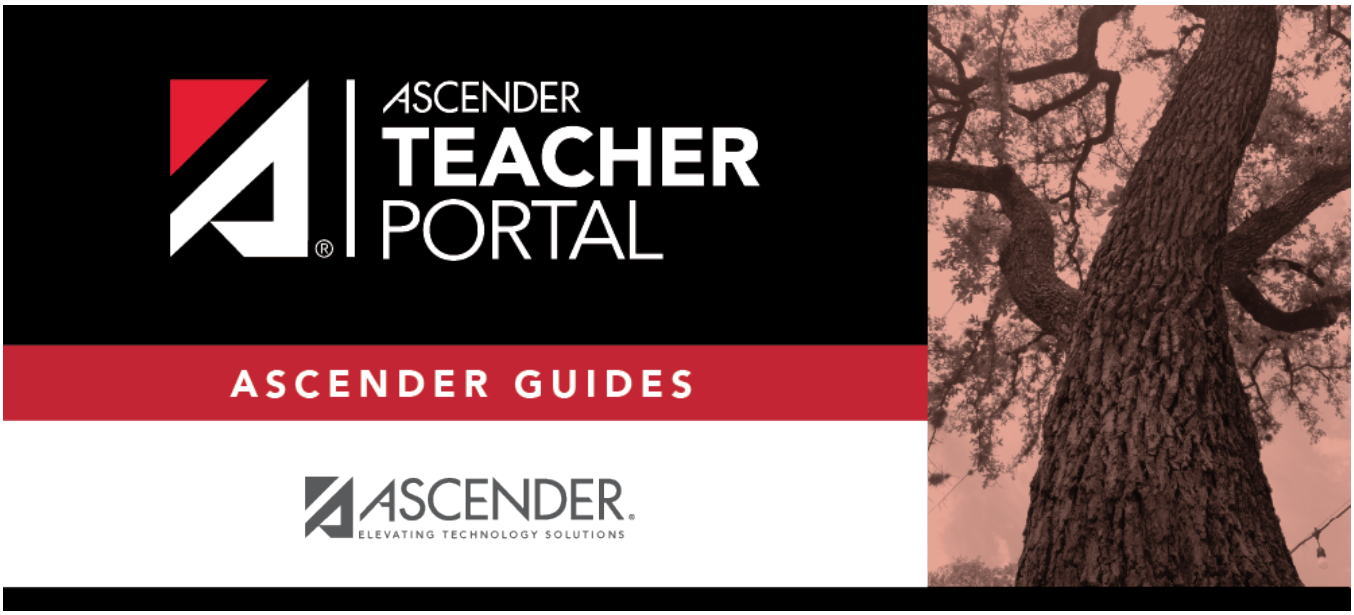

admin-manage-discipline

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NOTE: This step must be performed by an administrator with access to Discipline.

Discipline > Maintenance > Referrals

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

NOTE:

- You can only view 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 discipline approvers can view all referrals for the campus.

❑ Discipline approvers who are set up to receive email notification of discipline referrals will receive an email message whenever an applicable referral is submitted from TeacherPortal.

The email message informs the approver that a referral has been submitted from TeacherPortal, but does not contain detailed information about the incident. The approver must log on to the Discipline application to view the complete information.

An approver who does not receive an email notification can also access referrals by logging on to Discipline; the email message is not required.

When you first access the page, no data is displayed.

❑ To retrieve a list of referrals, use the **Admin Number** or **Admin Name** autosuggest field to retrieve an administrator by ID or name.

