Starfish | Student Success Platform

SUNY NEW PALTZ

# Starfish User Guide

April 2026

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# Welcome to Starfish ® at SUNY New Paltz!

Starfish is an easy-to-use platform that gives you the opportunity to connect on another level to help improve student success and persistence.

Everyone has a role in student success at SUNY New Paltz!

Helping our students be successful is a team effort. Depending on your role within the institution, however, you will likely have very specific priorities and goals in mind when you think about how best to support your students. Starfish works best when all members of our institution work together to address students' specific needs.

Getting started is easy!

**Login Directions:**

1. Sign in to my.newpaltz.edu
2. Click the "Starfish" link under "Resources" (left-hand column)

Starfish will automatically display all students that you are connected to through Banner (advisees or students in your courses), or through specialized roles (depending on your departments needs). You can raise alerts (flags, kudos, & referrals) about students, review alerts that have been raised about your students, and provide additional information.

# Starfish Terminology

**What is a Tracking Item?**

Tracking Items are just that, items that can be tracked through the Starfish system. You can search for these items in your student caseload in the Tracking tab. Tracking Items are Flags, Kudos, Referrals, and To-Dos.

**What is a Flag?**

A flag is a Tracking item that allows a faculty member to alert a student regarding a concern they have about the student's classroom performance. The student's academic advisor may also use this as a tool to intervene, to help the student to make a plan on how to resolve the concern and even help them get connected to resources on campus to assist.

**What is a Kudo?**

A kudo is a Tracking Item that allows faculty to recognize students who are on the right track, who have shown improvement, or deserve acknowledgement. Preliminary research shows kudos to be particularly impactful on students later in the semester (or around week nine).

**What is a Referral?**

A referral is a Tracking Item that will refer a student to a campus resource. By submitting a referral, the affiliated department will reach out to the student.

**What is a Progress Survey?**

Progress surveys are campus-wide initiatives that allow for the quick collection of faculty feedback about student performance.  Progress survey reporting items inform students and their advisor about academic concerns at specific times of the semester.

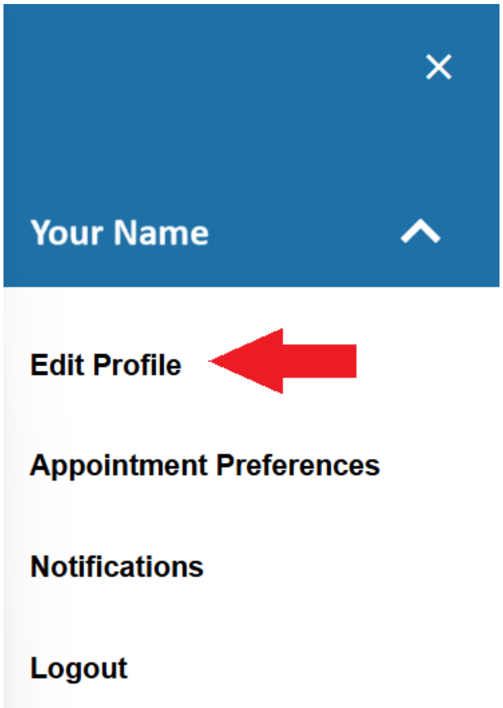
Faculty will receive instructions when the survey opens, and receive a reminder email prior to the due date if their progress surveys have not been completed.

**What are Office Hours?**

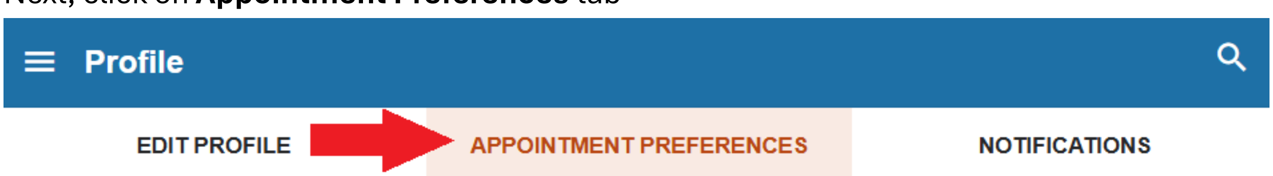
Starfish has a built-in Appointment Scheduling system called Office Hours. This allows students to schedule appointments with you based on your set availability. Office Hours can be customized to pre-scheduled appointments, drop-in appointments, or both.

# Profile Set-up

1. From the **menu**, click on the drop-down arrow next to your name.
2. Click **Edit Profile**

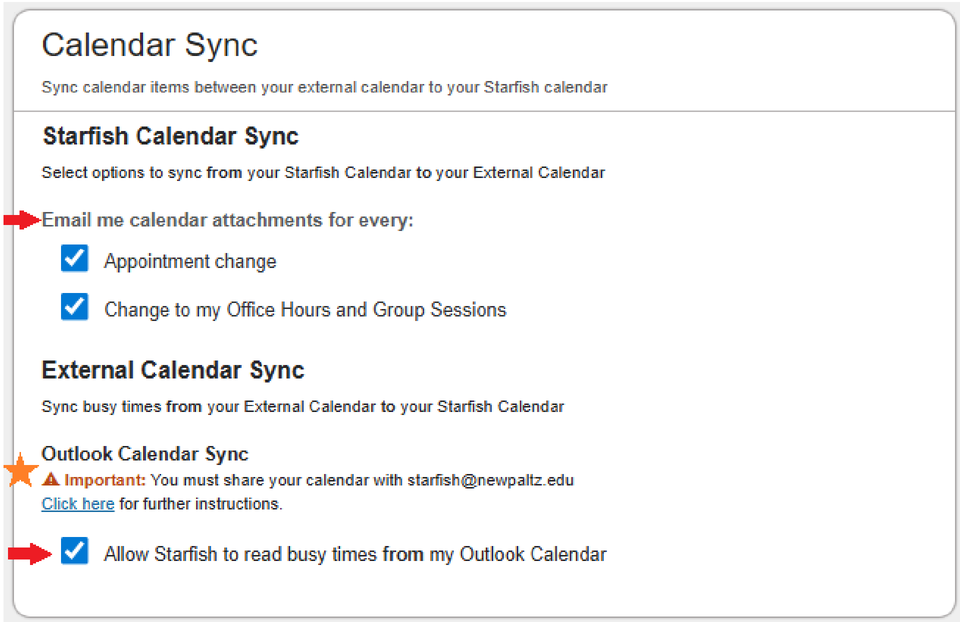



   a. Upload a photo using the **Upload Photo** button. Your Username and Institution Email are already set up.
   b. Under **Profile Settings**, toggle on the "Make URL available on my profile in the Service Catalog for other staff" if you would like students who are not connected with you to be able to schedule an appointment with you. If not, leave this toggle off
   c. Update your **Contact Information** as appropriate. NOTE: We recommend checking the box under Institution Email "Send notifications to my institution email address" so you can be appropriately notified when one of your students receives or raises a Tracking Item.
   d. Update your **About** section as appropriate. NOTE: We recommend updating your **Title**, as this will be reflected on the students' side, so they know your role at New Paltz. If no title is input, the system will default to the Role(s) you are assigned in Starfish.
   e. When you have finished updating the Edit Profile tab, click **Save Changes**
3. Next, click on **Appointment Preferences** tab

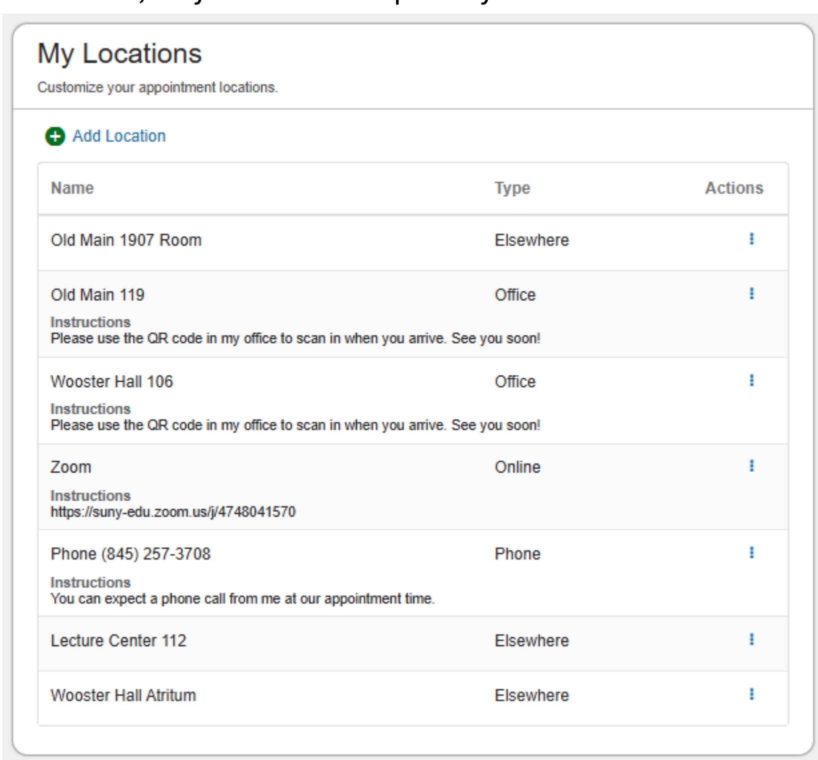



   a. Update your **Office Hour Defaults** to your preference
   b. Update your **Calendar Sync** as appropriate. NOTE: We recommend checking the box under "Email me calendar attachments for every" – "Appointment change" and "Change to my Office Hours and Group Sessions". However, if you do not want your Office Hour block to appear on your Outlook calendar, uncheck "Change to my Office Hours and Group

Sessions”. Follow the steps included in Starfish under **Outlook Calendar Sync** to share your Outlook calendar with Starfish. You will need to ensure the check next to “Allow Starfish to read busy times from my Outlook Calendar” is checked off to ensure you are not getting double booked.



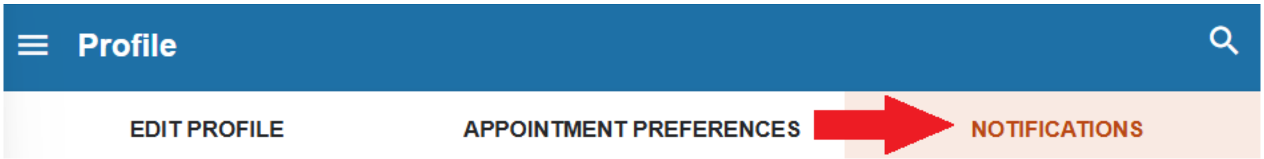

c. Update your **My Locations** with all locations and/or modalities you wish to offer your appointments. You can include multiple modalities if you wish to offer your office hours more than one way. NOTE: If you move office locations, make sure you update your My Locations, so you can then update your Office Hours.




d. Update your **Calendar Management** if you have an individual in your office that will be scheduling your appointments for you.

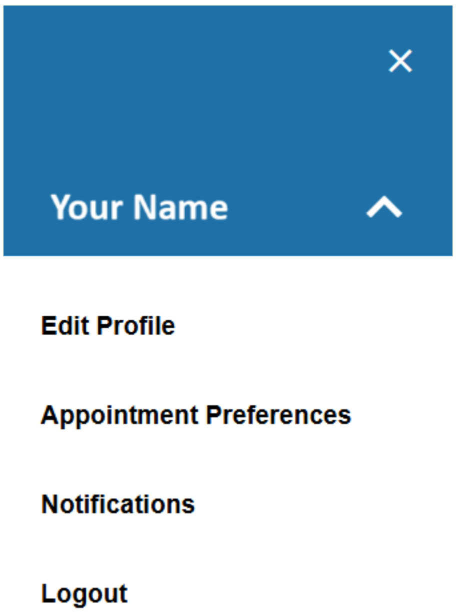
e. When you have finished updating the Appointment Preferences tab, click **Save Changes**

4. Next, click on **Notifications** tab




   a. Update your **Summary Emails** to your preference
   b. Update your **Planning Reminders** to your preference
   c. Update your **Tracking Items** to your preference. NOTE: We recommend checking the box under "Send me an immediate notification for every" – "New item raised" and "Item assigned to me". This is useful for workflow purposes, so you don't miss a tracking item when it comes in.
   d. When you have finished updating the Notifications tab, click **Save Changes**

5. Your **Starfish Profile** is now set-up! You can update these preferences at any time from the **menu**

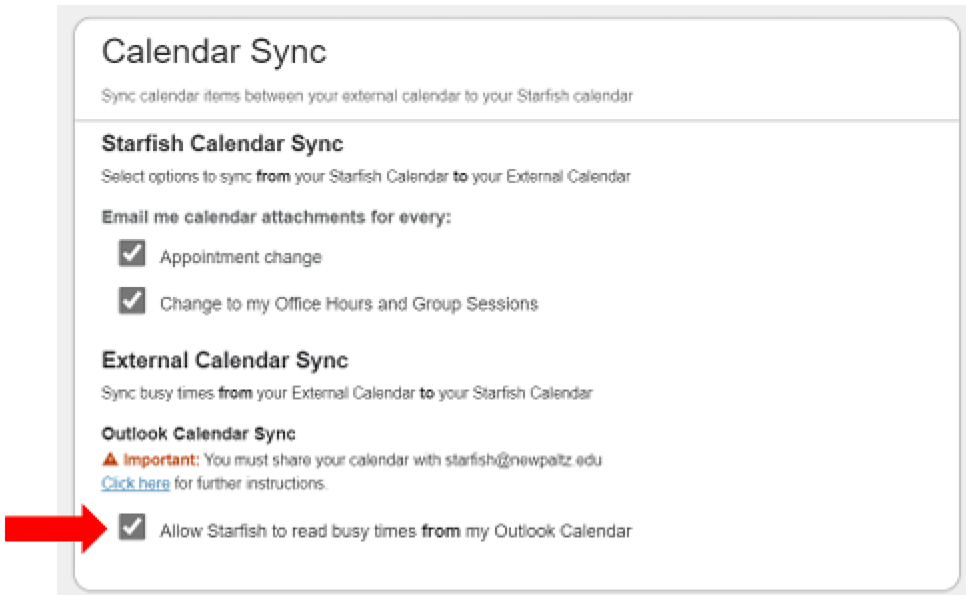


# Calendar and Office Hours Set-up

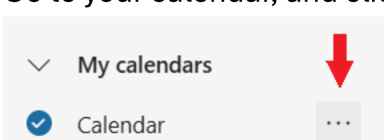
## Synching Starfish to Your Outlook Calendar

To ensure Starfish can read your busy times from your Outlook calendar, you will need to sync your Starfish and Outlook calendars. You may have already done this when setting up your profile.

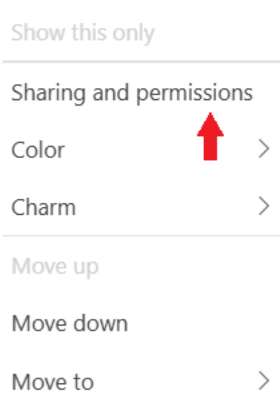
1. From the **menu**, click on the drop-down arrow next to your name.
2. Select **Appointment Preferences**
3. Scroll to the **Calendar Sync** section. Add a checkmark to "**Allow Starfish to read busy times from my Outlook calendar**"



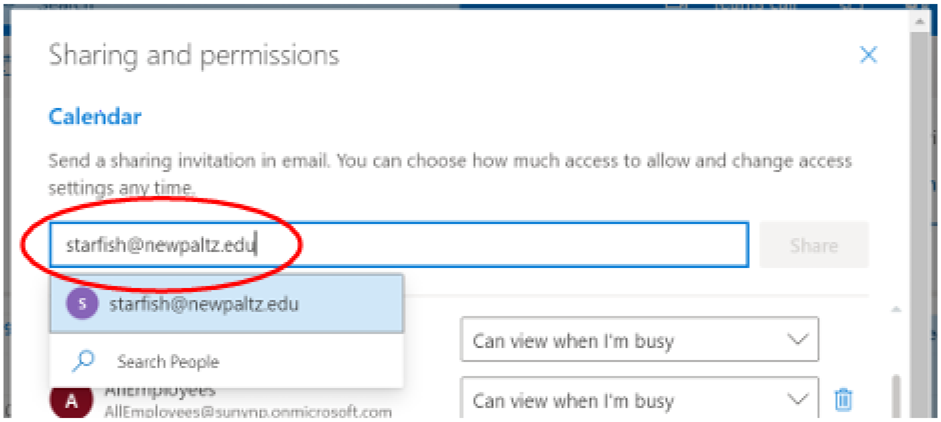

4. Select **Save Changes** at the bottom right corner of the screen
5. Log into your **Office 365** email. ***ONLY use Web Version of Outlook for this step NOT the desktop app.*
6. Go to your calendar, and click the three dots next to "Calendar"




7. Select **Sharing and Permissions**

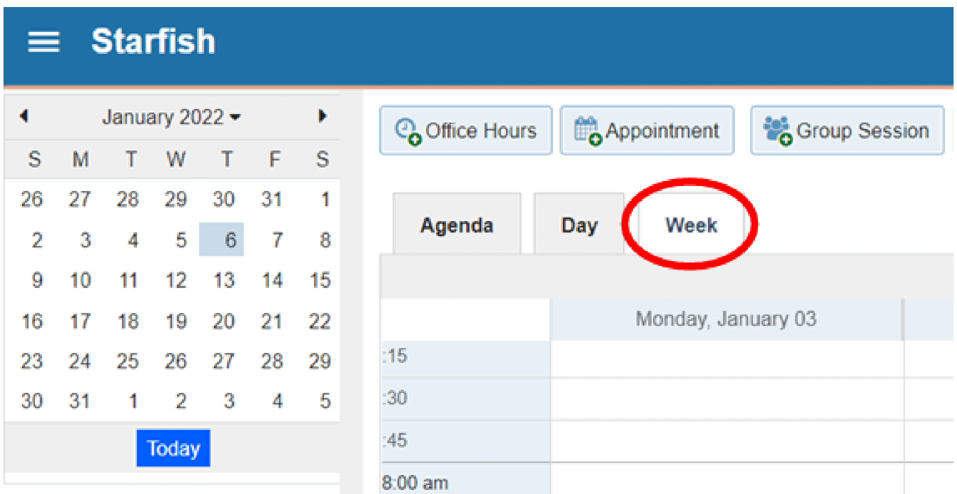



8. Add the email [starfish@newpaltz.edu](mailto:starfish@newpaltz.edu). Click **Share**




Now your Starfish Calendar will be synched with your Outlook calendar. Make sure you log out of **both** Starfish and Outlook and wait 15 minutes for the synching to complete.

