



EAB

Starfish Feature Update: Introducing Students Can Close To-Dos Without Review

April 2022



Starfish

Zoom Webinar Features



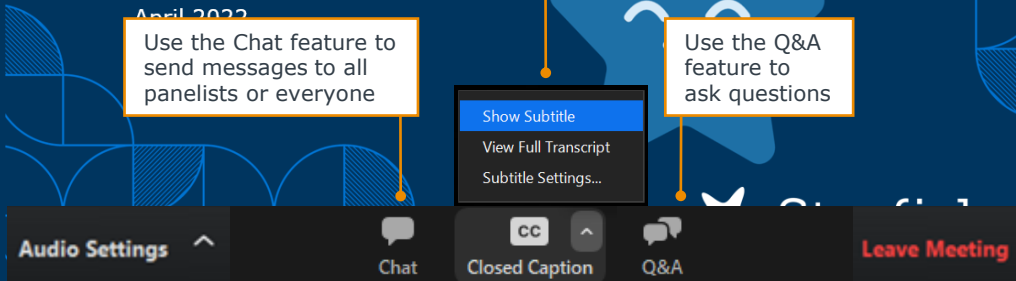
Starfish Feature Update: Introducing Students Can Close To Without Revi

April 2022

Use the Chat feature to
send messages to all
panelists or everyone

Enable Closed Captions
and Show Subtitle or
View Full Transcript

Use the Q&A
feature to
ask questions



Meet Your Presenters



Chelsea Hunt
*User Experience (UX)
Designer*



Elise West
Product Manager



Veronica Wooten
Consultant



Poll 1: Who Is With Us Today?



Select as many as you would like:

- ☐ Tenant Admin "I configure things in Starfish"
- ☐ Faculty/Staff "I work with students & use Starfish"
- ☐ Strategic Staff "I measure the success of Starfish usage & make institutional decisions"
- ☐ Other



If you are a Tenant Admin, log in to your test tenant so you can follow along when we discuss What's New.

Agenda

1 Feature Goals

2 Release Timeline

3 In Practice

4 What's New

5 Sneak Peek Q&A

6 Live Q&A



Feature Goals

SECTION

1



Institution

Help institutions use more To-Dos and Success Plans without burdening staff members



Students

Empower students to proactively close their To-Dos

What We Heard



Communication & Student Motivation and Action Students Can Close To-Dos

“

“We have so many ways we would/could use To-Do items, especially in Success Plans, if students were able to clear the flags themselves. I agree... that it would be ideal if this was configurable so that Admins could determine clearing capabilities for each tracking item”

Stephanie Bauschard, Associate Director University Advising Office
Rochester Institute of Technology

”

690

Partner voted
points for students closing
To-Dos

4

Focus group discussions
centered on Communication

17

Partners & Students
Interviewed



Hui-Ming Borgman

Provide ability for students to clear To-Dos

690 points

Delivered

Student perspective | Success Plans | To dos and Referrals



Would like to see students are able to clear their to-dos or submit a request to have it cleared (similar to the Request Approval in Degree Planner).



November 1, 2018 • 7 comments



Emily Salyards

Success Plans - Student Checklists

10 points

Under Point Threshold

Success Plans | To dos and Referrals



It would be nice to allow students to "check off" To-Do items on a Success Plan rather than having staff close those items. This would allow a little bit of autonomy on the student's part in navigating their program. Or there could be a new Student Checklist feature. This would be



January 15, 2020 • 0 comments

Starfish

Product Objectives



Interoperability

Strengthen and develop our interoperability capabilities, which will provide us with opportunities to support larger institutions and take advantage of additional functionality.



Communications

Smoother communication channels between faculty and students to enable faster responses to time-sensitive or urgent needs.



Visible Outcomes

Deliver proof of outcomes in a consumable format to our partners (i.e., the actions that are taken are yielding positive results).



Inclusive Data

Support our partners by addressing data sync issues, equity concerns around mislabeling race and gender, and making workflows smoother.



Release Timeline

SECTION

2

Release Timeline



Test

April 7, 2022

Available now!

Production

By Request

Available now! Contact
Starfish Support when you
are ready



In Practice

SECTION

3

The Student Experience

14

 Starfish

 Dashboard

 Calendar

Choose Date:

April 15, 2022



Su	Mo	Tu	We	Th	Fr	Sa
10	11	12	13	14	15	16
ALL DAY					Obtain your new student ID	
7 am						
8 am						
9 am						
10 am						



Friday, 04-15-2022

ALL DAY



TO DO

Obtain your new student ID

 Created by [Yolanda Gold](#) on 03-07-2022

-  Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain. [More](#)

[MARK AS COMPLETE](#)

Consider the Possibilities...



