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STARFISH ENTERPRISE SUCCESS PLATFORM

The Starfish® Enterprise Success Platform™ is the suite of academic advising tools selected by Penn State to integrate with LionPATH to deliver advising notes, early progress reports (EPRs), and online scheduling of advising appointments.

Starfish offers the Penn State community—including faculty, staff, undergraduate and graduate students—access to a robust student success system that can flag students at risk, pinpoint areas of concern, reinforce positive academic engagement, and connect students with services and early interventions.

Academic advisers will use Starfish to connect with advisees, document advising interactions, and see interactions the student has had with instructors and other advisers.¹

Access to Starfish

Every Starfish user must be in a Starfish role (for example, “Instructor”) and in an active relationship with a student (for example, with students currently enrolled in a course taught by that instructor) to log in to Starfish.

Users are assigned to their role through a security process initiated through their unit. Basic information about students, users, roles, and relationships is imported daily from LionPATH.

Every interaction in Starfish relies on 1) what a particular role is permitted to see and do, 2) which students are connected to that user through that role, and 3) when that relationship is active.

This training document focuses on two Starfish roles:

- **Assigned Adviser:** This role is for the one-to-one relationship between an adviser and a student assigned to the adviser’s advising roster in LionPATH. Assigned Advisers will be able to see past and present information on any student assigned to their roster. The Assigned Adviser is visible in the student’s Success Network in Starfish.

- **General Adviser:** This role creates a relationship between an academic adviser and all students at Penn State, enabling an adviser to work with any student who needs help. This role is assigned to users through a security process initiated in their unit. The same information is available to General Advisers as is to Primary Advisers, but General Advisers are not visible in the student’s Success Network.

¹ While graduate students and members of the Graduate Faculty have access to Starfish for advising graduate students immediately, The Graduate School will be working with graduate programs to develop and implement robust advising tools specific for graduate education during the 2016-17 academic year.

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*Getting Started with Starfish for Academic Advising*
Lesson #1: Log in to Starfish

OBJECTIVES
Participants will be able to:
- Log into Starfish

LOGGING IN

Starfish is a web-based system, accessed through an Internet browser. Users log into Starfish with their Penn State credentials.

For training, we will use the Starfish test environment. This looks just like the live Starfish site. It displays real students who are connected to you, but does not communicate out to those students, so it’s a safe place to try things. FERPA requirements still protect the student data in this test system.

1. Open an Internet Browser (e.g. Mozilla Firefox).
2. Enter starfish test url into the browser address bar.
3. Enter your Access Account User ID and Password.
4. Enter your second-factor authentication.

The first time a user logs in, they will be asked to create appointment availability with the Office Hours Setup Wizard. Users can choose to see this page each time they have no remaining appointment openings.

Figure 1: Starfish Office Hours Setup Wizard page, the first page users will see on initial login
Lesson #2: Set up your profile

OBJECTIVES
Participants will be able to:
- Set up their Starfish profile
- Change preferences for appointments and notifications
- Add locations for meetings
- Name other Starfish user(s) as their Calendar Managers

SETTING UP YOUR PROFILE
Basic profile information is imported from LionPATH, which needs to be supplemented with user input information and preferences. This information is seen by students when making an appointment with you. A photo and personal information helps students feel more comfortable reaching out for help.

Your Profile has three sections: Institutional Profile, Appointment Preferences, and Email Notifications. You should update your preferences in each of those tabs.

![Starfish Profile page for non-student roles](image)

Figure 2: Starfish Profile page for non-student roles
Go to your Profile

Go to your Profile by clicking on your name at the Top Navigation bar.

Figure 3: Top Navigation bar

Personalize your Institutional Profile

NOTE: For training, you are in the Test environment, so students will not be able to see your changes.

1. Click on your name at the Top Navigation bar.
2. This automatically opens at the Institutional Profile tab.
3. Click the Upload Photo link.
4. Browse to a photo file (.jpg, .png, or .gif) on your computer.
5. Click the Upload Now button.
6. Add any additional phone numbers, email addresses, or other contact information desired.
7. Choose the email addresses where you wish to receive Starfish email.
8. Choose the Time zone you wish to use for appointment times and emails in Starfish.
9. Add information to the General Overview field that describes what you can do with students.
10. Add information to the My Biography field to convey your credentials to students.
11. Click the Submit button at the top or bottom of the page to save your updates.
12. Click OK to acknowledge the saved changes.

Adjust your Appointment Preferences

1. Select the Appointment Preferences tab.
2. Under Basics, select your minimum appointment length.

NOTE: This can be overridden when creating appointments on your calendar.

