Tracking Item Configuration Guide

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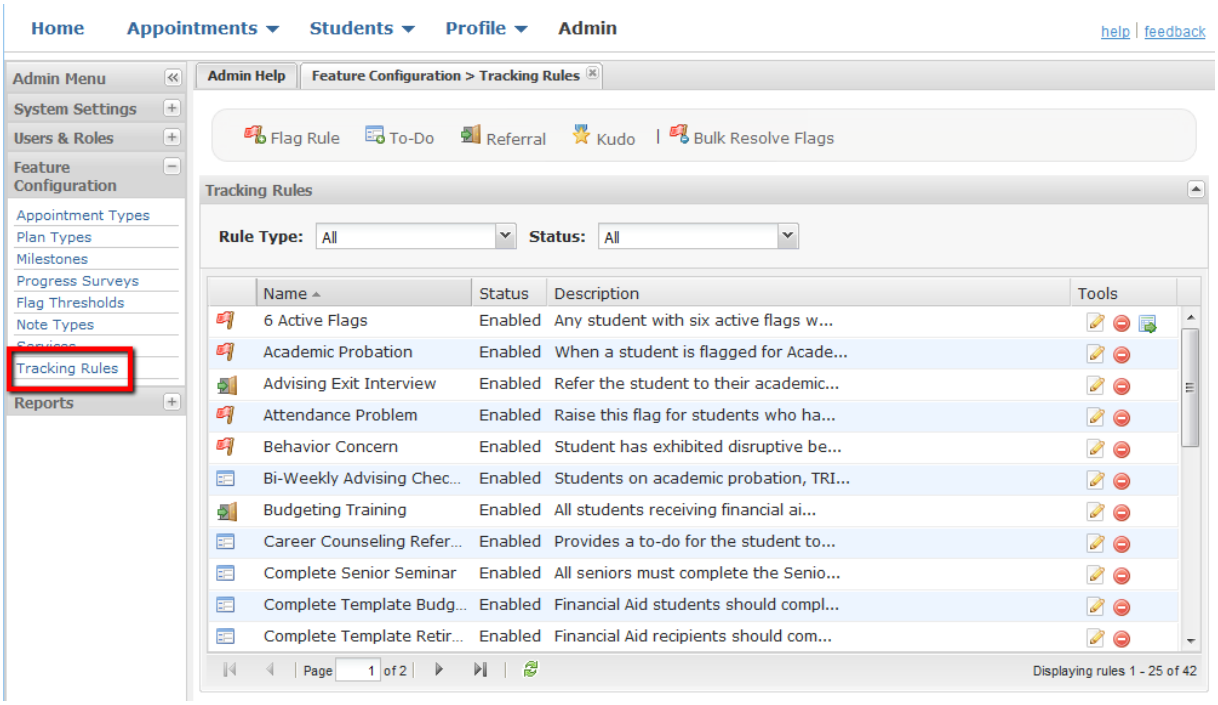
Walkthrough Instructions:

Accessing Tracking Rules in Starfish Admin:

Navigate to the Admin Panel of Starfish and select Feature Configuration > Tracking Rules.



Tracking Rules that you have created are visible in alphabetical order. You can sort your current Tracking Rules by Type (Flag, Kudo, Referral, or To-Do) or by Status (All, Enabled, Disabled).

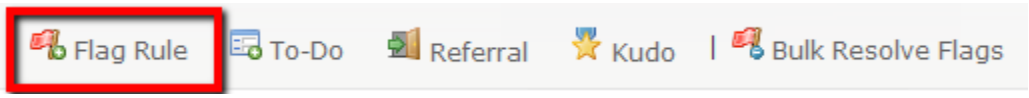
You can edit existing Tracking Rules in this menu by clicking on the Edit icon (pencil and paper) and making the desired changes.

Tracking Items may be deleted by clicking on the Delete icon (red circle). Deleting a Tracking Rule will also hide any item created by the rule and remove those items from reports.

System-Raised Flags may be previewed by clicking on the Preview icon (blue page with green arrow). Please note that the preview will show only those flags which would raise at that moment. For Enabled flags, this preview is typically blank because the flags would have been raised by the system as soon as the most recent import was processed (usually over night), and therefore no additional flags will be triggered by the System Flag Rule until at least the next scheduled data import.

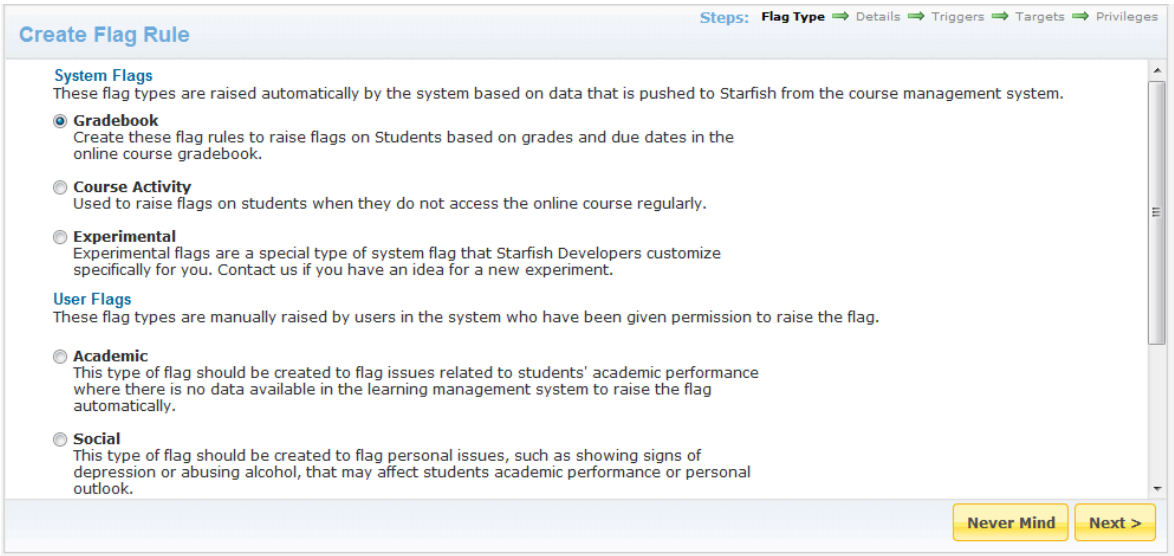
To create a new Tracking Rule, click on the "Flag Rule" or "Kudo" button for Early Alert, or the "To-Do" or "Referral" button for Connect. If any of these buttons are not displayed in the Tracking Rules area, contact your Implementation Manager.