Onboarding

- Set up your Starfish Profile
- Complete Starfish Student Survey (Student Intake Form)
- Submit final transcripts
- Attend Student Engagement Fair
- Buy/rent course materials

Financial



- Submit your FAFSA
- Attend Personal Finance Workshop
- Sign Master Promissary Note
- Complete FAFSA Verification
- Provide proof of military service



Academic

- Attend Study Skills workshop
- Schedule a tutoring session
- Meet with your advisor
- Create an academic plan
- Register for next semester

Graduation



- Schedule degree audit meeting
- Submit application for graduation
- Order commencement apparel (cap and gown)
- Create alumni account with Career Services

Historical To-Dos Are Still a Thing...



16



Special Populations

Where a conversation may be necessary before clearing the To-Do.



Verification Needed

Completed items that may require verification by a staff member.



Next Step

Items that necessitate follow-up tasks for a staff member as part of a larger workflow.



Poll 2:

In which areas do you plan
to allow students to close
To-Dos?



Planning for Student Success



To-Do or Don't



Encourage Action
Promote Ownership
Minimize Outreach

Success Network



Create
View
Manage
Receive Notifications

Configurations



To-Dos
Message Templates
Request Help
Success Plans



Poll 3:
Do you intend
to update
Success Plans?



Going Live with Students Can Close To-Dos



1 **Configure and Test**

Train End-Users **2**

3 **Launch and Promote**

Training Students – Shifting Culture

Consider developing multiple ways of communicating about this new feature with your students.

Starfish Help Center

- ▶ Feature Overview
- ▶ Configuration Guidance

Starfish Core Office Hours

- ▶ Feature Focus: Students Can Close To-Dos
- ▶ Wednesday, April 27th at 2 PM ET / 11 AM PT



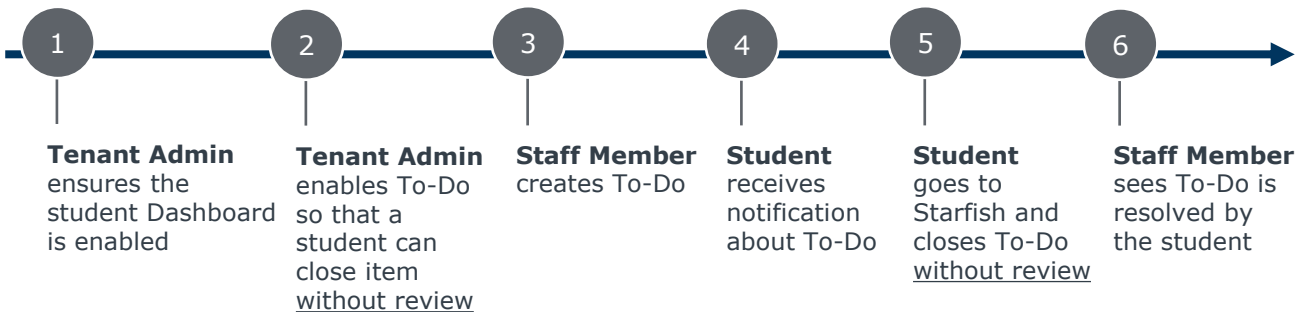
What's New



SECTION

4

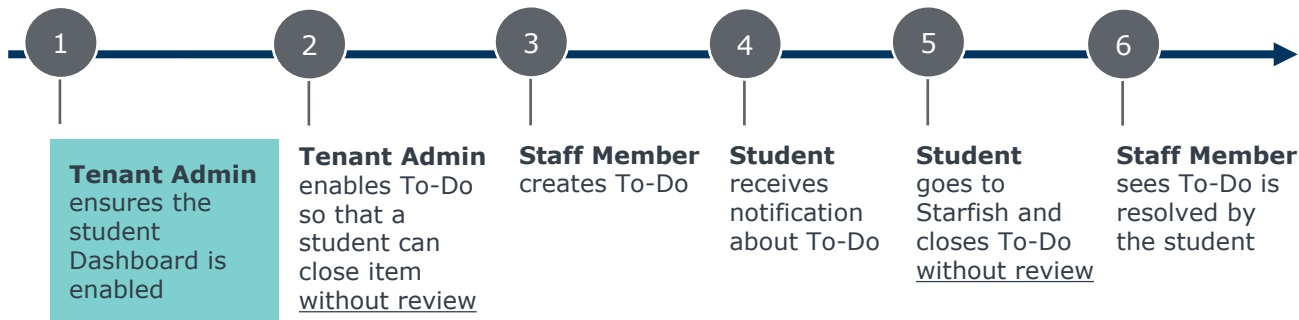
Here's the End-to-end Workflow



Tenant Admin Ensures Dashboard Is Enabled



24



Enable Student Dashboard

25

Starfish Search for Students

Data & Analytics

Feature Configuration

- Appointment Types
- Custom Intake Questions
- Degree Planner
- Flag Thresholds
- Kiosks
- Note Types
- Progress Surveys

Student View

- Success Plan Types
- Success Score
- Tracking Rules
- User Profile

Message Templates

Reports

Student View

☒ Show the Dashboard to students

Choose landing page for all students:

☒ Dashboard

☐ My Success Network
This is automatically selected if you do not display the Dashboard.

