Behavior Referral

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Classic View: Behavior > Behavior Referral

Search Terms: Behavior Referral

The Behavior Referral Form allows school staff members to complete an online referral for a student behavior event and submit it to a staff member responsible for managing behavior for further action. Email notifications are sent to the email address entered on the person's Demographic record.

This article describes how to:

- Modify an existing referral or create a new one.
- Enter Incident-level referral information.
- Attach events to an incident.
- Designate participants in an event.
- Add a response to a behavior incident related to crisis intervention.
- Save a referral as a draft or submit it to the Behavior Management tool.
- Manage any files that are attached to the Behavior Referral.

A Behavior Referral is made up of two parts: **Incident Information**, which provides the general information about the behavior incident, and **Events** **and** **Participants**, which describes the individual events within the incident and the participants in each event. Information entered in these areas is viewable in the student's Behavior tool as described below:

Area	Where Information Displays
Incident Information	Viewable for all participants.
Event Information	Viewable for all participants in that event.
Participant Information	Only viewable for that participant.

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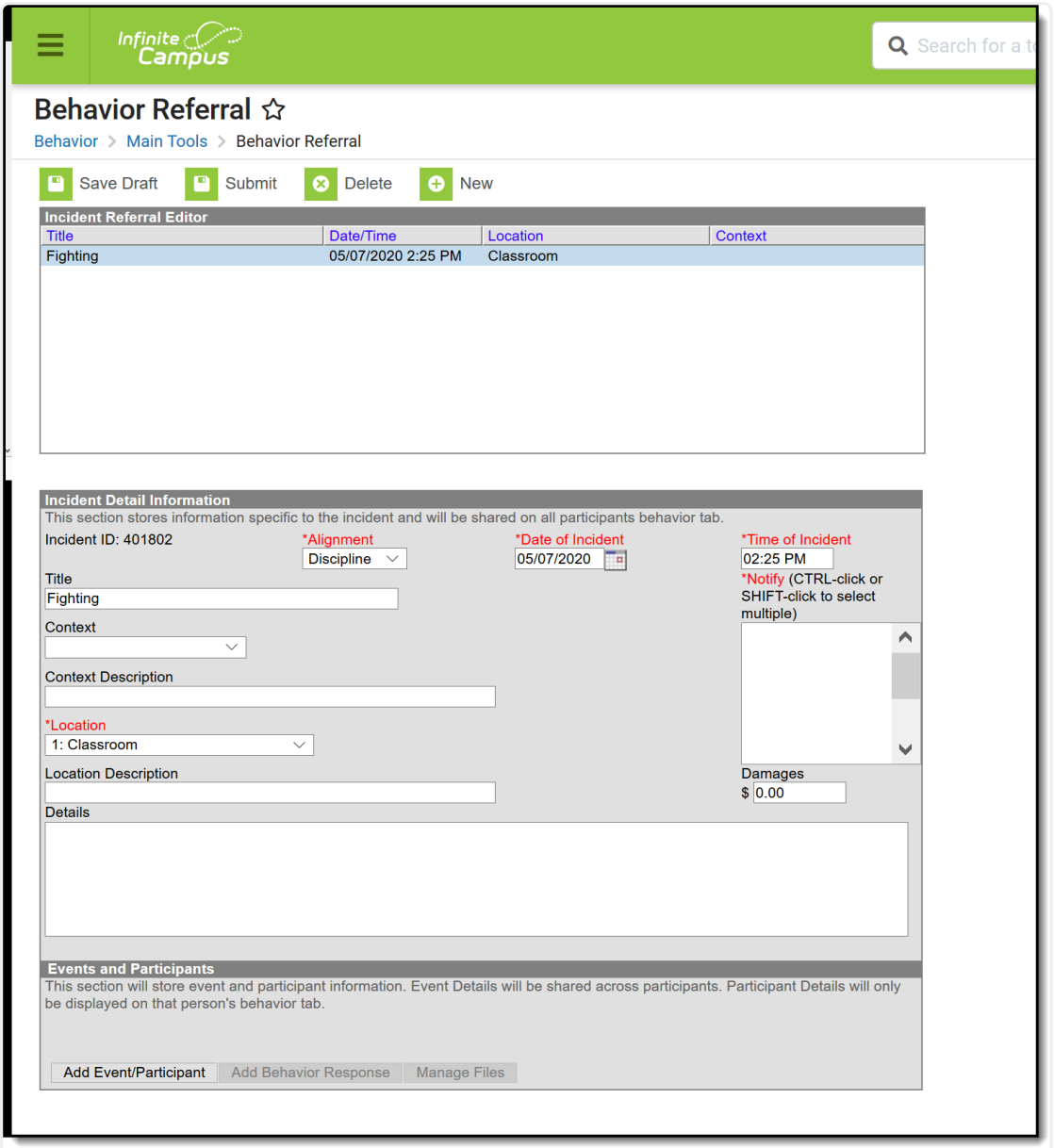

Behavior Referral

Tool Rights for Behavior Referral

Users must have at least **RWA** rights to **Behavior >Behavior Referral**. **RWAD** rights allow full access to the tool.

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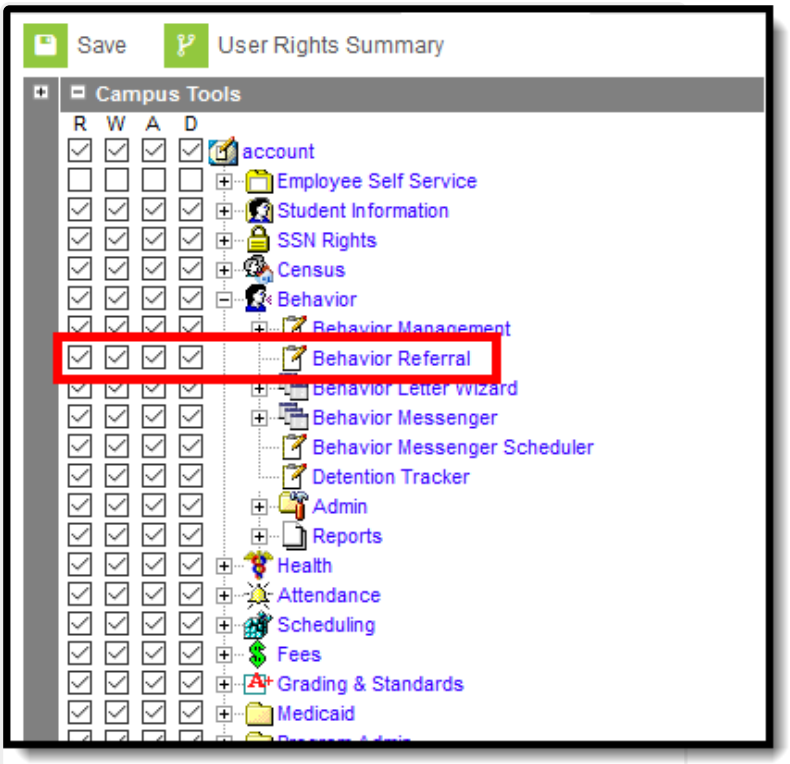

Behavior Referral Tool Rights

Behavior Preferences Related to Referrals

A Behavior Preference is available that **automatically notifies administrators when a referral is submitted**. Users are listed for selection when their District Assignments record has the **Staff** checkbox marked. Individuals selected here are automatically selected in the Notify field on the Referral. Additional individuals can be selected on the Referral editor if necessary.

