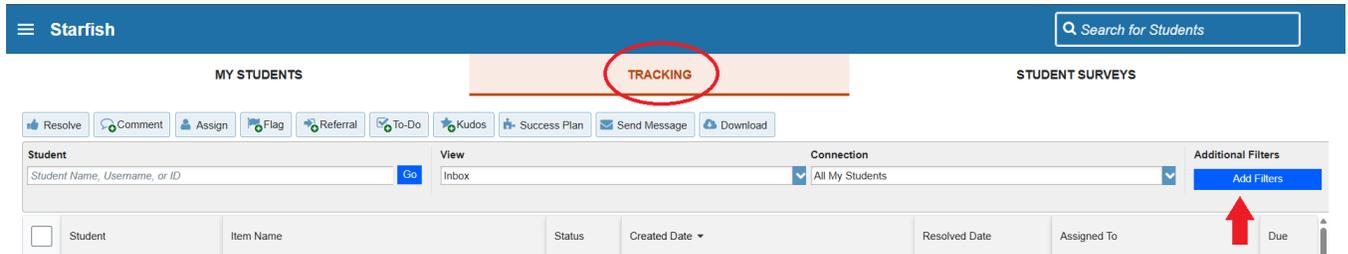
1. Sign in to my.newpaltz.edu
2. Click the "Starfish" link under "Resources" (left-hand column)

Starfish will automatically display all your assigned advisees and students enrolled in your courses. You can raise alerts (flags, kudos, & referrals) about students, review alerts that have been raised about your students, and provide additional information.

Filtering Open Tracking Items

1. Log in to Starfish
2. Click on the **menu**  button, then select the **Students** option
3. Click on the **Tracking** tab

If any of your students have an open flag, they will appear here.

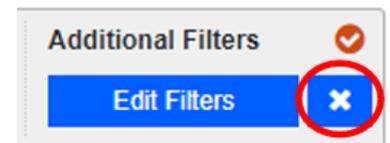


Be sure to change the “**Connection**” drop down and select the specific role you wish to search from. Depending on what roles you have in Starfish, “**All My Students**” may include students in which you do not have a 1:1 connection with.



4. To filter for the tracking item(s) you are looking for, click the **Add Filters** button on the right side of the header bar, above your list of students.

NOTE: if you already have filters on your list (indicated by ‘**Additional Filters**’), make sure you clear them by clicking the **x** button



- From the **Additional Filters** menu, make sure you are on the **Tracking Items** tab

The screenshot shows the 'Additional Filters' dialog box for 'Students with Tracking Items'. The 'Tracking Items' tab is selected in the left sidebar. The main area contains the following filter options:

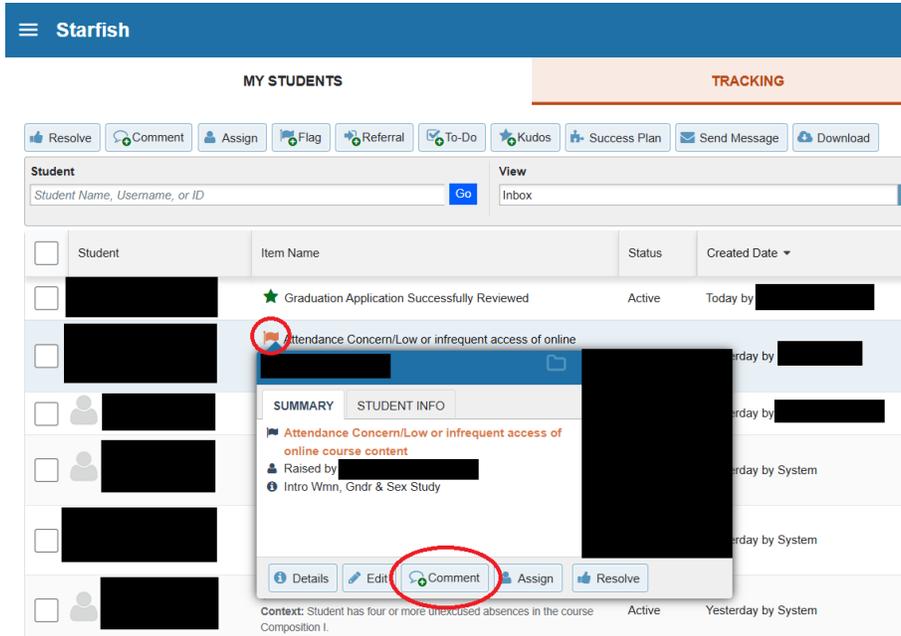
- Status:** Radio buttons for Active (includes Needs Review), Needs Review, Resolved, and All.
- Tracking Type:** A dropdown menu.
- Closure Reason:** A dropdown menu.
- Item Name:** A dropdown menu with the selected value 'Never Attended or Engaged in any course work'.
- Created By:** Radio buttons for Anyone, Me, and Role (with a dropdown).
- Assigned To:** Radio buttons for All assigned and unassigned, Unassigned, Me, User (with a search dropdown), and Role (with a dropdown).
- Course Context:** A text input field.
- Due Date:** A dropdown menu.
- Creation Date:** A date range selector with 'Start' and 'End' fields and a calendar icon.

