

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.

Contents

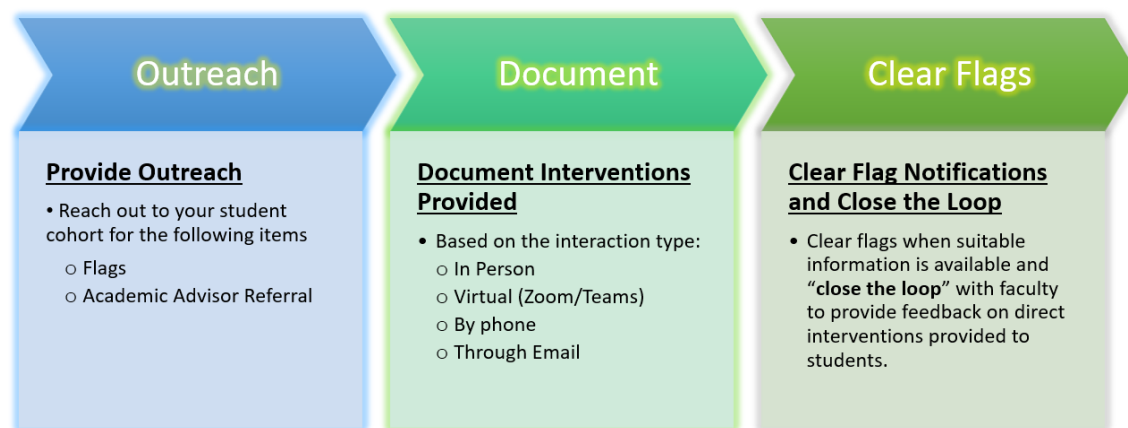
- ✓ Login to Starfish
- ✓ Search for your Flagged Students
- ✓ Filter Tracking List by Sport
- ✓ Assign Tracking Items to You
- ✓ Providing Outreach to Multiple Students at Once
- ✓ Providing Personalized Outreach to a Unique Student
- ✓ Closure Reason Guide
- ✓ Resolving or Clearing a Single Flag
- ✓ Resolving or Clearing Multiple Flags at Once



Tracking Item Management Process (General Overview)

First Intervention Effort

1. [Login to Starfish](#)
2. [Navigate to your Active Tracking Item List](#)
3. [Filter the List Using the “Student Athletes” Cohorts](#)
4. [Assign your Cohort’s Active Tracking Items to Yourself](#)
5. Perform Outreach
 - Could be Bulk Outreach with a General Message to Multiple Students at Once
 - Use General Flag Outreach Templates
 - Could be Personalized Outreach to a Unique Student
 - Use Personalized Flag Outreach Templates
6. Record Outreach Date Range



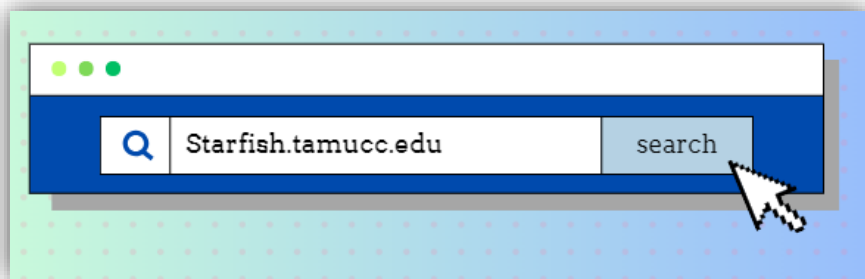
Follow-Up Intervention Efforts

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

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

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 login dialog box. At the top, there is a question mark icon and the text '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 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. Below the logo, there is a 'Device:' label and 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



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

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

3. Select “All My Students” under the Connection field

1.