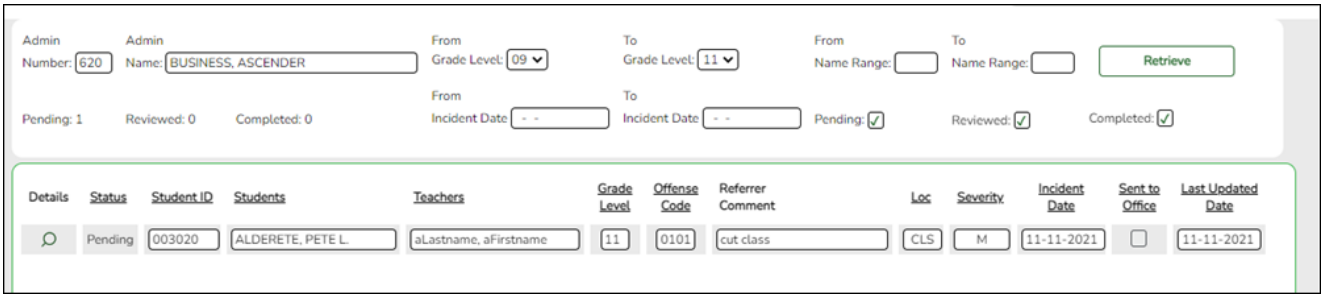
❑ You can limit the referrals list by specifying grade level, name, or date ranges, or a particular referral status, using one or more of these optional fields. Or, leave all of these fields blank to retrieve all referrals for the campus:

From/To Grade Level	Campus default values are displayed. If needed, you can clear these fields, or select other beginning and ending grade levels for the range of grade levels you want to retrieve.

From/To Name Range	Type the range of last names you want to retrieve (e.g., AA-MC).
From/To Name Incident Date	Type the beginning and ending dates to see referrals for a specific range of dates.
Status	Select **Pending**, **Reviewed**, and/or **Completed** to review only referrals with a specific status (or more than one specific status)

❑ Click **Retrieve**.

The referrals are retrieved according to the criteria specified, sorted by status.



Status	The **Status** field displays the current status of the referral:	
	Pending	Indicates that the referral was submitted via TeacherPortal and is awaiting review and further action from an administrator.
	Reviewed	Indicates that the referral was reviewed by an administrator, and the administrator is taking no further action.
	Completed	Indicates that the referral was reviewed by an administrator, and that further action was taken (i.e., an incident record was created).
Students	The full name and ID of the student associated with the referral is displayed. If multiple students were involved, a separate row is displayed for each involved student. Students are listed alphabetically, regardless of their involvement in the incident. Only the row for the first student displays incident data.	
Teachers	The name of the teacher who submitted the referral is displayed.	
Grade Level	The student's grade level is displayed.	