9. To check if your calendars are successfully synced, after ~15 minutes, log into Starfish
10. From the menu, click on **Appointments**.
11. Click on the **week** tab




12. Scroll down to view your calendar. You should now see reserved time scheduled through your Outlook Calendar. Anything from your Outlook Calendar will read as "External Calendar" with the locked calendar icon. Note: you cannot edit your outlook calendar items through Starfish.

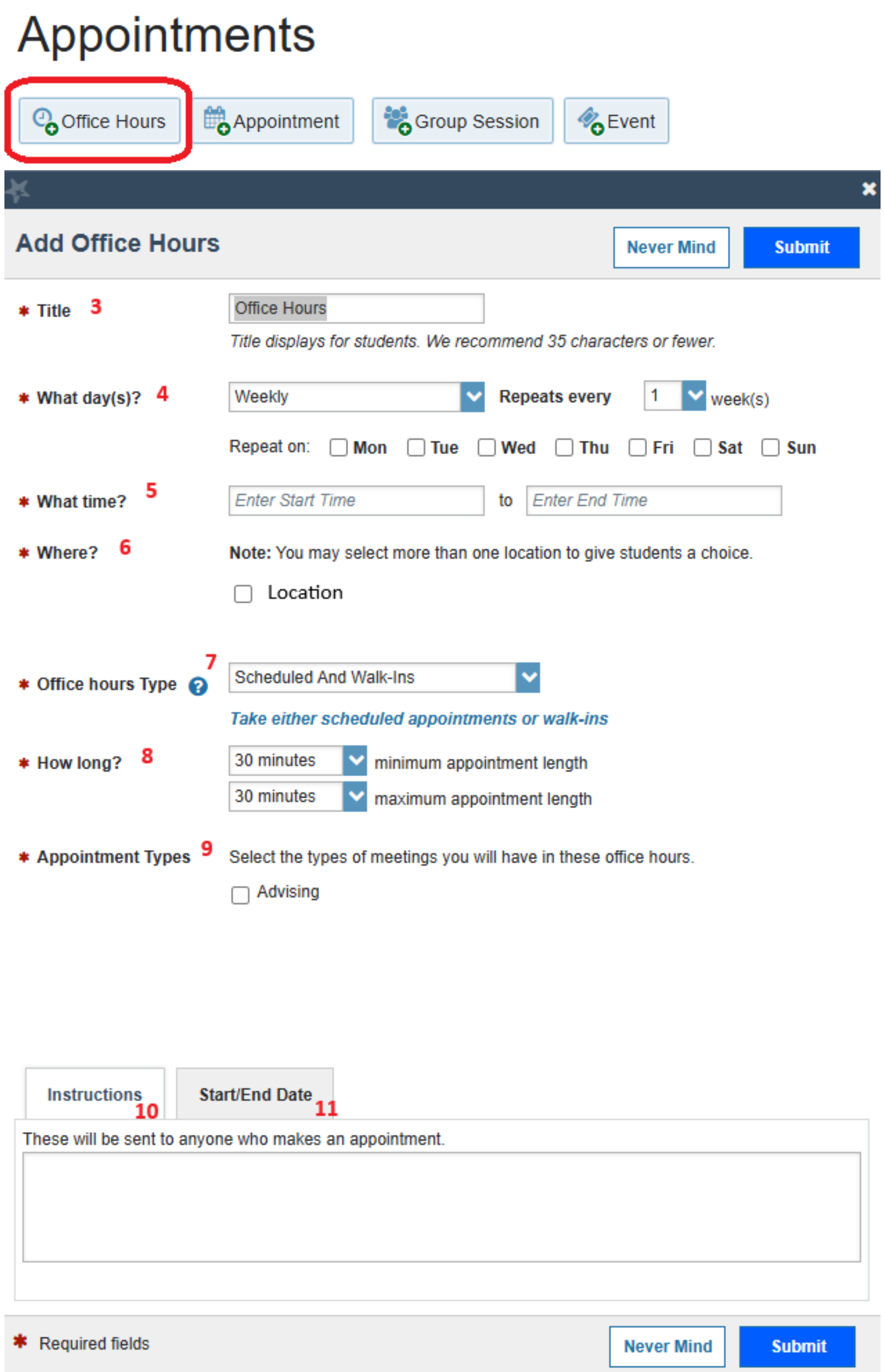
# Office Hour Set Up

The Add Office Hours option is designed for setting up a recurring block of time on a regular pattern, such as weekly or daily at a certain time.

You can set up your Office Hours two different ways. The first way is recommended.

## Setting up office hours through Appointments tab (recommended)

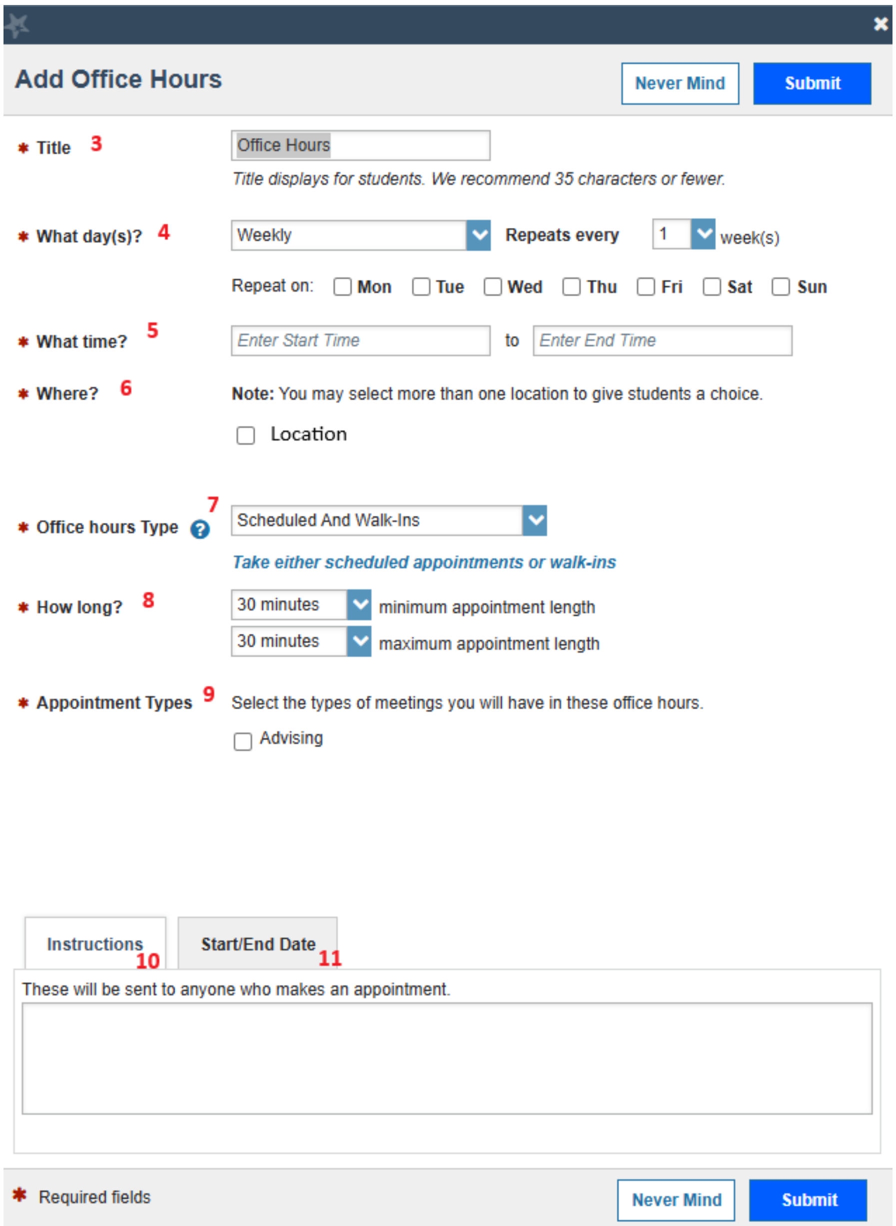
1. From the menu, select **Appointments.**
2. Select Office Hours on the **Appointments** page. The **Add Office Hour** form will display.



3. The **Title** for this block of time displays as “Office Hours” by default. You can change the **Title** to help you or others managing your calendar identify different types of office hours.
4. Select **What day(s)?** and indicate any recurrence (e.g. **Repeats every** 1 week, every Monday, etc).
5. Use the **What time?** fields to enter the start and end time for the office hours.
6. Select **Where?** meetings will be held using the checkbox(es) next to your location(s). If you choose more than one location, the student will be able to choose their preferred location for the meeting. To add additional location options, go to the **Appointment Preferences** page of your *Profile*.
7. Select the **Office Hour Type** dropdown for meetings you will take during this block.
    a. Select **Scheduled and Drop-ins** if you will be using the kiosk/waiting room features, and you plan to take drop-ins between appointments.
    b. Select **Scheduled Appointments Only** if you will not take any drop-ins.
    c. Select **Drop-ins Only** to show the time as available to students but disallow anyone from making appointments in advance.
8. Select **How long?** meetings can be by selecting a minimum and maximum duration. If the minimum and maximum are identical, the student will not be given a choice of duration. *Note that institution settings for specific appointment reasons may override your settings.*
9. If your role has permissions to add more than one **Appointment Type**, you will see the checkboxes that allow you to select which types apply to this block of time. Appointment Types dictate:
    a. Which students can schedule during this time (based on the role that connects you with the student)
    b. The appointment reasons shown to students
    c. Which **SpeedNotes** will display
    d. Which roles can view the appointment and the notes you input
10. At the bottom of the form, use the Instructions box to enter instructions to students scheduling with you during this block of time. Instructions are required for blocks that allow Drop-ins.
    a. Example Messaging:
    “Thank you for scheduling a meeting with me. This appointment will be in-person in [Location]. When you arrive, please [include any directions you wish to share on arrival protocols]. I look forward to meeting with you!”
11. Optionally, select the **Start/End Date** tab to set a time frame for a repeating office hour block. For the End Date, you may choose: Never, End of Term, on a specified date, or after a specified number of occurrences. <u>We recommend selecting End of Term</u>.
12. Select **Submit** to save your Office Hour block. This will send you a meeting invite from Starfish to your Outlook Email/Calendar.
    a. If you do not wish to have your Starfish Office Hours reflected on your Outlook Calendar, go to your **Appointment Preferences** and uncheck the box “Change to my Office Hours and Group Sessions” under Calendar Sync.

## Setting up office hours through Home tab

1. From the menu, select **Home**.
2. Select **Office Hours** on your Starfish home page. The **Add Office Hour** form will display


3. The **Title** for this block of time displays as "Office Hours" by default. You can change the **Title** to help you or others managing your calendar identify different types of office hours.
4. Select **What day(s)?** and indicate any recurrence (e.g. **Repeats every** 1 week, every Monday, etc).
5. Use the **What time?** fields to enter the start and end time for the office hours.

6. Select **Where?** meetings will be held using the checkbox(es) next to your location(s). If you choose more than one location, the student will be able to choose their preferred location for the meeting. To add additional location options, go to the **Appointment Preferences** page of your *Profile*.
7. Select the **Office Hour Type** dropdown for meetings you will take during this block.
    a. Select **Scheduled and Drop-ins** if you will be using the kiosk/waiting room features, and you plan to take drop-ins between appointments.
    b. Select **Scheduled Appointments Only** if you will not take any drop-ins.
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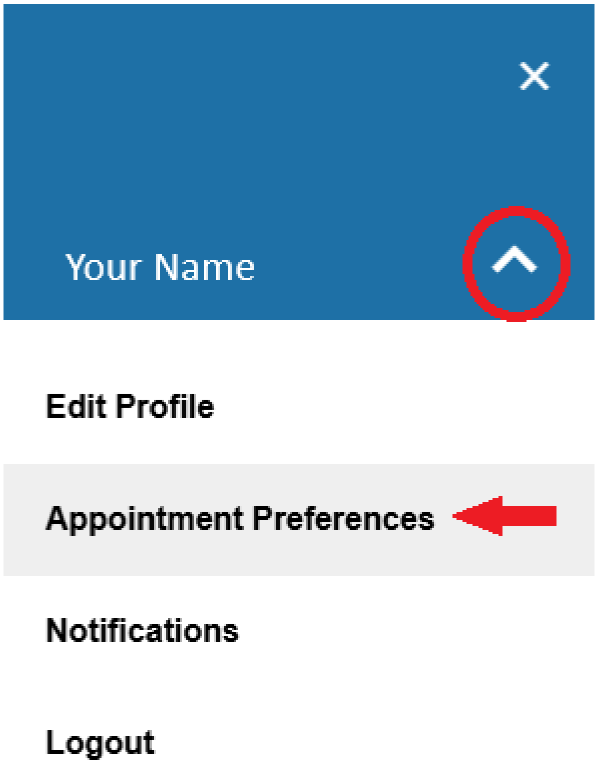
12. Select **Submit** to save your Office Hour block. This will send you a meeting invite from Starfish to your Outlook Email/Calendar.
    a. If you do not wish to have your Starfish Office Hours reflected on your Outlook Calendar, go to your **Appointment Preferences** and uncheck the box "Change to my Office Hours and Group Sessions" under Calendar Sync.

