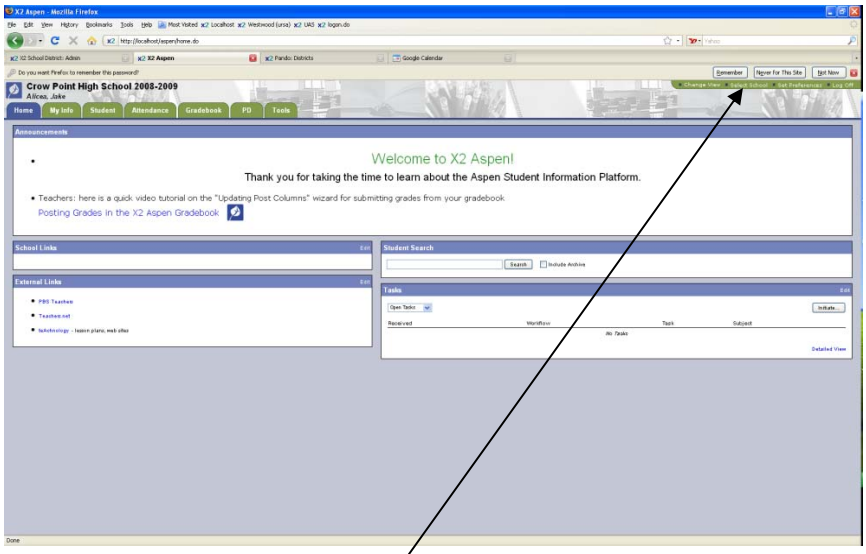
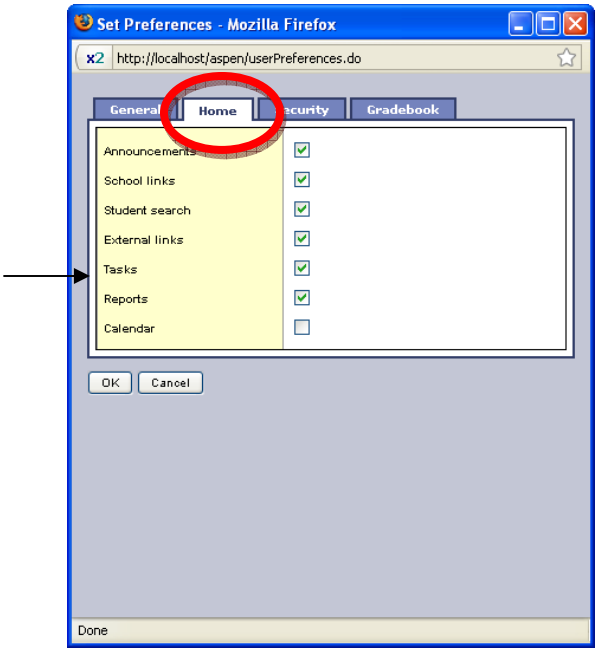
Using Workflows for Entering Conduct Referrals

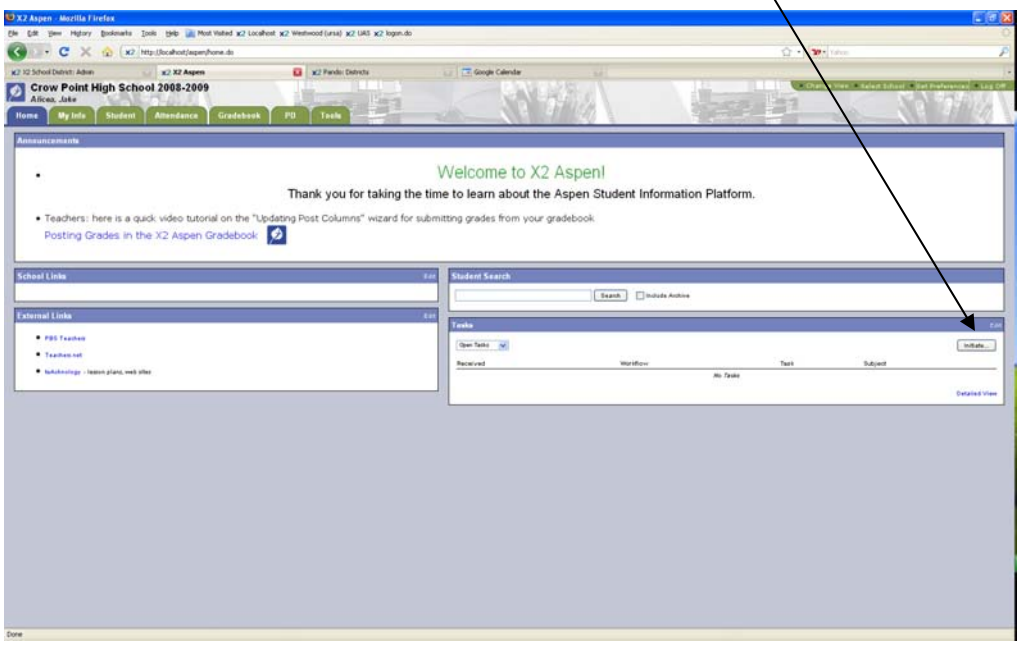
Teacher will log on to Aspen and will automatically be on the Home Page.



