




# UND Starfish

## User's Manual

Instructors, Advisors, Staff  
Summer 2023



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## SECTION 1: GETTING STARTED

### Log into Starfish

Click **LOGINS** on the [UND home page](#), select Starfish, and log using your UND username and password. (You can also log in from Blackboard>MY UND tab>UND Services & Training tab>Go to Starfish.

### Profile, Appointment Preferences, & Notifications

Click  in the upper left-hand corner. Click on your name.

**PROFILE** - You can customize the profile that others see.

1. Select **EDIT PROFILE**.
2. **UPLOAD PHOTO** (optional).
3. Change **PREFERRED LOGIN PAGE** (optional).
4. **SHARE LINKS** (optional) – Copy and paste direct links into email messages and share your direct links with other staff. Direct links will take students directly to your calendar or profile after logging into Starfish.
  - Calendar - Below **LINK TO SCHEDULE AN APPOINTMENT WITH ME**, click **COPY LINK TO CLIPBOARD**.
  - Profile - Below **LINK TO VIEW MY PROFILE**, click **COPY LINK TO CLIPBOARD**.
5. View and update **CONTACT INFORMATION**.
6. The **TIME ZONE** will default to UND's time zone. Students in a different time zone will receive a confirmation email with the time of the appointment in their time zone.
7. Add or change your **TITLE** (optional). This is helpful if you have more than one role in Starfish.
8. Add information to **MY BIOGRAPHY** and **GENERAL OVERVIEW** (optional).
9. Click **SAVE CHANGES**.

**APPOINTMENT PREFERENCES** - In-depth information & instructions can be found by clicking [here](#).

1. Select **APPOINTMENT PREFERENCES**.
2. Set **MINIMUM APPOINTMENT LENGTH**. (Ex. Selecting 15 minutes allows the student to schedule with you on the 15, 30, 45, and hour mark. 30 minutes will allow students to schedule on the ½ hour, etc.)
3. Select your **SCHEDULING DEADLINE**.
4. Click on **ADD LOCATION** to add all possible locations for that office hour block. When you create Office Hours, you will select which of these locations apply to that set of office hours. The location will be included in the email sent to the student.
  - Select the ellipsis to **EDIT** or **DELETE** a location.
5. If you want to add a calendar manager, under **CALENDAR MANAGEMENT**, select **ADD CALENDAR MANAGER** and begin typing a user's name. Select the individual from the search results and click **ADD CALENDAR MANAGER**.

- Student employees must be added and removed by a Starfish administrator. Requests can be made by using the [role addition/removal request form](#).
- See below for additional information on Calendar Managers.

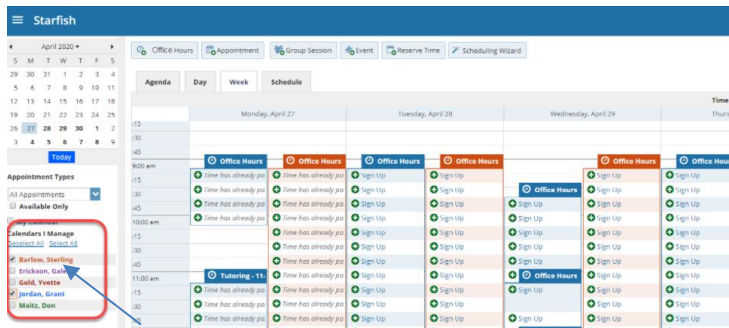
6. Click **SAVE CHANGES**.

## **NOTIFICATIONS**

1. Select **NOTIFICATIONS** and choose your settings for **TEXT NOTIFICATIONS, EMAIL NOTIFICATIONS, SUMMARY EMAILS, APPOINTMENT REMINDERS, and TRACKING ITEM UPDATES**.
  - If any of the flags in your list show the **EMERGENCY NOTIFICATION** Icon, you will receive an email right away when the flag is raised, regardless of your daily/weekly settings.
2. Click **SAVE CHANGES**.

## **Calendar Managers**

Any users who have been designated as Calendar Managers for your Starfish calendar will see your name listed as a calendar they can manage from their Appointments page.



If an individual's calendar is checked (see above), a calendar manager can use **ADD APPOINTMENT, GROUP SESSION, or RESERVE TIME** for that individual.


## **Sync your Starfish and Outlook Calendars**

### **REQUEST OUTLOOK ACCESS**

To allow syncing between your Starfish and Outlook calendars, your Starfish account must have access to your Outlook calendar and mailbox.

1. [Submit a ticket](#) to Tech Support and request that Starfish be given access to your Outlook calendar and mailbox. (You can still use the Starfish calendar without syncing with Outlook.)
2. Once you have received notice that #1 has been completed, complete the steps in the next section.

### **COMPLETE STARFISH SETTINGS**

1. Click  in the upper left-hand corner. Click on your name.
2. Select **APPOINTMENT PREFERENCES** and scroll down to **CALENDAR SYNC**.
3. Check box for **EMAIL ME CALENDAR ATTACHEMENTS FOR EVERY APPINTMENT CHANGE**.
4. If you do not want your office hour blocks to show up on your Outlook calendar, uncheck the **CHANGE TO MY OFFICE HOURS/GROUP SESSIONS** box.

5. Check **ALLOW STARFISH TO READ BUSY TIMES FROM MY OUTLOOK CALENDAR**.
6. Click **SAVE CHANGES**.

## SECTION 2: OFFICE HOURS


### Office Hours (Includes Walk-In Hours)

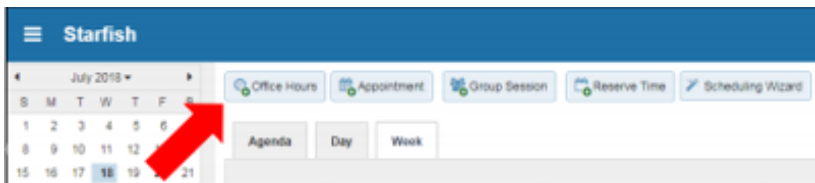
Office hours need to be set up if you want students to schedule appointments with you using Starfish. In-depth instructions can be found by clicking [here](#).

1. Sync our Starfish and Outlook calendars ([Section 1](#)) to have meetings, lunch, and other busy times from your Outlook calendar sent to Starfish. These times will then be unavailable for students to schedule during your Starfish office hours.
2. Set up your [APPOINTMENT PREFERENCES](#) and add [CALENDAR MANAGERS](#) (optional).
3. Create **OFFICE HOURS**. See instructions below.

### Set Up Office Hours

**IMPORTANT** - It works best if you set up an office hour block for each day, instead of a block for the entire week. This allows for easier changes to office hour blocks if you need changes for just one day instead of the entire week.

1. Click  in the upper left-hand corner. Select **APPOINTMENTS** on the left navigation bar and click the **ADD OFFICE HOURS** button.



