



Prospective Student Advising

Purpose

This document provides information about how the Starfish’s Prospective Student Advising feature works and includes guidance for configuring the feature.

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About Prospective Student Advising

Advising occurs pre-admissions, and the information captured in those early meetings can be the most critical. But no enrollment means no account in the SIS or in Starfish to capture advising notes. Critical information is lost or inaccessible to advisors when the student does enroll

Starfish's Prospective Student Advising feature addresses this issue by facilitating the creation of student accounts where notes can be captured and later associated with the admitted student. At a high level this feature allows your institution to:

- Configure your system to work with prospective students.
- Create prospective student accounts (staff and prospective students themselves can be permitted to create accounts).
- Schedule appointments with prospective students.
- Document within Starfish meeting outcomes and notes taken on advising activity with the prospective student.
- Send email messages and copies of meeting outcomes and notes to prospective students through Starfish.
- Manage prospective student accounts and merge accounts with the student record from the SIS once the student enrolls.
- Report on prospective student meeting activity.

The Prospective Student Advising feature is only available with a Starfish CONNECT license and is priced separately. Please contact your Account Manager for more information.

Configure your system to work with prospective students (tenant admin user)

The Tenant Admin user controls whether or not the feature is available and which user roles will have access to it. Configuration steps include:

1. [Enable the feature and establish requirements for prospective student accounts](#)
2. [Give desired roles permission to create prospective student accounts](#)
3. [Set up at least one appointment type that can be used for prospective students](#)
4. [Set up at least one note type that can be used for prospective students](#)
5. [Enable prospective student account creation on the Kiosk if desired](#)

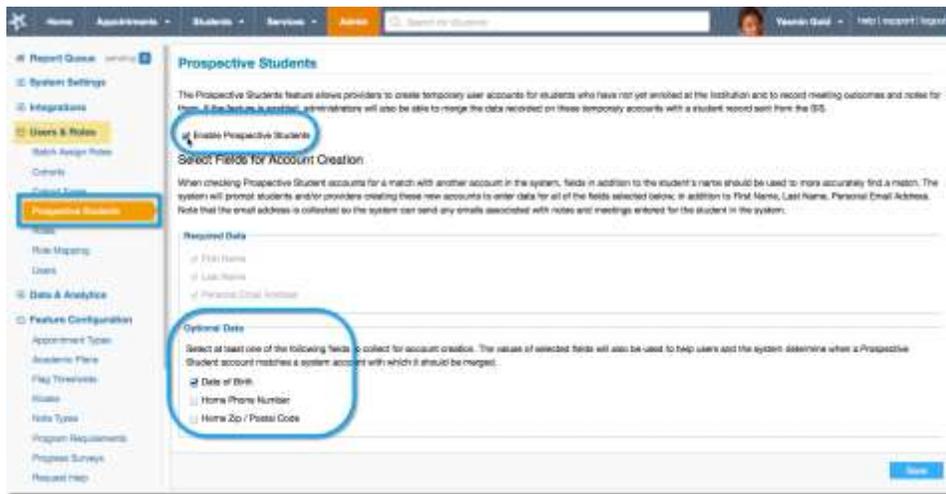
More information on each of these configuration steps is provided below

Enable the feature and establish prospective student account requirements

Select the **Prospective Students** option within the **Users & Roles** section of the Admin menu.

Enable the feature by checking the box labeled Enable Prospective Students in the top section of the Prospective Students page.

First Name, Last Name, and Personal Email Address are required data for creating prospective student accounts. At least one optional field (**Date of Birth, Home Phone Number or Home Zip/Postal code**) must also be selected as a required field for prospective student accounts.

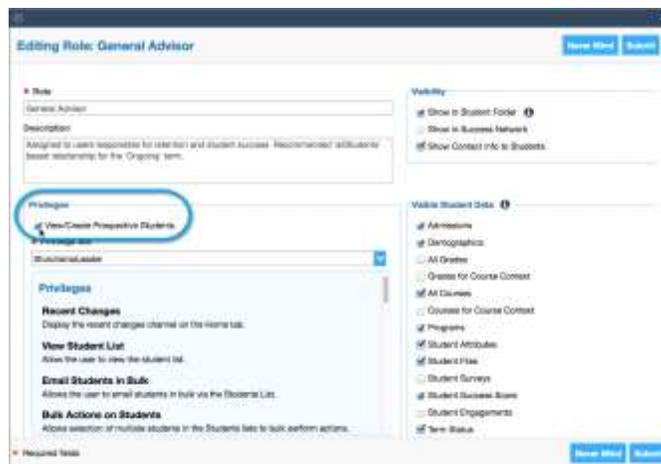


Give desired roles permission to create prospective student accounts.

