



Discipline Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
1/7/19	Entire doc	Updated screenshots
7/12/17	Task #2	17.0.0 Updates – add updated max length to Incident Description
5/17/17	Entire doc	Updated screenshots

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Understand Discipline Code Types

Required Discipline Codes

Discipline Code Type	Description	Examples
Action Code	Disciplinary action taken by your school or district in response to any reported discipline incident(s)	<ul style="list-style-type: none">• detention• in school suspension• out of school suspension• expulsion
Infraction Type Code	Infraction committed by a student that resulted in a punishment (action)	<ul style="list-style-type: none">• bullying• assault• fighting• bomb threats• possession of weapon• vandalism
DisciplineIncidentCategory	Incident category for Civil Rights Reporting	<ul style="list-style-type: none">• bullying• religious intolerance• sexual orientation

Optional Discipline Codes

Discipline Code Type	Description	Examples
Adjudication Code	Court decision applied to a discipline incident resulting in an arrest	<ul style="list-style-type: none">• citation• conviction• fine• probation
Arrest Code	Decision whether or not to arrest a student involved in an incident and details related to any arrest	<ul style="list-style-type: none">• arrest pending• arrested for weapons violation• arrested but not for weapons violation• not arrested
Contact Type Code	Type of communication made between your school and a student's contact person(s)	<ul style="list-style-type: none">• call to guardian• letter to guardian

Optional Discipline Codes

Discipline Code Type	Description	Examples
Incident Place Code	Location where an incident occurred	<ul style="list-style-type: none"> • on school grounds • bus • field trip • school sponsored event • playground • athletic stadium
Incident Time Frame Code	Time of day when an incident occurred	<ul style="list-style-type: none"> • before school • during school • after school
Injury Severity Code	Seriousness of an injury sustained by any party as a result of an incident	<ul style="list-style-type: none"> • fatal injury • major injury • minor injury
Offender Code	Classification of person who committed a disciplinary offense	<ul style="list-style-type: none"> • student • adult visitor • intruder • district employee • parent
Parent Involvement Code	Method of involving a parent of a student involved in a discipline incident for purposes of information and/or remediation	<ul style="list-style-type: none"> • telephone conference • school conference • written notification • family counseling • law enforcement/legal involvement
Policy Code	Discipline policy specific to your school district that was violated in relation to a discipline incident	<ul style="list-style-type: none"> • unauthorized touching • fighting • attendance • behavior • bullying
Victim Type Code	Classification of a victim of an incident	<ul style="list-style-type: none"> • student • adult visitor • district employee • parent
Weapon Code	Type of weapon used in an incident	<ul style="list-style-type: none"> • knife • firearm • mace
Weapon Detected Method Code	How a weapon was detected	<ul style="list-style-type: none"> • scanner/security • detected by fellow student • detected by school staff

Task #1 - Add / Edit Discipline Codes

Navigation: StudentInformation – Management – School Administration – Discipline Administration – Discipline Code Types

1. On the **Discipline Code Types** screen, in the **Discipline Code Type** drop-down list, select the type of discipline code you want to add.

Discipline Code Types

From this screen, you can display, add, change and delete data pertaining to Discipline codes.

Discipline Code Type:

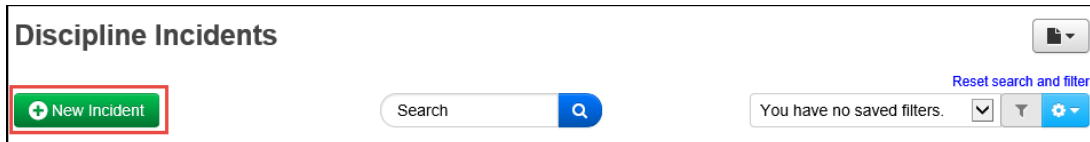
-- Select a Discipline Code Type --

Action Code
Adjudication Code
Arrest Code
Contact Type Code
DisciplineIncidentCategory
Incident Place Code
Incident Time Frame Code
Infraction Type Code
Injury Severity Code
Offender Code
Parent Involvement Code
Policy Code
Victim Type Code
Weapon Code
Weapon Detected Method Code

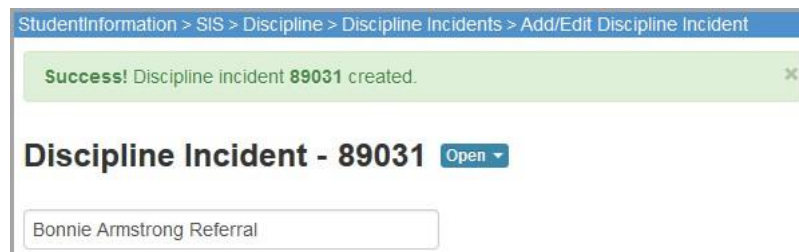
Task #2 - Add Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, click **New Incident**.
The add-edit version of the screen displays.



