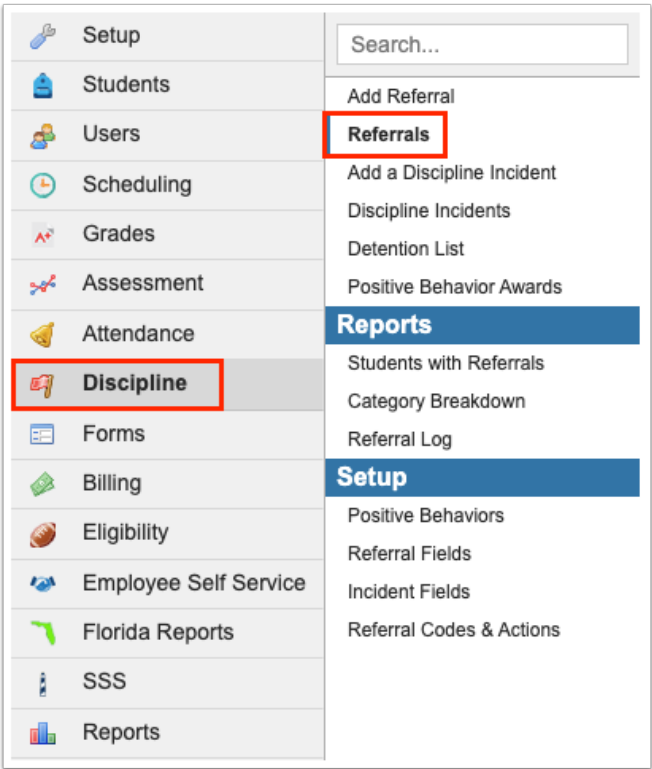


# Referrals


The Referrals screen is used to view referrals submitted by teachers or administrators. From this screen, administrators can process referrals, add victim entries, add action entries, merge referrals, duplicate referrals, view student documentation, print discipline letters, print referrals, and delete referrals.

## Viewing and Editing a Referral

1. In the **Discipline** menu, click **Referrals**.



2. On the Search Screen, enter search criteria to locate an individual student or group of students and click **Search**.

 See [Searching for Students](#) for detailed instructions on the various ways to search for students.

Search ScreenSimple List

Q Student SearchMore Search Options

Student Group

▼

☐ Search All Schools

☐ Include Inactive  
☐ Previous Years  
☐ Use Most Recent Enrollment

Use Legacy Search

Search

A list of referrals matching the search criteria is displayed. Scroll to the right to view the referral form fields.

**i** The number of referrals returned in the search is controlled by the system preference "Limit the results displayed when searching for Referrals" in Setup > System Preferences > Default System Preferences > [General](#) tab.

Search ScreenSimple List

☐ Show Referrals From All Schools
 ☐ Include Inactive
 ☐ All Years
 ☐ Minor Infractions
 ☒ Closed Referrals
 

Save

Prev

Page 1 / 2

Next

35 Records

Export

Filter: OFF

Toggle Columns

Page Size: 20

Student	Student ID	Grade	Reporter	Incident Date	Submission Date	Processed	Teacher Code	Primary Discipline Code	Incident	Action(s)	Action/Disposition
Abe, Charlie Noel	00055879	10	Weiss, Ashley	10/16/2023	10/16/2023 9:01 am	Processed		Profanity (Using)		Detention	
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:48 pm	Returned	Class Cut...	Violation (School Rules)			
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:46 pm	Closed	Class Cut...				
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:42 pm		Class Cut...				
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	06/30/2023	06/30/2023 9:49 am		Abusive ...				
Abe, Charlie Noel	00055879	10	Garcia, Lizette	06/30/2023	06/30/2023 9:20 am			Disrespectful			
Abe, Charlie Noel	00055879	10	Garcia, Lizette	06/05/2023	06/05/2023 10:18 am	Processed	Profanity ...	Disrespectful			
Abregan, Kenna Joy	00061843	10	Weiss, Ashley	10/17/2023	10/17/2023 7:45 am	Processed		Disruption Lesser/Disorderly Conduct		Detention (1)	
Acevedo, Diem Donna	00023057	09	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:48 pm		Class Cut...	Violation (School Rules)			
Acevedo, Diem Donna	00023057	09	Roxy, Frida Lizette	06/30/2023	06/30/2023 9:17 am		Abusive ...				
Acosta, Dexter D	00086685	10	Weiss, Ashley	08/28/2023	08/28/2023 9:07 am	Processed		Leaving School Grounds			
Acosta, Dexter D	00086685	10	Weiss, Ashley	09/16/2022	09/16/2022 11:35 am			Disrespectful			
Acosta, Dexter D	00086685	10	Roxy, Frida Lizette	08/19/2022	08/25/2022 1:48 pm	Processed	Profanity ...	Profanity (Using)		Detention (2)	Detention [D]
Acosta, Harry P	00058780	10	Weiss, Ashley	10/16/2023	10/16/2023 9:22 am	Processed		Inappropriate Behavior		Detention (1)	
Acosta, Harry P	00058780	10	Weiss, Ashley	10/27/2022	10/11/2023 9:51 am			Drugs Use/Possession (SESIR)	78207		
Aguilar, Emily Dickinson	00022481	12	Weiss, Ashley	10/11/2023	10/16/2023 9:26 am	Processed		Fighting Lesser/Physical Aggression		Detention (1)	
Aguilar, Emily Dickinson	00022481	12	Weiss, Ashley	08/25/2023	08/28/2023 12:34 pm			Bullying(SESIR)	78205		

**💡** To customize the columns that display in the referrals list, click **Toggle Columns**. In the pop-up window, deselect a column to remove it from the referrals list, and then close the pop-up window.

X

Toggle Columns

☒ Student
 ☒ Student ID
 ☒ Grade
 ☒ School
 ☒ Year
 ☒ Reporter
 ☒ Incident Date
 ☒ Submission Date
 ☒ Processed
 ☒ Primary Discipline Code
 ☒ Incident
 ☒ Action(s)
 ☒ Action/Disposition Code
 ☒ Action Taken By
 ☒ Bus Number
 ☒ Context
 ☒ Incident ID
 ☒ Involved in Hate Crime
 ☒ Refer Date
 ☒ Suspension Length (Hours)
 ☒ Time of Day Incident Occurred
 ☒ Suspension Length (Days)
 ☒ Other Discipline Code(s)
 ☒ Zero-Tolerance:Expulsion
 ☒ School-Related Arrests

3. To edit a field, click the field and make the desired change.

The field turns yellow to indicate a change has been made.

4. Click **Save**.

**i** Users must have profile permissions to edit referrals in order to make changes to referral form fields from this screen.