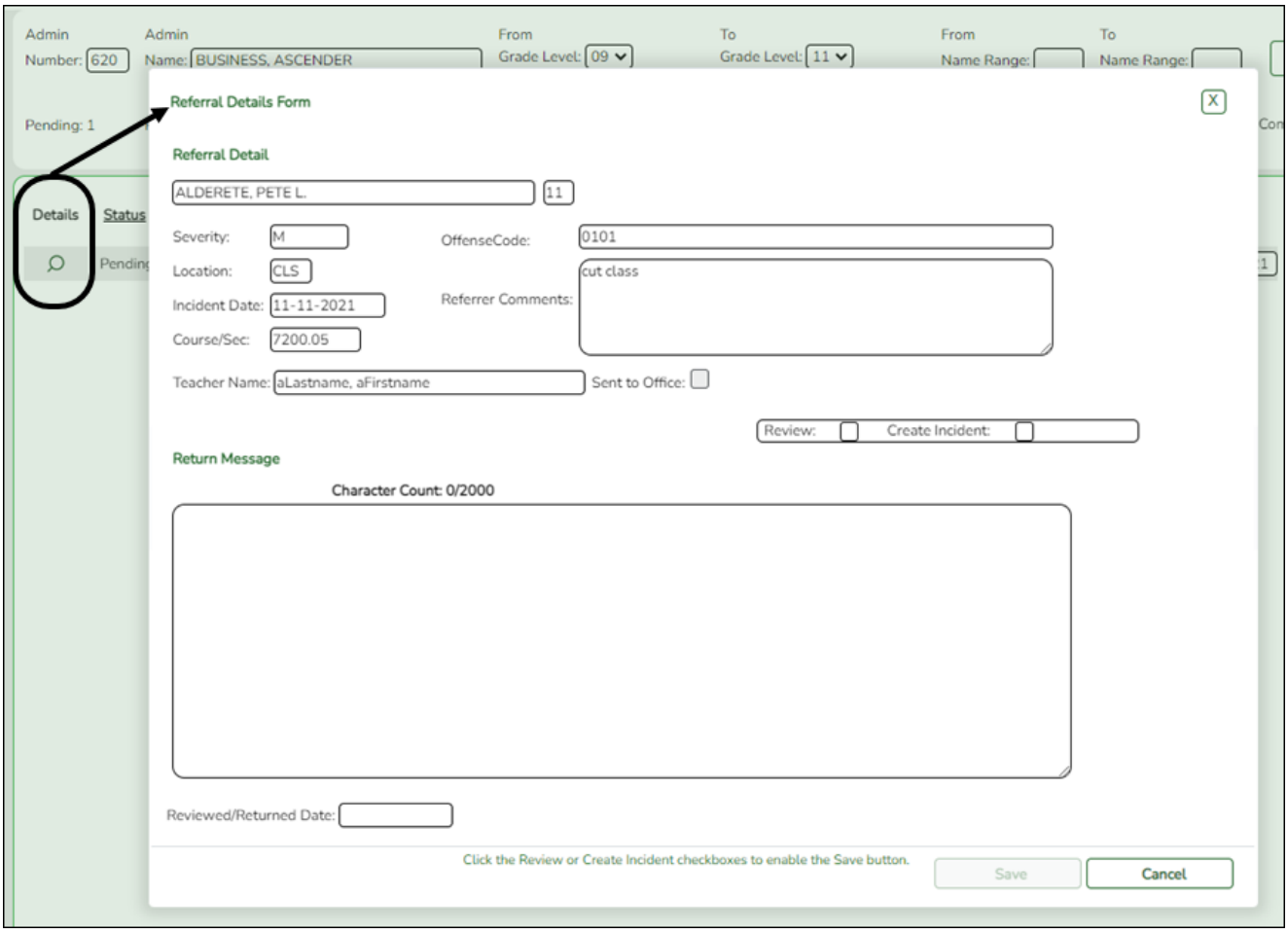
The following information is entered in TeacherPortal by the teacher or non-instructional staff member who submitted the referral.

Offense Code	The offense code selected by the teacher is displayed. **NOTE:** From TeacherPortal, teachers can only select offense codes that are allowed to be displayed in TeacherPortal. This is determined by the **Include in txGradebook** field on ***Discipline > Maintenance > Tables > District Level > Offense Codes***.
Referrer Comment	The comments entered by the teacher who entered the referral are displayed. Only the first few words are visible in the grid, so you may need to click the to open the details window where you can view the entire comment.
Loc	The code indicating the location of the incident. These codes are established on ***Discipline > Maintenance > Tables > District Level > Location Codes***.

Severity	The severity of the incident, as indicated by the referrer. For example, High is displayed if the nature of the offense is very severe.
Incident Date	The date on which the incident occurred is displayed.
Sent to Office	The field is selected if the student(s) were sent to the office as a result of the incident.
Last Updated	The date on which the discipline referral was last updated via TeacherPortal. This date is updated every time the submitter re-submits a pending referral.

❑ Click to review the referral and decide whether you will create an incident or take no further action.

The Referral Details Form window opens.