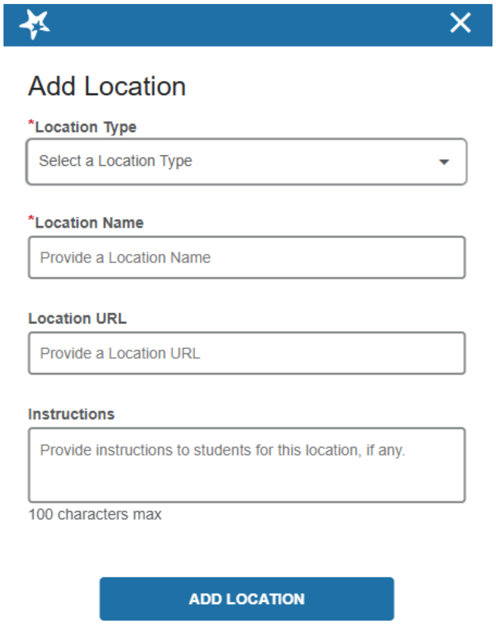
## Updating Your Office Hour Locations

*Updating Location Before Setting up Your Office Hours*

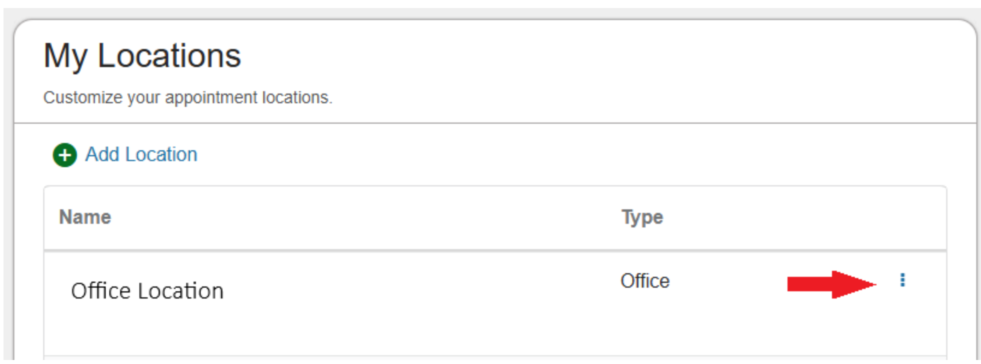
1. Log into Starfish
2. Click the **menu** button
3. Click the arrow next to your name – from the drop-down menu, click **Appointment Preferences**

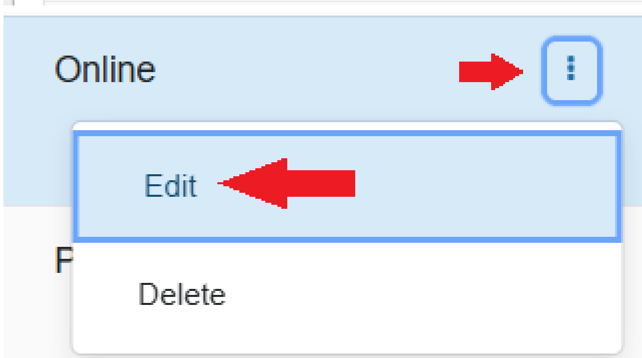



4. Scroll to the **My Locations** section
5. Click **"+ Add Location"**
    a. Complete **Location Type** and **Location Name** and click **Add Location** to finalize

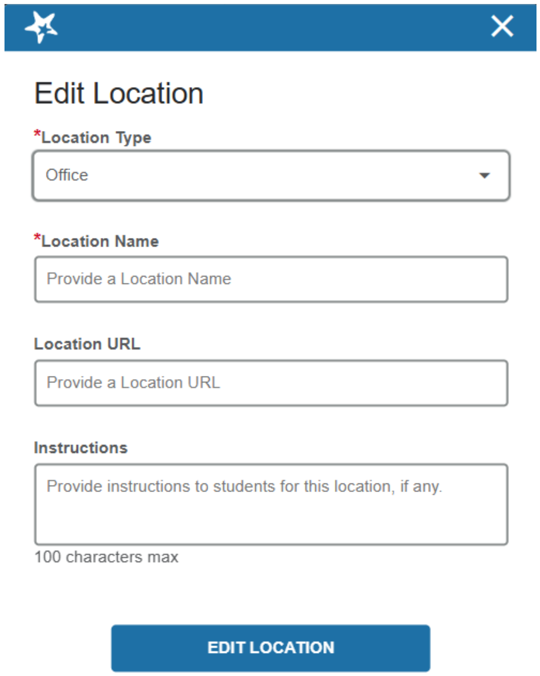



6. Or to edit your existing location:
   a. Click the **three dots** next to the location you wish to edit. From the menu that pops up, click **Edit**.




   b. Update the information you see in the box that pops up to the correct location information and click **Edit Location** to finalize



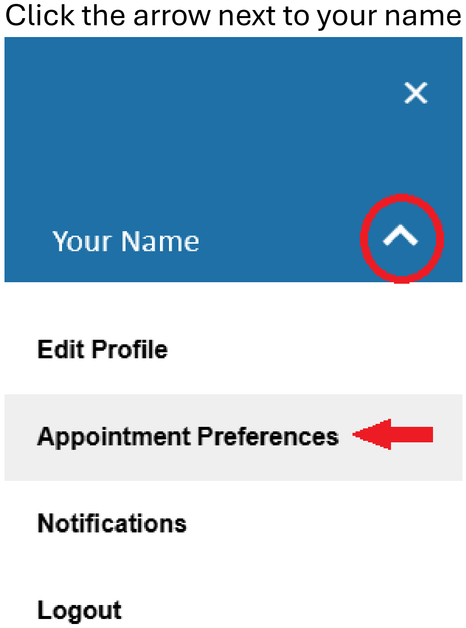

7. Click **Save Changes** at the bottom of the page (don’t forget this step)

You are now ready to create your office hours with your updated office hour location(s).

*Updating Location of Office Hours That Have Already Been Setup*
(Note: This involves two easy parts)

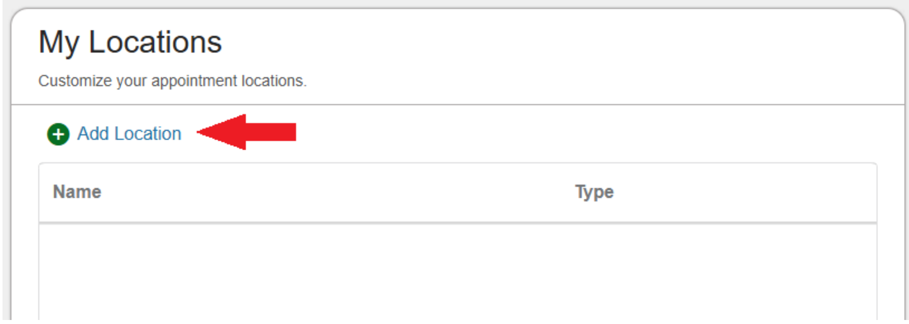
**<u>PART ONE</u>**

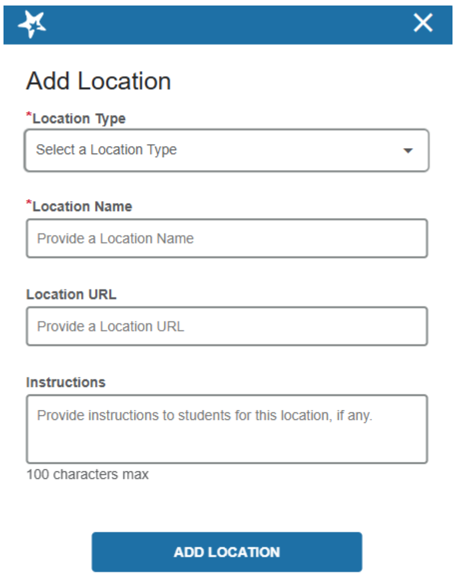
1. Log into Starfish
2. Click the **menu** button
3. Click the arrow next to your name – from the drop-down menu, click **Appointment Preferences**




4. Scroll to the **My Locations** section

5. Click **"+ Add Location"**
    a. Complete **Location Type** and **Location name** and click **Add Location** to finalize

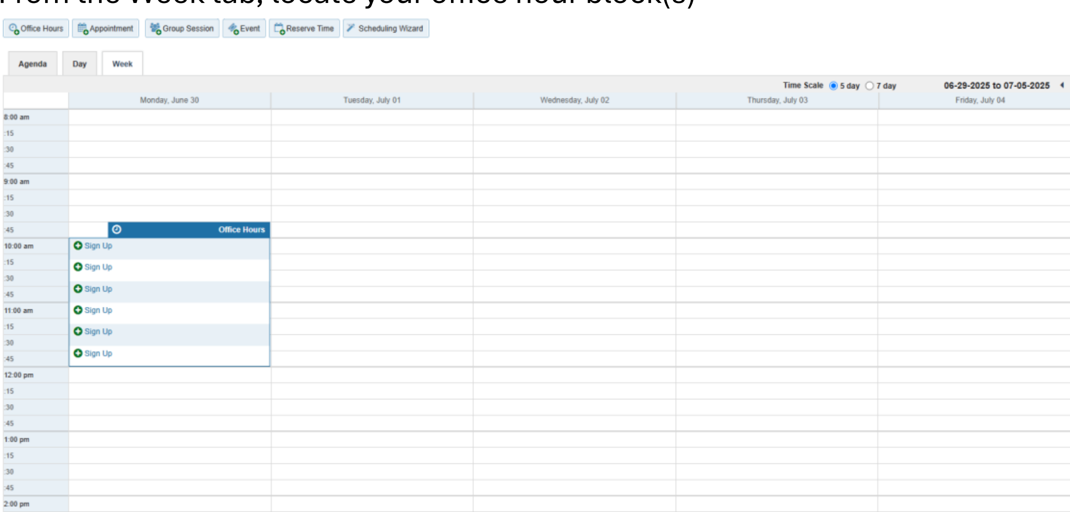


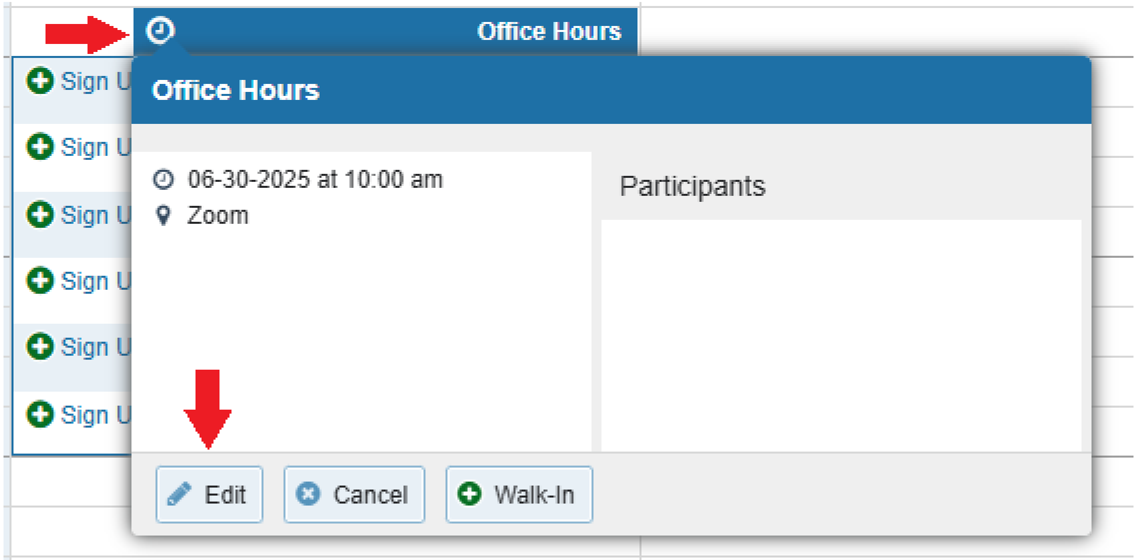

6. Click **Save Changes** (don't forget this step)

**<u>PART TWO</u>**

1. Click the **menu** button
2. Click **Appointments**
3. From the Week tab, locate your office hour block(s)




4. Hover over the clock with your mouse. From the pop-up box that appears, click **Edit**



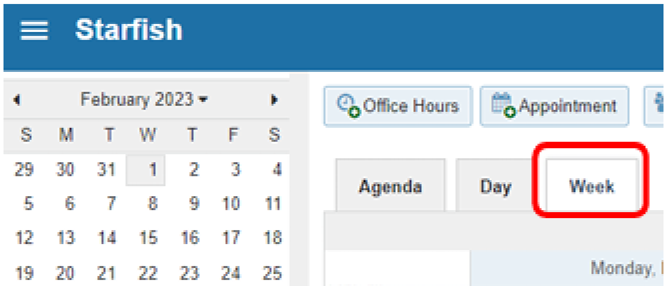

5. Under the **Where?** section, you will see your new location
6. Un-check your old location and add a checkmark to your new location
7. Click **Submit**

Repeat this for additional office hour blocks you may have.

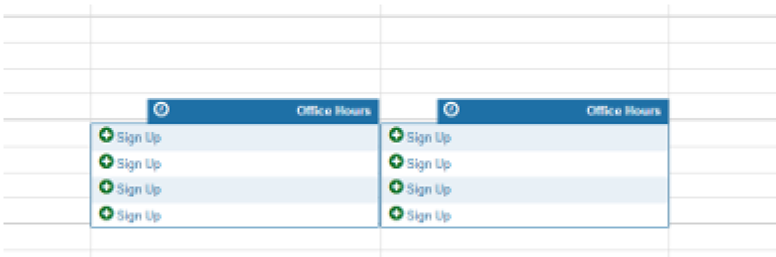
## Updating Pre-Existing Office Hours in Starfish

Follow these steps to update pre-existing Office Hours in Starfish:

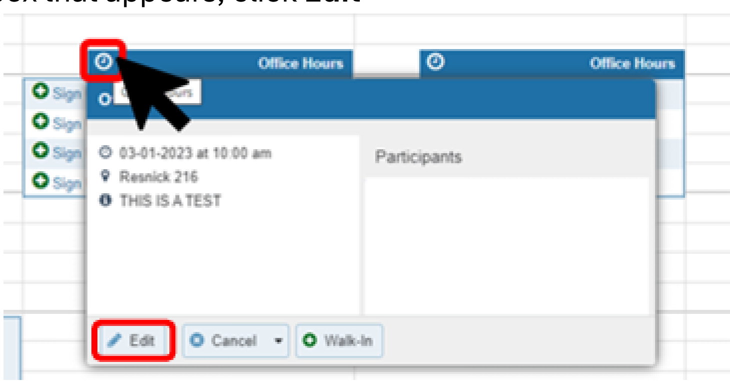
1. Log into Starfish
2. Click the **menu** button
3. Select the **Appointments** option
4. Make sure you are on the Week tab




5. Find the block of office hours you wish to edit




6. Hover over the block of the office hour block you wish to edit with your mouse. From the pop-up box that appears, click **Edit**




7. From here, you can edit any office hour information
8. Once edited, click **Submit**

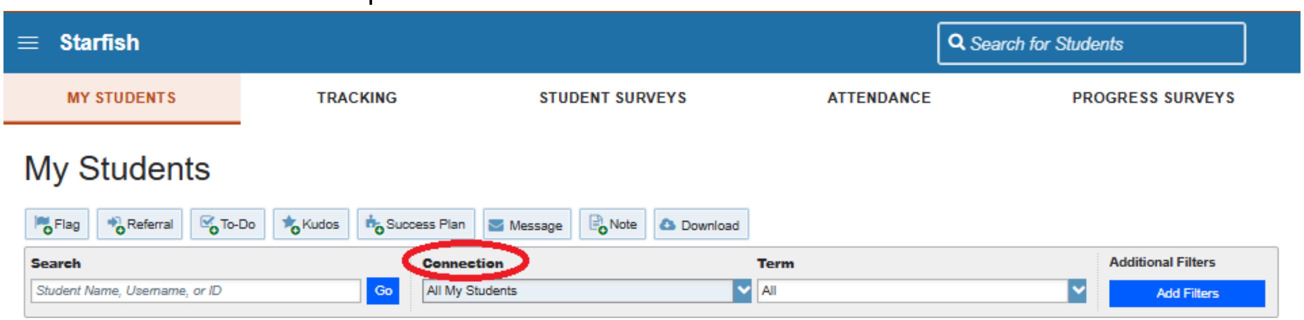
Repeat this for additional office hour blocks you may have.

# Connections

Starfish connects users to certain students based on Roles (also known as Connection). Most users are connected to students 1:1 through Advisor Role or Course Instructor Role. However, there are many other types of connections available in Starfish that allow a user to be connected to a large group of students based on other broader factors (i.e., All undergraduate students; all students in [X] program; etc.). Your ability to see a student in Starfish, and what you can view in a student profile, is determined by the Role you have to them.

## View Your Connections

1. Log into Starfish
2. Click the **menu** button
3. Select the **Students** > **My Students**
4. View the **Connections** drop-down

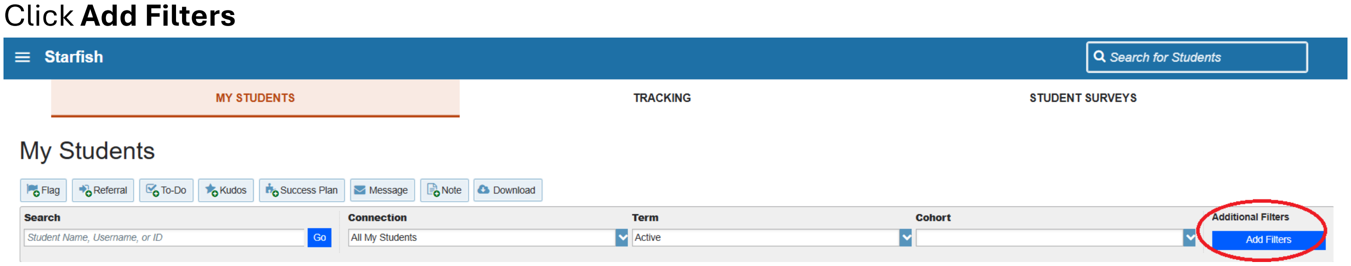



Take note of the Connection that is selected. Starfish will typically default to All My Students, so please always be mindful what is selected here if you are taking any action. If you are connected to students in more than one way, All My Students is a Cumulative list of all students among ALL roles. To view students based on a certain role, open up the Connection drop-down and select the role. NOTE: *For Instructors*: Make sure the Term drop down is selected to Active to only see your current class rosters.