2. Enter a **TITLE** if you would like something other than “Office Hours”. If you are going to have more than one type of Office Hours, use the title to make it easy for students to know what type of meetings you take during those hours.
3. Select **WHAT DAYS?** and any recurrence.
4. Use the **WHAT TIME?** fields to enter the start and end time for the office hours.
5. Select **WHERE?** meetings will be held using the checkbox(es) next to your location(s).
  - You need to add your locations in your [APPOINTMENT PREFERENCES](#) first.
  - If you select more than one location, students will be able to choose the preferred location. (
6. Select **OFFICE HOURS TYPE**.
7. Choose **HOW LONG?** This selection is overridden by the pre-determined length of the appointment depending on the reason the student chooses.
8. Select **APPOINTMENT TYPES**. If your role has permissions to add more than one appointment type, select which type(s) apply to this block of time.
9. Enter any **INSTRUCTIONS**. Instructions are included in the confirmation email to the student.
10. Enter **START/END DATE** if needed. Selecting **END OF TERM** works well if you are teaching classes and your office hours will change the next term. (You will need to enter new office hours the next term.)
11. Click **SUBMIT**.

## Edit or Cancel Office Hours

### EDIT YOUR OFFICE HOURS

1. Hover over the clock icon next to an office hour title on your Starfish calendar.



2. Click **EDIT** and make your changes.
3. Click **SUBMIT**.

#### NOTES:


- You cannot edit the days of the week or the nature of the recurrences (e.g. weekly), modify the time range for a single occurrence of an office hour, or edit the appointment type.
- Selecting **EDIT OFFICE HOURS** will modify all occurrences of this set of office hours.

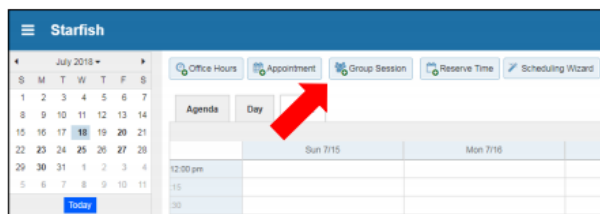
### DELETE/CANCEL YOUR OFFICE HOURS

1. Hover over the clock icon next to an office hour title on your Starfish calendar. (See #1 above.)
2. Click on the arrow behind **CANCEL** and then select one of the following:
  - **JUST THIS ONE**
  - **THE ENTIRE SERIES**. You will be prompted to confirm the date from which to cancel the series.
3. Click **SUBMIT**.

## Group Sessions

### SET UP A GROUP SESSION

1. Click  in the upper left-hand corner. Select **APPOINTMENTS** on the left navigation bar.
2. Click the **ADD GROUP SESSION** button.



3. Set up the group session.
4. Click **SUBMIT**.

### MANAGE GROUP PARTICIPANTS


You can add or remove participants in an individual group session using the **MANAGE PARTICIPANTS** link on the **DAY** view of the group session.

## SECTION 3: STUDENT FOLDERS

### Search for Students

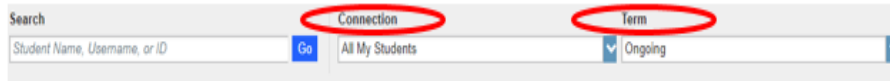
**NOTES:**

- Students are in Starfish for three semesters past their last enrollment. To narrow your list down to currently enrolled students, go to [Filtering by Student Information](#) and then refer to the instructions for **Attributes & Filtering by Attributes**. Select the attribute of **ENROLLED FOR CURRENT TERM** and the **SPECIFIC VALUE** of Ye. You may keep this filter on.

- Click  in the upper left-hand corner. Select **STUDENTS** on the left navigation bar. Click on **MY STUDENTS**.





- Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should select the current semester.



- Click on the student's name to view the student's folders.

### Student Folder Tabs

Access to information is determined by a role's permissions.

<b>OVERVIEW</b>	Includes info, if available, such as attributes, success plans, and student files.
<b>INFO</b>	Presents information, if available, such as test scores, demographics, programs, term status, and the Student Intake form.
<b>SUCCESS PLANS</b>	Shows any plans that have been created for the student.
<b>COURSES</b>	Any student that is enrolled in the current term will have courses populated on this screen. Use the term drop-down box at the top to select a different term.
<b>TRACKING</b>	Displays flags, kudos, todos, and referrals for each student.
<b>MEETINGS</b>	Displays documented appointments or walk-ins for each student. Click the plus sign to view the comments and outcomes of the meeting.  02-08-2018 at 8:30 am (Appointment)
<b>NOTES</b>	Any time a flag is raised or cleared, a note is added, or an appointment has comments, it will show in this tab. Click the plus sign to left of any note to read the comments.  Appointment Comment
<b>NETWORK</b>	Shows everyone in the student's success network.



## SECTION 4: COHORTS

Cohorts are groups of students based on criteria such as attributes, major, and demographic information. Cohorts can be applied in several ways, such as to filter students lists and to target flags. Cohorts are created by the Starfish tenant administrator and can only be seen by those with permission to view that particular cohort.

If you have access to any cohorts, you will find them by selecting the drop-down box as seen below:




### NOTES:

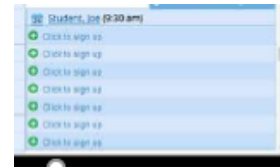
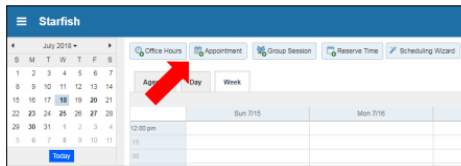
- Selecting one or more Cohorts will filter students in those lists to only students who are members of the selected Cohort(s). The display will be limited to students who are included in either Cohort and with whom the user has a relationship.
- The Cohort filters can also be accessed by clicking **ADDITIONAL FILTERS**. Doing so will allow you to easily combine a Cohort filter with another available filter (such as students with a particular tracking item who are in the Cohort).
- When you want to select multiple students and then apply an **ADDITIONAL FILTER**, add the **ADDITIONAL FILTER** first. This will retain your filter settings.

## SECTION 5: APPOINTMENTS/WALK-IN MEETINGS

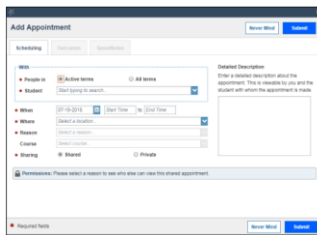
Students can only schedule appointments with you during your Office Hours. Calendar owners and their calendar managers can add appointments outside of the user's office hours.

### Add an Appointment

1. Click  in the upper left-hand corner. Select **APPOINTMENTS** on the left navigation bar.
2. Click the **ADD APPOINTMENT** button. **OR** Select a time within your office hours.




3. The following screen will appear. Begin typing the name of the student into the **STUDENT** drop-down list box. Select the desired student from the list.



4. Specify **WHEN** the meeting will take place (date, start time, end time) if you selected the first option of adding an individual **APPOINTMENT**.
5. Select **WHERE** the meeting will take place if you have more than one possible location.
6. Select a **REASON** for the meeting.
7. If relevant to the meeting, select a **COURSE** from the list.
8. Select a radio button for **SHARING** to either make the appointment **PRIVATE** or **SHARED**. The roles which can view a shared note are noted in the **PERMISSIONS** section.
9. Type a **DETAILED DESCRIPTION** for the meeting (recommended).
10. Click **SUBMIT**. Both the student & calendar owner will receive an email with an attachment for any future appointments. If you do not receive an email, check your **EMAIL NOTIFICATIONS** settings.

