



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.

The screenshot shows a software interface with two tabs: 'MY STUDENTS' and 'TRACKING'. The 'TRACKING' tab is active. In the toolbar, there are two buttons: 'Referral' and 'To-Do'. Below the toolbar is a search bar with 'Student Name, Userna' and a 'Go' button. There are also dropdown menus for 'View' (set to 'Custom') and 'Connection' (set to 'Student Services ...'). The main area is a table with columns: Student, Item Name, Status, and Created. The table contains six rows of student data. The first three rows are selected, indicated by checked checkboxes in the left margin.

<input type="checkbox"/>	Student	Item Name	Status	Created
<input checked="" type="checkbox"/>	Didwin, Andrew SF3154937	General Concern	Active	Yesterday by Gold, Yasmin
<input checked="" type="checkbox"/>	Blbben, Margaret SF3158141	General Concern	Active	Yesterday by Gold, Yasmin
<input checked="" type="checkbox"/>	Catton, Elizabeth SF3158490	General Concern	Active	Yesterday by Gold, Yasmin
<input type="checkbox"/>	Coomas, Jason SF3159215	General Concern	Active	Yesterday by Gold, Yasmin
<input type="checkbox"/>	BrSisk, Samantha SF3159527	General Concern	Active	Yesterday by Gold, Yasmin
<input type="checkbox"/>	BoLane, Jessica SF3159560	General Concern	Active	Yesterday by Gold, Yasmin

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:

The screenshot shows an error message dialog box with a dark header and a light body. The header contains a star icon, the text 'Cannot Perform Action on Selected Students', and a close button (X). The body contains the text 'You do not have permissions to create any items of this type for the selected students.' and an 'OK' button at the bottom.

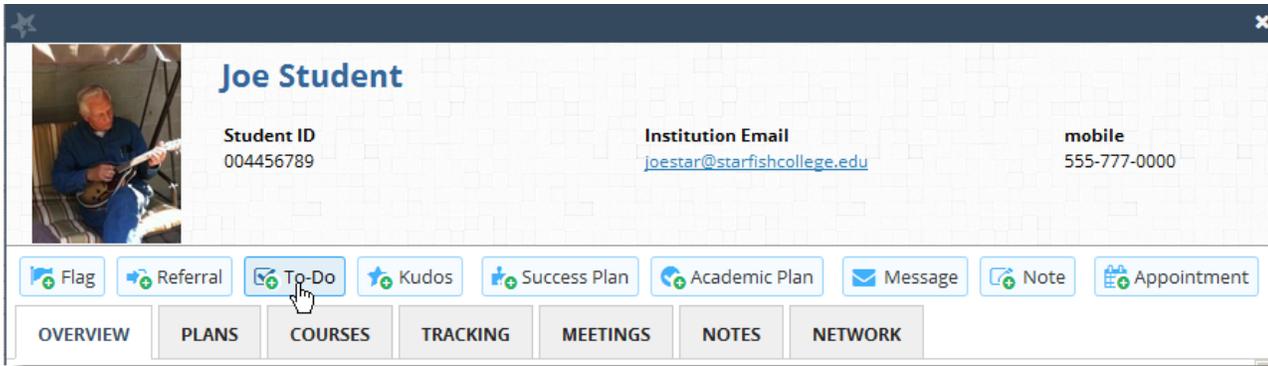
Cannot Perform Action on Selected Students

You do not have permissions to create any items of this type for the selected students.

OK

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.

A screenshot of the 'Create Referral for Multiple Students' form. The form has a title bar with 'Create Referral for Multiple Students' and two buttons: 'Never Mind' and 'Save'. The form is divided into several sections. The 'Referral' section has a dropdown menu with 'Career Services Referral' selected. Below this, there is a list of options: 'Career Services Referral' (selected), 'Refer a student to Career Services. Email sent to Student', and 'Select a Course...'. The 'Due Date' section is empty. The 'Course Context' section has a dropdown menu with 'Select a Course...' selected. The 'Assignee' section has three radio buttons: 'Unassigned' (selected), 'Me', and 'Other Provider'. Below these is a dropdown menu. The 'Comment' section has a text area with the placeholder text 'Add comments indicating why the tracking item is being created.' At the bottom of the form, there is a 'Student View' section with a lock icon and the text 'The student can view this item and the notes entered above.' Below this is a 'Permissions' section with a lock icon and the text 'People with the following roles may be able to see this tracking item if they have a relationship with the student(s):'. There are two roles listed: 'Student Services Leadership' and 'Primary Advisor'. At the bottom right of the form, there are two buttons: 'Never Mind' and 'Save'. A mouse cursor is pointing at the 'Save' button.

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

DISABILITY SUPPORT SERVICES