When a referral is submitted, a Process Alerts message and email are sent to the individuals selected in the Notify field. The email is only sent if the recipient has an email address and has Staff checkbox marked in the Demographics tool.

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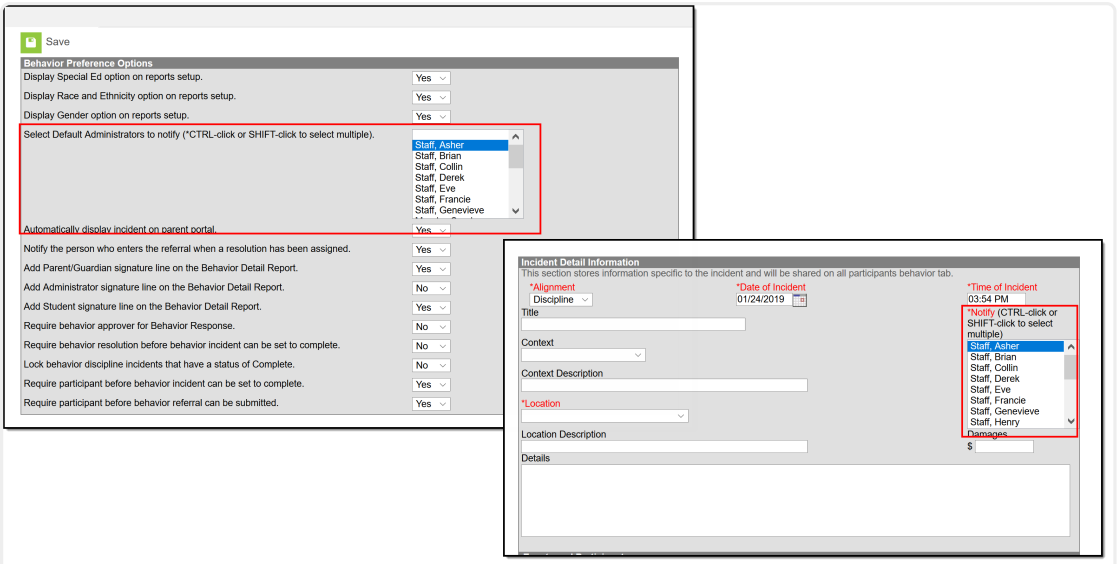
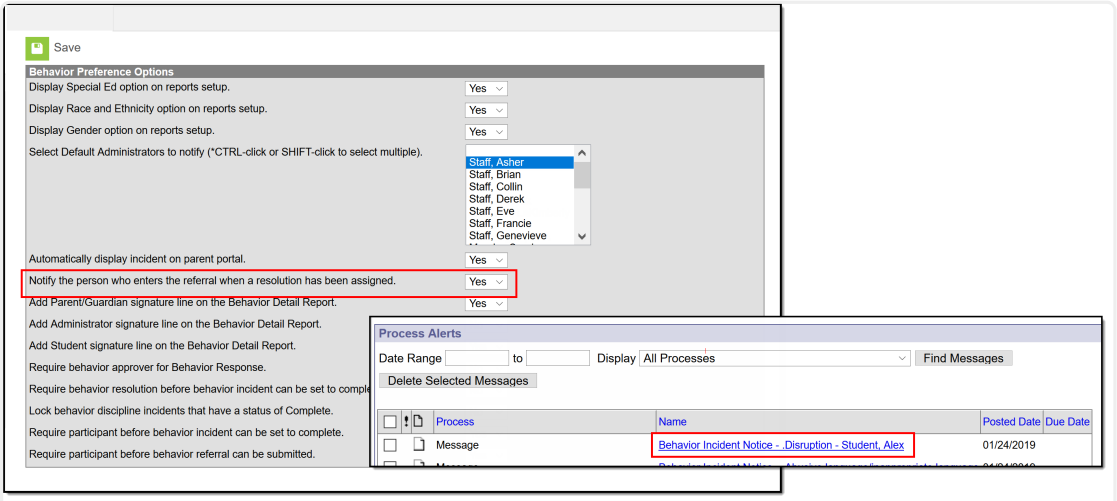


Auto-Selection of Administrators to Notify

A Behavior Preference is available that **notifies the person who enters the referral when a resolution has been assigned.** When this preference is set to Yes, both a Process Alerts message and an email are sent to the person who submitted the referral. The email is only be sent if the recipient has an email address and has Staff checkbox marked in the Demographics tool.

- Messages are sent ONLY when this preference is set to Yes.
- Only one message is sent, regardless of the amount of resolutions associated with the event.
- If an incident is marked Complete and no resolutions are entered, a message is not sent.
- If an incident moves from Complete to In-Progress and back to Complete, a message is sent (unless there are no resolutions).



Process Alert Message when Behavior Resolution Assigned

A Behavior Preference is available that **requires a participant to be assigned to the behavior referral before it can be** submitted.

- When this preference is set to **Yes,** at least one person (student, staff, etc.) needs to be assigned as a participant of the event before the referral can be submitted for further

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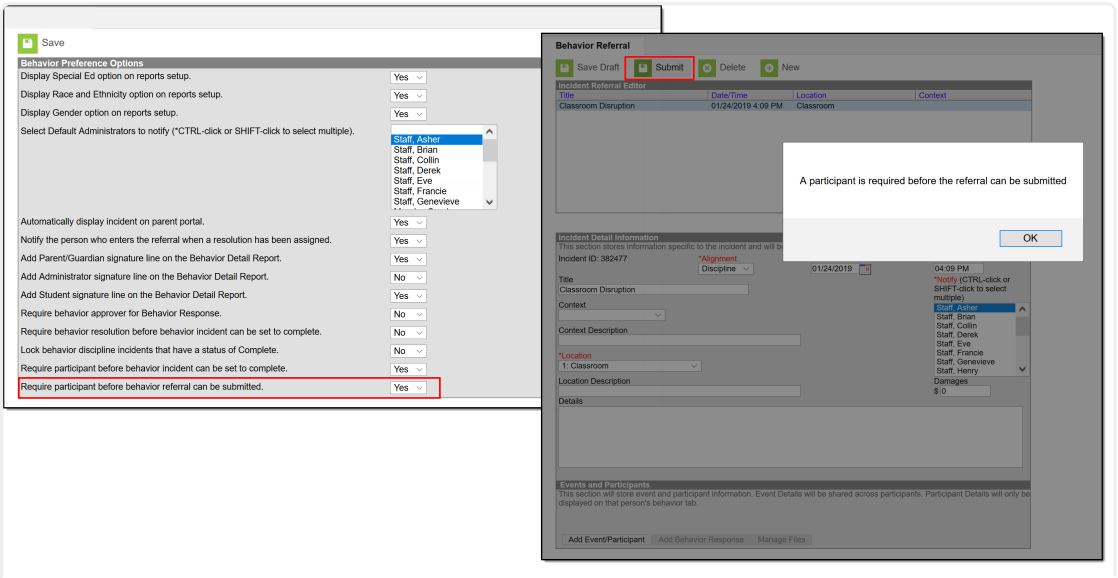
processing (additional event information, assignment of resolution, etc.). When the referral is submitted and a participant has not been associated with it, a message displays indicating it cannot be submitted until a participant is assigned (see image below).
- When this preference is set to **No**, or when it is set to **Yes** and a person has been assigned as a participant, the referral can be submitted without error.