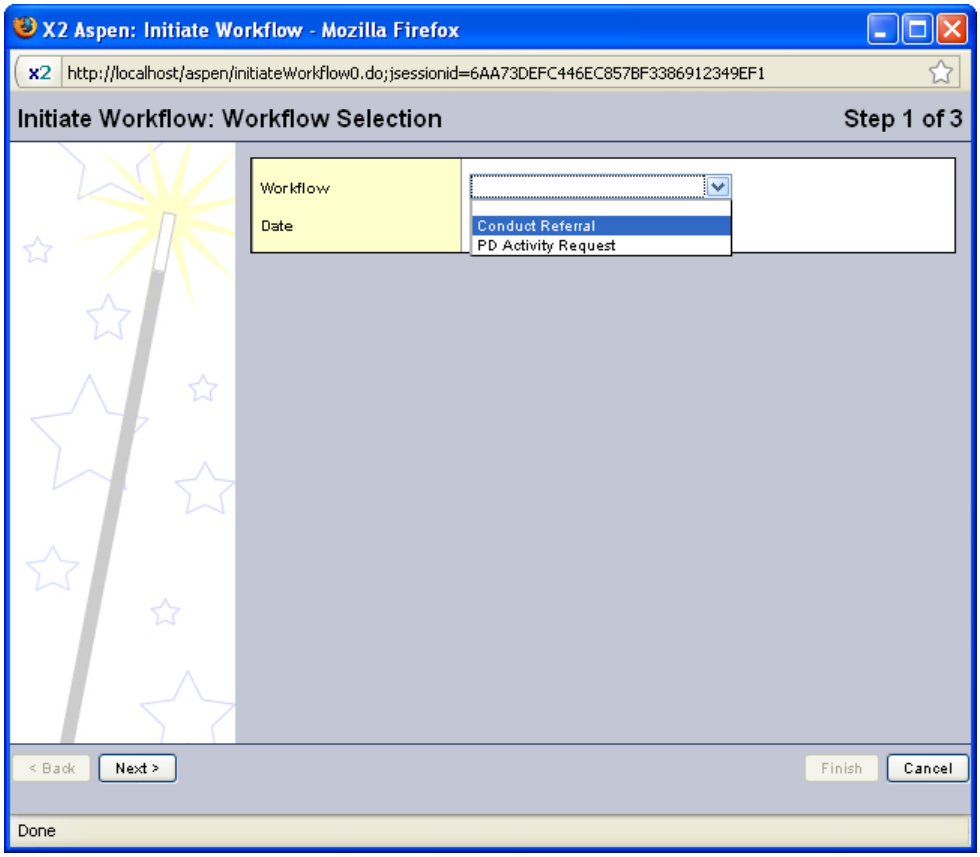
Teacher will need to select Set Preferences and select the Home tab. Tasks must be checked.



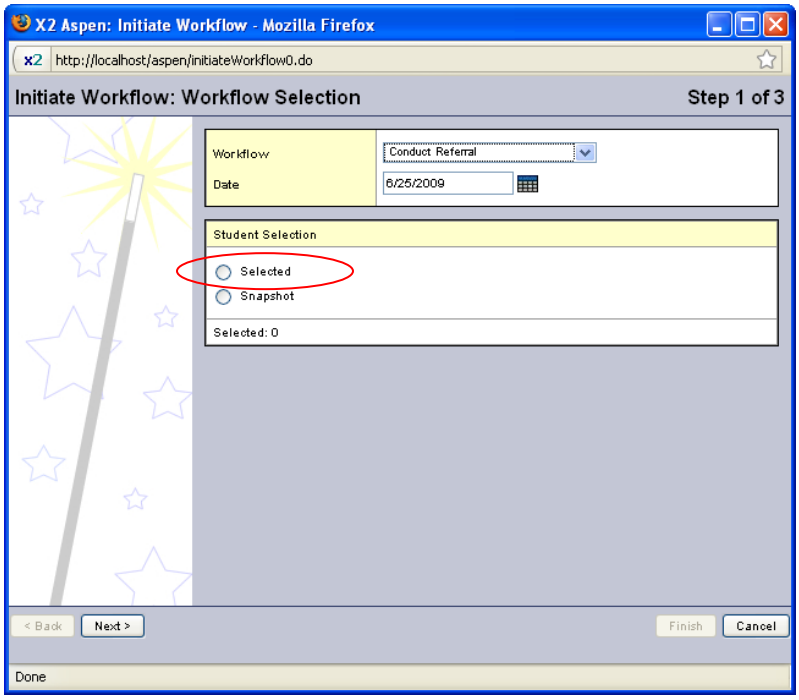
From the Home Page, go to the Tasks Area, and select the Initiate button.



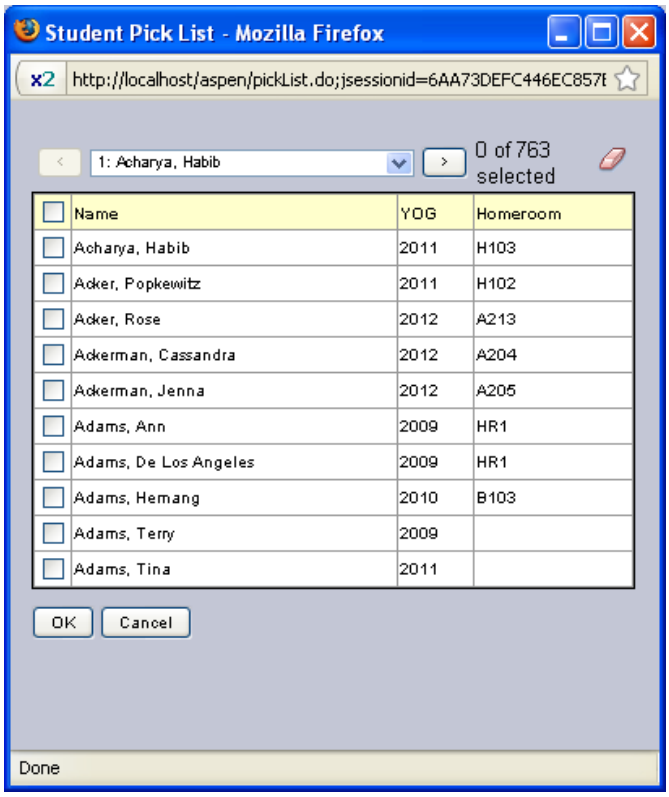
From the workflow dropdown, select Conduct Referral



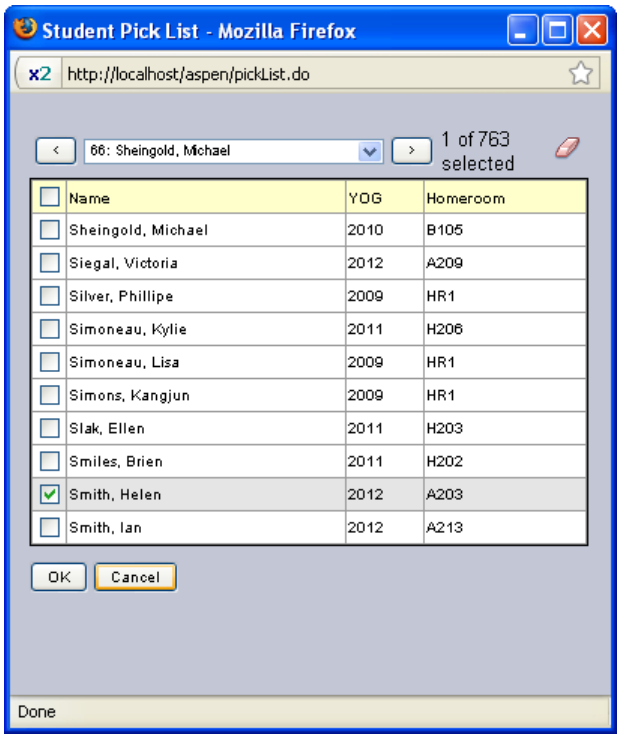
From Student Selection, click the Selected radio button