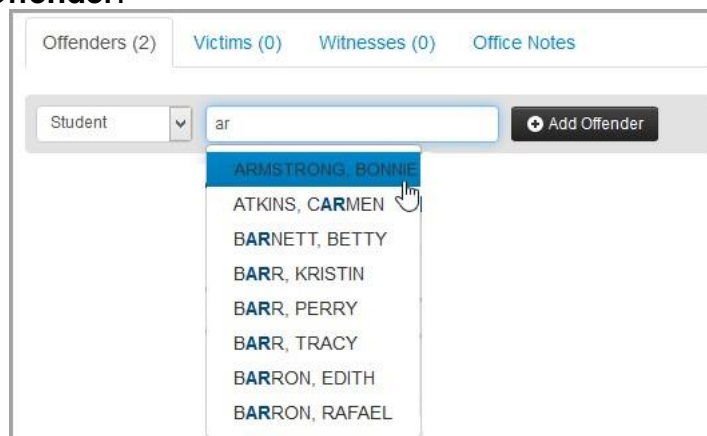
2. In the main area at the top of the screen, enter or select the following information:
 - Name you want to assign to the incident
 - Date, time and (optional) time frame during which the incident occurred (defaults to current date, current time and “During school hours”)
 - Optional: Description of the incident (maximum character length is 1950)
 - Optional: For Civil Rights reporting purposes, in the **Incident Category** area, select the appropriate check box(es).
 - Optional: General and specific location where the incident occurred (defaults to “On School Property”)
 - Optional: If the incident involved physical damage to school property, select the **Against Property** check box.
 - IRN/name of the school (defaults to building in context)
 - Optional: Person who created the referral (can be “Staff,” “Student” or “Other”)
3. At the bottom of the screen, click **Create Incident**.
4. StudentInformation creates the incident with an “Open” status, assigns it a number and displays a confirmation message.



Task # 3 - Add Offenders – required

You can add one or more offenders to each documented incident.

1. On the **Offenders** tab, in the drop-down list, select “Student”.
 - a. Enter the first couple letters of the offender’s first or last name or Student ID.
 - b. In the search results that display beneath the field, select the correct offender.
2. Click **Add Offender**.



Note: To view his/her student profile, click the offender’s name. To delete an offender, click on the **trash can** icon.

3. To document the district policy that was violated and the infraction that occurred:
 - a. Click on the **plus** sign to open the **Policies / Infractions** section, select the appropriate policy and infraction.
 - b. If applicable, enter the number of weapons involved in the incident, as well as any comments about this policy violation/infraction.

Note: To document additional policies/infractions, click the **plus** sign. To delete a policy/infraction, click on the **trash can** icon.

4. To document disciplinary action taken in response to the incident:
 - a. Click on the **plus** sign to open the **Disciplinary Actions** section, select the appropriate disciplinary action taken and the start date and end date of the action.
 - b. Enter the # of days covered by the disciplinary action (for example, 2 days of detention).
 - c. If applicable, enter any Demerits assigned to the offender and any comments about this action.
 - d. If any of the following situations apply as a result of this action, select the appropriate check box(es):
 - **Alt Education Assigned** – Student assigned to an alternative education program

- **Received Services** – Student received special education services
 - **Served** – Student completed the required disciplinary action (for example, served the detention or attended anger management classes)
- e. If applicable, select whether the offender received a **Modified Expulsion**.

Note: To document additional disciplinary actions, click the **plus** sign. To delete a disciplinary action, click on the **trash can** icon.

5. To document your contact with the offender's parents/guardians:
- a. In the **Parent Involvement** section, click the **plus** sign.
 - b. Select the name of the parent or guardian you contacted, the form of contact (such as telephone conference or written notification) and the date, as well as any additional comments.

Note: To document additional parental contacts, click the **plus** sign. To delete a parental contact, click the **trash can** icon.

Note: If you will see (*) next to the contact name, this indicates it is inactive.

6. To document any injuries and whether this offender requires a discipline letter:
- a. In the **Other** section, click >.
 - b. If you want to include a discipline letter for this offender in the **Discipline Letter Export**, select the **Needs Letter** check box.
 - c. If the offender was injured as a result of the incident, select the severity of the injury and who caused the injury.
 - d. In the **Offender Comments** field, enter any other notes as needed.

7. To document your contact with police related to this incident:
- a. In the **Law Enforcement** section, click >.
 - b. Enter the law enforcement officer's name.
 - c. If applicable, select the type of arrest and adjudication that occurred for the incident.

8. To document weapons involved in the incident:
- a. In the **Weapon Involvement** section click >.
 - b. Select how the weapon(s) were detected, the type and any comments.

9. Click **Update Incident**.

Offenders (1) [Victims \(0\)](#) [Witnesses \(0\)](#) [Office Notes](#)

Student Search...



- [Schedule](#)
- [Attendance](#)
- [Contacts](#)
- [Past Incidents](#)
-

LOVE, BESSIE Grade Level: 10 Age: 16 Gender: F

Policies / Infractions

Select policy... Weapons DFNC

defiance/disobedience/n-compl

Disciplinary Actions

Out of school suspension Demerits 0 Action Comments

2/17/2017 - 2/24/2017 # of Days 5

Alt Education Assigned * - Not Applicable

Modified Expulsion * - Not Applicable ☐ Received Services ☐ Served

Parent Involvement

Other

Student ☐ Needs Letter Offender Comments

Select injury severity type...

Law Enforcement

Law Enforcement Contact Name Select arrest type... Select adjudication type...

Weapon Involvement

Select detection method... Select weapon type... Weapon Comments

Task #4 - Add Victims – optional

You can add one or more victims to each documented incident.


