Student Plan Guide

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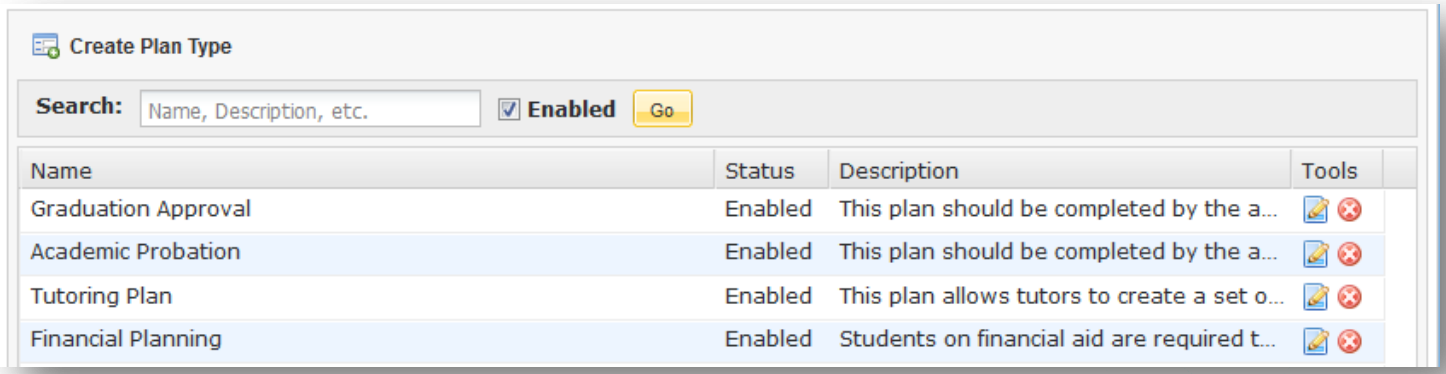
Walk Through Instructions:

To Configure Plan Types:

Navigate to the Admin Panel of Starfish and select Feature Configuration > Plan Types.

Plan Types you have created are viewable and searchable by Name. They may also be filtered according to whether the Plan Type is Enabled.



Select the "Create Plan Type" icon at the top to create a new plan.

Name, Instructions, and Description:

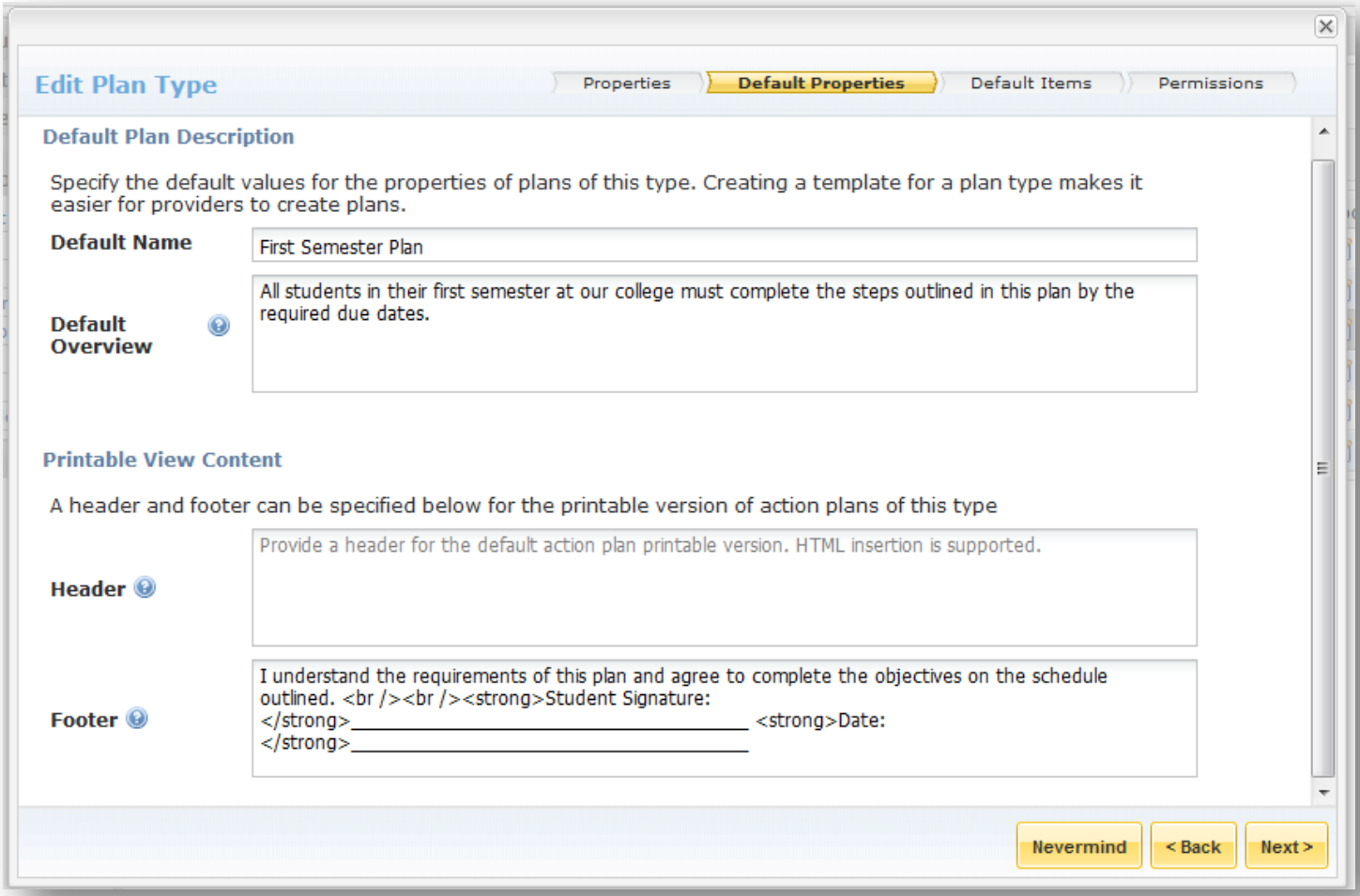
To create the Plan Type, you must provide a Name. A description is optional and only visible to Starfish Admins. The name should be descriptive of the plan itself (Ex: First Semester Plan).