Participant Required before Submitting Referral

Create a Behavior Referral

First, click **New** to open a new Referral and enter information for the incident as a whole in the Incident Detail Information.

Refer to the following Incident, Event and Resolution sections for descriptions of each field in the referral.

- Enter information in the referral as needed based on these descriptions. Fields may vary by state.
- At any point while creating a referral, clicking **Save Draft** for the referral or Event/Participant editor saves the entered information in draft status.
- Clicking **Submit** submits the referral with any entered information. The incident is no longer available in the referral tool.

A Process Inbox message is sent to the individuals selected in the **Notify** field, and the incident is available through the Behavior Management tool for the calendar selected in the Campus toolbar when entering the Referral. An email is also sent to those individuals marked as Behavior Admins on their District Assignment record.

When a referral is submitted, a Process Alerts message and email are sent to the individuals selected in the Notify field. The email is only sent if the recipient has an email address and has Staff checkbox marked in the Demographics tool.

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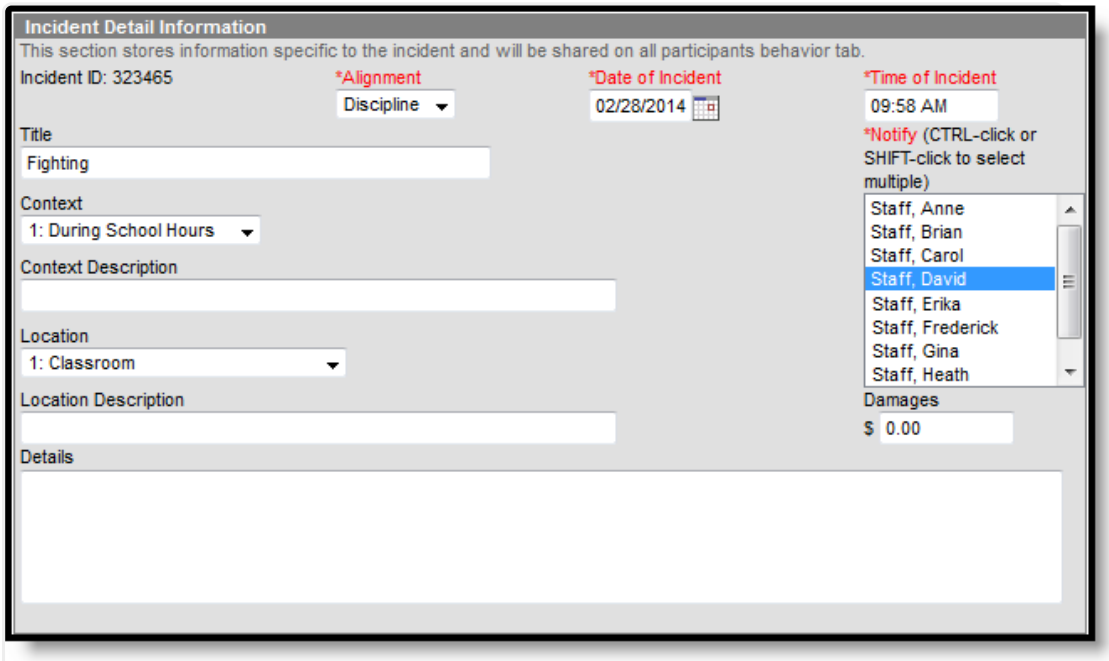
When a resolution is entered for a referral and the incident is then marked as complete, if the preference to "Notify the person who enters the referral when a resolution has been assigned." is set to Yes, then both a Process Alerts message and email are sent to the person who submitted the referral. The email is only be sent if the recipient has an email address and has the Staff checkbox marked in the Demographics tool.

- Messages are sent ONLY if the **Notify the person who enters the referral when a resolution has been assigned** is set to Yes.
- Only one message is sent, regardless of the amount of resolutions associated with the event.
- If an incident is marked Complete and no resolutions are entered, a message is not sent.
- If an incident moves from Complete to In-Progress and back to Complete, a message is sent (unless there are no resolutions).

Incident Information



Behavior Referral Incident Information

Field	Description
Incident ID	The unique identification number assigned to the incident once the referral is saved. This field cannot be edited.
Alignment *Required*	Indicates if the incident is related to Discipline (Negative) or Award (Positive).

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Field	Description
Date of Incident *Required*	The date the incident takes place. Defaults to the date the referral is created.
Time of Incident *Required*	The time the incident takes place. Defaults to the time the referral is created.
Title	A brief description of the incident. If no title is entered for the incident, the Event Type Name(s) populates as the incident name.
Context	Indication of the setting or time of day the incident took place.
Context Description	Additional information about the context of the incident.
Location	Where the incident took place.
Location Description	Additional information about the location of the incident.
Notify *Required*	Once the referral is submitted, a message is sent to the process inbox of the individual(s) selected. This list of individuals is populated with those staff members who have the **Behavior Admin** checkbox marked on their District Assignments record. Also note that there is a **Staff** checkbox in the Messenger Contact Preferences on the Demographics tool. When that checkbox is marked, behavior referrals are sent to the desired messenger delivery devise. In Behavior Preferences, select a set of users to notify of new referrals automatically.
Damages	The total cost of all damages that occurred as a result of the incident.
Details	Any additional information about the incident, including a description of what occurred.

Fields in red text indicated by an asterisk are required and must be entered before the record can be submitted. Once general incident information has been established, add **Events** to describe the individual occurrences and the **Participants** in each event.

Delete a Behavior Referral

To delete a referral, click the **Delete** button in the action bar. The incident is removed, along with all event, participant, response and resolution information within this tool and elsewhere. Submitted referrals cannot be deleted from the Behavior Referral tool.

