

Contents

Introduction.....	2
Purpose.....	2
Prerequisites.....	2
Walkthrough Instructions.....	3
Part 1 – Add Activities.....	3
Part 2 – Associate Activities with Appointment Types.....	4
Part 3 – Select activities as part of an appointment/meeting.....	6
Additional Tips and Considerations	7

Introduction

Purpose

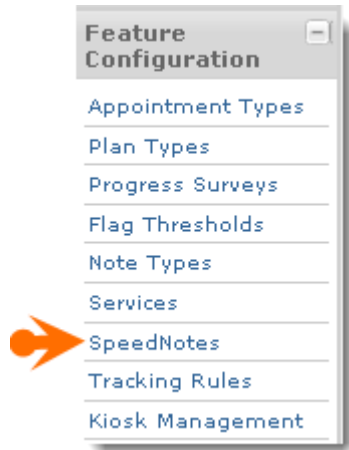
- This document describes the process for setting up your Starfish CONNECT™ software to use the SpeedNotes feature. This feature was released as part of Starfish 3.0 released to Early Availability in December 2012. SpeedNotes allows your institution to set up predefined lists of activities that can be associated with an appointment type, and ‘checked off’ as part of documenting an appointment’s purpose and/or outcomes.

Prerequisites

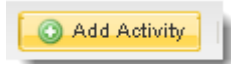
- Appointment Types exist

Walkthrough Instructions

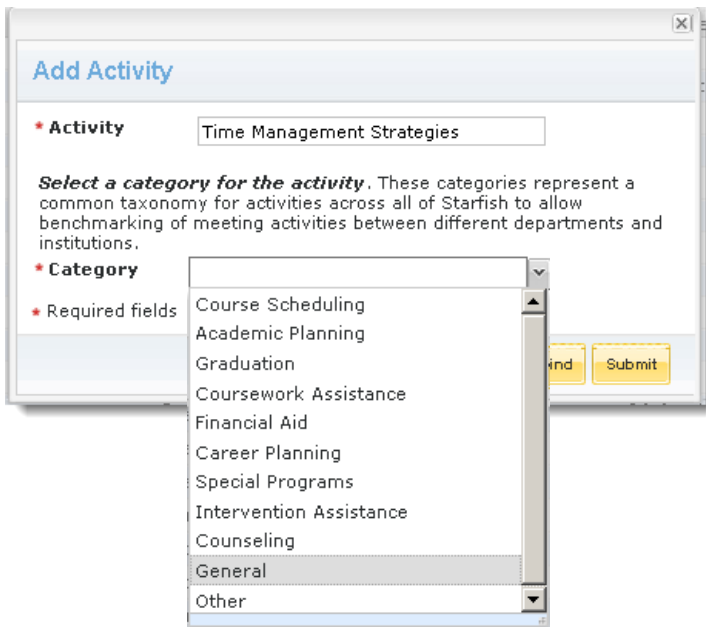
Part 1 – Add Activities



1. Navigate to the Admin Panel of Starfish and select Feature Configuration > SpeedNotes.

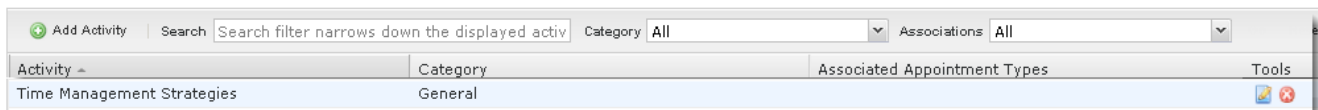


2. Click the 'Add Activity' menu option in the top bar of the 'SpeedNotes Management' Table.

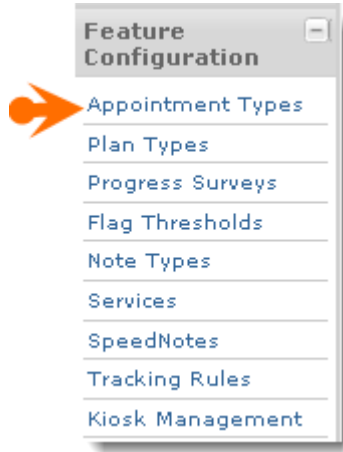


3. In the 'Add Activity' dialog box, provide a name for the activity. Then select a Category from the list provided. Note that the Activity created here will be available to any Appointment Type where you elect to make this Activity available. (mixed use of capitals for Activity here... and then in item 4 below as well)