1. On the **Victims** tab, in the drop-down list, select whether the victim is a “Student,” “Staff” or “Other.”
2. If you selected “Other,” enter the victim’s first and last name. If you selected “Student” or “Staff,” in the search box, search for the victim as follows:
 - a. Enter the first couple letters of the victim’s first or last name or Student ID.
 - b. In the search results that display beneath the field, select the correct victim.
3. Click **Add Victim**.
The victim’s information displays. **Note:** To delete a victim, click the **trash can** icon.
4. To document additional details about the victim:
 - a. Select a further classification (type) for the victim.
 - b. If the victim was injured as a result of the incident, select the severity of the injury.
 - c. If the injury required medical treatment, select the **Medical Treatment Required** check box.
 - d. If you referred the victim for non-medical assistance (such as counseling), select the **Student Assistance Program Referral** check box.
 - e. If applicable, enter any comments about the victim.
5. Click **Update Incident**.

[Offenders \(1\)](#) [Victims \(1\)](#) [Witnesses \(0\)](#) [Office Notes](#)

Student ▼

Search...

Add Victim




ARNOLD, VICTOR

Grade Level: 10

Age: 16

Gender: M




Referred to counseling


Select victim type... ▼



Select injury severity type... ▼

☐ Medical Treatment Required

☐ Student Assistance Program Referral

 Schedule

 Contacts

Update Incident

Cancel

Task #5 - Add Witnesses – optional

You can add one or more witnesses to each documented incident.


1. On the **Witnesses** tab, in the drop-down list, select whether the witness is a “Student,” “Staff” or “Other.”
2. If you selected “Other,” enter the witness’s first and last name. If you selected “Student” or “Staff,” in the search box, search for the witness as follows:
 - a. Enter the first couple letters of the witness’s first or last name or Student ID.
 - b. In the search results that display beneath the field, select the correct witness.
3. Click **Add Witness**.
***Note:** To delete a witness, click the **trash can** icon.*
4. Enter any comments related to the witness.
5. Click **Update Incident**.

[Offenders \(1\)](#) [Victims \(1\)](#) [Witnesses \(1\)](#) [Office Notes](#)

Student ▼

Search...

Add Witness

(staff) TURNER, HAROLD 

Witness Comments

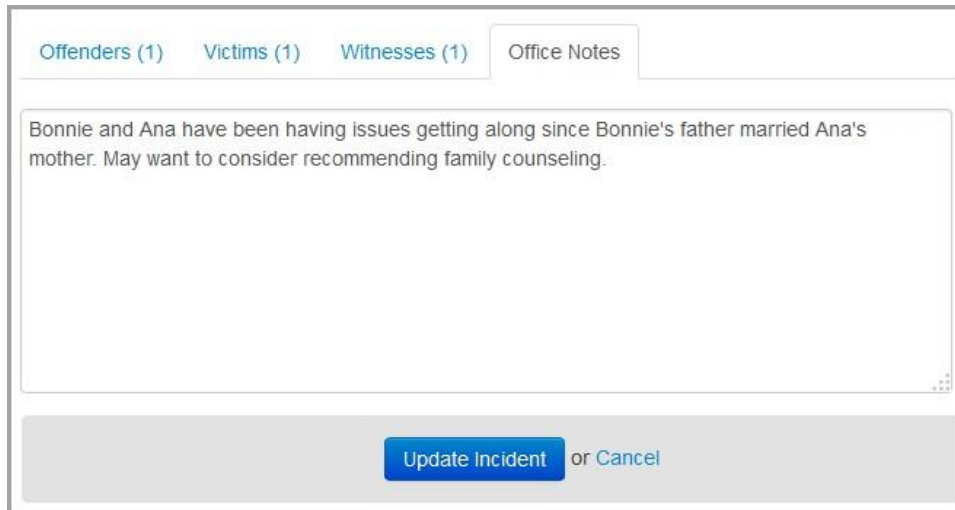
Update Incident

Cancel

Task #6 - Add Notes – optional

You can add internal notes to each documented incident. This is to capture information that should not be shared except with school staff who have access to discipline incidents in StudentInformation.