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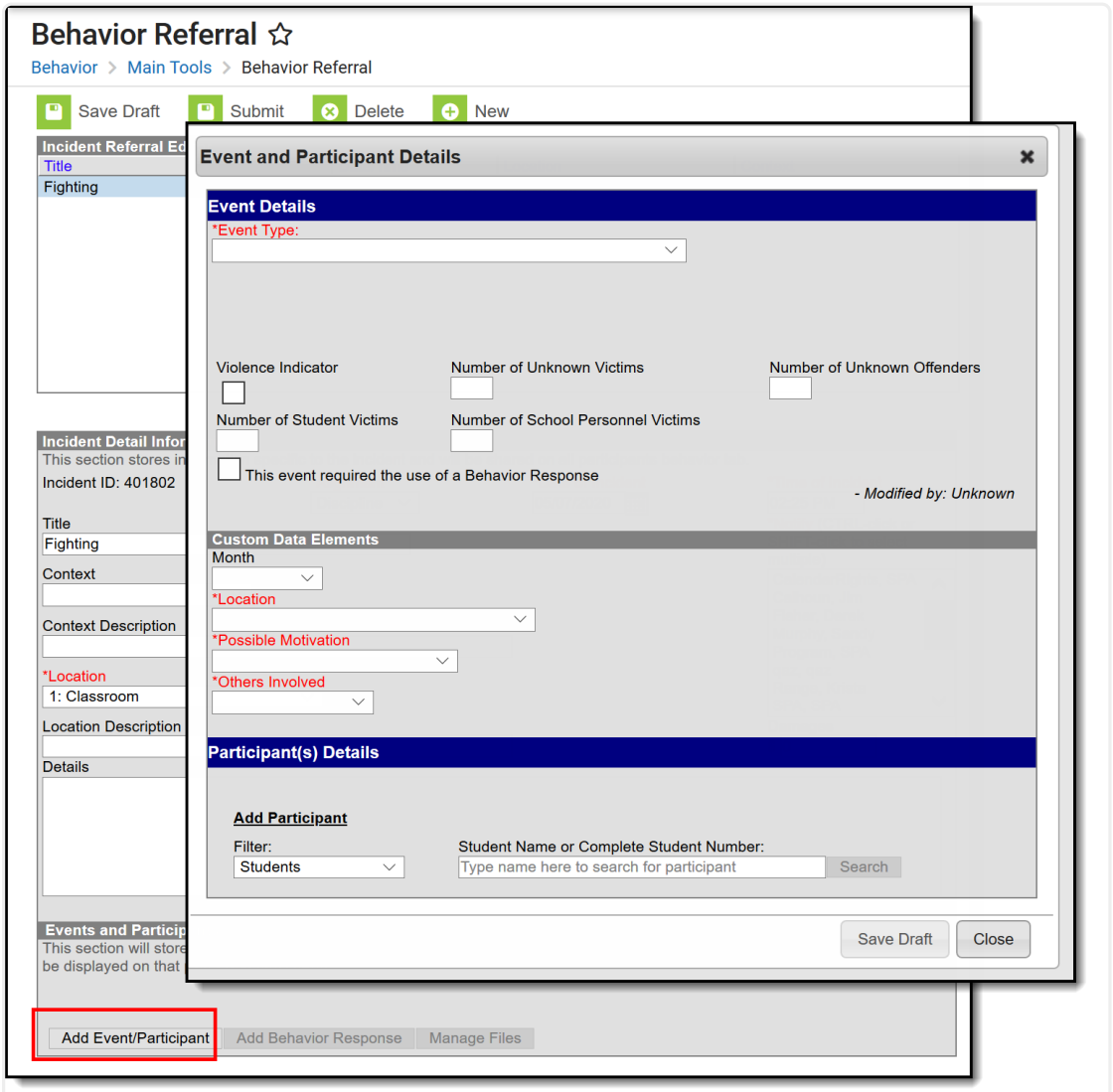
Add Events and Participants to Saved Behavior Referrals

Event Information

After the incident has been created, the entry can be **Saved as Draft**, or continue with adding event and participant information.



Event Information

Enter information about the event as described in the following table. Options may differ by state.

Field	Description

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Field	Description
Event Type *Required*	The identifying code and name of the event, sorted alphabetically by name. Event types are created in the Behavior Settings area and can be mapped to State Event Codes. Options are dependent on the Alignment selected for the Incident; only Event Types with the same alignment are available.
Demerits/Points	Indicates a mark of poor conduct for a discipline event or a mark of positive action for an award event. This field displays the value entered for the Event Type.
State Code	The State Event Code to which the event is mapped. This information is used in report behavior events to the state. This field displays the value entered for the Event Type.
Category	Indicates whether the event is considered to be *Minor*, *Serious* or *Extreme*. This field displays the value entered for the Event Type.
Weapon	Indicates whether a weapon was used in the event.
Violence Indicator	When marked, indicates the student showed extreme violence in the event.
This event requires the use of a Behavior Response	When marked, indicates a crisis intervention was necessary. Marking this also allows the entry of a Behavior Response to describe what that intervention was.

Additional events with distinct or repeated participants can be added to an incident. Click **Save Draft** and then **Add Event/Participant**. There is no limit to the number of events that can be added to an incident.

To modify an event, click the hyperlinked Event Type, make the desired modification and click **Save**. To delete an event from the incident, click the hyperlinked Event Type and click **Delete**. Deleting an event also removes the associated participants' roles from the incident.

Participant Information

Participants are attached to individual events since participants may be involved in multiple events in different capacities such as a student involved in a fight who was also found in possession of drugs.

To attach a participant to an event, **Search** for at least the first two characters of the **Participant Name** or a **Student Number** (or staff number). Search results can be **Filtered** to include *Students* (active enrollment), *School Employees* (active district assignment) and *All People* (Person record in Census).

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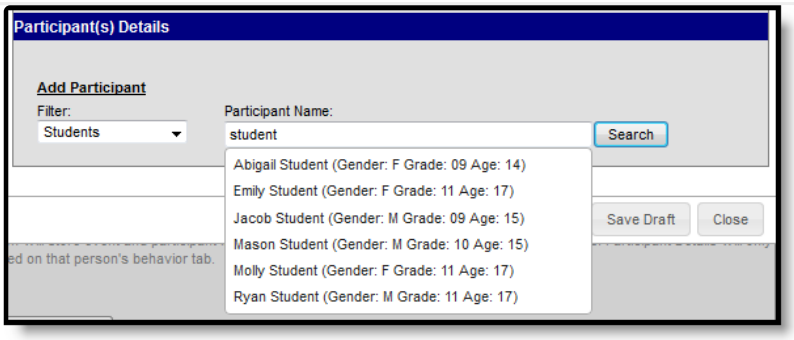
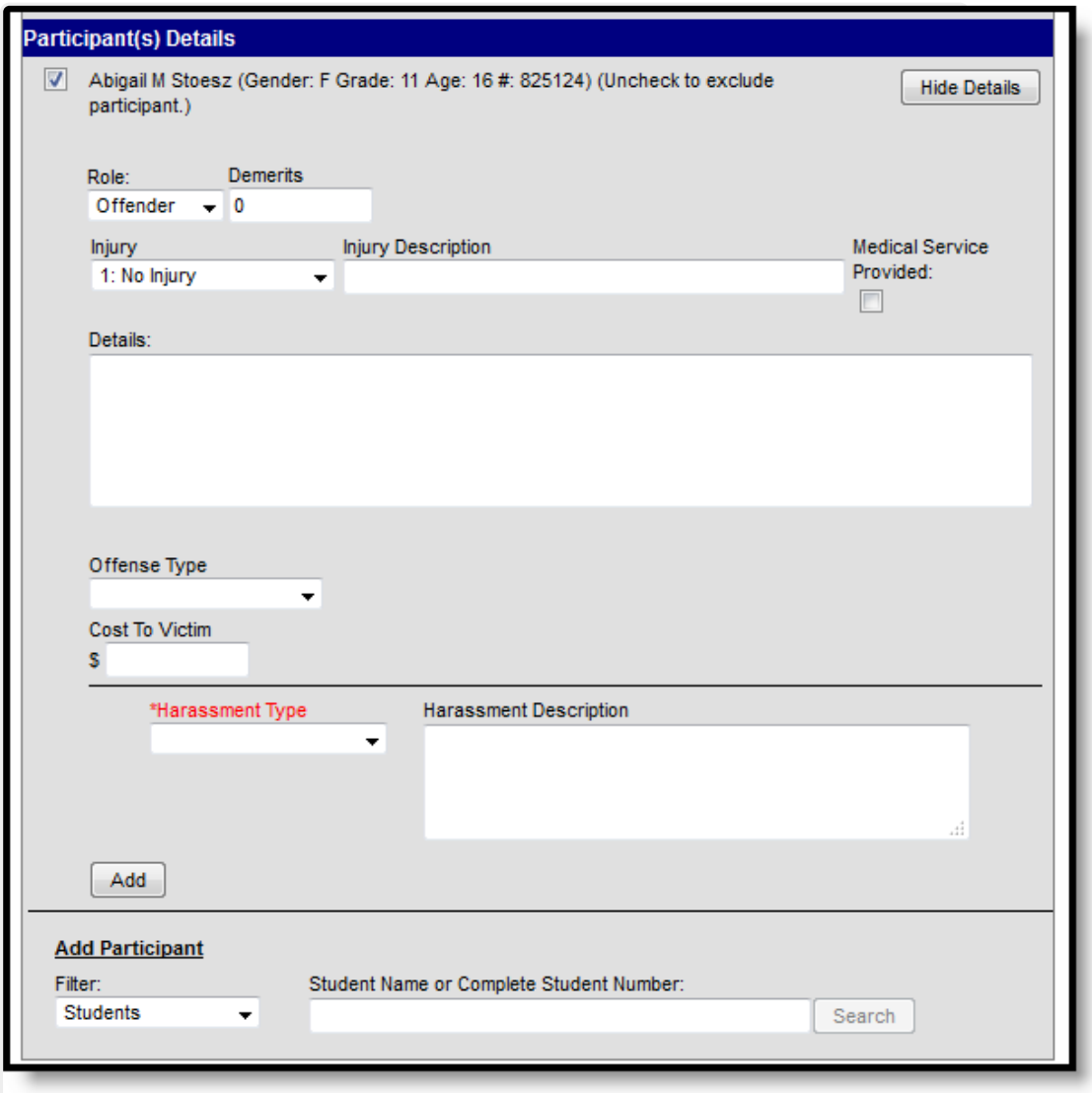