Flag Configuration (Early Alert):



Flag Type:

Before you can create a flag rule, you must indicate the type of flag you wish to create. Indicating the type ensures that the correct options are available for configuration and will allow you to categorize your flag rules effectively.

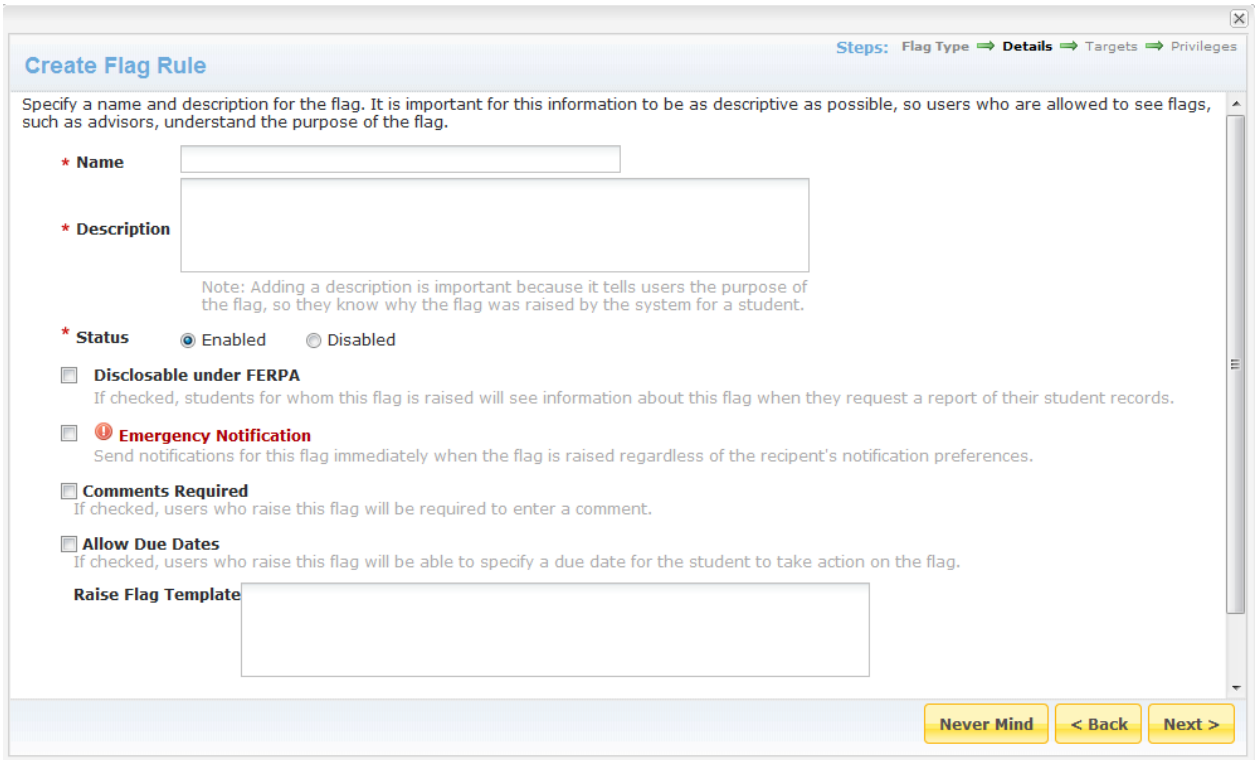


System Flags are raised by the system using data from the Gradebook, from Course Activity, or an Experimental Flag. Please contact your Implementation Manager to consult about Experimental Flags before attempting to configure and use them. System and Experimental flags cannot be included on Progress Surveys.

User Flags are manually raised by users in the system. Categorizing the flag rule during configuration allows users to filter their view of flags and allows for Tracking Item Reports to be more easily sorted.

Name Your Flag:

Once you have determined your flag type, you must provide a Name, Description, and Status. The Name should be descriptive enough for flag raisers to easily identify the associated concern (Ex: Attendance Concern). The Description should provide additional details about when and how to raise the flag (Ex: Raise this flag when a student's absences have reached the maximum allowed for the course). The Status is "Enabled" by default; changing the status to "Disabled" will prevent users from raising the flag at any time in the system or on a Progress Survey.



Disclosable Under FERPA:

If you determine that the Tracking Rule is disclosable according to FERPA law (i.e., should be considered part of the student's academic record), you should mark this check box. This will mark the flag as such to anyone who would raise it outside of a survey.