Plan Types Are Enabled by Default:

When creating the plan, the "Enabled" box is checked by default. If you are unsure about whether you want users to utilize the plan yet, you may uncheck this box. Click Next.

Default Properties:

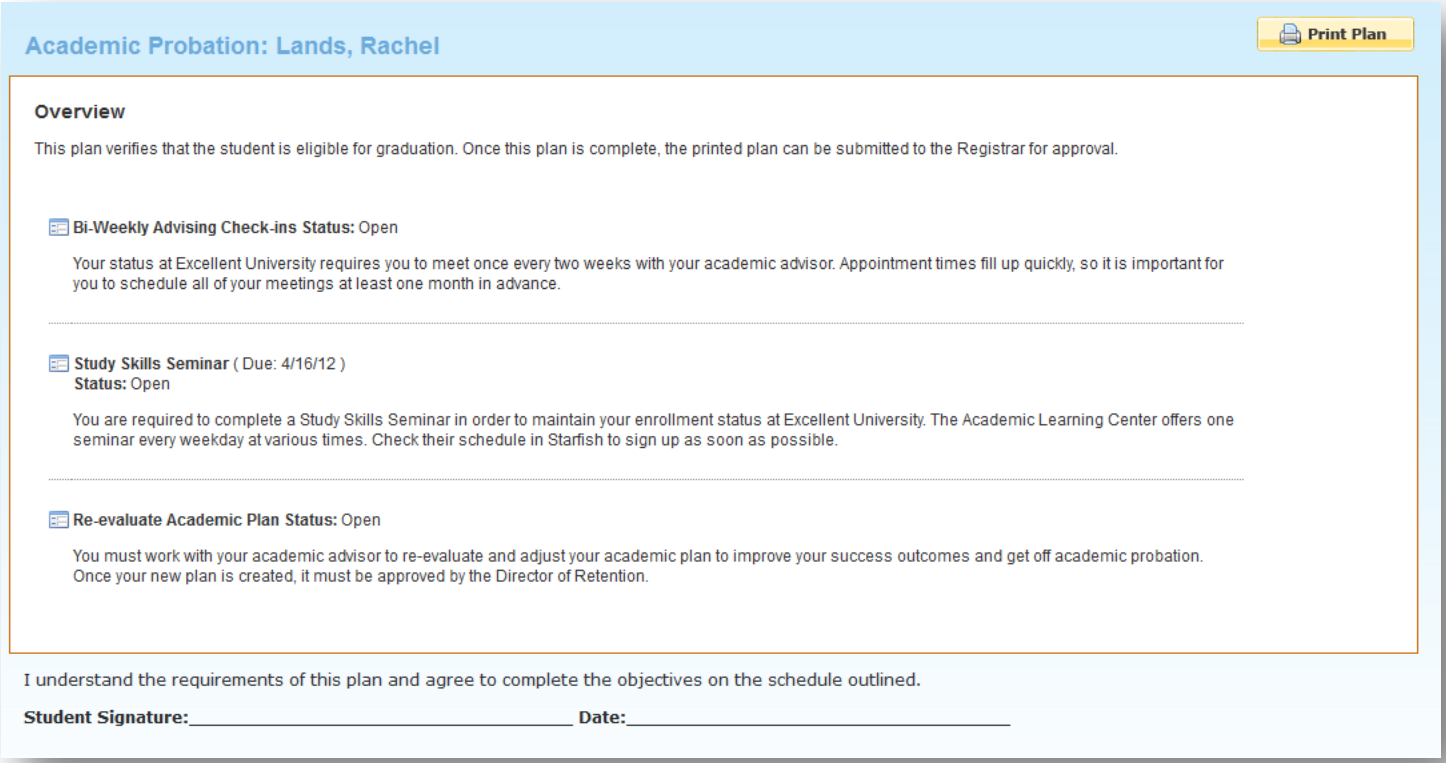
Enter a name and overview for your Plan Type. These are visible to the support providers (i.e., Advisors) creating plans.



