Kiosk and Waiting Room Management Overview

The Kiosk feature is part of Starfish Connect and assumes a physical location where students come to sign in for an appointment. Faculty and staff will take meetings with those students from the Kiosk Waiting Room.

Users can access and manage the Kiosk and Waiting Room through the following workflows:

- Front Desk Personnel launch the kiosk.
- Students sign in to the Kiosk for:
  - Walk-in appointments
  - Scheduled appointments
  - Prospective Students
  - Checking the Wait time
- Service members meet with students and manage the Waiting Room queue.

Launch the Kiosk

At the beginning of each day, Kiosk front desk personnel should plan to launch the kiosk on the dedicated computer your center is using for students to check in.

1. Open your browser (Internet Explorer version 10 or higher for swipe card integration) and enter the Kiosk URL provided to you by your Starfish Administrator.
2. Select the Kiosk you plan to launch from the drop down menu, and enter the password given.
3. You will see your center’s Kiosk sign-in page.
4. Students will see this page and will sign in to be entered into the Waiting Room queue.
Students Sign in to the Kiosk

Once you have launched the Kiosk, a student will enter and sign in at the dedicated Kiosk computer. Students will follow a series of prompts to sign in to the kiosk. Subsequent prompts will vary based on their answers to the initial prompts. Students will be prompted to:

- Sign in for a scheduled appointment
- Sign in for a walk-in meeting
- Check their status in the Waiting Room queue

While navigating the Kiosk, students can select the **Back** and **Start Over** buttons at the bottom of the page to facilitate the login process.

If a student remains on any of the kiosk login screens for too long, a notice will pop-up asking if they need more time or do not wish to continue.

Login to the Kiosk

Regardless of the workflow choices that the student makes when signing in to the Kiosk, students will be prompted to enter their student ID and last name when signing in. Students do not have to put in their last name.
Sign in for a Scheduled Appointment

Students with a scheduled appointment can sign in for that appointment through the kiosk as follows:
1. Select **I have an appointment** on the first page of the kiosk login screen.
2. Log in to the kiosk.
3. The kiosk will ask the student to confirm the appointment by stating both the time of the scheduled appointment and the person with whom the student is meeting, including that service provider's profile picture if available.
4. Select **Yes** to sign in to the appointment.
5. Select **No** to proceed with the Walk-In Meeting workflow.
6. The student will see a confirmation page, and after a few seconds, the page will automatically refresh itself.

Sign in for a Walk-in Meeting

Students without a scheduled appointment can sign in for a walk-in meeting as follows:
1. Select **I don't have an appointment** on the first page of the kiosk login screen.
2. Log in to the Kiosk.
3. Select the Service for the meeting.
   - For example, if a Kiosk is used for both the Advising and Financial Aid Services, the student will be prompted to choose one of those Services for the meeting.
   - If Group Sessions are available with members of the Service, those will also be included in the list of Services for the student to choose from.
   - The Kiosk will skip this step if only one Service is linked to the Kiosk.
4. Select a reason for the meeting.
   - The reasons presented to the student are generated from the reasons associated with the appointment type for that kiosk's service.
   - If the student chooses to sign in for a Group Session, the available Group Sessions will be displayed here instead.
5. Choose a course associated with the meeting, if applicable.
   If the meeting is not related to a course, the student can select No Course.
6. Provide additional details about the meeting, if desired.
   Students can select **Skip this step** if they do not wish to add detailed information about the meeting, or they can add details and then select **Save and Continue**.
7. The student will see a confirmation page, and after a few seconds, the page will automatically refresh itself.
Check Status in the Waiting Room Queue

Students can check their status in the Waiting Room at any time for information about how many students are waiting ahead of them in the Waiting Room queue.

**Students can check status as follows:**

1. Select **I want to check the wait time** on the first page of the kiosk login screen.
2. Log in to the Kiosk.
3. If the student is not already signed in to the Kiosk, the student will be prompted to do so, using the Walk-in Meeting workflow from that point forward.
4. If the student is already signed in to the Kiosk, the Kiosk will display the number of students ahead in the Waiting Room queue and the longest wait time.