Emergency Notification (Flag Rules Only):

Tracking Rules that require immediate response by faculty or staff should be marked as Emergency Notification Flags and will disregard the Email Notification Settings of the users who would be notified of the raised flags, allowing for immediate intervention with the student. Please note: In true emergency situations, your users should be trained to pick up the phone and alert the proper authorities, not rely on Starfish.

Comments Required (Does Not Apply to System Flags):

Some Tracking Items, when raised, should always include additional details that allow for a more thorough response to the Tracking Item, such as details about a Behavior Concern or the particular specific content for a Tutoring Referral. When this is the case, you should select Comments Required when configuring the Tracking Rule.

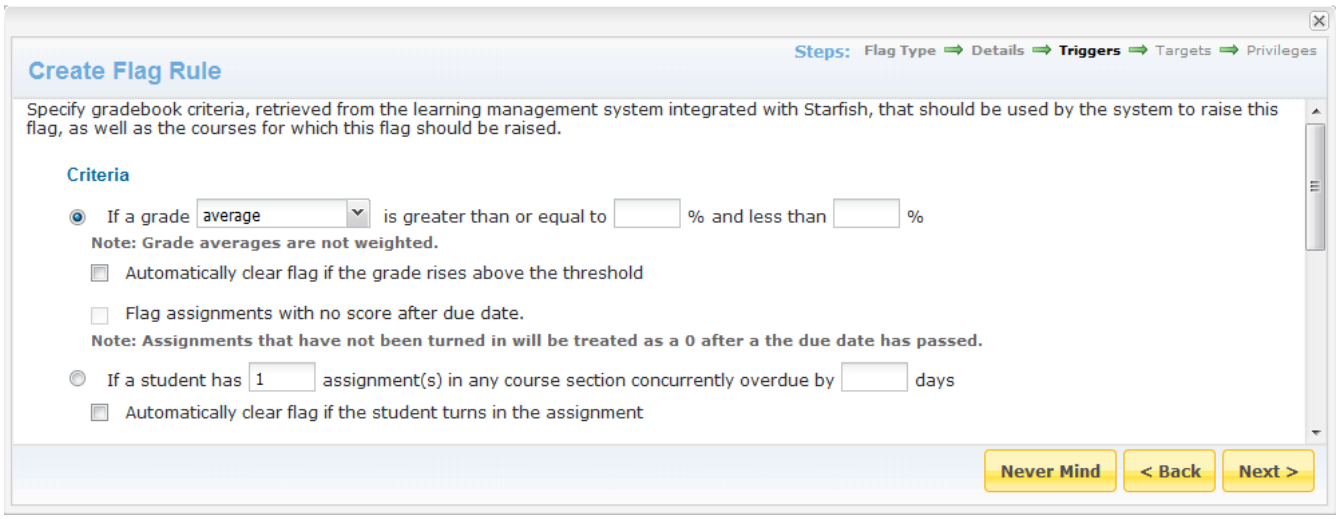
Allow Due Dates (Does Not Apply to System Flags):

Due Dates can be applied to a Tracking Rule so that those who raise the Tracking Item can associate a Due Date by which an action or response should be completed. This is commonly used with To-Do items and Referrals.

Raise Flag Template/ Default Creation Comment (Does Not Apply to System Flags):

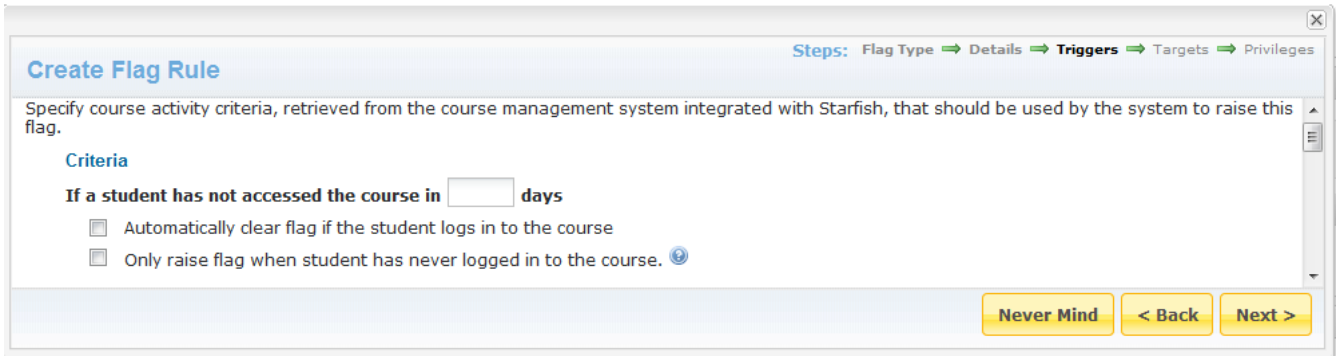
Consider entering a Raise Flag Template/Default Creation Comment for any Tracking Items that allow students to "View" them. This ensures that Students will either view some helpful additional information that has been established during configuration or customized by the Tracking Item Raiser.