Participant Name Search Results

Student names are followed by the student's Gender, Grade and Age. School Employees includes Gender and Title. All People only includes Gender. Results include the student's middle initial and student number.

Click the participant's name to add the individual to the event. Participant details open for the individual.



Participant Details

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Enter participant details based on the following table. Options may differ by state.

Field	Description
Role	The way in which the individual participated in the event, as an *Offender*, a *Participant*, a *Victim* or a *Witness*. For Award incidents, the available role is *Recipient*.
Demerits/Points	Indicates a mark of poor conduct for a discipline event or a mark of positive action for an award event.
Injury	Indicates if the participant received an injury as a result of the event.
Injury Description	Additional information about the student's injury.
Medical Service Provided	Indicates if medical service was provided to the individual as a result of the event.
Details	Additional information about the individual's participation in the event.
Drug Fields These fields appear only when the selected event type has the Drug Classification field selected.	
Drug Type	Indicates the type of drug the student had in his/her possession. This is a core set of drug types; localized options may be available.
Drug Description	Provides detailed information about the drug violation.
Harassment Fields These fields appear only when the the selected event type has the Harassment Classification field selected.	
Harassment Type	Indicates the type of harassment the student performed. This list contains the types reported in the Civil Right Data Collection.
Harassment Description	Provides detailed information about the harassment violation.
Weapons Fields These fields appear only when the selected event type has the Weapon Classification field selected.	
Weapons Type	Indicates the type of weapon the student had in his/her possession. This is a core set of drug types; localized options may be available.
Weapons Description	Provides detailed information about the weapon violation.

Additional participants can be added by searching for a name and selecting the participants. A participant can only be searched for and added to an event once. Participant details can be condensed by clicking the **Hide Details** button. There is no limit to the number of participants that can be added to an event.

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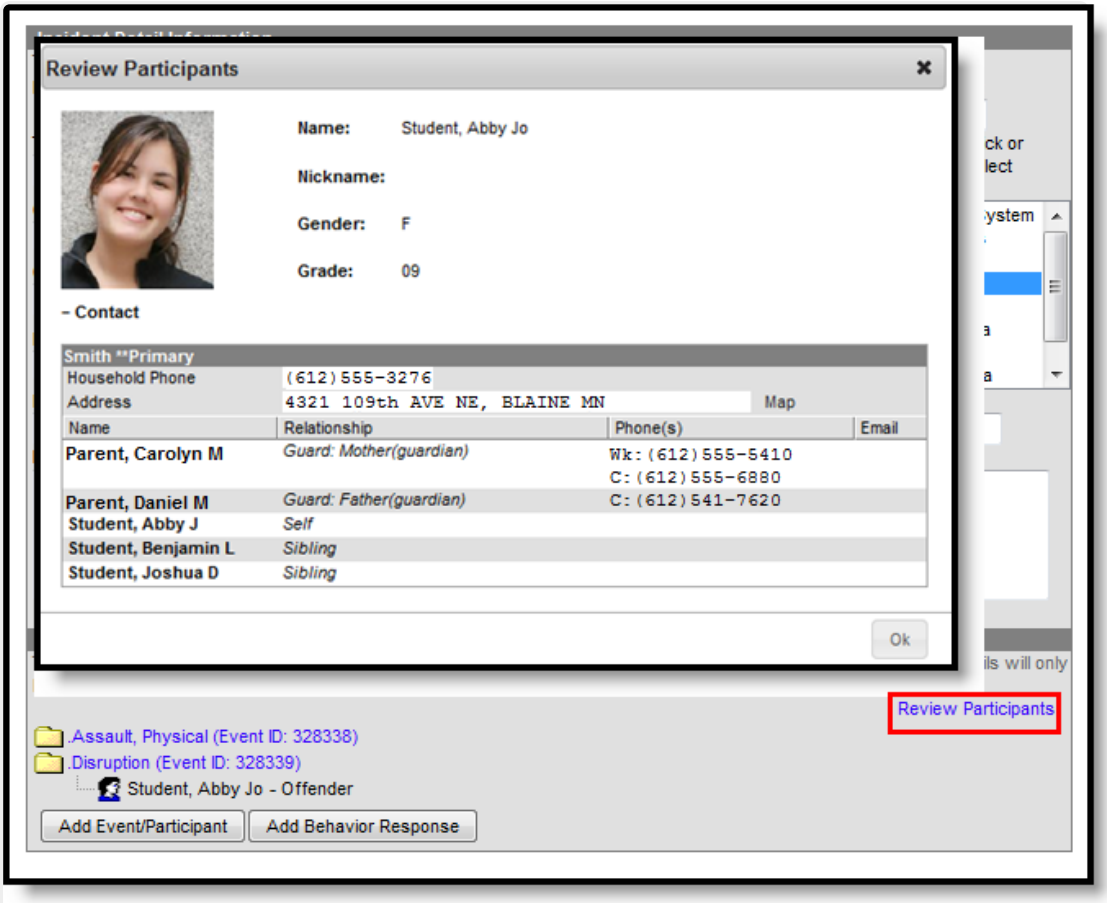
To remove a participant, remove the check mark from the checkbox next to the participant's name. The participant is removed when the event is saved.

When adding participants to any events after the first one recorded, participants of other events in the incident is automatically be available for selection. Mark the checkbox next to the participant's name to include them in the event.

Once Event and participant details have been entered, click **Save Draft** to save the event and keep the referral in draft status. To submit a referral, click the **Submit** button on the referral. Once a referral is submitted, it cannot be modified in the Referral tool. A Process Inbox message is sent to the individuals indicated in the **Notify** field and the incident is available through the Behavior Management tool for the calendar selected in the Campus toolbar when entering the Referral.