### Modify or Cancel an Appointment

All appointments should be cancelled in Starfish, so the student is sent the cancellation email.


1. Click  in the upper left-hand corner. Select **Appointments** on the left navigation bar.
2. Hover over the **DATE** icon of the appointment on your Starfish calendar.



3. Select **EDIT** or **CANCEL** from the **APPOINTMENT** pop-up card.
4. Edit appointment scheduling details. Send a message if cancelling.
5. Click **SUBMIT**.

## Document or Review Appointments

### ADD OR EDIT APPOINTMENT OUTCOMES & SPEEDNOTES

1. Click  in the upper left-hand corner. Select **APPOINTMENTS** on the left navigation bar.
2. Hover over the **APPOINTMENT** icon of an appointment on your Starfish calendar.



3. Select **OUTCOMES** from the **APPOINTMENT** pop-up card.
4. If the student is a no-show, check the box labeled **STUDENT MISSED APPOINTMENT**.
5. Add your notes in the **COMMENTS** box
6. Check the **EMAIL** checkbox labeled **SEND A COPY OF NOTE TO STUDENT** (optional).
7. If available, check the appropriate **SPEEDNOTES** boxes. Speednotes will not be included in the email sent to students if you elect to share the appointment comments.
8. Click **SUBMIT**.

## Walk-In Meetings

You must have your office hours set up as **Scheduled Appointments and Walk-Ins** or **Walk-Ins Only** in order to add a Walk-In Meeting.


1. Hover over the clock icon next to an office hour title on your Starfish calendar.



2. Click the **ADD WALK-IN** button. Begin typing the name of the student into the **STUDENT** drop-down list box. Select the desired student from the list.

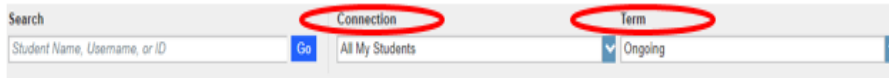
3. Specify **WHEN** (date, start and end time) and **WHERE** the meeting took place.
4. Select a **REASON** for the meeting.
5. Select a radio button for **SHARING** to either make the appointment **PRIVATE** or **SHARED**. The roles which can view a shared note are noted in the **PERMISSIONS** section.
6. Document **COMMENTS** and **SPEEDNOTES** (if available) upon completion of the meeting.
7. Click **SUBMIT**.

## REVIEW APPOINTMENT OUTCOMES & SPEEDNOTES

1. Click  in the upper left-hand corner. Select **STUDENTS** on the left navigation bar. Click on **MY STUDENTS**.



2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should select the current semester.



3. Click on the student's name to open the student's folders.
4. Click on the **MEETINGS** tab.



5. Click the plus sign to the left of any appointment to view additional details including any comments entered on the **OUTCOMES** tab and any activities that were checked off on the **SPEEDNOTES** tab.


## SECTION 6: SERVICES

You can request that a Service be added to the Starfish Service Catalog. This service can:

- Provide information about your office or department
- Include individuals with whom students can schedule appointments

To request that a Service be added for your office or department, click [here](#) and complete the form. After your service is created, you can copy and provide a direct link to the service to students. Students will be taken directly to the service after logging into Starfish (see below).

### Direct Links

1. Click on  in the upper left-hand corner. Click on your name.
2. Click on **MY SUCCESS NETWORK**.
3. Locate and click on your Service. (You may need to click on **SHOW OTHER SERVICES** at the bottom.)
4. Click on **COPY PROFILE LINK**. This allows you to copy and paste the link into email messages or the signature line of your emails.


[Share Links](#)

[Copy Profile Link](#)

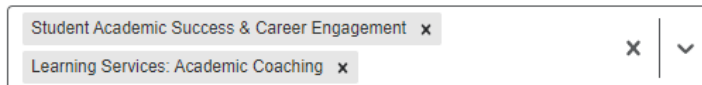
## SECTION 7: KIOSK & WAITING ROOM MANAGEMENT

The kiosk feature provides a physical location where students can check in to previously scheduled appointments or for a Walk-In meeting, if available. As students log into the Kiosk, the waiting room queue will populate. Advisors/staff, with access, can view the waiting room.

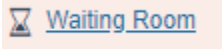
### Waiting Room Management

- 1) Click on  in the upper left-hand corner. Mak
- 2) Make sure the sound on your computer is on and the waiting room doorbell is turned on (upper right of your waiting room).
- 3) There are two ways to view the waiting room.
  - Select **WAITING ROOM** from the left-hand navigation bar. You will see the services you are part of and the waiting room(s) below the services. Click the X behind a service if you wish to hide it.

Filter by Service:



**OR**

- Select **HOME** from the left-hand navigation bar. In the top left corner, you will see **MY SERVICES**. Scroll down to see all services of which you are a part. Click **WAITING ROOM** to enter.
- 
- 4) You will see an area for **Walk-Ins** and one for **Appointments**.
  - 5) For each student in the Waiting Room queue, you can click on the student's name to view their student folder. When students sign into the kiosk, they also have the option to provide details about what they want to discuss.
  - 6) For **Walk-In Meetings**, click the three dots behind a student's name and choose **START MEETING**. Starting a meeting will remove that student from the queue. If the student left before the start of the meeting, click **STUDENT LEFT**.
    - The **ADD WALK-IN** card will display. At the end of your meeting, enter **END TIME** and **LOCATION** (if not populated). Add comments in the **OUTCOME** tab and check topics in the **SPEEDNOTES** tab (if set up for the type of appointment being used).
    - Click **SUBMIT**.
  - 7) For **Scheduled Appointments**, click the **APPOINTMENTS** tab and click the three dots behind the student's name. Choose **START MEETING**.


WALK-INS (0)

APPOINTMENTS (1)

- The **EDIT APPOINTMENT** card will display. At the end of your meeting, document as you would a Walk-In Meeting and adjust the **END TIME** as needed.
- Click **SUBMIT**.

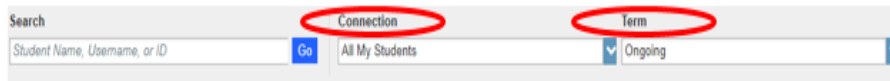
## SECTION 8: NOTES


### Add Notes

1. Click on  **Starfish** in the upper left-hand corner. Select **STUDENTS**. Click on **MY STUDENTS**.



2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should select the current semester.



3. Click on the student's name.
4. Select the **ADD NOTE** icon.  

5. Choose the note type. You will see notes for which you have permission. Complete the note.
6. Click **SUBMIT**.

### Review Notes

1. Follow steps #1-3 above.
2. Click on the student's name to open the student's folders. Select the **NOTES** tab.



3. Add additional optional criteria for: Created in Term, Written By, and Note Type.



4. Click the plus sign to the left of any note to read the comments.

### Print Notes

1. Highlight text in the note.
2. Right click your mouse and select **PRINT**.

## SECTION 9: PROSPECTIVE STUDENTS

Prospective student accounts can be created for students not yet in Starfish by those with permission. Steps must be taken first to determine if a student already has an active Starfish account.

