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.
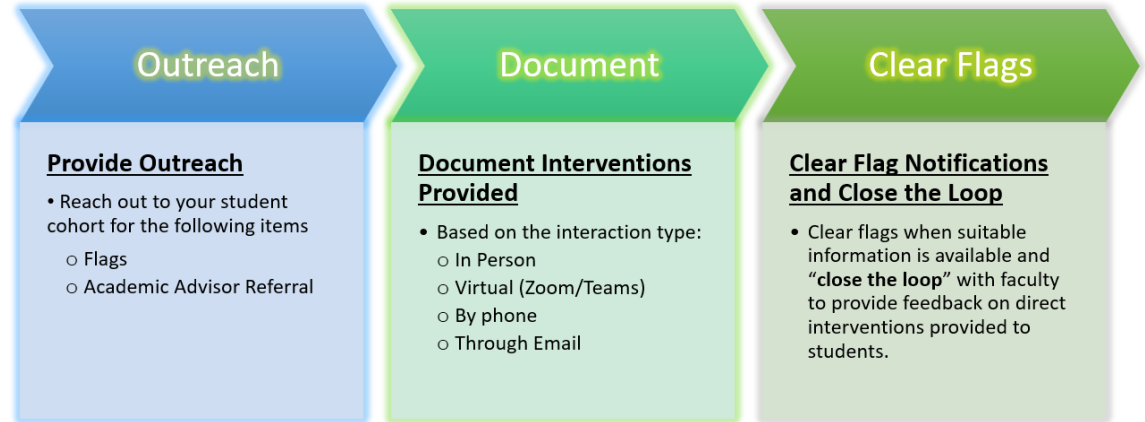
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starfish@tamucc.edu

Starfish

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
     o Use General Flag Outreach Templates
   - Could be Personalized Outreach to a Unique Student
     o 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

Outreach

Provide Outreach

- Reach out to your student cohort for the following items
  o Flags
  o Academic Advisor Referral

Document

Document Interventions Provided

- Based on the interaction type:
  o In Person
  o Virtual (Zoom/Teams)
  o By phone
  o Through Email

Clear Flags

Clear Flag Notifications and Close the Loop

- Clear flags when suitable information is available and **"close the loop"** with faculty to provide feedback on direct interventions provided to students.

Positive Closure Reason Guide:

In general, Flags can be cleared with "Positive" outcomes when direct communications/interventions with a flagged student have been established.

This often includes meeting the following:

- *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

Login to Starfish

Option 1 – Direct Link

Access Starfish by using the Direct link:
- https://starfish.tamucc.edu
- You may be prompted to complete the University's Duo authentication.
- Once completed, you will be routed into your Starfish Account.

Option 2 – Blackboard Link

Access Starfish by logging into Blackboard at:
- https://bb9.tamucc.edu
- You may be prompted to complete the University's Duo Authentication. Once Authenticated, you will arrive at the Blackboard landing page.
- Click the Starfish link located at the top of the list in the Tools module to access your Starfish account.

Search for Flagged Students

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

   ≡ **Starfish**

2. **In the Starfish Navigation Menu, select "Students", then the "Tracking" tab.**

   The Tracking tab provides the following elements:
   A. Students with Tracking Items
   B. Tracking Item Name
   C. Item Status
   D. The person who raised the item and date it was created