Show these items on the Dashboard:

- ☒ Calendar
Displays appointments/group sessions, assignments, course sections, and notifications with due dates.
- ☒ Notifications
Displays flags, referrals, and to-dos that are visible to students.
- ☒ My Connections
Displays all My Connections.
- ☒ My Services
Only displays My Services (excludes Other Services).

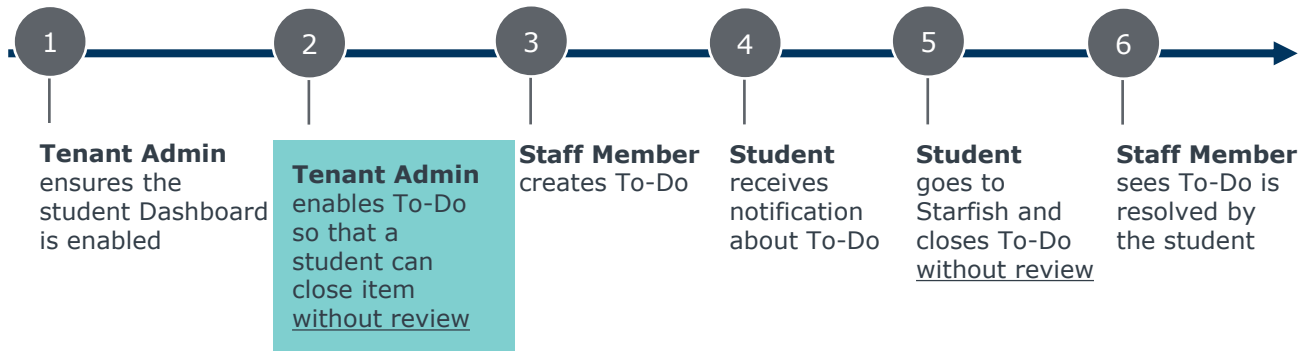
[CANCEL](#) **SAVE CHANGES**

Must enable Calendar or Notifications widget

Tenant Admin Enables To-Do



26



Create New Tracking Rule (or Copy One)

27

Starfish Search for Students

Terms
Silent Mode
SMTP Configuration
Help Desk Information

Integrations
Users & Roles
Data & Analytics
Feature Configuration
Appointment Types
Custom Intake Questions
Degree Planner
Flag Thresholds
Kiosks
Note Types
Progress Surveys
Request Help
Reserve Time Categories
Services
SpeedNotes
Student Intake
Student View
Success Plan Types
Tracking Rules

Tracking Rules

Flag Rule To-Do Referral Kudos Bulk Clear Tracking Items Closure Reason Settings

Modify To-Do: Obtain your new student ID Details Raise Options Privileges

* **Name** Obtain your new student ID

* **Description** Raise this intervention if a student needs to get their student ID

* **Status** ☒ Enabled ☐ Disabled

☒ Disclosable under FERPA ?

* Required fields

You cannot edit an existing rule to make it student closeable!

Never Mind Next >

Tools

playing Rules 1 - 1 of 1

Allow Due Dates and Use New Raise Option

Create To-Do

DetailsRaise OptionsPrivileges

Cohorts

Do not add any cohorts if you intend to use this tracking item for progress surveys.

☐ Comments Required ?

☒ Allow Due Dates ?

Student Closure Actions

☐ Students cannot close this item

☒ Allow students to close this item

If selected and students have the view privilege, students can resolve items. Students can't comment when closing.

Course Context ?

☒ Selection of course context is optional

☐ Require selection of a course context

☐ Don't allow selection of a course context

Default Creation Comment

Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain a new student ID.

Never Mind

< Back

Next >

Check the Allow Due Dates box!

After saving the Tracking Rule, this selection becomes read only.

Set Up Privileges

29

Modify To-Do: Obtain your

Role User Create

Roles and Users

Academic Advisor

Student

Instructor

Program Advisor

Permission only applies to user

Permission applies to all users

Add/Edit User

User Student

Privileges

- ☐ Create
- ☒ View
- ☐ Manage ?
- ☒ Email

Select Email Templates ?