1. On the **Office Notes** tab, enter this internal information.
2. Click **Update Incident**.

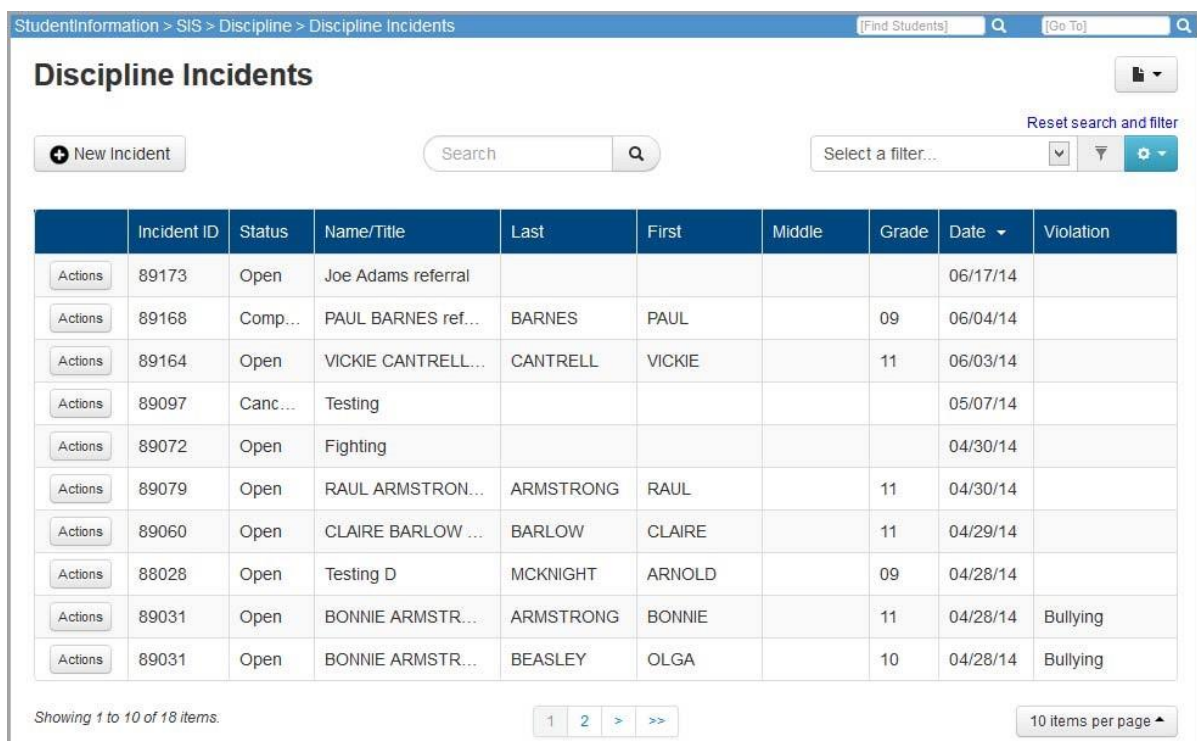


The screenshot shows a software interface with four tabs: 'Offenders (1)', 'Victims (1)', 'Witnesses (1)', and 'Office Notes'. The 'Office Notes' tab is selected and active. Below the tabs is a large text area containing the text: 'Bonnie and Ana have been having issues getting along since Bonnie's father married Ana's mother. May want to consider recommending family counseling.' At the bottom of the interface, there is a blue button labeled 'Update Incident' followed by the text 'or Cancel'.

Task #7 - View All Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, review the list of all incidents for the building and school year in context. Incident statuses are as follows:
 - **New** – Referral created in GradeBook, but not yet opened in StudentInformation.
 - **Open** – Incident opened or created in StudentInformation; in process of being investigated.
 - **Complete** – No further action needed; case is closed; you can reopen later.
 - **Cancelled** – Not needed (for instance, in the case of a duplicate incident); you can uncanceled later.



StudentInformation > SIS > Discipline > Discipline Incidents

Find Students [Go To]

Discipline Incidents

+ New Incident Search Select a filter... Reset search and filter

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	89173	Open	Joe Adams referral					06/17/14	
Actions	89168	Comp...	PAUL BARNES ref...	BARNES	PAUL		09	06/04/14	
Actions	89164	Open	VICKIE CANTRELL...	CANTRELL	VICKIE		11	06/03/14	
Actions	89097	Canc...	Testing					05/07/14	
Actions	89072	Open	Fighting					04/30/14	
Actions	89079	Open	RAUL ARMSTRON...	ARMSTRONG	RAUL		11	04/30/14	
Actions	89060	Open	CLAIRE BARLOW ...	BARLOW	CLAIRE		11	04/29/14	
Actions	88028	Open	Testing D	MCKNIGHT	ARNOLD		09	04/28/14	
Actions	89031	Open	BONNIE ARMSTR...	ARMSTRONG	BONNIE		11	04/28/14	Bullying
Actions	89031	Open	BONNIE ARMSTR...	BEASLEY	OLGA		10	04/28/14	Bullying

Showing 1 to 10 of 18 items. 1 2 > >> 10 items per page

2. Optional: To view additional incidents, use the options at the bottom of the screen to page through incidents or change the number of incidents that display per page.

Task #8 - View Student's Discipline Incidents

Navigation: StudentInformation – SIS – Student – View Profile

1. With a student in context on the **View Profile** screen, in the **I want to...** drop-down list, select "View A Student's Discipline Incidents."

ProgressBook School: BETHEL-TATE MIDDLE SCHOOL Home School: Doe, John 80426 / 06 / A

Homeroom: 115 Counselor:

StudentInformation > SIS > Student > View Profile

Doe, John I want to...

From this screen, you can view the student's profile.

Address: PO Box 100
Lima, OH 45804

Phone Number: (513) 967-5409 ☐ Unlisted

Email Address:

Parent/Guardian: Doe, Joe and Mary
H: (555) 555-5555
M: (111) 111-1111

Student Status: ACTIVE

Birthdate: 1/1/2003

Ethnicity: WHITE/NONHISPAN

Program:

Academic Locker:

Admission History: 8/17/2009 - Enrolled

EMIS Situation: 5 - Resident attending Full Time

Percent of Time: 100%

Report to EMIS: ☒

Effective Date: 7/1/2015

NO PHOTO AVAILABLE

I Want To...

- Edit This Student's Profile
- View/Edit Full Schedule
- View/Apply Fees
- View The Medical Health Log
- View This Student's Memberships
- View Today's Schedule
- View Contacts
- View Lockers
- View A Student's Family Group
- View A Student's Discipline Incidents
- View Latest Report Card
- View Student Roadmap

The **Discipline Incidents** screen displays with only those incidents in which the student in context is an offender.

StudentInformation > SIS > Discipline > Discipline Incidents

Discipline Incidents (AVERY, SANDRA) Remove student filter

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	88015	Open	Truancy	AVERY	SANDRA		10	07/29/14	Truancy

Showing 1 to 1 of 1 items.