	Student	Item Name	Status	Created ▲
☐	**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.)
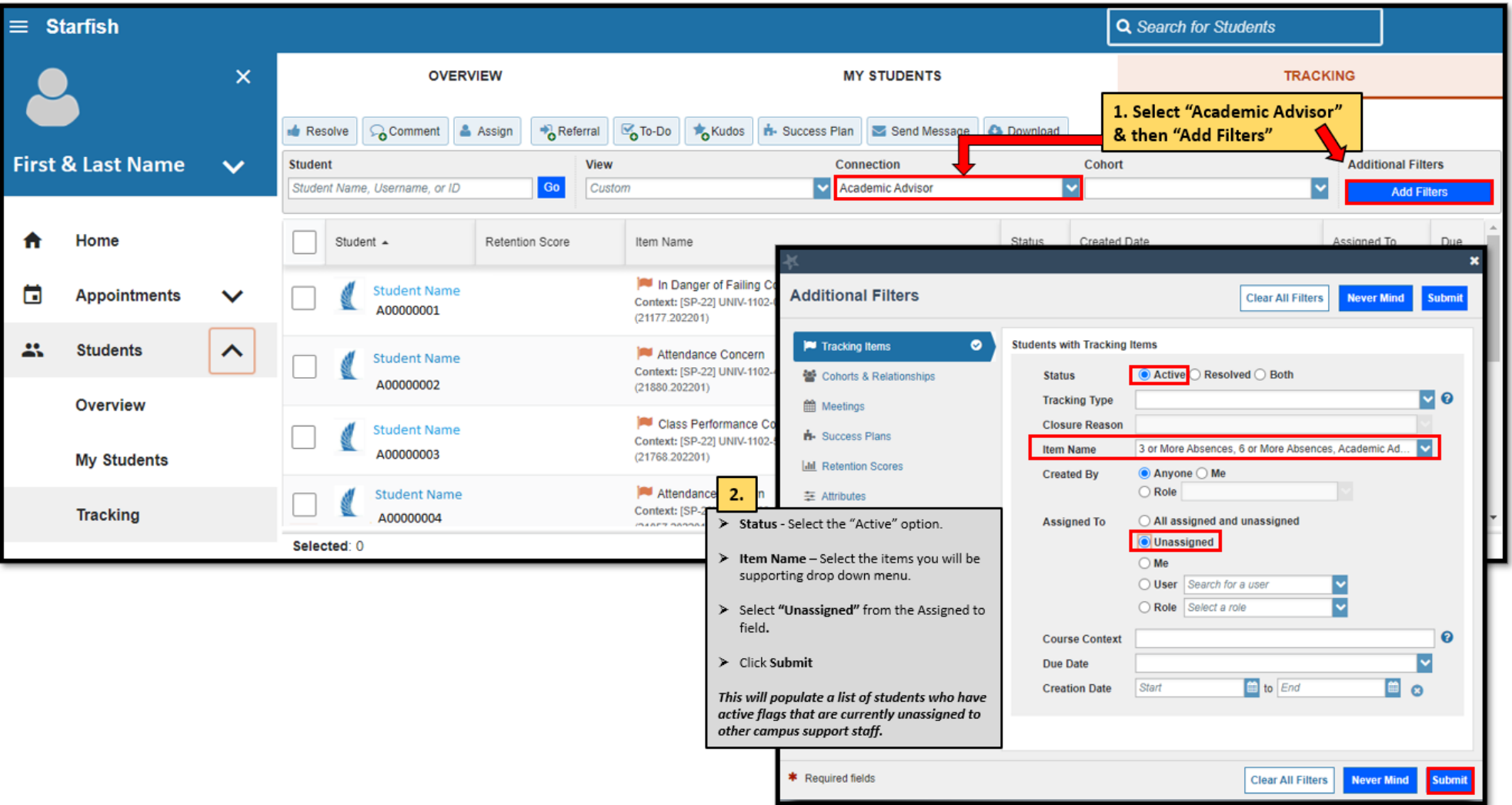   - The next section will show how to filter the tracking list for "**active**" flags that are "**unassigned**" to other support personnel.

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

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.

1. **In the Academic Advisor Connection view, apply an additional filter to your tracking list, by clicking the "Add Filters" button.** Add Filters

2. **From the "Additional Filters" menu, select Tracking Items and filter by Item Name and Unassigned**

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** [Comment] **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 [Submit]. This process will allow you to document your outreach in Starfish as well as email the students all at once.
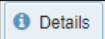
In instances where Flag outreach is done outside of the Starfish System (e.g., phone calls or emails through outlook), the process detailed below can be used to document your outreach attempts.
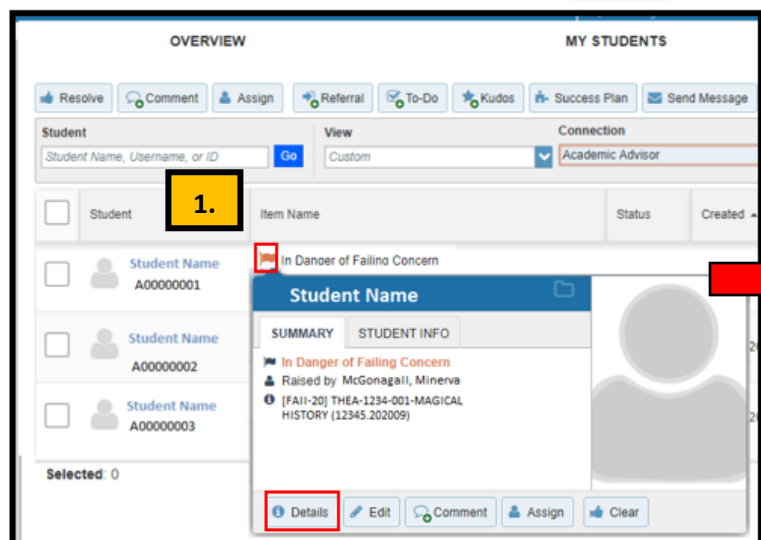