The **Review Participants** hyperlink displays a list of all participants, basic demographic information and parent/guardian contact information.



Review Participant Details

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Add a Behavior Response

A Behavior Response is added to an event when a staff person needs to administer a restraint on the student, following recommended training and guidelines. This option is available for selection when:

- The incident alignment is a discipline event.
- At least one Response Type has been created.
- At least one Behavior Event has been created.
- At least one participant has been added to the event.

In addition, the following also needs to be completed before adding a behavior response:

- At least one staff person at the school building needs to be designated as a **Behavior Response Approver** on their District Assignment record (optional).
- At least one staff person at the school building needs to have an active Crisis Intervention Credential (optional).
- Response Types need to be created in the Behavior Admin toolset.

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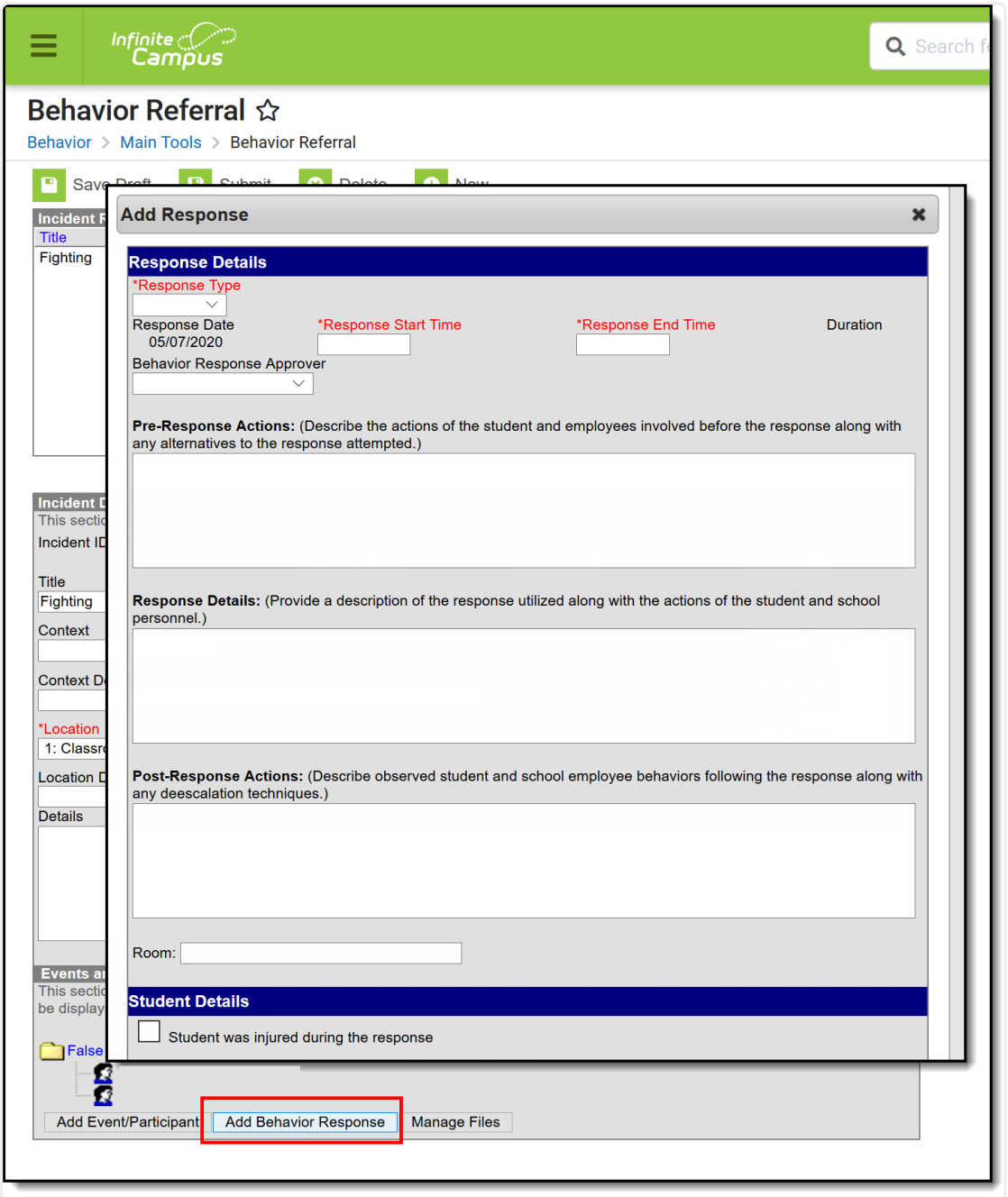

Adding a Behavior Response

If a Behavior Incident has been marked to include a Behavior Response but it has not been entered, the Event and Participant editor displays an orange icon indicating the behavior response information is missing.

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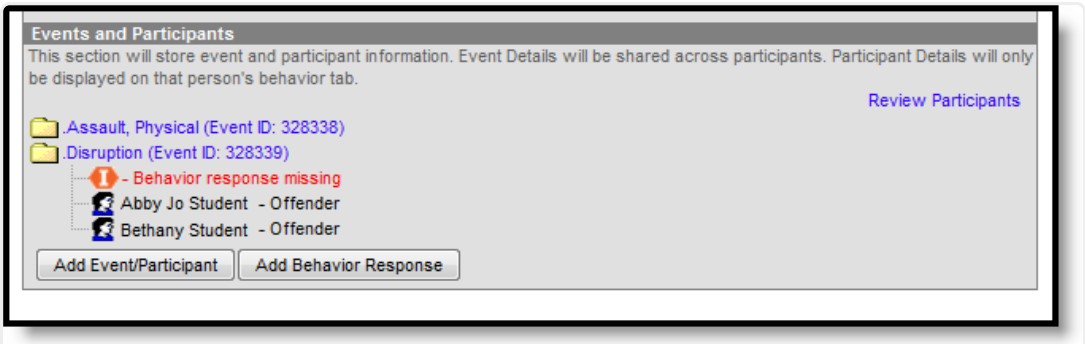

Behavior Response Missing Indicator

Behavior Response Editor

Field	Description
Response Details	
Response Type *Required*	Indicates the type of response that was given. These options are based on the active Response Types entered in the Behavior Admin tool.
Response Date *Required*	Entered date reflects when the response occurred. This date automatically displays the date the incident occurred and cannot be modified.
Response Start Time *Required*	Entered time (in HH:MM format) indicates when the staff person began administering the response. The start time of the response must be after the start time of the behavior incident.
Response End Time *Required*	Entered time (in HH:MM format) indicates when the staff person stopped administering the response. The end time of the response must be after the start time of the response.
Duration	This field auto-calculates based on the entered start and end time.
Behavior Response Approver	Indicates the person authorizing the use of the response. This field populates with staff members who have the **Behavior Response Approver** checkbox marked on their District Assignment record.
Pre-Response Actions	Text entered here describes the actions performed by the staff and student before the response was administered.
Response Details	Text entered here describes the details of the response.

