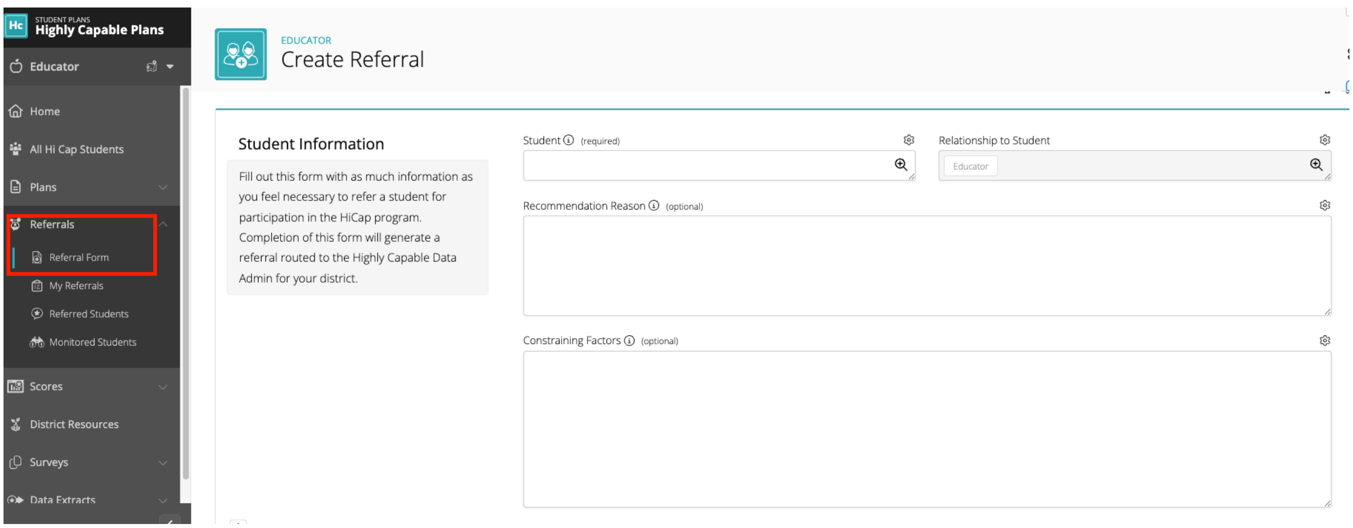
HiCap Referrals: Educators/Plan Manager (Connect)

Students can be referred in two ways:

- Individually, by someone filing out a referral form.
- In a group, based on their assessment scores.

Fill Out a HiCap Referral (Educator Only)

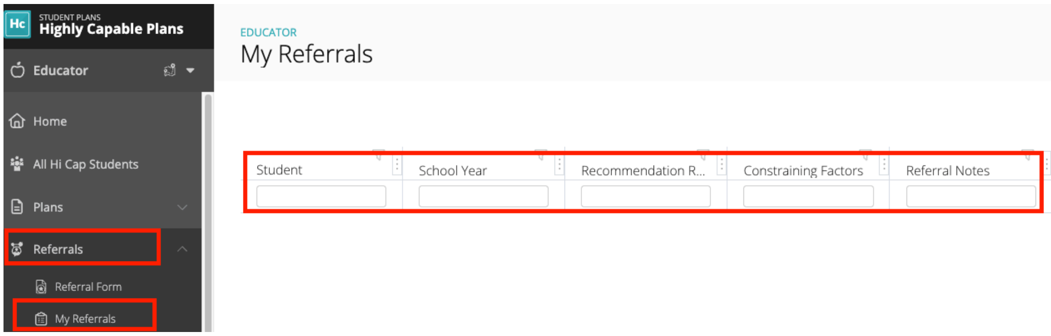
1. Start under **Referrals** in the left navigation menu and choose **Referral Form**.



2. Click the **magnifying glass** in the **Student** field, then select the **checkbox** for the student you want to refer.
3. The **Relationship to Student** field is pre-populated.
4. Enter any reasons for the referral in the **Recommendation Reason** field.
5. Fill in any more information you would like considered for this student in the **Constraining Factors** field.
6. Click **Save.**
7. Referrals may be found under **My Referrals** in the left navigation menu.