Search Screen Simple List

☐ Show Referrals From All Schools
 ☐ Include Inactive
 ☐ All Years
 ☐ Minor Infractions
 ☒ Closed Referrals

Prev

Page 1 / 2

Next

35 Records

Export

Filter: OFF

Toggle Columns

Page Size: 20

Save

Student	Student ID	Grade	Others Involved	Parent Contact	Problem Behavior	Processed	Date of Parent Contact	School Number, Where Discipline/Resultant Action Occurred	Hope Event	Threat Assessment Ev
Abe, Charlie Noel	00055879	10	Phone							
Abe, Charlie Noel	00055879	10	Email							
Abe, Charlie Noel	00055879	10	Letter							
Abe, Charlie Noel	00055879	10	Letter							

5. Select **Show Referrals From All schools** to display referrals from all schools that meet your search criteria.

6. Select **Include Inactive** to include inactive students in the list of referrals.

7. Select **All Years** to display referrals from all school years that meet your search criteria.

Referrals

Page 3

- i** The profile permissions "View Referrals From Other Schools," "View Referrals From All Years," and "View Referrals For Inactive Students" must be enabled for the Referrals screen in Users > [Profiles](#) for the "Show Referrals From All Schools," "All Years," and "Include Inactive" options to be available for selection.

When "Show Referrals From All Schools" is selected, the School column is added to the screen and displays the school that assigned the referral. The profile permission "Edit Referrals From Other Schools" is required in order to edit a referral from another school.

When "All Years" is selected, the Year column is added to the screen and displays the school year of the referral.

**8. Select **Minor Infractions**** to view referrals that were marked with "Minor Infraction - No administrative action needed."

- i** The system preference "Enable Minor Infractions" must be enabled in Setup > [System Preferences](#) > [General tab](#) in order to use the minor infractions functionality.

**9. The **Closed Referrals** check box is selected by default, and when selected includes referrals that were closed by an administrator without processing. Deselect the check box to exclude closed referrals.**

- i** The "Closed Referrals" check box will only display if the system preference "Alert Teachers when a Referral is Closed" is enabled in Setup > System Preferences > General tab.

Search Screen Simple List

☐ Show Referrals From All Schools ☐ Include Inactive ☐ All Years ☐ Minor Infractions ☒ Closed Referrals Save

Prev Page 1 / 2 Next 35 Records Export Filter: OFF Toggle Columns Page Size: 20

Student	Student ID	Grade	Reporter	Incident Date	Submission Date	Processed	Teacher Code	Primary Discipline Code	Incident	Action(s)	Action/Disposal
Abe, Charlie Noel	00055879	10	Weiss, Ashley	10/16/2023	10/16/2023 9:01 am	Processed		Profanity (Using)		Detention	
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:48 pm	Returned	Class Cut...	Violation (School Rules)			
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:46 pm	Closed	Class Cut...				
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:42 pm		Class Cut...				
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	06/30/2023	06/30/2023 9:49 am		Abusive ...				
Abe, Charlie Noel	00055879	10	Garcia, Lizette	06/30/2023	06/30/2023 9:20 am			Disrespectful			
Abe, Charlie Noel	00055879	10	Garcia, Lizette	06/05/2023	06/05/2023 10:18 am	Processed	Profanity ...	Disrespectful			

**10. Click the student link to open the referral.**

**11.** Once the referral is opened, make any additions or edits to the referral fields as needed. Click **Save** when finished.

If you have view access to Discipline > [Discipline Incidents](#), the incident ID will be a link that will take you to the discipline incident. If you do not have view access to Discipline > [Discipline Incidents](#), the incident ID will display but will not be a link. Only teachers and administrators will see the incident ID number.

Search Screen

Simple List

☐ Show Referrals from All Schools
 ☐ Include Inactive
 ☐ All Years
 ☐ Minor Infractions
 ☒ Closed Referrals

Save

◀ Prev

Page: 1 / 2

Next ▶

35 Records


Export

Filters: OFF

Toggle Columns











Page Size: 20



Student	Student ID	Grade	Reporter	Incident Date	Submission Date	Processed	Teacher Code	Primary Discipline Code	Incident	Action(s)	Action/Disposi
Bahena, Carl	00086055	09	Weiss, Ashley	10/11/2023	10/11/2023 11:03 am		Bullying(SESIR)	78211			
Allegory, Potter Ron	00059241	11	Weiss, Ashley	10/26/2022	10/11/2023 10:21 am		Bullying(SESIR)	78209			
Acosta, Harry P	00058780	10	Weiss, Ashley	10/27/2022	10/11/2023 9:51 am		Drugs Use/Possession (SESIR)	78207			
Aguilar, Emily Dickinson	00022481	12	Weiss, Ashley	08/25/2023	08/28/2023 12:34 pm		Bullying(SESIR)	78205			
Aguilar, Emily Dickinson	00022481	12	Weiss, Ashley	08/28/2023	08/28/2023 11:46 am		Alcohol Use/Possession/Sale(SESIR)	78204, 78206			
Breaux, William Hampton	00024327	09	Weiss, Ashley	10/11/2022	10/11/2022 2:58 pm		Threat/Intimidation (SESIR)	78201			
Abe, Charlie Noel	00055879	10	Weiss, Ashley	10/16/2023	10/16/2023 9:01 am	Processed	Profanity (Using)			Detention	
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:48 pm	Returned	Class Cut...	Violation (School Rules)			
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:46 pm	Closed	Class Cut...				
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:42 pm		Class Cut...				



 If two or more referrals have been merged, "Parent of X Referral(s)" displays at the top of the parent referral. See [Merging Referrals](#) for more information.


Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

   Parent of 2 Referral(s)  Print a Form/Letter  Save     

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	 Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	

Action/Disposition Code	
Action Taken By	
Bus Number	
Context	
Incident ID	10000194
Involved in Hate Crime	<input type="radio"/> N/A <input type="radio"/> No <input type="radio"/> Yes

 Fields with a question mark icon have a description. Hover the mouse over the icon to view the description. Fields with a link icon have a link to a website. Click the icon to open the website in a new tab or window. Field descriptions and links are set up in Discipline > [Referral Fields](#).

zero-tolerance:expulsion the student was not expelled [C]		
Indicate whether this incident involved bullying of another student.		
	Involved in Bullying	No 
	Use of Alcohol	No 

## Processing a Referral

After reviewing a referral, select the Reviewed by Admin check box to process the referral. This removes the Portal alert for the referral and makes the referral available on the Parent and Student Portal once it is saved. It will also add a Portal alert for the teacher indicating the referral was processed (if teachers have permissions to enter discipline referrals). When you select Reviewed by Admin, the referral cannot be saved unless all errors are resolved, even if you do not have access to the field that is in error.

1. On the Portal screen in the Alerts box, click the new referrals alert.

The number in the alert indicates the number of unprocessed referrals, including referrals entered by teachers (if teachers have permissions to enter discipline referrals).