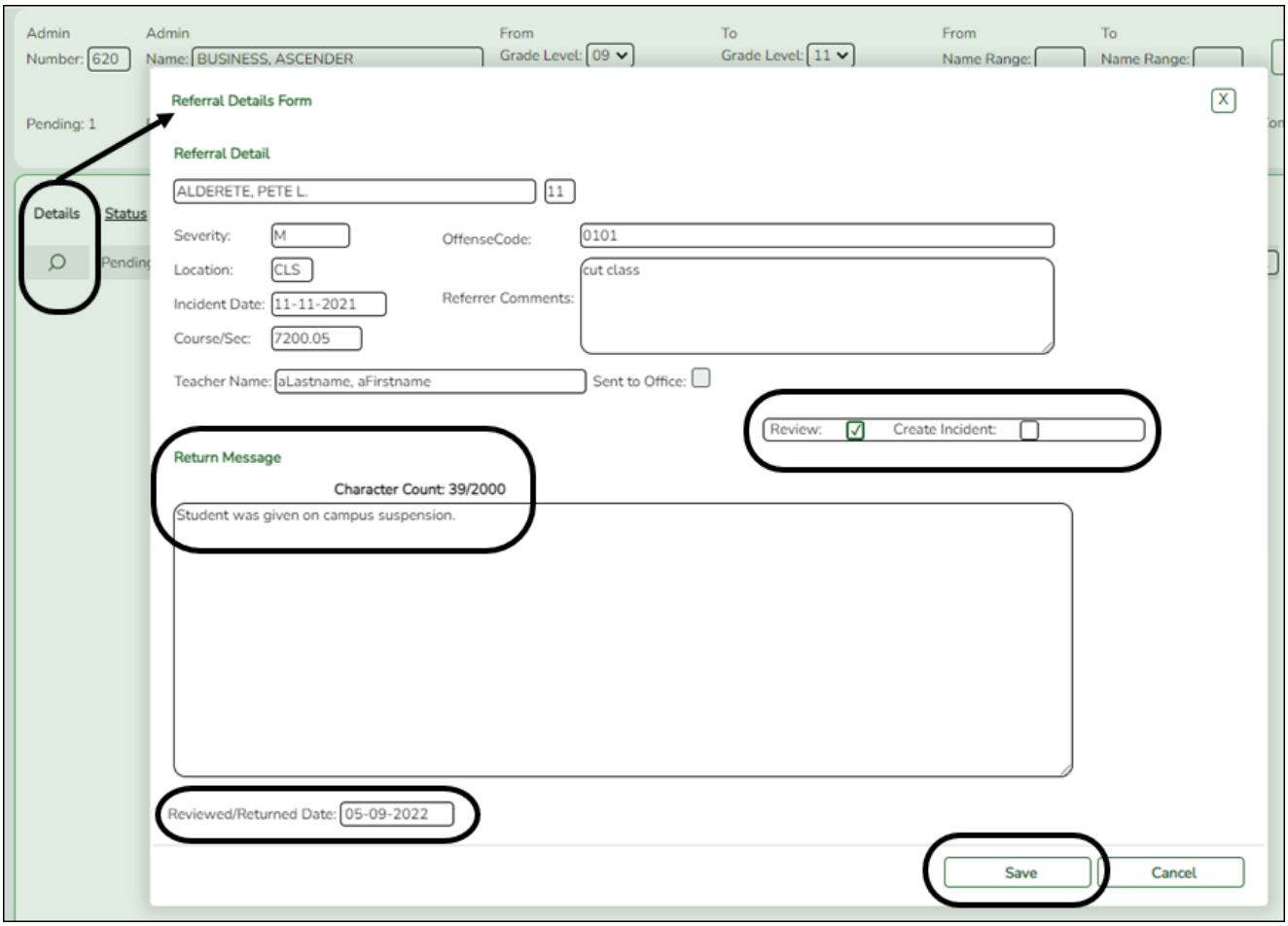


- In the **Referral Detail** section, the information entered by the submitter is displayed and cannot be changed.
- The fields below **Referral Detail** are for approver use.

Close a referral if no action needed:

Each submitted referral must be reviewed, although some referrals will require no additional disciplinary action. If no further action is needed, you can type comments regarding your decision,

and change the status of the referral to **Reviewed**.



❑ Select **Review** if you have reviewed the referral and are taking no further action.

❑ You should type comments under **Return Message** explaining your decision, up to 2000 characters, although the field is not required.