### NOTES:

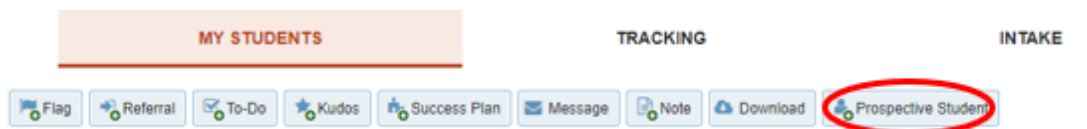
- Users with permission can schedule/document an appointment, make a note, and send a message to prospective students.
- Once a student is matriculated (new students) or enrolled (returning students away for a length of time), the prospective student account can be merged into the student's active account.

### Create a Prospective Student Account

**It is important that you follow the instructions below carefully before creating the account.**

#### CREATE AN ACCOUNT FROM THE MY STUDENT TAB

1. Search for the student in the **SEARCH FOR STUDENTS** search box in the top right of the display.
2. Any prospective students that match your criteria will be included in the search results.
  - If a prospective student account already exists for this student, click the name to open the student's folder. You do not need to create an account.
  - If no account exists for that student, you will see **"No people found"** and may continue the process of creating a prospective student account as described in the steps below.
3. Click the **PROSPECTIVE STUDENT** button at the top of the **MY STUDENTS** list.



4. Fill in the form that pops up and click **FIND** to receive a list of possible matches. Options include:
  - **USE** the listed prospective student. This option appears only if a possible match is returned. **OR**
  - Click **CREATE NEW** to create a prospective student account if no matches are found.
5. Fill in the **CREATE A PROSPECTIVE STUDENT** form with the required information. The fields will be pre-populated with any of the information you entered in Step 4.
6. Click **CREATE** to create the prospective student account.

### Working with a Prospective Student Account

#### ACCESS THE PROSPECTIVE STUDENT FOLDER

Users with permission to view prospective student accounts can access prospective student folders by searching for the student in the **SEARCH FOR STUDENTS** search box in the top right of the display.

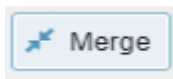


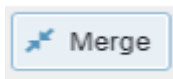
## **SCHEDULE AND DOCUMENT AN APPOINTMENT**

- If the prospective student account has already been created, an appointment can be added from the student folder by selecting **ADD MEETING**. If an account has not yet been created, see instructions above for creating a prospective student account.
- Appointment reasons available will be dependent on the appointment type.
- Meetings with prospective students can be documented in the **OUTCOMES** and **SPEEDNOTES** (if available for the appointment type) tabs of the appointment.

## **Merge a Prospective Student Account with an Active Starfish Account**

Users who have permission to merge prospective student accounts into existing student accounts will be able to merge the prospective and active accounts once the active account is available.

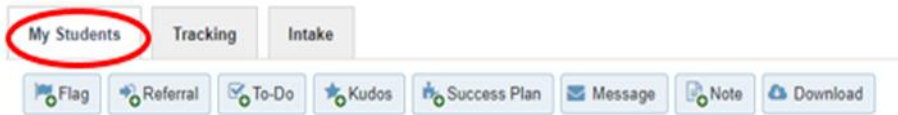


1. Click  to access the Merge Record, which displays any existing accounts where the first and last name match the information for the prospective student.
2. If the desired student is listed in the possible matches, click the **MERGE** button beside that student.
3. This opens the **CONFIRM MERGE** dialog, showing additional information for the prospective student and the student into which the prospective student account will be merged.
4. After verifying that the accounts should be merged, click **COMPLETE MERGE**.

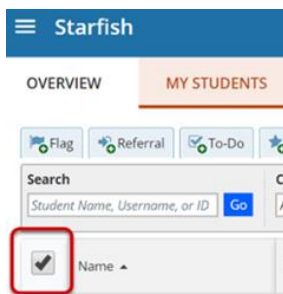
## SECTION 10: SELECT ALL (PERFORM BULK ACTIONS)

You can perform bulk actions when interacting with students by using the Select All feature.

1. Click on  in the upper left-hand corner. Select **STUDENTS**; click on my **MY STUDENTS**.



2. Select your search criteria (role, filtering, etc.)
3. Check the **SELECT ALL** checkbox to select all students in the list. The maximum is 15,000 students or items. If you reach this limit, you will be prompted to adjust your filters.



4. Perform your bulk action such as sending a message or raising a flag or kudos, etc.
5. Select **YES, FINISH** to confirm your selection.
6. You will receive a message indicating that your batch action has been queued.
7. There are several options you can do next:
  - **BACK TO STUDENT LIST**
  - **REVIEW QUEUED ITEMS ON THE HOME PAGE**
  - **CANCEL THE BATCH SEND**

If you remain idle on this page and the computer is idle for 2 minutes, the page automatically refreshes, the batch job begins to process, and you are returned to the student list.

## SECTION 11: TRACKING ITEMS

Flags, Kudos, Todos, and Referrals are also known as **TRACKING ITEMS**. See below for descriptions, best practices, outreach flow, raising, clearing, assigning, and filtering. Ability to raise and view specific tracking items vary by role.

### Course Flags

This should be marked	If <b>ANY</b> of these situations are present:
<b>EARLY ALERT</b> In Danger of Failing	An Early Alert Progress Survey is open and... <ul style="list-style-type: none"> <li>• student shows patterns of attendance that could affect performance</li> <li>• student is missing critical or large assignment(s)</li> <li>• student has performed poorly on an exam</li> <li>• student attends class but does not participate</li> <li>• online student is not participating in course</li> </ul>
<b>EARLY ALERT</b> No Show	An Early Alert Progress Survey is open and... <ul style="list-style-type: none"> <li>• student has never attended class</li> <li>• online student has not logged into Blackboard</li> </ul>
<b>MIDTERM DEFICIENCY</b>	A Midterm Progress Survey is open and... <ul style="list-style-type: none"> <li>• student's grade is:                             <ul style="list-style-type: none"> <li>○ <u>Undergraduate Courses</u>: below a C or is unsatisfactory in a pass/fail course</li> <li>○ <u>Graduate Courses</u>: below a B or is unsatisfactory in a pass/fail course</li> </ul> </li> <li>• student has not turned in multiple assignments</li> <li>• student is not attending class regularly, thus, impacting performance</li> <li>• student is not meeting course expectations</li> <li>• student's performance has been decreasing</li> </ul>
<b>GENERAL ACADEMIC CONCERN</b>	An Early Alert or Midterm Progress Survey is not open and the student demonstrates any of the above behaviors.

### COURSE FLAG WORKFLOW

1. Instructor raises flag.
2. Advisor & student receive notification by email. Emails to the students come from the college under which the course is housed.
3. Advisors are asked to document contacts made with students.
4. Others with permission can view flags.
5. Instructors are encouraged to clear a flag when the situation is resolved.