Alerts

18 new referrals

There are 2 pending grade change requests

2. In the list of referrals, click on the student's name to open the referral.

Search Screen Simple List

☐ Show Referrals From All Schools
 ☐ Include Inactive
 ☐ All Years
 ☒ Closed Referrals
 Save

18 Records
 Export
Filter: OFF
Toggle Columns
Page Size: 20

Student	Student ID	Grade	Reporter	Incident Date	Submission Date	Processed	Teacher Code	Primary Discipline Code	Incident	Action(s)	Action/Disposition
Bahena, Carl	00086055	09	Weiss, Ashley	10/11/2023	10/11/2023 11:03 am			Bullying(SESISR)	78211		
Aguilar, Emily Dickinson	00022481	12	Weiss, Ashley	08/28/2023	08/28/2023 11:46 am			Alcohol Use/Possession/Sale(SESISR)	78204, 78206		
Aguilar, Emily Dickinson	00022481	12	Weiss, Ashley	08/25/2023	08/28/2023 12:34 pm			Bullying(SESISR)	78205		
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:42 pm		Class Cut...				
Acevedo, Diem Donna	00023057	09	Roxy, Frida Lizette	07/05/2023	07/05/2023 6:48 pm		Class Cut...	Violation (School Rules)			
Abe, Charlie Noel	00055879	10	Roxy, Frida Lizette	06/30/2023	06/30/2023 9:49 am		Abusive ...				
Abe, Charlie Noel	00055879	10	Garcia, Lizette	06/30/2023	06/30/2023 9:20 am			Disrespectful			
Acevedo, Diem Donna	00023057	09	Roxy, Frida Lizette	06/30/2023	06/30/2023 9:17 am		Abusive ...				
Alvarez, Douglas Adam	00075191	10	Weiss, Ashley	06/14/2023	06/14/2023 10:29 am			Bus Infraction			

3. Review the referral information. There may be required fields that need to be completed by an administrator, such as the **Discipline Code**.

- The district determines which fields on the referral form are required. The required fields are marked with an asterisk on the form, and are listed as errors in the Errors list on the right side of the screen if not completed. As required fields are completed, they are removed from the Errors list. Fields that do not pass the validation rules set on them are also included in the Errors list. Hovering over the field in the Errors list or the field on the form displays a tool-tip with information about why the field is in error. Clicking the field in the Errors list will bring you directly to that field on the form.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save

Abe, Charlie Noel Student	Roxy, Frida Lizette Reporter	07/05/2023 Incident Date	07/05/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	Class Cut (admin) Teacher Code

Action/Disposition Code  
Action Taken By  
Bus Number  
Context  
Incident ID 10000305  
Involved in Hate Crime ☐ N/A ☐ No ☐ Yes  
Refer Date  
Suspension Length (Hours)  
Time of Day Incident Occurred 01:20 pm  
Suspension Length (Days)  
Primary Discipline Code  
Other Discipline Code(s)

Primary Discipline code must not be blank.  
Others Involved  
Primary Discipline Code

4. Select **Reviewed by Admin**.

5. Click **Save** at the top-right corner of the screen.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

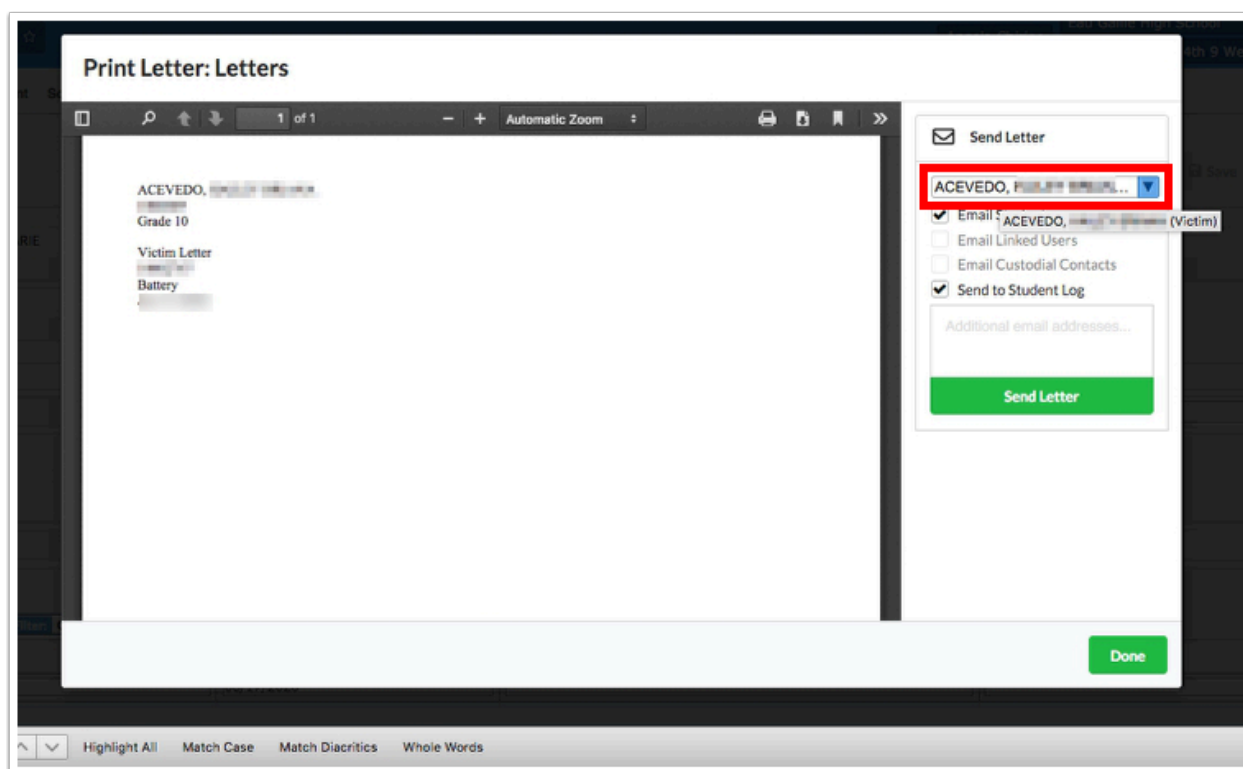
Print a Form/Letter Save

Abe, Charlie Noel Student	Roxy, Frida Lizette Reporter	07/05/2023 Incident Date	07/05/2023 Submission Date
<input checked="" type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	Class Cut (admin) Teacher Code

**i** If a letter was attached to a discipline code or action in Referral Codes & Actions, and that code or action was assigned to the student in this referral, the Print Letter pop-up window will display after the administrator processes and saves the referral. The letter can be printed, emailed, and sent to the student log.







## Adding a Victim Entry to a Referral

The Victims table is used to document the victims of the aggressor student. When the "Prevent Co-Enrollment" check box is selected on the entry, the aggressor cannot be enrolled in the victim's school for the defined time period. A warning message will display on the Add a Student screen indicating the student cannot be enrolled because he or she is an aggressor of the victim student.

❗ The Victims logging field must be enabled for use by selecting "New Referral" on the field in Discipline > [Referral Fields](#).

💡 Victims can be documented on the Victims tab in the aggressor student's record if the issue is not related to an on-campus reportable referral.

1. In the Victims table on the referral, enter the victim's **Student ID**.
2. Select a **Start Date** and **End Date**.

If the **Prevent Co-Enrollment** check box is selected, the aggressor cannot be enrolled in the victim's school during the specified date frame. If no end date is entered, then the aggressor cannot be enrolled in the victim's school indefinitely.

- 3. (Optional) Enter any **Comments**, if needed.
- 4. Select **Prevent Co-Enrollment** to prevent the aggressor from being enrolled in the victims school in the time frame defined in the Start Date and End Date fields.

Victims

Export Filter: OFF

	Student ID	Start Date	End Date	Comments	Prevent Co-Enrollment
	123456789	10/20/2023			<input checked="" type="checkbox"/>

- 5. Press **Enter** to add the entry.

Victims

Export Filter: OFF

	Student ID	Start Date	End Date	Comments	Prevent Co-Enrollment
		10/20/2023			<input type="checkbox"/>
	123456789	10/20/2023			<input checked="" type="checkbox"/>

## Adding an Action Record to a Referral

- 1. In the Action Record(s) table on the referral, select the **Action**.

