

Creating Discipline Referrals in Teacher Access

Creating discipline referrals in **Teacher Access** enables teachers to enter disciplinary information for a student. For example, a teacher could enter a [Discipline Referral](#) for an infraction, such as fighting. Similarly, a teacher could enter a warning for a minor infraction, such as cell phone use in class. Once the referral or warning has been entered by a teacher, a [Discipline Officer](#) determines if the referral or warning should be updated to an incident, and can add [Actions](#) for the student. Actions cannot be added to referrals or warnings. The referral or warning must be updated to an incident in order to add actions. The teacher can view this information, but cannot add actions or action details. The Warning radio button is only available if the [Warning](#) box is checked for the Allow field within the **District Year Configuration** of the **Discipline** module.

Teachers can edit the information in their referral records as long as it still is a referral or warning. Once a referral has been changed to an incident, they can no longer edit the information.


The following instructions provide an example of how to create a referral or warning with Offender selected as the Involvement Type and Student selected as the Involved Person Type. If you wish to create a record with a different Involvement Type and Involved Person Type combination, you can review the Incident/Referral Field Selections reference table. The fields that display vary based on the Involvement Type and Involved Person Types you select.

Scroll past the video to access the step-by-step instructions.

▼ Show Audio Transcript

04:30

▲ Hide step-by-step instructions

1. Select  **MENU** > **Teacher Access** > **Discipline**.
2. Select **Referral** under **Features**.

You see the **Teacher Referrals** screen, which displays existing [Discipline Referrals](#), including the involved persons, [Actions](#), and [Action Details](#).

3. Verify you are in the correct [Entity](#) and school year by checking the information at the top left of the screen.
4. Under the **Involved Persons** heading, click **Add Referral** near the top right of the screen.

If the box for Allow Historical Data to be Updated is not checked in the **System Configuration** of the **Discipline** module, you cannot add a referral to a historical school year. This box must be checked by a user with administrative access to ensure the Add Referral option displays.


You see the **Add Incident** screen.

The screenshot shows the 'Add Incident' screen with the following details:

- Entry:** 401 - Orbit North High School
- School Year:** 2024-2025
- INCIDENT DETAILS**
 - *Incident Number:** 170
 - Incident Type:** Referral, Warning
 - *Primary Offense:** BLY (dropdown), Bullying (dropdown)
 - Recommended Action:** DET (dropdown), Detention (dropdown)
 - *Incident Date:** 12/10/2023 Wednesday
 - Incident Time:** 03:23 PM
 - *Description:** The student repeatedly used crass language directed toward another student.
 - Referred by Type:** Staff (dropdown)
 - Staff Filter Type:** District, Entity
 - Referred By:** Norris, Douglas (dropdown)
 - Incident Location:** CLASS (dropdown), Classroom (dropdown)
 - Incident Building:** 401 (dropdown), Orbit North High School (dropdown)
 - Incident Room:** 001 (dropdown), 001 (dropdown)
 - Cost:** 0.00

5. Complete the appropriate fields.

Required fields are identified with an asterisk. You must complete required fields before you can save your work.

- Optional: Verify the Template near the top right of the screen or click the  icon to choose the correct template from the drop-down list.

If the workflow template you wish to use does not exist, you can create a new Workflow Template. If necessary, you can click **Template** near the top right of the screen to expand the workflow template area.

- Under the **Incident Details** heading, verify the assigned **Incident Number** is correct.

This defaults to the next available number and cannot be modified.

c. Select the appropriate radio button for the **Incident Type**.

The Warning radio button only displays if the box for Warning is checked for the Allow field in the **District Year Configuration** of the **Discipline** module.

If you selected Referral as the Incident Type and the box for [Action Recommendations Connected to Referrals](#) is checked for the Allow field in the **District Year Configuration** of the **Discipline** module, the Recommended Action field displays.

d. Enter the **Offense**.

If the box for Only One Offense Code Per Incident is checked for the Allow field in the **District Year Configuration** of the **Discipline** module, this field displays as Offense. If the box is not checked, this field displays as Primary Offense.

If you selected Referral as the Incident Type and the box for Action Recommendations Connected to Referrals is checked for the Allow field in the **District Year Configuration** of the **Discipline** module, continue to the next sub-step.

If you selected Referral as the Incident Type and the box for Allow Action Recommendations Connected to Referrals is unchecked in the **District Year Configuration** of the **Discipline** module, skip to sub-step f.

If you selected Warning as the Incident Type, skip to sub-step f.

e. Optional: Enter the **Recommended Action**.

Recommended actions enable the teachers entering referrals to suggest which action they believe is appropriate for the offense committed by the student. For example, you may have caught a student hitting another student, but due to the events leading up to the offense, you wish to suggest a lesser punishment than would normally be issued.

f. Optional: Verify the **Incident Date** or enter the correct date.

If the box for [Default Date and Times](#) is checked in the **District Year Configuration** of the **Discipline** module, this defaults to the current date but can be modified if necessary.

- g. Verify the **Incident Time** or enter the correct time.

If the box for Default Date and Times is checked in the **District Year Configuration** of the **Discipline** module, this defaults to the current time but can be modified if necessary.

- h. Enter a **Description** to further define the infraction.

For example, you could indicate that student A punched student B.

- i. Verify the **Referred by Type** is correct.

This defaults to Staff and cannot be modified.

- j. Verify the **Staff Filter Type** is correct.

This defaults to Entity and cannot be modified.

- k. Optional: Verify the name of the staff member in the **Referred By** field is correct.