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Field	Description
Post-Response Actions	Text entered here describes the actions performed by the staff and student after the response was administered.
Room	Indicates where the response occurred.
Student Details	
Student was injured from the response	If the student assigned to the event was injured as part of the response, mark this checkbox.
Describe any injuries to the student *Required*	When the above checkbox is marked, this comment field displays. Details entered here should reflect the injuries the student experienced.
Apply To *Required*	Indicates the student who received the behavior response. If more than one student is involved in the event, only one student can be selected on the response editor.
Guardian Contacted	Indicates the student's parent/guardian was contacted as a result of the response. When marked, the following four fields displays: • Date • Time • Contact • Details
Date	Entered date reflects when the guardian was contacted. This field defaults to the current date. Dates are entered in *mmddyy* format, but can be modified by clicking the calendar icon.
Time	Entered time reflects when the guardian was contacted. Time is entered in HH:MM format.
Contact	Indicates the name of the guardian who was contacted.
Details	Provides a description of what was discussed when the guardian was contacted.
Participant Details	
Name	Displays the name of the staff person involved in the response, as determined by the name selected in the Behavior Response Approver field.

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Field	Description
Role	Select the type of position the staff person had in the response. • PL: Primary/Lead • SC: Secondary • OB: Observer
Participant was injured during the response	If the staff person was injured, mark this checkbox.
Describe any injuries to the participant *Required*	When the above checkbox is marked, this comment field displays. Details entered here should reflect the injuries the staff person experienced.
Add Participant	Enter the start or all of another person's name, and search, to add that individual to the response. • Use the Filter options to search only for the selected type of person - Students (other persons who have an enrollment record), School Employees (persons who have a district assignment record, or All People (persons who have a Campus Census record). • Enter the name of the participant (or part of the name) into the search field and click the Search button. Matching results display in a dropdown list of the search results. Choose the appropriate person. • Complete the addition of the participant by selecting the Role and indicating whether the person was injured (defined above). • Add additional participants as needed. If another student is added as a participant, make sure that student is added to the event as a witness or other participant. This way, that student has a behavior event on their behavior tool and the school can track any injuries or other results of the event accordingly. In some situations, the Participant may be another student who is not involved in the incident, but is observing the response/seclusion in order to meet a district requirement.

Manage Files Attached to Behavior Events and Participants

Images, documents, videos, etc. can be associated with a particular student involved in a behavior event, or associated with a particular behavior event. The district MUST be using Campus Digital Repository in order to use this feature.

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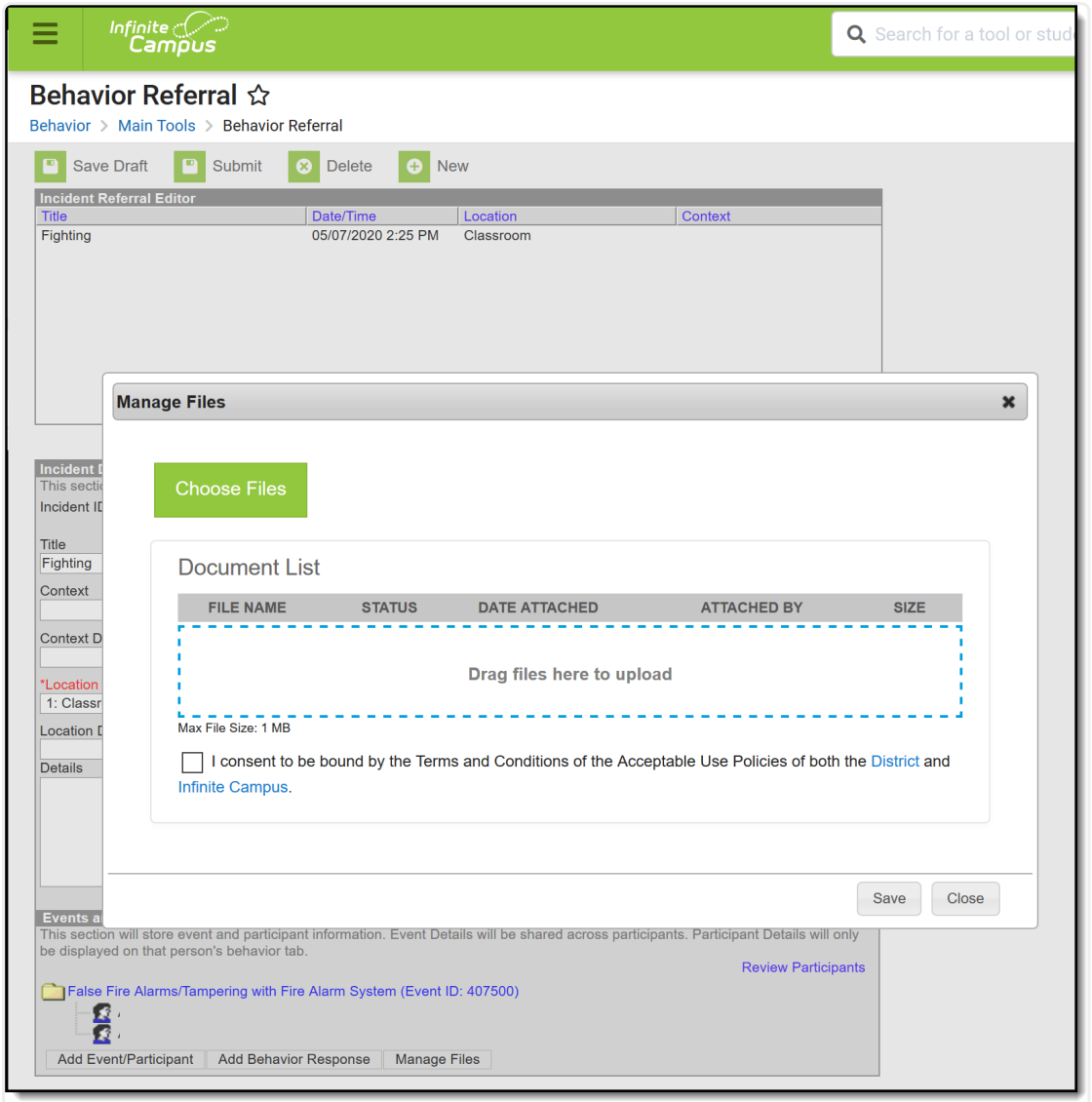

Manage Files for Behavior Events and Participants of a Behavior Event

Digital Repository settings must be enabled to display the Manage Files button:

- Mark the **Behavior** checkbox on the Digital Repository Preferences tool.
- Mark which Behavior tools (Behavior Management, Behavior Referral, Student Information General) allow files to be uploaded on the Digital Repository Behavior tool.

See the File Types article for information on which types of files can be uploaded.

Also, uploaded files cannot exceed the total max file size selected in Campus Digital Repository. There is no limit to the number of files that can be uploaded.