The actions available for selection may be limited based on the discipline code selected for the referral, the number of occurrences of the discipline code, or based on your profile. See [Referral Codes & Actions](#) for more information.

- 2. Select the **Date Decided**.

This is the date the action was decided. This may or may not be the same as the start date of the action.

- 3. Select the **Date Begins** and **Date Ends** for the selected action.

The system will automatically calculate and populate the Length of Action, accounting for non-school days. Alternatively, enter the Date Begins and the Length of Action and the system will calculate and populate the Date Ends.

- i** A message will display if the Length of Action exceeds the number of allowable days set in [Referral Codes & Actions](#) (if in use.) The field will automatically populate with the maximum days allowed.

Action Record(s)

Export Filter: OFF

	Days Completed	Resultant Action	Date Decided	Date Begins	Date Ends	Length of Action	Attendance Code	Administered by	Zero-Tolerance: Expl	Action Record Notes	Detention Period
		Detention	10/20/2023	10/23/2023	10/23/2023	1					

4. Enter the **Attendance Code**, if applicable.

This is typically used for in-school or out-of-school suspensions but can also include other district-defined disciplinary absences.

- i** The student's attendance record will automatically update with the applicable attendance code from the start date to the end date of the action if the Date Begins is not today or in the past. The attendance code will also display for all of the teachers on the student's schedule. Teachers will be unable to edit this code when taking attendance. If the action timeframe has already begun and the student's attendance needs to be adjusted, the action record as well as the student's attendance will need to be updated. Updating only the action record will not adjust the student's attendance. When an action with a withdrawal code attached is added to a discipline referral, the student is automatically withdrawn as of the Date Decided or today's date if there is no Date Decided set.

5. (Optional) Enter who the action was **Administered by**.

6. (Optional) Enter any **Action Record Notes**.




7. (Optional) Select the **Detention Period** for when the detention will be served.

Action Record(s)

Export Filter: OFF

	Days Completed	Resultant Action	Date Decided	Date Begins	Date Ends	Length of Action	Attendance Code	Administered by	Zero-Tolerance: Expl	Action Record Notes	Detention Period
		Detention	10/20/2023	10/23/2023	10/23/2023	1		A. Weiss			Period 8














8. Press **Enter** to add the row.

Action Record(s)											
Export 		Filter: OFF									
	Days Completed	Resultant Action	Date Decided	Date Begins	Date Ends	Length of Action	Attendance Code	Administered by	Zero-Tolerance: Expl	Action Record Notes	Detention Period
											
		Detention	10/20/2023	10/23/2023	10/23/2023	1		A. Weiss			Period 8

## Merging Referrals

The Merge functionality allows multiple referrals for a student to be merged into one "parent" referral. Only unprocessed referrals in the same school and school year and with no disciplinary action records assigned can be merged. After merging the referrals, the parent referral can then be assigned the disciplinary action record and be processed by an administrator. Only users with the profile permission "Allow Merge of Referrals" can merge referrals.

1. Open one of the student's referrals that will be merged.
2. At the top of the screen, click the green gear icon.

Demographic   Enrollment   Schedule   Requests   Grades   Absences   Activities <b>Referrals</b> Test History   Audit Trail   Grad   Files   SSS   Choice   Billing			
Total Days of Discipline: 0			
<div>            Print a Form/Letter          Save       </div>			
Alonso, Mary Shelley	Abernathy, Nora Robin	05/15/2023	05/15/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>		<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code
Action/Disposition Code  Action Taken By Bus Number Context  Incident ID 10000194			

3. Click **Merge**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Alonso, Mary Shelley  
Student

Abernathy, Nora Robin  
Reporter

05/15/2023  
Incident Date

05/15/2023  
Submission

☐ Reviewed By Admin

☒ Closed

☐ Minor Infraction - No administrative action needed

Teacher C

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000194

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

Refer Date

Print a Form/Letter

Save

Duplicate

Delete

**Merge**

Link Incident

Send Back

Close Without Processing

Add New Referral

4. In the pop-up window, select one or multiple referrals to merge. Only unprocessed referrals in the same school and school year with no disciplinary action records are available for selection.

5. Click **Merge Selected into Current** to merge the selected referral(s) into the referral you have currently open. The current referral will become the "parent" referral.

Click **Merge Current into Selected** to merge the referral you have currently open into the selected referral. The selected referral will become the "parent" referral. This button is unavailable if more than one referral is selected.

### Merge Referrals

Select Referral(s)

Filter: OFF

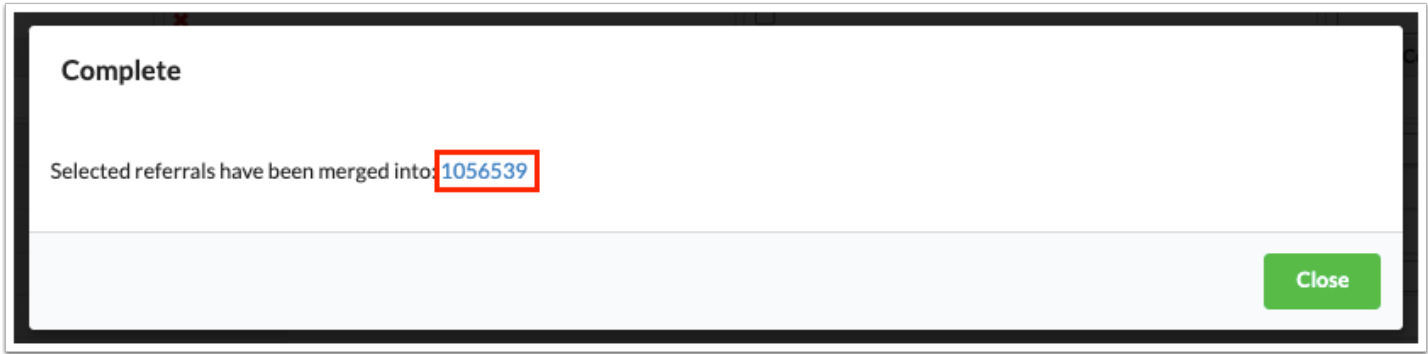
	Referral	Property Damage Indicator	Reported By Name	Others Involved	Parent Contact	Hope Event	Threat Assessment Event	Create Hope
<input checked="" type="checkbox"/>	1056540			NONE	Phone			
<input checked="" type="checkbox"/>	1056541			NONE	Phone			

Merge Current into Selected

Merge Selected into Current

Cancel

6. In the pop-up window, click the referral ID number of the parent referral to open that referral, or click **Close** to view the referral you have currently open.



At the top of the parent referral, "Parent of X Referral(s)" is displayed.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Parent of 2 Referral(s) Print a Form/Letter Save [Icons]

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/> Teacher Code

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000194

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

7. To view the child referral(s) merged into the parent referral, click the green gear icon at the top of the screen.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Parent of 2 Referral(s) Print a Form/Letter Save [Icons]

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/> Teacher Code

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000194

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

8. Click **Merge**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Parent of 2 Referral(s) Print a Form/Letter Save

Alonso, Mary Shelley Student Abernathy, Nora Robin Reporter 05/15/2023 Incident Date 05/15/2023 Submission

☐ Reviewed By Admin ☒ Closed ☐ Minor Infraction - No administrative action needed Teacher C

Action/Disposition Code  
Action Taken By  
Bus Number  
Context  
Incident ID 10000194  
Involved in Hate Crime ☐ N/A ☐ No ☐ Yes  
Refer Date

Duplicate  
 Delete  
 Merge  
 Link Incident  
 Send Back  
 Close Without Processing  
 Add New Referral

The child referrals are listed in the pop-up window.

