



### Use the Conduct Referral Workflow From Your Home Page

On your Home page in the Tasks widget, you can enter a conduct incident using the Conduct Referral workflow. It is an easy three-step process with minimal data entry for teachers and staff to enter details regarding an incident.

#### Step 1: Initiate a Conduct Referral Workflow

1. On your Home page, in the Tasks widget, click **Initiate**. Step 1 of the workflow appears.
2. Click the **Workflow** drop-down, and select **Conduct Referral**.
3. At the **Date** field, today's date automatically appears. Type or click  to select a previous date.
4. In the **Student Selection** section, select **Selected** to choose one or more students from a pick list, or select **Snapshot** to choose a snapshot of students from a pick list.
5. Click **Next**. Step 2 of the workflow appears.

#### Step 2: Enter Conduct Referral Details

1. At the **Incident date** field, today's date automatically appears. Type or click  to select a previous date.
2. At the **Incident time** field, the current time automatically appears. Edit this field to change the time, if needed.
3. Depending on your district's settings, incident IDs might be automatically assigned. If incident IDs are not automatically assigned, enter an ID at the **Incident ID** field.
4. Click the **Incident code** drop-down to select the code that best describes the incident or is the most serious offense (if more than one). If there were multiple offenses, select additional codes from the drop-downs in the **Incident Code 2** and **Incident Code 3** fields, as needed.
5. If applicable, click the drop-down in the **Weapon** field to select the weapon used by the student.
6. Click the **Incident location** drop-down to select the location of the incident.
7. Click the **Incident Motivation** drop-down to select the student's motivation for the incident.
8. If applicable, select the **Injury Resulted from Incident** checkbox.
9. At the **Incident description** field, type the details about how the incident occurred.
10. Type any notes for the conduct office in the **Incident Office** field, if desired.

#### Step 3: Confirm Conduct Referral Details

Confirm the information and click **Finish**. The workflow now appears in the Tasks area for your school's principal/conduct manager. He or she will determine if any actions need to be taken and record the necessary actions.

### Add Actions to a Conduct Incident

On your Home page in the Tasks widget, school administrators/conduct managers can add actions to an incident. Click **Determine action** next to the appropriate Conduct Referral. Step 1 of the Conduct Referral wizard appears.

#### Step 1: Determine Action

1. Review the information.
2. At the bottom of the pop-up, select one of the following:
  - **Post:** To record the incident and allow you to add actions to it.
  - **Do not record:** To not post the referral. The conduct referrer (most likely a teacher) will see whether the incident was posted or not, as well as any administrator comments.
  - **Investigate (Bullying):** To investigate whether this is a bullying incident (launches the Bullying Investigation workflow).
3. Click **Next**. Step 2 appears.

#### Step 2: Post

1. Click **Add** to add an action. The following pop-up appears:
2. At the **Action code** field, type or click to select an action code.

**Note:** If you select a detention or suspension action code, an interactive calendar appears. Click the individual rectangles representing the day(s) the detention or suspension is to be served, then click **OK**.

3. At the **Action start date** and **Action end date** fields, type or click to select the date the action starts and ends.
4. In the **Penalty time** field, type the number of days that the student is required to serve the action. If you select a detention or suspension code, this field is updated as you enter dates into the calendar.
5. At the **Action description** field, type more details if desired.
6. Click **OK**.
7. Add more actions if needed, repeating steps 1-6.
8. At the **Administrator remarks** field, type remarks if needed.
9. To print a copy of the form, select the checkbox next to **Print form on exit**.
10. Click **Finish**.