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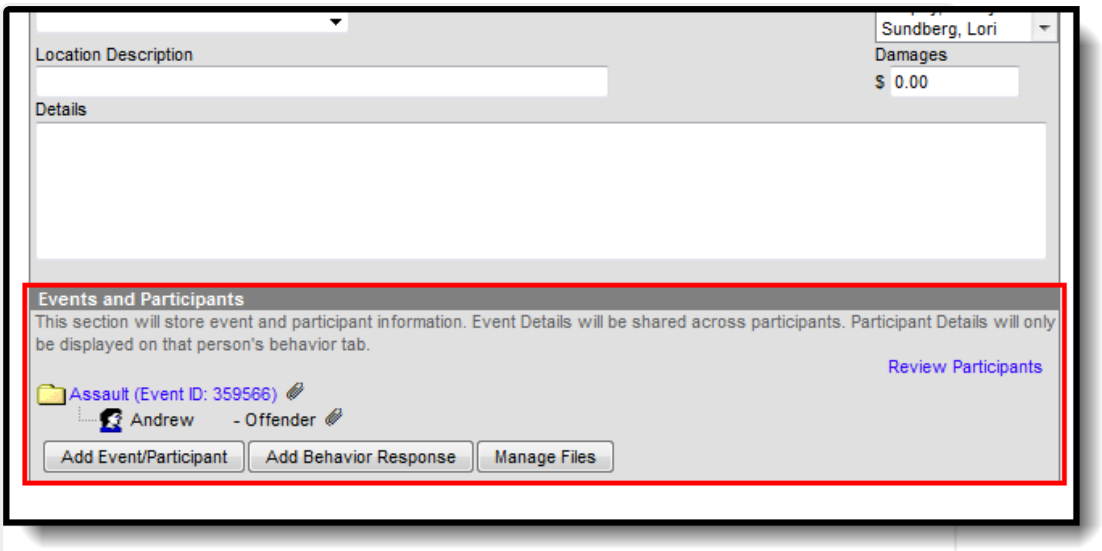
Attach Files to an Event/Participant

1. Select the desired Incident from the **Incident Referral Editor.**
2. In the **Events and Participants** section, click the **Manage Files** button. A **Manage Files** modal displays.
3. Click the **Choose Files** button in the upper left-hand corner. Files can also be dragged from a user's desktop to the **Drag Files to be Uploaded** space.
4. Locate the file to upload following the standard file upload procedures of your computer. Once located and selected to upload, the file displays in the **Document List**. If more than one file need to be added, locate all at one time.
5. Enter a **Description** of the file, if desired.
6. Determine if the file should be associated with the event and the student, or just the event. This needs to be selected for each file that is uploaded.
    - Select the **event** by marking the radio button next to the event name. **This must be selected in order to attach the file:** files must be associated with an event, but may be associated with students or other participants.
    - Select the **student(s)** by marking the checkbox. This does not need to be selected.
7. Mark the **Terms and Conditions** checkbox. This is a required selection for any file that is uploaded.
8. Click the **Save** button when finished. The file is uploaded and paperclips display next to the event and/or the participant names. Only one paperclip displays regardless of the number of files that are uploaded.



File Attached to Event and Student

View Uploaded Files

From the Events and Participants editor, click the **Event** name. The files that are associated with that event display in an **Event File**s section in the **Event Details** section. Click the link for the file to view it.

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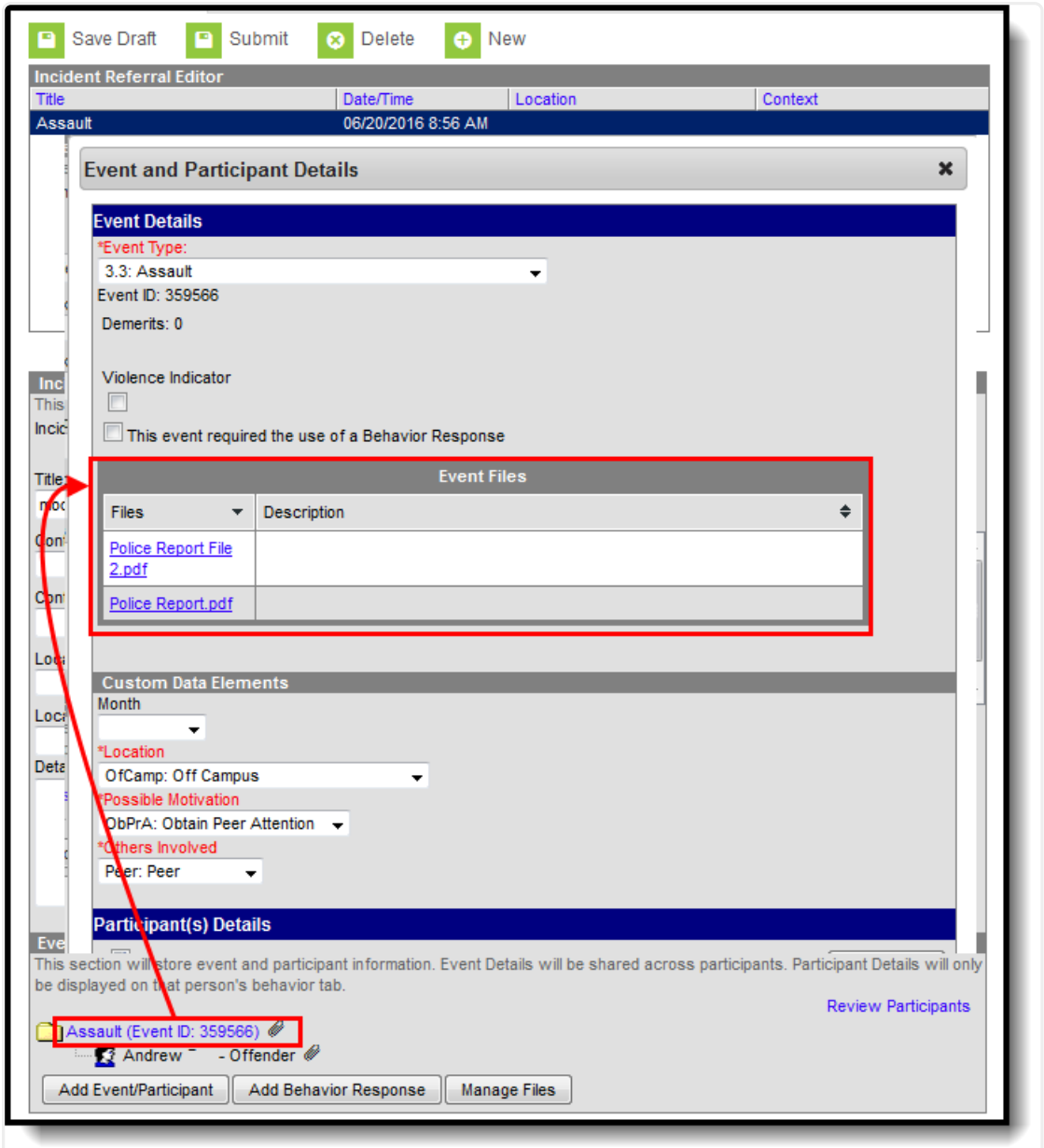

View Uploaded Files

If files were associated with a participant, those files are also viewable here in the Participant Details section in a Participant Files section. If more than one student is associated with the event, and the file was associated with multiple participants, each participant displays a separate Participant Files section.

If the participants are students, files can also be viewed with proper tool rights from the Student Behavior tool (if Digital Repository preferences for that are turned on).

Manage Attached Files

Use the Manage Files button to make any necessary changes with the uploaded files:

- Click the X next to the file name to remove the file completely. The file is removed once the Save button is chosen (the status column changes from Attached to Remove on Save).

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- Click the X next to the file to set the file to be deleted. The file status changes to *Remove on Save* and the is deleted upon saving.
- Re-select the X button of a file to negate the *Remove on Save* delete command, and have the file remain.
- Remove the checkbox selection for alignment with a participant.
- Upload more files for the selected event.
- Modify the description of the file as needed.

Save any changes that were made before exiting the Manage Files modal.

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