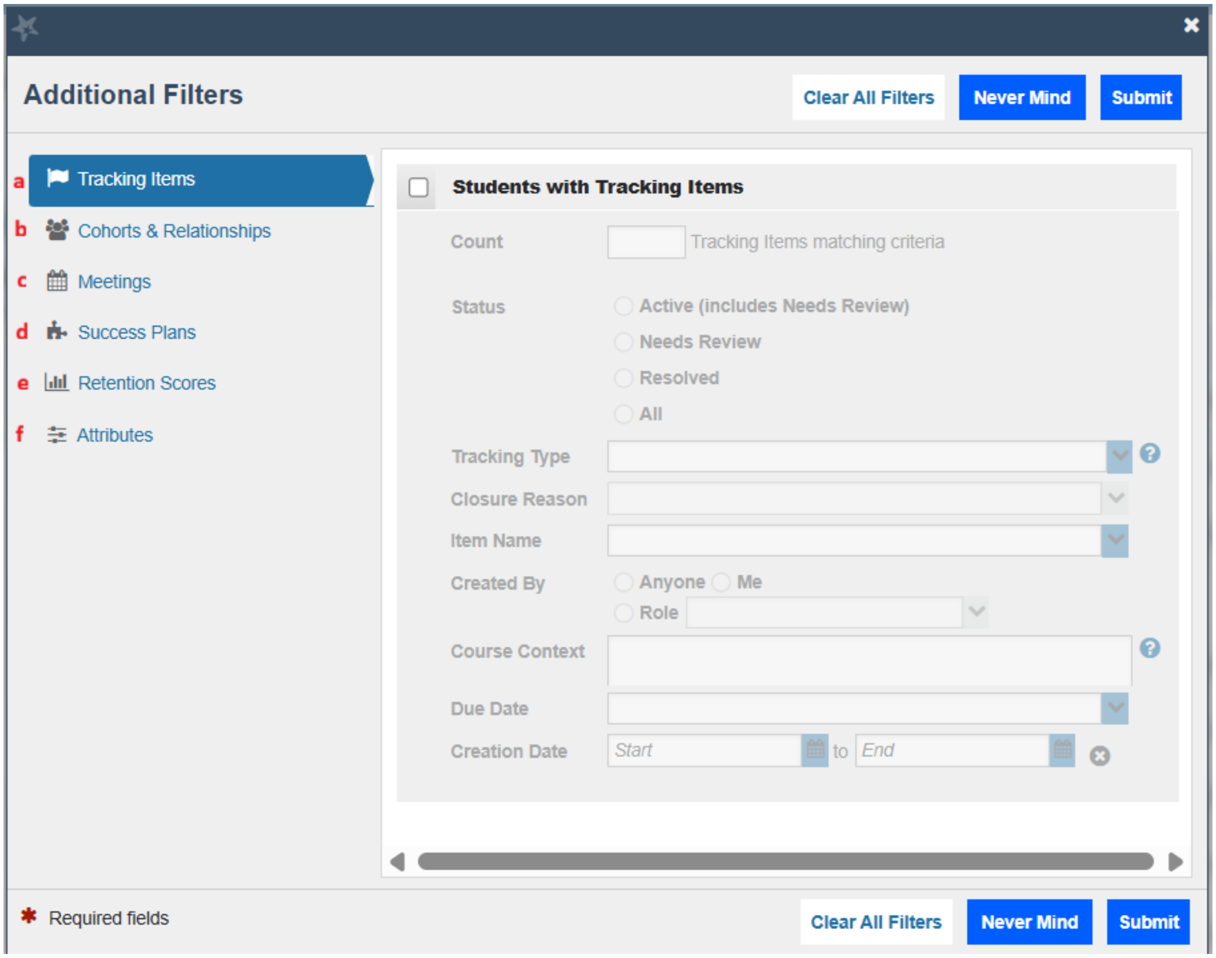
## Additional Filters through Your Connections

You have the ability to filter your list of students based on certain criteria to allow you to do targeted outreach.

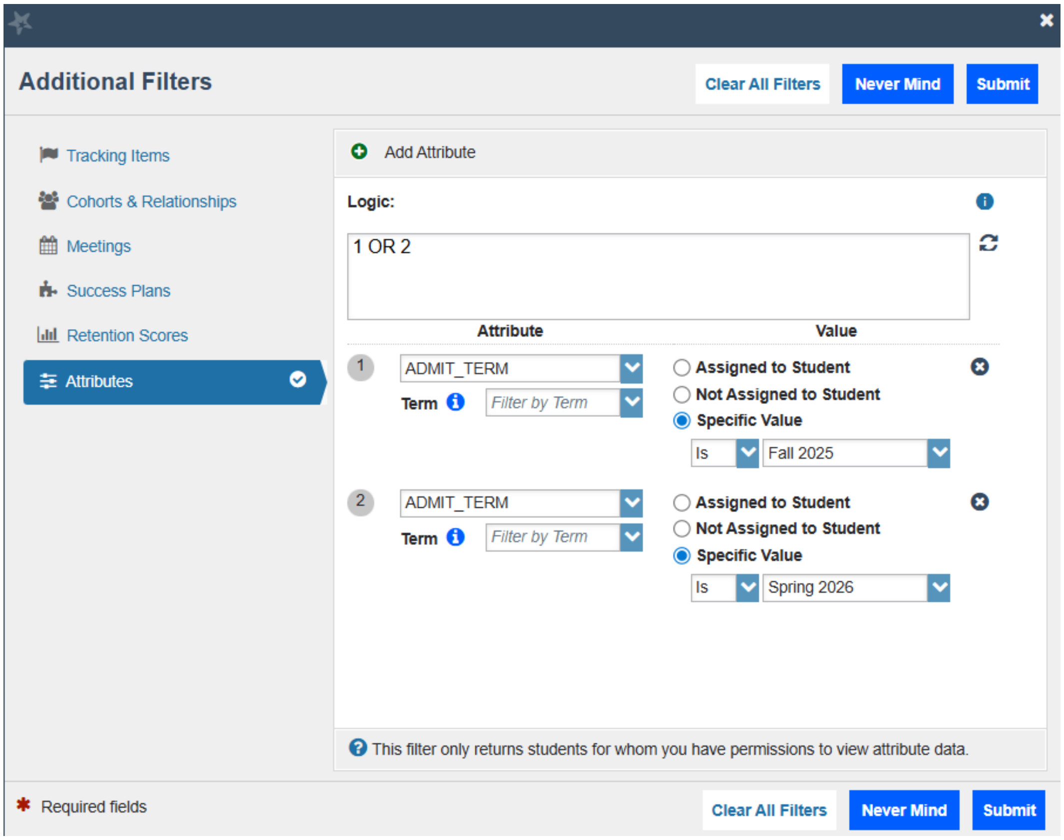
1. Log into Starfish
2. Click the **menu** button
3. Select the **Students** > **My Students**
4. Click **Add Filters**

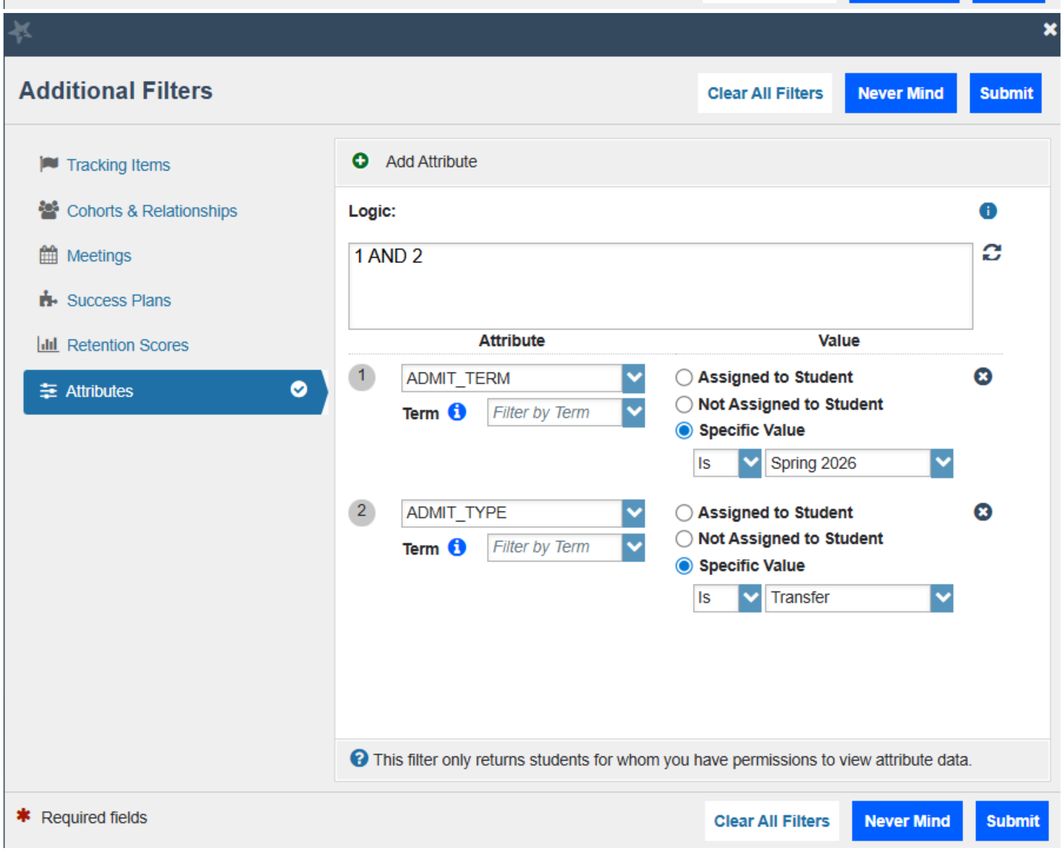



5. Apply Filters as appropriate




a. Filter by Tracking Items allows you to search your students based on Flags, To-dos, Referrals, etc. NOTE: It is best to use the Tracking Tab to search Tracking Items, not the Students Tab.
b. Filter by Cohort & Relationships allows you to search your students based on the connection you have to them. NOTE: This filter can also be updated on the Students Tab by selecting a certain Connection type.
c. Filter by Meetings allows you to search your students who have or have not scheduled meetings with you.
d. Filter by Success Plans allows you to search your students with specific success plans.
e. Filter by Retention Scores allows you to search your students by their Starfish Retention Score. NOTE: This ability is not allowed until a user has gone through the Starfish basics training and the Starfish Retention Scores training.
f. Filter by Attributes allows you to search your students based on a wide variety of attributes. Attributes have been created by the institution to meet the needs of the users. NOTE: Add "AND" or "OR" Logic to combine multiple attributes to refine your search even further.


Additional Filters
Clear All Filters
Never Mind
Submit
Tracking Items
Cohorts & Relationships
Meetings
Success Plans
Retention Scores
Attributes
Add Attribute
Logic:
1 OR 2
Attribute
Value
1
ADMIT_TERM
Term
Filter by Term
Assigned to Student
Not Assigned to Student
Specific Value
Is
Fall 2025
2
ADMIT_TERM
Term
Filter by Term
Assigned to Student
Not Assigned to Student
Specific Value
Is
Spring 2026
This filter only returns students for whom you have permissions to view attribute data.
Required fields
Clear All Filters
Never Mind
Submit


Additional Filters
Clear All Filters
Never Mind
Submit
Tracking Items
Cohorts & Relationships
Meetings
Success Plans
Retention Scores
Attributes
Add Attribute
Logic:
1 AND 2
Attribute
Value
1
ADMIT_TERM
Term
Filter by Term
Assigned to Student
Not Assigned to Student
Specific Value
Is
Spring 2026
2
ADMIT_TYPE
Term
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Assigned to Student
Not Assigned to Student
Specific Value
Is
Transfer
This filter only returns students for whom you have permissions to view attribute data.
Required fields
Clear All Filters
Never Mind
Submit

# Meeting Notes

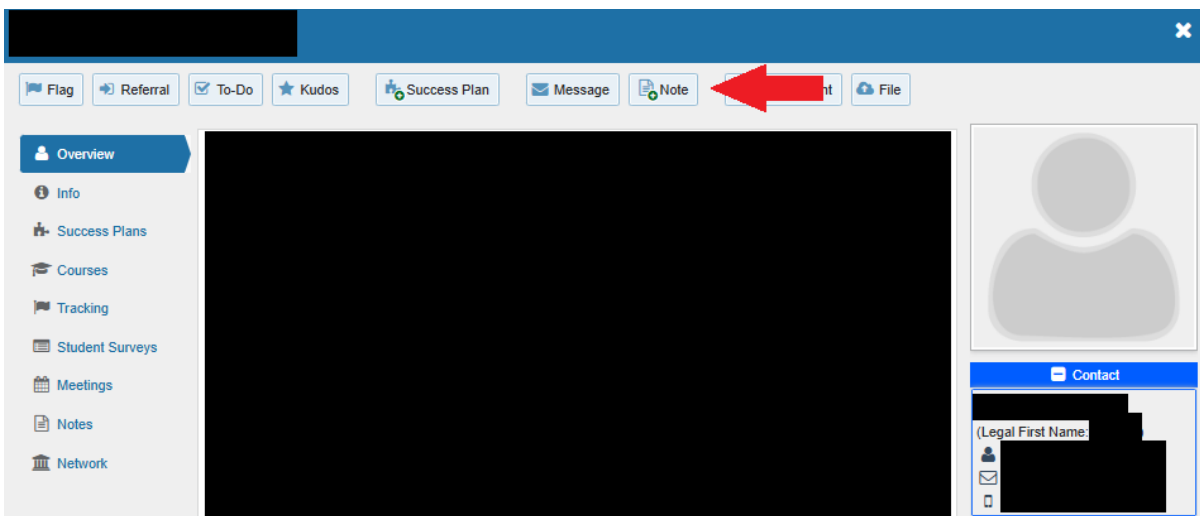
## Taking “Notes” in Starfish

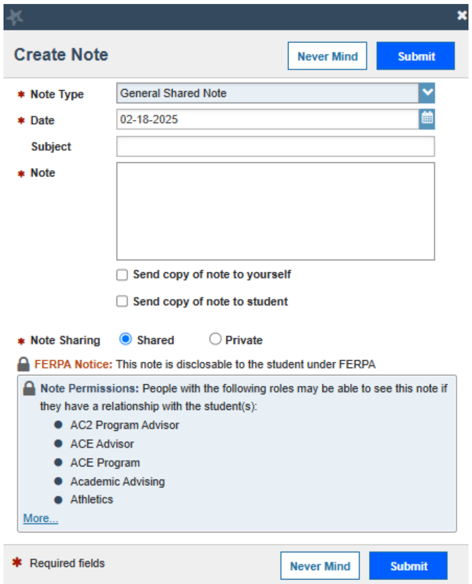
Taking notes after you’ve met with a student benefits you, the student, and any other advising units on campus that work with the student. With large advising caseloads and other professional responsibilities, there is no way for you to remember everything. Taking detailed notes serves the following important purposes:

(1) It documents and reminds you about past advising guidance you have offered.
(2) It provides other advising partners with important contextual information that allows them to coordinate their advising with yours.
(3) It ensures seamless continuity to students because everyone working with them is operating from a shared set of information.

There are two types of notes in Starfish:

1) **Note**: This type of note is useful for documenting an unplanned interaction with a student, the contents of which you think would be useful to share with the student’s other advisors and support resources.



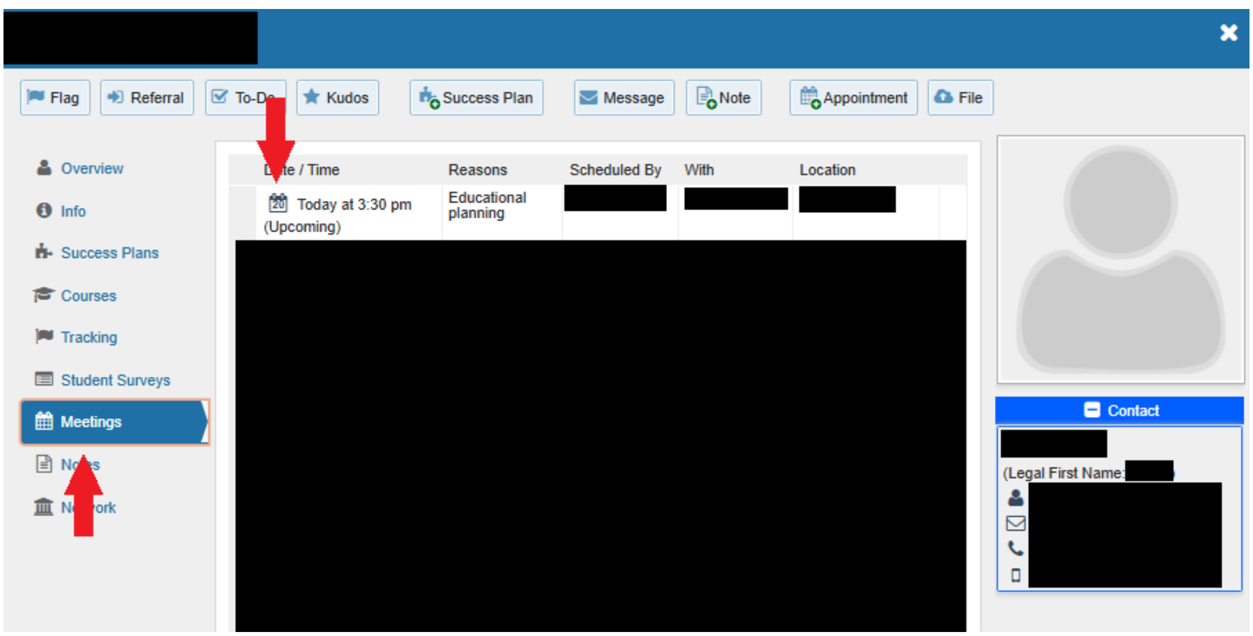


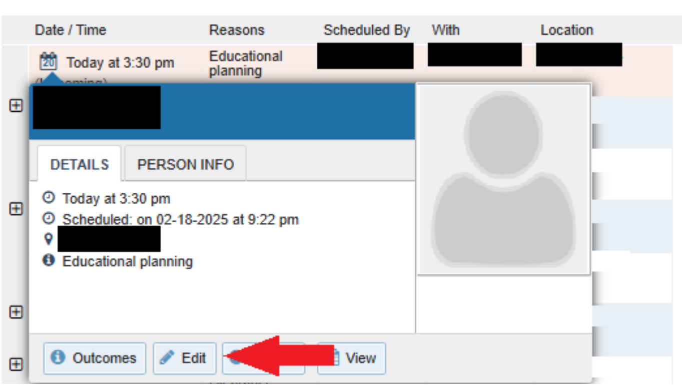

You can send a copy of your note to yourself, which you will receive it by email. You can also send a copy to the student, which you should do if there was important information discussed in your meeting that you believe it is important to share with the student. The student will receive the note via email.