10 items per page

2. Optional: To view discipline incidents for all students, click **Remove student filter**.

Task #9 - Search for Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, in the Search box at the top of the screen, enter any of the following search criteria:
 - Incident ID
 - Status (For example, to search for referrals you have not yet viewed, enter New)
 - Title of the incident
 - Student offender's first name, last name or grade
 - Date of the incident
 - Violation
2. Click **magnifying glass** or press <Enter>.



StudentInformation > SIS > Discipline > Discipline Incidents [Find Students] [Go To]

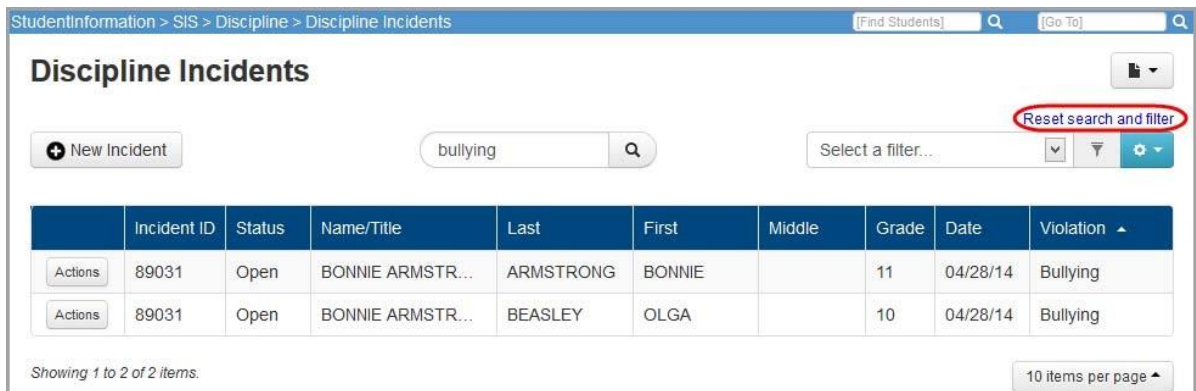
Discipline Incidents

+ New Incident

bullying

Select a filter... Reset search and filter

3. Optional: To clear the search criterion and return to the default view, click **Reset search and filter**.



StudentInformation > SIS > Discipline > Discipline Incidents [Find Students] [Go To]

Discipline Incidents

+ New Incident

bullying

Select a filter... Reset search and filter

	Incident ID	Status	Name/Title	Last	First	Middle	Grade	Date	Violation
Actions	89031	Open	BONNIE ARMSTR...	ARMSTRONG	BONNIE		11	04/28/14	Bullying
Actions	89031	Open	BONNIE ARMSTR...	BEASLEY	OLGA		10	04/28/14	Bullying

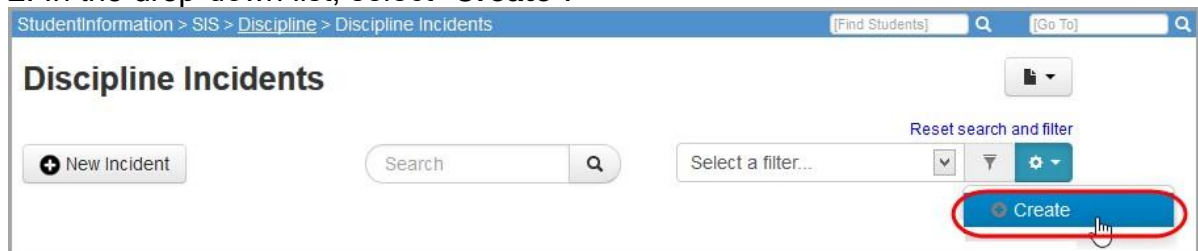
Showing 1 to 2 of 2 items.

10 items per page

Task #10 - Create Filter

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

1. On the **Discipline Incidents** screen, in the filters area at the top of the screen, Click the **gear** icon (Filter settings).
2. In the drop-down list, select “**Create**”.



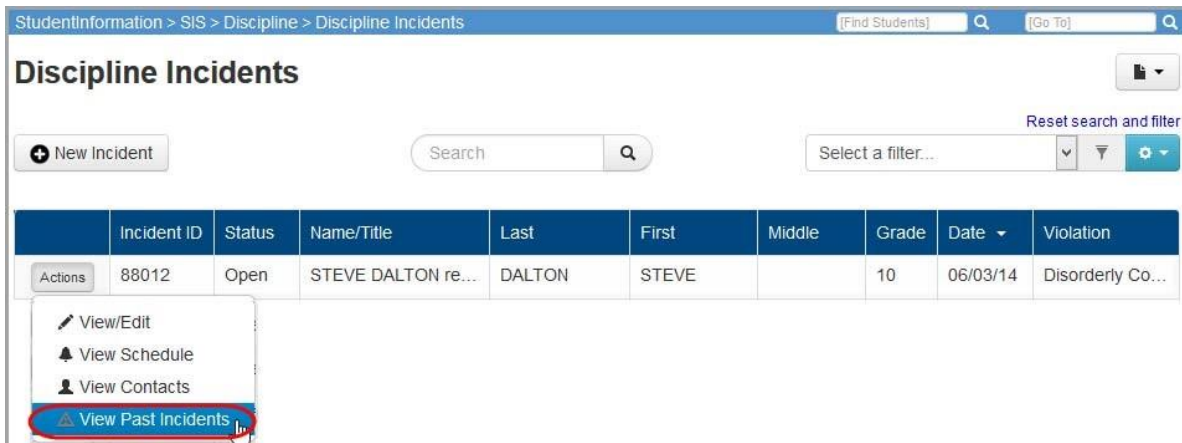
3. On the **Create Filter** window, in the top section, enter a name for the filter.
4. Optional: If you want the customized filter/sort you are creating to default every time you access the **Discipline Incidents** screen, select the **Use as default** check box.
5. In the middle (sort) section of the window, set your sort options as follows:
 - a. Select the field on which to sort the results.
 - b. Select whether the sort should be “Ascending” or “Descending.”
6. In the lower (filter) section of the window, set your filter options as follows:
 - a. Select a column on which to filter the results.
 - b. Select the operator for the filter.
 - c. Select the criterion.
 - d. Optional: To create an additional filter:
 - i. Click the **plus** sign
 - ii. In the **And/Or** drop-down list that displays to the left of the filter section, select “And” or “Or.”
 - iii. Repeat the process of entering filter criteria.
7. Click **Submit**.

