



EAB

Starfish Feature Update: Introducing Students Can Close To-Dos With Review

September 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

Show Subtitle

View Full Transcript

Subtitle Settings...

Audio Settings ^

Chat

CC ^
Closed Caption

Q&A

Leave Meeting

Meet Your Presenters



Chelsea Hunt
*User Experience (UX)
Designer*



Elise West
Product Manager



Veronica Wooten
Services 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

September 8, 2022

Available now!

Production

By Request

Available now! Contact
Starfish Support

Will be released in late
December 2022/early
January 2023
(Exact date will be
announced)



In Practice

SECTION

3

The Student Experience



Without Review

To-Do Details



Completion Options



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

Escape Hatch



With Review

Explanatory Intro

Mark Item Complete

After you select **Request Review**, Yolanda Gold and other connections will see that you want to mark this item complete and someone will review it. If approved, this item will be removed from your dashboard.

Item being marked complete:



TO DO

Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

Due 09-22-2022

Learn more and take any required assessments at starfishu.edu/assessments

*Mark item complete because:



I completed this item!



I don't need to do this item.



I have another reason.

*Please share details

Required Comment

Updated Button Text

[CANCEL](#)

REQUEST REVIEW



Poll 2:

Has your institution already
started using student
closeable To-Dos in
production?



Consider the Possibilities...



Onboarding

- Set up your Starfish Profile
- Complete 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

Potential "With Review" Use Cases



Next Step

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



Verification Needed

Completed items that may require verification by a staff member.



Special Populations

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

Provide Guidance for Students with Review



Onboarding

- Set up your Starfish Profile
- **Complete 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

Additional Guidance for Special Populations



Onboarding

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

Financial



- **Submit your FAFSA**
- Attend Personal Finance Workshop
- **Sign Master Promissory 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

Planning for Student Success



To-Do



Prompt Action
Promote Ownership
Minimize Outreach
Encourage Engagement

Success Network



Create
View
Manage
Receive Notifications

Configurations



To-Dos
Message Templates
Request Help*
Success Plans
Cohorts

*For Without Review only



Poll 3:

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





Poll 4:

In which areas do you plan
to allow students to close
To-Dos WITHOUT review?



Key Considerations

Be thoughtful about implementing To-Dos with review



Capacity

Consider your institution's capacity to manage To-Do items that require review.

Are there special populations that require additional support?



Workflows

Develop the To-Dos workflow from creation to closure.

- What happens after the To-Do is created?
- Who takes action?
- When does this happen?



Training Staff

Consider how you will train your staff about workflows and how to monitor for items that need review.



Engaging Students

Consider how you will communicate with students regarding their role in following up on assigned items.

Launching Students Can Close To-Dos w/ Review



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1 Configure and Test

Train End-Users

2

3 Launch and Promote

Training Staff and Students –

Shifting Behavior

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

Consider the Impact –

Measure What Matters

Work with your Strategic Leader to identify relevant metrics to measure to determine impact of empowering students on your Student Success Initiatives.

Starfish Help Center

- ▶ Feature Overview
- ▶ Configuration Guidance

Starfish Core Office Hours

- ▶ Feature Focus: Students Can Close To-Dos With Review
- ▶ Wednesday, September 28th
2 PM ET / 11 AM PT



What's New



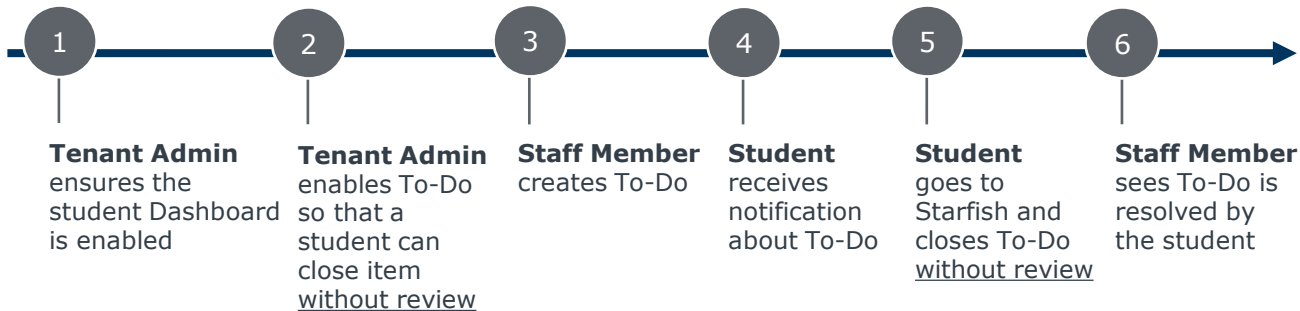
SECTION

4

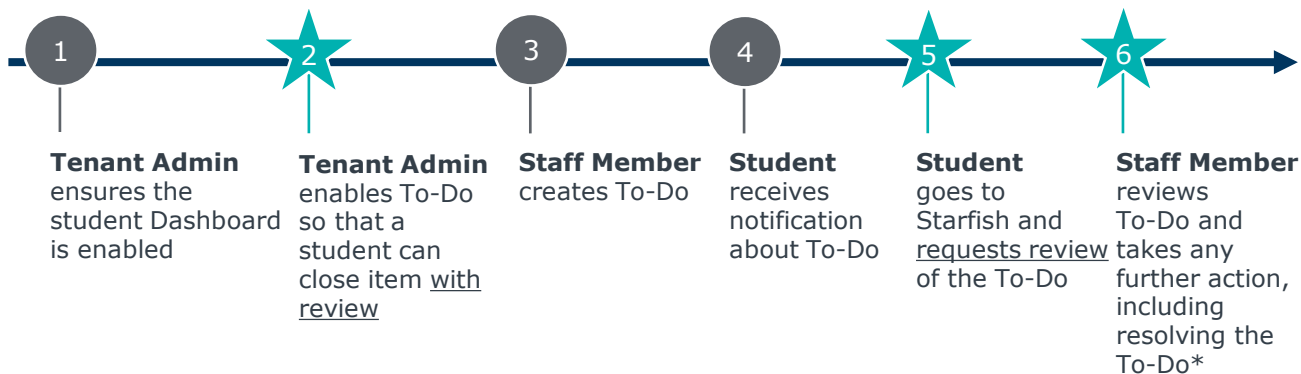
End-to-end Workflow (Without Review)



29



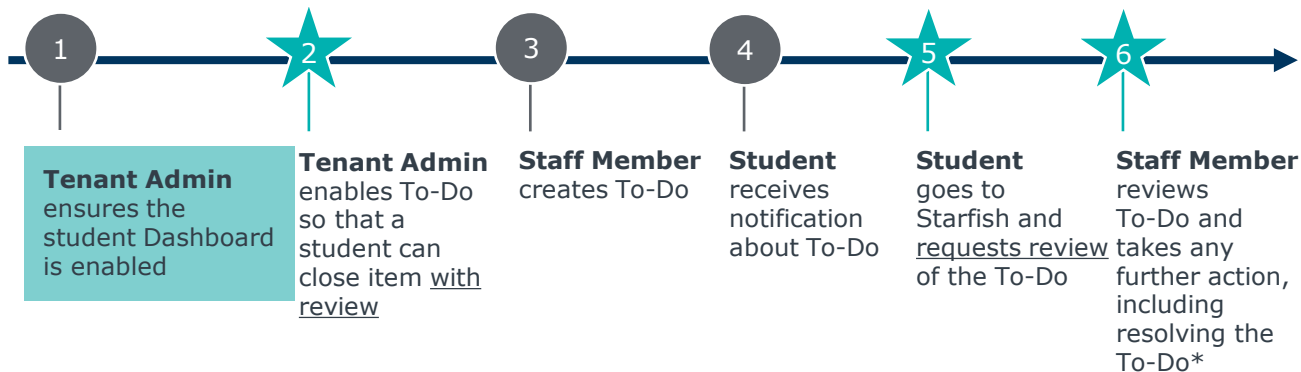
End-to-end Workflow (With Review)



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Tenant Admin Enables Student Dashboard



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Enable Student Dashboard

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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.