3. Set a scheduling deadline for students, if desired.
4. Under My Locations, add at least one place where you will schedule meetings.
5. Under Calendar Managers, add any other Starfish user who will have the ability to manage your Starfish calendar.
6. Click the Submit button at the top or bottom of the page to save your updates.
7. Click OK to acknowledge the saved changes.

Adjust your Email Notification Preferences

1. Select the Email Notifications tab.
2. Under Appointment Notifications, choose your preferences for how often, if at all, Starfish emails you about appointments.
• If you would like to receive .ical calendar attachments for appointments, leave the boxes for calendar appointments checked.

3. Under **Summary Emails**, choose your preferences for how often, if at all, Starfish emails you summaries of new tracking items and appointment activity.

4. Under **Tracking Item Notifications**, choose your preferences for how often, if at all, Starfish emails you about new tracking items.
   - The Flag Rules section shows you which tracking items you have permissions to receive emails about.

5. Click the **Submit** button at the top or bottom of the page to save your updates.

**NOTE:** Tracking items marked with an exclamation point will override your notification preferences.

To navigate away from your Profile, click any other menu item in the Top Navigation bar. To complete this example, click the **Home** button.

**EXERCISE**
Add your office location to your profile.

**ADDITIONAL INFORMATION**
You can view a Starfish-produced video demonstrating how to update your Profile on YouTube: [http://youtu.be/_a6WoFiM2l4](http://youtu.be/_a6WoFiM2l4)

**KNOWLEDGE CHECK**
How would you add an additional Calendar Manager?
Lesson #3: Orientation to the Starfish interface

OBJECTIVES
Participants will be able to:
- Navigate to each section of Starfish
- Toggle between Starfish roles
- Find services in the Service catalog

NAVIGATING IN STARFISH
Users navigate in four main tabs across the top navigation bar: Home, Appointments, Students, and Services.

Home
To access the Home page, click the Home tab in the Top Navigation bar.
The Home page shows your dashboard, which shows upcoming appointments, recent changes, and services to which you are connected.

![Figure 4: Default Starfish user’s Home page](image)

Each box on this screen will automatically open if there is content to be displayed. By using the pull down menus in each box, you can change aspects of the information displayed.
You can close menus and rearrange the boxes on your screen.

**Appointments**

To access your upcoming appointments, click on the **Appointments** tab in the Top Navigation bar. If you have appointments scheduled, you will see them in your **Agenda** view. You can also see appointments/appointment availability by **Day** or by **Week** by clicking on the desired tab.

![Agenda view on the Appointments tab](image)

**Figure 5:** Agenda view on the Appointments tab

Lesson #4 will explain how to add a student appointment to your calendar. A Starfish end-user guide (http://dostarfish.com/services/Documentation/EndUserConnectGuide.pdf) focuses on a variety of Starfish appointments and details calendar integrations.

**Students**

To access students who you are connected to in Starfish, click on the **Students** tab in the Top Navigation bar.

In this view, you see a list of students who have a relationship with you through your selected role. If you have multiple roles, you can change the list of students based on role with the **Connection** pull down menu.
Users can search for students in the Search bar in the Students section, or in the search in the Top Navigation bar.

**EXERCISE**

Use the Connection pull-down menu to view your currently assigned Starfish roles. Select each role and observe the change in list of students.

Identify a student from one of these connections to use in an upcoming exercise.

**Services**

To access all offices available to students through Starfish, click on the **Services** tab in the Top Navigation bar.

The Services tab shows an alphabetical list of all Services that have been configured in Starfish.
The Search Bar to the top right of the Services page allows users to search for Services or Service Members using any word, including names of individuals. The search will return results in two tabs: Services and Members.
EXERCISE

Search for your college/campus advising center. Click on it to open its information.

If there are individuals associated with a service, they are listed as **Service Members**.

To access Service Members, click on the service’s name in the **Service Catalog**.

![Figure 9: View of Service Members](image)

Service Members’ profiles and appointment availability are visible to Starfish users here.

Each Service Member controls whether or not students can schedule appointments online. Members may publish Office Hours even if they will not have students reserve appointments through Starfish.
Lesson #4: Create an appointment

OBJECTIVES
Participants will be able to:
- Distinguish among appointment types
- Add a student appointment to their calendar
- Create online appointment availability for assigned advisees

WORKING WITH APPOINTMENT TYPES
Appointments are grouped into types. Each Appointment type can be added or viewed by users in a particular Role.

Three appointment types are available to academic advisers.