The “Notes Permissions” box shows you who else can view your note. If you wish to document an interaction with a student but do not want others to see the contents of your note, mark it as “Private” under “Note Sharing."

Once you have clicked “Submit,” you can review this note, and all other notes under the “Notes” tab on the student’s profile.

2) **Notes from a Scheduled Meeting**: Utilizing the Starfish Scheduling function, you can document a conversation that took place in a pre-scheduled meeting with a student.



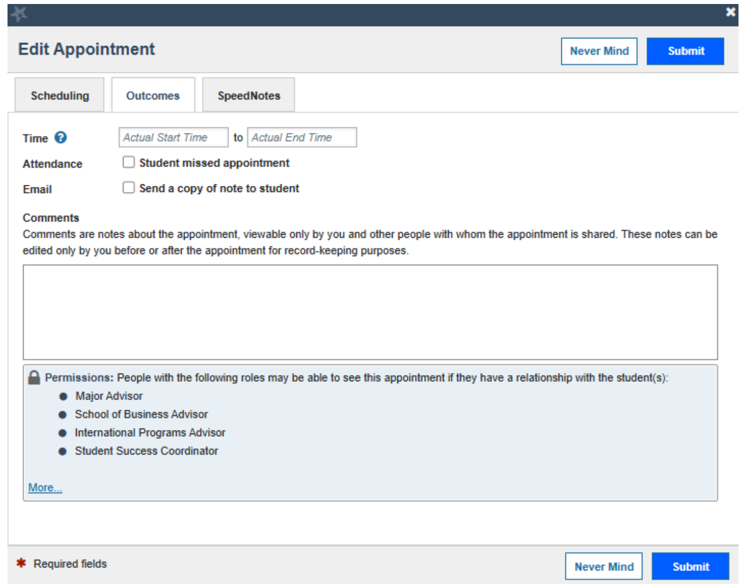



When reporting your notes on an appointment, you can record the start and end times of the meeting (optional).

Type your comments into the Comments box. The more detailed your notes, the more helpful they will be for you and others to reference in the future.

Depending on the appointment type (could vary based on department), you can see the individuals/roles on campus that can see your meeting notes.

As with general notes, you have the option to share the note with the student.

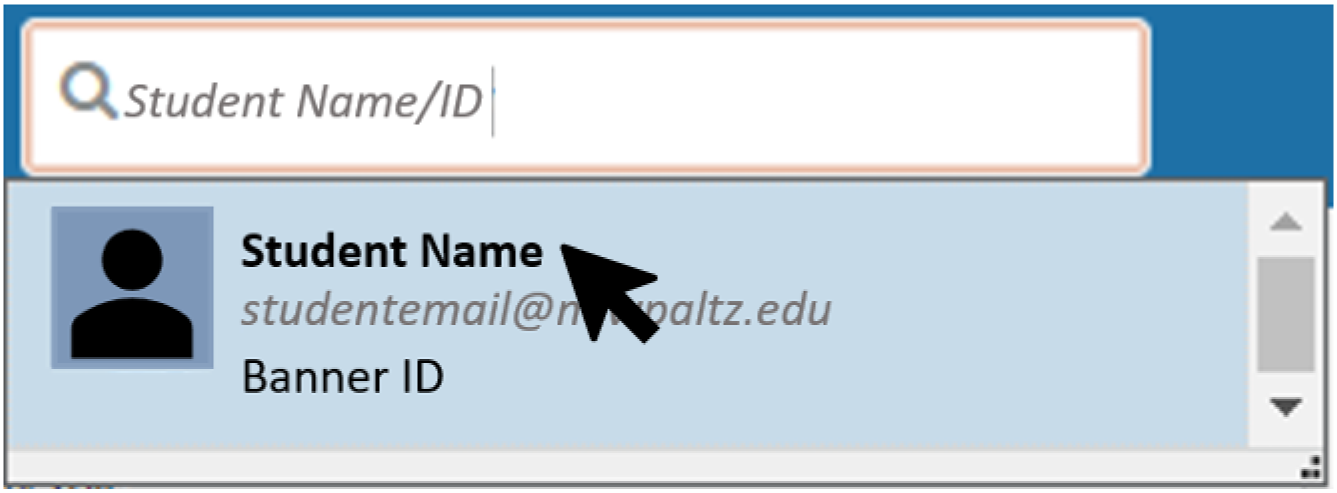


# Messaging your students

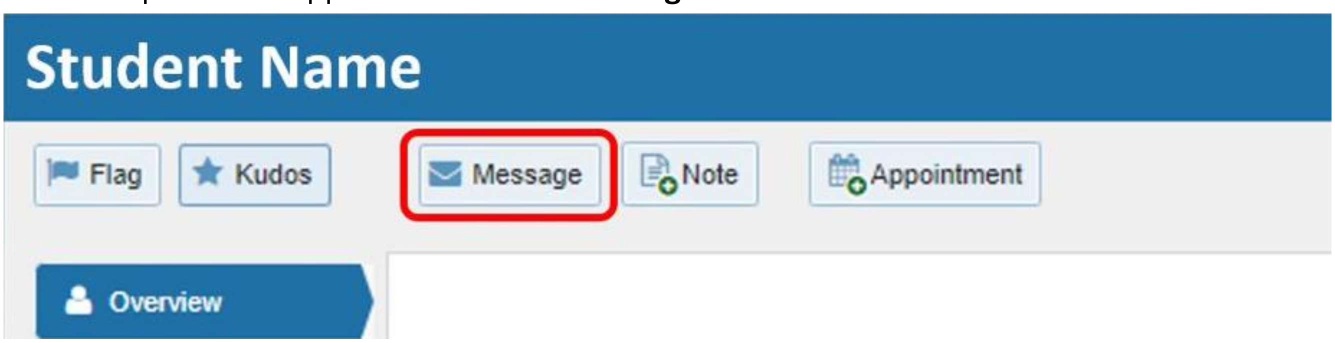
## Messaging students *individually*

1. From *any* screen in Starfish, click the search bar (upper right corner of the screen)

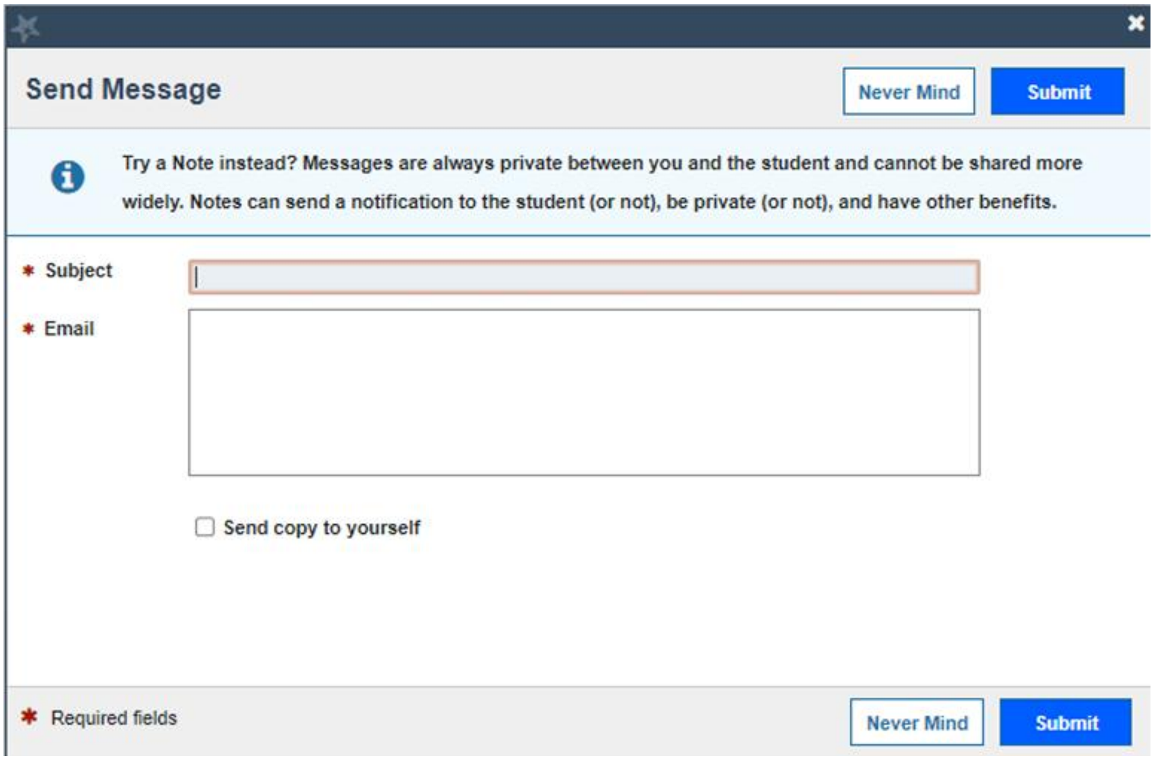

2. Type in the student's name, or Banner ID, or their @newpaltz.edu email address
3. Starfish will bring up the student. Click on the student's name




4. Students' profile will appear. Click on the **Message** button




5. A message box will pop-up




6. Input a subject line for your message in the **Subject** section
7. Input your message to the student in the **Email** section
8. Click **Submit**

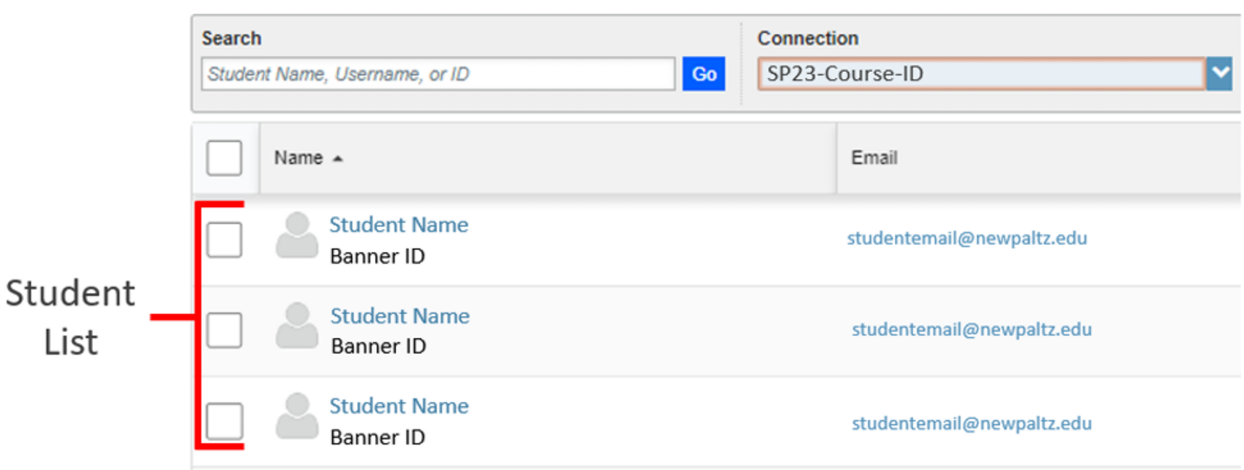
## Messaging students in bulk

1. Click on the **menu** icon
2. Select **Students**
3. Make sure you are on the **My Students** tab

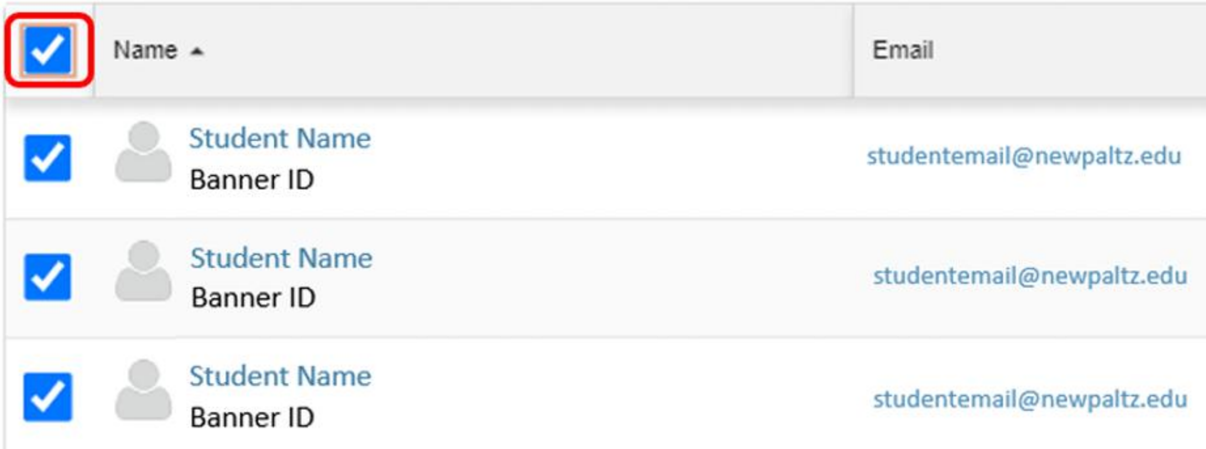

4. Under **Connection**, select what group of students you would like to message.

   For this example, we will be messaging all students in a course we teach, so we will select that specific course from the **Connection** drop-down