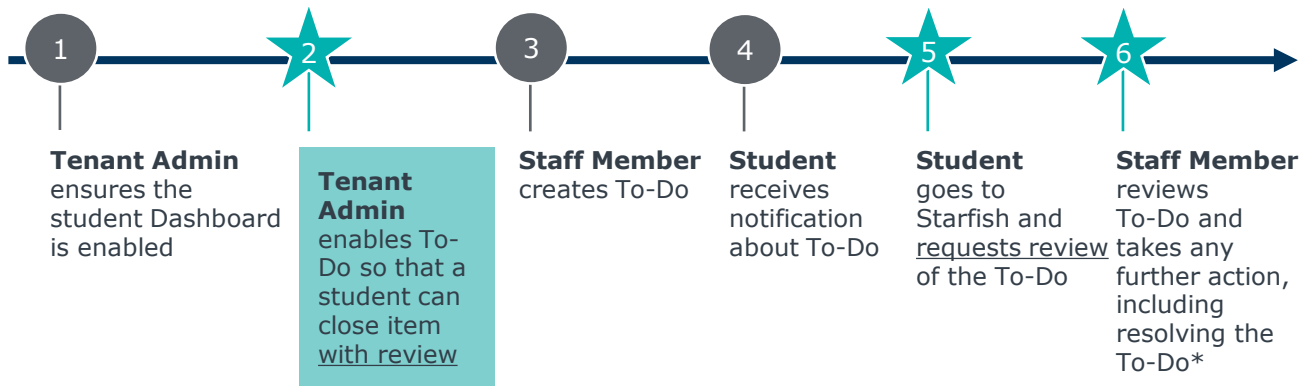
Show these items on the Dashboard:

- ☒ 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



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Create New Tracking Rule (or Copy One)

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The screenshot shows the Starfish application interface. On the left is a sidebar with a menu including: Help Desk Information, Integrations, Users & Roles, Data & Analytics, Feature Configuration (with sub-items: Appointment Types, Custom Intake Questions, Degree Planner, Flag Thresholds, Kiosks, Note Types, Progress Surveys, Request Help, Reserve Time Categories, Services, SpeedNotes, Tell Us About Yourself, Student View, Success Plan Types), Tracking Rules (highlighted), User Profile, and Message Templates. The top right has a search bar labeled 'Search for Students'. The main content area is titled 'Tracking Rules' and contains buttons for 'Flag Rule', 'To-Do', 'Referral', 'Kudos', 'Bulk Clear Tracking Items', and 'Closure Reason Settings'. A modal window titled 'Create To-Do' is open, showing tabs for 'Details', 'Raise Options', and 'Privileges'. The 'Details' tab is active and contains the following fields: 'Name' (with the text 'Complete Assessment Testing (Requires Review)'), 'Description' (with the text 'Raise this intervention if a student needs to complete their assessments. Once they have completed their assignment, they can request the staff close the To-Do'), 'Status' (with 'Enabled' selected), 'Disclosable under FERPA' (unchecked), and 'Required fields' (checked). Two blue callout boxes with arrows provide instructions: one points to the 'Name' field with the text 'When naming, consider whether the To-Do will be in Success Plans.', and another points to a copy icon in the 'Tools' sidebar with the text 'Use the copy option to make an existing Tracking Rule student closeable.' At the bottom right of the modal are 'Cancel' and 'Next >' buttons.

Starfish

Search for Students

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
- Tell Us About Yourself
- Student View
- Success Plan Types

Tracking Rules

User Profile

Message Templates

Tracking Rules

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

Create To-Do

Details Raise Options Privileges

* Name Complete Assessment Testing (Requires Review)

* Description Raise this intervention if a student needs to complete their assessments. Once they have completed their assignment, they can request the staff close the To-Do

* Status ☒ Enabled ☐ Disabled

☐ Disclosable under FERPA ?

* Required fields

Cancel Next >

Tools

When naming, consider whether the To-Do will be in Success Plans.

Use the copy option to make an existing Tracking Rule student closeable.

Allow Due Dates and Use New Raise Option

The screenshot shows the 'Create To-Do' form with three tabs: 'Details', 'Raise Options', and 'Privileges'. The 'Raise Options' tab is active. The form includes sections for Cohorts, Student Closure Actions, and Course Context. Two blue callout boxes with arrows provide instructions: one points to the 'Allow Due Dates' checkbox, and the other points to the 'Allow students to request closure of this item' radio button.

Create To-Do Details **Raise Options** Privileges

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.
☒ **Allow students to request closure of this item**
If selected and students have the view privilege, students can request resolution of items. Students are required to comment.

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
The text entered in this field will be used as the default comment when a To-Do of this type is created.

Never Mind < Back Next >

Check the Allow Due Dates box. To-Dos with Due Dates show on the student calendar.

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

Set Up Privileges and Select Email Templates

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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

37

 ✕

Create Message Template

PropertiesHeaderMessage

*** Email Message Template**

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

Hi  Student First Name ,

I have created the following To-Do for you:  To-Do Name

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

Best wishes,

 Creator Name

Will you create separate templates for To-Dos that require review vs those a student can close?

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 Internal Link Option

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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**

Use New Insert Field Options

A field in a message template behaves like a mail merge field in a word processor. When a message is sent using the template, each field will be replaced with appropriate data that is specific to the individual recipient of that message.

Select a field to insert into the message template.

Student Can Manage	Prefix Specify any static text that will appear before the dynamic value of the selected field.	
Student Cell Phone		
Student Email		
Student First Name		
Student Full Name		
Student Id		
Student Last Name		
Student Phone		
Student Reason		Suffix Specify any static text that will appear after the dynamic value of the selected field.
Student Requested Review Comment		
Student Requested Review Date		

If the selected field has available data, the following is a preview of the text that will be inserted into the message.

{No field selected}

If the selected field has no data, the following text will be inserted in place of the field, prefix, and suffix above.

Never Mind

Insert

Example Past Due Template for Staff Members

40

Edit Message Template

Properties > Header > Message

*** Email Message Template**

B **I** U |  |  |  |  |  |  | 

Dear  Recipient First Name ,

The following student has a past due item that may require your attention:

 Student Full Name:

 To-Do Name:

 Student Requested Review Date:

 Student Reason:

 Student Requested Review Comment:

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.

 |  |  | 

0 of 160 characters

*** Required fields**

Cancel

< Back

Finish

Example Past Due Template for Students

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 ✕

Edit Message Template Properties Header Message

*** Email Message Template**

B **I** U |  |   |  (x) 

Dear  Recipient First Name ,

The following item is past due:

 To-Do Name:

 Add Notes:

 Student Requested Review Date:

 Student Reason:

 Student Requested Review Comment:

Log into your [Starfish Student Dashboard](#) to see any currently open To-Dos.