Buttons for 'Clear All Filters', 'Never Mind', and 'Submit' are located at the top and bottom of the dialog box. A red asterisk and the text '* Required fields' are visible at the bottom left.

- Select **Active** to filter for open flags
- Under **Item Name**, select the tracking item you want to filter by. You can select multiple tracking items at a time.
Depending on if you manage other types of tracking items, you can also narrow the search using the **Tracking Type** (flag, kudo, to-do, referral).
- Click **Submit**

Comments on Tracking Items

1. Log in to Starfish
2. Click on the **menu**  button, then select the **Students** option
3. Click on the **Tracking** tab
4. From the **Tracking** tab, find a student in your list with a tracking item and hover your mouse over the **tracking item icon**

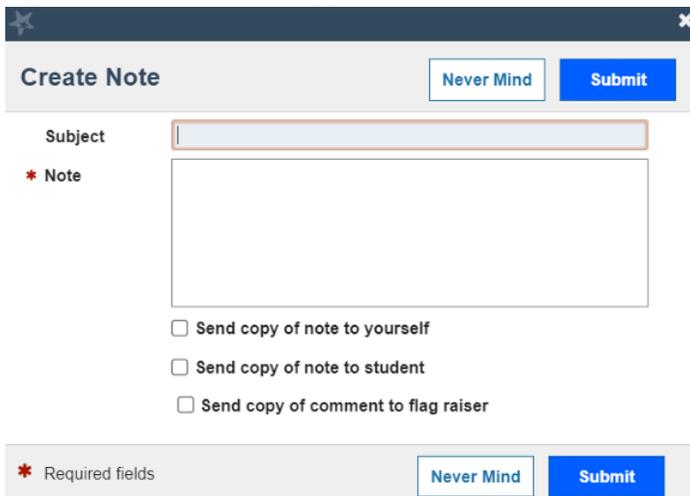


The screenshot shows the Starfish interface with the 'TRACKING' tab selected. A table of tracking items is visible. One item, 'Attendance Concern/Low or infrequent access of online', is highlighted. A modal window is open over this item, showing a 'COMMENT' button circled in red. The modal also shows a 'SUMMARY' tab with details about the issue and a 'Context' section at the bottom.

5. Click **Comment**
6. Add a **Subject** for your comment. Add a **Comment**.

From here, you can select whether you want a copy of your comment to be sent to yourself (via email), to the student (via email), or to the flag raiser (via email).

If you do not want a copy of the comment sent to anyone, simply do not check any of the boxes.