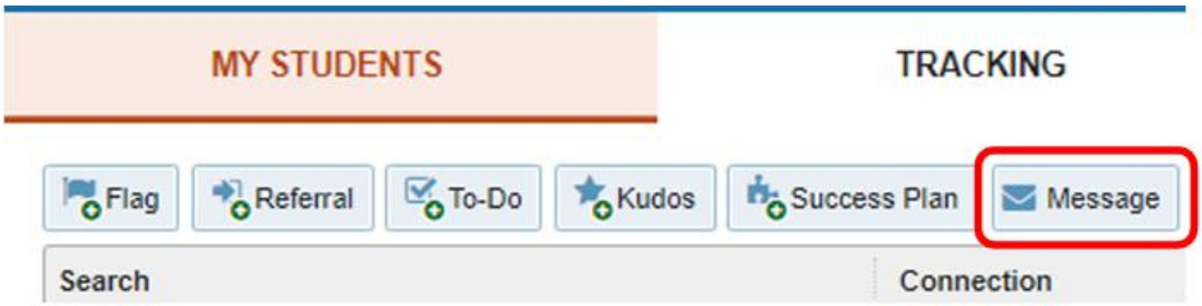

5. Once your connection is selected, the students within that connection will appear on the list



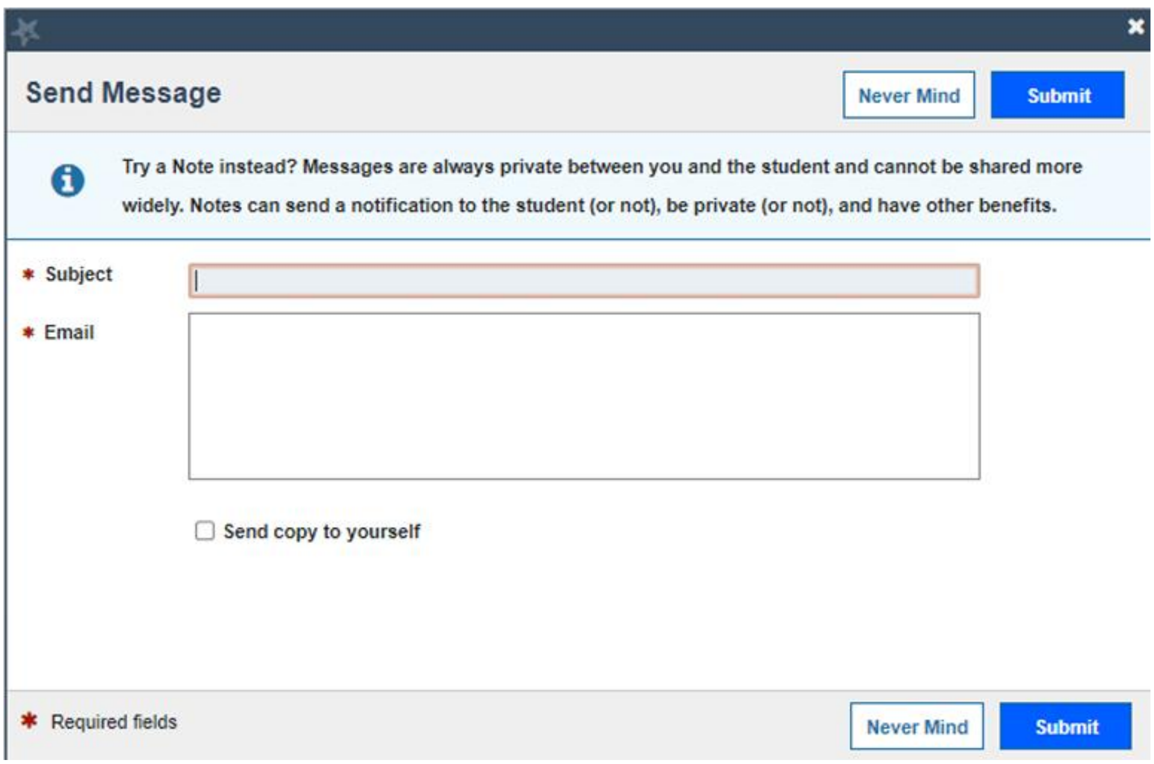

6. Click the box on top of the list to select ALL students within that connection




7. Once all students in the connection are selected, click **Message** button




8. A message box will pop-up

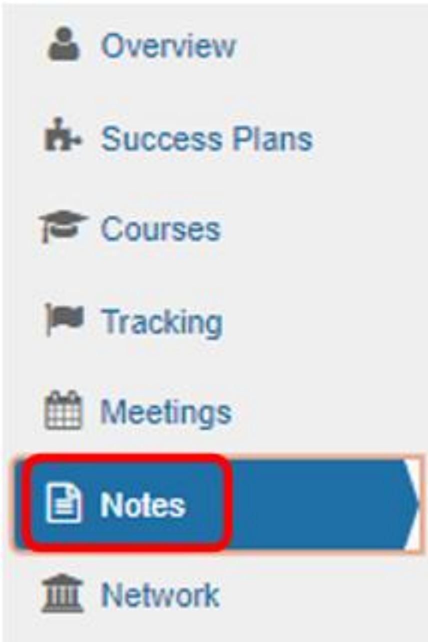



9. Input a subject line for your message in the **Subject** section
10. Input your message to the student in the **Email** section
11. Click **Submit**

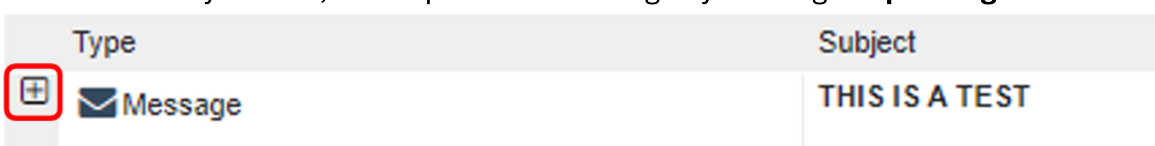
## View Read Receipts

Starfish can track whether or not the student has opened your message if you've sent it through the system.

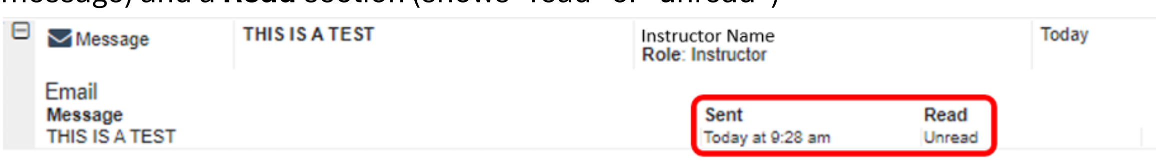
1. Open the student's **Student Profile**
2. Click **Notes**




3. Find the email you sent, and expand the message by clicking the **plus sign**



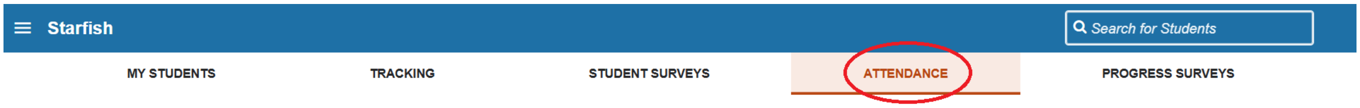

4. Once the message is expanded, you will see a **Sent** section (lists the date and time you sent the message) and a **Read** section (shows "read" or "unread")



# Tracking Attendance

## Tracking Attendance

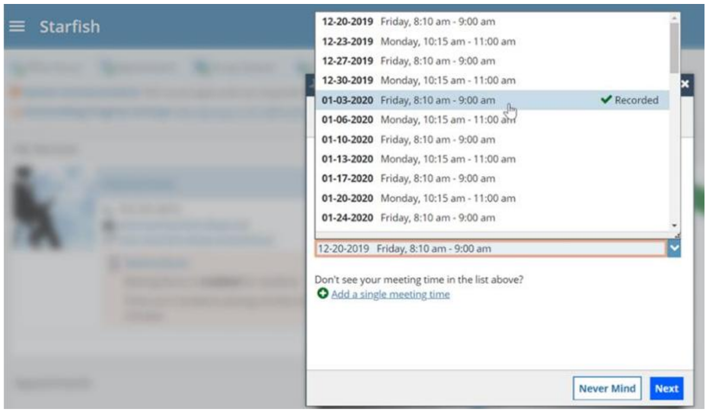
1. Log in to Starfish
2. Click on the **menu** button, then select the **Students** option
3. Click on the **Attendance** tab




4. Click the **Record Attendance** button
5. A window will pop up
   a. Under the **Section** drop-down, select the course section you wish to record attendance
   b. *If you have meeting times set-up:*
      i. Under **Meeting Time**, select the meeting time for the section
   c. *If you DO NOT have meeting times set-up:*
      i. Under **Meeting Time**, click **"Set up meeting times now"**
      ii. Input the days & times the course meets
      iii. Click **Submit**
      iv. Follow the steps from "B"
   d. Click **Next**
6. After clicking **Next**, your course roster will display
7. By default, all students are marked as present. Using the buttons (**Present, Absent, Excused, Tardy**), mark the students appropriately
8. Click **Save**

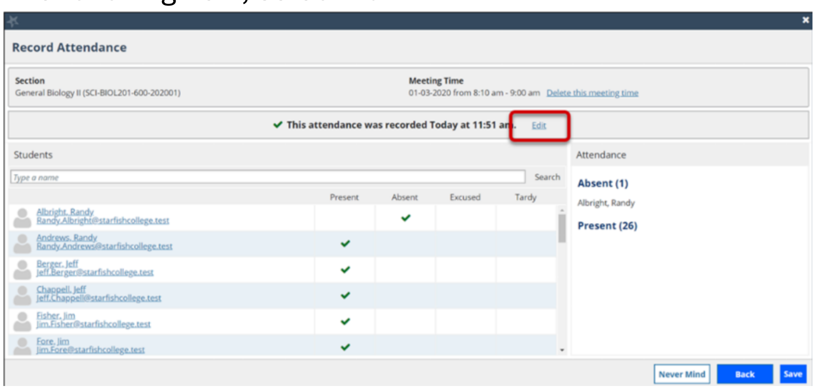
## Edit Previously Recorded Attendance

1. From the **Attendance** tab (on the **Students** page), select **Record Attendance**.
2. A window will pop up.




   a. Under the **Section** drop-down, select the recorded meeting time
   b. Select **Next**

3. After clicking next, select **Edit**.



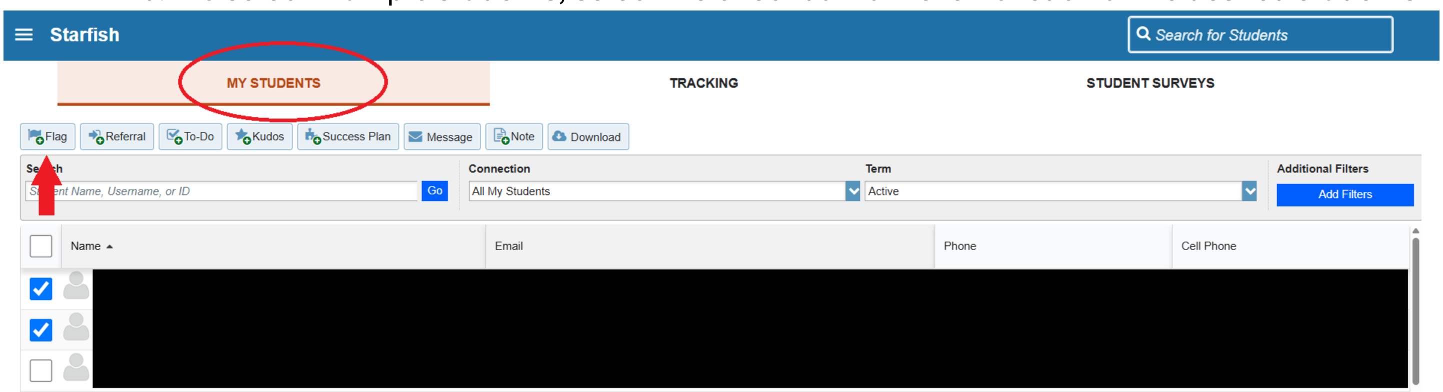

4. Make the appropriate changes then click **Save**.

# Raising Tracking Items (Flags, Kudos, Referrals)

## Raise a Tracking Item (Flag/Kudo/Referral)

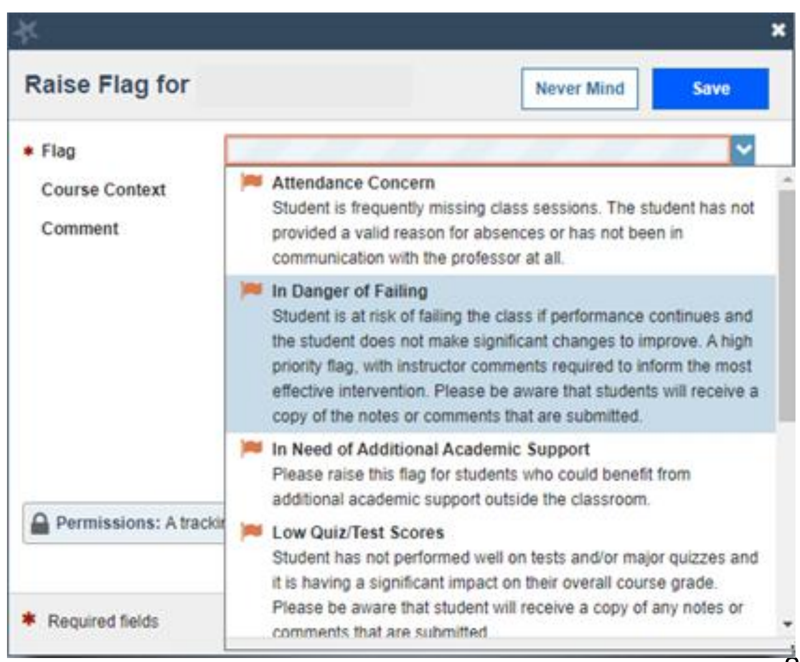
When you have feedback or a concern with a particular student, you can raise a flag, kudo, or referral through Starfish to communicate your observations. The appropriate individuals will automatically be notified when you save the item.

1. From the menu, select **Students > My Students** to see your list of students.
2. Find the desired student by typing the name into the **Search** box.
3. Select the desired student(s).
   a. For a single student: click on the student's name to navigate to the student's folder or click the checkbox to the left of the student's name.
   b. To select multiple students, select the checkbox to the left of each of the desired students'




names.

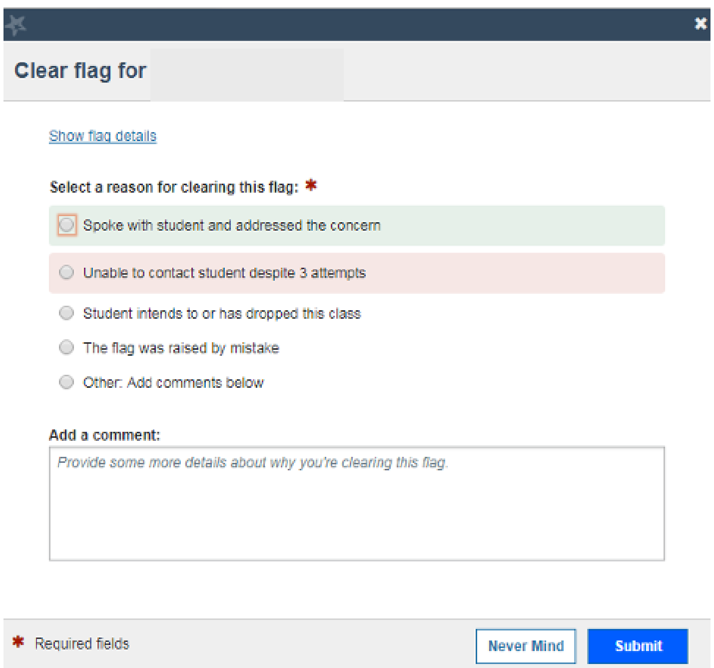
4. Click the desired tracking item **(Flag/Kudo/Referral)** button. A list of alerts that you have permission to raise on this student is displayed.
5. Select the desired alert from the list.
6. If relevant, select a course from the **Course Context** drop down list and enter notes in the **Comment** box.
7. Click the **Save** button.
   Note: The **Student View**: indicates whether the student can view the flag and the notes you include in the **Comment** box.
   The **Permissions** area lists roles that have the permission to view the selected tracking item and the notes you include in the **Comment** box.



## How to Clear Starfish Tracking Item

While Instructors are the primary source of raised flags or other tracking items in Starfish, outreach will be performed by campus support professionals. Students have the ability to work with the individual they feel most comfortable with. Thus, a support professional who interacts with a student may decide that the Starfish flag can be considered “resolved”. It is helpful if those that “resolve” a flag with the student mark it as such and “close the loop” in the Starfish system. This action updates the student’s folder and keeps everyone informed of outreach results.

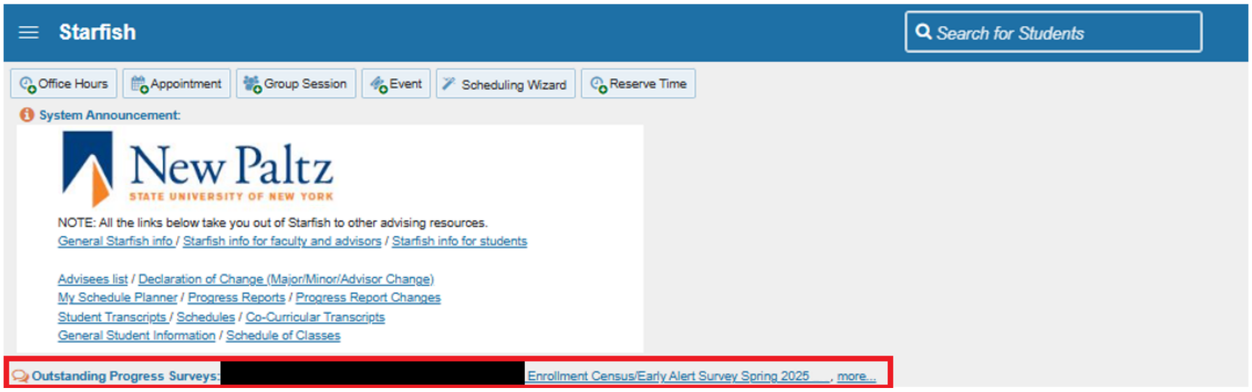
1. From the menu, select **Students > My Students** to see your list of students.
2. Select the **Tracking** tab. This will pull up a list of all active tracking items for your students. You can filter by various criteria. For example, using the “Connections” drop down menu, you can select a specific course. Under the “View” drop down, you can select “Created By Me” to resolve flags you have submitted.
3. Select the students with flags by clicking the box next to their name then clicking the “Resolve” button. Alternatively, hover over the orange flag until the Details box appears. Click “Clear”. This will produce the following dialog box:




4. You will be prompted to select a reason for clearing the flag and enter a comment about why you are clearing the flag. This is beneficial for your record keeping and for other staff who have access to view student flags.
5. This will “resolve” the flag and it will no longer appear as an active tracking item to you, the student, or any other service providers who work with the student.
6. To review flags that you have cleared, simply return to the same screen and sort for “Active and Resolved” item in the View sorting bar.

