



On-Line Conduct Referrals Using the X2 Staff View

Does the on-line Conduct Referral Workflow replace the traditional methods of referring student or entering conduct?

• No. Administrators and office staff can still enter and maintain conduct records through the regular procedures. The on-line version is for teachers that allows them to eliminate forms, time lapses and receive immediate feedback from administrators when their referral is acted on. *However, Durfee teachers must use the on-line referral for normal incidents they may have. They are asked to not submit paper referrals.*

Does all referrals sent by a teacher become official referrals?

• No. Referrals received by a conduct administrator only become official conduct records, when posted by them with an action record. Conduct Administrators have the option of rejecting the referral or sending it back for additional information.

Who Can Use the Conduct Referral Workflow?

• Any staff member, with an instructor role in X2, can initiate a referral through their own X2 account by accessing their Task Box.

Who Cannot Use the Conduct Referral Workflow?

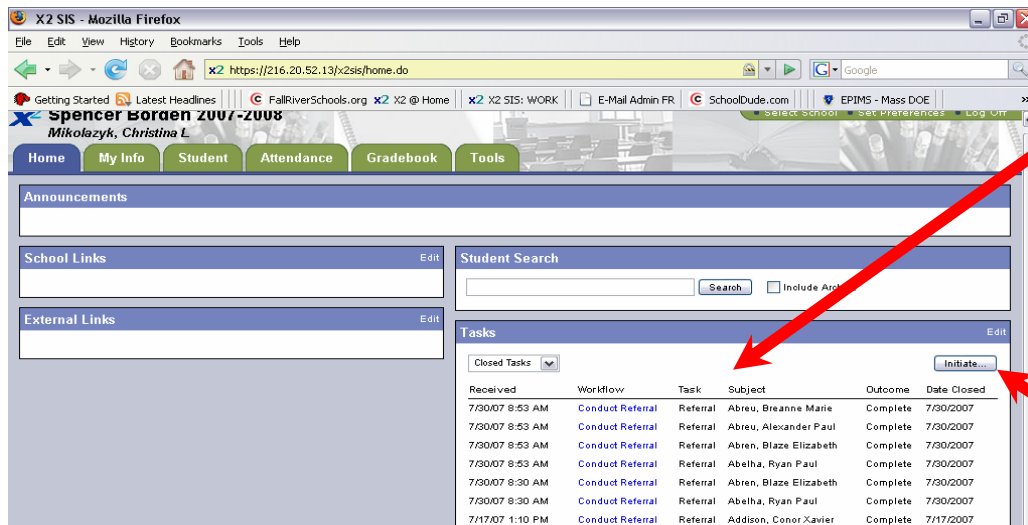
• Substitutes and other staff without an X2 account will need to fill out a paper referral and submit to the appropriate administrator.

Initial Set-Up

1. Log in to X2 with your user ID and password which will bring you to your homepage.
2. Click the Set Preferences link in the top right corner of your homepage.
3. On the popup window, click the Home Tab, which give you options to customize your homepage.
4. Check off the box that says Tasks. This will activate your Task Box on your homepage.
5. Click OK on both pop-ups, to save your changes.

★ *Durfee teachers should contact Al Simbro, Ray Medeiros or their department head for initial support.*

The Task Box allows you to initiate, monitor and receive any X2 workflows that your account has access to. The Conduct Referral is one of several workflows that are in use now (Sped IEPs) or are in development (Personal Day Requests) to create paperless and accurate systems of communicating internally.



REQUIREMENTS

- All students need to have a Conduct Administrator assigned to them on their Student Details page in X2. The dropdown displays eligible administrators who can receive the conduct of a student.
- Conduct Administrators must have a matching Conduct Administrator code entered for them on the Staff Details page in X2. This field is found on the Conduct Workflow field set, not the Default field set.
- Students or staff missing required information will not be processed correctly. School staff must continuously monitor and edit these fields so the appropriate conduct administrator receives referrals.

Step 1 – Initiate

- Click the INITIATE button on your task box and select the Conduct Workflow. A pop-up will appear.
- Select student(s) off the list of students in the school. You also have the option of creating and selecting a snapshot of students.
NOTE: You can select multiple students for the same referral and each will be delivered as a separate record to the appropriate conduct administrator associated with the student. For example if 8 different students cut your teacher detention on Monday, you can pick all 8 students from the list and then enter the description once.
- Click NEXT to finish your referral.


Step 2 – Conduct Referral Details

- Edit the date and time of the incident since the system defaults to the present, unless edited otherwise.
- Choose a location.
- Write a full description of the incident. Include, if applicable, any preventive methods used before referring the student.
- Click NEXT to send the referral to the administrator.

Step 3 – Check Task Box

- Your sent referral should now be displayed in your Task Box. Click on a referral to view what was submitted in the Checklist.
- Once a referral is acted upon by an administrator (*Posted, Rejected, Returned*) it will automatically have an Action link on the referral for you to view the results.
- At any point you have the option of clicking the printer logo to print out the referral.




NOTE: Completed referrals cannot be sent back to the administrator.



https://216.20.52.13 - Workflow Checklist - Mozilla Firefox

Conduct Referral Checklist

Abigail, [Redacted Name]

✓	Referral		7/30/2007	cmikolazyk	
✓	Determine action	Post	7/30/2007	mwoollam	 

Close

- Pencil Icon is for viewing and editing
- Printer Icon will display a PDF to print

★ Office & Staff Follow-Up

- Referrals that are posted as official school conduct records can still be edited by administrators and office staff. Any changes you feel should be made should be discussed with the appropriate administrator. They will determine what revisions need to be made.
- Posted conduct records can also be viewed by teachers in the X2 Staff View, by following the following steps:
 1. Click the Student Tab
 2. Select a student.
 3. Click the Conduct Side-Tab for the student.
 4. Adjust filters to view what is in the conduct file.