### Merge Referrals

Children

Filter: OFF

	Referral	Property Damage Indicator	Reported By Name	Others Involved	Parent Contact	Hope Event	Threat Assessment Event	Create Hope
<input type="checkbox"/>	1056540			NONE	Phone			
<input type="checkbox"/>	1056541			NONE	Phone			

Unmerge

Cancel

9. Click the **Referral** link to view the child referral.



Merge Referrals

Children

Filter: OFF

	Referral	Property Damage Indicator	Reported By Name	Others Involved	Parent Contact	Hope Event	Threat Assessment Event	Create Hope
<input type="checkbox"/>	1056540			NONE	Phone			
<input type="checkbox"/>	1056541			NONE	Phone			

Unmerge

Cancel

At the top of the child referral, "Merged Into" is displayed with the parent referral's ID number. The ID number is a link that will open the parent referral.

Demographic Enrollment Schedule Requests Grades Absences Activities Referrals Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

☰ ☒ ☒ ☒

Merged Into: 1056539

Print a Form/Letter

Save

ⓘ

⚙

←

→

Alonso, Mary Shelley	Badillo, Gina	05/15/2023	05/15/2023
Student	Reporter	Incident Date	Submission Date
<input type="checkbox"/>	✖	<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000206

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

**i** The child referral(s) will no longer display in the Referrals list or in any associated reports. Only the parent referral's action and incident ID are reported to the state. In the parent referral, assign an action and process the referral as usual.

# Unmerging Referrals

1. In the parent referral, click the green gear icon at the top of the screen.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Parent of 2 Referral(s) Print a Form/Letter Save

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/> Teacher Code

Action/Disposition Code	
Action Taken By	
Bus Number	
Context	
Incident ID	10000194
Involved in Hate Crime	<input type="radio"/> N/A <input type="radio"/> No <input type="radio"/> Yes

2. Click **Merge**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Parent of 2 Referral(s) Print a Form/Letter Save

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/> Teacher Code

Action/Disposition Code	
Action Taken By	
Bus Number	
Context	
Incident ID	10000194
Involved in Hate Crime	<input type="radio"/> N/A <input type="radio"/> No <input type="radio"/> Yes

Duplicate  
Delete  
**Merge**  
Link Incident  
Send Back  
Close Without Processing  
Add New Referral

3. In the pop-up window, select each child referral that will be unmerged.

4. Click **Unmerge**.

### Merge Referrals

Children

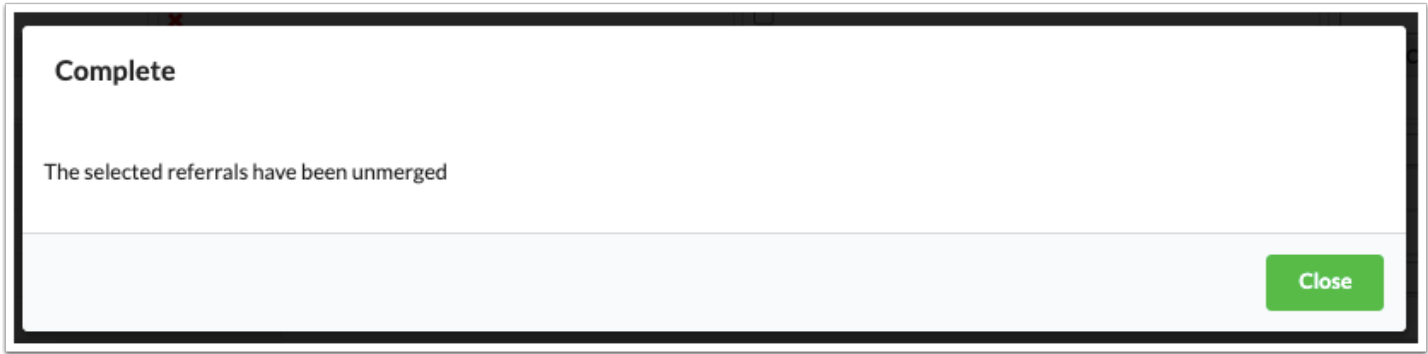
Filter: OFF

	Referral	Property Damage Indicator	Reported By Name	Others Involved	Parent Contact	Hope Event	Threat Assessment Event	Create Hope
<input checked="" type="checkbox"/>	1056540			NONE	Phone			
<input checked="" type="checkbox"/>	1056541			NONE	Phone			

**Unmerge**

Cancel

5. In the pop-up window, click **Close**.



The referrals are unmerged. The referrals will display in the Referrals list and in the associated reports.

## Duplicating a Referral

The duplicate functionality allows a referral to be copied and assigned to another student. This is useful if multiple students were involved in the same occurrence and the referral for each student will be mostly the same.

1. On the referral you want to duplicate, click the green gear icon at the top of the screen.

DemographicEnrollmentScheduleRequestsGradesAbsencesActivitiesReferralsTest HistoryAudit TrailGradFilesSSSChoiceBilling

Total Days of Discipline: 1  
Detention: 1

☰☏☒☒

Print a Form/Letter

Save

📄

ⓘ

⚙️

⬅️➡️

Abregan, Kenna Joy	Weiss, Ashley	10/17/2023	10/17/2023
Student	* Reporter	* Incident Date	Submission Date
<input checked="" type="checkbox"/>	✖	<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

2. Click **Duplicate**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 1  
Detention: 1

Print a Form/Letter Save

Abregan, Kenna Joy	Weiss, Ashley	10/17/2023	10/17/2023
Student	* Reporter	* Incident Date	Submission Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Comment

Action/Disposition Code  
Action Taken By  
Bus Number  
Context  
Incident ID 10000538  
Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

Duplicate  
Delete  
Merge  
Link Incident  
Send Back  
Close Without Processing  
Add New Referral

3. In the pop-up window, enter search criteria to locate the appropriate student and click **Search**.

### Select Student(s) To Duplicate Referral

Search Screen Simple List Customized List

**Student Search**

Student

Student Group N/A

☐ Search All Schools  
☐ Include Inactive Students

[More Search Options](#)

4. In the search results, select the appropriate student(s) and click **Duplicate**.

### Select Student(s) To Duplicate Referral

[Search Screen](#)
[Simple List](#)
[Customized List](#)
[Customize Student List](#)



Student: albury

2 Students
1 Selected

Filters: OFF

Search

2500

	Photo	Student	Student ID	Grade
<input type="checkbox"/>		Albury, [REDACTED]	00058528	09
<input checked="" type="checkbox"/>		Albury, [REDACTED]	00056517	12

Cancel

Duplicate

5. In the pop-up window, click the referral ID number to open the created referral, or click **Close** to return to the original referral.

### Complete

The following referral(s) have been created. Please click below to add an action and submit the referral(s).

