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Add a Note to the Student Folder

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Intro: Adding a note to a student folder involves creating a concise record or comment related to a student's performance, behavior, or academic progress. These notes serve as a means of documentation and communication within educational institutions, helping instructors, advisors, and administrators to track and share important information about individual students for reference and decision-making. It's a way to maintain a comprehensive record of a student's journey and provide insights for better support and guidance.

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Key Benefit: One of the key benefits to choosing this option is you can share notes with other staff members.

1. Use the Quick Search to select a student.

The screenshot shows the Starfish EAB interface. At the top, there's a navigation bar with 'Starfish' and a search bar containing 'hcollins'. Below the navigation bar, there are tabs for 'Office Hours', 'Appointment', 'Group Session', 'Event', 'Scheduling Wizard', 'Reserve Time', and 'Record Attendance'. A system announcement is visible: 'System Announcement: Fall course approvals are required for registration and must be in by the end of the month.' Below that, there's a link for 'Outstanding Progress Surveys: Microbiology II (SCI-BIOL202-600-202002): 3 Question Flag Survey, more...'. The main content area is divided into 'My Services' and 'Batch Sent Items'. 'My Services' includes 'Advising Center' with contact information (703-555-9876, advising@starfishcollege.test, http://starfishcollege.test/advising) and a 'Waiting Room' section stating 'Waiting Room is enabled for students. There are no students in the waiting room.' 'Batch Sent Items' is a table with columns: Action, Date Sent, No. of Recipients, and Completion Status. It lists three 'Raise Flag' actions, all completed on 08-07-2020.

2. Select **Note**.

3. Select a **Note Type**. The information you find in the **Note Type** drop down is based on your relationship to the student and the associated permissions for that role. Attachments are available for certain Note Types, depending on how your institution configures them. Currently, you can only add one attachment to a note. The attachment maximum is 25MB. We accept .jpg, .jpeg, .png, .doc, .docx, .pdf, .rtf, .tif, .tiff, .txt, .xls, and .xlsx as attachments.

4. Enter a date in the **Date** field to represent when the note was created.

5. (Optional) Enter a **Subject** for the note.

6. Enter your note in the **Note** field.

7. (Optional) Select **Send of note to yourself**.

8. (Optional) Select **Send copy of note to student**. Students do not have any View permissions to notes added to their student folder this way. If you do not email the note to the student, they will not have access to it.

The screenshot shows the 'Create Note' dialog box in the Starfish EAB interface. The dialog has a title bar 'Create Note' with 'Never Mind' and 'Submit' buttons. It contains several fields: 'Note Type' (Assignment Guidelines), 'Date' (01-11-2024), 'Subject' (empty), and 'Note' (Hi student, this note may include an attachment). Below the 'Note' field, there's a message: 'We accept jpg, jpeg, png, doc, docx, pdf, rtf, tiff, txt, xls, and xlsx as attachments.' and a link 'Add Attachment' with the text 'No file chosen...'. There are two checkboxes: 'Send copy of note to yourself' (unchecked) and 'Send copy of note to student' (unchecked). Below these, there's a 'Note Sharing' section with 'Shared' selected and 'Private' unselected. A 'FERPA Notice' states: 'This note is not disclosable under FERPA'. 'Note Permissions' lists roles: Academic Advisor, Career Advisor, Counselor, Faculty Advisor, and General Advisor. A 'More...' link is at the bottom of the permissions list. At the bottom of the dialog, there's a 'Required fields' section with 'Never Mind' and 'Submit' buttons. The background shows the 'Harper Collins' student profile with various tabs (Overview, Info, Success Plans, Degree Planner, Courses, Tracking, Student Surveys, Meetings, Notes, Network) and contact information.

Tip: The **Note Permissions** display once you've selected a **Note Type**. The **Shared** option allows users with the roles listed who have a relationship with the student view the note of the student folder. When the **Private** option is selected only you can access the Note (unless you select Send copy of note to student.)

6. Select **Submit**.

Important: Copy and paste this line to create a note call out box. Use this to replace the Note, Tip, Recommend, and Key Concept boxes in Starfish articles.