Starfish

Search for Students

OVERVIEW MY STUDENTS TRACKING ZOOM IN ATTENDANCE PROGRESS SURVEYS



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



Student View Connection Cohort Additional Filters



Student Name, Username, or ID Go Inbox All My Students Add Filters



Home Appointments Students Overview My Students Tracking My Success Network Upcoming

Student Retention Score Item Name Status Created Date Assigned To Due

 Student Name A00000001  Class Performance Concern
Context: [SP-22] ENGL-1301-350 - COMPOSITION I (21121.202209) Active 02-18-2022

 Student Name A00000002  Class Performance Concern
Context: [SP-22] ENGL-1301-350 - COMPOSITION I (21121.202209) Active 07-2022

 Student Name A00000003  Class Performance Concern
Context: [SP-22] NURS-3614-001 - FUNDAMENTALS OF NURSING CARE (21121.202201) Active 02-09-2022

 Student Name A00000004  3 or More Absences
Context: Student has three or more unexcused absences in the course [SP-22] ENGL-1301-202 - COMPOSITION I. Active 02-12-2022

First Previous 1 Next Last

Selected: 0

Displaying 1 - 4 of 4 Items

3.

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

Select the “All My Students” connection to view all students that are connected to you.

Filter Tracking List by Sport Assignments

1. Open the Starfish Navigation menu (hamburger button) located at the top left of the home page
2. In the Starfish Navigation Menu, select "Students", then the "Tracking" tab.
3. Use the Select "All My Students" under the Connection field

≡ Starfish

1.

The screenshot shows the Starfish Tracking interface. On the left is a navigation menu with a hamburger button (labeled 1.) and options: Home, Appointments, Students (labeled 2.), Overview, My Students, Tracking (highlighted with a red box), My Success Network, and Upcoming. The main area has tabs: OVERVIEW, MY STUDENTS, TRACKING (selected), ZOOM IN, ATTENDANCE, and PROGRESS SURVEYS. Above the tabs is a search bar "Search for Students" and a toolbar with buttons: Resolve, Comment, Assign, Flag, Referral, To-Do, Kudos, Success Plan, Send Message, and Load (labeled 3.). Below the tabs, there are filters for Student (text input), View (dropdown: Inbox), Connection (dropdown: All My Students), Cohort (dropdown, highlighted with a red box), and Additional Filters (button: Add Filters). A table lists students with columns: Student (checkbox), Student Name, Retention Score, Item Name, and Status. A tooltip points to the Cohort dropdown: "You may use the 'Cohort' drop down menu to filter your student connection by Sport." A dropdown menu is open for the Cohort filter, showing a list of sports: Baseball, Cross Country, Current Student Athletes, Golf, Men's Basketball, Soccer, Softball, Tennis, Track, Volleyball, and Women's Basketball. The bottom of the page shows "Selected: 0" and "Displaying 1 - 4 of 4 Items".

Assign Tracking Items

Assigning Tracking Items to yourself helps remove those items from the share queue to help minimize overlap in outreach across support teams.

1. **Open the Starfish Navigation menu (hamburger button) located at the top left of the home page**
2. **In the Starfish Navigation Menu, select “Students”, then the “Tracking” tab.**
3. **Filter by “All My Students” under the Connection field and also by your Assigned Sport using the Cohort” field.**
4. **Select items by clicking the check box to the left of each item you want to assign**
 - If the items you plan to assign are listed on more than one page, click the arrow buttons to navigate from page to page. Items you selected on other pages will be included in your final selection. The count of items selected will display at the bottom of the list.
5. **Click Assign from the action bar at the top of the Tracking tab to open the Assign Item dialog**
6. **Select “Me” in the Assignee field and then click “Assign” to complete the assignment.**

1.

Starfish

Search for Students

OVERVIEW MY STUDENTS **TRACKING** ZOOM IN ATTENDANCE PROGRESS SURVEYS

Resolve Comment **Assign** Flag Referral To-Do Kudos Succ 3. Send Message Download

Student Student Name, Username, or ID View Inbox Connection All My Students Cohort Baseball; Cross Country Additional Filters Add Filters

Home Appointments Students Overview **My Students** **Tracking** My Success Network Upcoming

4. 5. 6.