Raise Email Student Closeable To-Do

Past Due Email Past Due To Do Template

* Required fields

Never Mind Submit Finish

Update Email Templates

30

 ✕

Create Message Template

PropertiesHeaderMessage

*** Email Message Template**

B I U |  |  |  |  |  |  |  </>

Hi ,

I have created the following To-Do for you: 

[Log in now](#) to learn more about the To-Do and let me know when you've completed it.

Best wishes,



SMS Message Template

Text messages should contain fewer than 160 characters. Lengthy templates and those with variables/fields may be displayed as multiple messages on some phones. All links will be shortened when sending texts in order to use fewer characters.

 |  |  | 

You have a new To-Do. [Log in now](#) to view & mark it complete

160 of 160 characters

 You cannot update links directly in the editor. To modify a link, you must remove and re-add via hyperlink button.

*** Required fields**

Never Mind < Back Finish

Use the New Internal Link Option

31

Add a link

Use external links for links to content outside of Starfish. Internal links are available for snippets and some templates and allow you to link to Starfish content.

EXTERNAL **INTERNAL**

Choose an action:

View student Dashboard notifications [CLEAR](#)

i The Dashboard Notifications widget should be enabled; otherwise, this link will go to the Dashboard. If the Dashboard is disabled, this link will go to the My Success Network page.

[← BACK](#) **FINISH**

If You Are Using Success Plans: Tip #1

32

Edit Plan Type

Properties | Default Properties | Default Items | Permissions

Properties

* **Name**

Description

☒ **Enabled**

* Required fields

Never Mind Next >

In the Name and/or Description, explain whether students can close any items.

Students will not see this information.

Success Plan Tip #2

33

Include Due Dates for each item so staff members have them prepopulated.

★

Edit Plan Type

Properties

Default Properties

Default Items

Permissions

Default Items

Specify the default tracking items for this type of plan. Providers will be able to add, edit or delete items from the plan when they create one for a student. However, adding default items will make it easier for providers to create more effective plans with less effort.

* Tracking Item:

Obtain your new student ID

Due Date:

5

days after item creation

Specific Recommendation:

Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain a new student ID.

Update Item

Never Mind

Obtain your new student ID

Due Date: 5 days after creation

Go to [starfishu.edu/studentID](https://www.starfishu.edu/studentID) and complete the required steps. Note that it can take up to a week to obtain a new student ID.

↑

↓

☑

Set up your Starfish Profile

Due Date: 7 days after creation

✎

✖

↑

☑

Complete Starfish Student Survey

Due Date: 10 days after creation

✎

✖

Never Mind

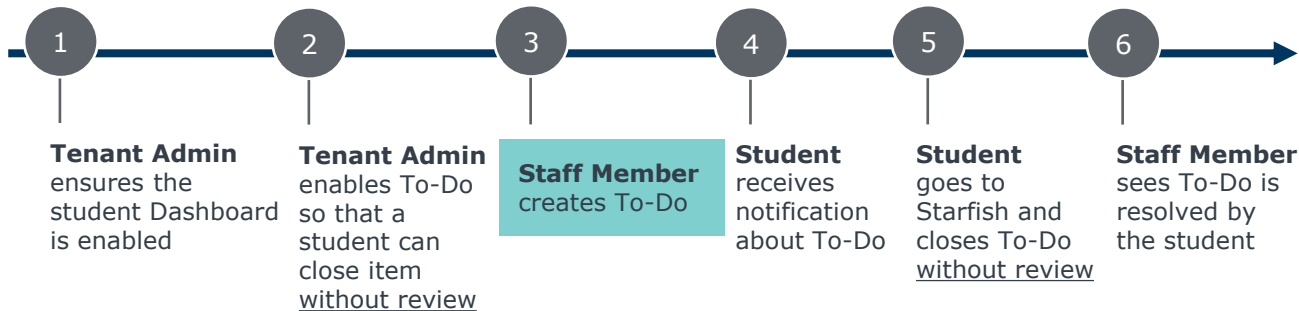
< Back

Next >

Staff Member Creates a To-Do



34



Staff Member Creates a To-Do

Create To-Do for Harper Collins

Never MindSave

★ To-Do

Obtain your new student ID

▼

Course Context

No Course

▼?

Due Date

04-15-2022

Comment

Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain a new student ID.

🔒 Student View: The student can view this item and the notes entered above. The student can resolve this item via the student's Dashboard.

🔒 Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Instructor
- Academic Advisor
- Program Advisor

★ Required fields

Never MindSave

Include a Due Date!

🔒 Student View: The student can view this item and the notes entered above. The student can resolve this item via the student's Dashboard.

🔒 Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Instructor
- Academic Advisor
- Program Advisor

Or Adds a Success Plan

Add Success Plan for Harper Collins Never Mind Submit

*** Plan Type**

*** Plan Name**

Overview ?

Custom Action Plan
A plan with minimal defaults that end users can customize

Onboarding Plan - Student Closeable
All items in this onboarding plan can be closed by the student.