Albury, [REDACTED]: **1055183**

Close

- ! The action records are not duplicated from the original referral, so the action records need to be entered for each duplicated referral. Other referral fields can also be updated on the referrals as needed.

# Linking to a Discipline Incident

A referral can be linked to a new or previously existing discipline incident.

## Creating a New Discipline Incident

1. At the top of the screen, click the green gear icon.

DemographicEnrollmentScheduleRequestsGradesAbsencesActivitiesReferralsTest HistoryAudit TrailGradFilesSSSChoiceBilling

Total Days of Discipline: 0

Print a Form/Letter

Save

Abe, Charlie Noel	Weiss, Ashley	10/16/2023	10/16/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

2. Click **Link Incident**.

DemographicEnrollmentScheduleRequestsGradesAbsencesActivitiesReferralsTest HistoryAudit TrailGradFilesSSSChoiceBilling

Total Days of Discipline: 0

Print a Form/Letter

Save

Abe, Charlie Noel	Weiss, Ashley	10/16/2023	10/16/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID10000471

Involved in Hate Crime☐ N/A ☐ No ☐ Yes

Duplicate

Delete

Merge

Link Incident

Send Back

Close Without Processing

Add New Referral


3. In the pop-up window, click the **Add New** tab.

The screenshot shows a web form for adding a new incident. At the top left, there is a 'Link' button and a red-outlined 'Add New' button. In the top right corner, there is a 'Save' button. The main form area contains several fields, some of which are marked with an asterisk (\*) to indicate they are required. The 'Errors' list on the right side of the form shows two errors: 'Incident Context' and 'Incident Date', both marked with a red 'x' icon.

Field	Value
* Incident Date	
* Location	School Grounds/On Campus
Incident Type	
* Involvement Type	Student
* Incident Context	
Drug Related	No [N]
* Drug Description	Not Applicable. No drugs were involved in this incident.
Alcohol Related	No [N]
Gang Related	No [N]
Weapon Related	No, the Incident was not Weapon-Related
* Weapon Description	Not Applicable
Hate Crime Related	No [N]
* Bullying Related	No, the incident is not bully-related [N]
* Injury Related	None

**Errors**

- ✖ Incident Context
- ✖ Incident Date

 The district determines which fields on the incident form are required. The required fields are marked with an asterisk on the form, and are listed as errors in the Errors list on the right side of the screen if not completed. As required fields are completed, they are removed from the Errors list.

Fields that do not pass the validation rules set on them are also included in the Errors list. Hovering over the field in the Errors list or the field on the form displays a tool-tip with information about why the field is in error. Clicking the field in the Errors list will bring you directly to that field on the form.

**4.** Complete the form and click **Save** when finished.

×

Link

Add New

Save

* Incident, Basis-Sexual Orientation	Z - Not reported as a bullying or harassment incident.	▼
* Incident, Basis-Religion	Z - Not reported as a bullying or harassment incident.	▼
* Incident Date	10/16/2023	
* Location	School Grounds/On Campus	▼
Incident Type		▼
* Involvement Type	Student	▼
* Incident Context	During school hours	▼
? Drug Related	No [N]	▼
* Drug Description	Not Applicable. No drugs were involved in this incident.	▼
Alcohol Related	No [N]	▼
Gang Related	No [N]	▼
Weapon Related	No, the Incident was not Weapon-Related	▼
* Weapon Description	Not Applicable	▼
Hate Crime Related	No [N]	▼
* Bullying Related	No, the incident is not bully-related [N]	▼

# Linking an Existing SESIR Incident to the Referral

1. At the top of the screen, click the green gear icon.

Demographic

Enrollment

Schedule

Requests

Grades

Absences

Activities

Referrals

Test History

Audit Trail

Grad

Files

SSS

Choice

Billing

Total Days of Discipline: 0

Print a Form/Letter

Save

Abe, Charlie Noel	Weiss, Ashley	10/16/2023	10/16/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

2. Click **Link Incident**.

Demographic

Enrollment

Schedule

Requests

Grades

Absences

Activities

Referrals

Test History

Audit Trail

Grad

Files

SSS

Choice

Billing

Total Days of Discipline: 0

Print a Form/Letter

Save

Abe, Charlie Noel	Weiss, Ashley	10/16/2023	10/16/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000471

Involvement in Hate Crime ☐ N/A ☐ No ☐ Yes

Duplicate

Delete

Merge

Link Incident

Send Back

Close Without Processing

Add New Referral



The Link tab is displayed by default.

- i** If the system preference "Enable All Schools checkbox when linking a SESIR" is enabled, the "All Schools" check box is displayed in the Link tab. Select the check box to display SESIR incidents from all schools.

×

Link

Add New

Available

☒ All Schools

Filter: OFF

		Incident, Basis-Religion	Incident, Basis-Sexual Orientation	Incident, Hazing-Related	Victims of Homicide	Wei
<input type="radio"/>	1	Z - Not a bullying or harassment incident.	Z - Not a bullying or harassment incident.	N - No		Z - N
<input type="radio"/>	3	Z - Not a bullying or harassment incident.	Z - Not a bullying or harassment incident.	N - No		Z - N
<input type="radio"/>	5	Z - Not a bullying or harassment incident.	Z - Not a bullying or harassment incident.	N - No		Z - N
<input type="radio"/>	7	Z - Not a bullying or harassment incident.	Z - Not a bullying or harassment incident.	N - No		Z - N

Link

- 3. Select the discipline incident to link the referral to.
- 4. Click **Link**.

Link

Add New

Available

☐ All Schools

Filter: OFF

		School	Year	Incident, Basis-Religion	Incident, Basis-Sexual Orienta
<input type="radio"/>	78201	Focus High School - 0041	2022	X - Other Religion	N - The bullying or harassment
<input type="radio"/>	78202	Focus High School - 0041	2022	Z - Not reported as a bullying or harassment incident.	Z - Not reported as a bullying o
<input type="radio"/>	78204	Focus High School - 0041	2022	Z - Not reported as a bullying or harassment incident.	Z - Not reported as a bullying o
<input type="radio"/>	78205	Focus High School - 0041	2022	Z - Not reported as a bullying or harassment incident.	Z - Not reported as a bullying o
<input type="radio"/>	78206	Focus High School - 0041	2022	Z - Not reported as a bullying or harassment incident.	Z - Not reported as a bullying o
<input type="radio"/>	78207	Focus High School - 0041	2022	Z - Not reported as a bullying or harassment incident.	Z - Not reported as a bullying o
<input checked="" type="radio"/>	78209	Focus High School - 0041	2022	N - The bullying or harassment incident was not on the basis of religion.	N - The bullying or harassment
<input type="radio"/>	78211	Focus High School - 0041	2022	N - The bullying or harassment incident was not on the basis of religion.	N - The bullying or harassment
<input type="radio"/>	78212	Focus High School - 0041	2022	Z - Not reported as a bullying or harassment incident.	Z - Not reported as a bullying o

Link

## Unlinking from a Discipline Incident

The link between a referral and discipline incident can be removed, if needed.