Printable View Content:

You can specify a custom header and/or footer to the printable version of the plan. These fields support basic HTML markup. An example is below. Click Next.

Printable Version Example:



Academic Probation: Lands, Rachel

Print Plan

Overview

This plan verifies that the student is eligible for graduation. Once this plan is complete, the printed plan can be submitted to the Registrar for approval.

Bi-Weekly Advising Check-ins Status: Open

Your status at Excellent University requires you to meet once every two weeks with your academic advisor. Appointment times fill up quickly, so it is important for you to schedule all of your meetings at least one month in advance.

Study Skills Seminar (Due: 4/16/12)
Status: Open

You are required to complete a Study Skills Seminar in order to maintain your enrollment status at Excellent University. The Academic Learning Center offers one seminar every weekday at various times. Check their schedule in Starfish to sign up as soon as possible.

Re-evaluate Academic Plan Status: Open

You must work with your academic advisor to re-evaluate and adjust your academic plan to improve your success outcomes and get off academic probation. Once your new plan is created, it must be approved by the Director of Retention.

I understand the requirements of this plan and agree to complete the objectives on the schedule outlined.

Student Signature:_____ **Date:**_____

Default Items:

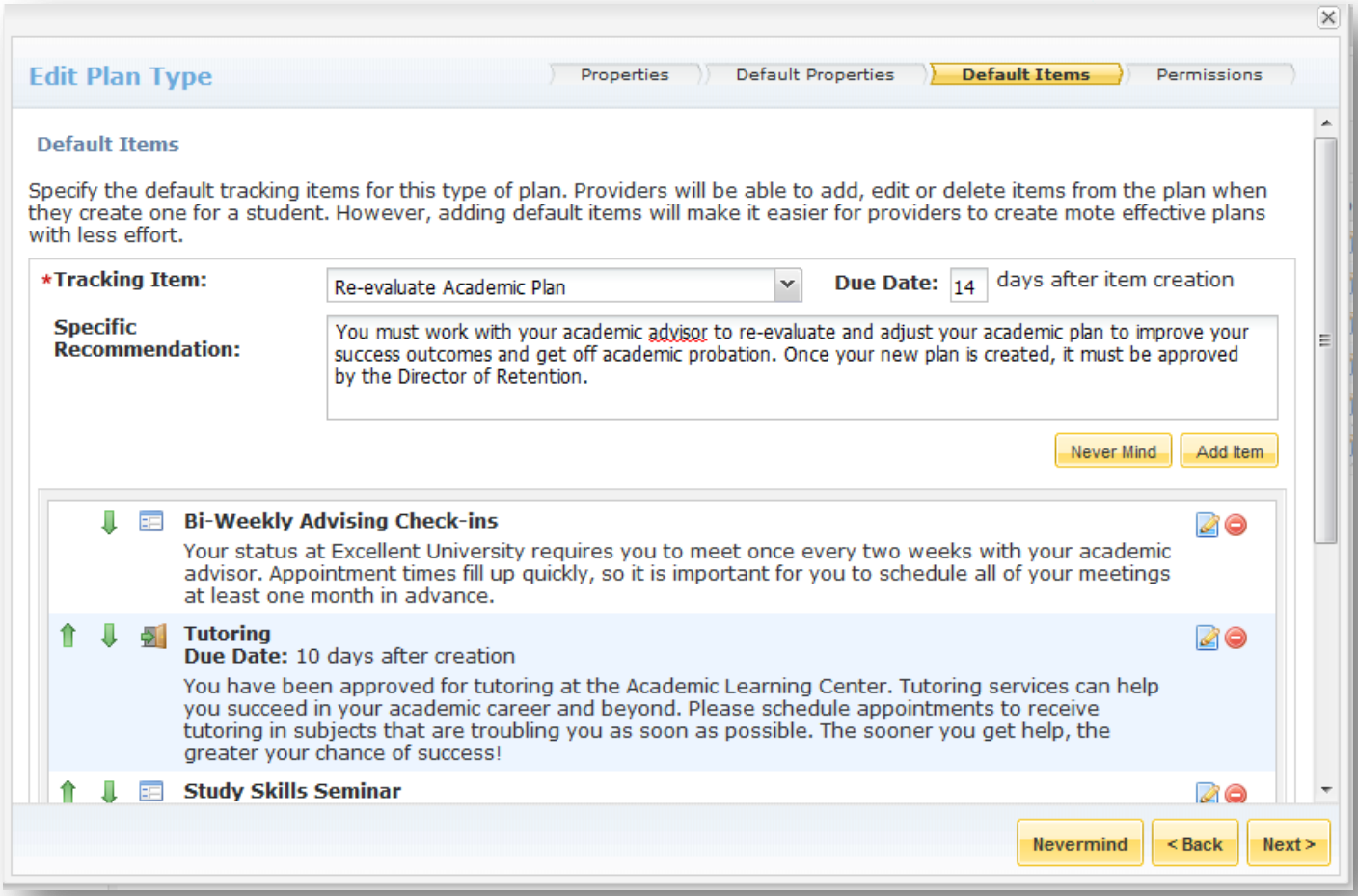
Now you must specify the tracking items that will be part of this Plan Type by default. Select a tracking item by opening the drop-down menu for Tracking Item.