Task #11 - View Offender's Past Incidents

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

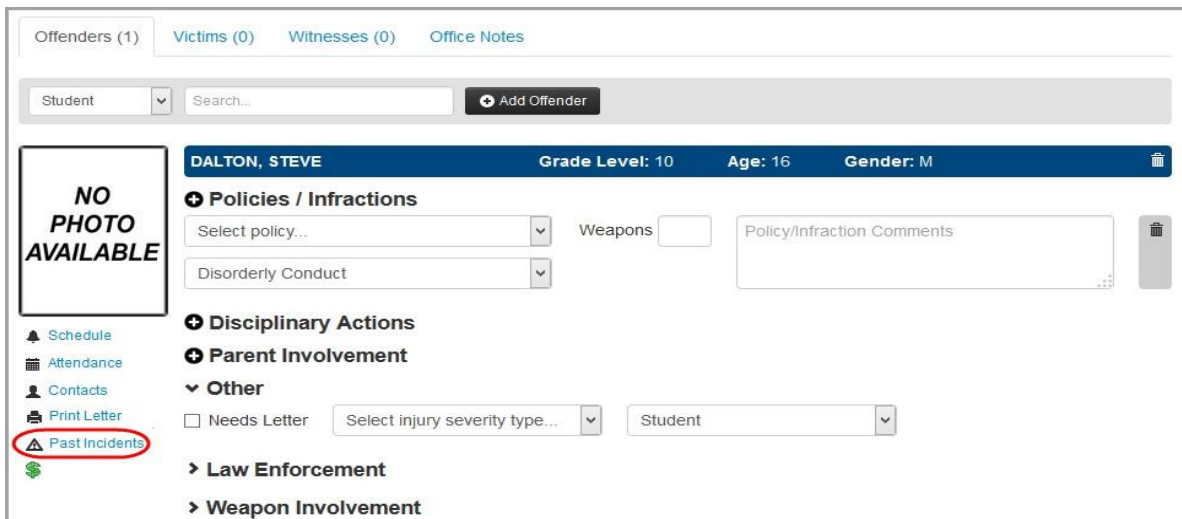
You can check to see if an offender has any past disciplinary incidents within the same school district and view details of those events.

1. Access the list of the offender's past incidents in one of the following ways:
 - From the main grid view of the **Discipline Incidents** screen:
 - a. In the row of the incident for the offender whose past incidents you want to view, click **Actions**.
 - b. In the drop-down list, select **View Past Incidents**.



View Past Incidents From Grid View

- From within the incident detail view (Add/Edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Past Incidents**.



View Past Incidents From Incident Detail View

The **Incidents** window displays, and you can review a list of the offender's past incidents.

2. Optional: To view details of a past incident, click the **Incident ID**.

Note: The link is only enabled for incidents from the school year in context. To open an incident from a previous school year, first put that school year in context.

Incidents				
DALTON, STEVE				
Incident ID	Status	Name/Title	Date	Policy/Infraction
88012	Open	STEVE DALTON referral	6/3/2014	Disorderly Conduct
88013	Complete	Inappropriate Language	4/11/2014	Unwelcome Sexual Conduct

List of Offender's Past Incidents

The incident detail view opens, and you can review the past incident.

StudentInformation > SIS > Discipline > Discipline Incidents > Add/Edit Discipline Incident [Find Students] [Go To]

Discipline Incident - 88013 Complete

Inappropriate Language

4/11/2014 12:00 AM During school hours

Student A made inappropriate sexual references towards Student B. Student B retaliated with more sexual references.

Incident Category

☐ Bullying
☐ Religious Intolerance
☒ Sexual Orientation

☐ Against Property

On School Property Select location/room...

Building IRN Staff Search for Referrer...