Select **Roles** from within the **Users & Roles** section of the **Admin** menu, and then click on a role name to edit permission for that role.

Check the box labeled **View/Create Prospective Students** and Click the **Submit** button.

Repeat these steps for each role that must be able to work with prospective students.



Set up at least one appointment type that can be used for prospective students.

Select **Appointment Types** from within the **Feature Configuration** section of the **Admin Menu**. Click the add **Appointment Type** button to create a new appointment type to be used with prospective students, or click the edit icon (✎) associated with an appointment type to edit an existing appointment type to be used for capturing prospective student meetings.

Add/update any required information on the **Properties** page, then click the **Next** button to reach the **Permissions and Referrals** page of the **Add/Edit Appointment Type** wizard.

Check the box labeled **Allow usage for Prospective Students** beneath the list of roles to allow this appointment type to be used for prospective student meetings.

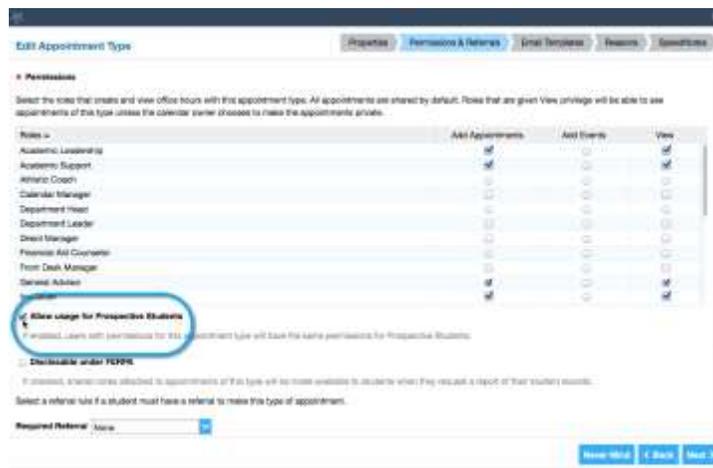
Proceed through the wizard and click the **Finish** button on the final page to save your changes.

Repeat this steps for each appointment type to be used with prospective students.

Important Notes:

Make sure that the [roles to which you provide the ability to view/create prospective students](#) are also granted permission to **Add** and **View** appointments of at least one type of appointment that has been marked to allow usage for prospective students.

Prospective students will get the appointment message template designated for students in the appointment type, so if you use an existing appointment type, verify that the student facing template will make sense to a prospective student.



 **Best Practice:** Add a group of SpeedNotes to any appointment type that will be used for prospective students geared toward their specific needs.

Set up at least one note type that be used with prospective students

As with appointments, note types must be configured to allow use with prospective students in order to have an **Add Note** option on the Prospective Student Folder.

Select **Note Types** from within the **Feature Configuration** section of the **Admin Menu**. Click the add **Note Type** button to create a new note type to be used with prospective students, or click the edit icon (✎) associated with a note type to edit an existing note type to be used for capturing prospective student notes.

Add/update any required information and check the box labeled **Allow usage for Prospective Students**.

Choose which roles will be permitted to Add notes of this type and who will be able to view notes that have been shared, then click the **Submit** button to save the **Note Type**.

Edit Note Type

Note Type: Prospective Student Note

Description: Use this type for prospective students

Template: Prospective student note

Allow usage for Prospective Students
If enabled, users with permissions for this note type will have the same permissions for Prospective Students.

Disclosable under FERPA
If checked, student for whom a note of this type is added will see this note when they request a report of their student records.

Privileges
Select the privileges assigned to this note for each note type. Note that the View Shared Notes privilege allows users with the role to view notes written by others only if the note has been shared with others.

| Role | Add | View Shared Notes |
|---------------------|-------------------------------------|-------------------------------------|
| Academic Leadership | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Academic Support | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Athletic Coach | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Required fields: [Reset Values] [Submit]

Important Note:

Make sure that the [roles to which you provide the ability to view/create prospective students](#) are also granted permission to **Add** and **View** notes of at least one type that has been marked to allow usage for prospective students.