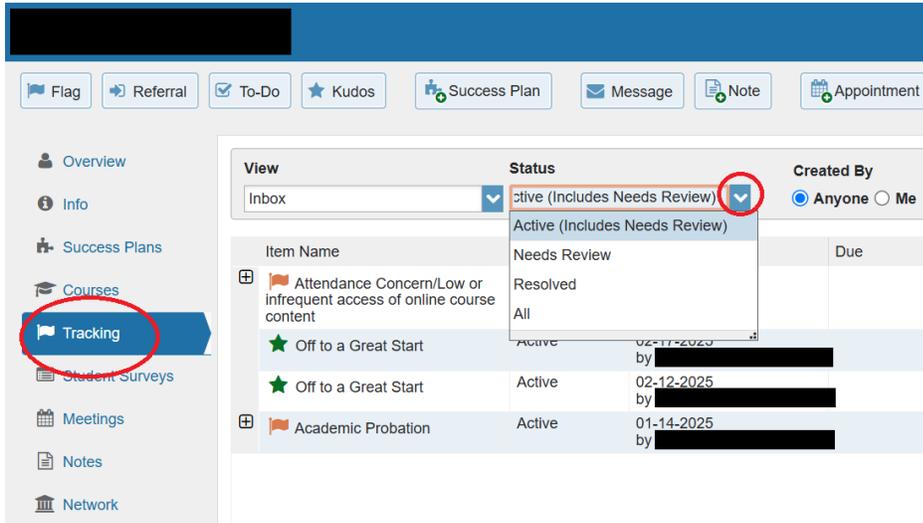


The screenshot shows the 'Create Note' form in Starfish. The form has a 'Subject' field and a larger 'Note' field. Below the 'Note' field are three checkboxes: 'Send copy of note to yourself', 'Send copy of note to student', and 'Send copy of comment to flag raiser'. At the bottom, there are 'Never Mind' and 'Submit' buttons.

7. Click **Submit**

To review comments on a flag:

1. From the **Tracking** tab, find a student in your list and click on their name. This will bring you to the **Student Profile**.
2. Click the **Tracking** tab
3. To view **Active** tracking items, change the **Status** drop-down to **Active (Includes Needs Review)**



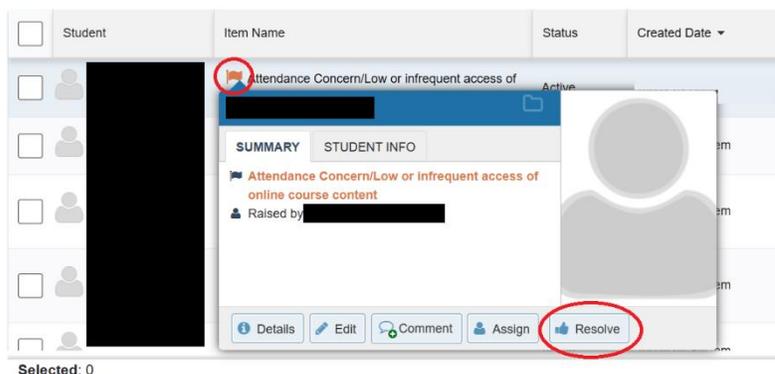
4. To view details and comments on the tracking item, click the **plus sign**  next to the tracking item to reveal the details.

Closing Tracking Items

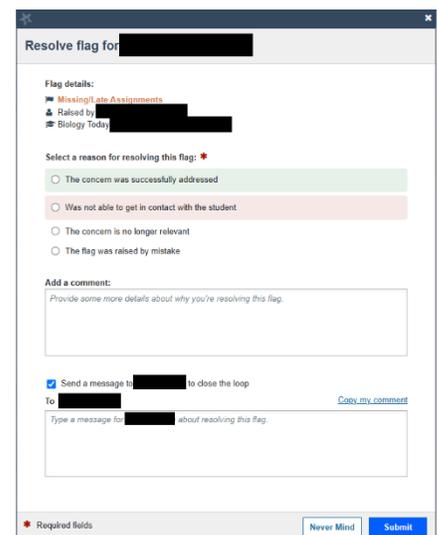
Based on the specific tracking item and your department's outreach protocol, you can close a tracking item for a variety of reasons. Typically for Flag or Referral tracking items, you will close the tracking item if you have (1) successfully connected with the student to address the concern or (2) conducted the appropriate outreach and were not able to connect.