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.

 |  (x) 

0 of 160 characters

*** Required fields**

Cancel < Back Finish

Tips for Templates

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A field in a message template behaves like a mail merge field in a word processor. When a message is sent using the template, each field will be replaced with appropriate data that is specific to the individual recipient of that message.

Select a field to insert into the message template.

Add Notes	
Added Date	
Assigned By	
Assigned Date	
Assigned Note	
Assigned To	
Course Name	
Course Section Id	
Creator Cell Phone	
Creator Email	
Creator Name	

Prefix

Specify any static text that will appear before the dynamic value of the selected field.

Please disregard this message as you have already requested review for this item. See the details below.

Date You Requested Review:

Suffix

Specify any static text that will appear after the dynamic value of the selected field.

If the selected field has available data, the following is a preview of the text that will be inserted into the message.

Please disregard this message as you have already requested review for this item. See the details below.

Date You Requested Review: (Student Requested Review Date)

If the selected field has no data, the following text will be inserted in place of the field, prefix, and suffix above.

If you have already completed this item, you can log into your Starfish student dashboard to let us know.

Cancel

Save

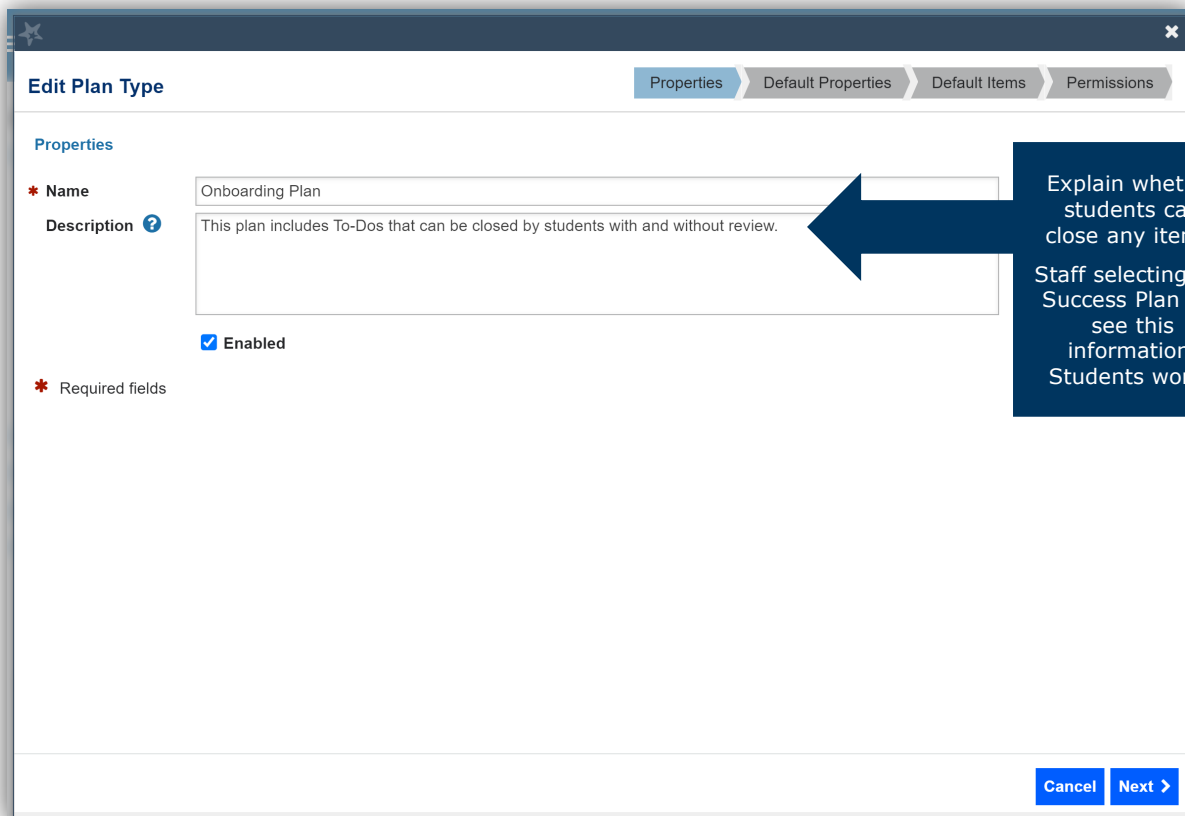
1

2

3

If You Are Using Success Plans: Tip #1

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The screenshot shows a web application window titled "Edit Plan Type" with a close button (X) in the top right corner. Below the title bar are four tabs: "Properties" (active), "Default Properties", "Default Items", and "Permissions". Under the "Properties" tab, the "Name" field is labeled with a red asterisk and contains the text "Onboarding Plan". The "Description" field is labeled with a red asterisk and a question mark icon, and contains the text "This plan includes To-Dos that can be closed by students with and without review." Below the description field is a checkbox labeled "Enabled" which is checked. At the bottom left, there is a red asterisk icon followed by the text "Required fields". At the bottom right, there are two buttons: "Cancel" and "Next >". A large blue arrow points from a callout box on the right to the "Description" field.

Edit Plan Type

Properties Default Properties Default Items Permissions

Properties

* **Name** Onboarding Plan

* **Description** ? This plan includes To-Dos that can be closed by students with and without review.

☒ **Enabled**

* Required fields

Cancel Next >

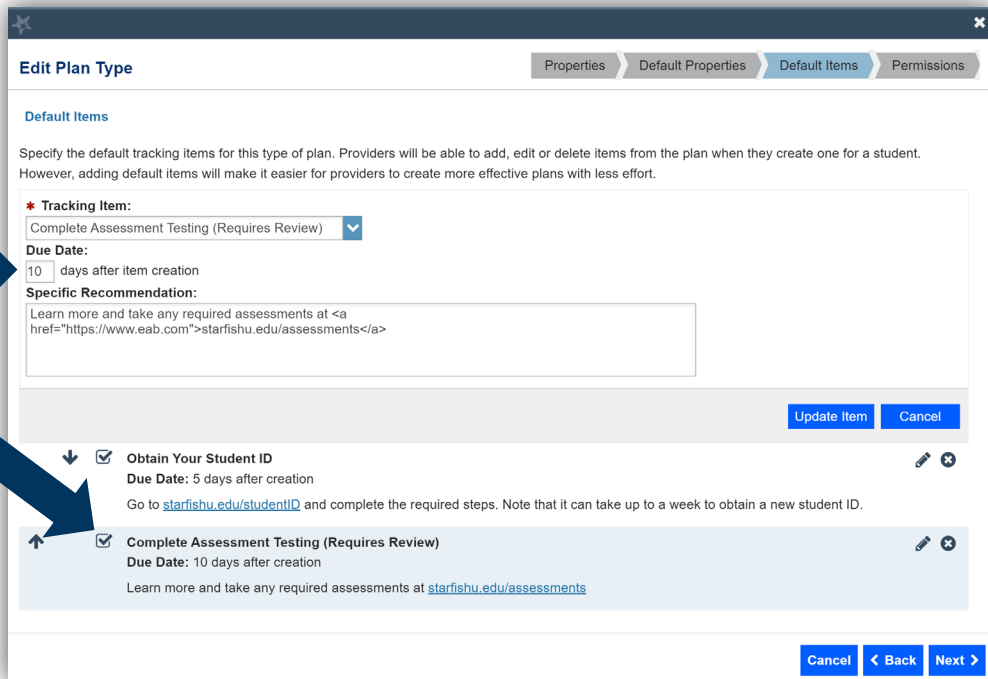
Explain whether students can close any items.