## Non-Course Flags

<b>STUDENT BEHAVIOR CONCERN</b>	Can be raised by instructor, advisor, or staff when there is a behavioral concern in or out of the classroom. A reference guide for this flag (and a general concern note) can be found <a href="#">here</a> .
<b>STUDENT ACADEMIC INTEGRITY CONCERN</b>	Can be raised by instructor, advisor, or staff when there is a concern about academic integrity such as cheating, plagiarism, misuse of academic resources, etc. A reference guide for this flag can be found <a href="#">here</a> .

### NOTES:

- Only the Office of Student Rights & Responsibilities (OSRR) can view the above flags.

### FLAG WORKFLOW

1. Flag is raised and Office of Student Rights & Responsibilities is notified.
2. Flag raiser is contacted if more information is needed.

## Kudos

### COURSE KUDOS

Course kudos can be raised by instructor during an Early Alert and Midterm Progress Survey as well as outside of the surveys. Emails to the student will come from the instructor who raised the kudos.

<b>GREAT WORK</b>	Raise when student exceeds expectations.
<b>SHOWING IMPROVEMENT</b>	Raise when student has shown improvement as evidenced by increase in attendance, test/homework scores, class participation, improved coursework, etc..

### NON-COURSE KUDOS


There are a number of non-course kudos which can be raised based on a user's role, including **Kudos to You!** which can be raised by anyone with a role in Starfish. Emails to the student will come from the raiser.

## Referrals

Instructors, advisors, and staff can refer students to various offices and services across campus. Students will receive an email when the referral is raised. The referral workflow is below:

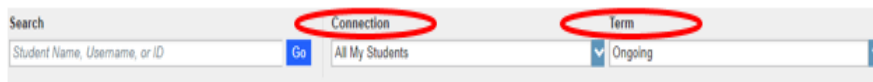
1. Referral is created.
2. Provider (in most cases) & student receive notification by email; the email to student will come from the creator.
3. Student is contacted by provider (in most cases).
4. Provider is encouraged to close referral when there is contact with the student.

## Raise a Tracking Item

1. Click on  in the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.

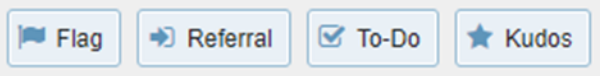


3. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should select the current semester.



You can also pull up a group of students (ex. course or advisees). You can narrow your list further by [filtering by student information](#).

4. Check the box in front of the student's name. You can select more than one student at a time if you have elected to pull up a targeted group of students (see #3 above) by clicking on the check box in front of their names.
5. Select the add **FLAG**, **KUDOS**, **TODO**, or **REFERRAL** icon.




6. Select the preferred tracking item from the list.
7. If you are the instructor, select a course from the **COURSE CONTEXT** drop-down menu.
8. Add comments in the **COMMENT** box (optional). These comments will show up in the email to the student(s) if the email template is configured for comments. If you are using different comments for each student, do not bulk raise the item. Add a tracking item individually for each student.
9. Click **SAVE**.

### NOTES:

- The **PERMISSIONS** area lists roles that have permission to view the selected tracking item and any comments.

## Clear a Tracking Item

Instructors, advisors, and staff are encouraged to clear a tracking item after it is resolved or if it was raised by mistake.

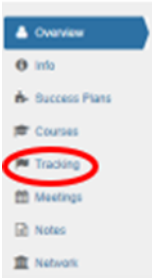
1. Click on  in the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



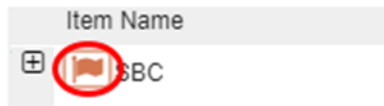
2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should use the current semester.

Search  
Student Name, Username, or ID   **Connection** All My Students **Term** Ongoing

3. Click on the student's name to bring up the student's folders. Click on the **TRACKING** tab.



4. Click on the icon in front of the tracking item. (Below is an example of a flag.)



5. Select **CLEAR**. Select a reason for clearing the item. Select other items as appropriate.
6. Click **SUBMIT**.

## Assign a Tracking Item

Items can be assigned to another individual if a user has permission to do so and if that individual has been listed as a user to which the tracking item can be assigned.

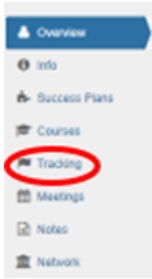
1. Click on **Starfish** in the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



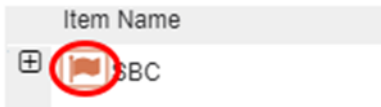
2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**.

Search  
Student Name, Username, or ID   **Connection** All My Students **Term** Ongoing

3. Click on the student's name to bring up the student's folders. Select the **TRACKING** tab.



4. Click on the icon in front of the tracking item. (Below is an example of a flag.)



5. Click **ASSIGN** (will only be available if you have been identified as an assignor of the item).
6. Select **OTHER PROVIDER**.
7. Select an individual.
8. Click **SUBMIT**. An email will go to that individual advising that the item has been assigned.

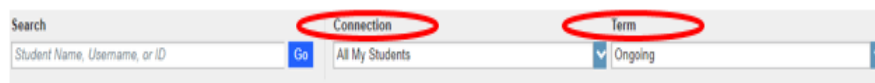
## Filter by Tracking Item

You can pull multiple students with the same tracking item.

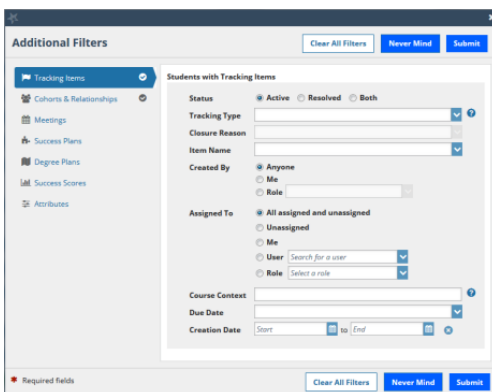
1. Click on  in the upper left-hand corner. Select **STUDENTS**; click on **TRACKING**.



2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should use the current semester.



3. Click on **TRACKING ITEMS**. Check **STUDENTS WITH TRACKING ITEMS**.




4. You can then make a variety of selections to further filter the results.
5. Click **SUBMIT**



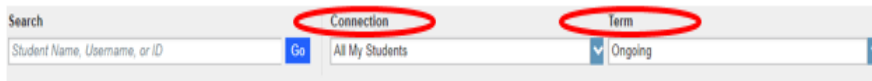
## SECTION 12: MESSAGES

### Send a Message

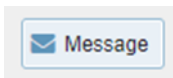
1. Click on  **Starfish** in the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should use the current semester.



3. You can also pull up a group of students (ex. course or advisees). You can narrow your list further by [filtering by student information](#).
4. Check the box in front of the student's name. You can select more than one student at a time if you have elected to pull up a targeted group of students (see #3 above).
5. Select the add **MESSAGE** icon.



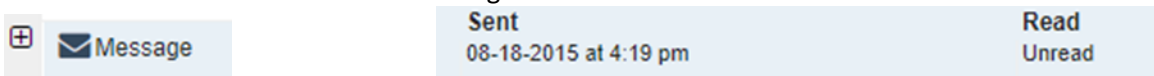
6. Enter your subject in the **SUBJECT** box and then your message in the **EMAIL** box.
7. Check **SEND COPY TO YOURSELF** if desired.
8. Click **SUBMIT**.