Assign Item

* Assignee

☐ Unassigned ☒ **Me** ☐ Other Provider

Comment

1


Selected: 2


* Required fields Never Mind **Assign**

Displaying 1 - 4 of 4 Items

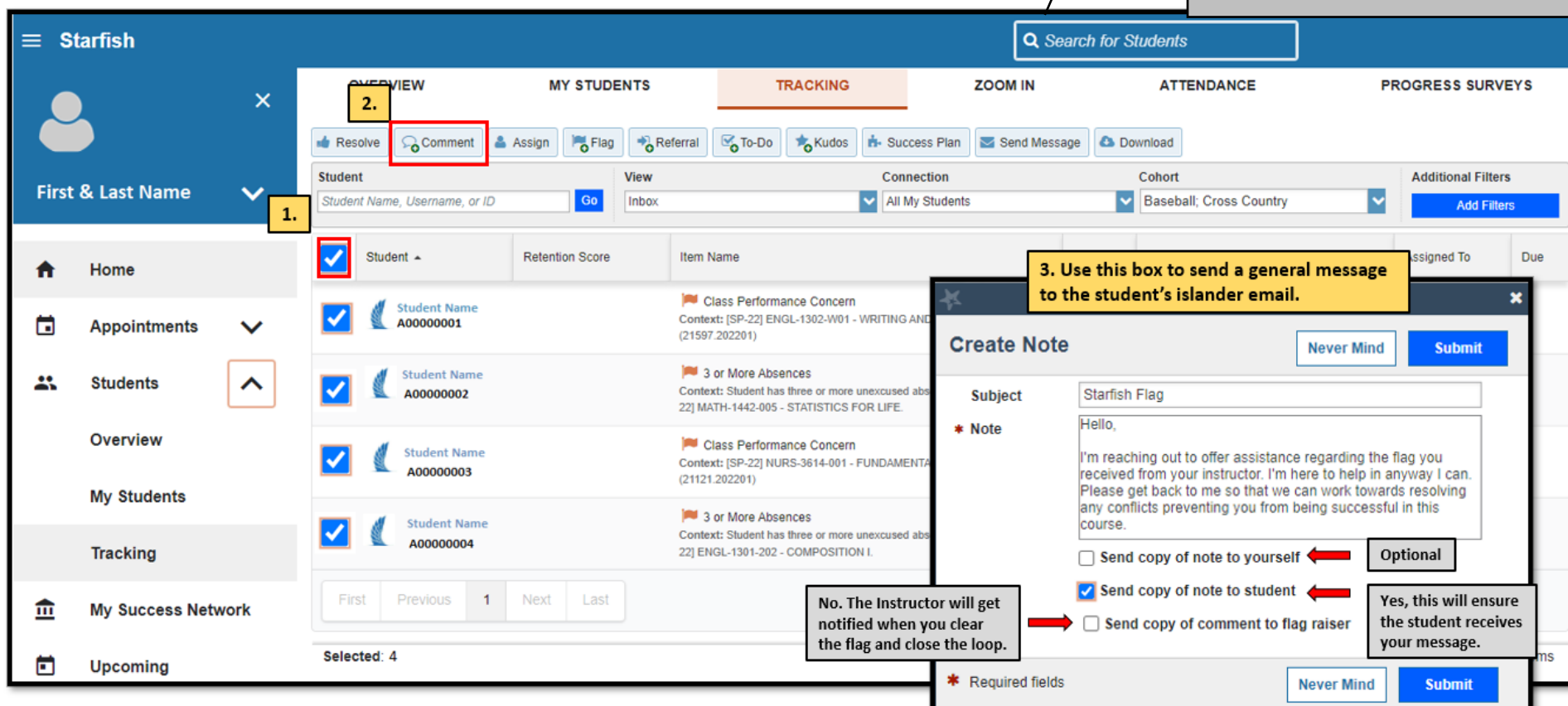
Providing Outreach to Multiple Students at Once

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

1. Click the “Select All” check box to select all students that meet your filtered criteria. You will notice at the bottom of the page the total number of students that have been selected.
2. Click the  button
3. Fill out the “Create Note” dialog box

- Treat this as an Outlook message (add Subject & Signature)
- In the “Note” section type a general message that is general for multiple students with various flag types.
- Click . This process will allow you to document your outreach in Starfish as well as email the students all at once.