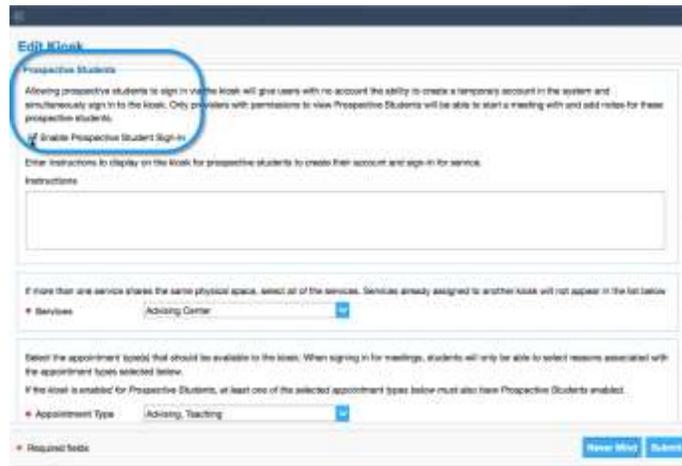
Enable prospective student account creation on the Kiosk if desired

To allow prospective students to self-identify and sign in to a Starfish Kiosk associated with a waiting room, you must enable prospective student sign in for the Kiosk.

Select **Kiosks** from within the **Feature Configuration** section of the **Admin** menu.

Click the add **Kiosk** button to create a new kiosk, or click the edit icon (✎) associated with an existing kiosk where prospective students will be allowed to sign in.

Check the box labeled **Enable Prospective Student Sign-In** and add instructions to help prospective students sign in. click the **Submit** button to save your changes.



Important Note:

Make sure that the appointment types selected for the kiosk are [set up to be used with prospective students](#).



Best Practice: Use the Instructions field or your custom Kiosk content to help prospective students know how to sign in. Clarify that they should use the name and contact information that matches what they will/have applied or registered with so that their information can be connected to the right account.

Create prospective student accounts (staff member)

Once the feature is configured, accounts can be created by those in roles with permission to create prospective student accounts or by prospective students themselves when signing in to a kiosk if configured to support prospective students.

To reduce the risk of duplicate accounts, account creation can only be reached through workflows where the user has already searched existing prospective student accounts. This allows the user to verify that the account does not already exist.

Verify the prospective student account does not exist

Staff members with permission to view/create prospective students via at least one role will be able to begin creation of a prospective student account from one of two places:

1. **From the Search for Students search box:** After entering search criteria, the **Find/Create Prospective Student** icon (👤➕) will be available at the top of the results list whether or not there were any matches to the search criteria.

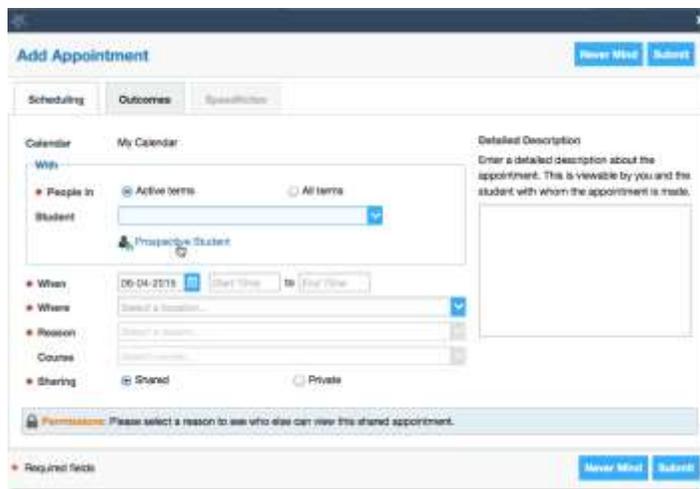


Important Note:

Any existing prospective students that match your criteria **will be** included in search results labeled as “Prospective Student”. Click the name of an existing prospective student within the search results to open the [Prospective Student Folder](#).

To continue with the process to create a new account click the **Prospective Student** icon. You will still be required to enter additional search criteria to find/verify that there is not a matching prospective student account before you will be able to create a new account.

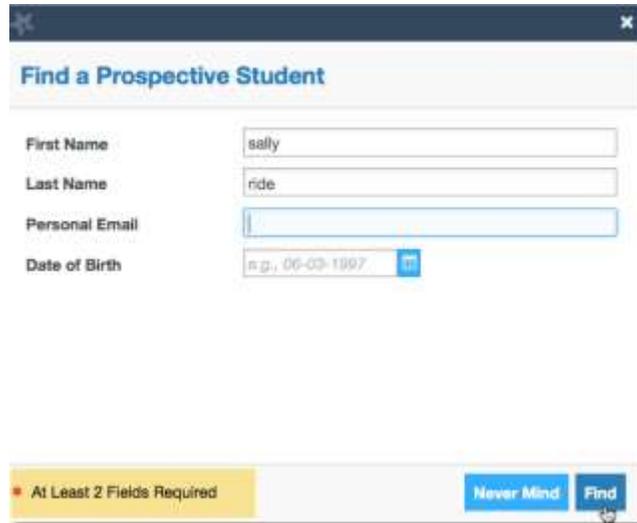
2. **From the Add Appointment form:** The Find/Create Prospective Student icon (👤➕) is included on the **Scheduling** tab of the **Add Appointment** under **Student** selector. Click the icon to begin the process of finding/creating a new account.



