

Progress Survey Outreach: Red & Yellow Flags

Updated 10/7/26

This guide explains how to identify students who received a Red or Yellow Progress Survey flag and need outreach from our Student Success Team. Follow the steps below to filter the appropriate students and raise the correct Starfish To Do item.

Note: Be sure to clear all filters before creating a new filter.

1 Filter for Students Needing Outreach

From the **Students** link, select the **My Students** tab. Use the filters below to identify students who received a Red or Yellow Progress Survey flag.

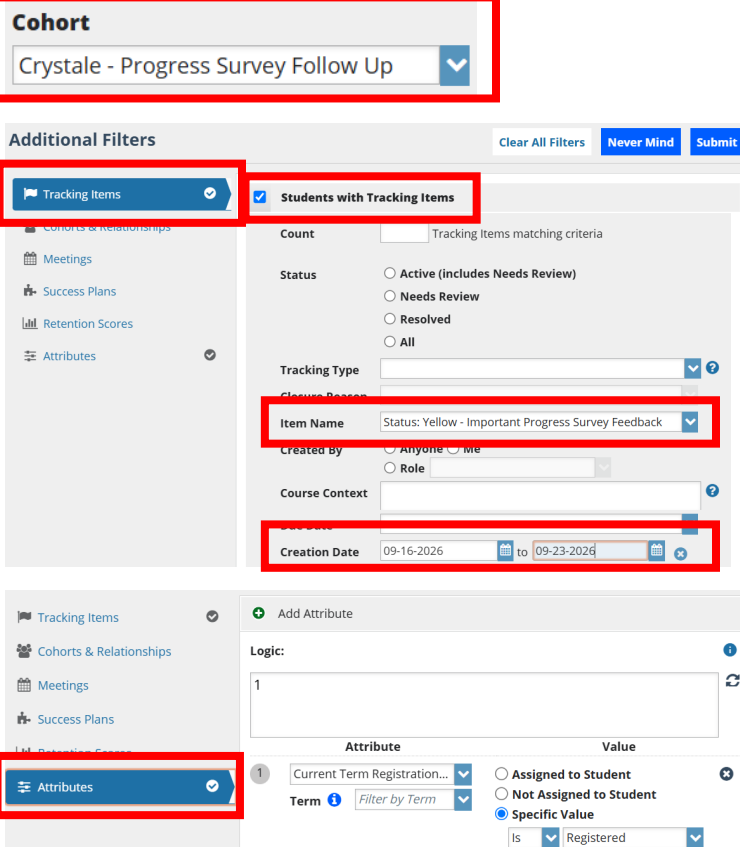
From the **Cohort** drop-down, select **your cohort of students**.

Tracking Items Filter

- Click **Tracking Items**
- Check **Students with Tracking Items**
- Item Name: Select the appropriate **Yellow or Red Progress Survey Feedback** item
- **Creation Date:** Enter the **Progress Survey Date range**
- Leave all other fields blank

Attributes Filter

- Click **Attributes** (bottom link)
- Click **Add Attributes**
- Select **Current Term Registration Status**
- **Term** stays blank
- Select **Specific Value**
- Select **Current Term Registration Status**
- Click **Submit**



Cohort
Crystale - Progress Survey Follow Up

Additional Filters Clear All Filters Never Mind Submit

Tracking Items Students with Tracking Items

Count Tracking Items matching criteria

Status
☐ Active (includes Needs Review)
☐ Needs Review
☐ Resolved
☐ All

Tracking Type

Item Name Status: Yellow - Important Progress Survey Feedback

Created By ☐ Anyone ☐ Me
☐ Role

Course Context

Creation Date 09-16-2026 to 09-23-2026

Attributes

Add Attribute

Logic:
1

Attribute	Value
Current Term Registration...	☐ Assigned to Student ☐ Not Assigned to Student ☒ Specific Value
Term	Filter by Term
Is	Registered

2 Raise the To Do Item

Once the filtered list appears, **select all students** who need outreach and click **To-Do**.

From the **To-Do** drop-down, select the appropriate To-Do:

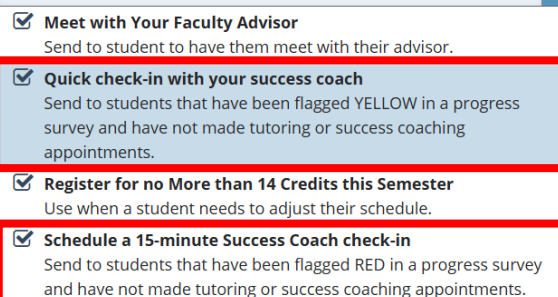
- **RED:** Schedule a 15-minute Success Coach check-in
- **YELLOW:** Quick check-in with your Success Coach

Important: Be sure the To-Do selected matches the Progress Survey status used to filter your students.

To-Do

Course Context

Comment



☒ **Meet with Your Faculty Advisor**
Send to student to have them meet with their advisor.

☒ **Quick check-in with your success coach**
Send to students that have been flagged YELLOW in a progress survey and have not made tutoring or success coaching appointments.

☒ **Register for no More than 14 Credits this Semester**
Use when a student needs to adjust their schedule.

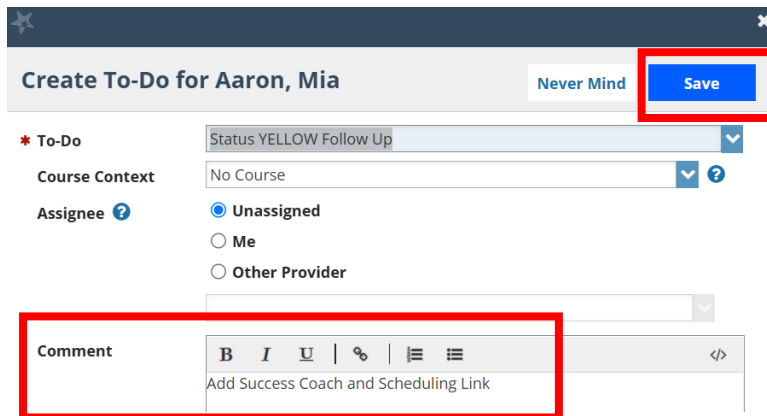
☒ **Schedule a 15-minute Success Coach check-in**
Send to students that have been flagged RED in a progress survey and have not made tutoring or success coaching appointments.



3 Add Your Contact Information

In the **Comment** box, delete “Add Success Coach and Scheduling Link.” Enter your **name and scheduling link**, then click **Save**.

Your name and scheduling link will be included in the PennWest email sent to the student. The To-Do will also be saved in the student’s Starfish folder and will appear in their **Messages** and on their **Dashboard**.



4 What the Student Sees

RED

To-Do: Schedule a 15-minute Success Coach check-in

Email Subject: Midterms are almost here: Let’s make a plan

The student is encouraged to schedule a 15-minute Success Coach check-in **by (Date)**.

YELLOW

To-Do: Quick check-in with your Success Coach

Email Subject: Midterms are coming: time for a quick check-in?

The student is encouraged to schedule a 15-minute Success Coach check-in **within the next week**.

5 Manage the To-Do

Hover over the check mark next to the To-Do to open the To-Do details.

- Click **Comment** to add an update or document additional outreach.
- When the student schedules an appointment, click **Resolve** and select the appropriate **reason for clearing the To-Do**.

Comments provide a record of additional outreach, while the reason selected when resolving the To-Do supports **outreach reporting**.