- **Advising for assigned advisees**: Scheduled appointments or blocks of Walk-in time available to students who are in an Assigned Adviser relationship with the adviser.
- **Advising for any student**: Scheduled appointments or blocks of Walk-in time available to students who are in a General Adviser relationship with the adviser.
- **Orientation/NSO**: Scheduled appointments or blocks of Walk-in time available to students in a General Adviser relationship with the adviser, for use in the Orientation setting.

Appointment types are associated with Reasons and SpeedNotes.

- Appointment Reasons are selected at the time the appointment is created, and are viewable in the student’s history of contact.
- SpeedNotes are preconfigured activities that can be checked off to quickly capture commonly recurring meeting outcomes. See Lesson #6 for additional detail on SpeedNotes.

**NOTE**: Advising for assigned advisees and Advising for any student appointment types have the same set of Reasons and SpeedNotes.

**NOTE**: Orientation/NSO has one reason—Orientation—and a set of SpeedNotes focused on common Orientation topics.

ADDING APPOINTMENTS
An appointment needs to be created to use its associated Reasons and SpeedNotes.

Students may use Starfish to schedule their own appointments with you during times you have designated as available. Calendar owners and their designated calendar managers can add appointments to the Starfish calendar **without** creating online availability to students.
Adding a single appointment to the calendar

1. Go to the Appointments page
2. Click the Appointment button

![Appointment button](image)

Figure 10: Appointment button, used to add a student appointment to the Starfish calendar

This opens the Add Appointment form

![Add Appointment form](image)

Figure 11: Add Appointment form

3. Type the student’s name, PSU ID, or Access ID in to the Student drop down list box.
4. Select the desired student from the matches presented by Starfish.
5. Specify **When** the meeting will take place (date, start time, end time).
6. Select the location from the options available in the **Where** drop down list.
7. Select a **Reason** for the meeting.

**NOTE:** The available reasons are based on the student’s relationship to you and the appointment types through your role(s).

8. If relevant to the meeting, select a **Course** from the list presented.

9. Always leave the **Shared** radio button selected.

10. If desired, type a **Detailed Description** for the meeting that will be visible to the student and anyone else viewing the appointment.

11. Click the **Submit** button to schedule the meeting.

**Regular advising appointments**

Regular advising appointments will use a combination of *Advising for assigned advisees* and *Advising for any student* appointment types. If you have multiple relationships with the student, you will see appointment reasons associated with more than one appointment type. Select the appointment type and reason that best fits the situation.

**NSO advising appointments**

Advising contact during NSO or through another formal orientation program should always use **Orientation** as the reason.

**Exercise**

Add a 30 min student appointment to your calendar for today at 4:00 pm. The appointment will be in your office. The student would like to discuss transfer courses with you. If you are in the Assigned Adviser role, use a student on your advising roster. If you are in the General Adviser role, use any student.

Now, let’s try an NSO example. Add the same student to your calendar for today at 8:00 am for a 30 minute Orientation appointment. You will meet in a location other than your office for this. **Hint:** see Lesson #2.
Creating online appointment availability

If you would like students to be able to schedule their own advising appointments, you need to create online availability. The appointment availability will be visible to all Starfish users, but will only be selectable by students in the appropriate relationship for the appointment type you made available.

Create a block of available appointments

1. Go to the Appointments page
2. Click the Office Hours button

![Office Hours button, used to create online availability through the Starfish calendar](image)

This opens the Add Office Hours form

![Add Office Hours form](image)
3. Enter a **Title** (name) for this block of time.

**NOTE:** Students will see this **Title** when viewing your calendar. The weekly view display stops with the first space, and will only display up to 15 characters.

4. Select **What day(s)** you would like to make appointments available to students.

5. Indicate any recurrence (e.g. **Repeats** every 1 week).

6. Use the **What time** fields to enter the start and end time of the appointment block.

7. Select **Where** meetings will be held using the check box(es) next to your location(s).

**NOTE:** If you choose more than one location, the student will be able to choose his/her preferred location for the meeting (**e.g. Office or Phone**). You can add more locations by going to your Profile.

8. Select the **Office Hour Type** for meetings that will take place during this block.
   - Select **Scheduled Appointments Only** if you will not take any walk-ins between appointments.
   - Select **Walk-ins Only** to show the time is available, but disallow anyone from making advance appointments.

9. Select **How long** meetings can be by selecting a minimum and maximum duration.

**NOTE:** If the minimum and maximum duration are identical, the student will not be given a choice about duration. If they are different, students will be able to select their appointment length.