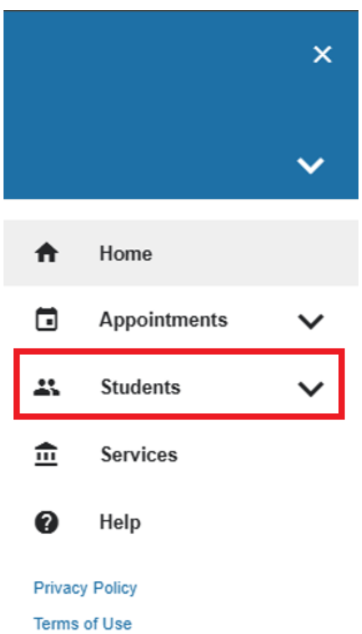
# Completing a Progress Survey

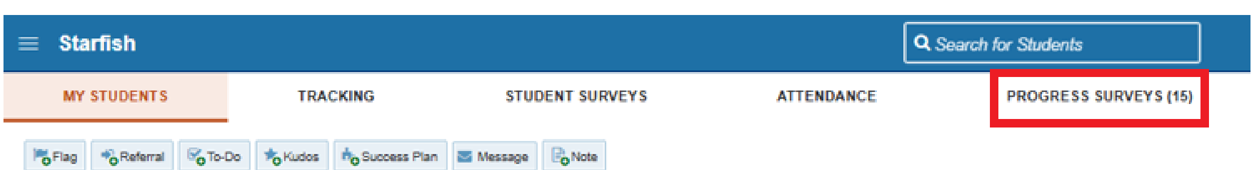
## Completing a Progress Survey

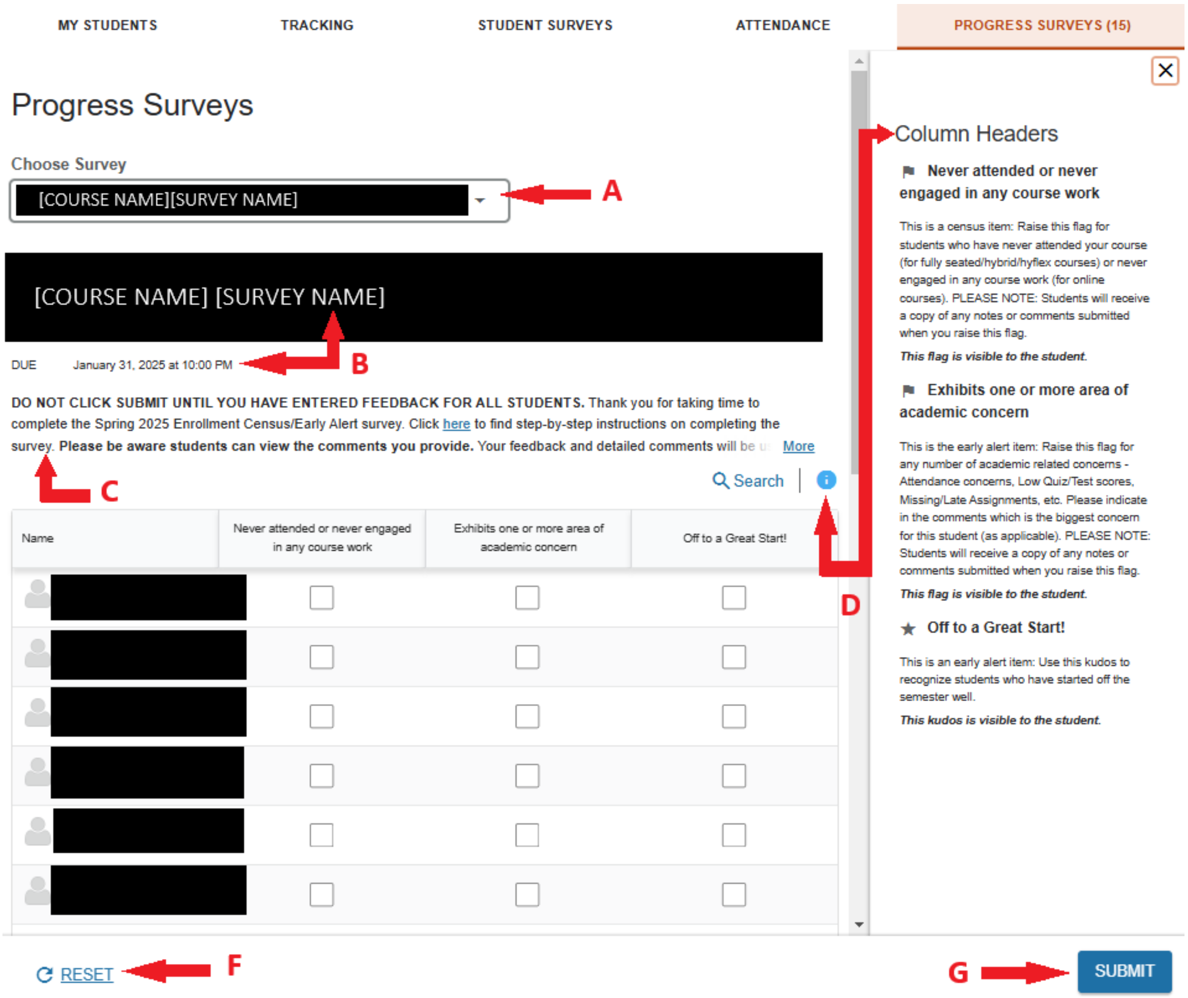



1. Login to Starfish through my.newpaltz.edu with your New Paltz credentials.
2. Your main screen will show “Outstanding Progress Surveys.”
3. Select the link to start the survey.

NOTE: You can also access the survey by clicking the Menu Icon in the upper left corner and selecting “Students,” and then “Progress Surveys.”

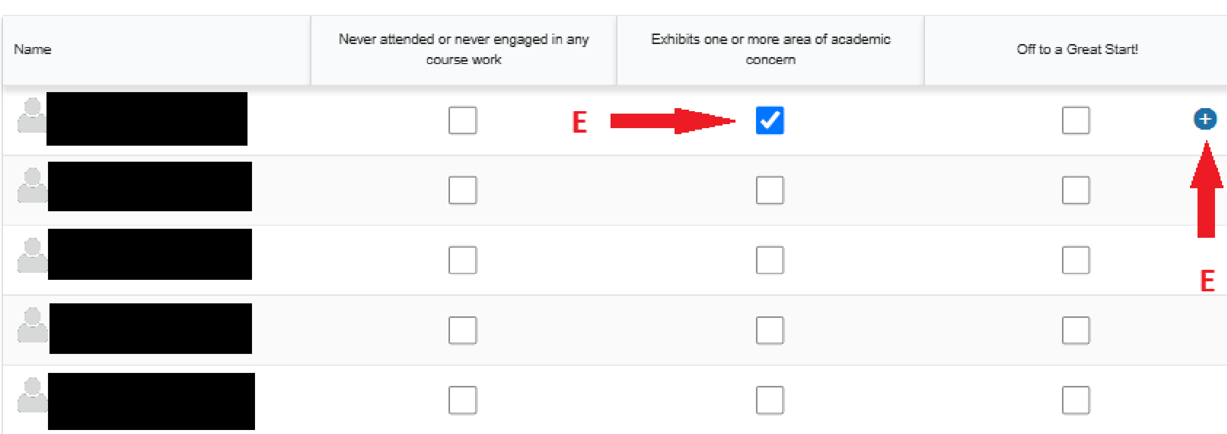





4. Complete your assigned Progress Surveys:

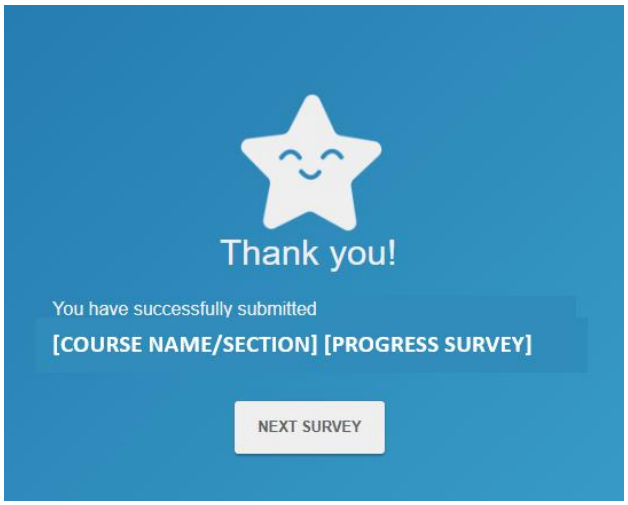
    A. Use this drop down to select the course section for which you are completing the survey.
    B. Displays the title and course information for the selected survey and its due date.
    C. Displays the instructions for the survey.
    D. Displays further details on the columns in the survey.




    E. Check the appropriate box(es) for each student. Comments on survey items may be required based on the survey. If they are optional, click the + to open a field to enter your comments. **NOTE:** If none of the items apply for a particular student, you are not required to check any boxes.

F. Select RESET if you would like to clear ALL the work you've completed so far and start over.
G. When you have finished providing feedback for all students for the selected course, select SUBMIT. You will be unable to re-access the survey once completed.
    - Selecting SUBMIT will submit the progress survey for all students in the entire class section.

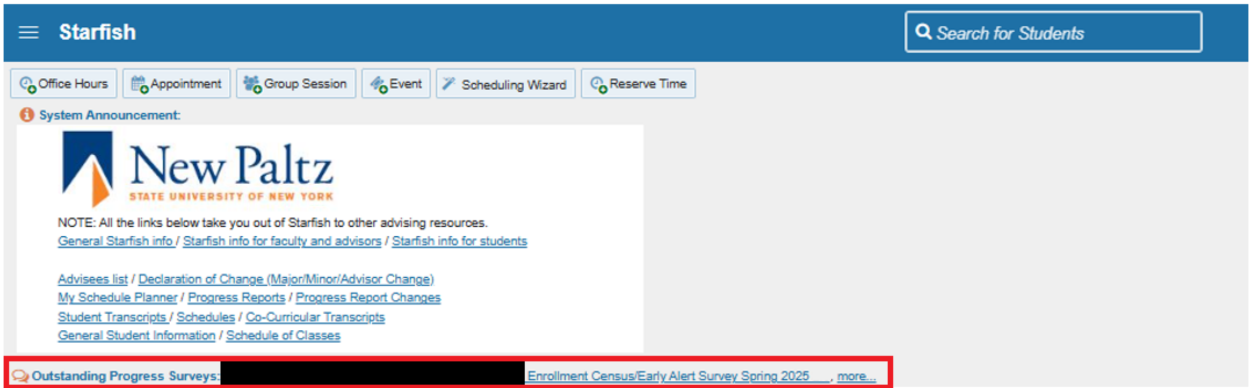
5. A confirmation message displays indicating you have successfully submitted the survey. If you have additional surveys to complete, you will be prompted to proceed to the next survey.



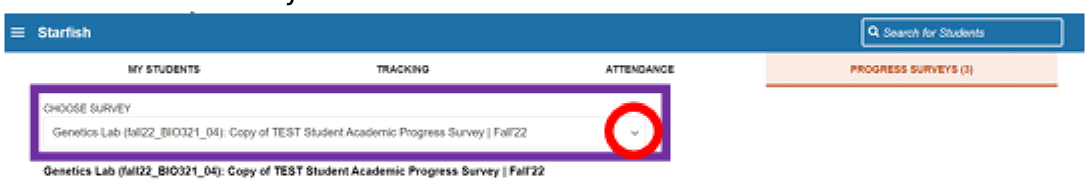
## Submitting a BLANK Progress Survey

If you are co-teaching a course, or are not the primary instructor for a course, please complete a BLANK report.

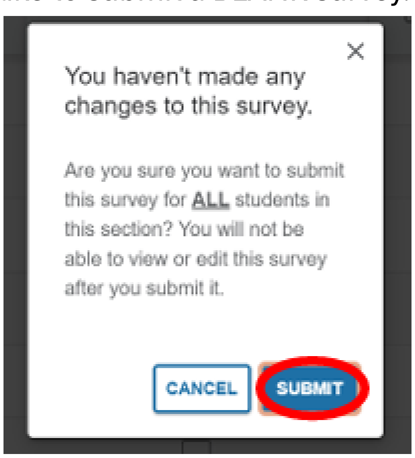
1. Login to Starfish through my.newpaltz.edu with your New Paltz Credentials.
2. Your main screen will show "Outstanding Progress Surveys."




3. Select the link to start the survey.
4. Under Choose Survey, use the drop-down menu to select the co-taught course for which you will submit a blank survey.




5. Make sure NOT to input any feedback for any students.
6. Select the SUBMIT button on the bottom right corner of the screen.
7. After clicking SUBMIT, a notification box will pop-up confirming that you would like to submit a BLANK survey. Click SUBMIT.

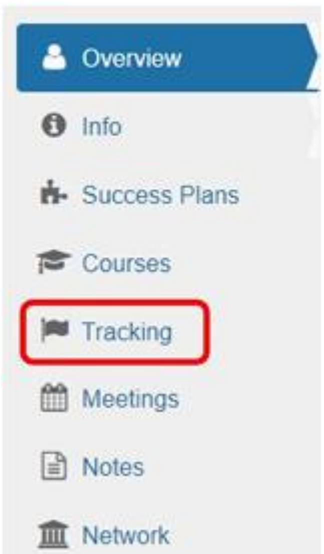

8. A confirmation message displays indicating you have successfully submitted the survey. If you have additional surveys to complete, you will be prompted to proceed to the next survey.

## Accessing Flag Comments

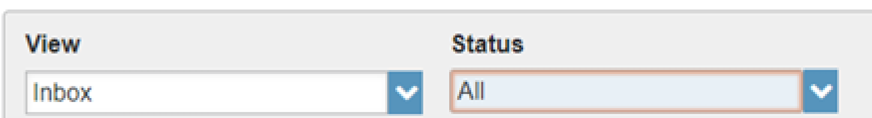
When advisors close a flag, they make sure to add a comment to the flag that goes into detail about why they are closing the flag and what interaction they had with the student. Below are instructions on how you can access the comments that advisors have input:

1) Login to Starfish
2) Type the student name/ID/email in the search bar in the top right corner

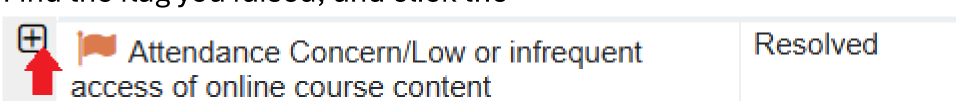

3) The student will pop-up – click on their name
4) Once in the student's profile, click Tracking




5) Make sure you have Status set as "All"




6) Find the flag you raised, and click the "+"



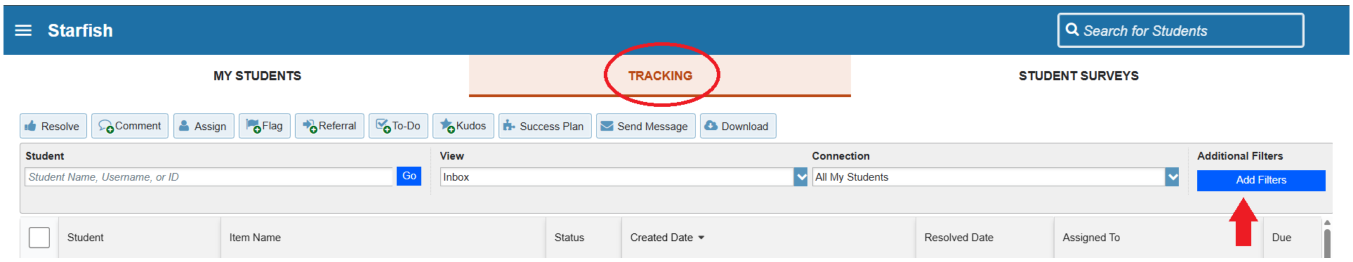

7) Clicking the "+" opens a dropdown of all the comments advisors have added regarding their outreach/interactions with the student

# Managing Tracking Items

## Filtering Open Tracking Items

1. Log in to Starfish
2. Click on the **menu** button, then select the **Students** option
3. Click on the **Tracking** tab

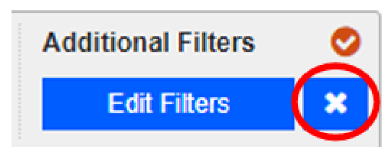
   If any of your students have an open flag, they will appear here.