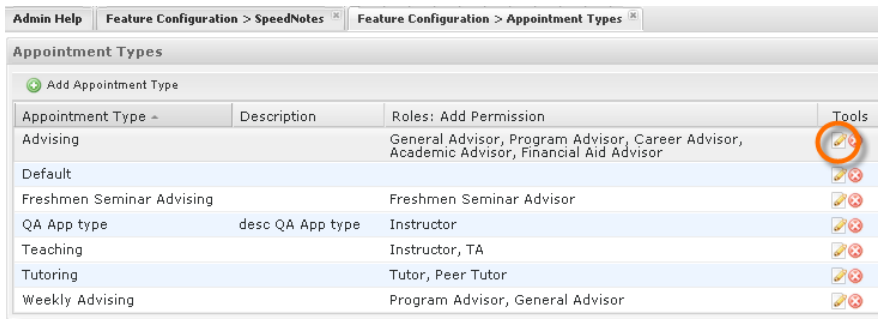
4. Create additional activities using the same steps. You may also edit your activities from the SpeedNotes Management table by clicking the pencil & paper icon to the far right. Once you have associated each activity with an appointment type(s), those will be listed in the "Associated Appointment Types" column.



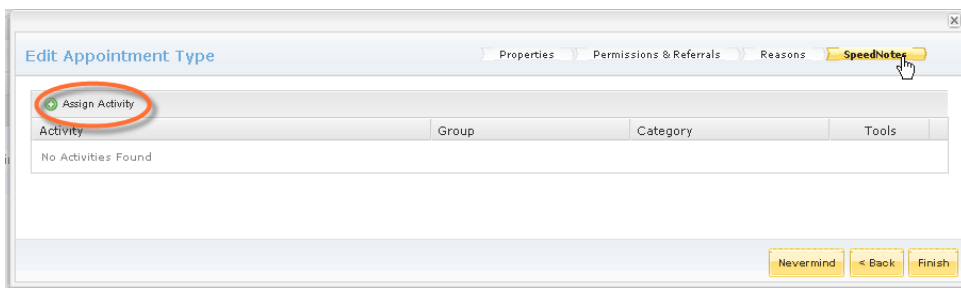
Part 2 – Associate Activities with Appointment Types



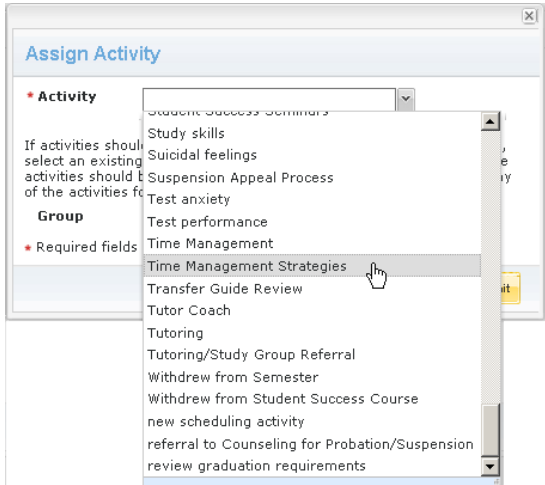
1. Select 'Appointment Types' from the Feature Configuration menu.



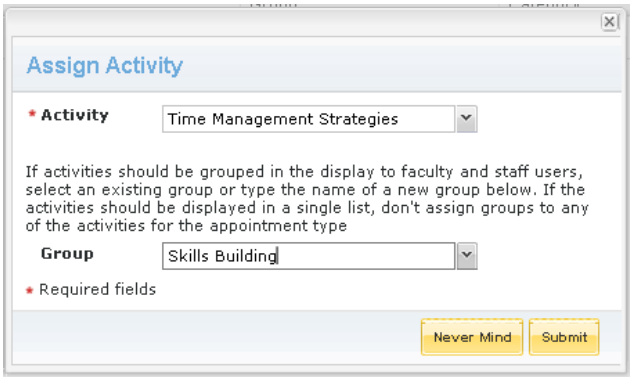
2. Select the pencil & paper (edit) icon to the far right of the Appointment Type to which you want to add Activities.