>> Help! I don't see any Tracking Items!
Your tracking items must be created before adding them to a Plan Type. To do so, click Finish on the Plan Type wizard and return to Feature Configuration > Tracking Rules. Add and configure your necessary To-Do and Referral Items. Then return to the Plan Type wizard to continue.

Adding Tracking Items:

To add a Tracking Item to the Plan Type, you may select from the drop down menu of available tracking items in your system. When you select a Tracking Item from the menu, the name of that Tracking Item will display in the Tracking Item box. You may optionally select a relative due date for this item (ex: 10 days after item creation). You may also enter a pre-populated description into the "Specific Recommendation" field. Click "Add Item" to include the Tracking Item in the Plan Type.

As you add Tracking Items to the plan, the box below will display the name of the Tracking Item and the Specific Recommendation Text. The green arrows on the left can be clicked to arrange the order in which Tracking Items should appear on the plan. The Tools section on the right allows you to change the Specific Recommendation Text by clicking the pencil and paper icon. You can remove a Tracking Item from the Progress Survey by clicking the red circle to delete it. Click Next.



Permissions:

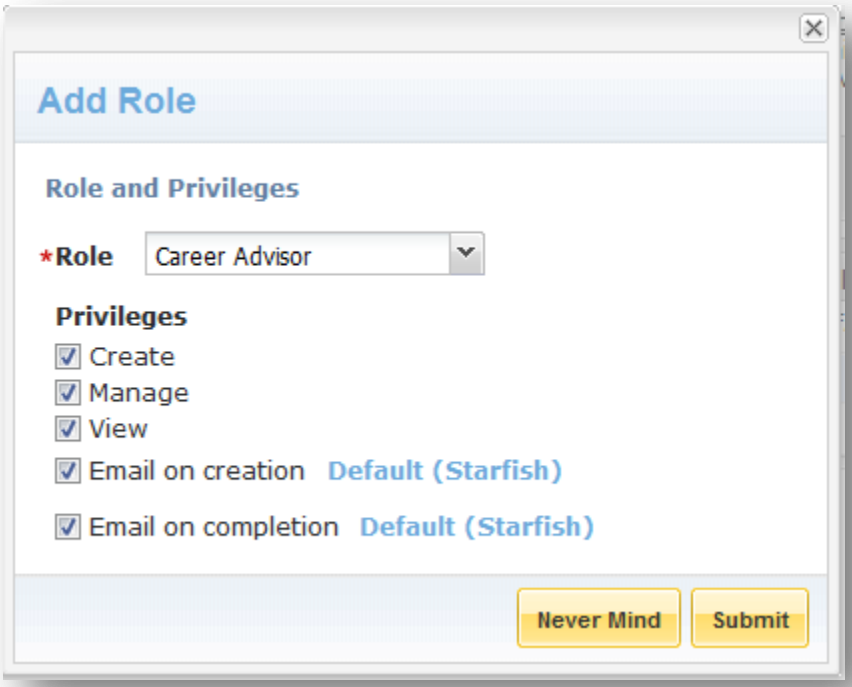
Similar to a tracking item, you can set the permissions for the Plan Type, based on role. Click Add Role to begin. From the Role drop-down menu, select the first role that should have permissions for this Plan Type.