*** Tracking Item** Select a tracking item...

Due Date

Course Context Select a Course...

Specific Recommendation

Add Item Never Mind

No Tracking Items

*** Required fields** Never Mind Submit

Explains that items are closeable by students only if the Tenant Admin has set it up that way!

Remember the Due Dates on Success Plans!

37

Add Success Plan for Harper Collins Never Mind Submit

* **Plan Type**

* **Plan Name**

Overview ?

* **Tracking Item**

Due Date

Course Context

Specific Recommendation

Add Item Never Mind

☒ **Obtain your new student ID**
Due Date: 04-18-2022
Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain a new student ID.

☒ **Set up your Starfish Profile**
Due Date: 04-20-2022

☒ **Complete Starfish Student Survey**
Due Date: 04-23-2022

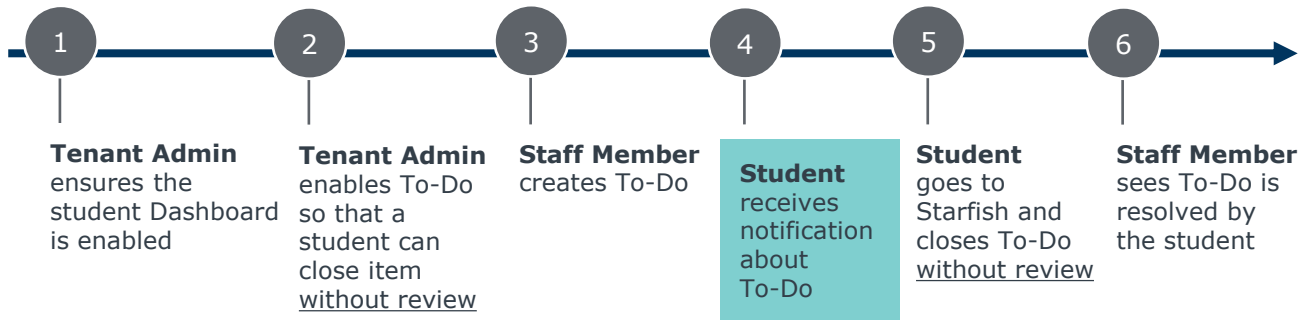
* Required fields Never Mind Submit

Remember
the
Due Dates for
each To-Do!

Student Receives Notification About To-Do



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Notification Contains Direct Link

[Tenant 20000000004] New To-Do: Obtain your new student ID



ygold@hobsonsdev.com

To West, Elise; trap.starfish@gmail.com



6:35 PM

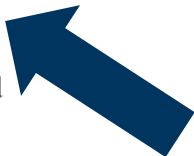
CAUTION (EXTERNAL EMAIL): Do not click links or open attachments unless you recognize the sender. Use the "Report Phishing" button to report suspicious messages.

Hi Harper,

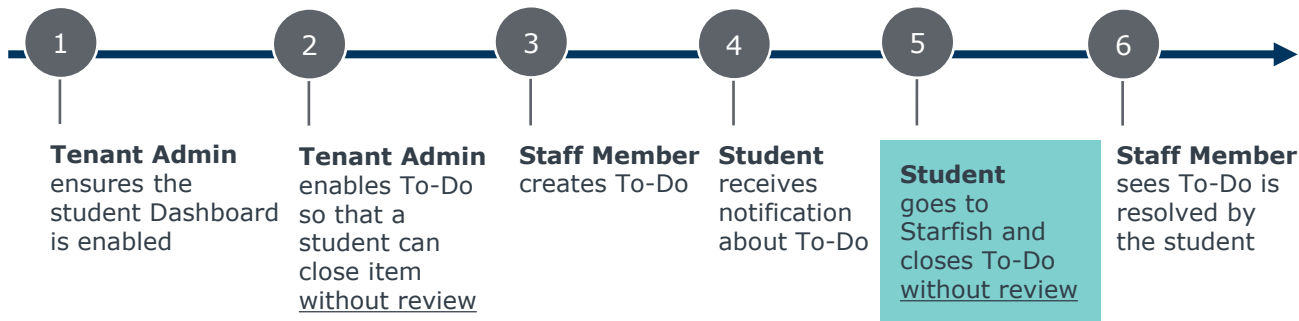
I have created the following To-Do for you: Obtain your new student ID

[Log in now](#) to learn more about the To-Do and let me know when you've completed it.