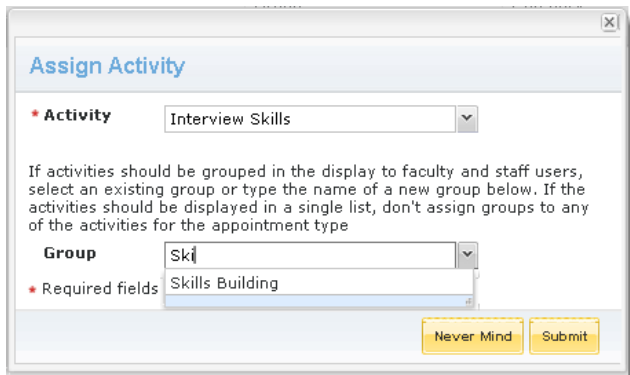
3. Navigate to the 'SpeedNotes' step within the Appointment Type wizard and click the "Assign Activity" icon in the top bar of the Appointment Activity Table.



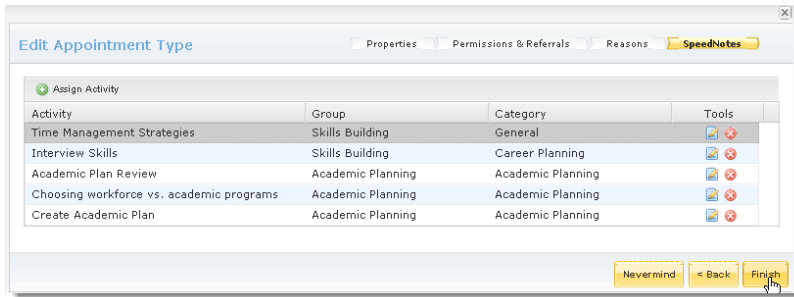
4. Select from your master list the activity that you would like to have associated with this appointment type. (I just find a lot of inconsistency of words that are capitalized in places and not capitalized in others- and I'd like this to be consistent- just don't know which way to go- capitalize everywhere or strip out capitalization- Activity, Activities, Appointment Types..)



5. The Group option allows you to designate an optional categorization that will visually group activities on the SpeedNotes tab of the appointment to make it easier for the user to locate and 'check off' the desired activities. You may type whatever you like for the Group name. Click 'Submit' to assign the selected activity to the appointment type.



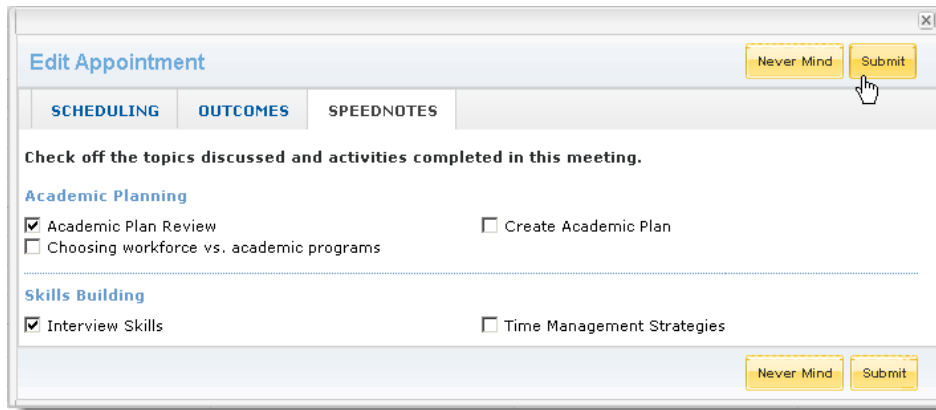
6. Once you have established the group name within an appointment type, when assigning subsequent activities to the same appointment type, if you begin typing an existing group name, the drop down will auto-populate with the existing group name so that you may select it.