10. If your role has permissions for more than one **Appointment Type**, check the appointment type(s) that apply to this block of time.
   - Select **Advising for assigned advisees** if you want to only allow your assigned advisees to make online appointments during this time.
   - Select **Advising for any student** if you want to allow any student to make online appointments during this time.

11. Use the **Instructions** box to enter instructions to students who are attempting to schedule with you during this block of time.

**NOTE:** Use this area to indicate which students are able to select this appointment (e.g. For my assigned advisees only). Simple html formatting can be used here (e.g. `<b>`For my assigned advisees only</b> will format this text in bold)

12. Click the **Start/End Date tab** to set a time frame for a repeating office hour block.

13. Click the **Submit** button at the top or bottom of the Add Office Hours form to save your appointment block.
Example of advising appointment availability

In the example below, a block of 30 minute appointments, occurring between 8:30 am and 12:00 pm will be made available for assigned advisees on every Monday, Wednesday, and Friday beginning on 5/2/16 and ending on 5/6/16.

Figure 14: Example advising appointments recurring Monday, Wednesday, and Friday for assigned advisees only
Once Submitted, the calendar owner’s weekly view shows blocks of time available.

![Calendar view example](image)

**Figure 15:** Calendar owner view of appointment blocks from the example above

The calendar owner or calendar manager can add a student appointment to a block by clicking the **Add** icon in the calendar. This opens the **Add Appointment form**, with the date and time pre-filled.

**EXERCISE**

Add a student appointment to one of these appointment slots.

**STUDENT VIEW OF APPOINTMENT AVAILABILITY**

Students see available appointments, as well as time slots that are taken or no longer available. They do not see any details about other students or about your calendar.
Figure 16: Student view of appointment availability

To schedule an appointment, the student clicks on the Sign Up icon, which opens an Add Appointment form.

The student must enter a Reason from a pull down list. The list of Reasons is associated with the appointment type the calendar owner chose when creating the availability. With Penn State’s Starfish configuration, the list of reasons is the same for all advising appointment types except Orientation/NSO.
The student may choose to enter additional **Details** about this appointment.

Once the student clicks **Submit**, the appointment is scheduled on your Starfish calendar. In addition, an ical notification is sent to your UCS calendar. If integration has been configured for your unit’s Exchange of Google calendar, the appointment will be automatically added to your external calendar.

Additional information about configuring calendars is available in the Starfish end user guide

**EXERCISE**

Create advising appointment availability on Tuesday and Thursday mornings for the next two weeks. Make the appointments 30 minutes long. If you have the Assigned Adviser role, make these appointments available to your assigned advisees only.
Lesson #5: View a Student Folder

OBJECTIVES
Participants will be able to:
- Find a student’s folder
- Navigate to different types of information stored in the folder

FINDING THE STUDENT FOLDER
A student’s folder can be accessed by clicking on the student’s name anywhere it is displayed.

- Search for any student in the Top Navigation bar.
- Search for any student by using the General Adviser connection in the Students section.
- Search or scroll to an assigned advisee by using the Assigned Adviser connection in the Students section.
- Click on the student’s name from your calendar in the Appointments section.

Hovering over the student’s name provides summary information about the student, including a profile picture.

Figure 18: Hovering over the student’s name shows a preview of the student’s folder

Clicking on the student’s name opens the student’s folder.
EXERCISE

Open the folder for the student you scheduled for 4:00 pm today.

NAVIGATING WITHIN THE FOLDER

The view defaults to the Overview tab, with additional views of student information available from the menu on the left. Each of these views are described below.

A series of buttons along the top of the folder allows an adviser to use tracking items, or to communicate with the student. These features are discussed in detail in resources provided in the Appendix. The Appointment button opens the Appointment form, which was discussed in Lesson #4 in this guide.

Overview

The Overview tab shows summary information imported from LionPATH and indicates if the student has active warning flags in any course(s).

Info

The Info tab displays more detailed information imported from LionPATH, including the student’s ALEKS score – Named Math (Other) – in the Admissions section, the student’s citizenship and
financial aid eligibility under **Demographics**, the student’s degree program(s) under the **Programs** section, and the student’s semester standing, credit hours, and cumulative GPA under **Term Status**.

Advisers will regularly use **LionPATH** to acquire additional information about students. In particular, LionPATH must be used to view a student’s transcript, Degree Audit, What If Audit, and complete admissions information.

**Success Plans**

**Success Plans** are sets of preconfigured to-dos that an adviser can develop for a student. Success Plans have not been configured for Penn State yet; additional information will be made available during Fall 2016.