Gradebook Criteria (Gradebook Flags Only):



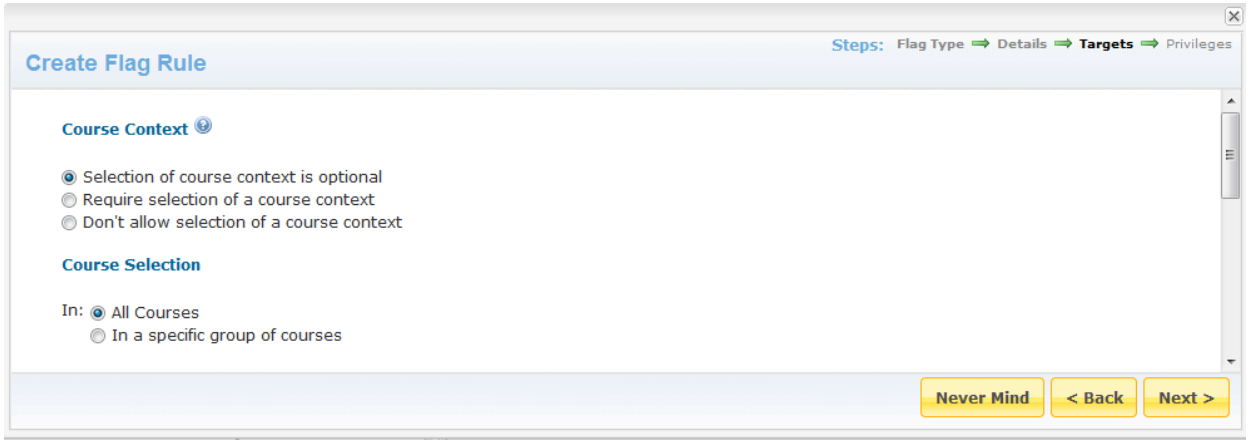
This defines the conditions under which the flag should raise. Flags can be set to raise based on a course average or a grade on an assignment. The Criteria also allows for behavior such as automatically resolving a flag once the student's grade rises above the threshold, or flagging based on overdue assignments.

Course Activity Criteria (Course Activity Flags Only):



To create this Flag Rule, specify how many days should pass before a student is flagged for not accessing the course. You may also indicated if the flag should clear once the student accesses the course again, and whether the flag should only raise if the student has never accessed the course.

Course Context (Does Not Apply to System Flags):

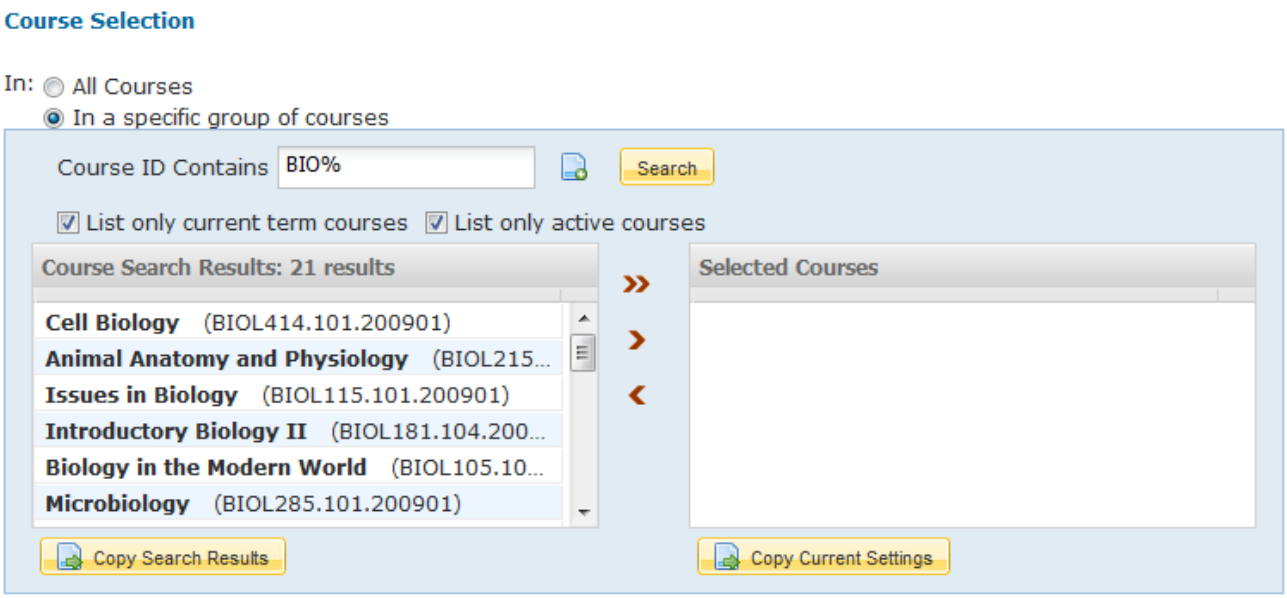


Selection of a course context is optional (Default): A Tracking Rule must at least allow for a Course Context in order to be included on a Progress Survey. You should choose this option if the Tracking Item can be associated with a course but might be raised by users, such as advisors, whose relationship to the student is not course-based, as it might be with an Instructor or TA.

Require selection of a course context: Requiring a course context ensures that a Tracking Item will always be directly associated with a course, but limits the Tracking Item to only be raised by those with a course-based relationship, such as an Instructor or TA. This is common for flags in which the course context is crucial to know in order to follow up with the student, such as Poor Attendance.

Don't allow selection of a course context: This option is reserved for situations where a Tracking Item should not be associated with a course, such as a Health Concern flag. This option prevents the Tracking Item from being added to a Progress Survey.

Course Selection (Flag Rules Only):



All courses: Selecting this makes the Tracking Item available to be raised for students in all active courses in Starfish.