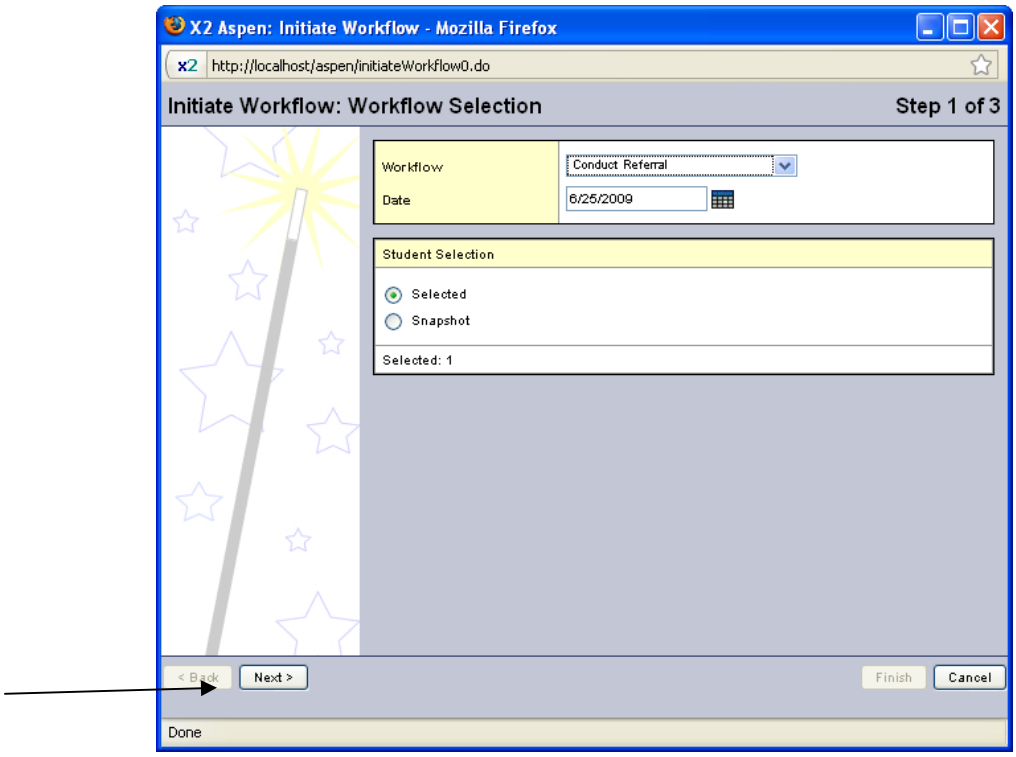
Once the Selected radio button is selected, a list of all active students in the building will appear.



Use CTLR+F to find the student you are entering the referral for, and click in the checkbox next to the student's name, then click OK.

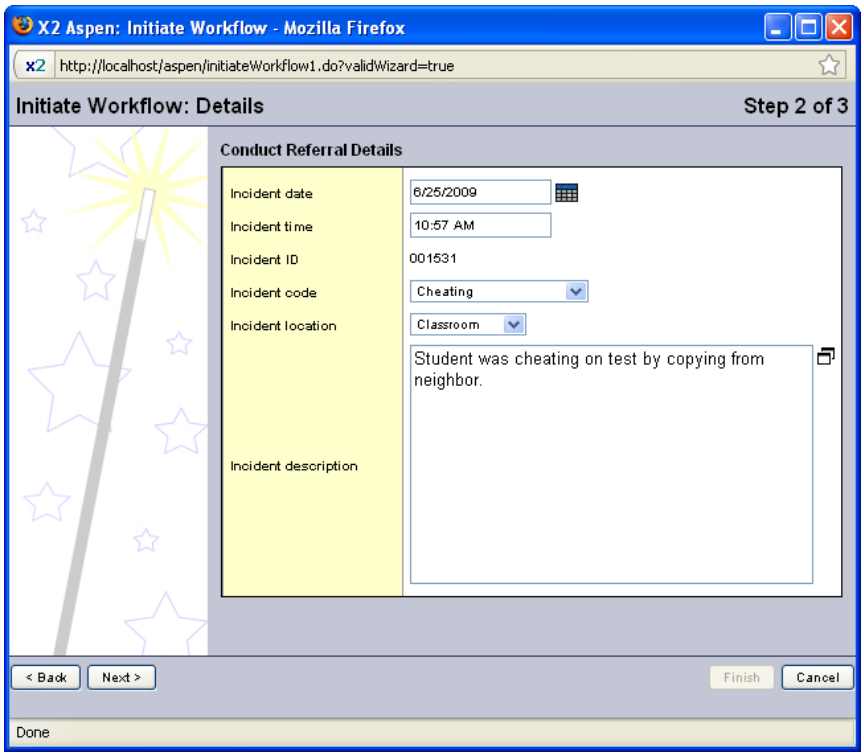


You will then be taken back to the student selection screen. Click on Next.



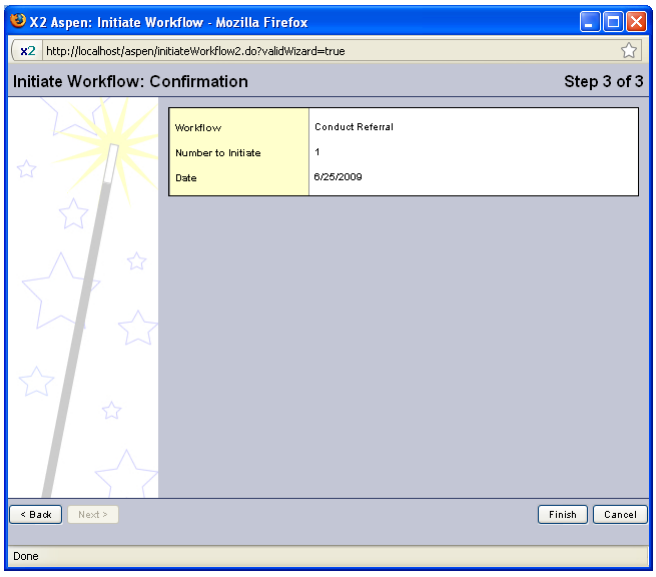
Add the details of the referral in Step 2.

