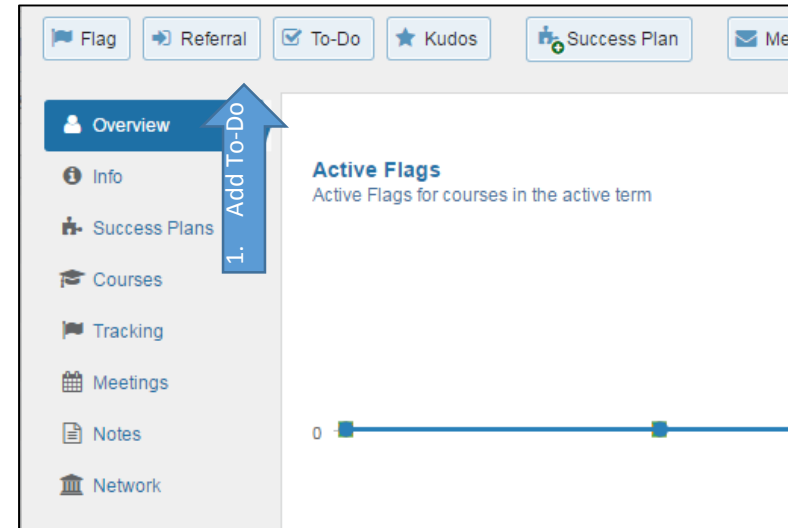


Assigning To-Dos and Referrals

To Assign a To-Do:

1. Go to student file and click “add To-Do.”
2. It will open a window for you to select your “to-do.”



* To-Do

Course Context

Comment

Permissions: A tracking item must be selected to determine the sharing permissions

* Required fields

3. Choose the to-do you would like to assign. A full list can be found on the website under “To-Do Descriptions and Notifications.”

4. If the to-do is being raised for a particular course, indicate that in the Course Context drop-down.




5. Include any comments that would help another faculty or staff member as they provide support to the student.


6. Once you've chosen a to-do, you will also see a light-blue shaded box at the bottom of the flag.


This box tells you who can view a particular tracking item. Please note that a student can always view a to-do and will always be emailed about them. They can also see any notes you include in the comments section.

The blue box also includes the permissions for others who can view this item and the notes you include.

7. Once you have finished adding comments and are satisfied with this to-do, click save.

* To-Do	Finalize Your Financial Aid 
Course Context	No Course  
Comment	Ensure that you have finalized all financial aid paperwork and requirements, or make arrangements with Student Financial Services or the Business Office.

