

This document will provide some navigational tips to allow you to take better advantage of Advocate.

The Home Page

The Home Page presents you with statistics at a glance, as well as multiple ways to access information in the system.

1. Under **Actions**, you can carry out main, recurring actions in the system, such as entering an incident report or editing any reports that may have been saved as drafts.
2. The various hyperlinked options under **Incident Reports** provide statistics on current reports in the system, but also correspond to various filtered views of the incident reports (See “Filtering Lists”, below).
3. The **Search** option allows you to search all records in the system for key phrases.

The screenshot displays the Advocate Home Page for Demo University. At the top, the header includes the university logo, the 'ADVOCATE by simplicity™' branding, the date and time (Thursday, June 14, 2012 | 8:59 am), the user name (Felicity Osowski, Staff), and a 'Logout' button. A search bar and 'Return To Previous Screen' link are also present.

The left sidebar contains a navigation menu with categories like Home, Calendar, Announcements, Students, Student Groups, Incident Reports, Daily Reports, Security Reports, CARE Network, Accessibility, Federal Reporting, Reporting, Analytics, Locations, Surveys, System Settings, Tools, and My Account. Below this are sections for Developer Tools, Users Online, and Support.

The main content area is titled 'Home' and features several sections:

- ACTIONS:** A grid of buttons for 'Create Incident Report', 'Edit Draft Reports', 'View Student Track List', 'Create Security Report', 'Create CARE Report', 'Request Accommodation', and 'Create Clery Report'.
- SEARCH:** A search bar with a dropdown menu set to 'All' and a 'GO' button.
- INCIDENT REPORTS:** A list of report statuses with counts: Draft (1), Public (0), Pending (106), Processing (39), and Closed (10).
- CARE REPORTS:** A list of report statuses with counts: Public (1), Pending (3), Processing (8), Assigned (13), Monitored (0), and Resolved (0).
- ANNOUNCEMENTS:** A message stating 'There are no announcements at this time.'
- RECENT ITEMS:** A list of recent activity including email message templates, staff members, picklists, and CARE action plans and reports.

Left Navigational Menu

This navigational menu will be constant as you go from page to page in Advocate. As you hover over the menu, the double arrows at the top which appear can be used to minimize or expand the menu. Utilizing the links available here will allow you to easily jump from one tool or section to another.



1. The triangles to the left of certain items (for instance, **Incident Reports** or **Tools**) indicate a main section of the system. These triangles can be clicked to hide or expand the section to show all of the options available under that section. For instance, clicking on the triangle next to **Locations** will show or hide **Buildings/Areas** and **Rooms**.
2. When you click on an item in the navigational menu, you will automatically be shown the last item you viewed or edited in that section. For instance, if you are viewing a student record under **Students**, then you edit an Incident Report under Current Reports, if you click again on the **Students** section, you will be brought to the record of the student you were previously viewing.

Tabs

The majority of the tools or sections in Advocate, as well as incident reports themselves, have multiple tabs which you may use to access the information available. For instance, under **Incident Reports** (the list, which you may navigate to by selecting this item from the blue navigational menu) there are the following tabs:



All, Public, Pending, Processing, Closed and **Advanced Search**. In order to access reports with the indicated workflow status you may therefore click on the appropriate tab.

Advanced Search

Advanced Search will open a screen which will allow you to utilize any of the fields available in that section as parameters to search for a particular piece of information. For instance, an Advanced Search under Students will allow you to search fields available in student records to find a student, where as this tab in Incident Reports would allow you to search the available fields in an Incident Report to find a particular report.

Filtering Lists

The majority of the tools or sections in Advocate, including **Students** and **Incident Reports** sections, have a set of standardized Search Filter fields at the top of the list to assist you in refining your view. In order to utilize the filter:

The screenshot shows the top navigation bar with tabs: All, Public, Pending, Processing, Closed, and Advanced Search. Below this is a sub-tab bar with 'All Reports' and 'Incident Report Only'. A 'Keywords' search box is present with a description: 'Searches the student's name, e-mail address, student id, incident #, and description.' To the right, there are radio buttons for 'Assignment' (Mine, All) and 'Search' (Incident Report, Individual Student Report). At the bottom of this section are buttons for 'Apply Search', 'Save Defaults', and 'More Filters'.

1. Either utilize the keyword or other search components at the top of the filter or select the More Filters button to display additional search components.

This screenshot shows the advanced search filter interface. It includes the same top navigation and sub-tab bar as the previous image. The 'Keywords' search box is still present. Below it, there are several filter categories: 'Incident Type' with a dropdown menu showing options like 'Academic Integrity Violation', 'Campus Security Report (archived)', 'Campus Security Citation (archived)', 'Conduct Code Violation' (highlighted), and 'Residence Life Policy Violation'; 'Reported By User Type' dropdown; 'Location' dropdown; 'Include sub locations' radio buttons (Yes/No); 'Other Location' dropdown; 'IR Status' dropdown; 'Assigned To' dropdown; 'Assigned To Group' dropdown; and 'Include Closed Cases' dropdown (set to Yes). At the bottom are buttons for 'Apply Search', 'Clear', 'Save Defaults', and 'Fewer Filters'.