**Courses**

The Courses section shows the student’s current courses and their instructors. You can change the term to view past and future courses. Once connected to Canvas, this section may show additional information, depending on instructor use of Canvas.

**Tracking**

Starfish includes a set of tracking features that help instructors and advisers alert students to issues that need attention. Starfish has three categories of tracking items.

- **Flags** are warning flags raised by instructors in a course context, or by advisers in the context of a student’s overall plan.
- **Referrals** indicate to a student that they should visit an office or initiate a process.
- **Kudos** allow instructors and advisers to give students positive feedback, either in the context of a course or in the student’s overall progress.

The **Tracking** tab allows advisers to see all tracking items for a student.

**Meetings**

The **Meetings** tab shows the student’s history of meetings with advisers and instructors. This view always shows the most recent meeting at the top of the view.
Figure 20: The student's appointment history is visible on the Meetings tab.

The meeting’s **Reason** was generated with the creation of the Appointment.

Hovering over the calendar icon opens a pop out box that shows the meeting’s date, time, location and **Details** entered at the time the appointment was created.

Figure 21: Meeting details are visible by hovering over the calendar icon.
Clicking the plus button next to a meeting opens all details about the meeting, including the Details entered at the time the appointment was created, Comments added by the adviser, Activities selected in SpeedNotes, and the actual start and end time of the meeting.

![Figure 22: Additional meeting details are viewable by clicking the plus icon](image)

**Notes**

The Notes tab shows all notes recorded in Starfish. The most recently modified note is always at the top of the view.

Starfish allows a variety of note types, including notes attached to Appointments and tracking items. Advisers can also create Advising Notes separate from appointments and can view notes imported from legacy advising systems (eLion/ISIS and EARS).
Figure 23: The Notes tab shows all notes recorded in Starfish

**Network**

The **Network** tab shows all instructors and advisers who are in a relationship with the student. Clicking on the individual’s photo opens that person’s **Starfish profile** information.

**KNOWLEDGE CHECK**

What is your selected student’s major? What courses is this student taking this semester? Where would you find the contact information for one of the student’s instructors?

Close the student’s folder by clicking the X in the upper right corner.
Lesson #6: Document your interaction

OBJECTIVES
Participants will be able to:
- Document the outcomes of an advising interaction
- Locate this record in the student folder

DOCUMENTING ADVISING INTERACTIONS
Starfish is the University-wide system for documenting all advising interactions. Advising notes can be created without a Starfish Appointment, and are best used to document activities that happen outside of advising meetings. If you would like access to the preconfigured Reasons and SpeedNotes, or allow your office to do any reporting on appointment length, Reasons, or SpeedNotes activities, you will need to document outcomes with an Appointment.

Documenting outcomes of an appointment
Appointment outcomes can be accessed by clicking on the calendar icon anywhere it is displayed.

- On the Agenda tab of the Appointments section.
- On both of the calendar tabs of the Appointments section.
- In the Meetings section of the student’s folder.

1. Hover over the Calendar icon. This opens an appointment summary box.

Figure 24: Appointment summary pop-out box
2. Click the **Outcomes** button.

This opens the **Edit Appointment** dialog box.

![Edit Appointment dialog box](image)

Figure 25: Outcomes section of the Edit Appointment dialog box

3. Enter the actual start and end time of the meeting.

**NOTE:** Starfish will automatically populate the current time in the “Actual End Time” box.

4. If the student missed the appointment, clicking the **Attendance** box will create a missed appointment record and send a missed appointment email to the student.

5. Click the **Email** box if you would like the student to receive a copy of notes you type into the **Comments** box.

6. Type any narrative comments relevant for your advising interaction.

**NOTE:** These notes are visible to other advisers and to the student if requested. These notes should document the adviser’s interpretations of policy, recommendations, and factual summaries needed to maintain continuity in the advising relationship.

7. Click on the **SpeedNotes** tab.

This opens the **SpeedNotes** section of the Edit Appointment dialog box.
Figure 26: SpeedNotes section of the Edit Appointment dialog box

8. Click all boxes that apply to your interaction.

9. Click the **Submit** button at the top or bottom of the Edit Appointment form to save your notes.

**Viewing outcomes of an appointment**

Once submitted, this record is viewable in both the **Meetings** and **Notes** tabs of the student’s folder, described in Lesson #5.

**EXERCISE**

Document the outcomes of your 8:00 am Orientation appointment.

Now, document the outcomes of your 4:00 pm appointment.
Documenting other advising interactions

Two other notes types are available to advisers, Advising Note and General Shared Note.

- **Advising Note** is used by advisers to document comments available to other advisers.
- **General Shared Note** is used to share a note between instructors and advisers.