Staff selecting the Success Plan will see this information. Students won't.

Success Plans Tip #2

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Include Due Dates for items so staff members have them prepopulated.



The screenshot shows the 'Edit Plan Type' window with the 'Default Items' tab selected. The window title is 'Edit Plan Type' and it has tabs for 'Properties', 'Default Properties', 'Default Items', and 'Permissions'. The 'Default Items' section has a description: '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.'

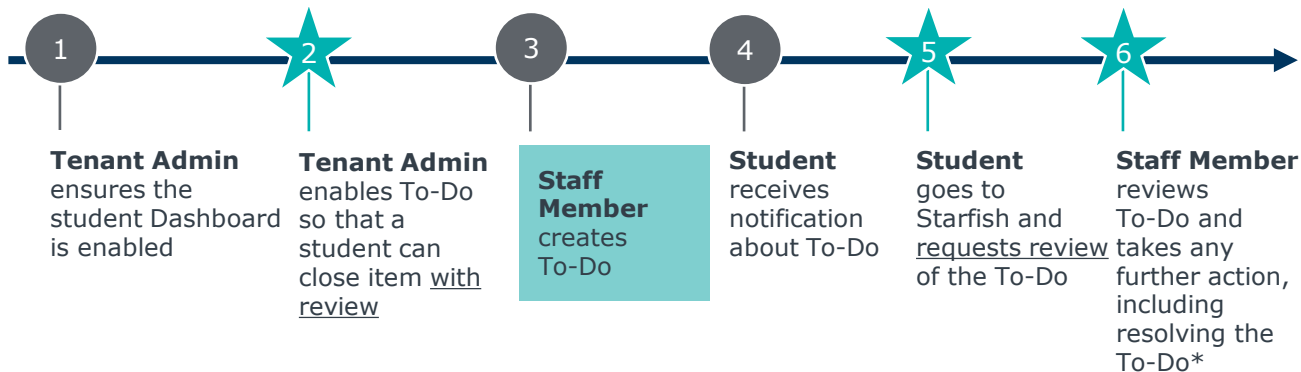
Under 'Default Items', there is a 'Tracking Item' section with a dropdown menu showing 'Complete Assessment Testing (Requires Review)'. Below this, the 'Due Date' is set to '10 days after item creation'. A 'Specific Recommendation' box contains the text: 'Learn more and take any required assessments at starfishu.edu/assessments'. At the bottom right of this section are 'Update Item' and 'Cancel' buttons.

Below the 'Tracking Item' section, there is a list of items. The first item is 'Obtain Your Student ID' with a checkbox, a downward arrow, and a due date of '5 days after creation'. The description says: 'Go to [starfishu.edu/studentID](https://www.eab.com) and complete the required steps. Note that it can take up to a week to obtain a new student ID.' The second item is 'Complete Assessment Testing (Requires Review)' with a checkbox, an upward arrow, and a due date of '10 days after creation'. The description says: 'Learn more and take any required assessments at [starfishu.edu/assessments](https://www.eab.com)'. At the bottom right of the list are 'Cancel', '< Back', and 'Next >' buttons.

Poll 5:
Do you intend
to update
Success Plans?



Without Review – Staff Experience



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Staff Member Creates a To-Do

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Create To-Do for Karen Sanders [Never Mind] [Save]

* **To-Do** Complete Assessment Testing (Requires Review) [v]

Course Context No Course [v] [?]

Due Date 09-22-2022 [v]

Assignee [?]
☒ Unassigned
☐ Me
☐ Other Provider
[v]

Comment
Learn more and take any required assessments at starfishu.edu/assessments
>

Student View: The student can view this item and the notes entered above. The student can request resolution of this item via the student's Dashboard and is required to comment.

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

- Academic Advisor
- Instructor
- Program Advisor
- Creator

* Required fields [Never Mind] [Save]

Include a
Due Date

Student Can
Close With
Review
language

Or Adds a Success Plan

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Karen Sanders

FlagReferral

OverviewInfoSuccess PlansDegree PlannerCoursesTrackingMeetingsNotesNetwork

Add Success Plan for Karen Sanders

Never MindSubmit

* Plan Type

* Plan Name

Academic Probation
This plan should be completed by the advisor for all students applying for graduation.
Custom Action Plan
A plan with minimal defaults that end users can customize
Financial Planning
Students on financial aid are required to complete this plan.
Graduation Approval
This plan should be completed by the advisor for all students applying for graduation.
Onboarding Plan
This plan includes To-Dos that can be closed by students with and without review.

* Tracking Item

Select a tracking item...

Due Date

Course Context

Select a Course...

Specific Recommendation

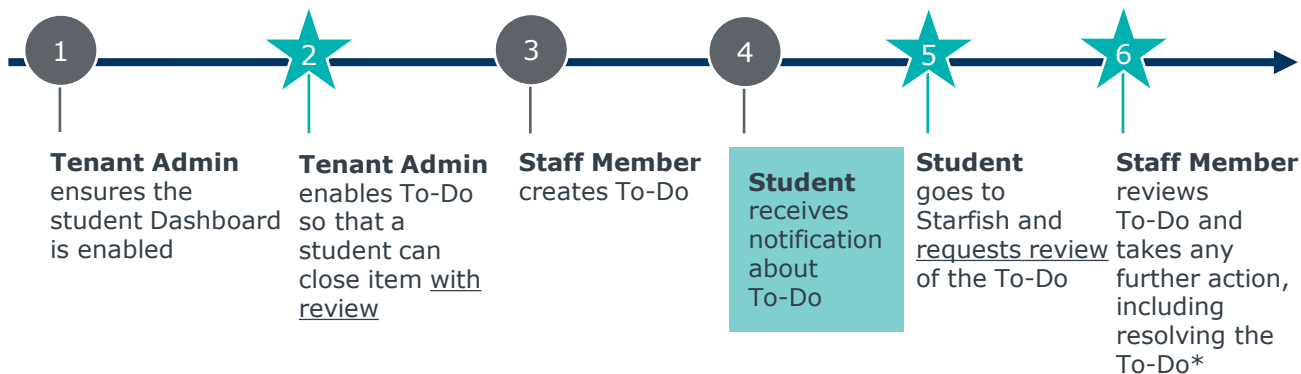
* Required fields

Add ItemNever Mind

Never MindSubmit

Explains that items are closeable by students (only if the Tenant Admin has included the info in the Description)

Student Receives Notification About To-Do



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Notification Contains Direct Link

50

[Tenant 2000000004] New To-Do: Obtain your new student ID



ygold@hobsonsdev.com

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



6:35 PM

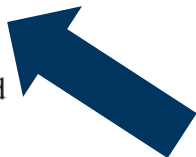
CAUTION (EXTERNAL EMAIL): Do not click links or open attachments unless you recognize the sender. Use the "Report Phishing" button to report suspicious messages.