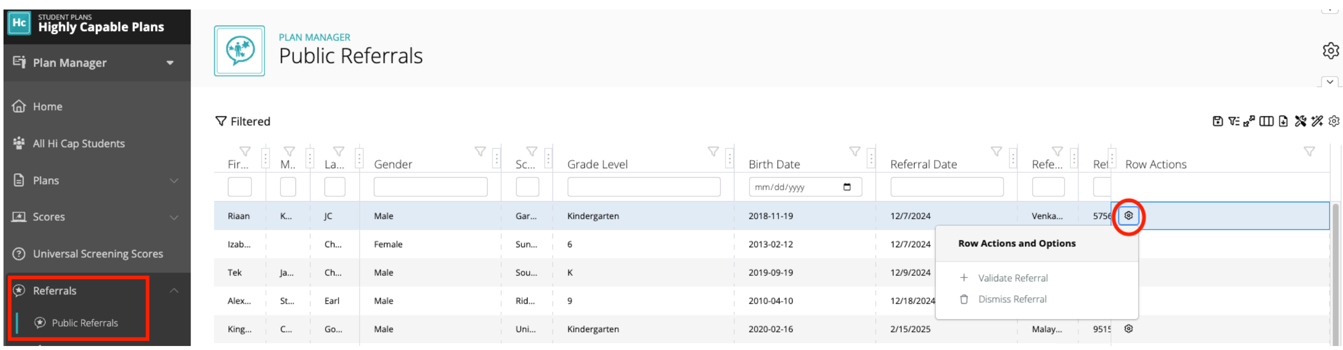
View My Referrals (Educator Only)

1. Start under **Referrals** in the left navigation menu and choose **My Referrals.**
2. You will see a list of the students you have previously referred for the Highly Capable program.
3. Use the **filter search** fields at the top of each column to filter the results displayed.

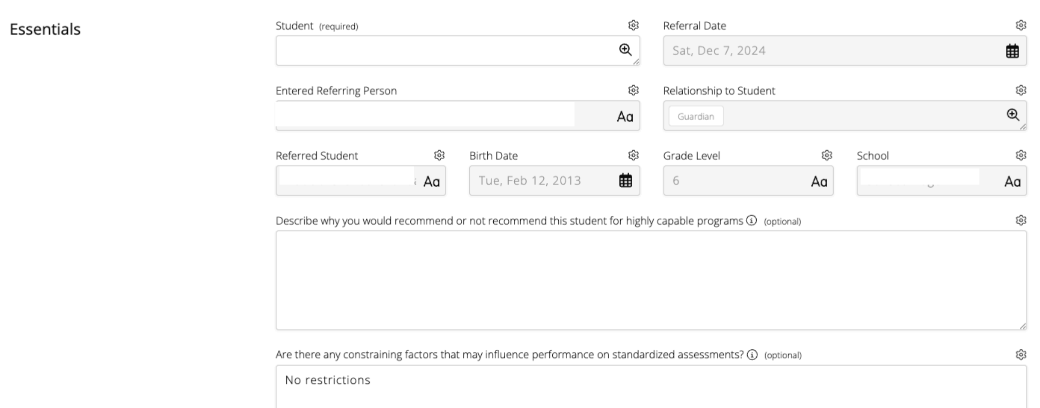


Validate Public Referrals (Plan Manager Only)

1. Start under **Referrals** in the left navigation menu and choose **Public Referrals.**
2. You will see a data table of all referrals submitted via the public referral form that have not yet been validated.



3. Click the **Row Action Gear** for the student you want to verify, then choose **Validate Referral.**
   a. In the resulting form, click the **magnifying glass** in the Student field, then select the **checkbox** for the Student to whom this referral was made.
   b. Verify the **Birth Date, Grade Level**, and **School** to make sure you have selected the correct student.
   c. Make any edits to the **Referral Recommendations** or **Constraining Factors** fields.
   d. Click **Save.**