This defaults to the name of the staff member creating the referral and cannot be modified.

- l. Optional: Enter the **Incident Location**.

This indicates the location within the building or premises where the location occurred. For example, if an incident occurred in the hallway, you could select

Hallway. Additionally, if you track location, you can run a report to see the number of incidents occurring in each area.

- m. Optional: Enter the **Incident Building**. If you selected an Incident Building, enter the **Incident Room**.

This indicates the building where the incident occurred. For example, if an incident occurred at the high school, you could select the appropriate high school building. If you also know the room where the incident occurred, you can specify that as well.

This field only displays if the box for [Incident Building and Room](#) is checked for the Allow field in the **District Year Configuration** of the **Discipline** module.

- n. Optional: Verify the **Cost** or enter the correct value.

This defaults to 0.00, but can be modified if necessary. For example, if the student damaged school property during the incident, you could indicate the amount the student must pay to repair the damages.

- o. Under the **Offender / Involved Person** heading in the **Add Offender / Involved Person** area, select Offender from the **Involvement Type** drop-down list.

You can click **Add Offenders / Involved Persons** near the bottom left of the screen if you wish to add another involved person type. Refer to the Incident/Referral Field Selections reference table to complete the record. You must add at least one offender to save the record.

- p. Select Student from the **Involved Person Type** drop-down list.

Refer to the Incident/Referral Field Selections reference table if you wish to complete the incident/referral record for a different involved person type.

- q. Select the appropriate radio button for the **Student Filter Type**.

This option filters the names available for selection in the Student Name field. If you select District, you can choose students enrolled at any entity in the district. If you select Entity, you can choose students enrolled in the specific entity you are working in. If you select Class, you can only select students who are enrolled in a class you teach.

The District and Entity radio buttons are enabled if the boxes for District and Entity are checked for the Allow Teacher Referrals for Students Within Their field within the **District Year Configuration** of the **Discipline** module.

r. Enter the **Student Name**.

Selecting a name displays that student's [Indicators](#) and the  icon.

s. Optional: Verify the box for **Exclude Primary Offense** is checked or unchecked.

This field only displays if the box for Only One Offense Code Per Incident is not checked for the Allow field in the **District Year Configuration** of the **Discipline** module.

If the box for Allow Only One Offense Code Per Incident is checked in the **District Year Configuration** of the **Discipline** module, skip to sub-step u.

If the involved person you are adding to the record was involved in secondary offenses but not the primary offense, you would check this box. If you check this box, the Primary Offense field to the right of this field defaults to blank and cannot be modified. If you do not check this box, the Primary Offense field defaults based on the Offense you selected and cannot be modified.

t. Optional: Enter one or more **Secondary Offenses**.

This field only displays if the box for Only One Offense Code Per Incident is not checked for the Allow field in the **District Year Configuration** of the **Discipline** module.

You can click **Add Offenders / Involved Persons** near the bottom left of the screen if you wish to add other offenders or involved persons to this referral or warning record. You can add as many offenders or involved persons as necessary.

- Entering all offenders or involved persons enables you to clearly document the incident that occurred and track who was involved without having to add multiple records to keep track of information in regard to the same event.

u. Optional: Enter the **Discipline Officer**.

If a student is already assigned to a particular discipline officer, this field defaults but can be modified if necessary.

For example, if you wish to indicate that a particular discipline officer is looking into this incident, you would enter their name in this field.

v. Optional: Enter a **Statement** for the incident.

For example, you could enter a comment by the offending student about the incident or referral.

w. Optional: Enter the **Perceived Motivation**.

For example, if a student hit another student in self-defense while being bullied, you could select Bullied to indicate the possible reason why the student committed the offense.

This field only displays if the box for [Perceived Motivation](#) is checked for the Allow field in the **District Year Configuration** of the **Discipline** module.

x. Under the **Federal Reporting** heading, choose the **Basis of Harassment/Bullying Override** from the drop-down list.

You would select an override if the value on the Offense code is missing or does not reflect the Incident / Referral record correctly.

If you selected Religion, the Federal Religion Type field displays. Continue to the next sub-step.

If you did not select Religion, skip to sub-step z.

y. Enter the **Federal Religion Type**.

z. Click **Next** near the top left of the screen.

You see the incident and the involved persons' information.

The screenshot shows the 'Add Incident' form with the following details:


- INCIDENT DETAILS**
- Incident Number: 120
- Incident Type: Referral, Warning
- Recommended Action: DET, Detention
- Incident Date: 12/10/20 Wednesday
- Incident Time: 03:23 PM
- Referred by Type: Staff
- Referred By: Norris, Douglas
- Incident Location: CLASS, Classroom
- Incident Building: 401, Orbit North High School
- Incident Room: 001, 001
- Description: The student repeatedly used crass language directed toward another student.

INVOLVED PERSONS

Search Full Name [] View: Skyward Default More [v]

Full Name	Student Number	Involvement Type	Offense	Primary Offense
Anders, Will	2700002	O - Offender	BLY - Bullying	<input checked="" type="checkbox"/>

aa. Verify the referral or warning details are correct.

6. Click  near the top left of the screen to save your work.

7. Click **Close** near the top left of the screen.

You return to the **Teacher Referrals** screen, which displays the [Discipline Referral](#) or warning you created under the **Involved Persons** heading. If notifications are configured for discipline referrals and warnings, they will be sent according to the parameters set up. A discipline officer can now review the referral or warning and process it within the **Discipline** module.

✓ Result(s)

You have successfully created a discipline referral or warning via **Teacher Access**.

Continue to next page **»**