 **Student View:** The student can view this item and the notes entered above.

 **Permissions:** People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

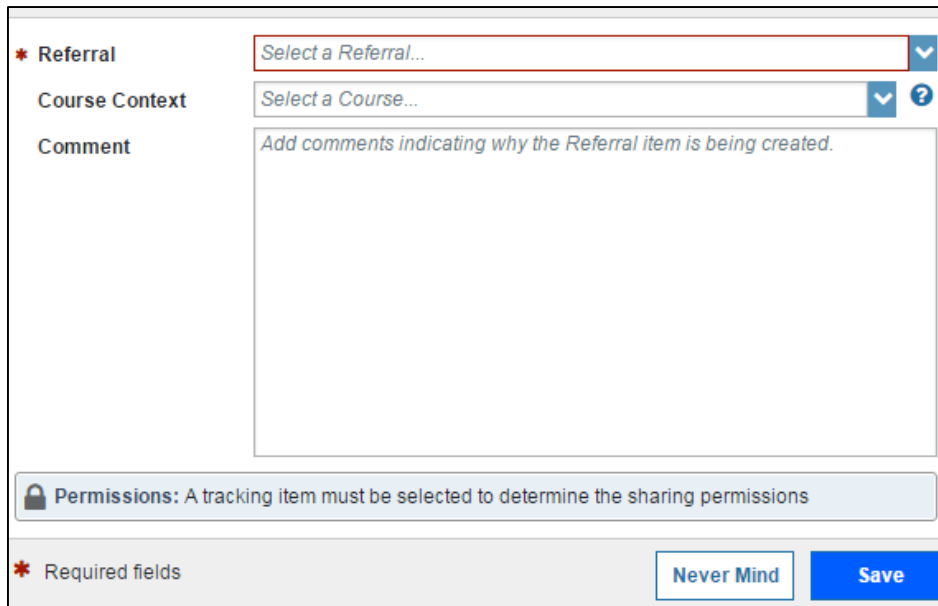
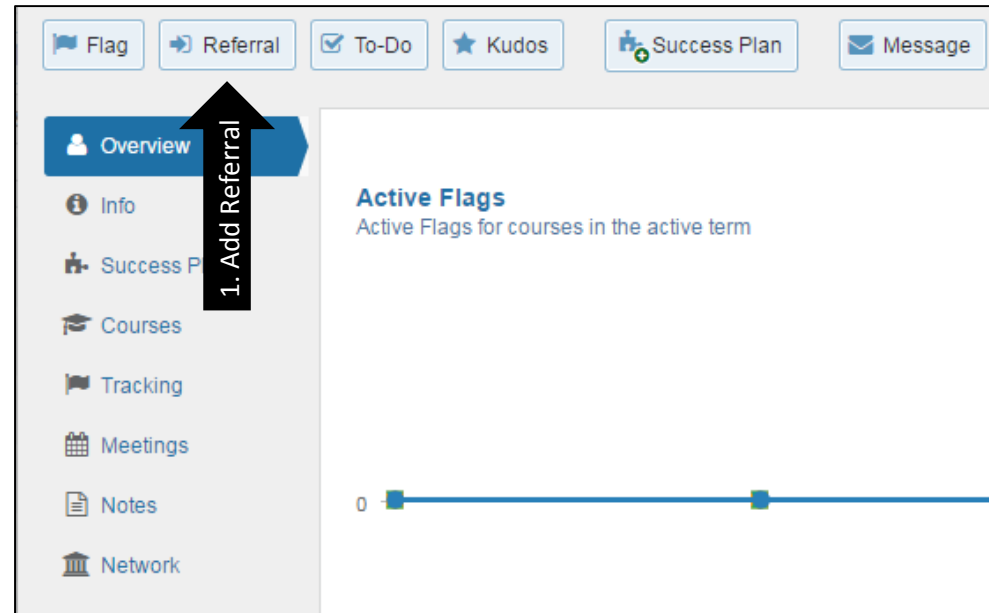
- Academic Support
- Business Office
- Student Financial Services
- Residence Hall Director
- Advisory Leadership

[More...](#)

*** Required fields**

To Assign a Referral:

1. Go to student file and click “Add Referral.”
2. It will open a new window for you to select your referral.

A screenshot of the 'Add Referral' form. The form has a title '* Referral'. It contains three main sections: 'Referral' with a dropdown menu showing 'Select a Referral...', 'Course Context' with a dropdown menu showing 'Select a Course...', and 'Comment' with a text area containing the placeholder text 'Add comments indicating why the Referral item is being created.'. At the bottom, there is a 'Permissions' section with a lock icon and the text 'A tracking item must be selected to determine the sharing permissions'. Below the form are two buttons: 'Never Mind' and 'Save'. A legend at the bottom left indicates '* Required fields'.

3. Choose the referral you would like to assign. A full list is available on the website under “Referral Descriptions and Notifications.”
4. If the referral is being raised for a particular course, indicate that in the Course Context drop-down.
5. Include any comments that would help another faculty or staff member as they provide support to the student.

6. Once you've chosen a referral, you will also see a light-blue shaded box at the bottom of the window.

This box will tell you who else may be able to see the item. Please note that students can always view referrals, and will always be emailed about them. This also means they can view any notes you include in the comments section.

This box also includes the permissions for others who can view this item and the notes you include.

7. Once you have finished adding comments and are satisfied with this referral, click save.

* Referral

Course Context

Comment *Add comments indicating why the Referral item is being created.*

Student View: The student can view this item and the notes entered above.

Permissions: People with the following roles may be able to see this tracking item if they have a relationship with the student(s):

- Advisory Leadership
- Academic Support
- Academic Affairs Leadership
- Athletic Coach
- Student Services Support

[More...](#)

* Required fields