   The student will be asked if he or she wishes to continue waiting.
   - Select Yes to continue waiting. The student will see a confirmation page, and after a few seconds, the page will automatically refresh itself.
   - Select No to stop waiting.
     1. The Kiosk will ask the student again to confirm that they no longer wish to continue waiting.
        - Select **No, I want to keep waiting** to continue waiting.
        - Select **Yes, Take me off the list** to be removed from the Waiting Room queue.
     2. The student will see a confirmation page, and after a few seconds, the page will automatically refresh.
Manage the Waiting Room Queue and Take Walk-In Meetings

As students log into the Kiosk, the Waiting Room queue will populate. Front desk personnel and other staff members associated with the kiosk, can view the Waiting Room queue.

View and Access the Waiting Room Queue

1. Login to Starfish on your own computer (not on the computer dedicated to the Kiosk sign-in page).
2. Locate the My Services channel on your homepage and click the Waiting Room link for a given service.
3. If you have access to view more than one Waiting Room, you will see a drop down menu. You may view more than one queue at the same time by checking off multiple boxes from this menu.

As a member of the Service and one with relationships to students signing in to the Kiosk, you will be able to take certain actions, such as:

- Viewing students in the Waiting Room queue
- Taking Meetings with students from the Waiting Room queue

View Details About Students in the Waiting Room Queue

For each student in the Waiting Room queue, you can click on the student’s name to view their student folder.

When students sign in to the kiosk, they have the option to provide details about what they want to discuss. These notes can be edited from within the Waiting Room queue.

- You may select Add a description to add notes about the student's reason for meeting, if they student has not already provided this information.
- You may select Edit to edit or add additional notes to the student's original description.

This will update the description seen by the other service members who access the Waiting Room. (For example, you can clarify more about what the student needs if you learn additional details after a brief discussion.)
Take Meetings With Students from the Waiting Room Queue

1. Meet with a student for a walk-in appointment.
   Click Start Meeting to remove the student from queue and begin a meeting.
   - Starting a meeting with a student will remove that student from the queue so that other service members do not also try to meet with that same student.
   - If you do not have a meeting block established, Starfish will create a walk-in block for the meeting.
   - If you have a "scheduled appointments only" block set, you will not be able to save the meeting without changing the time of the meeting or the appointment types allowed.

2. Meet with students for a scheduled appointment.
   - On the right side of the Waiting Room you will see a list of today’s appointments. When a student who has an appointment with you today signs into the Kiosk, you will see an indicator that the student is now waiting to be seen.
   - Click Start Appointment to remove the student from queue and begin your meeting.

3. When you click to start a meeting, an Add Appointment pop-up will overlay the Waiting Room on your screen.

4. Select the Outcomes tab to document your meeting.

5. The "Actual Start Time" will populate based on the time you clicked to start the meeting. Make sure to enter the "Actual End Time" before you submit this pop-up.

6. You have the option to add free-text comments on the Outcomes Tab, and/or to send a copy of your comments to the student.

7. If available, click the SpeedNotes tab to quickly document the outcomes of your meeting if applicable. Then click Submit.

8. If you decide that you cannot take the meeting, click Never Mind. You will be prompted to confirm that you do not want to save what you have entered and that you understand that this student will be sent back to the queue. Choose Yes or No.

9. After clicking Submit you will see the Waiting Room queue and are ready to start your next meeting.

10. Select Student Left if the student left before meeting with anyone.
Kiosk Reporting

Starfish recommends running the Services Report to extract data about the Kiosk and Waiting Room.

1. Navigate to Starfish Admin > Reports.
2. Select the Services Report from the reports menu on the left.
3. Select the Term and Service for which you would like to generate a report. Be sure to select the Service associated with your Kiosk.
4. Click Generate Report.
5. Reports will display in the report queue as they process, and when the report is ready, a download link will appear on the right.
6. Click the download report icon to open the report in Microsoft Excel.

The report will include all appointment information for the Service based on the Appointment Type linked to that Service and the members of that Service.
Kiosk Access for Prospective Students

Students without a Student ID will be able to click a link that says: "No Student ID? Not a problem. Sign in here." After selecting this option, the student will enter the required Prospective Student information to create an account before proceeding with the kiosk login process and be added to the Waiting Room queue.

Create Prospective Student Accounts

Prospective Student user accounts can be created by faculty and staff whose roles have permission to create prospective student accounts. 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.