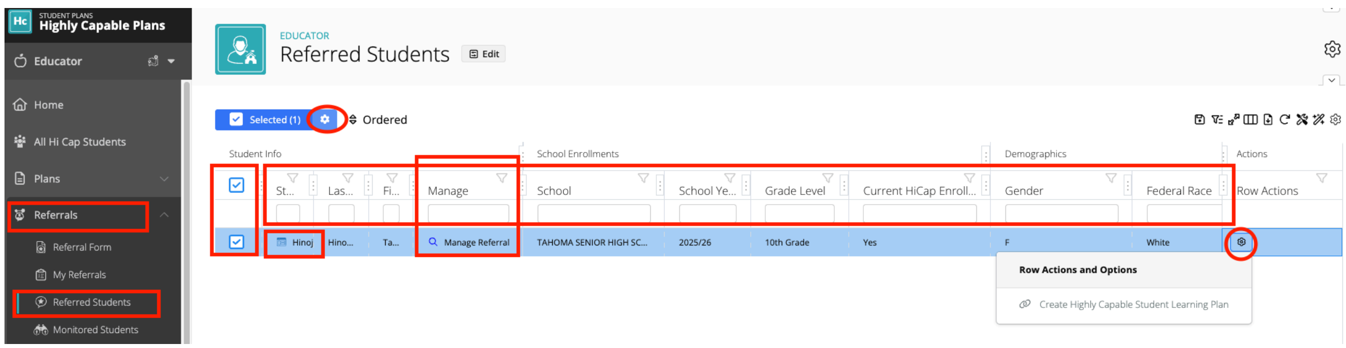


4. The validated record will no longer appear in the list by default but will now be included in the Referred Students Data Table. To view validated referrals, set the **Validated Column filter** to **Yes**.

5. Use the **Row Action Gear** and choose **Dismiss Referral** to delete duplicate or unnecessary referrals and their associated data.

Manage Referred Student

1. Start under **Referrals** in the left navigation menu and choose **Referred Students**.

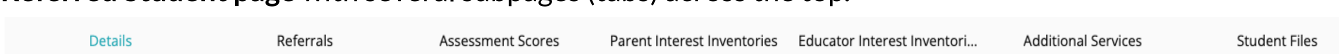


2. You will see a data table of all students referred for participation in the Highly Capable Program.

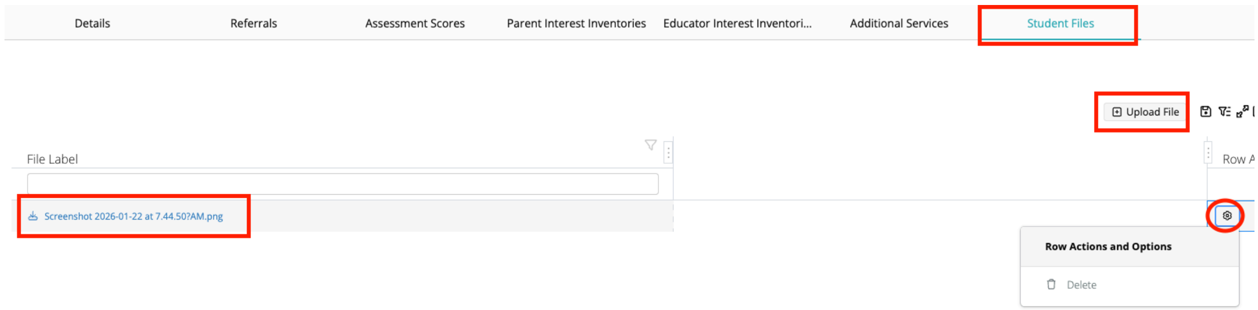
3. Click on any column **filter** field or use the other filter tools to search or narrow the list.

4. Click the **Student Name icon** in the **Student column** to view the student's dashboard.

5. Click **Manage Referral** in the **Manage column** of any student to open the **Manage Highly Capable Referred Student page** with several subpages (tabs) across the top.



   a. **Details:** This is where you can view student details and whether the parent appealed the Placement Decision. You will automatically default to the Details tab.
   b. **Referrals:** This is where you can manage who referred and validated, referral notes, date entered, relationship to the student, reasons for the recommendation, and constraining factors.
   c. **Assessment Scores:** Read-only
   d. **Parent Interest Inventories:** Read-only
   e. **Educator Interest Inventories:** Read-only
   f. **Additional Services:** Read-only
   g. **Student Files:**



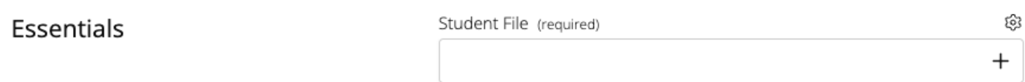
i. Click the **download icon** in the **File Label column** to download the file.

ii. Click the **Row Actions gear** to the far right to **Delete.**

   1. You will be asked to **Confirm** in a popover window. Click Yes to delete.

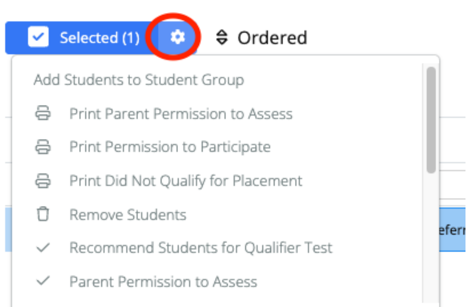
iii. Click the **Upload File button** in the top right to upload a file.