❑ (Required) In the **Reviewed/Returned Date** field, type the date on which the referral was reviewed.

❑ Click **Save**.

The window closes, and the Referrals page remains displayed. The status of the referral changes to **Reviewed**, and the grid is re-sorted by status, accordingly.

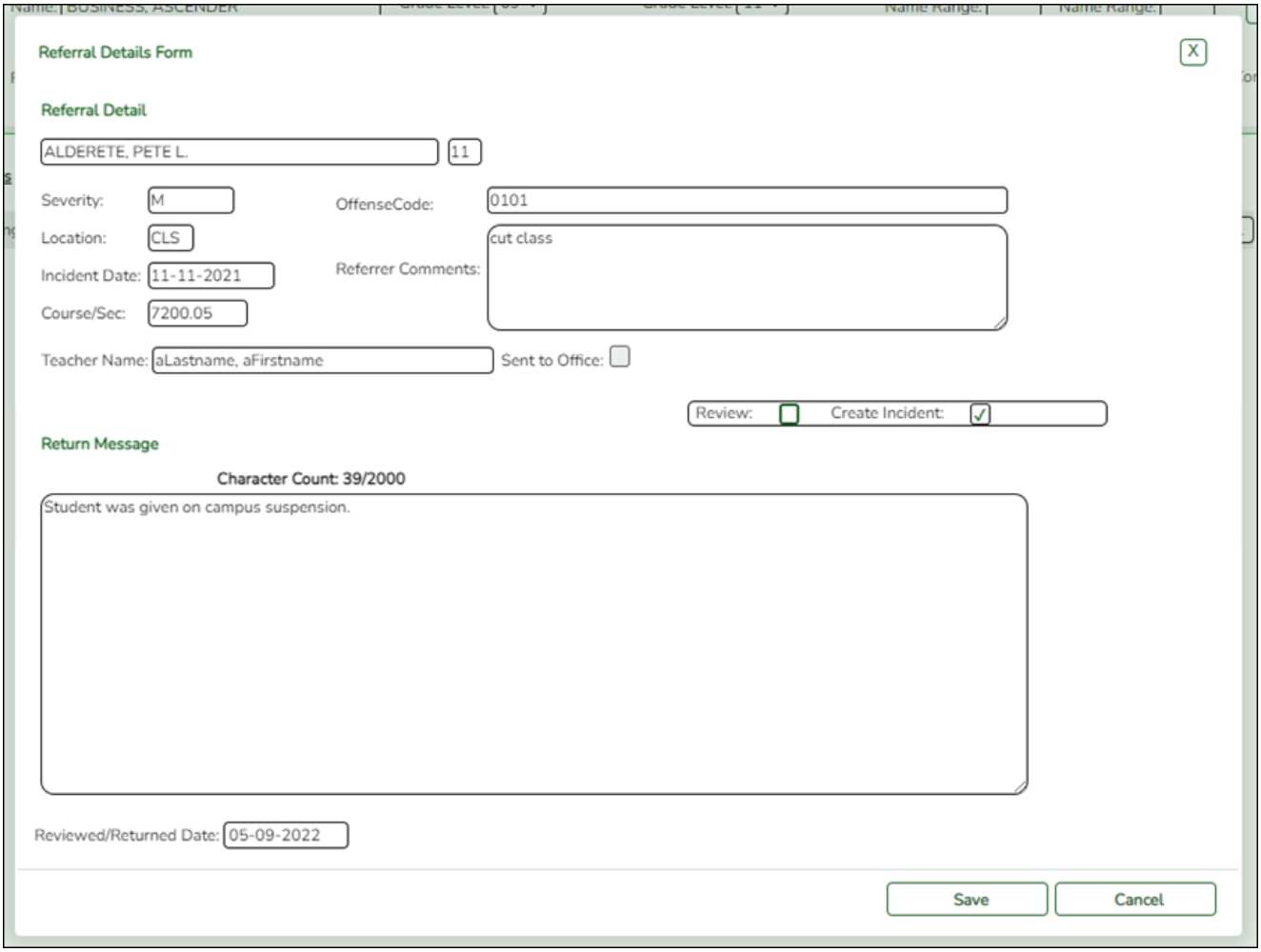
NOTE:

- The **Save** button is not enabled until **Review** (or **Create Incident**) is selected.
- You can return to this referral at any time and create an incident if necessary.