1. To create a note, navigate to the student’s folder.

2. Click the Note button at the top of the folder.

3. This opens the Create Note dialog box.

4. Select the desired note type from the Note Type pull down list.

5. Type a description for the note in the Subject line.

Figure 27: Note button in the student folder

Figure 28: Create Note dialog box
6. Type your comments in the Note box.
7. Use the check boxes to send a copy of the note to your email or to the student if desired.
8. Always leave the Shared button selected.

EXERCISE

For the student you met with today at 4:00, add an Advising note documenting that a transfer course is equivalent to a Penn State course.

Navigate to the student’s folder, and view the student’s history of meetings. Look at the complete set of Notes for the student.
Lesson #7: Walk-ins, Group Sessions, Events, and Reserve Time

OBJECTIVES
Participants will be able to:
- Describe situations when each session type is useful
- Create each type of meeting
- Document student interactions at each type of meeting

USING OTHER MEETING TYPES
Starfish provides the ability to schedule one-on-one appointments with students, but it also allows several other meeting types:

- **Walk-in.** Block of time available for unscheduled meetings.
- **Group Session.** A meeting made available to multiple students, who can sign up ahead of time.
- **Event.** Record student attendance at an event after the event concludes.
- **Reserve Time.** Take time away from previously created appointment availability.

Creating Walk-in availability
If you would like to create blocks of availability for students to drop in, use the Walk-in type of Office Hours.

Create a block of available appointments
1. Go to the **Appointments** page
2. Click the **Office Hours** button

![Figure 29: Office Hours button, used to create online availability through the Starfish calendar](image)
This opens the **Add Office Hours form**

![Add Office Hours form](image)

**Figure 30: Add Office Hours form**

3. Enter a **Title** (name) for this block of time, with maximum of 15 characters.

**NOTE:** Students will see this **Title** when viewing your calendar. The display stops with the first space, and will only display up to 15 characters.

4. Select **What day(s)?**

5. Indicate any recurrence (e.g. **Repeats** every 1 week).

6. Use the **What time?** Fields to enter the start and end time of the appointment block.

7. Select **Where?** Meetings will be held using the check box(es) next to your location(s).

**NOTE:** If you choose more than one location, the student will be able to choose his/her preferred location for the **meeting** (e.g. **Office** or **Phone**).

8. Select the Office Hour Type for meetings that will take place during this block.

   - Select **Walk-ins Only** to show the time is available, but disallow anyone from making advance appointments.

9. If your role has permissions for more than one **Appointment Type**, check the appointment type(s) that apply to this block of time.

10. Use the **Instructions** box to enter instructions to students who are attempting to schedule with you during this block of time.
NOTE: Anyone who views your calendar will be able to see your Walk-in hours. Use the Instructions to make it clear who you are willing to see during this time. Simple html formatting can be used here (e.g. <b>For my assigned advisees only</b> will format this text in **bold**).

11. Click the **Start/End Date tab** to set a time frame for a repeating office hour block.

12. Click the **Submit** button at the top or bottom of the Add Office Hours form to save your appointment block.

EXERCISE

Add a block of walk-in availability for any student on a Tuesday morning from 10:00 am – noon.

Documenting a walk-in conversation

If your office has a Starfish kiosk, the appointment will be created when the student checks in. If your office does not have a kiosk, you will add a walk-in meeting and document the outcomes of the appointment when you meet with a student.

1. Go to the Walk-in office hours block on your calendar.

   ![Figure 31: Add a Walk-in Meeting button](image)

2. Click the Add symbol to **Add a Walk-in Meeting**.
This opens the **Add Walk-in Meeting form.**

![Add Walk-in Meeting form](image)

**Figure 32: Add Walk-in Meeting form**

3. Search for and select the desired student from the **Student pull down menu.**

4. Select **Where** the meeting took place.

5. Select the **Reason** for the meeting.

6. Add a **Course,** if relevant.

7. Always leave the **Shared** radio button selected.

8. If desired, add additional details in the **Detailed Description** box.

9. Click **Submit** at the top or bottom of the Add Walk-in Meeting form.

**NOTE:** If you wish to go directly to **Outcomes** or **SpeedNotes,** you can do that before submitting the appointment.

**EXERCISE**

The student you met with previously is now at this walk-in block to see you. Add the student.
Once the appointment is created, you can navigate to the student folder by clicking **View Meetings** in your Walk-in office hours. This pops out a small box showing all students during that office hour block.

