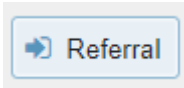# Referrals – Adding / Clearing

→] Referral   **Adding a Referral** – click on the student you want to refer (or open student's record).

1. Click the "**Referral**" button
2. From there, you have a menu to choose which area you want to refer the student to (we'll be adding more offices as the semester continues).
3. Add a **Course Context** (if applicable).
4. Add your **comments** (keep in mind that students WILL see your comments for all current referrals, excluding Refer to Dean of Students).
5. Click '**Save**'

> ⭐ **Tip:** Always pay close attention to the descriptions when selecting Options.

Clearing a Referral – If a student has been referred to you – please be sure to follow these steps upon reaching out to the student:

→]   Within the Student list (Menu > Students > Tracking Tab), find the Referral/student (or open student's record > Tracking – make sure you're looking at 'Active' Status).

1. **Hover** over the referral icon (you should see several options: i.e.: Edit / Comment / Clear
2. Click '**Clear**'
3. Add a **comment** regarding why the item is being cleared
   a. It should default to "Send a message to [Creator] to close the loop". Type in a message in that box (can be same as the comment you added to the referral/flag – this is the message the staff will receive – if same, click 'Copy my comment').
4. Click "**Submit**"

   *NOTE: If your permissions allow, you can also "**Assign**" a tracking item (follow same steps as above but click 'Assign' instead of 'Clear')*