How to - add a To-Do or Referral for a student

Referrals and To Dos can be added for one student or many students at once, if the user adding the referral has permissions to create referrals for the selected students. When creating a referral, use the comments field to include details about the referral. Why is the student being referred? Does the provider have any recommendations for the student in relation to the referral?

Select the students and type of item to be added

A referral or To Do can be added for a student from the Student list, or from the individual's Student Folder.

To create a referral or To-Do for one or more students from the student's list

1. Find the student(s) in the Students list on either the My Students or Tracking tabs. You must have permission to assign the desired tracking item to all of the selected students to use this method.
2. Select the check box to the left of the desired students' names.
3. Click the Refer or Create To-Do button from the tool bar.

If you do not have permission to raise the type of tracking item you chose for ALL of the students you selected (or permission to raise the same item for all students you selected), you will receive an error message as shown below:
To create a referral or To-Do for one student from the Student Folder

1. Find the student in the Students list
2. Click on the student's name. This opens the
3. Click the Referral or To-Do button from the 'Add' button bar.

If you do not have permission to create a referral or to-do for the student whose folder you opened, the buttons will not be displayed.

Provide details for the tracking item and save it
After you click the Referral or To-Do button, the Create window for the item is displayed.
1. **Select item:** Select which item you are creating in the **Referral** or **To-Do** drop down box. Options will be based on the role/relationship you have with the selected students. Additional fields may be included/excluded based on the selected item.

2. **Due Date:** Depending on the item, you may be able to include a **Due Date** to give the student a deadline for the item.

3. **Course Context:** If relevant, you may select a **Course Context** related to the referral or To Do (for example Tutoring related to a specific class).

4. **Assignee:** If you have permission to assign this item to a team member, the **Assignee** field will be displayed. You can leave the item unassigned or select someone to be the owner of the item.

5. **Comment:** In the **Comment** box, provide specific guidance related to this item. Typically this would be information for the student. To determine whether or not the student will be able to view these comments, check the line labeled **Student View:** in the light blue box beneath the **Comment** box. If this item is visible to the student(s) provide comments that will personalize the request and ensure the student understands what is expected.

The notes you enter in the comment box will also be visible to those with a role/relationship to the student listed under the **Permissions:** heading in the light blue box under the **Comment** box. The comment will be available within the student folder, both associated with the item on the **Tracking** tab, and on the **Notes** tab.

6. Click the **Save** button to create your to-do or referral.

**DRAKE STATE’S STARFISH REFERRALS:**

**TUTORING**

**COUNSELING SERVICES**

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