Faculty/Staff Created Accounts:

1. Create accounts from the My Students tab
   - Before creating a new prospective student account from the My Students tab in Starfish, verify that an account for that student does not already exist as follows:
     1. Search for the student in the "Search for Students" search box in the top navigational bar in Starfish. Any existing prospective students that match your criteria will be included in the search results and labeled as “Prospective Student.”
     2. Click the name of an existing prospective student within the search results to open the Prospective Student Folder. If you find the student this way, you do not need to create an account.
     3. If no account exists for that student yet, you will see a message indicating "No people found" and may continue the process of creating a prospective student account.
   - To ensure that multiple accounts are not created for the same student, you will be required to enter additional search criteria to further verify that there is not a matching prospective student account.
   - 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. Click this button to create a prospective student account.
   - 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) configured for your institution.
   - The fields will be pre-populated 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.
2. Create accounts from the Add Appointment form

1. Click the Find/Create Prospective Student icon under the Student drop-down menu on the Scheduling tab of the Add Appointment dialog.
   - Prospective student accounts will only be included in the Student drop-down menu when the Find/Create Prospective Student icon has been selected.
2. 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).
3. 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. Click this button to create a prospective student account.
4. 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 pre-populated with any of the information you entered on the Find a Prospective Student page.
5. Click the Create New button to create the prospective student account.

3. Kiosk: Student Created Accounts

Prospective students can create accounts at the Kiosk as follows:

1. Access the Kiosk and select either "I have an appointment" or "I don't have an appointment."
2. Click the "No Student ID? No problem. Sign in here" link at the bottom of the Kiosk sign in page to create an account.
3. Enter basic information including First Name, Last Name, Personal Email and the additional field(s) selected as part of configuring prospective students on your system.
4. Click Next to create the account and proceed with signing into the Kiosk.
5. When presented with the kiosk greeting text to verify that the student wants to enter the queue:
   - Click Yes to proceed through the typical Kiosk walk-in workflow, selecting the Service and Appointment Reason.
   - Click No to exit the Kiosk. The prospective student account will have been created, even if the student does not choose to enter the waiting room queue in the Kiosk.
6. Enter any comments and click Save and Continue to be entered into the waiting room queue.

Faculty and staff with permission to work with prospective students will now be able to find this student in Starfish and work with the account.
Work With Prospective Students

Starfish’s Prospective Student Advising feature makes it possible to document notes and meeting outcomes with prospective students. Users whose roles have permission to merge prospective student accounts into imported students’ accounts will be able to merge prospective student accounts with imported student accounts once the prospective student enrolls at the institution and becomes an active Starfish student user.

If you search for, but cannot find, a prospective student, their account may still need to be created.

Interact with Prospective Students

Depending on your role permissions in Starfish, you may be able to work with prospective student accounts in the following ways:

Access the Prospective Student Folder

Users whose roles have permission to view/create prospective student accounts can access their student folders from one of the following locations:

- From the Search for Students area at the top of the page:
  Access the Student Folders for prospective students via the search results after using the Search for Students search box available at the top of any page.
- From the My Students list:
  From within Students > My Students, click Additional Filters to include prospective students in your student list.

![Additional Filters](image)

Prospective Students will now be included within your My Students list. Access their student folders by clicking the prospective student's name, displayed as a hyperlink.

- From a prospective student appointment:
  Access the Student Folders for prospective students by clicking on the prospective student’s name on an appointment. Appointments may be reached from the Home page via the Appointments or Recent Changes channel or from within the Appointments tab.

The Prospective Student Folder 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
- Make an appointment with the prospective student.

These features work similarly to how they work with other 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 in results** has been checked.

**Schedule an Appointment**

A meeting can also be initiated by selecting /creating the prospective student account 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.

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

Meetings with prospective students can be documented on the Outcomes tab of the **Add/Edit Appointment** dialog. SpeedNotes can also be used. Outcome notes and SpeedNotes entered for the meeting are available on the Prospective Student Folder.
Manually merge prospective accounts into student accounts

Users whose roles have permission to merge prospective student accounts into existing student accounts will see a Merge button displayed in the Student folder.

To manually merge a prospective student account with an imported student account:

1. Click **Merge** to access the Merge Records dialog, which displays any existing accounts where the first and last name and at least one other field match the information for the prospective student.
2. If the desired student is listed in the possible matches, click the **Merge** button beside that student.
3. This opens the **Confirm Merge** dialog, showing additional information for the prospective student and the student into which the prospective student account will be merged.
4. After verifying that the accounts should be merged, click **Complete Merge** to merge the prospective student account activity (meetings, notes) into the imported student record. That activity is now visible on the student's folder, and the prospective student account is no longer available to users.

Merging can also be configured to occur automatically with data imports or by Starfish administrators.