Important Note:

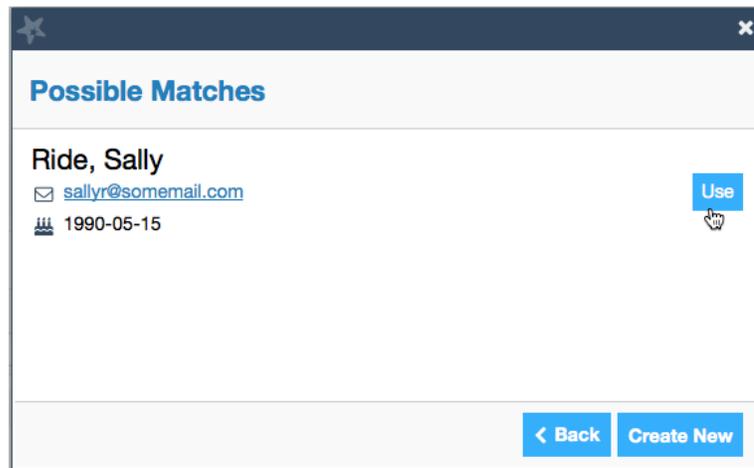
prospective student accounts **will not** be included in the search results if criteria are entered into the **Student** drop down selector. In order to work with a prospective student within the **Appointment** form, the user must select the **Find/Create Prospective Student** icon to find an existing prospective account to use or to create a new account. .

After selecting the **Find/Create Prospective Student** option (👤), you will be prompted to enter at least two pieces of information about the student. Options will include **First Name**, **Last Name** and **Personal Email** address as well as the additional required field(s) that have been configured (e.g. **Date of Birth**).



Click the **Find** button to receive a list of possible matches with options to:

- **Use** the listed prospective student. This option appears only if at least one possible match is returned.
- **Create New** prospective student account. This option appears whether or not possible matches are returned.



Select **Use** to work with the student listed.

Select **Create New** to create a new prospective student account.

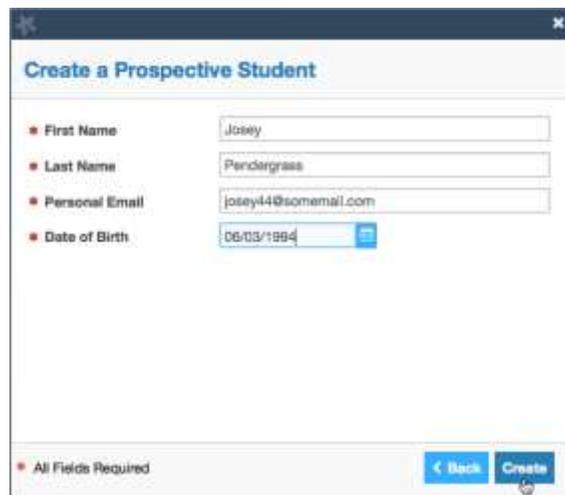
Create a prospective student account

After following the [Find/Create Prospective Student](#) (👤) process as described in the previous section, you will have the option to create a new prospective student account by clicking the **Create New** button on the **Possible Matches** page of the Find/Create Prospective Student dialog.



The **Create a Prospective Student** form prompts you to provide **First Name**, **Last Name**, and **Personal Email** as well as the additional required [field\(s\) you have configured](#).

The fields will be prepopulated with any of the information you entered on the **Find a Prospective Student** page. Click the **Create New** button to create the prospective student account.



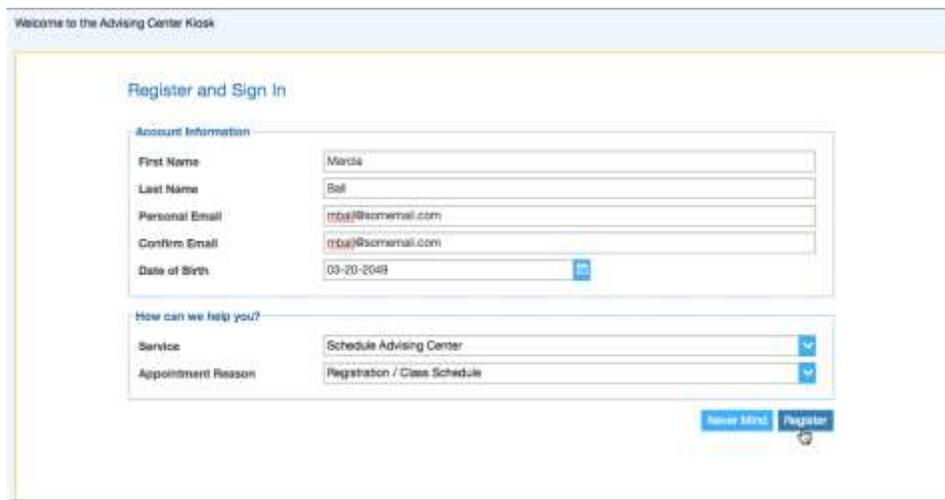
Staff members with permission to view/add prospective students can now take action on this prospective student.