Create an incident record if needed:

Some submitted referrals require that you take further disciplinary action. To escalate the referral and carry out disciplinary action, you must create an incident record. If multiple students were involved, the students can all be linked to the same incident by incident number.

❑ From the Referrals page, click to view the referral.



❑ Select **Create Incident**.

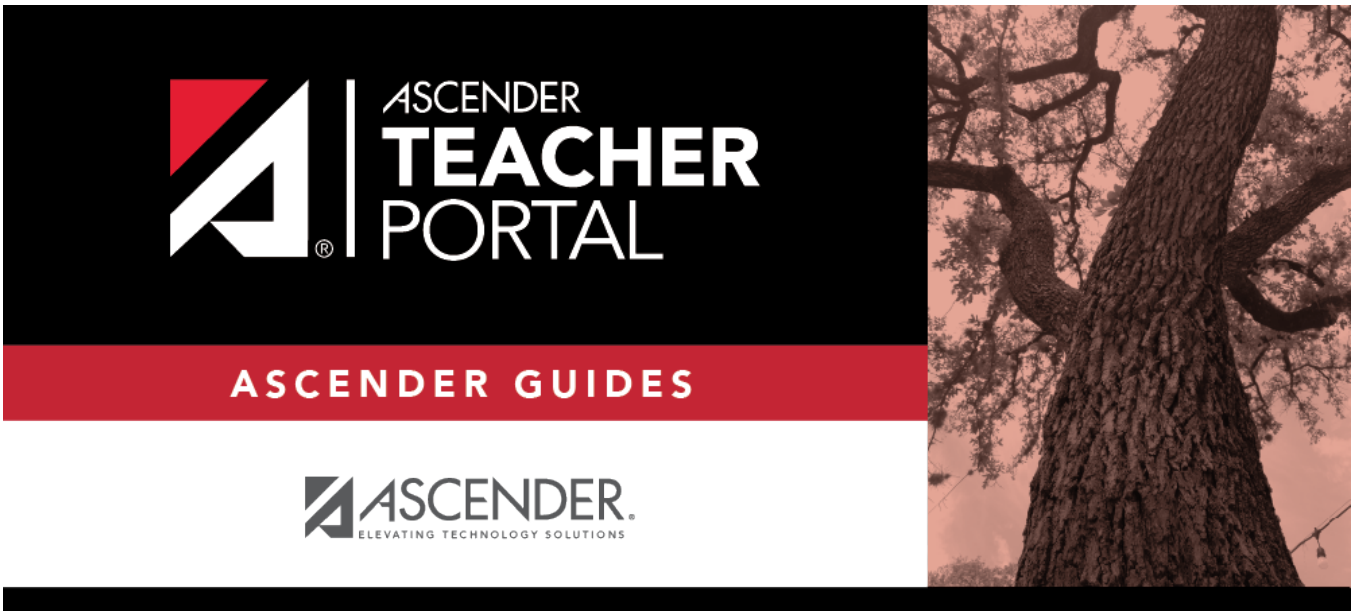
❑ Type comments under **Return Message** explaining your decision, up to 2000 characters.

❑ Click **Save**.

The window closes, and the the Discipline Maintenance tab opens allowing you to add data for all involved students, such as offense and action codes, and save the incident record. The status of the referral changes to **Reviewed**, and the grid is re-sorted by status, accordingly.

See Online Help for additional instruction on using the Discipline Maintenance tab.

NOTE: The **Save** button is not enabled until **Review** or **Create Incident** is selected.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