



## Referrals



# Table of Contents

**Referrals** ..... 1



# Referrals

## **Discipline > Maintenance > Referrals**

This page allows designated discipline approvers to review discipline referrals entered in TeacherPortal and take appropriate action (i.e, review or create an incident record). These discipline referrals may be entered by instructors or other employees who have authorization to enter referrals, such as a bus driver.

- You can only review referrals if you are designated as a discipline approver (i.e., the **Discipline Approver** field is selected on [Registration > Maintenance > Campus Profile > Campus Information Maintenance > Principal/Counselor](#)).
- All approvers can view all referrals.

Discipline incident numbers are automatically assigned when an incident record is created.

### **Review data:**

To retrieve a list of referrals, type data in one or more of the following fields.

You must type a value in either the **Admin Number** or **Admin Name** field. The other fields are optional.

<b>Admin Number</b>	Begin typing the administrator's ID. As you begin typing, the drop-down list displays administrators whose IDs match the numbers you have typed. Select the administrator from the drop-down list.
<b>Admin Name</b>	Begin typing the administrator's name in one of the following formats: <ul style="list-style-type: none"> <li>• Last name, comma, first name</li> <li>• Last name initial, comma, first name initial</li> </ul> As you begin typing, the drop-down list displays administrators whose names match the letters you have typed. Select the administrator from the drop-down list.
<b>From Grade Level To Grade Level</b>	Type the beginning and ending grade levels for the range you want to retrieve.
<b>From Name Range To Name Range</b>	Type the range of last names you want to retrieve (e.g, AA-MC).
<b>From Incident Date To Incident Date</b>	Type beginning and ending dates to see referrals for a specific range of dates. Use the MMDDYYYY format.

**Pending  
Reviewed  
Completed**



Select one or more statuses to see only referrals with a particular status. You must select at least one.

Click **Retrieve**.

- If there are multiple pages, [page through the list](#).

- [The grid can be re-sorted](#).

You can re-sort the grid by clicking on an underlined column heading. It will sort in ascending order. Click it again to sort in descending order.

A triangle next to the column heading indicates the column by which the grid is currently sorted and whether it is sorted in ascending  or descending  order.

- [Notes on sorting multi-student incidents](#)

The default sort is by **Status (Pending, Reviewed, Completed)**, then **Incident Date**, and then by **Student ID**.


In the default sort, students in a multi-student incident are grouped together within status and incident date, and then by student ID. The **Status** field displays only in the row of the first student ID.

However, when sorting the grid by student ID, student name, or other column heading, the students may no longer be listed next to each other, even though they are still associated with the same incident. Sorting the grid does not break the association between these students; it merely separates the names in the list.

The following data is displayed.

<b>Status</b>	The current status of the referral is displayed:  <b>Pending</b> status indicates referrals that have been submitted via TeacherPortal and are awaiting review and further action from an administrator.  <b>Reviewed</b> status indicates referrals that have been reviewed by an administrator, and for which the administrator is taking no further action.  <b>Completed</b> status indicates referrals that have been reviewed by an administrator, and for which further action was taken (i.e., an incident record was created.)
<b>Student ID</b>	The student's ID is displayed.
<b>Students</b>	The names of the students associated with the referral are displayed.

<b>Teachers</b>	The name of the instructor who submitted the referral is displayed.
<b>Grade Level</b>	The student's current grade level is displayed.
<b>Offense Code</b>	The PEIMS offense code associated with the incident is displayed.
<b>Referrer Comment</b>	Any comments entered by the instructor or employee who entered the referral are displayed.
<b>Loc</b>	A code indicating the location of the incident is displayed.
<b>Severity</b>	A code indicating the severity of the incident is displayed, as indicated by the referrer. For example, code H (i.e., high) is displayed if the nature of the offense is very severe.
<b>Incident Date</b>	The date on which the incident occurred is displayed.
<b>Sent to Office</b>	The field is selected if the student was sent to the office as a result of the incident.
<b>Last Updated Date</b>	The date on which the discipline referral was last updated via TeacherPortal is displayed.

Click  to take action for the student for this referral.

A pop-up window opens.

**NOTE:** Enlarge window to see all fields.

<b>Referral Detail</b>	Information is displayed as entered in TeacherPortal by the employee who submitted the incident referral.
<b>Review or Create Incident</b>	Indicate if you want to create an incident record or take no further action:  <b>Create incident</b> - Select to create an incident record.  <b>Review</b> - Select if you have reviewed the referral and are taking no further action.
<b>Return Message</b>	Whether you created an incident record or not, it is strongly recommended that you type comments explaining your decision, up to 2000 characters.
<b>Reviewed/Returned Date</b>	Type the date using the MMDDYYYY format that the referral was reviewed or returned. This date cannot be less than the Incident Date.

Click **Save**. To enable the **Save** button, you must select **Review** or **Create Incident**.

- The window closes, and the Discipline Maintenance page (Discipline > Maintenance > Student > Maintenance) opens where you can add additional information for all involved students, such as offense and action codes, and save the incident record.
- If a referral record is created with no data in the action (bottom) grid on Maintenance > Student > Maintenance, a message is displayed indicating that the record was created with only the basic information. You must add the required information. Once the action information has been saved for the student (or all students involved in the incident have matching action information), the message is cleared.

Click **Cancel** to close the window without making changes.



## Back Cover