3. Use this box to send a general message to the student's islander email.

Create Note

Subject: Starfish Flag

* Note:
Hello,
I'm reaching out to offer assistance regarding the 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 ← Yes, this will ensure the student receives your message.
☐ Send copy of comment to flag raiser ← No. The Instructor will get notified when you clear the flag and close the loop.

* Required fields

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 🛈 Details

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

   ➢ After reading additional notes made by the instructor, you can hover over the flag icon & click the Comment 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 Submit. This process will allow you to document your outreach in Starfish as well as email the student all at once.

   ➢ Optional

   ➢ Yes, this will ensure the student receives you message.

   ➢ Not yet, until you receive more information

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.	

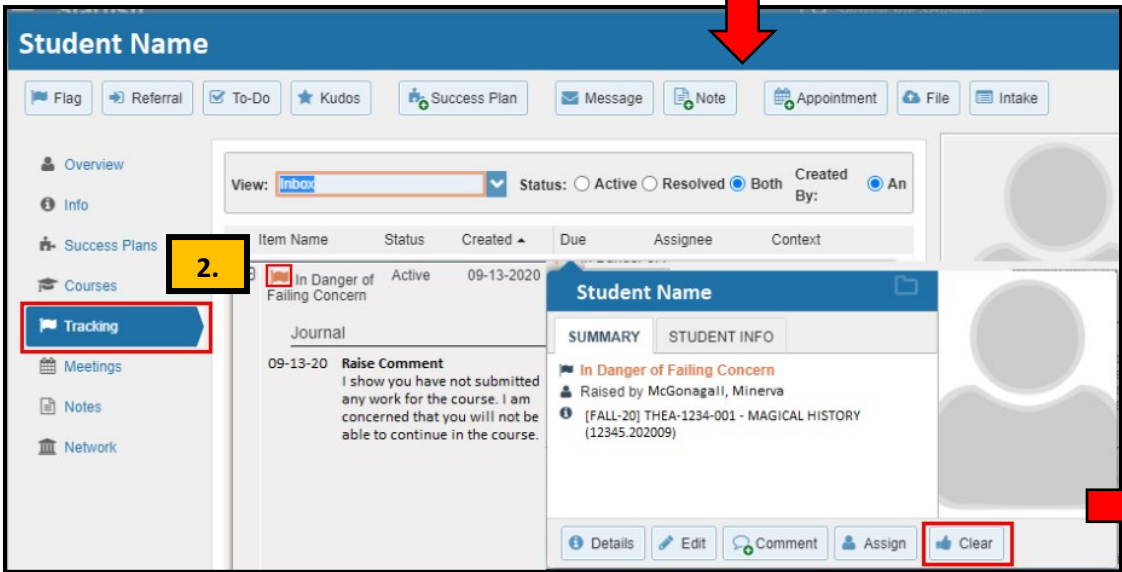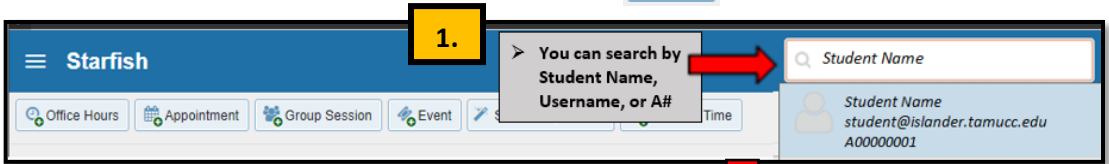| Neutral	The concern is no longer relevant (e.g., withdrew)
➢ **Select this reason if:** You find the concern noted is no longer relevant (e.g., Student has dropped the course or has withdrawn from the University).	