   1. Click the **"+" icon** in the **Student File** field, click the **Choose the File**, open the file, and click **Accept.**

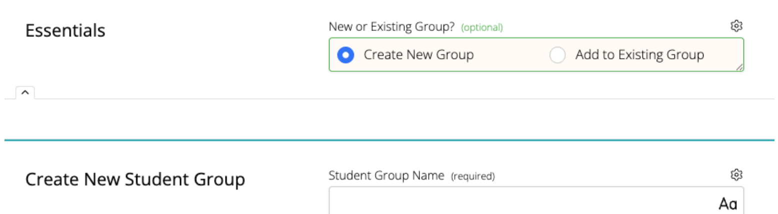


6. Click the **Row Actions Gear** and choose **Create Highly Capable Student Learning Pla**n to create a plan for the student.

7. Actions can also be updated for a group of students simultaneously.
   a. Select one or more students by clicking the **checkbox** to the far left or the top checkbox to select all.
   b. Click the **Selection Gear** at the top left and choose one of the following:



i. **Add Students to Student Group**



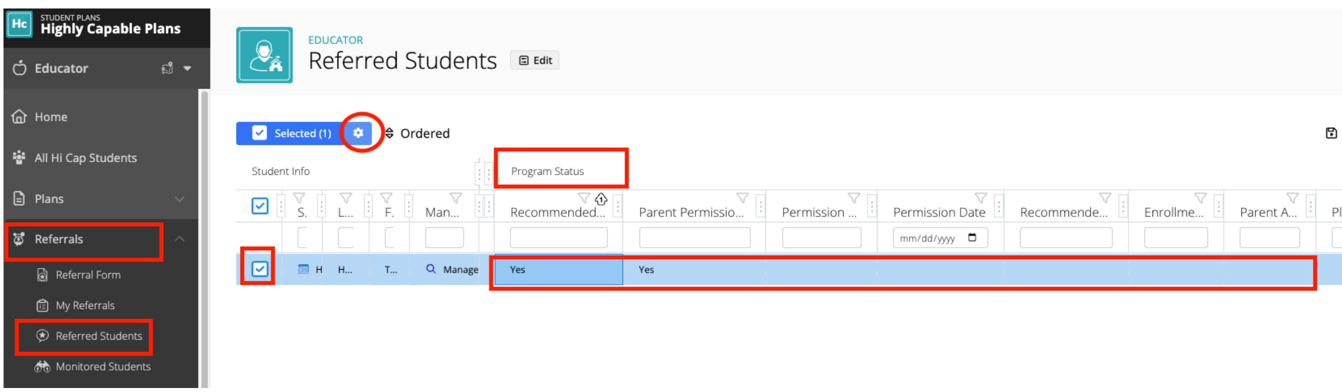
   1. Select the **New** or **Existing Group** radio button.
      a. Fill in the **Student Group Name**.

b. Or select the **Existing Student Group** by clicking the **magnifying glass** and clicking the **checkbox** to the left.

ii. **Print Parent Permission to Assess**
iii. **Print Permission to Participate**
iv. **Print Did Not Qualify for Placement**
v. **Remove students**
vi. **Recommend Students for Qualifier Test**
vii. **Parent Permission to Assess**
viii. **Recommend Students to Committee**
ix. **Enrollment Recommended**
x. **Mark Parent Accepted**
xi. **Enrollment Not Recommended**
xii. **Add Students to Hi-Cap Monitoring**
xiii. **Email Parent Permission to Assess**
xiv. **Print Parent Permission to Assess Granted Online**
xv. **Print Mailing Labels**