Best wishes,
Yolanda Gold



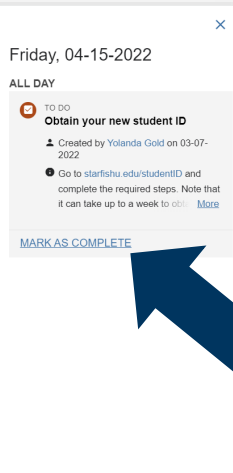
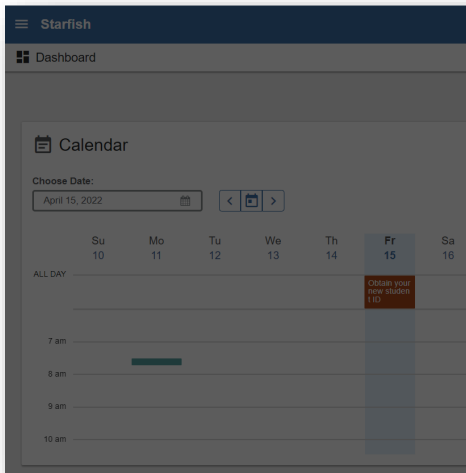
Student Goes to the Starfish Dashboard



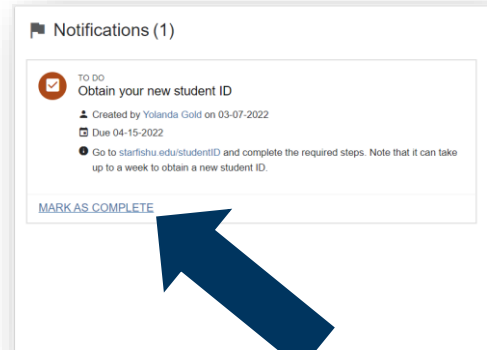
Student Sees MARK AS COMPLETE Option

41

- Calendar widget



- Notifications widget



Student Opens the Mark Item Complete Drawer

42

- Creator's name is in the intro & item details
- Required choice of two completion options
 - I completed this item!
 - I don't need to do this item.
- Request Help available if enabled

Think through your Request Help options to ensure students understand which Request Help option to select if they need assistance with a To-Do.



Mark Item Complete

Yolanda Gold and other connections will see that you took action on this item. After you submit it, the item will be removed from your dashboard.

Item being marked complete:



TO DO

Obtain your new student ID

Created by Yolanda Gold on 03-07-2022

Due 04-15-2022

Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain a new student ID.

[Less](#)

*Mark item complete because:



I completed this item!



I don't need to do this item.

Neither of these options feel right? We're here to help. [Request Help](#)

[CANCEL](#)

[SUBMIT](#)

Student Submits

43

Mark Item Complete

Yolanda Gold and other connections will see that you took action on this item. After you submit it, the item will be removed from your dashboard.

Item being marked complete:



TO DO

Obtain your new student ID

Created by Yolanda Gold on 03-07-2022

Due 04-15-2022

Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to [More](#)

*Mark item complete because:



I completed this item!

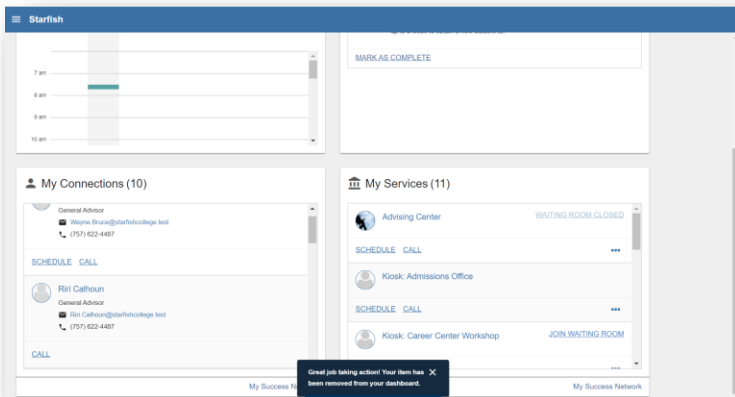


I don't need to do this item.

Neither of these options feel right? We're here to help. [Request Help](#)

[CANCEL](#)

[SUBMIT](#)

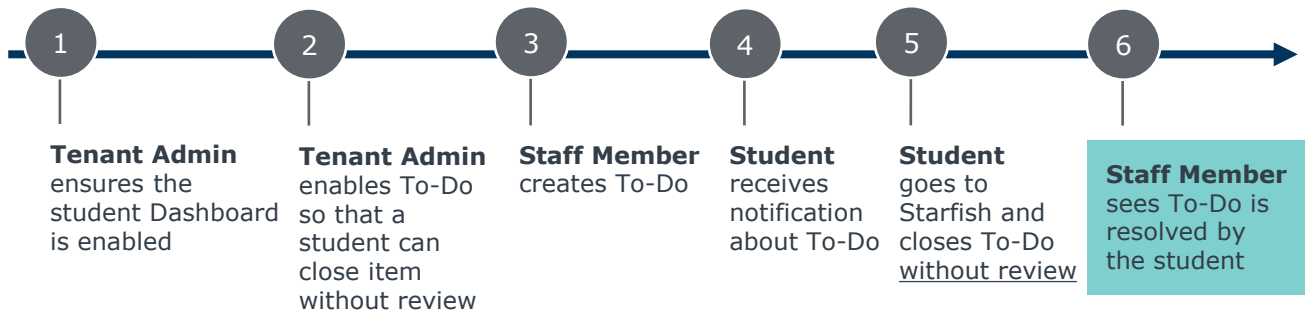


Great job taking action! Your item has been removed from your dashboard.