Offenders (2) Victims (0) Witnesses (0) Office Notes

Student Search... Add Offender

NO PHOTO AVAILABLE

DALTON, STEVE Grade Level: 10 Age: 16 Gender: M

Policies / Infractions

Select policy... Weapons Policy/Infraction Comments

Unwelcome Sexual Conduct

Disciplinary Actions

In school suspension Demerits

4/15/2014 - 4/16/2014 # of Days 2 Action Comments

☐ Alt Education Assigned ☐ Received Services ☐ Served Modified Expulsion * - Not Applicable

Parent Involvement

> Other
> Law Enforcement
> Weapon Involvement

Past Incidents

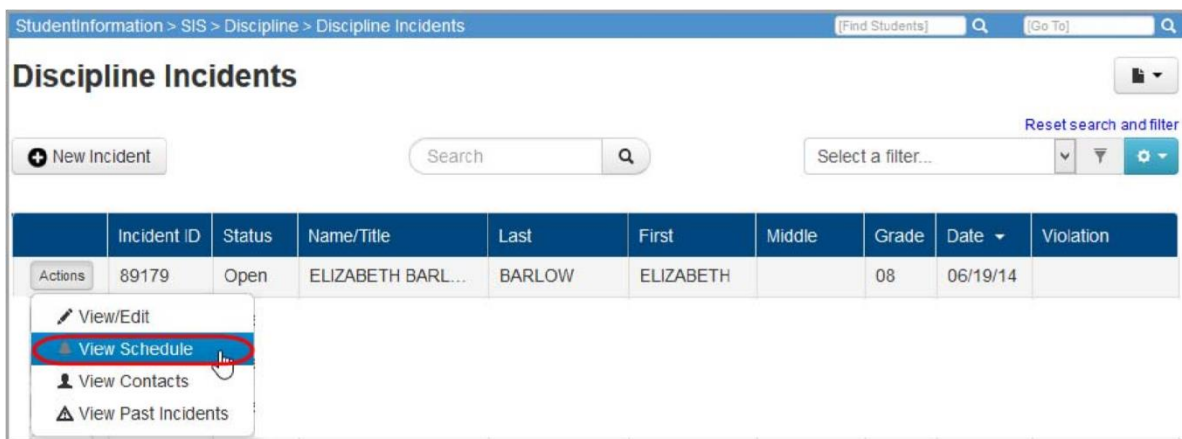
Task #12 - View Offender's Schedule

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents - Add/Edit Discipline Incident

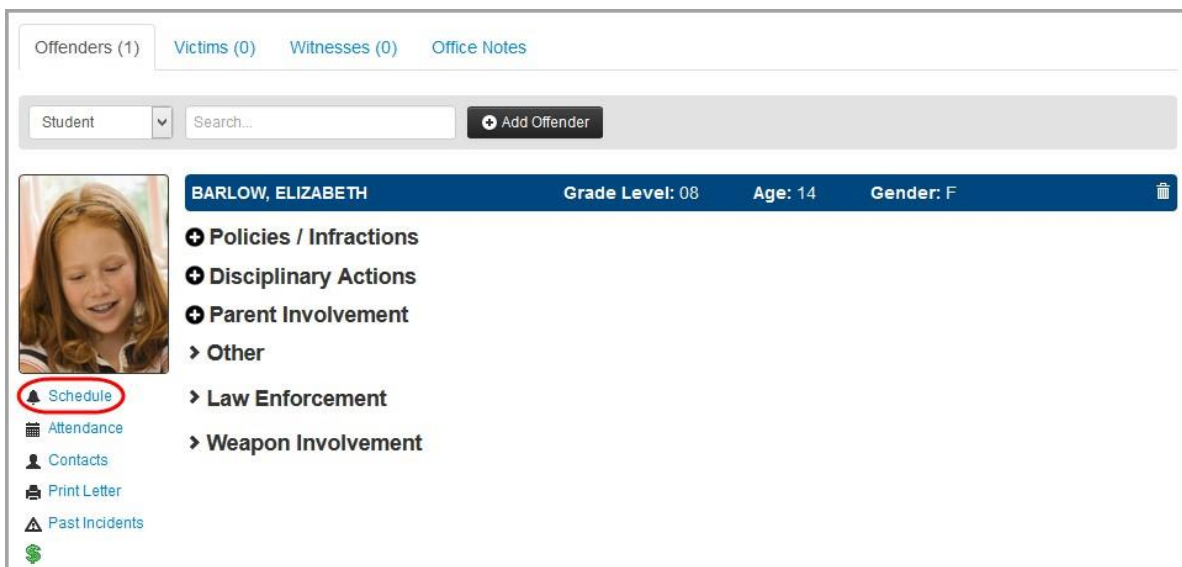
If you want to find the offender's current class location (for example, to call him/her to your office), you can look up the offender's schedule in one of the following ways:

From the main grid view of the **Discipline Incidents** screen:

- In the row of the incident for the offender whose schedule you want to view, click **Actions**.
- In the drop-down list, select **View Schedule**.



- From within the incident detail view (Add/Edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Schedule**.



Task #13 - View Offender's Attendance Records

Navigation: StudentInformation – SIS – Discipline – Discipline Incidents – Add/Edit Discipline Incident

On the Add/Edit version of the **Discipline Incident** screen, at the bottom of the screen on the **Offenders** tab, click **Attendance**.

The screenshot shows the 'Add Offender' interface. At the top, there are tabs for 'Offenders (1)', 'Victims (0)', 'Witnesses (0)', and 'Office Notes'. Below these is a search bar with a 'Student' dropdown, a 'Search...' input field, and an 'Add Offender' button. The main content area displays a profile for 'CANTRELL, VICKIE' with 'Grade Level: 11', 'Age: 16', and 'Gender: F'. To the left of the profile is a photo. Below the photo are several links: 'Schedule', 'Attendance' (circled in red), 'Contacts', 'Print Letter', and 'Past Incidents'. To the right of the photo are expandable sections: 'Policies / Infractions', 'Disciplinary Actions', 'Parent Involvement', 'Other', 'Law Enforcement', and 'Weapon Involvement'.