In a specific group of courses: Selecting this opens a course search interface that allows you to search for, and select, specific courses for which the Tracking Item can be raised.

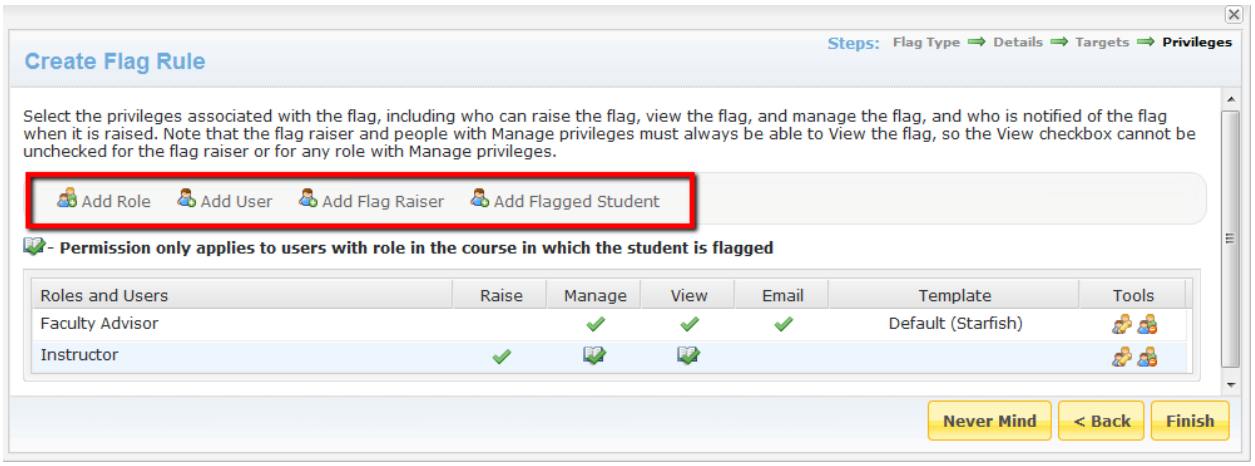
You can search for an exact course section, use a Wildcard (such as * or %) to search for part of a course name (Ex: BIO%), or copy a course list from another program, such as Excel, by clicking the Bulk Search Criteria icon (paper and plus sign) and pasting the list into the pop-up window so that each course section is listed on a separate line. “List only current term courses” allows you to search for and display only courses that exist within the active term. “List only active courses” allows you to search for and display only courses that are active (e.g., available in your LMS/SIS).

Once you have identified the courses you wish to select for the Tracking Rule, you can us the single arrow (>) to move courses into the Selected Courses box one at a time, or use the double arrow (>>) to move the entire list from the Course Search Results to the Selected Courses box.

Since you are targeting the Tracking Rule at the course section level, these sections must be updated each term in order for the flag to continue to operate correctly.

Tracking Rule Permissions:

Roles must have permissions for a Tracking Rule in order to raise, view, manage, or receive notifications of that Tracking Item. Please note that a current relationship must also exist between that role and a student in order for such permissions to be active.



Add Role: Adding a Role allows all users currently assigned that Role to possess the specified privileges for the Tracking Rule with regard to any students who have relationship to them via that Role.
For Example: Adding the Advisor Role to a Tracking Rule provides Advisors the specified Tracking Rule Privileges to their Advisees.

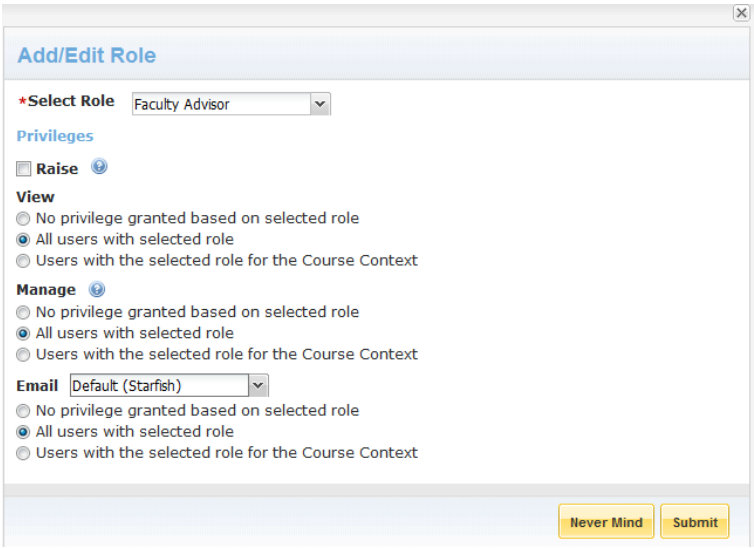
Add User: Adding a User allows that user to possess the specified privileges for the Tracking Rule with regard to any students with whom that user has a relationship in Starfish.
For Example: This might be used in a circumstance where only a specific Advisor, rather than all users with the Advisor Role, should have the specified privileges for a Tracking Rule. Note that this user still needs to be assigned relationships to students in order to have these privileges.

Add Flag Raiser/ Add Creator: Adding the Flag Raiser or Creator can limit certain privileges to the Tracking Item Raiser that should not be available to others with the same Role.

For Example: If some courses have multiple Instructors, then the Instructor Role may only have the privilege to Raise a Tracking Item, but additional privileges might be given to the Flag Raiser or Creator, so that the additional course Instructors do not have access to View, Manage, or receive Email Notifications.