Staff Member Sees the Resolved To-Do



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Existing View on Staff Dashboard

45

The screenshot displays the Starfish Staff Dashboard interface. At the top, there is a navigation bar with the Starfish logo and a search bar labeled "Search for Students". Below the navigation bar, there are several tabs: Office Hours, Appointment, Group Session, Event, Scheduling Wizard, Reserve Time, and Record Attendance. A system announcement is visible, stating: "System Announcement: Fall course approvals are required for registration and must be in by the end of the month." Below this, there is a link for "Outstanding Progress Surveys: Microbiology II (SCI-BIOL202-600-2022011) 3 Question Flag Survey, more...".

The main content area is divided into several sections. On the left, there is a "My Services" section with a large blue arrow pointing to the right. It includes links for "Advising Center" (with contact information: 703-555-9876, advising@starfishcollege.test, and http://starfishcollege.test/advising) and "Waiting Room" (stating "Waiting Room is enabled for students. There are no students in the waiting room."). Below this is an "Appointments" section showing a list of appointments for the next 7 days. The appointments are:

- O'Neil, Ryan: Today at 9:15 am General visit, Location: Chrysler Hall, Room 301
- Gray, Jen: Today at 9:45 am Career advice, Location: Chrysler Hall, Room 301
- Sand, Emily: 03-10-2022 at 9:00 am Career advice, Location: Chrysler Hall, Room 301
- Coffee Break: 03-10-2022 at 9:30 am
- Sanders, Karen: 03-14-2022 at 7:00 am Weekly advising, Location: Chrysler Hall, Room 301

On the right, there is a "Recent Changes" section. It shows a list of changes, with the first one being "Completed To-Do: Collins, Harper: Obtain your new student ID: Yesterday". Below this, there is a profile card for Harper Collins, showing a photo and a summary of the change: "Obtain your new student ID", "Completed by Collins, Harper (Yesterday)", "Reason: I completed this item!", and "Due by 04-15-2022".

At the bottom right, there is a large circular gauge showing the total number of students, 69. The gauge is divided into three segments: blue (69 students total), green (15 with low risk success scores), and red (49 with moderate risk success scores). Below the gauge, there are three more segments: 05 with at risk success scores, 49 with moderate risk success scores, and 15 with low risk success scores. Each segment has a "View Students" link.

New View on Tracking Tab

46

 Starfish

Search for Students

OVERVIEWMY STUDENTSTRACKINGINTAKEZOOM INATTENDANCEPROGRESS SURVEYS (4)

ResolveCommentAssignFlagReferralTo-DoKudosSuccess PlanSend MessageDownload

Student

Student Name, Username,

View

Resolved by Student

Connection

All My Students

Cohort

Additional Filters

Add Filters

☐	Student	Success Score	Item Name	Status	Created Date	Resolved Date	Assigned To	Due
☐	 Collins, Harper hcollins4380	50	☒ Obtain your new student ID	Resolved	03-04-2022 by Gold, Yolanda	Today by Collins, Harper		04-15-2022

Harper Collins

SUMMARYSTUDENT INFO

☒ Obtain your new student ID
Completed by Collins, Harper (Yesterday)
Reason: I completed this item!
Due by 04-15-2022

Details

Edit

Comment



Updating the View dropdown resets the Additional Filters.

After View is in place, can add Additional Filters.