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



The screenshot shows the Starfish system interface. The left sidebar contains navigation links: Home, Appointments, Students, Overview, My Students, Tracking, My Success Network, and Upcoming. The main area is titled 'TRACKING' and shows a list of students with columns for Student, Retention Score, and Item Name. A red box highlights the 'Comment' button in the top toolbar. A yellow box highlights the 'Select All' checkbox in the student list. A 'Create Note' dialog box is open, showing a form for sending a message. The dialog box has fields for Subject and Note, and checkboxes for 'Send copy of note to yourself', 'Send copy of note to student', and 'Send copy of comment to flag raiser'. A red arrow points from the 'Send copy of note to student' checkbox to a text box that says 'Yes, this will ensure the student receives your message.' Another red arrow points from the 'Send copy of comment to flag raiser' checkbox to a text box that says 'No. The Instructor will get notified when you clear the flag and close the loop.'

1. Select All checkbox

2. Comment button

3. Create Note dialog box

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

Optional

☐ Send copy of note to yourself

☒ Send copy of note to student

☐ Send copy of comment to flag raiser

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



Yes, this will ensure the student receives your message.

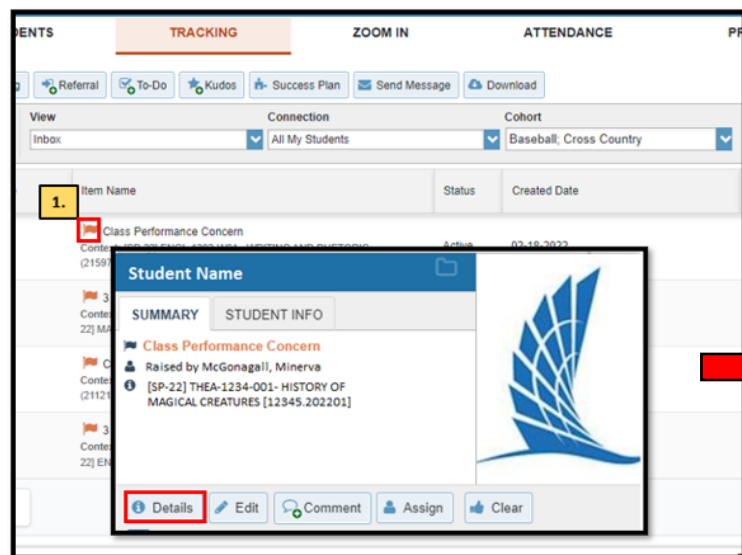
Required fields

Never Mind Submit

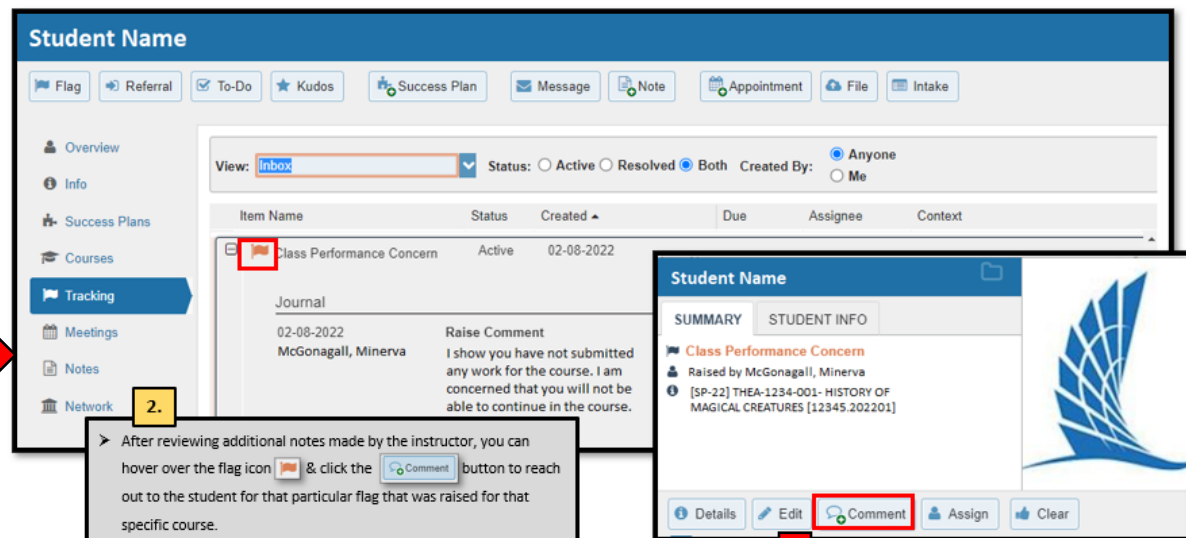
Providing Personalized Outreach to a Unique Student

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


- Hover of the Flag Icon  and click  Details

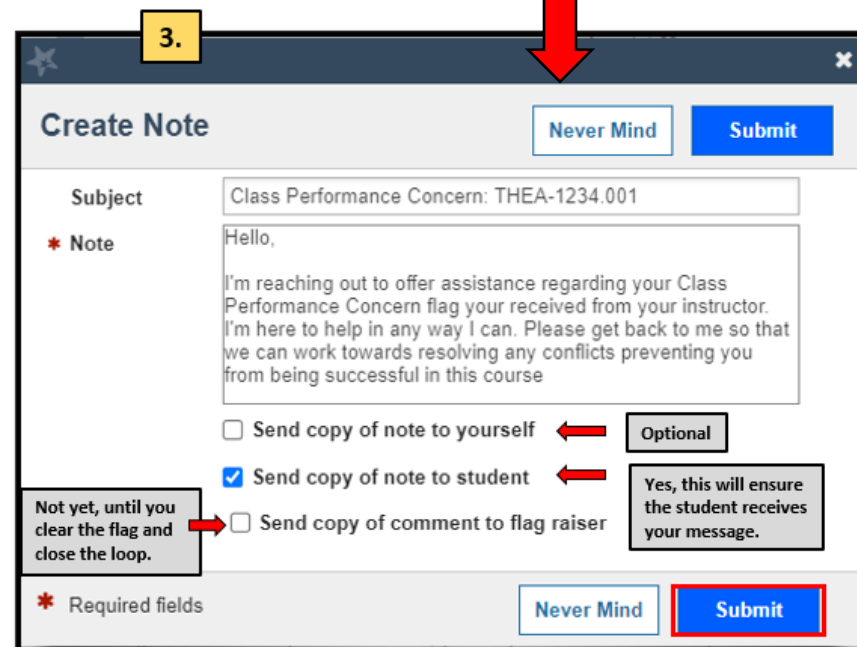


2. This action opens the Tracking tab within the Student Folder, from which you can view additional comments made by the item raiser.



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

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



The 'Create Note' dialog box is shown. The 'Subject' field contains 'Class Performance Concern: THEA-1234.001'. The 'Note' field contains a personalized message. The 'Send copy of note to student' checkbox is checked. The 'Send copy of comment to flag raiser' checkbox is unchecked. A red arrow points from the 'Comment' button in the previous screenshot to this dialog box.

Not yet, until you clear the flag and close the loop.

Optional

Yes, this will ensure the student receives your message.

Required fields

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).