#### NOTES:

- Students will be blind-copied if you message multiple students.
- Only you and the student will be able to see your message.
- You will be able to view whether the student opened your message.

### Review Messages

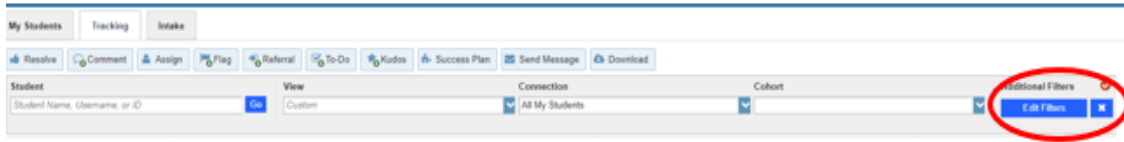
1. Follow steps 1 & 2 from above.
2. Click on the student's name to open the student's folders.
3. Click on the **NOTES** tab.
4. Click the plus sign to the left of any message to read the comments. You will also be able to view whether the student has read the message.



## SECTION 13: FILTERING BY STUDENT INFORMATION

Starfish can help you target specific students based on various criteria.


- Each criteria you add creates a narrower selection of students.
- From the main page, click on the **X** behind **EDIT FILTERS** to clear all filters.

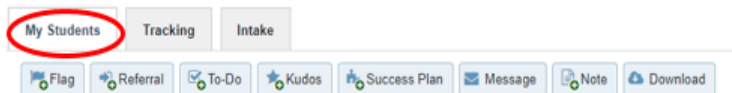


### TIPS:

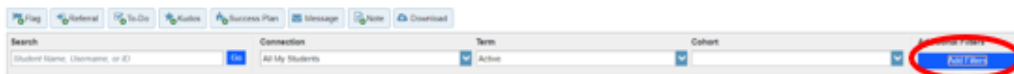
- For the most complete list of students, clear additional filters, select the “Ally My Students” option for your connection, and “All” for your term. (Some functions are not available for students with whom you only have relationships that in the past or future.)
- When you want to select multiple students and then apply an additional filter, add the Additional Filter first. You can then narrow down your results further by selecting the View, Connection, Term, or Cohort drop down.

### Filter by Cohorts & Relationships

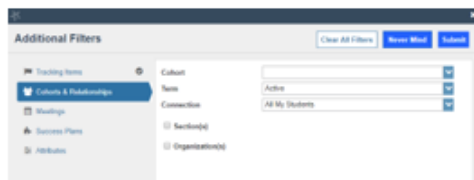
1. Click on  in the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Click **ADD FILTERS**.




3. Click on **COHORTS & RELATIONSHIPS** and select your criteria.
  - **COHORT** – You will be able to select those cohorts which you have permission to see.
  - **TERM** – Select the term.
  - **CONNECTION** – Select the role if you have more than one.

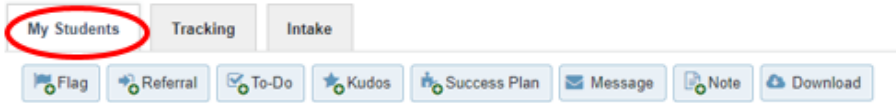


4. Select one of the following:
  - **SECTION(S)** – You will see 25; to narrow it down, enter additional filtering details in the **FIND SECTIONS** box and click **SEARCH**. Highlight sections & click the right arrow button.
  - **ORGANIZATION(S)** – Highlight desired organizations & click the right arrow button.

5. Click **SUBMIT**.

## Filter by Meetings

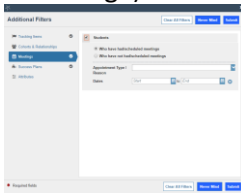
1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Pick the correct **CONNECTION** (& **COHORT** if applicable) & click **ADD FILTERS**.



3. Select **MEETINGS**. Click the **STUDENTS** checkbox to bring up filtering options (appointment type & date range).




4. Click **SUBMIT**.

### NOTES:

- Cancelled appointments will not be included in the filter results but No Shows will be included.

## Filter by Success Plans

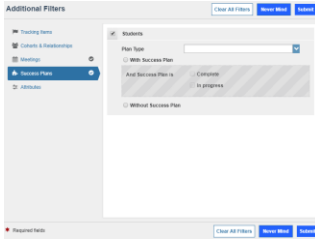
1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Pick the correct **CONNECTION** (& **COHORT** if applicable) & click **ADD FILTERS**.



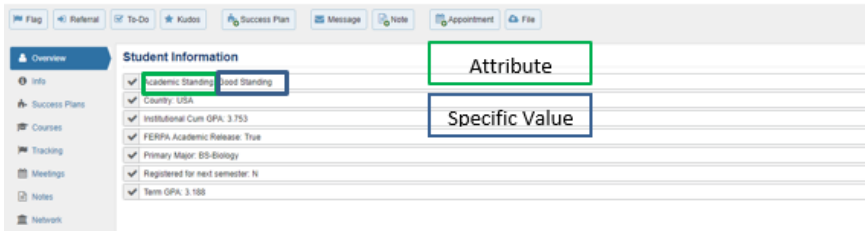
3. Select **SUCCESS PLANS**. Click the **STUDENTS** checkbox.




4. Select the **PLAN TYPE**. You can filter by students with completed or in progress plans.
5. Click **SUBMIT**.

## Attributes and Filtering by Attributes

**ATTRIBUTES** - In the student's **OVERVIEW** tab within the student's folder, you will find student information or **ATTRIBUTES**. Below, you can see an **ATTRIBUTE** titled "Academic Standing", followed by its **SPECIFIC VALUE** (Good Standing).



### FILTER BY ATTRIBUTES

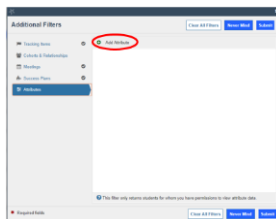
1. Click on  the upper left-hand corner. Select **STUDENTS** and then **MY STUDENTS**.



2. Pick the correct **CONNECTION** (& **COHORT** if applicable) & click **ADD FILTERS**. When filtering by major, the **TERM** = Ongoing.



3. Click on **ATTRIBUTES** and select **+ ADD ATTRIBUTE**.




4. Select the attribute(s) you want to filter using the drop-down menu. You can search by multiple attributes, by adding another attribute. When filtering by major, the **TERM** = No Term.

The screenshot shows a form titled "Add Attribute". It is divided into two main sections: "Attribute" and "Value".  
In the "Attribute" section, there is a dropdown menu for "Country" and another dropdown menu for "Term" with the text "Filter by Term" below it.  
In the "Value" section, there are three radio buttons: "Assigned to Student", "Not Assigned to Student", and "Specific Value". The "Specific Value" radio button is selected. Below the radio buttons is an empty text input field.

5. Select the radio button in front of **SPECIFIC VALUE**. If available, select from the drop-down menu. If no drop-down menu is available, enter the value (found on the [Starfish support website](#) under **SPECIFIC VALUES FOR FILTERING BY ATTRIBUTES**).
6. Click **SUBMIT**.