Create a prospective student account (prospective student)

If the Starfish Kiosk is active and [configured to allow prospective students](#), prospective students can create their own account as part of signing in to the Kiosk. The prospective student clicks the “Don’t have a student account?” link on the Kiosk sign in page to create an account.



The prospective student will be prompted to enter the same information as required by a staff user to create an account. Fields will include **First Name**, **Last Name**, **Personal Email** and the additional field(s) selected as part of [configuring prospective students](#) on your system.



The prospective student will also select a **Service** and **Appointment Reason** (available options are based on what has been configured for the kiosk as well as which [appointment types](#) are available to prospective students).

When the prospective student clicks the **Register** button they are put into the waiting room the same as other walk-in students.

The prospective student account and Prospective Student Folder are now available to those with permission to view/create prospective student accounts.

Work with Prospective Students

Schedule an appointment

After electing to [find/create a prospective student](#) on the **Add Appointment** page, and selecting the [Use option](#) to select a prospective student, the steps for setting up an appointment are the same as with students.

A meeting can also be initiated by selecting /creating the prospective student from the *Search for Student* search results, and then selecting the **Add Meeting** option (📅+) from the [Prospective Student Folder](#).

Appointment **Reasons** available will be based on the appointment types available to the role of the person making the appointment and which appointment types have been set up to be used with prospective students.

The screenshot shows the 'Add Appointment' form with the following details:

- Title:** Add Appointment
- Buttons:** Never Mind, Submit
- Tabs:** Scheduling (selected), Outcomes, SpeedNotes
- Calendar:** My Calendar
- With:** People in: Active terms, All terms
- Student:** Partridge, Jimmy
- When:** 05-19-2015, 9:10 AM to 9:30 AM
- Where:** Union Hall
- Reason:** General Advising Wait
- Course:** No Course
- Sharing:** Shared, Private
- Detailed Description:** Enter a detailed description about the appointment. This is viewable by you and the student with whom the appointment is made.
- Permissions:** People with the following roles may be able to see this appointment if they have a relationship with the student(s):
 - Student Services Leadership
 - Academic Support
- Required fields:** (indicated by a red asterisk)
- Buttons:** Never Mind, Submit

As with student appointments, both the provider and student will be emailed the appointment information.

Document outcomes

Meetings with prospective students can be documented on the **Outcomes** tab of the **Add/Edit Appointment** form the same as with student meetings. SpeedNotes can also be used. Outcome notes and SpeedNotes entered for the meeting are available on the [Prospective Student Folder](#).

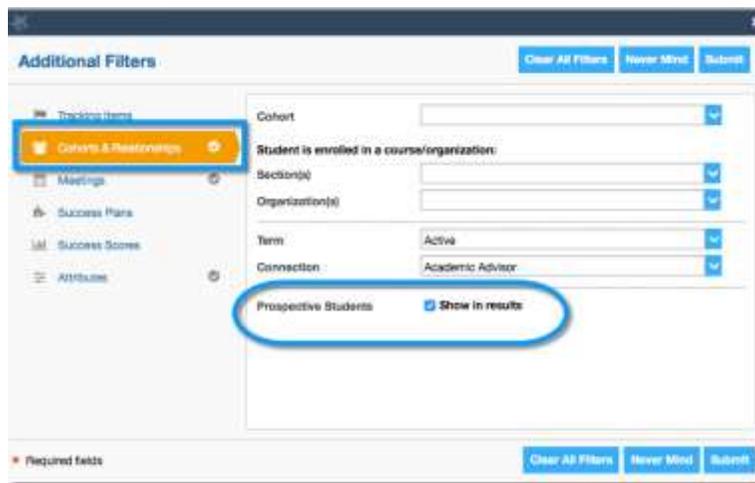
Open the Prospective Student Folder

Once a prospective student account has been created, those with permission to view/create prospective students can open the Prospective Student Folder by selecting the student from one of these locations:

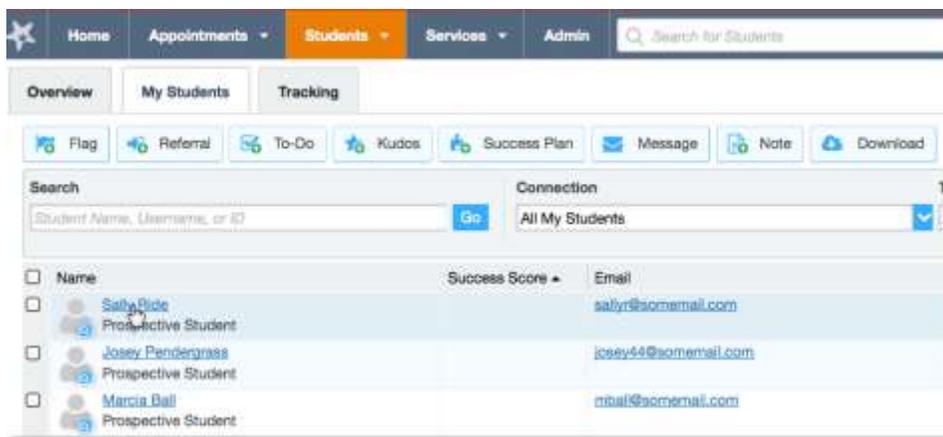
1. From the search results after using the *Search for Students* search box available at the top of any page.



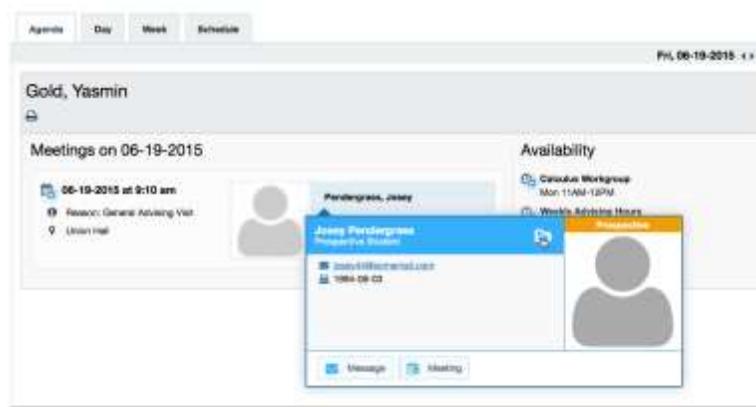
2. From the **My Students** list within the staff user's **Students** area. First select **Additional Filters**, **Cohorts & Relationships** and check the Prospective Students - **Show in Results** checkbox to include prospective students in your student list.



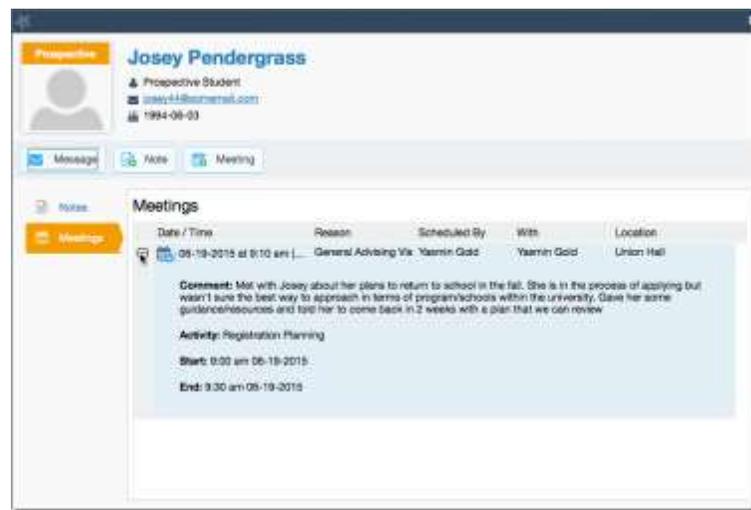
Prospective Students will now be included within you're **My Students** list.



3. **Appointment.** Click on the prospective student's name on an appointment. Appointments may be reached via the **Appointments** or **Recent Changes** channel on the Staff Dashboard, or from within the **Appointments** area as illustrated below).



After you have selected the prospective student via one of the three options listed above, the Prospective Student Folder is opened. It is similar to the Student Folder but has fewer available actions and limited data.