Add Flagged Student/ Add Student: Adding the student to a Tracking Role allows the student to be made aware of the Tracking Item in some way. This Permission is special because students may only have the View and Email privileges. View allows students to view the Tracking Items within Starfish, as well as any Comments made when the Tracking Item was raised. Email allows the student to receive an Email Notification when the Tracking Item is raised.

Tracking Rule Privileges:



Raise (User Flags Only): This allows users with the specified Role to create the Tracking Item for a student with whom they have a relationship. This privilege is assigned by marking a check box at the top of the Add/Edit Role window.

View: This allows users with the specified Role to View the Tracking Item for a student with whom they have a relationship, as well as any comments on the item.

Manage: This allows users with the specified Role to Manage the Tracking Item for a student with whom they have a relationship. Manage privileges allow users to make additional comments on Tracking Items and to Resolve Tracking Items.

Email: This allows users with the specified Role to receive Email Notifications of Tracking Items for students with whom they have a relationship.

An **Email Template** must be specified. For Faculty and Staff Roles, we recommend using the Starfish (Default) Template. For Students, we recommend customizing your email messages to ensure the most effective communication with students. See Linking Email Templates to Tracking Items below for details.

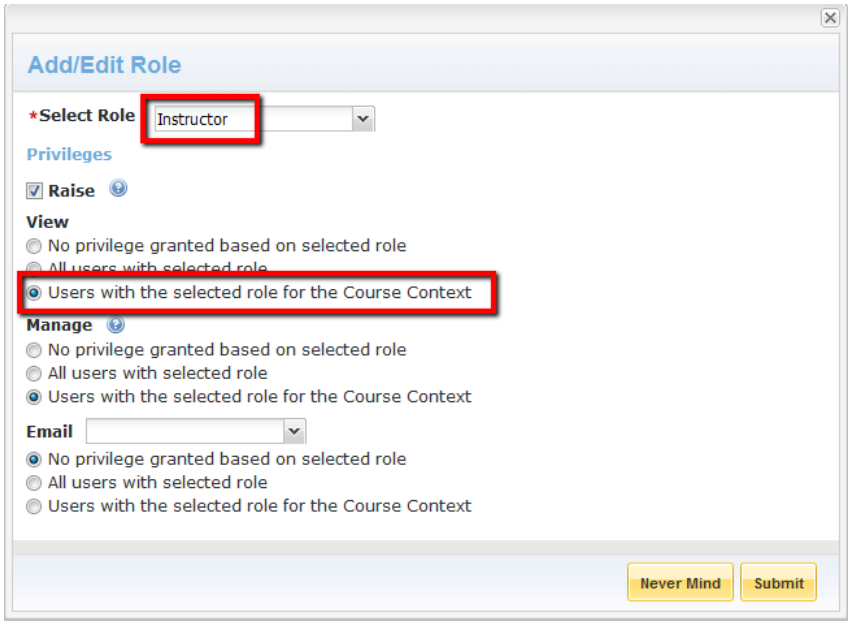
When adding the View, Manage, and Email privileges for a Role, you will be asked to grant one of three options to provide the correct level of access to the Tracking Item.

No Privileges granted based on selected role: This is default selection and prevents the Role from having a certain privilege to the Tracking Item.

For Example: If you do not wish for the Role to receive Email Notifications of a Tracking Item, you should select this option.

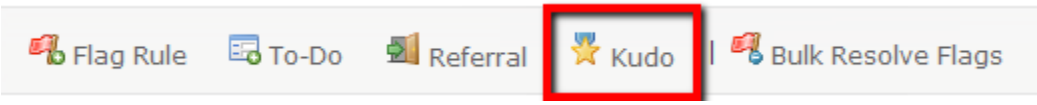
All users with the selected role: This selection allows all users with the assigned Role and a relationship to the student to see any of these Tracking Items raised on the student, across all courses.
For Example: Advisors and others whose relationship is NOT course-based should be assigned privileges in this manner so that they can see the Tracking Items regardless of course context.

Users with the selected role for the Course Context: This selection allows users with the assigned Role and a course-based relationship to the student to see the Tracking Item if it is raised for the course for which the relationship exists.



For Example: Instructors should be assigned privileges using this selection so that they can have privileges to Tracking Items for their students in their course ONLY, but they will not have privileges to those Tracking Items for their students if the Tracking Item was raised for courses in which they are not Instructors.

Kudo Configuration (Early Alert):

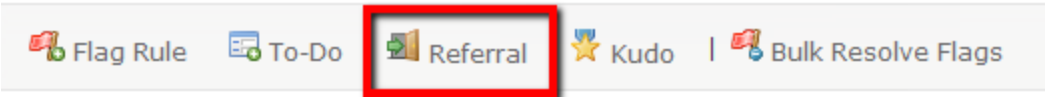


To create a Kudo, you would follow the same instructions outlined for a flag, but with a few key differences:

Course Selection: Not Available for Kudos. Enabled Kudos are available to all courses within Starfish at this time.

Recommendations: Starfish recommends making all Kudos "Viewable" to the student in order to provide positive reinforcement for their hard work and achievements. Allowing the student to receive an email for a kudo is also recommended.

Referral Configuration (Connect):



To create a Referral, you would follow the same instructions outlined for a flag, but with a few key differences:

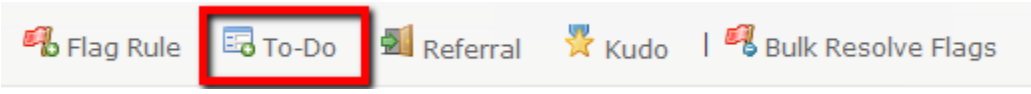
Course Selection: Not Available for Referrals. Enabled Referrals are available to all courses within Starfish at this time.