Note: **Read receipts** must be enabled for your environment to identify when a student has read your email. This feature is only available for emails created in Starfish by using the **Note** button, or the **Message** button within the *Student Folder*.

Bulk Actions

You can perform bulk actions when interacting with students by using the **Select All** feature. The **Select All** maximum is 15,000 students or items. If you reach this limit, you will be prompted to adjust your filters before making a selection.

Caution: When sending ~5000 notes or meetings at once, these items could take upwards of 24 hours to finish sending. When these items are sent in large batches and the job gets interrupted, the interruption could cause duplicate emails to be sent. Therefore, we recommend sending notes or meetings in smaller batches.

1. When using Select All, consider that you may have different role permissions for different students. For example, you may need to choose a Role from the Connection drop down menu to raise certain Flags or create certain Notes.
2. From the My Students, Tracking, or Student Surveys page, check the Select All checkbox to select all students that meet your search criteria. You'll notice at the bottom of the page the total number of students that have been selected.

The screenshot shows the Starfish interface with the 'TRACKING' tab selected. At the top, there are navigation tabs: OVERVIEW, MY STUDENTS, TRACKING, STUDENT SURVEYS, ZOOM IN, ATTENDANCE, and PROGRESS SURVEYS (4). Below these are action buttons: Resolve, Comment, Assign, Flag, Referral, To-Do, Kudos, Success Plan, Send Message, and Download. A search bar at the top right says 'Search for Students'.

Below the navigation, there are filters for Student (Student Name, Username, or ID), View (Active and Resolved), Connection (All My Students), Cohort, and Additional Filters. A 'Go' button is next to the Student filter, and 'Edit Filters' and 'X' buttons are next to the Additional Filters.

The main table has columns: Student, Success Score, Item Name, Status, Created Date, Resolved Date, Assigned To, and Due. The first row is highlighted with a red box around the checkbox. Below the table, a red box highlights 'Selected: 130'. At the bottom right, it says 'Displaying 1 - 25 of 130 Items'.

Student	Success Score	Item Name	Status	Created Date	Resolved Date	Assigned To	Due
<input checked="" type="checkbox"/> Mack, Emma emack	54	Complete Senior Seminar Student Closeable	Active	Yesterday by Instructor, Yolanda			Today
<input checked="" type="checkbox"/> Sand, Emily esand4378	67	Behavior Concern	Active	Yesterday by Instructor, Yolanda			
<input checked="" type="checkbox"/> Lands, Rachel rlands	52	Behavior Concern	Active	Yesterday by Gladstone, Steve		Instructor, Yolanda on Yesterday	
<input checked="" type="checkbox"/> Mack, Emma emack	54	Off-Track Degree Plan Context: Issues with requirements that affect other requirements in the student's program.	Active	Yesterday by System		Gladstone, Steve on Yesterday	
<input checked="" type="checkbox"/> Mohamed, Kaleb kmohamed456	34	Missed Assignment Context: Microbiology II: Missed Assignment 5 Deadline by 2 days.	Active	Yesterday by System			

3. Perform your bulk action such as add a note or raise a flag, etc. Keep in mind, you can only perform bulk actions based on permissions set by your Starfish Administrator.

Tip: If these tracking item buttons do not display on the Student List, please contact your Starfish Administrator to add the Bulk Actions on Students privilege set.

Tip: When you want to select multiple students then apply an Additional Filter, we recommend adding the Additional Filter criteria first. This will retain your filter settings. If desired, you could then narrow down your results further by selecting the View, Connection, Term, or Cohort drop down. (Note: The My Students and Tracking tabs, have slightly different drop down options.)

If you have selected less than 50 students the system will process your request immediately. If you have selected 50 or more students, the system processes the selection as a batch action to avoid system performance issues.

4. If you selected 50 or more students you will receive the following confirmation page. Select **Yes, Finish** to confirm your selection.