Select the incident code, the incident location, and fill in a description of the incident.



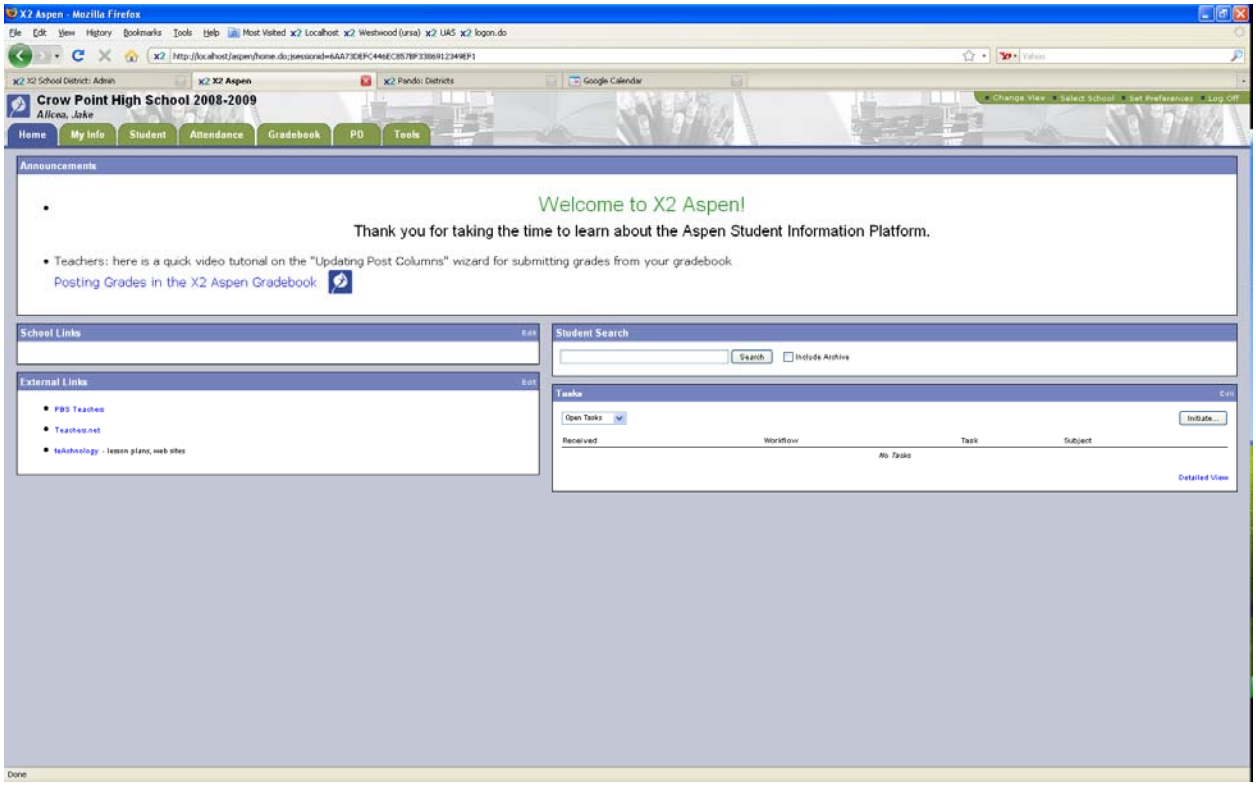
Click on Next.

You will receive a confirmation in step 3 that your referral was initiated.

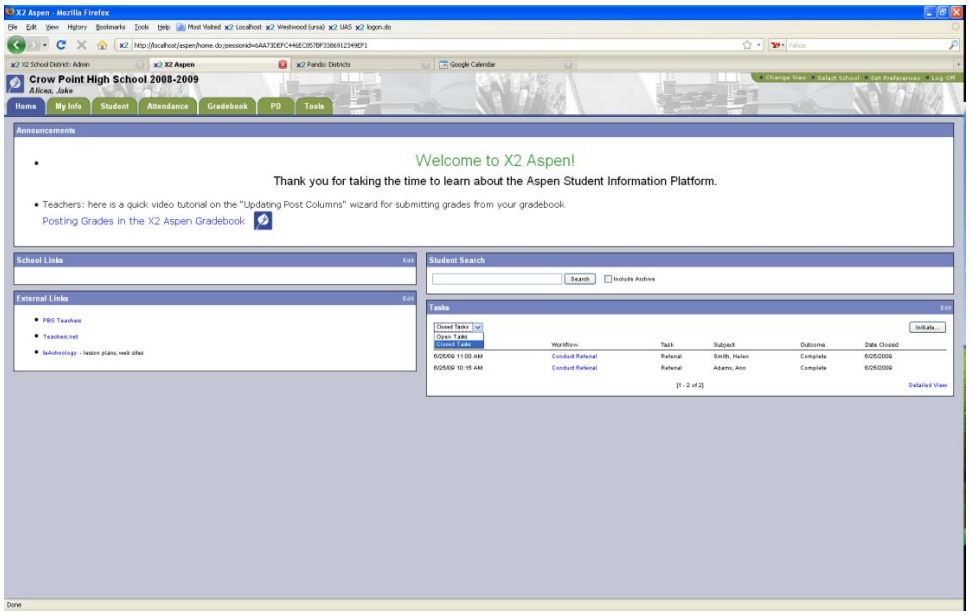


Click on Finish.

Your will be brought back to the Home Page.