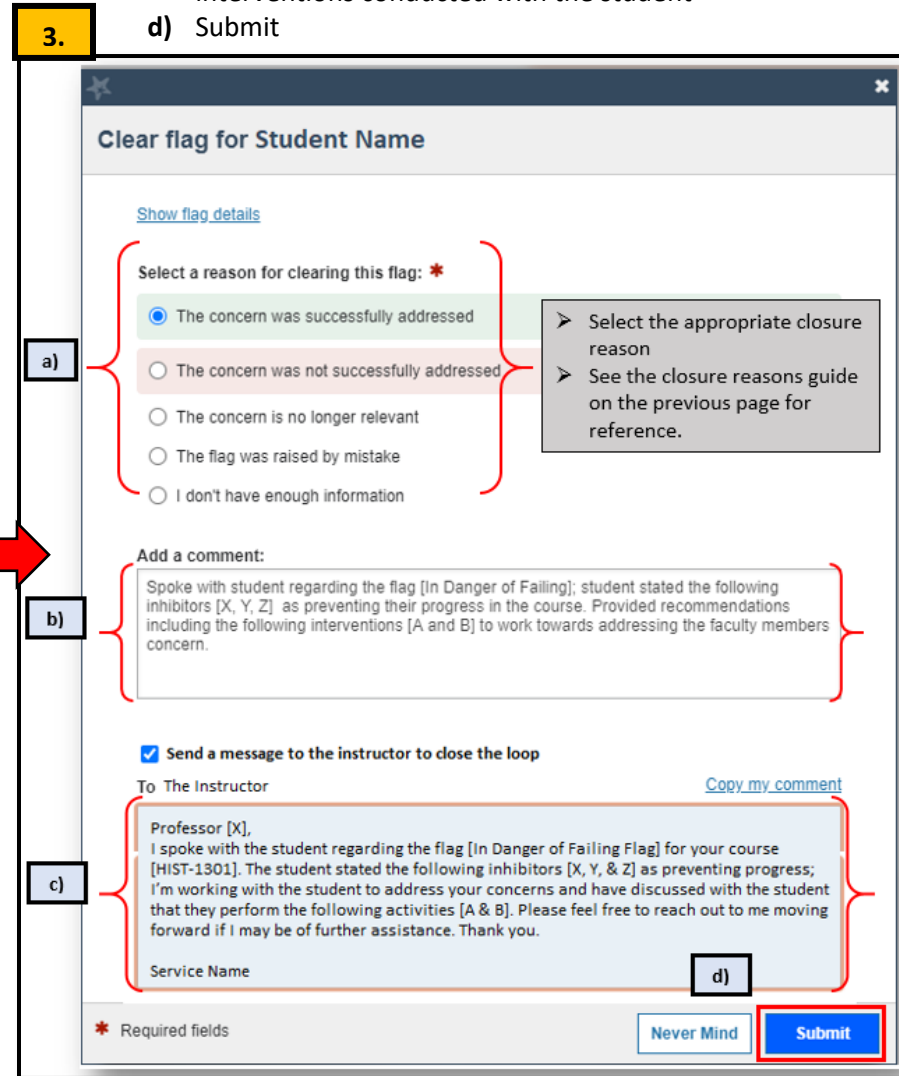| Neutral	The Flag was raised by mistake
➢ **Select this reason if:** You find that the concern was created by mistake (e.g., Faculty member stated the tracking item was raised in error)	

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 👍 Clear

1.

Starfish

☰ **Starfish**

🔍 Student Name

🕐 Office Hours 📅 Appointment 👥 Group Session ⭐ Event ✏️ S... ...Time

> You can search by Student Name, Username, or A#

Student Name
student@islander.tamucc.edu
A00000001

2.

Student Name

🚩 Flag ➡️ Referral ☑ To-Do ⭐ Kudos 🏫 Success Plan ✉️ Message 📝 Note 📅 Appointment 📁 File 📋 Intake

- 👤 Overview
- ℹ️ Info
- 🏫 Success Plans
- 🎓 Courses
- 🚩 **Tracking**
- 📅 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			

Student Name 📁

SUMMARY   STUDENT INFO

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.

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

ℹ️ Details ✏️ Edit 💬 Comment 👤 Assign 👍 **Clear**

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

3.

Clear flag for Student Name   ✖

Show flag details

Select a reason for clearing this flag: ✱

a)
- ⚫ 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 reasons guide on the previous page for reference.

Add a comment:

b)
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

c)
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

d)

✱ Required fields   Never Mind   **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 of 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**