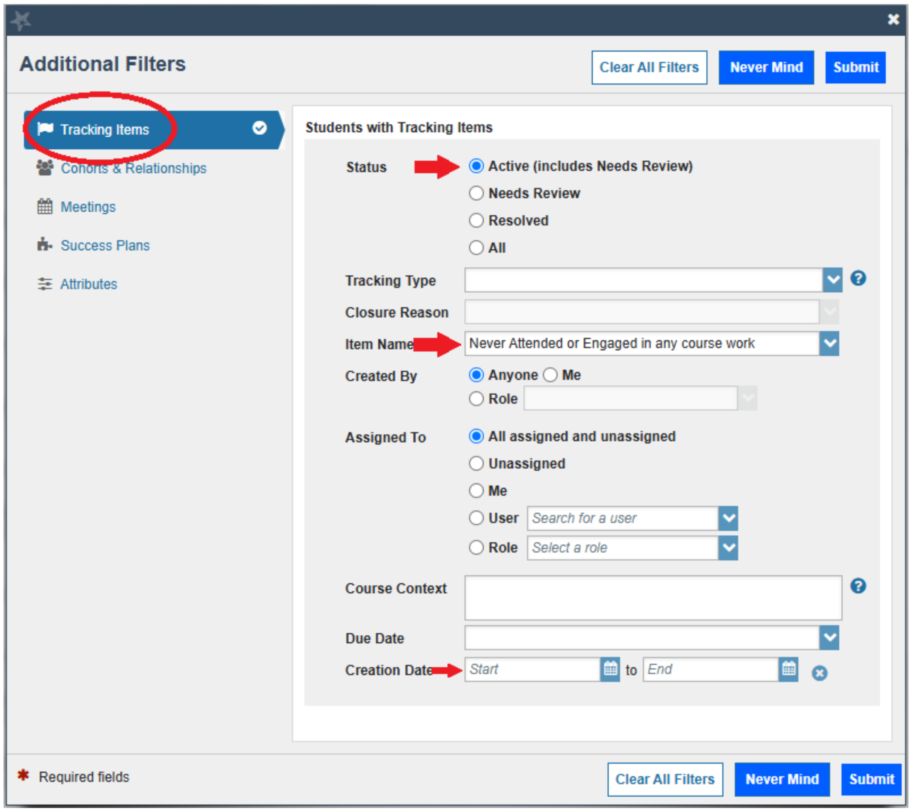

Be sure to change the "**Connection**" drop down and select the specific role you wish to search from. Depending on what roles you have in Starfish, "**All My Students**" may include students in which you do not have a 1:1 connection with.


4. To filter for the tracking item(s) you are looking for, click the **Add Filters** button on the right side of the header bar, above your list of students.

   NOTE: if you already have filters on your list (indicated by '**Additional Filters**'), make sure you clear them by clicking the **x** button



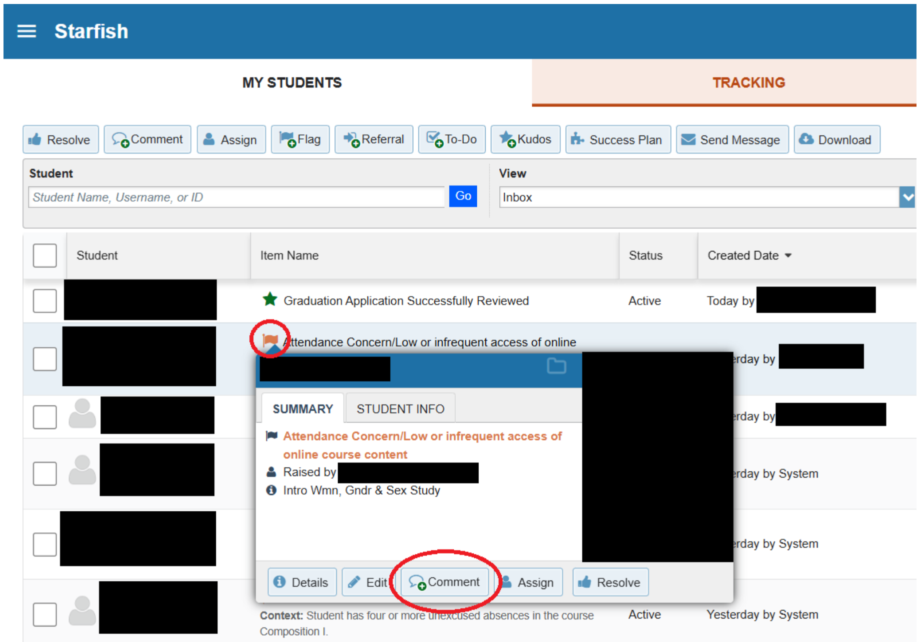
5. From the **Additional Filters** menu, make sure you are on the **Tracking Items** tab



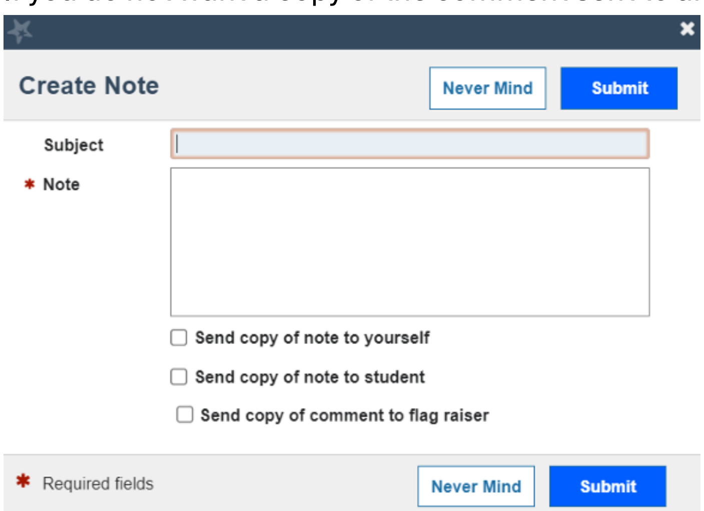

6. Select **Active** to filter for open flags
7. Under **Item Name**, select the tracking item you want to filter by. You can select multiple tracking items at a time.
   Depending on if you manage other types of tracking items, you can also narrow the search using the **Tracking Type** (flag, kudo, to-do, referral).
8. Click **Submit**

## Comments on Tracking Items

1. Log in to Starfish
2. Click on the **menu** button, then select the **Students** option
3. Click on the **Tracking** tab
4. From the **Tracking** tab, find a student in your list with a tracking item and hover your mouse over the **tracking item icon**



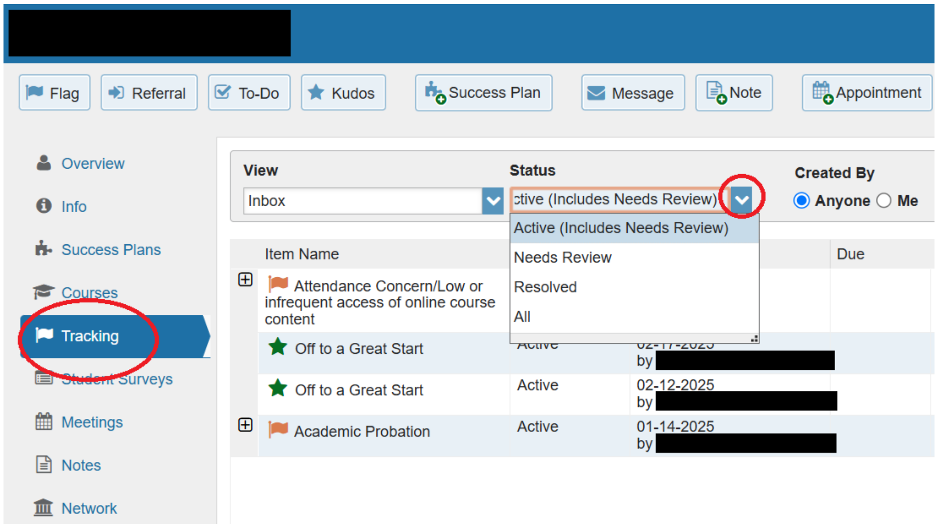

5. Click **Comment**
6. Add a **Subject** for your comment. Add a **Comment**.
   From here, you can select whether you want a copy of your comment to be sent to yourself (via email), to the student (via email), or to the flag raiser (via email).
   If you do not want a copy of the comment sent to anyone, simply do not check any of the boxes.




7. Click **Submit**

**<u>To review comments on a flag:</u>**

1. From the **Tracking** tab, find a student in your list and click on their name. This will bring you to the **Student Profile**.
2. Click the **Tracking** tab
3. To view **Active** tracking items, change the **Status** drop-down to **Active (Includes Needs Review)**



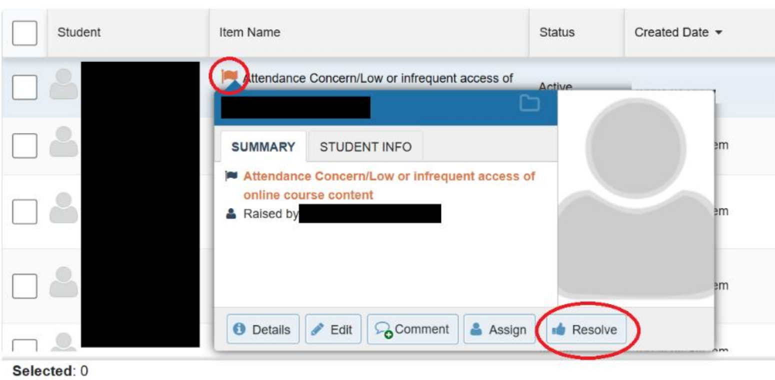

4. To view details and comments on the tracking item, click the **plus sign** ⊞ next to the tracking item to reveal the details.

## Closing Tracking Items

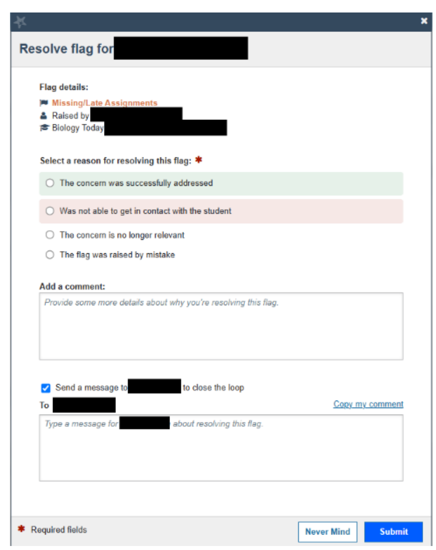
Based on the specific tracking item and your department's outreach protocol, you can close a tracking item for a variety of reasons. Typically for Flag or Referral tracking items, you will close the tracking item if you have (1) successfully connected with the student to address the concern or (2) conducted the appropriate outreach and were not able to connect.

Follow the process to clear the tracking item:

1. Log in to Starfish
2. Click on the **menu** button, then select the **Students** option
3. Click on the **Tracking** tab
4. Identify the Tracking Item you wish to close
    a. Refer to the ***Filtering OPEN Tracking Items directions***
    b. You can also find the Tracking Item directly from the **Tracking** tab
5. There are a few ways to go about closing a Tracking Item:
    a. Clear a tracking item from the **Tracking** tab page
        i. From the **Tracking** tab, hover over the **Icon** of the Tracking Item you would like to manage and a dialog box will appear
        ii. Click **Resolve**



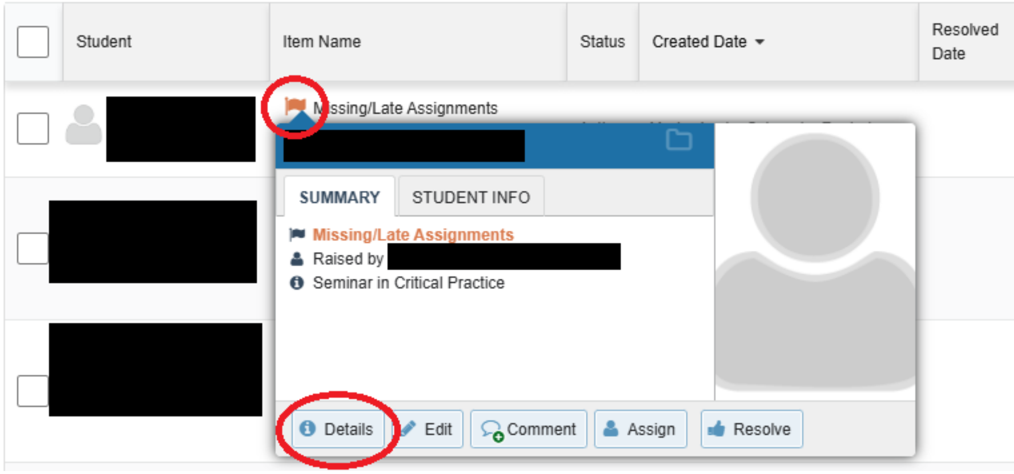

        iii. A dialog box will appear. You will be prompted to select a reason for clearing the Tracking Item and enter a comment about why you are clearing it. Depending on the Tracking Item, different closure reasons will appear.
        When clearing a flag, it is appropriate to "Close the Loop" with the individual who raised the tracking item. Closing the loop will send an email to the Tracking Item Raiser of whatever you detail in that box. You can copy your comment from the Comment box by clicking "Copy my comment" to save some time, or craft a personalized message to the Raiser.



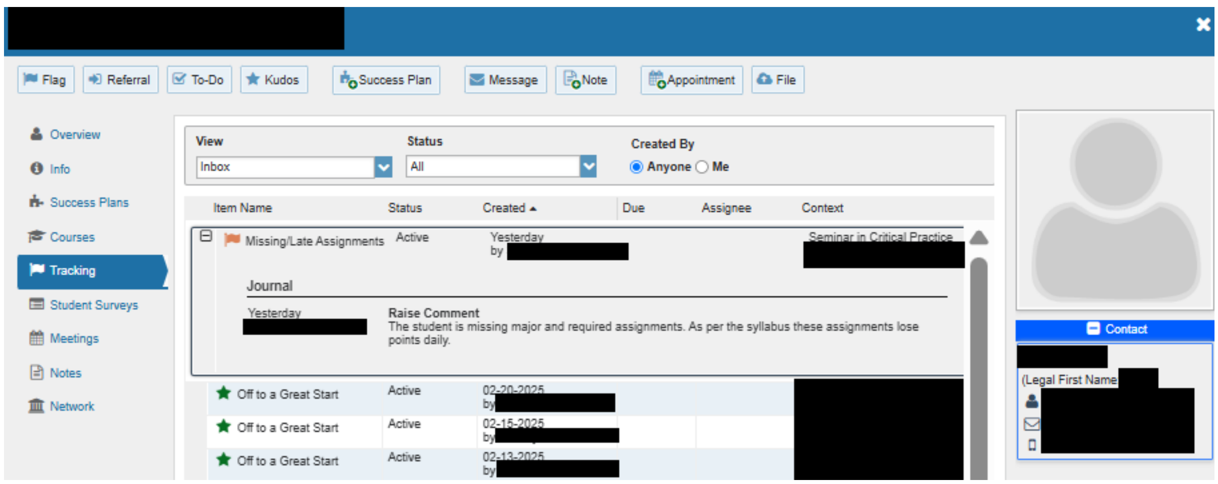

        iv. Click **Submit**

b. Clear a tracking item from the **Student Profile**

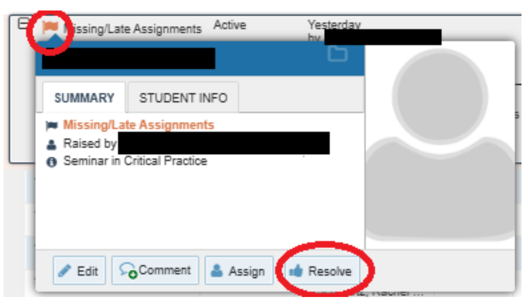
i. From the **Tracking** tab, hover over the tracking item **Icon** and select **Details**




This will take you directly to the Student Profile > Tracking > Tracking Item details. You can see all current details under the specific Tracking Item you selected.

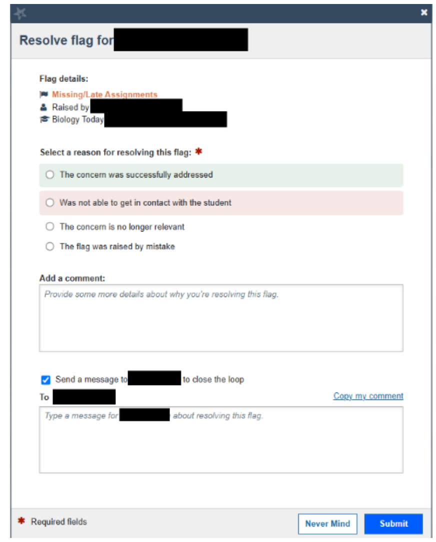



ii. Hover over the **Icon** of the Tracking Item you would like to manage and a dialog box will appear




iii. Click **Resolve**

iv. A dialog box will appear. You will be prompted to select a reason for clearing the Tracking Item and enter a comment about why you are clearing it. Depending on the Tracking Item, different closure reasons will appear.
When clearing a flag, it is appropriate to "Close the Loop" with the individual who raised the tracking item. Closing the loop will send an email to the Tracking Item Raiser of whatever you detail in that box. You can copy your comment from the Comment box by clicking "Copy my comment" to save some time, or craft a personalized message to the Raiser.




v. Click **Submit**

6. This will "resolve" the flag and it will no longer appear as an active Tracking Item for you, the student, or any other service providers who work with the student.
7. To review flags that you have cleared, simply return to the same screen and sort for "Active and Resolved" items in the View sorting bar