Manage Program Status

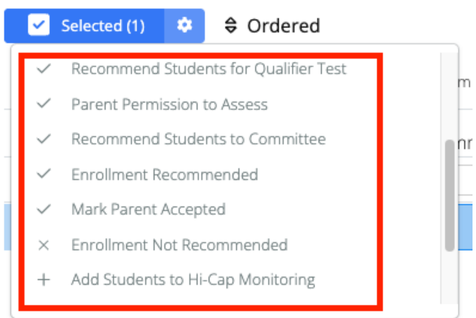
1. Start under **Referrals** in the left navigation menu and choose **Referred Students.**



2. Click on any corresponding **Program Status column cell** in the table to update each student's status. (Recommended for Qualifier, Parent Permission to Assess, Recommended to Committee, Enrollment Recommendation, Parent Accepted, or Plan)
   a. Hover your mouse over a cell near the left side until a pointer hand appears.
   b. Click **once** to change the field to **Yes.**
   c. Click a **second** time to change it to **No.**
   d. Click a **third** time to return the field to **Null.**

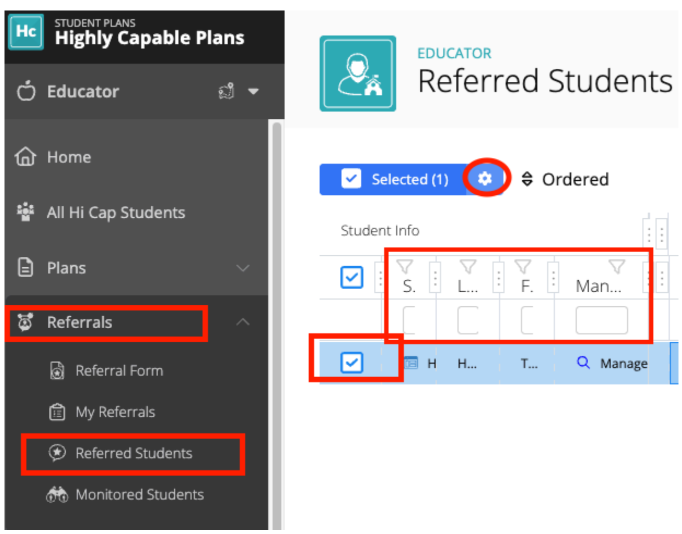
3. Statuses can also be updated en masse.
   a. Click on any **column filter** field or use the other filter tools to search or narrow the list.
   b. Click the **checkbox** at the far left for one or more students, or select the checkbox at the top of the table to choose all students.

c. Next, click the **Selected Gear** at the top left to select the status you want to update.
  i. **Recommend Students for Qualifier Test**
  ii. **Parent Permission to Assess**
  iii. **Recommend Students to Committee**
  iv. **Enrollment Recommended**
  v. **Mark Parent Accepted**
  vi. **Enrollment Not Recommended**
  vii. **Add Students to Hi-Cap Monitoring:** Enrollment is not recommended, but warrants further monitoring. Students will appear on the Monitored Student Data Table.



Generate Documents for Referred Students

1. Start under **Referrals** in the left navigation menu and choose **Referred Students.**

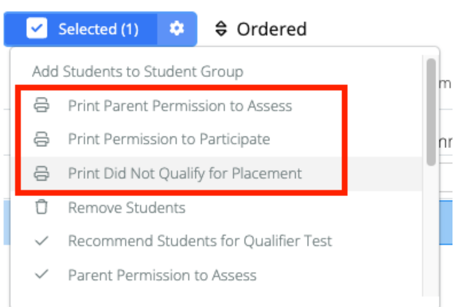


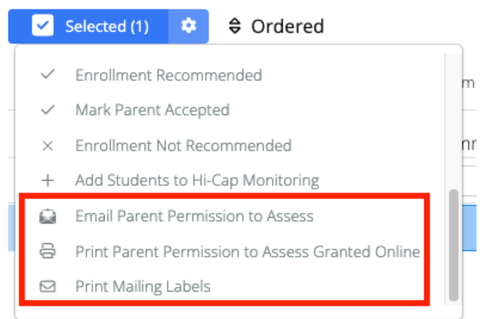
2. Click on any column **filter** field or use the other filter tools to search or narrow the list.

3. Click the **checkbox** at the far left for one or more students, or select the checkbox at the top of the table to choose all students.