Hi Harper,

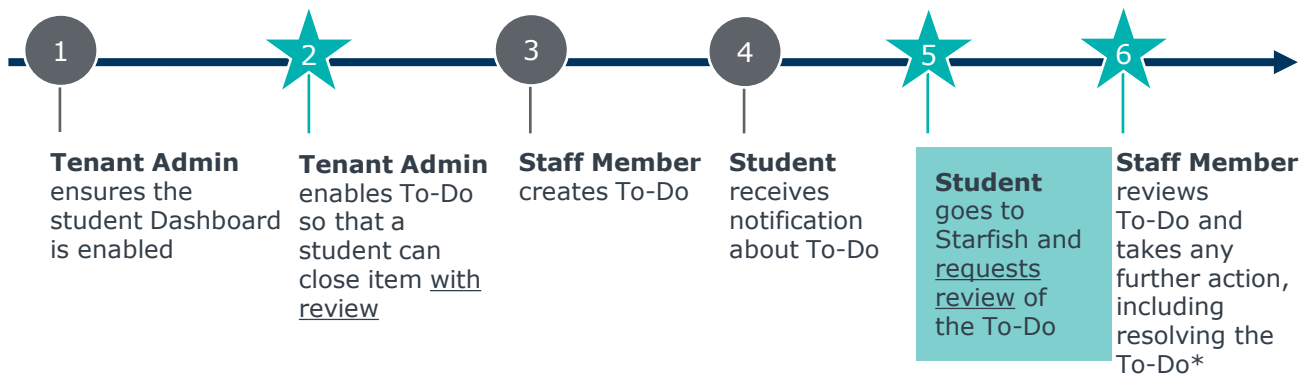
I have created the following To-Do for you: Obtain your new student ID

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

Best wishes,
Yolanda Gold



Student Accesses Starfish Dashboard



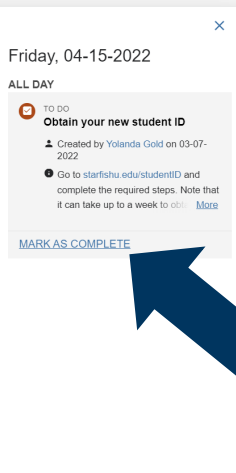
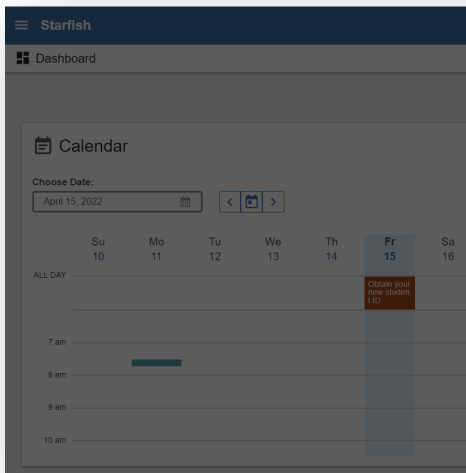
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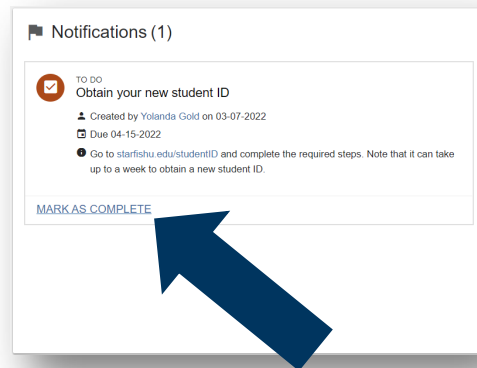
Student Sees MARK AS COMPLETE Option

52

- Calendar widget



- Notifications widget



Student Opens the Mark Item Complete Drawer

53

- Creator's name is in the intro & item details
- Three completion options
 - I completed this item!
 - I don't need to do this item.
 - **I have another reason.**
- **Required comment**
- Submission button is called **REQUEST REVIEW**

×

Mark Item Complete

After you select **Request Review**, Yolanda Gold and other connections will see that you want to mark this item complete and someone will review it. If approved, this item will be removed from your dashboard.

Item being marked complete:

✓ TO DO

Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

Due 09-22-2022

Learn more and take any required assessments at startfishu.edu/assessments

*Mark item complete because:

☐ ☒ I completed this item!

☐ ☒ I don't need to do this item.

☐ ☒ I have another reason.

*Please share details

CANCEL

REQUEST REVIEW

Student Requests Review

54

×

Mark Item Complete

After you select **Request Review**, Yolanda Gold and other connections will see that you want to mark this item complete and someone will review it. If approved, this item will be removed from your dashboard.

Item being marked complete:



TO DO

Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

Due 09-22-2022

Learn more and take any required assessments at starfishu.edu/assessments

*Mark item complete because:

☒  I completed this item!

☐  I don't need to do this item.

☐  I have another reason.

*Please share details

I only had one required assessment and it's now complete.

CANCEL

REQUEST REVIEW

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Student Requests Review

55

×

Mark Item Complete

After you select **Request Review**, Yolanda Gold and other connections will see that you want to mark this item complete and someone will review it. If approved, this item will be removed from your dashboard.

Item being marked complete:

 TO DO

Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

Due 09-22-2022

Learn more and take any required assessments at starfishu.edu/assessments

*Mark item complete because:

☒  I completed this item!

☐  I don't need to do this item.

☐  I have another reason.

*Please share details

I only had one required assessment and it's now complete.

CANCEL

REQUEST REVIEW

Dashboard

Request Help

Calendar

Choose Date: September 22, 2022

Su	Mo	Tu	We	Th	Fr	Sa
18	19	20	21	22	23	24

ALL DAY

7 am

8 am

9 am

10 am

Notifications (3)

TO DO

Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

Due 09-22-2022

Learn more and take any required assessments at starfishu.edu/assessments

You took action on this item. It was sent for review on 08-29-2022.

PENDING REVIEW

Flag Poor Attendance

Created by Justin Withers on 08-29-2022

Macroeconomics (BUSN-ECON101-408-201103)

Karen missed the first 2 classes in the semester.

My Connections (15)

Wayne Bruce
General Advisor
Wayne.Bruce@starfishcollege.net
(757) 622-4487

SCHEDULE CALL

Riri Calhoun
General Advisor
Riri.Calhoun@starfishcollege.net
(757) 622-4487

My Services (12)

Advising Center WAITING ROOM CLOSED

SCHEDULE CALL

Freshman Seminar Advising

Awesome! Your item has been sent for review.

Awesome! Your item has been sent for review.

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Student Requests Review

56

Mark Item Complete

After you select **Request Review**, Yolanda Gold and other connections will see that you want to mark this item complete and someone will review it. If approved, this item will be removed from your dashboard.

Item being marked complete:

TO DO Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

Due 09-22-2022

Learn more and take any required assessments at starfishu.edu/assessments

*Mark item complete because:

☒ I completed this item!

☐ I don't need to do this item.

☐ I have another reason.

*Please share details

I only had one required assessment and it's now complete.

CANCEL

REQUEST REVIEW

The dashboard is titled "Dashboard" and includes a "Request Help" link. It features four main sections: "Calendar" with a date picker for September 22, 2022, and a calendar grid showing a "Complete Assessment Testing" event on Thursday, September 22nd; "Notifications (3)" with a "TO DO" notification for "Complete Assessment Testing (Requires Review)" created by Yolanda Gold on 08-29-2022, due 09-22-2022, and a "PENDING REVIEW" notification for "Poor Attendance" created by Justin Withers on 08-29-2022; "My Connections (15)" listing Wayne Bruce and Riri Calhoun as General Advisors; and "My Services (12)" listing the Advising Center (with a "WAITING ROOM CLOSED" status), a "SCHEDULE" link, and a "CALL" link. A blue arrow points from the "REQUEST REVIEW" button in the left sidebar to the "TO DO" notification in the dashboard.