![Figure 33: View Meetings in Walk-in office hours block](image)

1. Click the desired **student’s name** to open the student’s folder.

**NOTE:** Once you’ve viewed the student’s information, you can navigate to the appointment from the Meetings tab in the Student Folder, or from the Walk-in office hours block. Instructions below are for accessing the meeting from the **Walk-in office hours block**.

2. Click either the **time** or the **calendar icon** to open the Add Walk-in Meeting form.

3. Click the **Outcomes** tab to document outcomes.

4. Click the **SpeedNotes** tab to select appropriate SpeedNotes.

5. Click **Submit** at the top or bottom of the Add Walk-in Meeting form.

**EXERCISE**

View the Walk-in student’s advising folder. Now document outcomes for the walk-in conversation.
Creating Group Sessions

A Group Session is a meeting made available to multiple students, who can sign up ahead of time.

Create a Group Session

1. Go to the Appointments page.
2. Click the Group Session button.

![Group Session button](image)

This opens the Add Group Session form.

![Add Group Session form](image)

3. Create a Title for the session.
4. Select When the session will take place.
5. Select Where the session will take place.

NOTE: If the desired location is not available, you can add a new location in your Profile.

6. Select a Reason from the pull-down list, noting the appointment type associated with the selected reason.
7. Enter the maximum number of students who can attend the session.
8. Check the box if you would like students to be able to see who else has signed up for the session.
9. Leave the Support Supplemental Instruction box unchecked.
10. Use the **Instructions** box to enter instructions to students.

11. Select a **Start/End date** if the session is recurring.

12. Click **Submit** at the top or bottom of the Add Group Session form.

**EXERCISE**

Create a group session on Thursday morning from 9:00 – 10:00 am for up to three students for Orientation.

**Manage Group Session Participants**

You or your Calendar Manager can add students to the Group Session. Students may also schedule the group session through Starfish if they are in a relationship with you that matches the selected appointment type.

To manually add students to the Group Session:

1. Go to the **Appointments** page.

2. Click the **Manage Participants** link in the Group Session calendar block.

![Figure 36: Group Session time block on the Starfish calendar](image)

This opens the **Manage Session Participants** form.
3. Search for student in the Add participant pull down menu.
4. Click Add.
5. Repeat until all students have been added.

**NOTE:** The form will show a running count of the remaining available spaces.
6. Click Submit at the top or bottom of the Manage Session Participants form.

**EXERCISE**
Add the student you’ve been using as an example to the participant list. Then add a second student.

**Document Group Session**
You can view a list of students signed up for the group session by clicking the Manage Participants link on the calendar. Note, however, that you cannot navigate to student folders from this list. Once the Manage Session Participants form is open, you also have access to the Outcomes and SpeedNotes associated with the appointment type you selected on creating the Group Session.

1. Go to the Appointments page.
2. Click the Manage Participants link in the Group Session on your calendar.
3. Click the Outcomes tab.
4. Enter the actual start and end time of the Group Session if desired.
5. Enter any narrative notes or select the Student missed session box for each student, as desired.
NOTE: A narrative outcomes box is available for each student, allowing for different notes associated with each student.

6. Click the SpeedNotes tab.

7. Select the appropriate SpeedNotes for the Group Session.

NOTE: The available SpeedNotes are associated with the appointment type selected when creating the session. The activities selected here will be documented for every student.

8. Click Submit at the top or bottom of the Manage Session Participants form.

EXERCISE

View the Outcomes for the group session. Add a different note for each, select some SpeedNotes, and submit.

Creating Events

An Event allows you to document attendance for multiple students after the Event has concluded.

Create an Event

1. Go to the Appointments page.

2. Click the Event button

This opens the Create Event form.

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3. Enter the event **Title**.
4. Enter the Event’s **date**.

**NOTE**: The date must be the current date, or a date in the past.
5. Enter the Event’s **time**.

**NOTE**: The time must be in the past.
6. Select the **Location** from the pull down list.

**NOTE**: If the desired location is not available, you can add a new location in your **Profile**.
7. Select a **Reason** from the pull-down list, noting the appointment type associated with the selected reason.
8. Click **Next**.

This opens the **Attendees tab** in the Create Event form.

![Attendees tab of the Create Event form](image)

9. Select the type of **Student Identifier** you will use.
   - **Username** is the student’s Penn State Access id (e.g. abc5432)
   - **Student ID** and **Integration ID** are the same. Both are the student’s Penn State ID number (e.g. 987654321)
10. Enter the appropriate information for each **Attendee**, separating each student identifier with a comma.
11. Click **Next**.