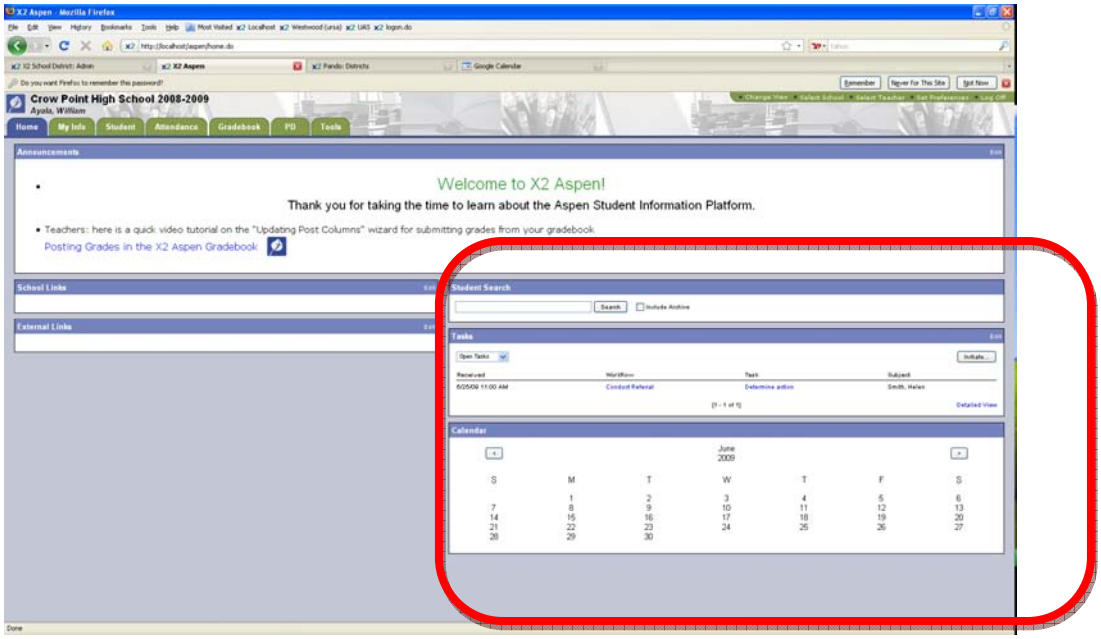


Go back to the Tasks area, and select Closed Tasks.

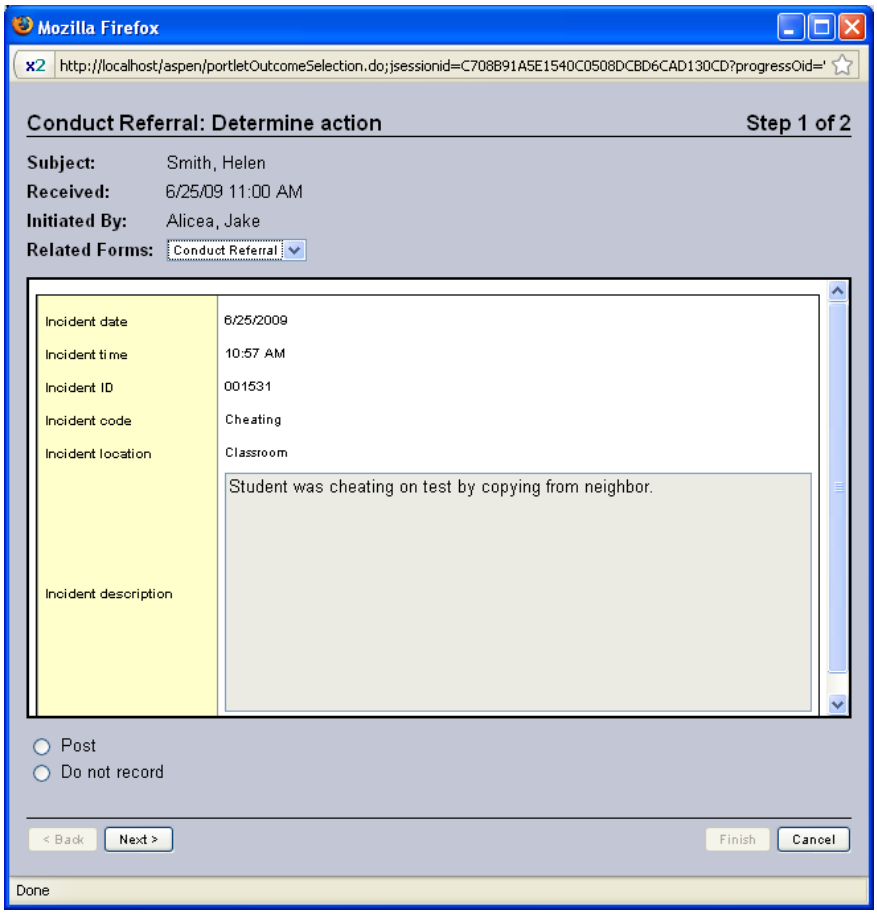


Here you will see the referrals that you initiated, in a closed status. They are closed because they have been submitted to the school administrator.

Once submitted, the school administrator will see submitted referrals in their Tasks area.

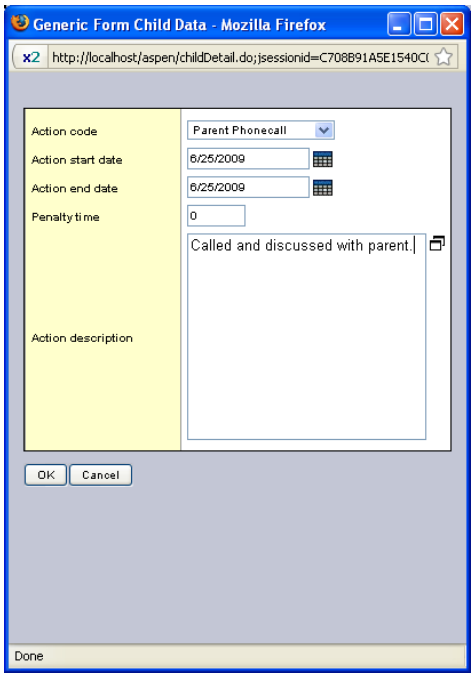


When they click on Determine Action, they will see the details of the referral.