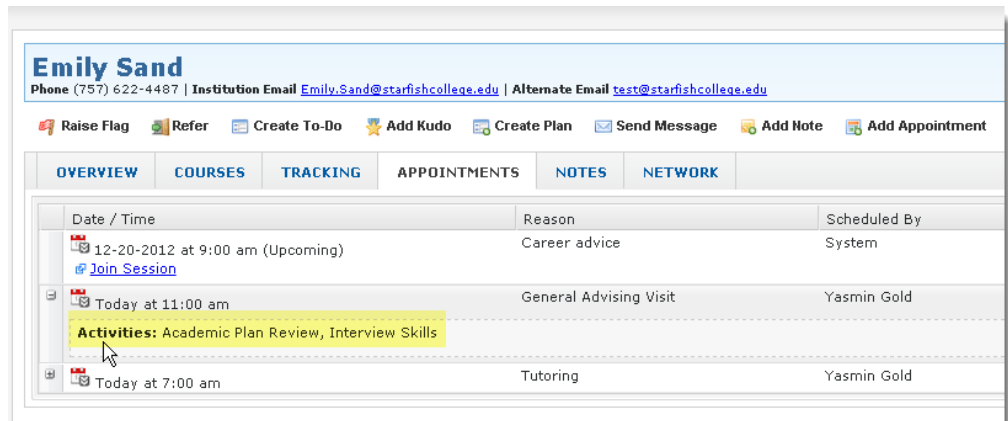
- When you have added all of the desired activities to this appointment type, click 'Finish' in the bottom right corner of the Appointment Activity Table. Repeat these steps to assign the desired activities to each appointment type.

Part 3 – Select activities as part of a meeting

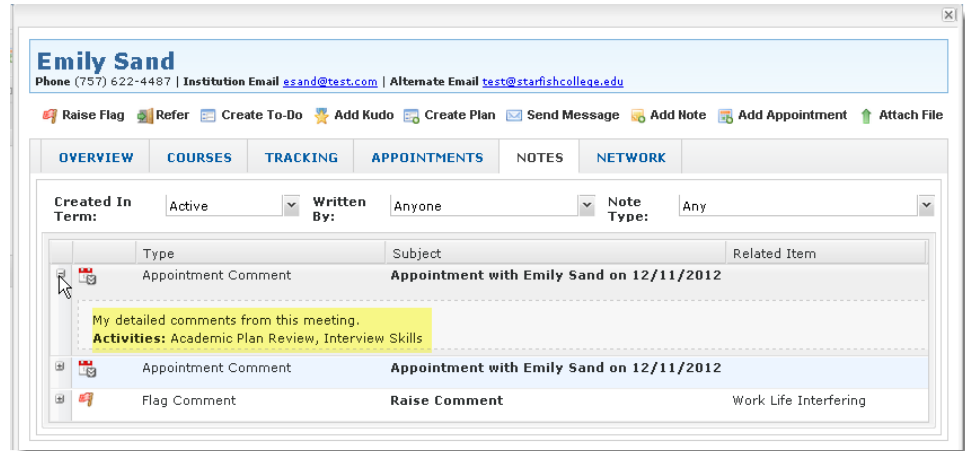
Once the activities have been assigned for an appointment type, a user who has permission to add/edit appointments of that appointment type will see the activities on the SpeedNotes tab of the Appointment, grouped as you directed in your configuration of the SpeedNotes feature.



When SpeedNotes are checked off and submitted, the selected notes will appear as part of the details for that appointment on the Student's Appointments tab.



Activities will also be appended to any Outcomes notes created for the meeting on the Notes tab.



Additional Tips and Considerations

- Activities must first be added to the Master List, and then assigned to an Appointment Type before they will be available. You cannot add Activities to an Appointment Type unless they are on the master list.
- A **Category** must be selected for each activity on your master list.
 - The list of available categories represents a common taxonomy for activities across all of Starfish to allow benchmarking of meeting activities between different departments and institutions. The categories list is not editable. If you feel there is a category missing that is required for your institution, please contact your implementation manager.
 - The category is selected as part of adding the activity to the master list and there is only one category per activity.
- A **Group** is an optional designation for an activity that can be added when the activity is assigned to an appointment type. The group is designed to allow visual grouping of activities.
 - To create your first group, simply type the desired group name in the 'Group' field.
 - Once you have created the group for one activity on an appointment type, if you add another activity to that appointment type and want to use the same group, begin typing the letters, and the drop down will be auto-populated with the group you previously typed.
 - Groups created while assigning activities to one appointment type are not auto-populated as group choices for another appointment type. If you want to use the same group for more than one appointment type, you will add it the same way for each appointment type.
 - An activity from your master list can be designated with a different group for each appointment type where it is included. For example, you could assign the activity 'Update Academic Plan' to a group called 'Academic Planning' for the 'General Advising' appointment type, and then assign that same activity to a group called 'Change of Major' for the 'Career Advising' appointment type.
- If a user is not seeing the expected SpeedNote options; remember that SpeedNotes are associated with an Appointment Type. Appointment Types do not directly appear to the user when making the appointment, but will be driven by the user's role, relationships to the student, and the reason selected for the appointment.