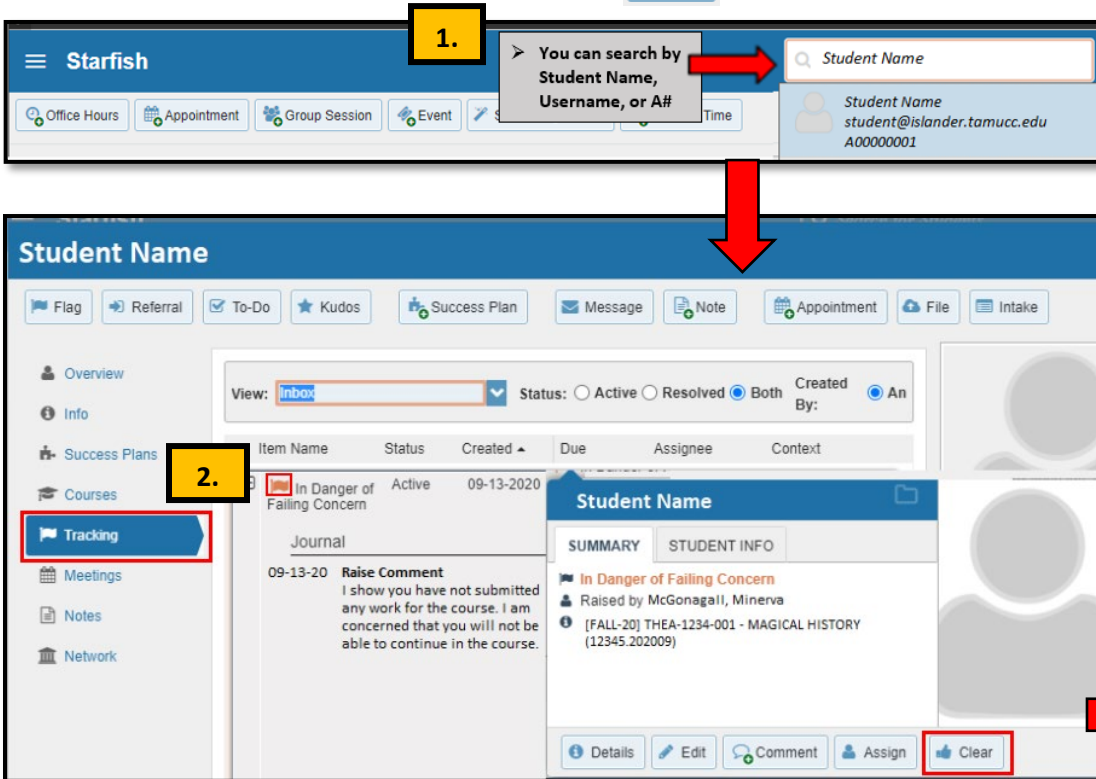
Neutral

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

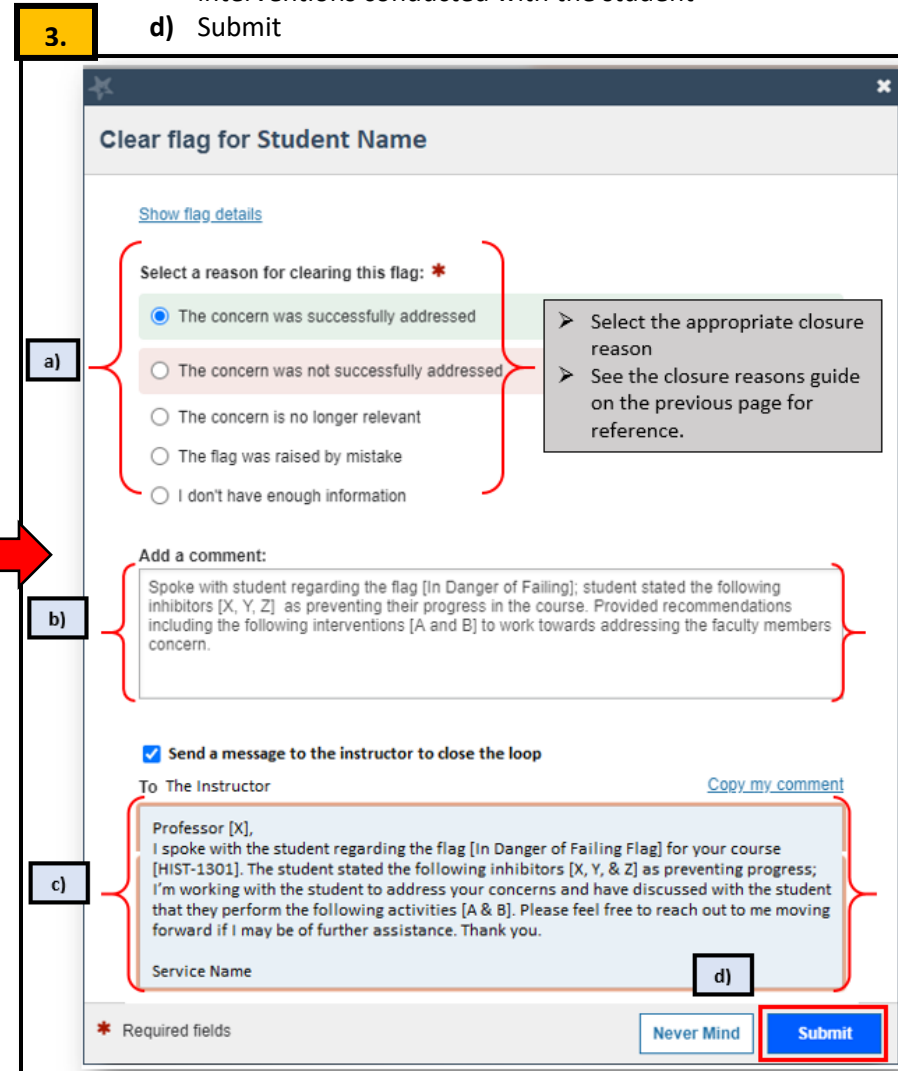
1. Search for the student whose items you are wanting to clear.
2. Navigate to the Tracking Tab within the student's folder
 - Hover of the Flag Icon  and click 



The screenshot shows the Starfish interface. At the top, a search bar is labeled "You can search by Student Name, Username, or A#". A red arrow points from the search bar to the "Student Name" field. Below the search bar, a red arrow points from the "Tracking" tab in the left sidebar to the "Clear" button in the bottom right corner of the student's folder.

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



The screenshot shows the "Clear flag for Student Name" dialogue box. It contains the following sections:

- Show flag details**: A link to view more information.
- Select a reason for clearing this flag:** A list of radio buttons:
 - ☒ 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:** A text area for adding a comment.
- Send a message to the instructor to close the loop**: A checkbox that is checked.
- To The Instructor**: A text area for sending a message to the instructor.
- Service Name**: A text area for entering the service name.
- Submit**: A blue button to submit the form.

Red arrows and labels (a, b, c, d) point to the respective sections in the dialogue box.

Resolving or Clearing Multiple Flags at Once

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

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

Starfish

First & Last Name

Home

Appointments

Students

Overview

My Students

Tracking

OVERVIEW

MY STUDENTS

Search for Student

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

Student: Student Name Go

View: Custom Connection: Academic Advisor

Student	Item Name	Status	Cre
<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Student Name A00000001 In Danger of Failing Concern Context: [FALL-20] ENGL-1301-350 - COMPOSITION I (54986.202009)	Active	08-2
<input checked="" type="checkbox"/>	Student Name A00000001 In Danger of Failing Concern Context: [FALL-20] MATH-1314-001 - COLLEGE ALGEBRA (55259.202009)	Active	08-2
<input checked="" type="checkbox"/>	Student Name A00000001 In Danger of Failing Concern Context: [FALL-20] HIST-1301-001 - U.S HISTORY TO 1865 (55258.202009)	Active	08-2

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