1. At the top of the screen, click the green gear icon.

Demographic
Enrollment
Schedule
Requests
Grades
Absences
Activities
**Referrals**
Test History
Audit Trail
Grad
Files
SSS
Choice
Billing

Total Days of Discipline: 0

Linked Incident: 78209

Print a Form/Letter

Save

Abe, Charlie Noel	Weiss, Ashley	10/16/2023	10/16/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/>
Reviewed By Admin			Teacher Code

2. Click **Link Incident**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Linked Incident: 78209 Print a Form/Letter Save [Icons]

Abe, Charlie Noel Student	Weiss, Ashley Reporter	10/16/2023 Incident Date	10/16/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="checkbox"/> Teacher Referral

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000471

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

Refer Date

Duplicate

Delete

Merge

**Link Incident**

Send Back

Close Without Processing

Add New Referral

3. In the pop-up window, click **Unlink**.

Link

Linked

Filter: OFF

	School	Year	Incident, Basis-Religion	Incident, Basis-Sexual Orientation
78209	Focus High School - 0041	2022	N - The bullying or harassment incident was not on the basis of religion.	N - The bullying or harassment incident was not on the basis of sexual orientation.

Unlink

## Sending a Referral Back for Correction

Administrators with the "Send Back Referrals" profile permission can send a referral back to the originator when corrections are needed. The administrator can add a comment on why it is being sent back. A Portal alert will display to the originator indicating a referral was returned with comments. When the referral is opened, the comment will display at the top of the referral form and will remain until the referral is updated. When a referral is sent back for correction, it does not count against the student until the referral is sent back to the administrator.

1. On the referral that will be sent back for correction, click the green gear icon at the top of the screen.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save [Info] [Settings] [Back] [Forward]

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/> Teacher Code

## 2. Click **Send Back**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save [Info] [Settings] [Back] [Forward]

Alonso, Mary Shelley Student	Abernathy, Nora Robin Reporter	05/15/2023 Incident Date	05/15/2023 Submission Date
<input type="checkbox"/> Reviewed By Admin	<input checked="" type="checkbox"/> Closed	<input type="checkbox"/> Minor Infraction - No administrative action needed	<input type="text"/> Teacher Code

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000194

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

Duplicate

Delete

Merge

Link Incident

**Send Back**

Close Without Processing

Add New Referral

## 3. In the pop-up window, enter a **Comment** and click **Send Back**.

### Send Referral Back For Correction

**Comment**

Send Back

Cancel

**i** When a referral is sent back for correction, "Returned" will display in the "Processed" column when viewing the referrals list.

Demographic	Enrollment	Schedule	Requests	Grades	Absences	Activities	<b>Referrals</b>	Test History	Audit Trail	Grad	Files	SSS	Choice	Billing
Total Days of Discipline: 0														
<input type="checkbox"/> Show Referrals From All Schools <input type="checkbox"/> All Years <input type="checkbox"/> Minor Infractions <input checked="" type="checkbox"/> Closed Referrals														
<div> <span>+ Add</span> <span>Save</span> </div>														
3 Records <span>Export</span> <span>Filter: OFF</span> <span>Toggle Columns</span> <span>Page Size: 20</span>														
Student	Student ID	Grade	Reporter	Incident Date	Submission Date	Processed	Teacher Code	Primary Discipline Code	Incident	Action(s)	Action/Disposition Code	Action T		
Alonso, Mary Shelley	00055961	09	Abernathy, Nora Robin	05/15/2023	05/15/2023 3:06 pm	Returned		Dress Code Violation						

**i** The originator will receive a Portal alert "1 referral has been returned with comments." At the top of the referral form, it will indicate that the referral was sent back with comments, and will display the comments entered. The originator can then correct and resubmit the referral.

Alerts

1 referral has been returned with comments

Online Assessments and Exams  
 1 / 5 students have completed the exam, Geometry Assessment, for WORLD HIST (Period 3)

7 new messages

Demographic	Enrollment	Schedule	Requests	Grades	Absences	<b>Referrals</b>	Test History	Grad	SSS
Total Days of Discipline: 0									
<div> <span>Print a Form/Letter</span> <span>Save</span> <span>Info</span> </div>									
<div> <b>The Referral Has Been Returned With The Following Comment:</b> Needs more details in description         </div>									
Alonso, Mary Shelley	Abernathy, Nora Robin	05/15/2023					05/15/2023		
Student	Reporter	* Incident Date					Submission Date		

## Closing a Referral without Processing

A discipline referral can be closed without processing by an administrator when the system preference "Enable Closing of Unprocessed Referrals" is enabled in Setup > System Preferences > [General tab](#).

Unlike deleting a referral, closed referrals are still available in Focus for viewing. When a referral is closed, it is indicated at the top of the referral form, along with any comments entered by the user who closed the referral.

Closed referrals do not count against the student; closed referrals are not included in the "X new referrals" Portal alert, in counts for Discipline > [Category Breakdown](#) or Discipline > [Students with Referrals](#), or in state reporting. Closed referrals do not display on the Parent/ Student Portal.

A referral cannot be closed if it is linked to a discipline incident, if it has an action record, or if it has already been processed.

When the system preference "Alert Teachers when a Referral is Closed" is enabled, the teacher who submitted the referral will receive a Portal alert when the referral is closed by an administrator. Clicking the alert will open the referral, where the teacher can review the comment entered by the administrator.

1. On the referral that will be closed, click the green gear icon at the top of the screen.

The screenshot shows the top of the Referrals form. The navigation bar includes tabs for Demographic, Enrollment, Schedule, Requests, Grades, Absences, Activities, **Referrals**, Test History, Audit Trail, Grad, Files, SSS, Choice, and Billing. Below the navigation bar, there is a section for "Total Days of Discipline: 0". To the right of this section, there is a toolbar with icons for Print a Form/Letter, Save, and a green gear icon. The form itself is divided into several sections: Student (Abe, Charlie Noel), Reporter (Weiss, Ashley), Incident Date (10/16/2023), Submission Date (10/16/2023), Reviewed By Admin (checkbox), Closed (checkbox with a red X), Minor Infraction - No administrative action needed (checkbox), and Teacher Code (dropdown menu).

2. Click **Close Without Processing**.

The screenshot shows the Referrals form with the dropdown menu open. The dropdown menu contains the following options: Duplicate, Delete, Merge, Link Incident, Send Back, **Close Without Processing** (highlighted with a red box), and Add New Referral. The form itself is divided into several sections: Student (Abe, Charlie Noel), Reporter (Weiss, Ashley), Incident Date (10/16/2023), Submission Date (10/16/2023), Reviewed By Admin (checkbox), Closed (checkbox with a red X), Minor Infraction - No administrative action needed (checkbox), and Teacher Code (dropdown menu). Below the form, there is a section for Action/Disposition Code, Action Taken By, Bus Number, Context, Incident ID (10000471), and Involved in Hate Crime (radio buttons for N/A, No, Yes).

3. Enter a comment and click **Close**.

Close Referral Without Processing

Comment

Close

Cancel

The comment is displayed at the top of the referral form. The Closed field on the form displays a green check mark.

Demographic
Enrollment
Schedule
Requests
Grades
Absences
Activities
Referrals
Test History
Audit Trail
Grad
Files
SSS
Choice
Billing

Total Days of Discipline: 0

Print a Form/Letter

Save

The Referral Has Been Closed With The Following Comment: A referral is not needed

Abe, Charlie Noel

Student

Weiss, Ashley

\* Reporter

10/16/2023

\* Incident Date

10/16/2023

Submission Date

☐

Reviewed By Admin

✓

Closed

☐

Minor Infraction - No administrative action needed

Teacher Code

## Deleting a Referral

Referrals can be deleted by users with the profile permission to delete referrals. Referrals that have been processed and referrals linked to a discipline incident cannot be deleted.