- On the **Attendance** window, review the attendance records.

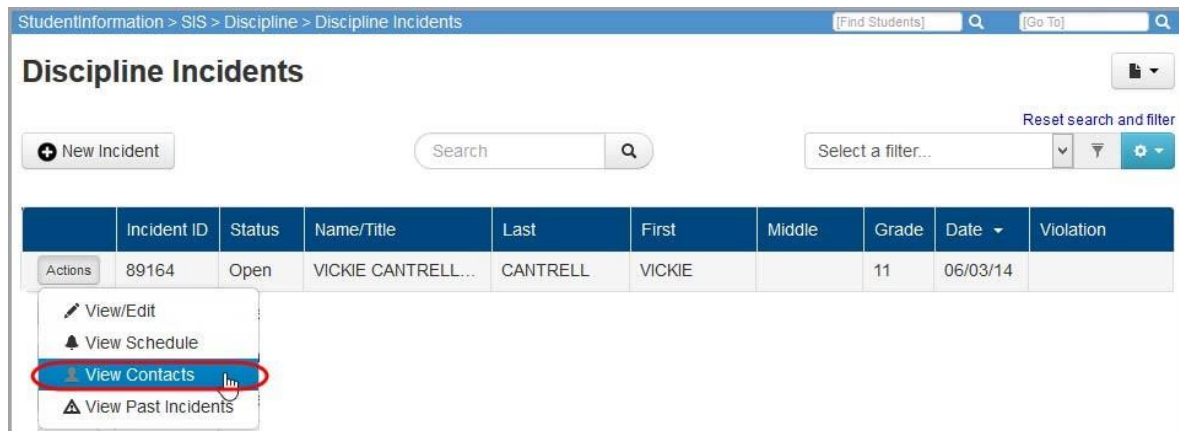
Attendance						
Date	Calendar	Absence Level	Absence Type	Reason	Note	Comment
5/15/2014	DFLT - Default	Full Absence	A - EXCUSED	003 - excused	5 - 5-DAY WARNING	
5/14/2014	DFLT - Default	Full Absence	A - EXCUSED	002 - unexcused	5 - 5-DAY WARNING	

Task #14 - Contact Offender's Parents

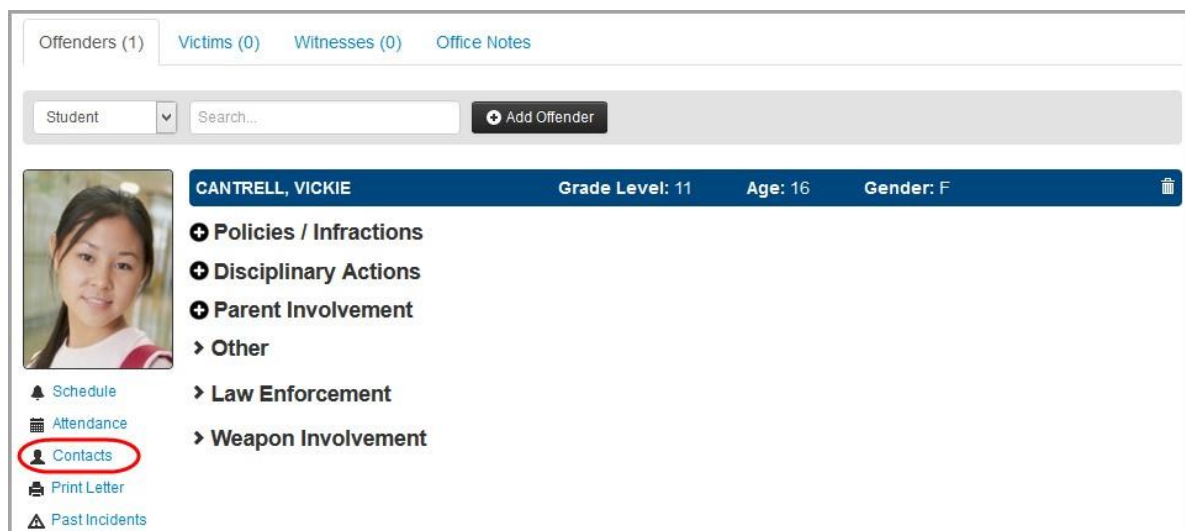
Navigation: StudentInformation – SIS – Discipline – Discipline Incidents

If you want to contact the offender's parents/guardians, you can look up their contact information.

1. Access the parent contact information in one of the following ways:
 - From the main grid view of the **Discipline Incidents** screen:
 - a. In the row of the incident for the offender whose contacts you want to view, click **Actions**.
 - b. In the drop-down list, select **View Contacts**.



- From within the incident detail view (Add/Edit version of the **Discipline Incidents** screen), at the bottom of the screen on the **Offenders** tab, click **Contacts**.



The **Contacts** window displays, and you can review the parent contact information. The student's primary contact is denoted by the gold star. Any contact who should receive a copy of discipline letters is denoted by a green checkmark in the Copied On Correspondence column.

2. Optional: To email the parent directly from this window, click the email address, and proceed to send the email using your preferred application.

Contacts				
LOVE, BESSIE				
Type	Name / Address	Phone	Email	Copied On Correspondence
Mother	WALLACE LOVE ★ 7414 LOVE Road Batavia, OH 45103-3226	Cell: (419) 555-6691	test@aol.com	
Add'l Contact	MARGE JONES PO Box 111 Batavia, OH 45103	Home: (419) 555-1738		✓