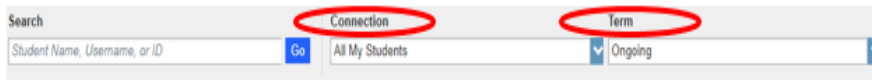
## SECTION 14: STUDENT INTAKE FORM

### View Or Print an Intake Form

1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.




2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should use the current semester.



3. Click on the student's name to view the student's folders.
4. Click on the **INFO** tab.
5. Scroll to the bottom to view the **STUDENT INTAKE** if one has been completed.
6. To print the form, select the **VIEW/PRINT** option to open a printable view of the form in a new tab.
7. Click the **PRINT INTAKE FORM** button in the upper right-hand corner of the form.

### Filter Based on Intake Answers

1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **INTAKE**.

MY STUDENTS

TRACKING


INTAKE

2. Students can be filtered based on:
  - **ACTIVE CONNECTION:** Select a connection from the menu at the top of the list.
  - **COHORT:** Cohorts that you have permission to view will display on the drop-down list.
    1. Select one or more cohorts from the drop-down list.
    2. Click anywhere outside of the cohort list to apply the cohort(s) selection.
  - **LAST UPDATED DATE RANGE:** Select your dates.
  - **FILTER STUDENTS:**
    1. Click on an intake question to display the answers available for that question. You may select up to five questions to apply as filters.
    2. Select one or more answers for each questions to apply as filters (not available for text boxes).
    3. Click **FILTER STUDENTS** to apply the filter to the student list.
    4. The **APPLIED FILTERS** ribbon above the student list will update to reflect how many filters have been applied. Click the menu to view the active filters and to remove one or more of the filters.
    5. If you adjust your filter selections, click **FILTER STUDENTS** to apply the new selection.

## SECTION 15: STUDENT FILES & LISTS

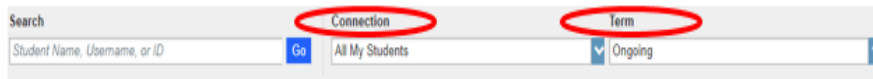
If your role allows, you can download/upload files and download a student list. Students do not have permission to view uploaded files.

### View or Download a Student File

1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



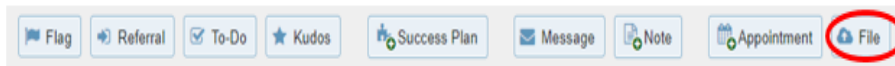
2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should use the current semester.



3. Click on the student's name to view the student's folders.
4. Click on the **OVERVIEW** tab. You will see downloadable **STUDENT FILES**.

### Upload a Student File

1. Click the **UPLOAD FILE** button at the top of the student's folder.




2. Click **BROWSE** to locate the file on your computer.
3. Select the file you wish to upload.
4. Click **ATTACH** to upload the file to the student's folder.

#### NOTE:

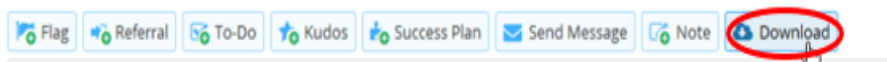
- **All roles, except students, have the ability to view any uploaded file. Confidential information, such as files for the Office of Student Rights & Responsibilities, should not be uploaded here.**

### Download a Student List

1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Once you have an identified list of students, click the **DOWNLOAD** button.



## SECTION 16: PROGRESS SURVEYS

1. Select the progress survey link on your Starfish **HOME** page to view your outstanding progress surveys (only visible when you have active surveys).

 Outstanding Progress Surveys: [Introductory Chemistry \(CHEM-115-035088-01-1930-12465\): Test - New Progress Survey](#)

2. If you have more than one progress survey, you will see them presented in a drop-down box.
3. The **due date** of the survey is listed under the course name.
4. Click the “**i**” icon to view information about each tracking item.



Select the **SEARCH** button to search for a particular student.



5. For each student on the class roster, check the box for any item that applies to the student. You may select multiple items (flags, kudos, & referrals). If you have no concerns about a student, consider selecting a kudos.
6. When you select a flag, kudos, or referral, a box will appear allowing you to write a note to the student (optional).
7. Your work is automatically saved in draft as you move along. **DO NOT SUBMIT UNTIL THE SURVEY IS FINAL. YOU CANNOT GO BACK TO EDIT A SURVEY ONCE IT IS SUBMITTED.**
8. Once you have finalized the survey, click **SUBMIT**. Click **SUBMIT** even if you have no feedback to provide. This will record that the survey has been completed. You can still [manually](#) raise a flag, kudos, or referral at any point in the semester.
9. When you submit the survey, you will be given the option of selecting **NEXT PROGRESS SURVEY** to move to the next survey if you have additional surveys to complete. If you are not ready to work on this course, you can select another course (if there more outstanding surveys) from the drop-down box.

### NOTES:


- If you raise a tracking item in error, [clear](#) the item and indicate that it was raised in error.

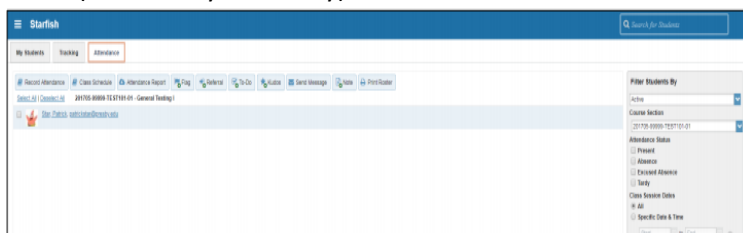


## SECTION 17: COURSE ATTENDANCE

The Starfish Attendance feature allows faculty to track and report course attendance. Faculty can also filter by attendance data and take actions (like raising flags) from within the Attendance tab.

### Initial Set-Up

1. Click on  the upper left-hand corner. Select **STUDENTS**.
2. Select the **ATTENDANCE** tab under **STUDENTS**; this displays students enrolled in each course you teach (visible only to faculty).



3. Click the tab labeled **CLASS SCHEDULE**.
4. You may choose the **SCHEDULE** option to create a recurring class schedule or **SINGLE MEETING TIME** for a one-time session.



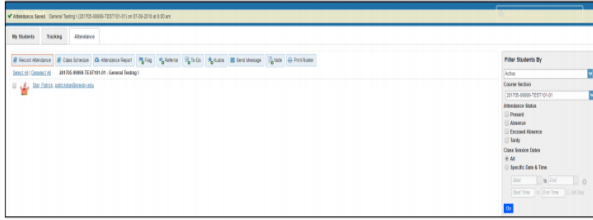
5. Click **SUBMIT**.
6. Repeat the process for each course you teach.

To **edit** a recurring schedule, locate the meeting time you want to edit and make the appropriate changes.

To **delete** a recurring schedule, select the DELETE icon to the right of the schedule section you would like to remove.