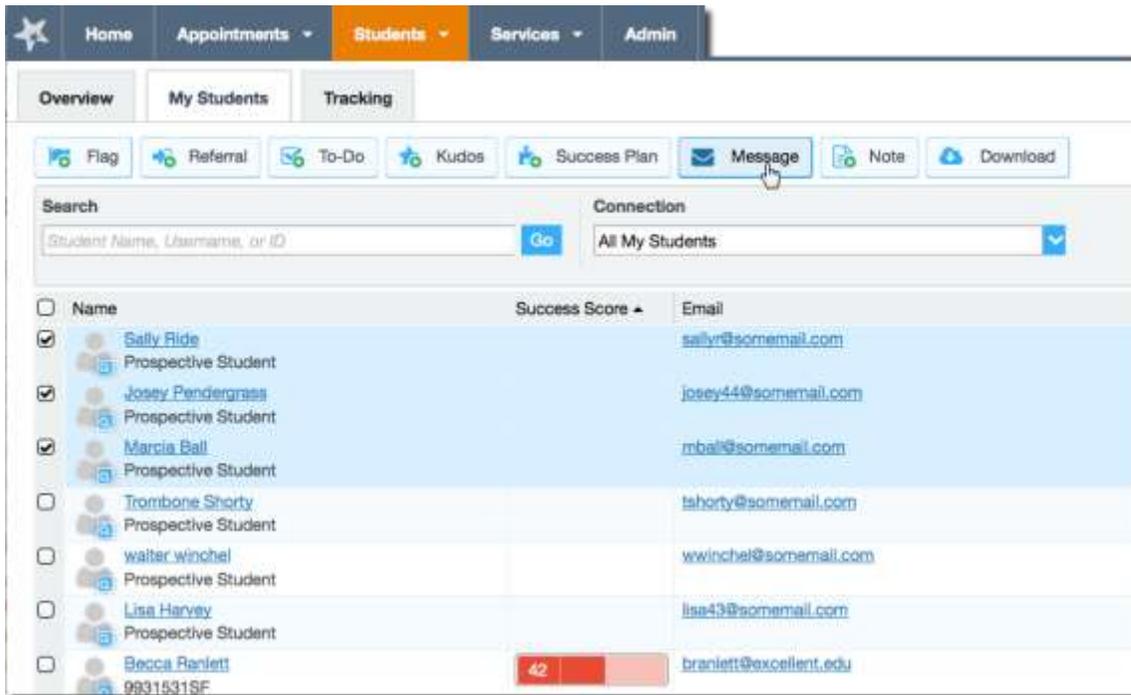


Take action on a prospective student

From the Student Folder, users with permission to view/create prospective students can send an email message, add or review notes and [meeting outcomes](#), or initiate a new meeting ([make an appointment](#)) with the prospective student.

These features work similarly to how they work with students.

These actions can also be taken on multiple prospective students at one time from the **My Students** list if the Additional Filter option to [Show Prospective Students](#) has been checked.

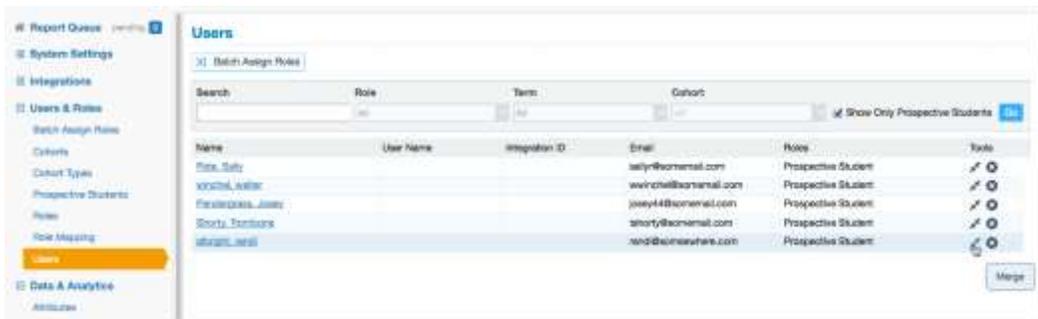


Manage and report on prospective accounts (tenant admin users)

Tenant Admin users have the ability to view and work with prospective student accounts via the **Users** option within the **Users & Roles** section of the **Admin** menu.

Review prospective student accounts

Prospective student accounts are only displayed when the **Show Only Prospective Students** checkbox is checked.



The Tenant Admin user can view the Prospective Student Folder by clicking the hyperlink on the prospective student's name in the list.