New View on Student Folder

47

Harper Collins

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

Overview

Info

Success Plans

Degree Planner

Courses

Tracking

Meetings

View: Resolved by Student

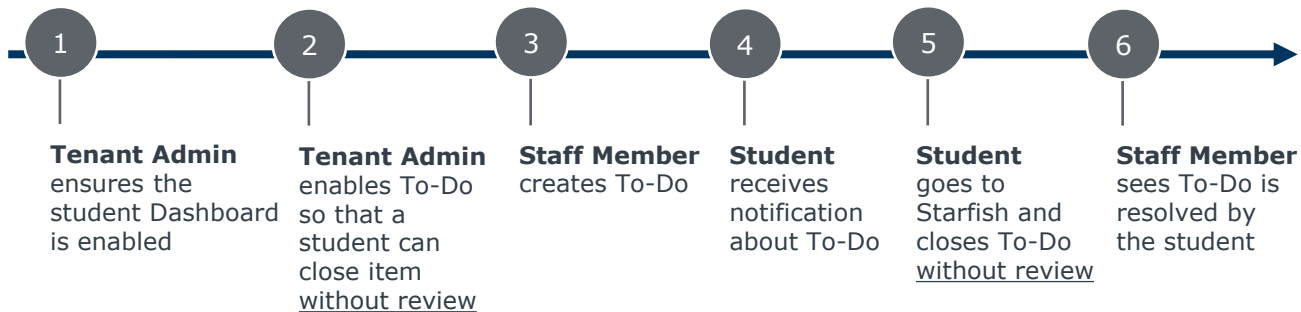
Status: ☐ Active ☒ Resolved ☐ Both Created By: ☒ Anyone ☐ Me

Item Name	Status	Created	Due	Assignee	Context
☒ Obtain your new student ID	Resolved	Yesterday by Gold, Yolanda	04-15-2022		
Journal					
Yesterday Gold, Yolanda	Create Comment Go to starfishu.edu/studentID and complete the required steps. Note that it can take up to a week to obtain a new student ID.				
Yesterday Collins, Harper	Complete Comments: Reason: I completed this item! <i>No comments provided.</i>				

That Is the End of the End-to-end Workflow



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Starfish Configuration Report



Tracking Items Report



Updated Starfish Configuration Report

50



	A	B	C	D	O
1	Name	Description	Item Type	Enabled?	Student Closure Actions
2	Obtain your new student ID	Raise this intervention if a student needs to get their student ID	TO_DO	Yes	Can Close
3	Re-evaluate Academic Plan	Students on academic probation are required to re-evaluate and adjust their academic plan to improve success outcomes. This must be done with the advisor and approved by the Retention Director.	TO_DO	Yes	Cannot Close
4	Visit health services	Raise this intervention if a student needs to provide state mandated medical records	REFERRAL	Yes	
5					
◀ ▶ Contents Tracking Rule Configurations Tracking Rule Permissions App ... (+) ⋮ ◀					

Updated Starfish Tracking Items Report

51

	A	H	J	R	V	W	X	Y	Z
1	Student	Item	Item Name	Clearer Name	Closure Reason	Closure Reason Category	Student Can Manage	Closed By Student	Student Closure Reason
2	Zhang, Xie	FLAG	Poor Attendance	Gold, Yolanda			N/A		
3	Mack, Emma	TO_DO	Create academic plan	Goldfinger, Auric	The task was completed	Positive	No		
4	Gray, Jen	TO_DO	Obtain your new stude	Goldfinger, Auric	The task was completed		Yes	No	
5	Lands, Rachel	TO_DO	Obtain your new stude	Lands, Rachel	I completed this item!	Positive	Yes	Yes	I completed this item!
6	Mack, Emma	TO_DO	Obtain your new stude	Mack, Emma	I dont need to do this item.	Irrelevant	Yes	Yes	I dont need to do this item.

Student Details
Raised Item Details
Cleared Item Details
Full Details
Top Five Dash
... +

► Are you allowing students to manage the right To-Dos?

► Are you raising helpful To-Dos?

► Are students closing To-Dos?

► How quickly are students closing To-Dos?



Sneak Peek Q&A



SECTION

5

Your Questions from the Sneak Peek (Part I)



1

Question 1

Can a notification go out when a student marks an item complete?

Answer 1

Yes. Same as current Clear email.

2

Question 2

When students clear a To-Do without review, can they select a Closure Reason or leave a Close The Loop Comment for the To-Do Creator?

Answer 2

Yes, students can select a closure reason. If students have comments, they should use Request Help.

3

Question 3

If a student raises a Request Help flag, will any information be added from the To-Dos?

Answer 3

No. There is no connection between the Flag and the To-Do.

Your Questions from the Sneak Peek (Part II)



4

Question 4

Will only To-Dos be able to be closed by students, or will Referrals and other tracking items have this capability?

Answer 4

Only To-Dos right now. If you would like other tracking items, submit ideas to Compass separated by tracking item type.

5

Question 5

I would like the To-Do icon changed to an 'open box' with no check mark. The check mark looks like the To-Do is already complete and causes confusion.

Answer 5

Great feedback! Submit to Compass so we can understand how important this update would be.

6

Question 6

How will student closed To-Do's show up in reporting? Is it possible to indicate specifically that an item is cleared by student rather than listing the name of the student as the closer?

Answer 6

The Tracking Items Report has a new column called Closed By Student that will have a Yes or No value for To-Dos that students can close.



Live Q&A

SECTION

6



Thank you for
joining us!