The image shows the Starfish application interface. At the top, there's a navigation bar with 'Starfish' and a search icon. Below it, tabs for 'OVERVIEW', 'MY STUDENTS', 'TRACKING', 'INTAKE', 'ZOOM IN', and 'ATTENDANCE' are visible. A toolbar contains icons for 'Flag', 'Referral', 'To-Do', 'Kudos', 'Success Plan', 'Message', 'Note', 'Download', and 'Prospect'. A search bar is present with the placeholder 'Student Name, Username, or ID' and a 'Go' button. A table lists students with columns for 'Name', 'Retention Score', and 'Phone'. Three students are visible: David Acosta dalbright (92), Brian Adams badams (92), and Randy Albright ralbright (76). A modal dialog box is open in the center, asking 'Are you sure about that?' and stating 'You are about to raise a flag on 207 students.' It has two buttons: 'CANCEL' and 'YES, FINISH'.

Next, you will receive the following message indicating your batch action has been queued.

The image shows a confirmation message box. At the top, it says 'Your **flag** is in the queue!'. Below that, it says 'A **flag** is in the queue to send to **207 students**. It could take several minutes to complete.' In the center is a large icon of a flag. Below the icon is a blue button with the text 'BACK TO STUDENT LIST'. At the bottom, there is a link: 'Review queued items on the Home page'. At the very bottom, it says 'Did you make a mistake? There's still time to [cancel the batch send.](#)'

What happens next?

There are several options you can do next:

- **Back to Student List** upon selection your batch request begins and you are returned to the My Students page.
- **Review queued items on the homepage** upon selection your batch request begins and you are directed to the Home page where you can track the status of the action(s) in the **Batch Sent Items** widget.
- **Cancel the batch send** upon selection your batch send job is canceled. No action has occurred.

Note: Batch jobs may take some time to complete. Be sure to check the queue on the Home page to monitor the progress.

Tip: If you remain on this page and the computer is idle for 2 minutes, the page automatically refreshes, the batch job begins to process, and you are returned to the student list.

Locating and Managing Notes

Staff Experience

You will get an email from Starfish where you can review the note, and will be instructed to log into Starfish to access any attachments.

To locate notes:

1. Within Starfish, locate the student using the **Quick Search** (or other method).
2. Click on the **Student Name** to open the Student Folder.
3. Select the **Notes** menu option. Notes that have attachments display a paperclip icon next to the note.
4. Click the **Expand** icon to view the note and access any attachments based on your permissions.

Fred Dorati

Flag Referral To-Do Kudos Success Plan Message Note Appointment File

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

Created In Term: All Written By: Anyone Note Type: Any


Type	Subject	Written By	Date
Advising Note	Meeting follow up	Yvette Gold Role: Primary Advisor	Today
Appointment Comment	Appointment with Fred Dorati on 2/10/2023 for Academic Renewal	Don Maltz Role: Faculty Advisor	02-10-2023
To-Do Comment	Complete Comment 3. Explore Careers & Programs	Yvette Gold Role: Primary Advisor	01-26-2023
To-Do Comment	Complete Comment Register for Placement Tests	Yvette Gold Role: Primary Advisor	01-26-2023
To-Do Comment	Complete Comment Submit Student Intake Form	Yvette Gold Role: Primary Advisor	01-26-2023
To-Do Comment	Create Comment Complete College 1	Yvette Gold Role: Primary Advisor	09-08-2022
Referral Comment	Create Comment Academic Skills Center Referral	Yvette Gold Role: Primary Advisor	09-22-2021
Advising Note	No Subject	Yvette Gold Role: Primary Advisor	08-04-2021
Message	bulk message	Yvette Gold Role: Primary Advisor	08-04-2021

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Student Experience

An email will be sent to the student where they can review the note, and will be instructed to log into Starfish to access any attachments.

1. Within Starfish, select the hamburger menu then select **Messages**.
2. Click to open the appropriate note. The note and attachment (if applicable) is displayed.

 **From:** notices@starfishsolutions.com
To: success@starfish.edu, jmulinsjob@yahoo.com

Mon, Feb 26 at 10:44 AM

The following note has been added to your student folder by Yvette Gold:

Fred,

It was great meeting with you today. Login to Starfish to view attached document discussed in our meeting.

To follow-up on this note, please contact Yvette Gold at starfish@eab.com.

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No

0 out of 0 found this helpful

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