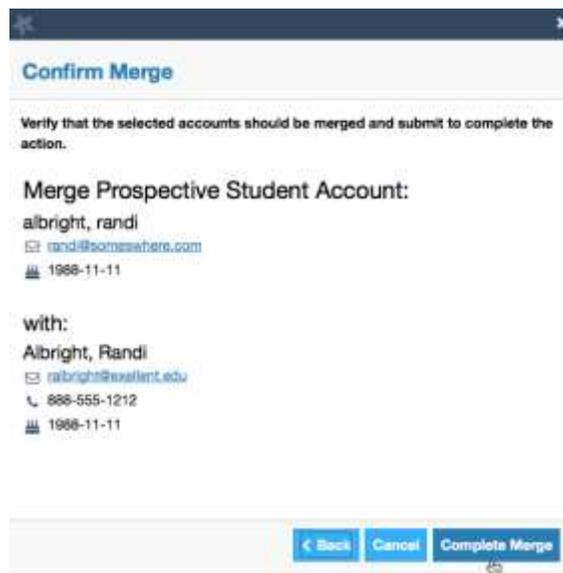
Merge prospective accounts into student accounts

The Tenant Admin user can also merge prospective student accounts into existing student accounts by clicking the **Merge icon** () associated with the desired student. When **Merge** is selected, the **Merge Records** form displays any existing accounts where the first and last name and at least one other field match the information for the prospective student.

If the desired student is listed in the possible matches, the tenant admin selects the student and clicks the **Merge** button.



The system will display the **Confirm Merge** dialog, showing information for the prospective student and the student into which the prospective student's activity will be merged. The user has the opportunity to review information for both accounts before completing the merge.



When the **Complete Merge** button is clicked the prospective student account information (meetings, notes) is merged into the student account and will now be visible on the Student Folder. The prospective student account is no longer available to any users.

Report on prospective student activity

Tenant Admin users can run the **Activity Report** to view information about prospective student accounts and mergers of prospective student and student accounts. Details about prospective student accounts are listed on the **Prospects** tab.

Merged accounts are noted and include the integration id of the student with which the account has been merged.

| | A | B | C | D | E | F | G | H | I |
|----|--------------------|-------------------|-------------------|--------|-----------------------|------------------|--------------|-------------|----------------|
| 1 | Student First Name | Student Last Name | Date Created | Merged | Merged Integration ID | Merged Date | Merged By | Notes Count | Meetings Count |
| 2 | Randi | Albright | 6/4/2015 9:37 AM | yes | 99315395F | 6/4/2015 9:40 AM | Gold, Yasmin | 9 | 12 |
| 3 | Lisa | Harvey | 6/4/2015 9:43 AM | no | | | | 0 | 0 |
| 4 | Josey | Pendergrass | 6/3/2015 10:44 AM | no | | | | 1 | 1 |
| 5 | Sally | Ride | 5/29/2015 7:59 PM | no | | | | 0 | 0 |
| 6 | Trombone | Shorty | 6/3/2015 1:38 PM | no | | | | 0 | 1 |
| 7 | walter | winchel | 5/29/2015 8:02 PM | no | | | | 0 | 1 |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | | | | | | | | | |
| 13 | | | | | | | | | |
| 14 | | | | | | | | | |

Meetings with prospective students are included in the summary counts on the activity report **Activity** tab, and appointments with prospective students are shown on the **Appointments** tab. Prospective students can be identified on the Appointments tab by a “Yes” value in the **Prospective Student** column.

| A | B | C | D | E | F | G | H | I | J | K |
|------------------|--------------------|-------------------|-------------------------------------|------------------------|--------------------|--------------------------------------|--------------------------------|------------------------|---------------------|------------------|
| Appointment Date | Appointment Status | Appointment Owner | Appointment Block Name | Appointment Block Type | Appointment Name | Student ID | Student Integration ID | Student Email | Prospective Student | Appointment Type |
| 6/3/2015 | UPDATED | Gold, Yasmin | Appointment with Pendergrass, Josey | Out of Office Hours | Pendergrass, Josey | 94872474737-4889-9629-635d8943ac2d | 0d3565e9-3c30-48a4-uc13-R996 | jospy4@rocketmail.com | yes | APPOINTMENT |
| 6/3/2015 | CANCELLED | Gold, Yasmin | Appointment with Pendergrass, Josey | Out of Office Hours | Pendergrass, Josey | 94872474737-4889-9629-635d8943ac2d | 0d3565e9-3c30-48a4-uc13-R996 | jospy4@rocketmail.com | yes | APPOINTMENT |
| 6/3/2015 | CANCELLED | Gold, Yasmin | Appointment with Shorty, Trombone | Out of Office Hours | Shorty, Trombone | 44263e82-f2f4-4913-8950-a1a1712a1836 | 308a88a8-888f-421a-018e-50a1f3 | tsnarty@rocketmail.com | yes | APPOINTMENT |

The **Prospective Student** column also appears in the **Meetings** report and the **Notes** report.

Document Version History

| Version | Description of updates | Date of update |
|---------|--|----------------|
| .97 | Prepared for Prospective Student Advising beta | 07/09/15 |
| 1.0 | Feature as released | 10/28/15 |