Awesome! Your item has been sent for review.

TO DO Complete Assessment Testing (Requires Review)

Created by Yolanda Gold on 08-29-2022

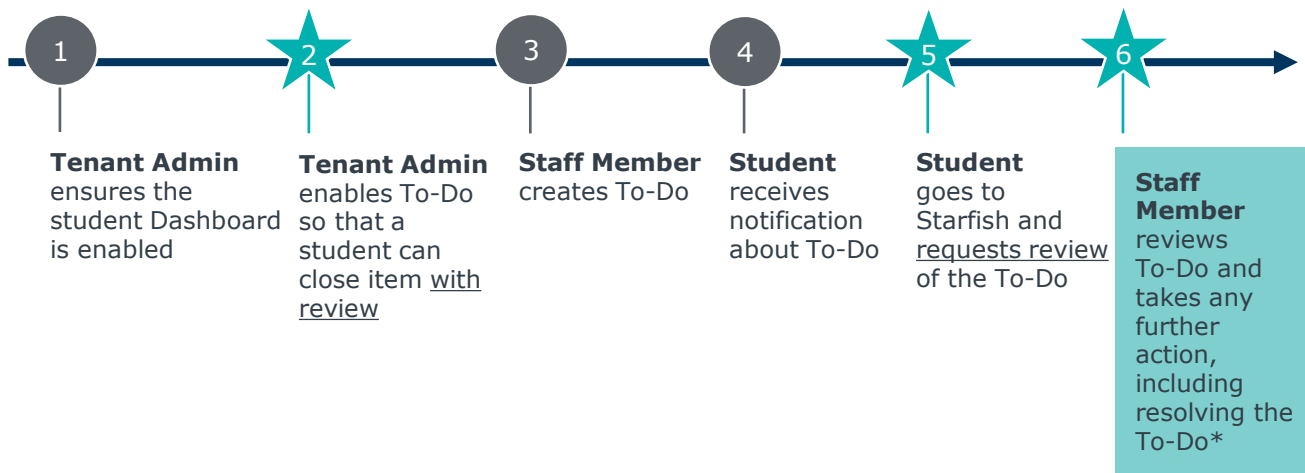
Due 09-22-2022

Learn more and take any required assessments at starfishu.edu/assessments

You took action on this item. It was sent for review on 08-29-2022.

PENDING REVIEW

Staff Member Reviews To-Do and Takes Action



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Needs Review To-Do on Staff Home Page

58

Starfish Search for Students

Office Hours Appointment Group Session Event Scheduling Wizard Reserve Time Record Attendance

System Announcement: Fall course approvals are required for registration and must be in by the end of the 10/15/2022.

Outstanding Progress Surveys: [Microbiology II \(SCI-BIOL202-600-202203\): 3 Question Flag Survey, more...](#)

My Services

Advising Center

703-555-9876
advising@starfishcollege.test
<http://starfishcollege.test/advising>

Waiting Room

Waiting Room is **enabled** for students.
There are no students in the waiting room.

Appointments

Show Next 7 days

- Sanders, Karen:** Today at 7:00 am Weekly advising
Location: Chrysler Hall, Room 301
- O'Neil, Ryan:** Tomorrow at 9:15 am General visit
Location: Chrysler Hall, Room 301
- Gray, Jen:** Tomorrow at 9:45 am Career advice
Location: Chrysler Hall, Room 301

Recent Changes

Show All Activity Filtered in Past 24 hours

Needs Review To-Do: [Sanders, Karen](#) Complete Assessment Testing (Requires Review): Today

Karen Sanders

SUMMARY STUDENT INFO

☒ **Complete Assessment Testing (Requires Review)**

Student Requested Review (Today)
Reason: I completed this item
Comments provided.
Due by 09-22-2022

Details Edit Comment Assign Clear

Batch Sent Items

No items to display

Needs Review To-Do on Tracking Tab

59

Starfish

OVERVIEW MY STUDENT TRACKING INTAKE

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

Search for Students

PROGRESS SURVEYS (4)

Student View Connection Additional Filters

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

☐	Student	Success Score	Item Name	Status	Created Date	Resolved Date	Assigned To	Due
☐	 Sanders, Karen ksanders4398		☒ Complete Assessment Testing (Requires Review)	Needs Review	Today by Gold, Yolanda			09-22-2022
☐	 Mack, Emma emack4384	61			Today by Gold, Yolanda		Jackson, Paul on Today	Tomorrow
☐	 O'Neil, Ryan ro'neil4390	70			Today by Gold, Yolanda			
☐	 O'Neil, Ryan ro'neil4390	70			Today by Gold, Yolanda			
☐	 O'Neil, Ryan ro'neil4390	70			Today by Gold, Yolanda			

Karen Sanders

SUMMARY STUDENT INFO

☒ Complete Assessment Testing (Requires Review)

Student Requested Review (Today)
Reason: I completed this item!
Comments provided:
Due by 09-22-2022

Details Edit Comment Assign Clear

Any View drop down option that contains Active items automatically includes the Needs Review status.

Needs Review To-Do on Tracking Tab

60



Starfish

Search for Students

OVERVIEW MY STUDENTS **TRACKING** INTAKE ZOOM IN ATTENDANCE PROGRESS SURVEYS (4)

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

Student View Connection Cohort Additional Filters

Student Name, Username, or ID

Student	Success Score
☐ Sanders, Karen ksanders4398	
☐ Mack, Emma emack4384	61
☐ O'Neil, Ryan ro'neil4390	70
☐ O'Neil, Ryan ro'neil4390	70
☐ O'Neil, Ryan ro'neil4390	70

Additional Filters

Tracking Items

Cohorts & Relationships

Meetings

Success Plans

Degree Plans

Success Scores

Attributes

Students with Tracking Items

Status

☐ Active (includes Needs Review)