4. Use the **Selected Gear** in the top left to choose the document you want to generate. Default documents include:

   a. **Print Parent Permission to Assess**
   b. **Print Permission to Participate**
   c. **Print Did Not Qualify for Placement**
   d. **Email Parent Permission to Assess**
   e. **Print Parent Permission to Assess Granted Online**
   f. **Print Mailing Labels**





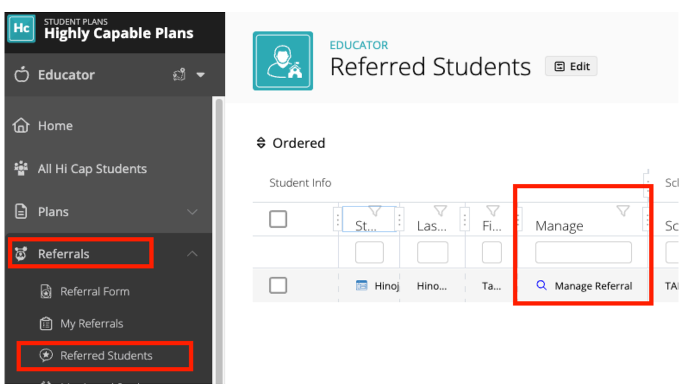
5. You will receive a pop-up notification when the file is ready to download.

Manage a Referral

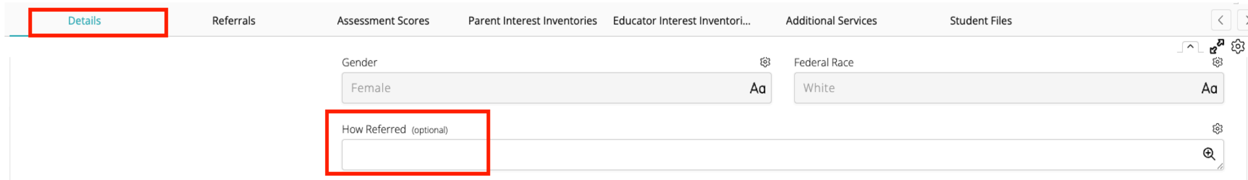
1. Start under **Referrals** in the left navigation menu and choose **Referred Students**.

2. You will see a data table of all the students referred for participation in the Highly Cap Program.

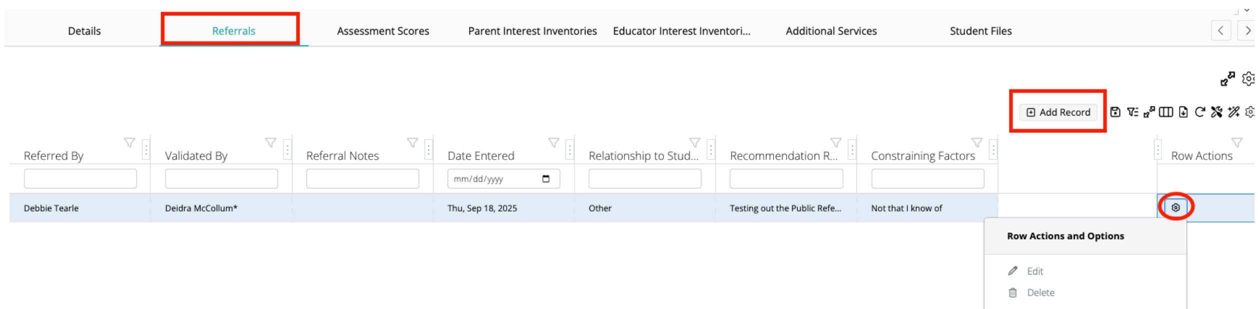
3. Click on any column **filter** field or use the other filter tools to search or narrow the list.