*Referrals may commonly be associated with Student Action Plans. Consider whether a Referral is likely to be raised always on a Student Plan, never on a Student Plan, or both, and use that information when configuring View and Email Privileges. See the Guide to Student Plans on the Wiki for more information.

*Appointment Types can be associated with Referrals to restrict which students can sign up for certain appointments. This would typically be used for appointments made via a Service Calendar. Check out the Tenant Admin Area of the Wiki and click on Calendar Management>> "How do I setup a calendar for a tutoring or advising center?" for more information on using Referrals to restrict appointments.

Recommendations: Use Referrals as both reactive and proactive measures on campus. If a student displays the need for a campus resource, consider asking users to raise Referrals proactively to impact the student before they are flagged for a concern. If a student has already been flagged, and a Referral to a campus resource is the logical next step, consider creating a workflow in which the flag manager Resolves the flag and raises a Referral to provide an Action Item for the student to follow-up on.

To-Do Configuration (Connect):



To create a To-Do, you would follow the same instructions outlined for a flag, but with a few key differences:

Course Selection: Not Available for To-Dos. Enabled To-Dos are available to all courses within Starfish at this time.

*To-Do's may commonly be associated with Student Action Plans. Consider whether a To-Do is likely to be raised always on a Student Plan, never on a Student Plan, or both, and use that information when configuring View and Email Privileges. See the Guide to Student Plans on the Wiki for more information.

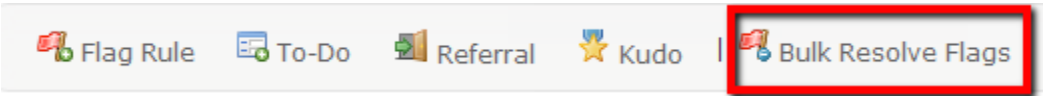
Recommendations: To-Do's may be used outside of Student Plans and are a helpful way to assign pro-active tasks to students that will improve the students' chances of success. Consider creating To-Do's for the activities on campus that you would like students to be more proactive about, such as visiting the Career Center or seeking an internship.

Bulk Resolving Flags:

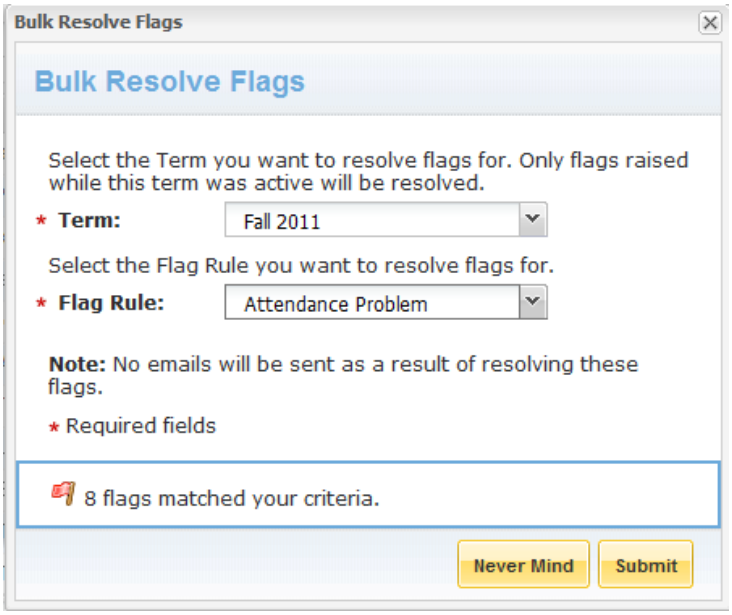
Many Flags become irrelevant after a term has ended and should be resolved in order to ensure your system is effective (e.g., Late/Missing Assignments). Allowing irrelevant Flags to remain active can clutter up users' Tracking views and make priority issues difficult to identify.

Also, the experimental aggregate flag rules (Three Active Flags and Six Active Flags) are triggered based on active flags across terms. If your institution is using either of these experimental rules, they could be falsely triggered

by flags from a previous term if those flags have not been resolved. Flags resolved in bulk will be indicated as such on any reports that you run.



To Bulk Resolve Flags, simply click on the button and choose the flag and the term for which you would like to resolve any active flags. A blue box will display at the bottom indicating how many flags would be resolved. If you are satisfied with the choice, click Submit to resolve the flags.



Linking Email Templates to Tracking Items:

For Faculty and Staff, the Email Notification template commonly used is the Starfish (Default) template. However, in order to send customized email messages to students, you must first provide custom email templates to your Implementation Manager to load them into Starfish. For assistance creating custom email templates, please refer to the Email Template Guide and the list of Example Email Templates to Flagged Students, both available on the Wiki. Please allow at least one week for your Implementation Manager to load the custom templates into Starfish for you.