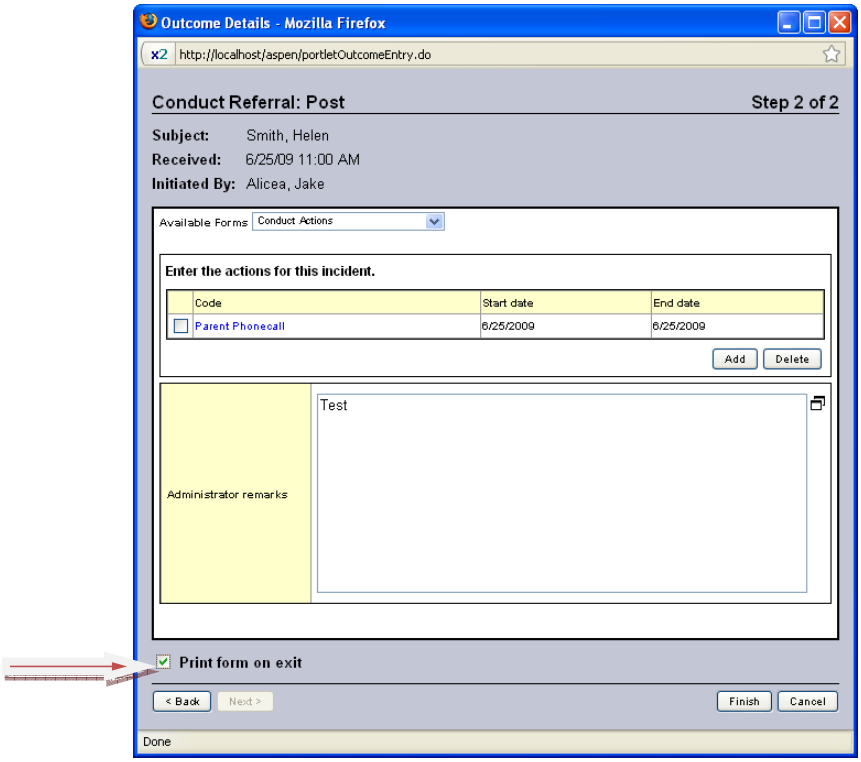


Here they will clock on Post to add the incident to the student's record or Do Not Record if they choose not to post it to the student's record.

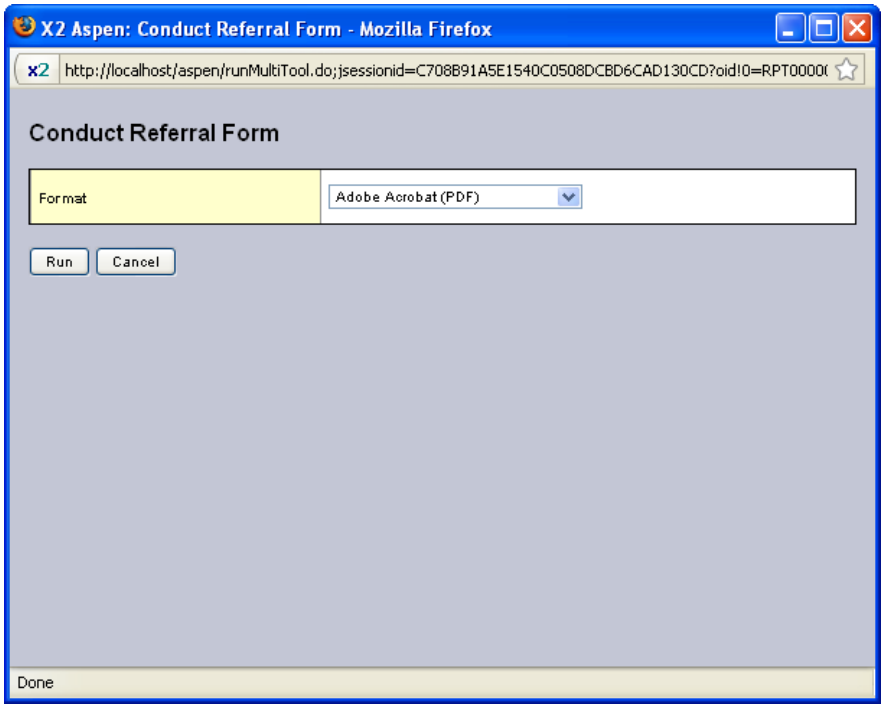
If Post is selected, Step 2 will allow them to add the Action.



Once OK is clicked, remarks can be added and a referral report can be printed on exit.

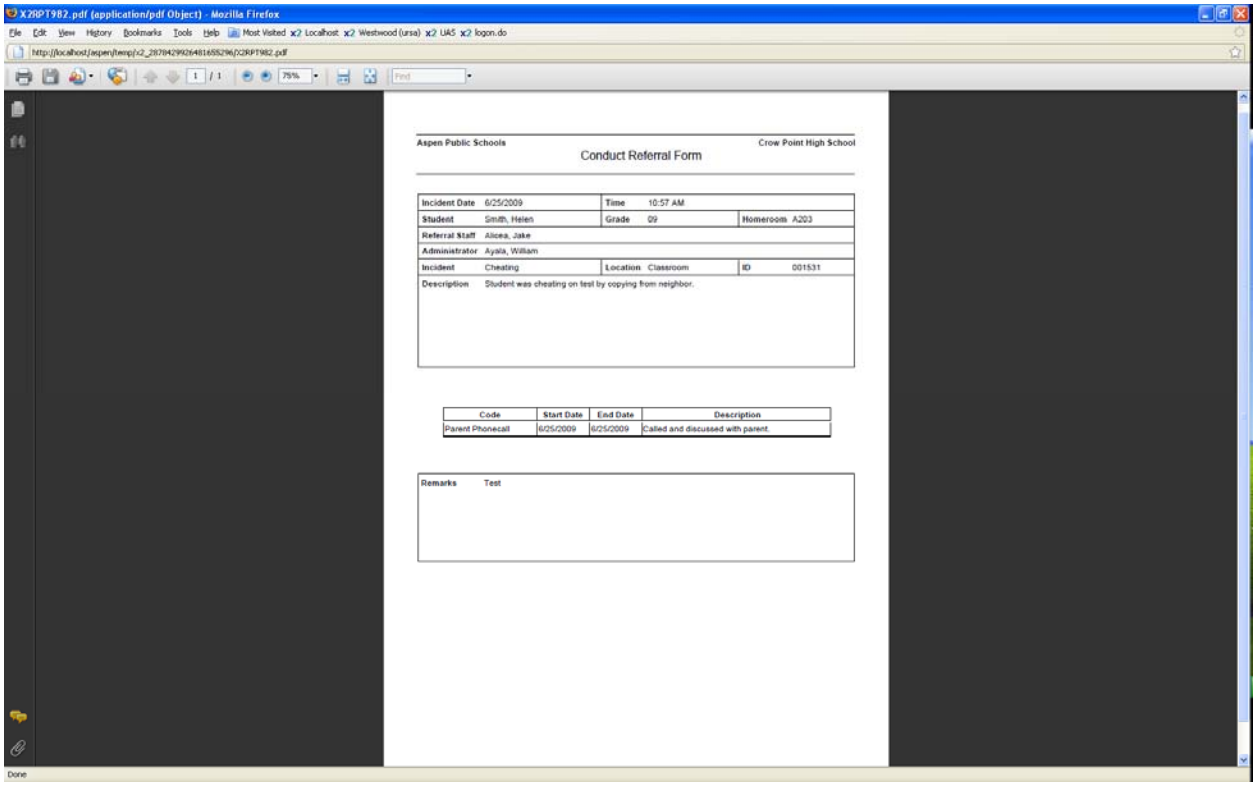


A prompt will ask for the report format.