This opens the **Outcomes** tab.
12. Enter notes that you would like visible in all attendees record.
13. Click the **SpeedNotes** tab.
14. Select the appropriate **SpeedNotes**.
15. Click **Submit** at the top or bottom of the Create Events form.

**Creating Reserve Time**

Reserve Time allows you to **take away** online availability from a previously created block of appointments. If you are using UCS as your primary calendar, you will use this function to take away appointment time if a meeting or other obligation conflicts with appointment availability.

**Create Reserve Time**

1. Go to the **Appointments** page.
2. Click the **Reserve Time** button

![Reserve Time button](image)

This opens the **Reserve Time** form.

![Reserve Time form](image)

3. Name this block of time in the **Description** box.

**NOTE:** This description will only be visible to you and your Calendar Manager(s).

4. Enter **When** the reserve time is to be placed, including date, start time, and end time.
5. Select any repeat options if applicable.
6. Click **Submit** at the top or bottom of the Reserve Time form.

If the Reserve Time overlaps with previously scheduled student appointments, Starfish will generate an Operation status warning, and will not schedule the Reserve Time.
You can cancel the conflicting student appointment.

1. Bring up the appointment details by hovering over the calendar icon
2. Click the Cancel button.

This opens the Cancel Appointment form.

3. Enter any additional details you wish to send the student.
4. Click the Submit button at the bottom of the Cancel Appointment form.

This deletes the appointment from your calendar, and the Reserve Time can now be placed.

**EXERCISE**

Use reserve time to take time away from your Friday appointment block for a one hour meeting from 10:00 – 11:00 am.
Appendix/Topic Resource/Works Cited

Find Penn State’s resource for Starfish information, training, and help at http://sites.psu.edu/starfishinfo

End-user guides, including guides developed by Starfish that supplement topics introduced in this guide are available at http://sites.psu.edu/starfishinfo/training/

Additional information on online appointment scheduling is available at http://dostarfish.com/services/Documentation/EndUserConnectGuide.pdf

Additional information on kiosk and waiting room management is available at http://dostarfish.com/services/Kiosk-EndUserDocumentation.pdf

Additional information on how to document attendance at events is available at http://dostarfish.com/services/Documentation/HowtoAddViewEventAttendance.pdf

Starfish-produced videos demonstrating how to interact with various Starfish features are available at http://sites.psu.edu/starfishinfo/videos-and-visuals/

A 26 minute video on navigating and documenting in Starfish is available at http://dostarfish.com/services/IndepthDemo2014_2/IndepthDemo2014_2_player.html

A 2 minute video on updating your profile is available at http://youtu.be/_a6WoFiM2l4

A 2 minutes video on the student folder is available at https://www.youtube.com/watch?v=1Qfa1BvPdu4&feature=youtu.be

A 5 minute video on ways instructors will use Starfish is available at https://www.youtube.com/watch?v=2Orc2nqWnWM
Technology Training Resources

Through ITS Training Services

Find face-to-face and online training workshops through Penn State ITS Training Services at http://ittraining.psu.edu/workshops/

Request Training On Demand (sessions upon request for groups of five or more) at http://ittraining.psu.edu/workshops/

Explore thousands of free video tutorials that are available for self-paced learning at http://lynda.psu.edu/

Take free Microsoft eLearning courses or find out more about free certification vouchers at http://msitacademy.psu.edu/

Discover training news, fun tips, and session reminders via social media on @psuITStraining (Twitter) http://www.facebook.com/psuitstraining/ (Facebook)

Join one of our news lists to receive monthly email notification of all upcoming technology training opportunities, by sending a blank email to L-TRAINING-NEWS-SUBSCRIBE-REQUEST@LISTS.PSU.EDU (Training News List) L-FACTORYTECHTRAINING-SUBSCRIBE-REQUEST@LISTS.PSU.EDU (Faculty Training List) L-CAMPUS-TECHTRAINING-SUBSCRIBE-REQUEST@LISTS.PSU.EDU (Campus Training List)

Additional Technology Resources

Contact the IT Service Desk with general technology-related questions by emailing ITServiceDesk@psu.edu or call 814-865-4357 (HELP)

Search for technology-related information in the IT Knowledge Base at http://kb.its.psu.edu/

Purchase discounted software or software licenses through Penn State at http://software.psu.edu/

Access free online books about popular technology topics through the Penn State Libraries at http://proquest.safaribooksonline.com/

ITS Training Services at Penn State

23 Willard Building • University Park, PA • 16802 • Phone: 814-863-9522
Fax: 814-865-3556 • itstraining@psu.edu • http://ittraining.psu.edu