☒ Needs Review

☐ Resolved

☐ All

Tracking Type

Closure Reason

Item Name

Created By

☒ Anyone ☐ Me

☐ Role

Assigned To

☒ All assigned and unassigned

☐ Unassigned

☐ Me

☐ User

☐ Role

Course Context

Required fields

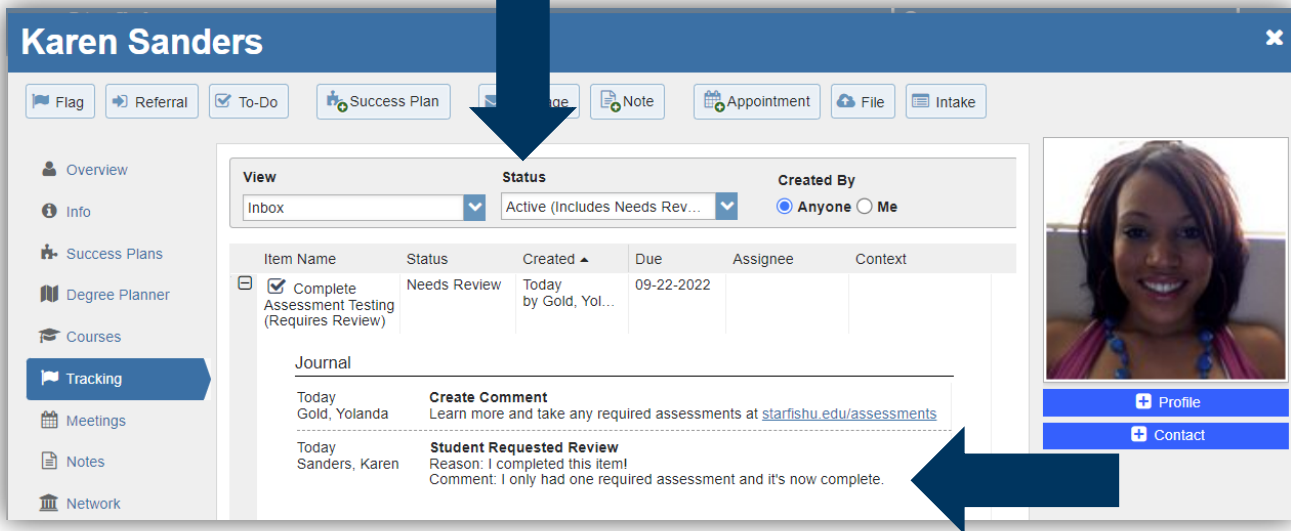
Clear All Filters Never Mind Submit

Assigned To

Jackson, Paul on Today Tomorrow

Needs Review To-Do on Student Folder

61



Karen Sanders

Flag Referral To-Do Success Plan Note Appointment File Intake

Overview Info Success Plans Degree Planner Courses **Tracking** Meetings Notes Network

View Status Created By

Inbox Active (Includes Needs Rev...) Anyone Me

Item Name	Status	Created	Due	Assignee	Context
☒ Complete Assessment Testing (Requires Review)	Needs Review	Today by Gold, Yol...	09-22-2022		

Journal

Today
Gold, Yolanda **Create Comment**
Learn more and take any required assessments at starfishu.edu/assessments

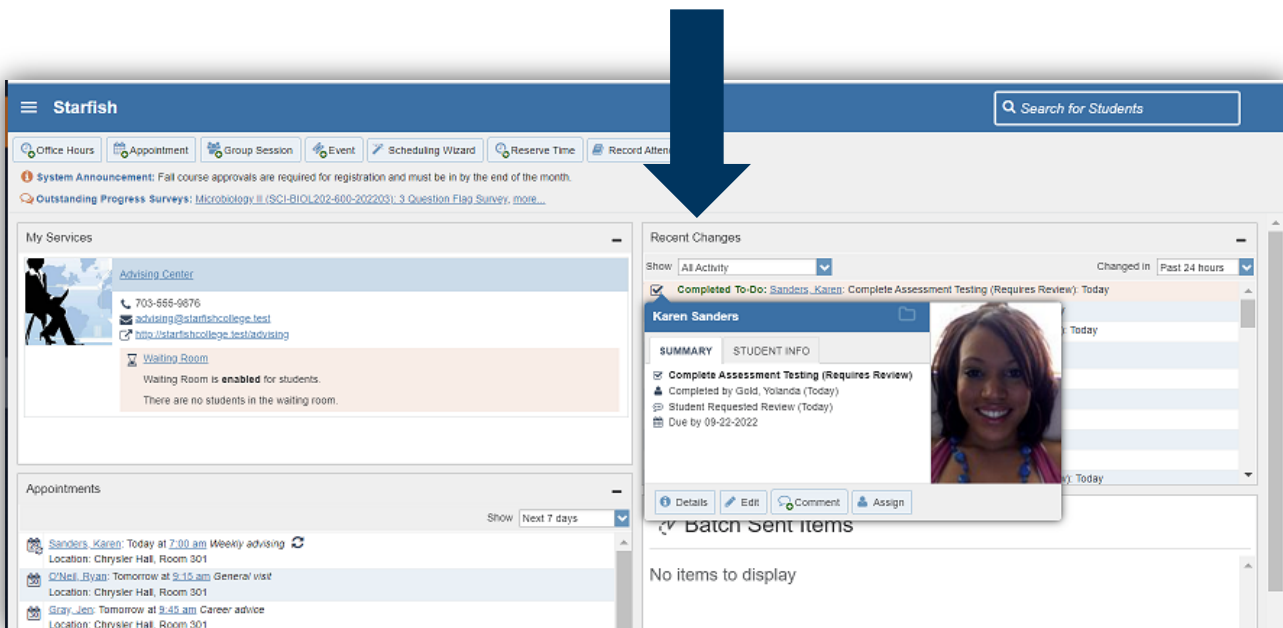
Today
Sanders, Karen **Student Requested Review**
Reason: I completed this item!
Comment: I only had one required assessment and it's now complete.



+ Profile
+ Contact

Resolved To-Do on Staff Dashboard

62



The screenshot displays the Starfish Staff Dashboard. A large blue arrow points from the top of the page to the 'Completed To-Do' item for Karen Sanders. The dashboard includes a top navigation bar with the Starfish logo and a search bar. Below the navigation bar are tabs for various services: Office Hours, Appointment, Group Session, Event, Scheduling Wizard, Reserve Time, and Record Attendance. A system announcement and an outstanding progress survey are also visible. The main content area is divided into sections: 'My Services' (Advising Center, Waiting Room), 'Appointments' (listing upcoming sessions for Karen Sanders, Chelley Byas, and Gary Lee), and 'Recent Changes' (showing a completed to-do item for Karen Sanders). A pop-up window for Karen Sanders shows her profile picture and a list of completed tasks, including 'Complete Assessment Testing (Requires Review)' and 'Student Requested Review (Today)'. The 'Batch Sent Items' section at the bottom is empty.

Starfish Search for Students

Office Hours Appointment Group Session Event Scheduling Wizard Reserve Time Record Attendance

System Announcement: Fall course approvals are required for registration and must be in by the end of the month.

Outstanding Progress Surveys: Microbiology III (SCL-BIOI 202-600-202203), 3 Question Flag Survey, [more...](#)

My Services

Advising Center

703-666-9876
advising@starfishcollege.test
<http://www.starfishcollege.test/advising>

Waiting Room

Waiting Room is **enabled** for students.
There are no students in the waiting room.

Appointments

Next 7 days

Sanders, Karen: Today at 7:00 am Weekly advising
Location: Chrysler Hall, Room 301

Chelley, Byas: Tomorrow at 9:15 am General visit
Location: Chrysler Hall, Room 301

Gary, Lee: Tomorrow at 9:45 am Career advice
Location: Chrysler Hall, Room 301

Recent Changes

Show: All Activity Changed in: Past 24 hours

Completed To-Do: Sanders, Karen: Complete Assessment Testing (Requires Review): Today

Karen Sanders

SUMMARY STUDENT INFO

☒ **Complete Assessment Testing (Requires Review)**

☒ Completed by Gold, Yolanda (Today)

☒ Student Requested Review (Today)

☒ Due by 09-22-2022

Batch Sent Items

No items to display

Resolved To-Do on Tracking Tab

63

Starfish

Search for Students

OVERVIEW MY STUDENTS TRACKING INTAKE ZOOM IN ATTENDANCE PROGRESS SURVEYS (4)

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

Student Name, Username, or ID Connection All My Students Cohort Additional Filters Edit Filters