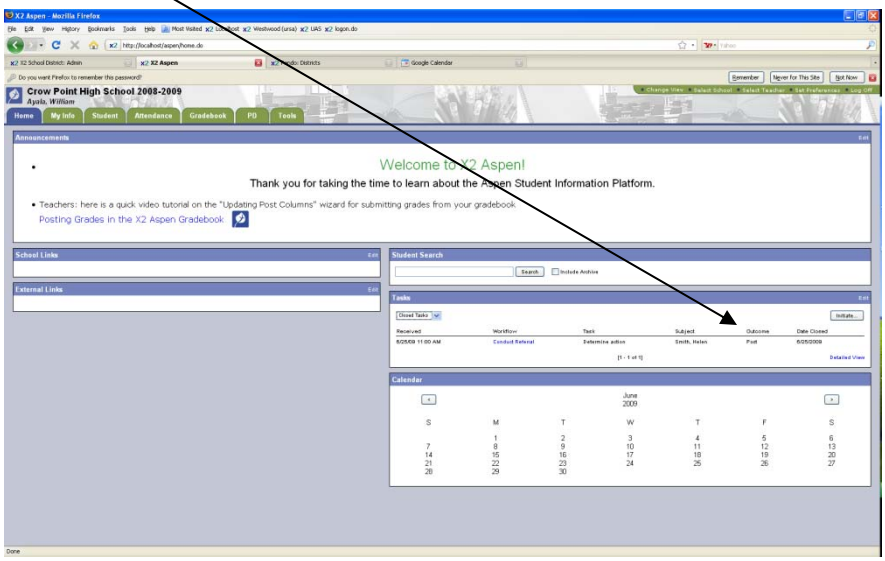


Select a format and click on Run.

All details of the referral will be in a printable report.

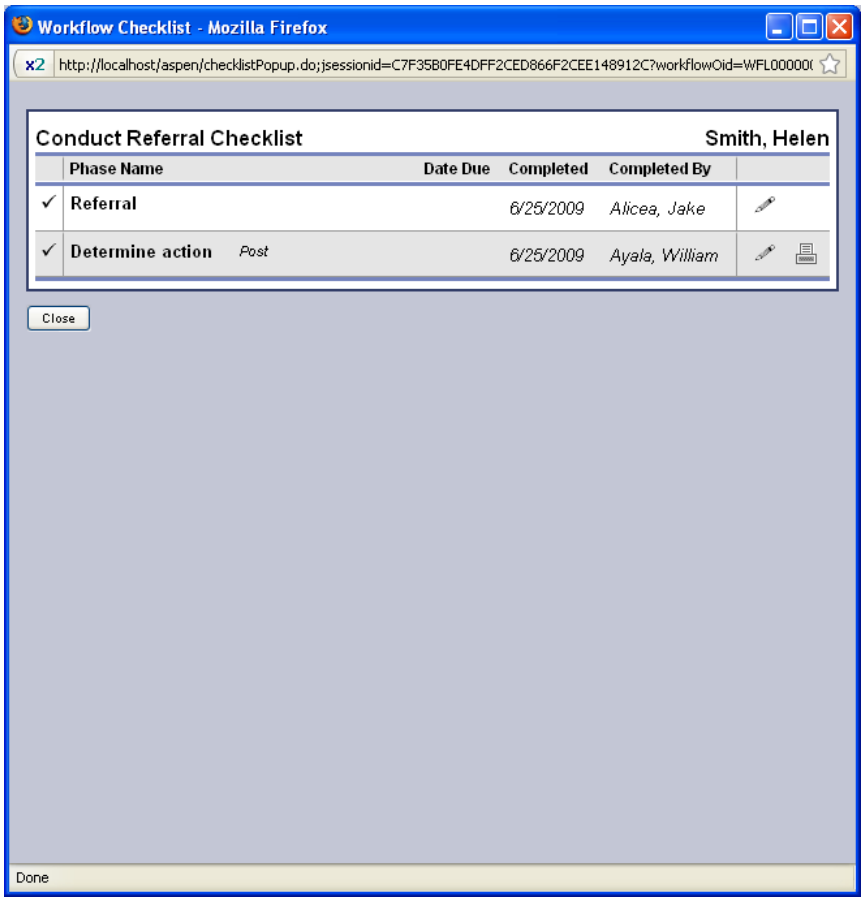


Once the administrator is finished, the referral will also appear in his closed tasks, and the outcome will display Post.

