



Referral Guide

What is the purpose of referrals?

A referral is a tool to send students follow-up information regarding the service or office that the student should take action steps to explore. The referral information can be searched for as a population or viewed under the individual student profile.

When should I raise a referral?

You should raise a referral as a follow-up to your conversation(s) with a student, which will send the student a notification with prepopulated information from the service or office. This takes the guesswork away from you as to what information to include. This information is then logged under the “Tracking” tab on the student’s profile, where you will be able to view referral history.

What does the student receive?

When you select the referral and hit save, it will send the student a notification. You also have the option to add more information in the referral comment area. A staff member of the service or office will reach out to the student, based upon the type of referral.

***Please note that all referrals raised on students are disclosable under FERPA. This means that students for whom any referral is raised will see information about the referral(s) if/when they request a report of their student records.**

Referral Name	When is this used?	Who can raise?
Accounts Receivable Referral	Use this to refer a student to the Business Office.	Office of Financial Aid
Career Development Referral	Use this to refer a student to Career Development for major, vocational, and career exploration, internships, graduate school search and application review, job search strategies and early career jobs.	Any member of faculty or staff
Financial Aid Referral	Use this to refer a student to the Office of Financial Aid.	Instructors, Academic Advisors, Office of Financial Aid, Coordinator for Academic Success, Retention Committee
International Office Referral	Use this to refer a student to the Office of International Programs (OIP).	Any member of faculty or staff
Residence Life Referral	Use this to refer a student to Residence Life to discuss a concern related to life on campus.	Any member of faculty or staff
Tutoring Referral	Use this to refer a student to the Peer Tutoring Program or the Athletic Tutoring Program.	Course Instructors, Academic Advisors, Coordinator for Academic Success, Athletics Office (if student is an athlete)