### Record Course Attendance

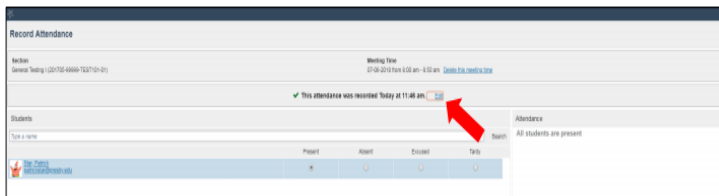
1. Select **RECORD ATTENDANCE**. (You must first set up meeting times.)



2. Select the course for which you would like to record attendance.
3. Select a meeting time. Select **NEXT**.
4. **PRESENT** is the default setting. You can choose from **PRESENT, ABSENT, EXCUSED, or TARDY**.
5. Use the radio button to mark students accordingly.

### Edit Course Attendance

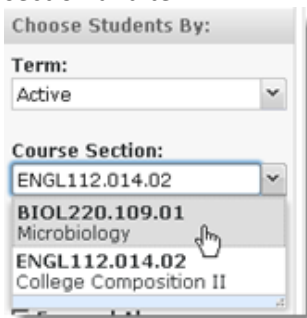
1. To edit previously recorded attendance, click the **RECORD ATTENDANCE** button and choose the class for which you would like to edit. Click **NEXT**.
2. Click **EDIT** to make changes.



3. Select **SAVE**.

### Review Course Attendance


1. On the right side of the **ATTENDANCE** screen, locate **CHOOSE STUDENTS BY** and select the term and course section from the list presented to review the attendance information for your selected section and term.

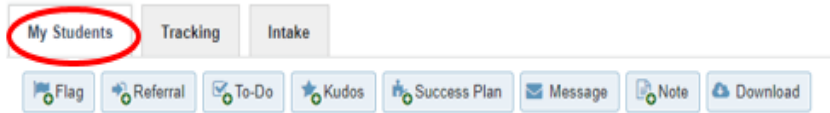


2. Once the course is selected, students in the course are listed in the main part of the page along with any available attendance data about them in the course.
3. You can filter the list of students presented based on specific attendance statuses (**PRESENT, ABSENCE, EXCUSED ABSENCE, or TARDY**) and for a range of course meeting dates. This will update the display to include all attendance data for each student that fits the criteria.

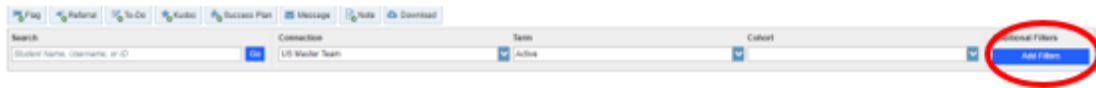
## SECTION 18: EVENT ATTENDANCE

### View Event Attendance

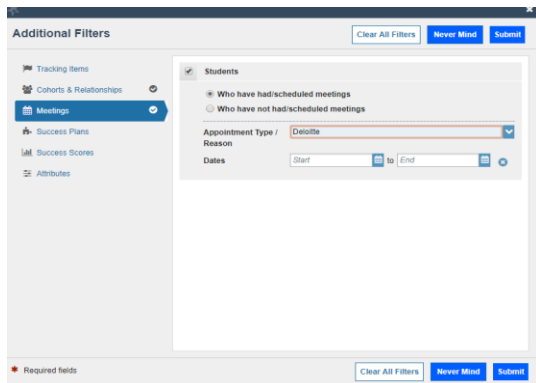
1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Click **ADD FILTERS**.



3. From the **ADDITIONAL FILTERS** menu, select **MEETINGS** and then check the following:
  - **STUDENT**
  - **WHO HAVE HAD/SCHEDULED MEETINGS**
  - **APPOINTMENT TYPE/REASON** - Scroll down to find **EVENTS** and then select **EVENT TITLE**.
  - **DATE OF EVENT** (if unsure, leave this blank)



4. Click **SUBMIT**.


#### NOTES:

- Not all roles have permission to view event attendance.

## SECTION 19: SUCCESS PLANS

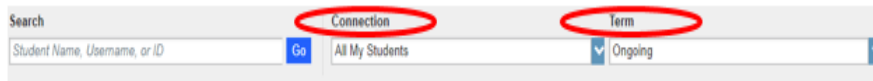
Success plans are a combination of tracking items (usually ToDos). Plans can be assigned to a special population of students (ex. students receiving tuition waivers, students on probation, etc.)

### View or Print a Success Plan

1. Click on  **Starfish** in the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.



2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**. Instructors should use the current semester.



3. Click on the student's name to bring up the student's folders.
4. Locate the **SUCCESS PLAN** within the **OVERVIEW** folder.

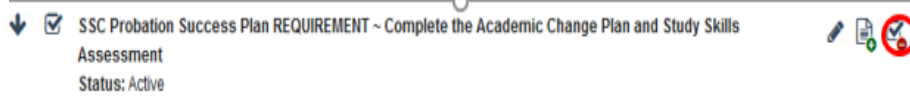
### Success Plans

 **SSC Undeclared Probation Success Plan (First Semester-1) (Status: In Progress)**

5. Click the arrow before the **SUCCESS PLAN**.
6. Select **VIEW/PRINT PLAN**.


### Check off Completed Items

1. Follow Steps 1-5 above.
2. Select **EDIT PLAN**.
3. Click on the **CHECKMARK** icon to the left of the item you want to clear.



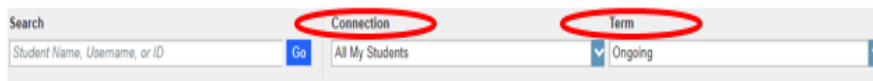
4. Select a reason for clearing the item. Make a **COMMENT** (optional).
5. Click **SUBMIT**.

## Assign a Success Plan

1. Click on  the upper left-hand corner. Select **STUDENTS**; click on **MY STUDENTS**.

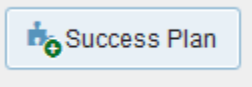


2. Type the name of the student in the **SEARCH** box & select the **CONNECTION** and **TERM**. For an advisor connection, use **ONGOING** as the **TERM**.

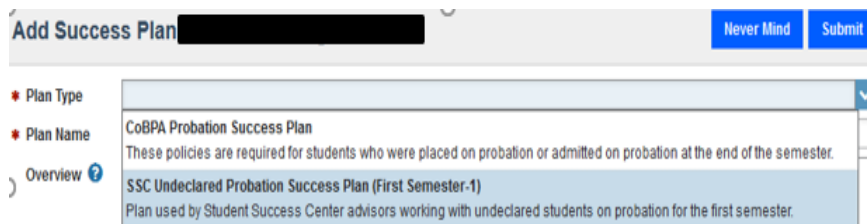


You can also pull up a group of students by selecting **CONNECTION** (ex. course or advisees). You can then narrow your list further by [filtering by student information](#).

3. Check the box in front of the student's name. You can [assign to more than one student at a time](#) if you have elected to pull up a group of students. See #2 above.
4. Click on **ADD SUCCESS PLAN**.



5. Select the desired **PLAN TYPE** from the drop-down list presented.



6. Once you have selected a plan, the default set of information and tracking items will be filled in.
7. Click **Submit**.