Once your custom Email Templates have been loaded into Starfish, you must link the appropriate Email Templates to the appropriate Tracking Items by following the steps below:

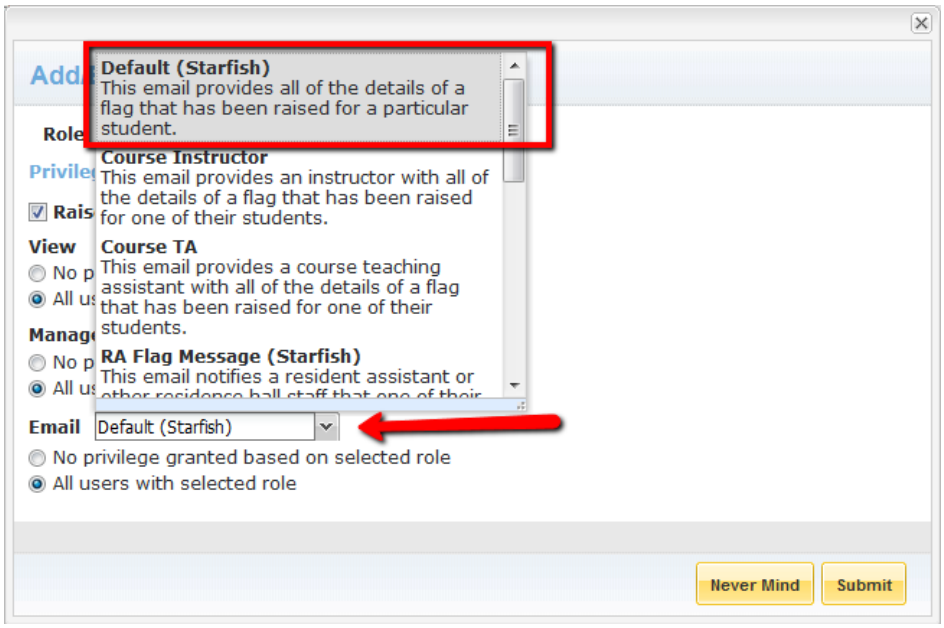
1. Go to Starfish Admin > Feature Configuration > Tracking Rules.

2. Find a Tracking Item (Flag, Kudo, To-Do, or Referral) and click the Edit icon (pencil and paper) to open the wizard.

3. Go to the last page of the wizard where role permissions are assigned.

4. Either choose to modify the permissions for an existing role, or click one of the icons towards the top to add a new role. Please review the Tracking Rule Permissions and Tracking Rule Privileges sections of this document for assistance assigning permissions.

5. After you check the box to assign Email permissions you must select the Email Template from the drop down menu. All of your institution's available custom email templates will be listed with brief descriptions.



6. For Instructors and Staff Roles, choose the Starfish (Default) template.

7. For the Flagged Students, select the customized template that your institution developed for that Tracking Item.

8. Click Submit. Repeat steps 2-7 to add or edit any other roles that should have permissions for this Tracking Item.

9. Click Finish on the wizard to save the Tracking Rule.

10. Repeat these steps for each Email Template / Tracking Rule.

Additional Tips and Considerations:

1. Develop a Workflow for each Tracking Item. Consider who is responsible to managing a tracking item, at what time a Tracking Item should be resolved, and how its raising and management affect the big picture of student success and retention at your institution.
2. When developing a Tracking Item Workflow, you may wish to "rank" Tracking Items to prioritize which issues should receive the most immediate attention, if any, from faculty and staff. Some institutions do this with flag naming conventions.
3. To reduce the number of Tracking Items that must be maintained by Starfish Administrators or sorted through by Starfish Users, consider making broadly applicable Tracking Items and training users who raise Tracking Items to provide detailed and useful comments.
4. Bulk Resolve Tracking Items each term if the information they provide is no longer relevant. For instance, an Attendance Flags does not need to be actively managed once a term is over and can easily be resolved using this feature.

5. Leave System Flag Rules "Disabled" for easy use of the Preview feature until you can test the flag for a few specific courses and feel satisfied that it is triggering as desired.
6. Do not send Email Notifications to every role. Consider which roles need to be notified of specific Tracking Items and simply make the Tracking Items "Viewable" to others who should be aware of the information when actively working with a student. Sending Email Notifications about every item to every role prevents users from easily identifying which issues are of most importance to them for their students.

Troubleshooting:

What if…

1. When attempting to Preview a System Flag Rule, I see no results, even though I expected to see a number of flags that would raise:
    a. Enabled vs. Disabled: If the flag has been enabled for some time, it is likely that all flags that would be triggered by you most recent data import have already raised.
    b. Recent Imports: Check your Import Status under System Settings to verify that Starfish is receiving regularly scheduled imports from your LMS. Even if Starfish is receiving regular imports, consider whether any of the System Flag's Criteria has been met recently enough to Raise a new flag.
    c. Flag Threshold: Is it possible that so many students would be flagged by the System Flag Rule that the Flag Threshold is preventing the flag from raising? If the percentage of students that meet the criteria for the Flag Rule is greater than this Threshold number, the flag will be prevented from raising, even in the Preview. To check the Flag Threshold, go to Starfish Admin > Feature Configuration > Flag Threshold.
    d. Contact Starfish Technical Support for additional assistance.
2. Advisors aren't receiving Email Notifications of Tracking Items, even though I added the Advisor Role to the Tracking Item and assigned that role the Email Notification Privilege:
    a. Does the Advisor have current relationships for the term? Run a Relationship Report to verify their relationships by Accessing Admin> Reports> Relationships and entering the current term and the Role. If there are no relationships for that role established for the term, users with the role will not receive Email Notifications or be able to access other Privileges. Contact your Implementation Manager if you need assistance establishing these relationships for the current term.
    b. Is Silent Mode enabled? This setting prevents emails from being sent, except to a specified group of people. This mode is only meant for testing and should not be enabled again after your Starfish go-live date.

Technical Support:
Contact us at support@dostarfish.com. If you received a specific error message, please send a screenshot.

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