1. On the referral that will be deleted, click the green gear icon at the top of the screen.

Demographic
Enrollment
Schedule
Requests
Grades
Absences
Activities
Referrals
Test History
Audit Trail
Grad
Files
SSS
Choice
Billing

Total Days of Discipline: 0

Print a Form/Letter

Save

Abe, Charlie Noel

Student

Roxy, Frida Lizette

\* Reporter

06/30/2023

\* Incident Date

06/30/2023

Submission Date

☐

Reviewed By Admin

✗

Closed

☐

Minor Infraction - No administrative action needed

Abusive Behavior (admin)

Teacher Code

2. Click **Delete**.

3. In the confirmation message, click **Delete**.

## Viewing Student Documentation

The referral includes a link to the Student Documentation tab of the student's record. If the minor infractions functionality is enabled for your school (controlled by the system preference "Enable Minor Infractions" in Setup > [System Preferences](#) > [General tab](#)), then a list of the student's minor infractions from the school year is also displayed.

**i** To make a field viewable in Student Documentation, select "Visible on Discipline Referral" on the field in Students > [Student Fields](#).

1. At the top of the referral, click the purple info icon.



Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save [Icons]

Abe, Charlie Noel	Roxy, Frida Lizette	06/30/2023	06/30/2023
Student	* Reporter	* Incident Date	Submission Date
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abusive Behavior (admin)
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

2. After reviewing the information, click **Close**.

### Student Documentation

**Student Info**

NO  
TSIC

**Classroom Infraction Report**

Filter: OFF

Date	Incident Type	Intervention	Location	Parent Contact	If Incident Type (*Other ) enter description	Reported By:	Reported By:
01/21/2020	Tardy	Student conference	Classroom	Email		A. Weiss	Alvaro, .

**Minor Infractions**

Filter: OFF

Incident ID	Involved in Hate Crime	Zero-Tolerance:Expulsion	Time of Day Incident Occurred	Involved in Bullying	Recommendation	Processed	Sc
10000800		The student was not expelled.[Z]	08:45 am	No			Nc

Close

## Printing Discipline Letters

If letters set up in Students > [Print Letters & Send Email](#) and/or Students > [Communication](#) were associated with the Discipline module, the letters will be available to print when viewing a referral. Only users with the profile permission "Print Letters" can print discipline letters.

1. At the top of the referral, select a letter from the **Print a Form/Letter** pull-down.

Demographic Enrollment Schedule Requests Grades Absences Activities <b>Referrals</b> Test History Audit Trail Grad Files SSS Choice Billing			
Total Days of Discipline: 0			
		<div> <div>Print a Form/Letter</div> <div>Save</div> <div></div> <div></div> <div></div> <div></div> </div>	
Abe, Charlie Noel	Roxy, Frida Lizette	06/30/2023	06/30/2023
Student	* Reporter	* Incident Date	Submission Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abusive Behavior (admin)
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

A PDF preview of the letter is displayed in a pop-up window. The letter can be downloaded to your computer or printed. There are also options at the right side of the window to email the student, linked users, or custodial contacts, or send to the student log. Sending the letter to the student log will automatically create a letter in the Letter Log student category, which will include a time stamp and a printable version of the letter.

2. Click **Done** when finished.

Print Letter: Discipline Referral Letter

HsqHHWVuZHN...

1 / 1

88%

Student Name: Abe, Charlie Noel

Student ID: 0055879

Grade Level: 10

Date: Jun 30, 2023

Reported by: Roxy, Frida

Incident ID: 10000293

Location of Incident: Athletic Field

Incident Description: Rude

Discipline Code: Disrespectful

Zero Tolerance: The student was not expelled.[Z]

Teacher Actions: Other

Parent Contact: Other

Reported to Law: No, the student was not arrested [N]

Use of Drugs: No

Use of Alcohol: No

Send Letter

☐ Email Student
 ☐ Email Student Personal Email
 ☐ Email Linked Users
 ☐ Email Custodial Contacts
 ☐ Send to Student Log

Additional email addresses...

Send Letter

☐ Include Student Name/ID on Each PDF Page (Print Only)

Done

## Printing a Referral

The referral screen can be printed, if needed.

1. At the top of the referral, click the blue print icon.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save [Printer Icon] [Info Icon] [Gear Icon] [Left Arrow] [Right Arrow]

Abe, Charlie Noel	Roxy, Frida Lizette	06/30/2023	06/30/2023
Student	* Reporter	* Incident Date	Submission Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abusive Behavior (admin)
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

2. Follow your printer's prompts to print the referral.

## Adding a New Referral

A new referral can be added for the student you are currently viewing directly from the Referrals screen.

1. At the top of the referral, click the green gear icon.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save [Printer Icon] [Info Icon] [Gear Icon] [Left Arrow] [Right Arrow]

Abe, Charlie Noel	Roxy, Frida Lizette	06/30/2023	06/30/2023
Student	* Reporter	* Incident Date	Submission Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abusive Behavior (admin)
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

2. Click **Add New Referral**.

Demographic Enrollment Schedule Requests Grades Absences Activities **Referrals** Test History Audit Trail Grad Files SSS Choice Billing

Total Days of Discipline: 0

Print a Form/Letter Save [Printer Icon] [Info Icon] [Gear Icon] [Left Arrow] [Right Arrow]

Abe, Charlie Noel	Roxy, Frida Lizette	06/30/2023	06/30/2023
Student	* Reporter	* Incident Date	Submission Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Abusive Behavior (admin)
Reviewed By Admin	Closed	Minor Infraction - No administrative action needed	Teacher Code

Duplicate

Delete

Merge

Link Incident

Send Back

Close Without Processing

**Add New Referral**

Action/Disposition Code

Action Taken By

Bus Number

Context

Incident ID 10000293

Involved in Hate Crime ☐ N/A ☐ No ☐ Yes

The Add Referral screen is displayed with the current student already selected. Complete the [Add Referral](#) form and click **Save**.

# Did You Know?

If the student has been flagged as a Protected Student, a warning message displays on the Referrals screen: **DO NOT RELEASE STUDENT INFO**. The warning message displays for all users. For more information about how to set up a Protected Student, see [Student Fields: Protected Student](#).

DemographicEnrollmentScheduleRequestsGradesAbsencesActivitiesReferralsTest HistoryAudit TrailGradFilesSSSChoiceBilling

Total Days of Discipline: 1  
Detention: 1

☐ Show Referrals From All Schools☐ All Years☐ Minor Infractions☒ Closed Referrals

DO NOT RELEASE STUDENT INFO

+ AddSave

1 RecordsExportFilter: OFFToggle ColumnsPage Size: 20

Student	Student ID	Grade	Reporter	Incident Date	Submission Date	Processed	Teacher Code	Primary Discipline Code	Incident	Action(s)	Action/Disposition Code
Abregan, Kenna Joy	00061843	10	Weiss, Ashley	10/17/2023	10/17/2023 7:45 am	Processed		Disruption Lesser/Disorderly Conduct		Detention (1)	