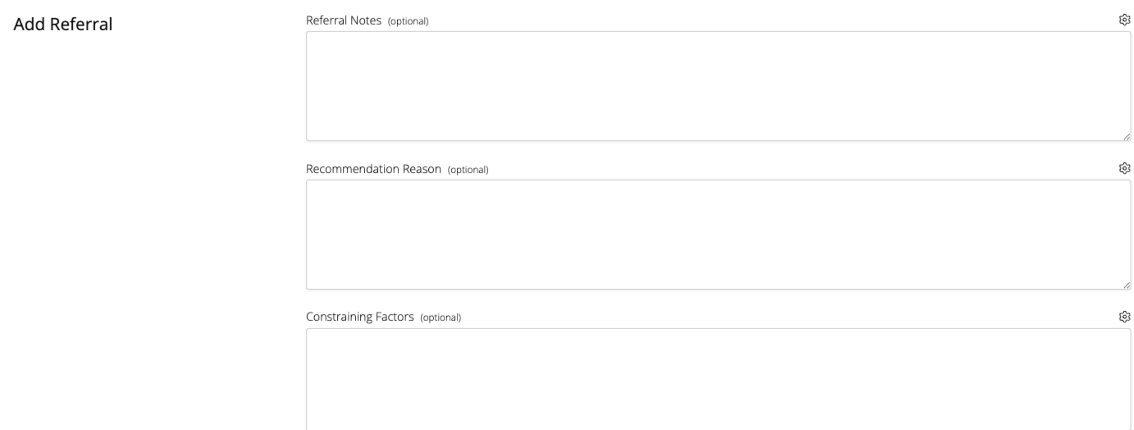
4. Click **Manage Referral** in the **Manage column** for that student.
   a. A modal will open with tabs across the top. You will default to the **Detail tab**.
   b. Scroll down to the **How Referred** field. Click the **magnifying glass** in the field, then select the state-defined option that best describes how this student was referred.
   c. Fill in any additional information in the **Notes** field directly below it.
   d. Click **Save**.



5. Select the **Referrals tab,** where you will see a table of all referrals that have been submitted for this student.
    a. Click the **Add Record button** in the top right to enter an additional referral record for this student.



    i. Fill in the **Referral Notes, Recommendation Reason,** and **Constraining Factors** fields.
    ii. Click **Save.**



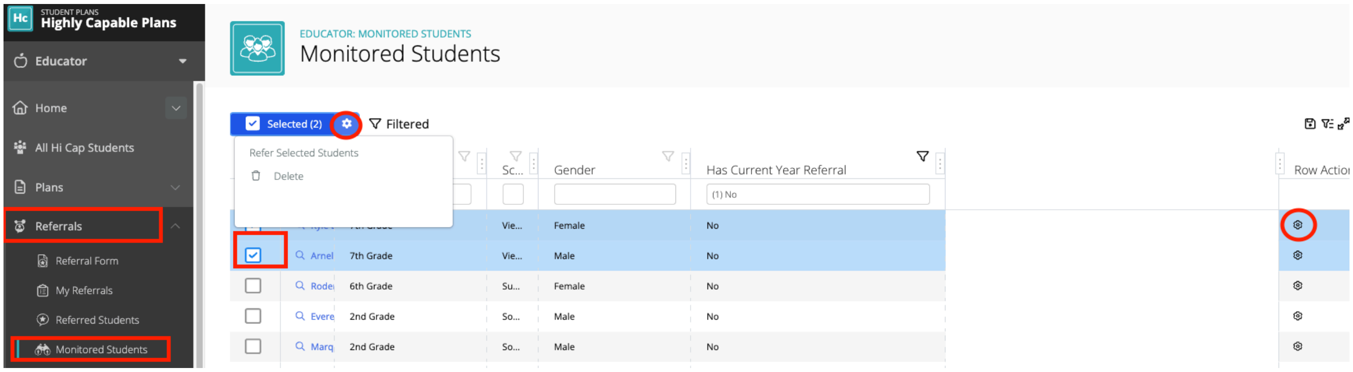
    b. Use the **Row Action Gear** to **edit** or **delete** the entry for any record.

6. The remaining four tabs, **Assessment Scores, Parent Interest Inventories, Educator Interest Inventories,** and **Additional Services,** surface read-only information about the student that may be useful when considering whether they are a good candidate for Highly Capable services.

Manage Monitored Students

Here, you will learn how to manage monitored students referred for Hi-Cap services but not selected for placement. Students can be monitored until the following year, when they can be removed or considered again.

1. Start by selecting **Referrals** in the left navigation menu, then choose **Monitored Students.**



2. A data table will display all students who have been identified for monitoring.

3. To manage the details referenced, click a **student's name** in the **Student column**.

4. Click the **Row Action Gear** and select **Delete** to remove a student from the Monitored Student table.
   a. When asked to **confirm** the deletion, click Yes.

5. Students can be referred for consideration again when the monitoring period is complete.
   a. Click the **checkbox** for one or more students at the far left of the table, or select the checkbox at the top to select all students.
   b. Use the **Selected Rows Action Gear** at the top left to choose to **Refer Selected Students.**
      i. The students will be moved to the referred students table for the current year and no longer appear on the Monitored Students list.
      ii. Select **Delete** to remove the selected student(s) entirely from the monitored list.