Student	Success Score	Item Name	Status	Created Date	Resolved Date	Assigned To	Due
☐ Sanders, Karen ksanders4398		☒ Complete Assessment Testing (Requires Review)	Resolved	Today by Gold, Yolanda	Today by Gold, Yolanda		09-22-2022
☐ Mack, Emma emack4384	61					Jackson, Paul on Today	Tomorrow
☐ O'Neil, Ryan ro'neil4390	70	☒ Complete Assessment Testing (Requires Review)		Completed by Gold, Yolanda (Today)			
☐ O'Neil, Ryan ro'neil4390	70	☒ Student Requested Review (Today)		Due by 09-22-2022			
☐ O'Neil, Ryan ro'neil4390	70						
☐ O'Neil, Ryan ro'neil4390	70						
☐ O'Neil, Ryan ro'neil4390	70	☒ Verify Minimum GPA	Active	Today by Gold, Yolanda			09-08-2022

Karen Sanders

SUMMARY STUDENT INFO

☒ Complete Assessment Testing (Requires Review)

Completed by Gold, Yolanda (Today)

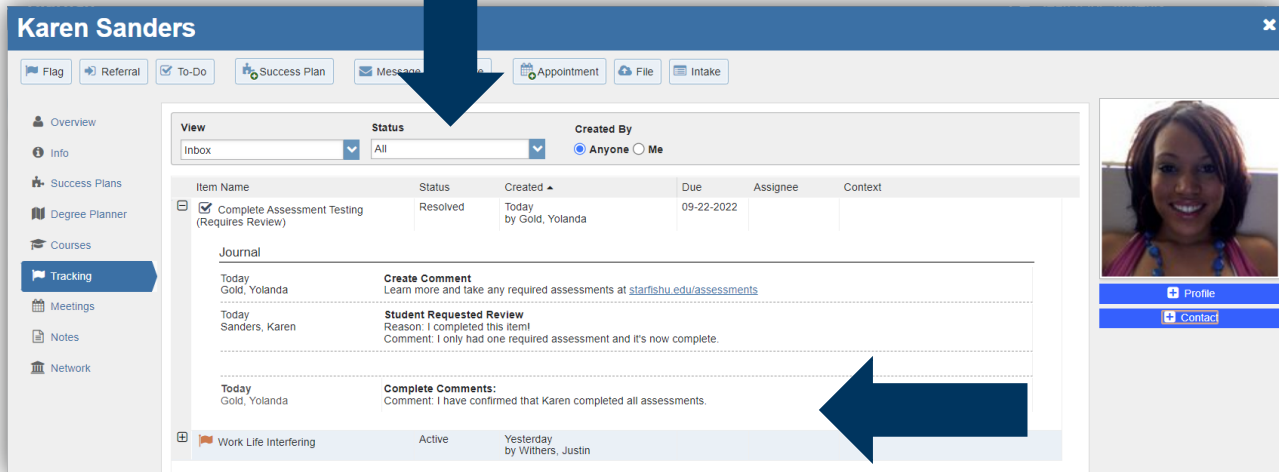
Student Requested Review (Today)

Due by 09-22-2022

Details Edit Comment Assign

Resolved To-Do on Student Folder

64



Karen Sanders

Flag Referral To-Do Success Plan Messages Appointment File Intake

Overview Info Success Plans Degree Planner Courses **Tracking** Meetings Notes Network

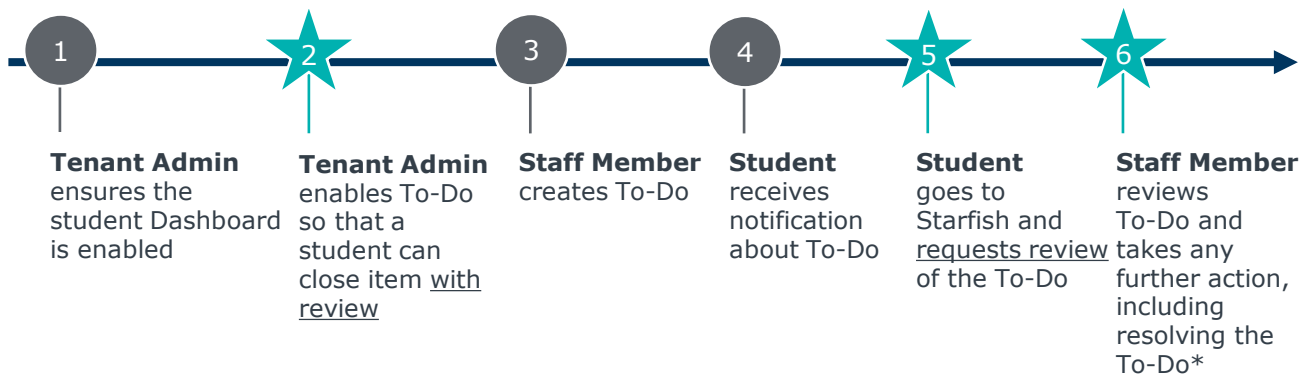
View **Status** **Created By**

Inbox All Anyone Me

Item Name	Status	Created	Due	Assignee	Context
☒ Complete Assessment Testing (Requires Review)	Resolved	Today by Gold, Yolanda	09-22-2022		
Journal					
Today Gold, Yolanda	Create Comment Learn more and take any required assessments at starfishu.edu/assessments				
Today Sanders, Karen	Student Requested Review Reason: I completed this item! Comment: I only had one required assessment and it's now complete.				
Today Gold, Yolanda	Complete Comments: Comment: I have confirmed that Karen completed all assessments.				
☐ Work Life Interfering	Active	Yesterday by Withers, Justin			

Profile Contact

To-Do Is Removed from Student's Dashboard



Indicates step is different compared to the without review process

* To-Do is removed from student's Dashboard after the To-Do is resolved by staff member

Starfish Configuration Report



Tracking Items Report Exporter Tracking Data File



A Few Ideas for Using the Updated Tracking Item Data



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

▶ Are students closing To-Dos?

▶ Are you raising helpful To-Dos?



▶ How quickly are students closing To-Dos?

▶ Could more of your To-Dos be closed by students without review?

▶ How quickly are staff members reviewing To-Dos?



Sneak Peek Q&A



SECTION

5

Your Questions from the Sneak Peek (Part I)



1

Question 1

Who can view and search for Needs Review To-Dos?

Answer 1

Any role or user who has the View privilege for that To-Do as configured by the Tenant Administrator.

2

Question 2

Who can resolve Needs Review To-Dos?

Answer 2

Any role or user who has the Manage privilege for that To-Do as configured by the Tenant Administrator.

3

Question 3

Is there a way for staff members to see the open To-Dos that can be managed by students?

Answer 3

Based on initial institution feedback, we didn't make this update. We can add an Additional Filter so please submit a Compass Idea if it would be helpful.

Your Questions from the Sneak Peek (Part II)



4

Question 4

How will staff members know that they have Needs Review To-Dos to review?

Answer 4

They will see the Needs Review To-Dos wherever they currently manage their other tracking items.

5

Question 5

What if a student has requested review on an item that the staff member believes the student needs to take additional action on?

Answer 5

Institutions should follow their current tracking item workflow for contacting a student. There is no way to return a To-Do to a student within Starfish.

6

Question 6

How does NASA organize a party?

Answer 6

They planet.



Live Q&A

SECTION

6



Thank you for
joining us!