Follow the process to clear the tracking item:

1. Log in to Starfish
2. Click on the **menu**  button, then select the **Students** option
3. Click on the **Tracking** tab
4. Identify the Tracking Item you wish to close
 - a. Refer to the **Filtering OPEN Tracking Items directions**
 - b. You can also find the Tracking Item directly from the **Tracking** tab
5. There are a few ways to go about closing a Tracking Item:
 - a. Clear a tracking item from the **Tracking** tab page
 - i. From the **Tracking** tab, hover over the **Icon** of the Tracking Item you would like to manage and a dialog box will appear
 - ii. Click **Resolve**



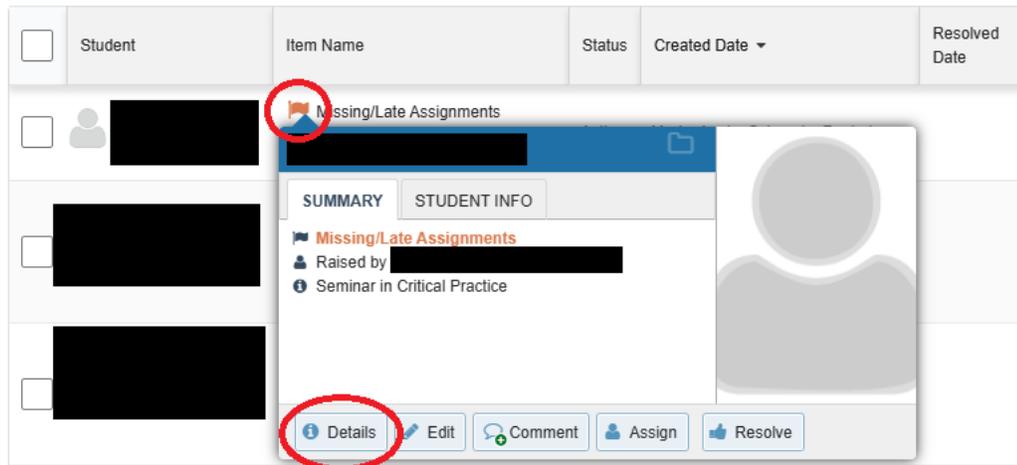
- iii. A dialog box will appear. You will be prompted to select a reason for clearing the Tracking Item and enter a comment about why you are clearing it. Depending on the Tracking Item, different closure reasons will appear. When clearing a flag, it is appropriate to “Close the Loop” with the individual who raised the tracking item. Closing the loop will send an email to the Tracking Item Raiser of whatever you detail in that box. You can copy your comment from the Comment box by clicking “Copy my comment” to save some time, or craft a personalized message to the Raiser.



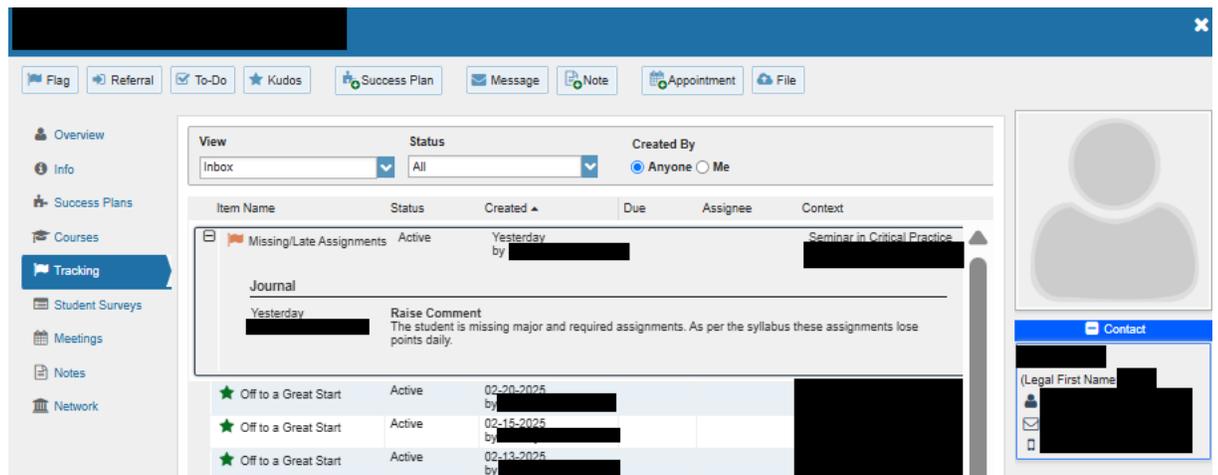
The dialog box is titled 'Resolve flag for [redacted]'. It contains the following sections:

- Flag details:** Missing late Assignments, Raised by [redacted], Biology Today.
- Select a reason for resolving this flag:** Four radio button options: 'The concern was successfully addressed' (selected), 'Was not able to get in contact with the student', 'The concern is no longer relevant', and 'The flag was raised by mistake'.
- Add a comment:** A text box with the placeholder 'Provide some more details about why you're resolving this flag.'
- Send a message to:** A checked checkbox 'Send a message to [redacted] to close the loop'. Below it is a 'To' field with [redacted] and a 'Copy my comment' link.
- Type a message to:** A text box with the placeholder 'Type a message to [redacted] about resolving this flag.'
- Buttons:** 'Never Mind' and 'Submit'.

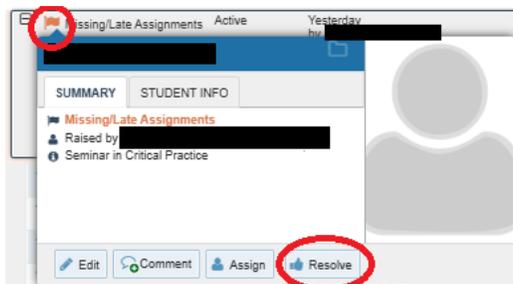
- iv. Click **Submit**
- b. Clear a tracking item from the **Student Profile**
 - i. From the **Tracking** tab, hover over the tracking item **Icon** and select **Details**



This will take you directly to the Student Profile > Tracking > Tracking Item details. You can see all current details under the specific Tracking Item you selected.



- ii. Hover over the **Icon** of the Tracking Item you would like to manage and a dialog box will appear



- iii. Click **Resolve**

iv. A dialog box will appear. You will be prompted to select a reason for clearing the Tracking Item and enter a comment about why you are clearing it. Depending on the Tracking Item, different closure reasons will appear. When clearing a flag, it is appropriate to “Close the Loop” with the individual who raised the tracking item. Closing the loop will send an email to the Tracking Item Raiser of whatever you detail in that box. You can copy your comment from the Comment box by clicking “Copy my comment” to save some time, or craft a personalized message to the Raiser.

v. Click **Submit**

6. This will “resolve” the flag and it will no longer appear as an active Tracking Item for you, the student, or any other service providers who work with the student.
7. To review flags that you have cleared, simply return to the same screen and sort for “Active and Resolved” items in the View sorting bar

The screenshot shows a web interface titled "Resolve flag for [redacted]". Under "Flag details:", it lists "Missing/late Assignments" and "Raised by [redacted] Biology Today". The "Select a reason for resolving this flag:" section has four radio button options: "The concern was successfully addressed" (highlighted in green), "Was not able to get in contact with the student" (highlighted in red), "The concern is no longer relevant", and "The flag was raised by mistake". Below is an "Add a comment:" field with the placeholder text "Provide some more details about why you're resolving this flag." There is a checked checkbox "Send a message to [redacted] to close the loop" and a "To [redacted]" field with a "Copy my comment" link. A "Type a message for [redacted] about resolving this flag" field is also present. At the bottom, there is a "Required fields" indicator and "Never Mind" and "Submit" buttons.