***Please note*: The permissions for a Plan Type override the permissions for the individual tracking items within the plan. For example, if a Tutoring Referral is added to a Plan Type and the role of Advisor has Manage permissions for that Plan Type, the student's Advisor can manage that referral regardless of the permissions on the individual tracking item.**

Check off the boxes to give one or more of the following permissions:

- **Create** – Users with the selected role can create this Plan Type for a student.
- **Manage** – Users with the selected role can edit, view, print, and delete. Users can also resolve the tracking items within the plan.
- **View** – Users with the selected role can view a printable version of the plan.
- **Email on creation** – Users with the selected role will receive a Provider Creation Email when the plan is created.
- **Email on completion** – Users with the selected role will receive a Provider Completion Email when all tracking items within the plan are resolved.

Then click Submit. Repeat these steps to add additional roles. Example emails are below.



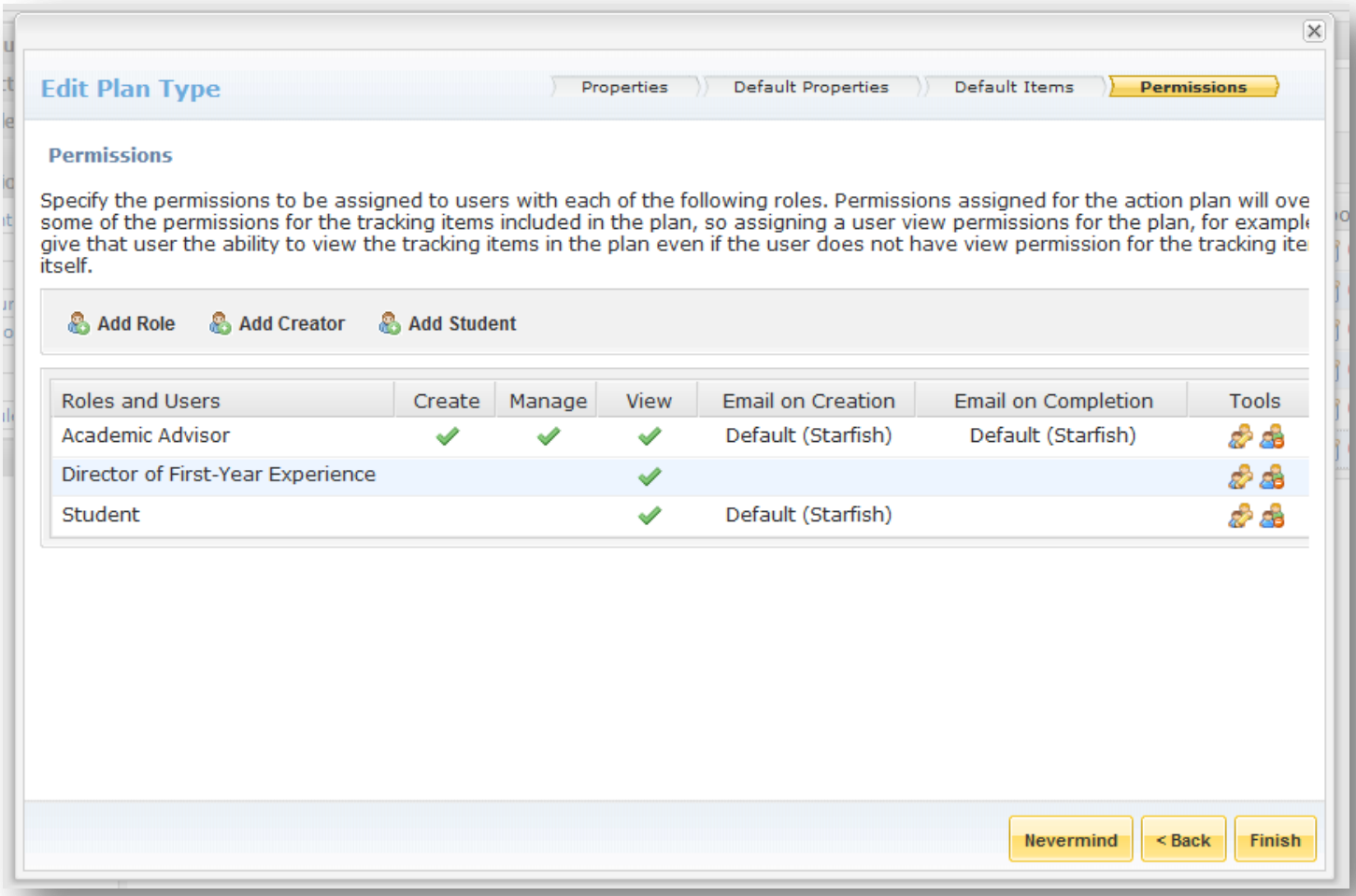
Student Permissions:

Note that the Student can only be given the following permissions: View, Email on creation, and/or Email on completion.

Recommendation: If you add "Email on creation" for the student, consider not enabling Email notifications for each individual tracking item within the plan or the student will receive a high volume of email when the plan is created.

Finish the Plan Type:

When you are done adding roles to the Permissions page, click Finish to create the Plan Type.



Example Plan Types:

Below are example Plan Types from other Starfish institutions. Please consult your Implementation Manager if you have any questions.

Example 1 – First Semester Plan
Tracking Items:

- Complete the New Student Readiness Survey
- Meet with your Advisor during Welcome Week
- Setup your Starfish Profile
- Sign Master Promissory Note

Example 2 – Academic Recovery Plan
Tracking Items:

- Visit the tutoring center
- Schedule regular meetings with your advisor
- Attend mandatory study skills workshop
- Contact your instructor(s) if you have concerns about your courses

Example 3 – Graduation Plan
Tracking Items:

- Meet with your Advisor to verify credits completed
- Apply for Graduation
- Schedule appointment with career center to review resume
- Buy cap and gown

Additional Tips and Considerations:

1. ***Email Permissions***: If you configure individual tracking items to email several roles and a Plan Type to also email those roles, many emails will be sent upon plan creation/completion.
    1. **Recommendation**: For tracking items that will only be used within plans, only give email permissions for the Plan Type and not the individual tracking items.
2. ***Workflows***: Consider creating plans to develop stronger workflows for resolving flags and developing early alert processes on campus.
    1. **Example**: If you have flags to identify students at risk upon admission, consider assigning a plan designed to help these students be successful from the start.
3. ***Completion***: Make sure you have identified and properly trained the individuals on campus who will be responsible for resolving tracking items and monitoring plans to completion.
    1. **Remember:** When plans are made visible to students it is important to resolve tracking items in a timely manner so a student views an accurate list of open items. Old tracking items that are not resolved might discourage students who are working hard to complete their plans.

Default Plan Type Emails:

1. **Provider Creation Email**
2. **Student Creation Email**
3. **Completion Email**

Provider Creation Email

Dear {Recipient Name},

The following plan has been created for these students:

{List of students with student name and student email displayed for each student}

Plan: {Plan Name}
Overview: {Overview Text}
Items:
{Item 1 Name} (Due: {dueDate})
{Item 1 Comment}
{Item 2 Name} (Due: {dueDate})
{Item 2 Comment}
Etc…

Thank you for your help with these plans. We appreciate your dedication to student success.

Student Creation Email

Dear {Recipient Name},

The following plan has been created for you by {Plan Creator Name}.

Plan: {Plan Name}
Overview: {Overview Text}
Items:
{Item 1 Name} (Due: {dueDate})
{Item 1 Comment}
{Item 2 Name} (Due: {dueDate})
{Item 2 Comment}
Etc…

Completion Email

Dear {Recipient Name},

Congratulations! The following plan is now complete:

Plan: {Plan Name}
Overview: {Overview Text}

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