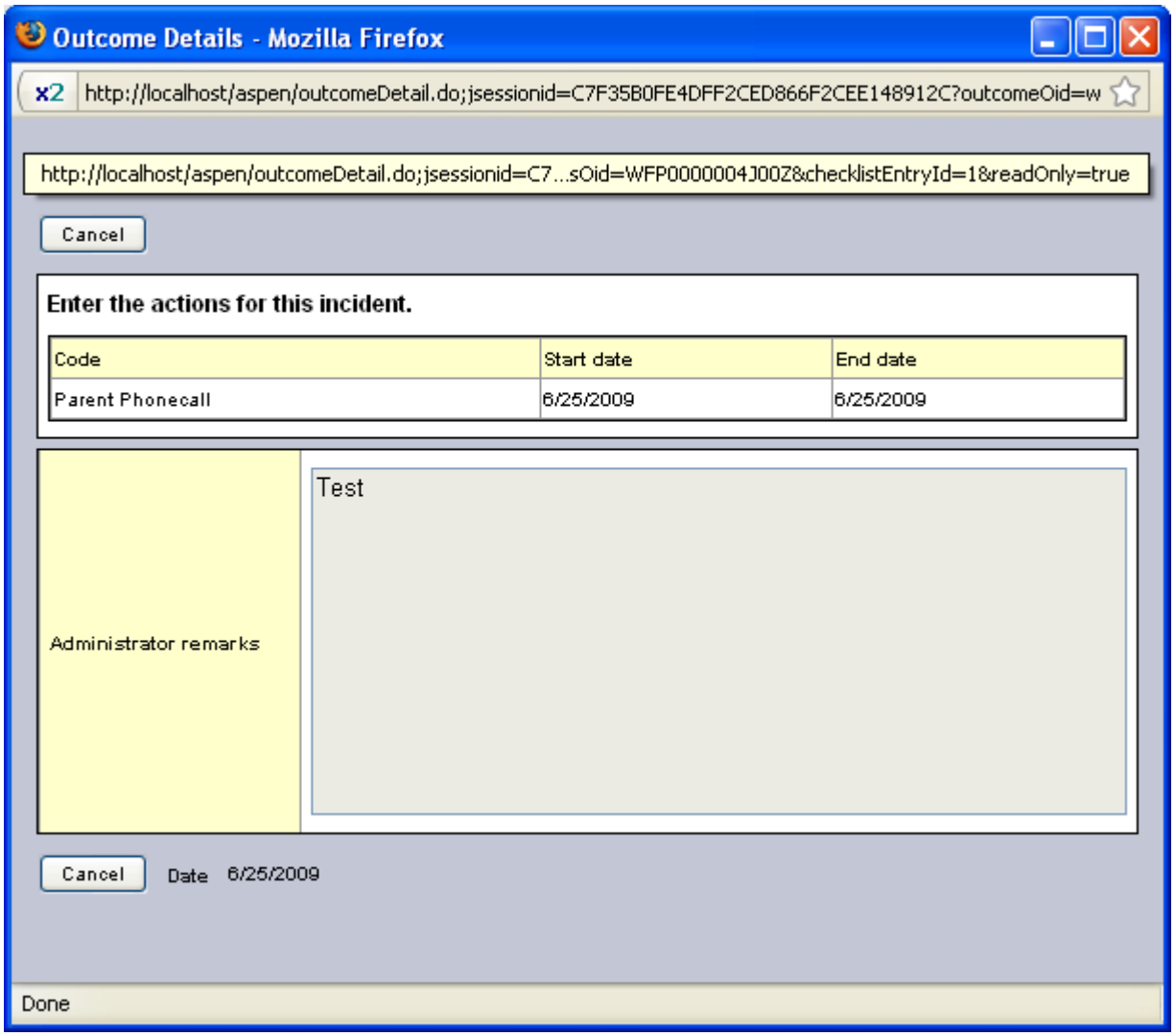


After this is completed, the teacher can select the referral from their closed tasks.

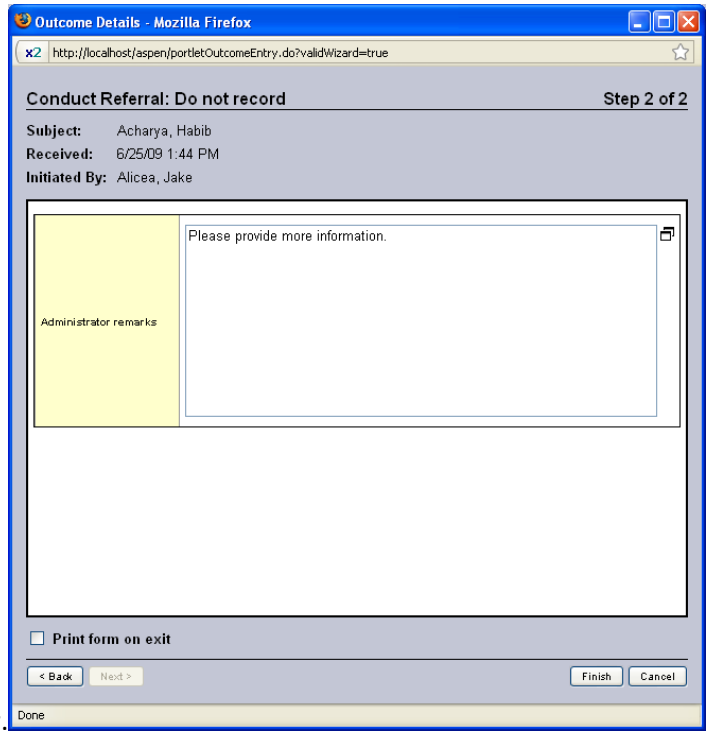
They will see a referral checklist where they can see each phase.

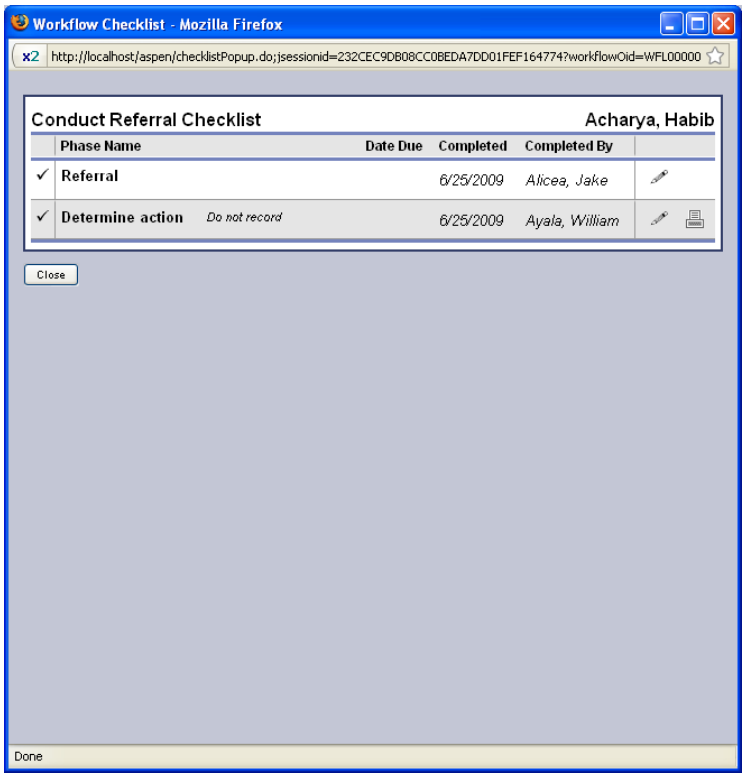


To view the details of the Determine Action phase, they can select the edit (pencil) icon on the right, where they can view the action for this referral and any remarks entered by the administrator.



If administrator chooses not to post the referral to the student's record, they can choose Do Not Post. They can add additional remarks for the



teacher.

When the teacher views the referral in their closed Tasks, they will see that the referral was not recorded, and if they click on the edit icon, they will see the administrator's comments.