2. Enter the search/filter parameters.
3. Click **Apply Search**.
4. Remember to select **Clear** before performing another search, to view the entire list or before you navigate to another section of Advocate. Advocate will return you to the filtered list if you leave the search parameters in place and navigate back to that section after viewing another section of the system.
5. You may create a customized default view by carrying out the above steps and then selecting **Save Defaults**.

Tip: While you can define and save defaults so that you can return to a preferred view of the list, you will find that many default views are already set for you and correspond to the links on the Home Page. For instance, if you wished to see all of the individual incident reports which are currently in pending, you can instead choose **Pending** under **Incident s** on the **Home Page**.

Returning to Previous

As a web based application, in order to allow you “back button capability” without navigating you right out of Advocate, in addition to the ease with which you can move from one part of the system to the other with the left navigational menu, we have also provided contextual links in the upper right hand of the application which will allow you to go back to previous screens.

While the options will change as you navigate from one section of the system to another in sync with your current location in the system, you will find these options consistently in the upper right hand corner of your screen.

For instance, if you are in a child or individual incident report, you may choose **Return to Previous Screen**, which will bring you back to the last screen you visited, or you may choose **Return to List (Current Reports)** which will navigate you to the list of incident reports from which you accessed the report.



Submit Versus Save

While these buttons both control the save function, they have navigational features embedded in them. When adding or editing a record, clicking **Submit** will bring you back to the list of which the record is a part. For instance, when editing or adding a student record, submit will return you to the main list of students. Selecting **Save** will provide you with a read only version of the record you just edited.

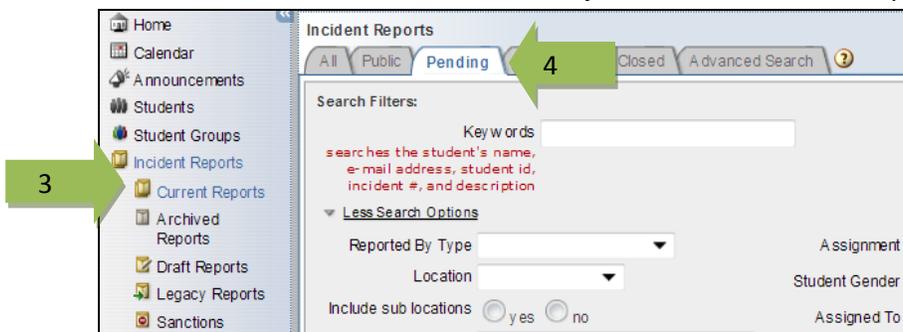
■ Incident Lifecycle

- This guide offers a quick overview of the general lifecycle of an incident, from creation to completion. There are many more features to Advocate that are not covered here.

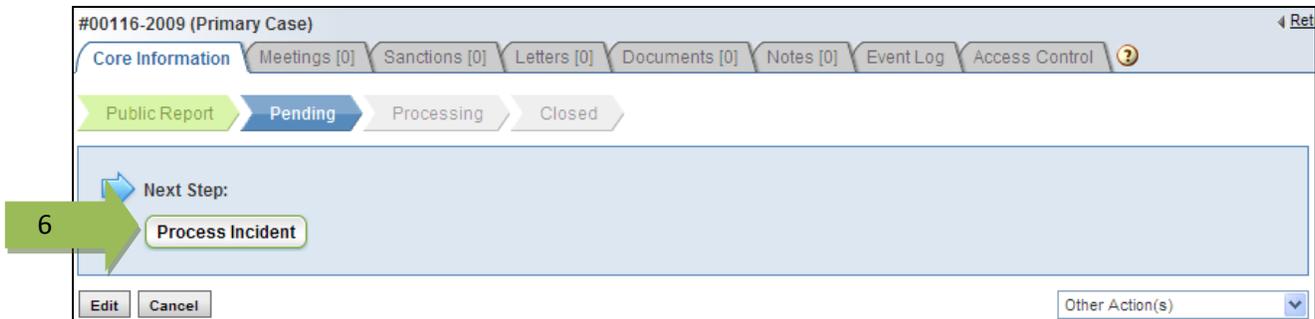
1. Create a new incident report by clicking on green **Create Incident Report** button on the home page.



2. Complete the form and click on:
 - a. **Submit** to take you to the list of incident reports.
 - b. **Save** to take you to a read-only version of the new incident report to begin processing.
3. To Process a case, click on **Current Reports** under Incident Reports in the Navigation Bar.

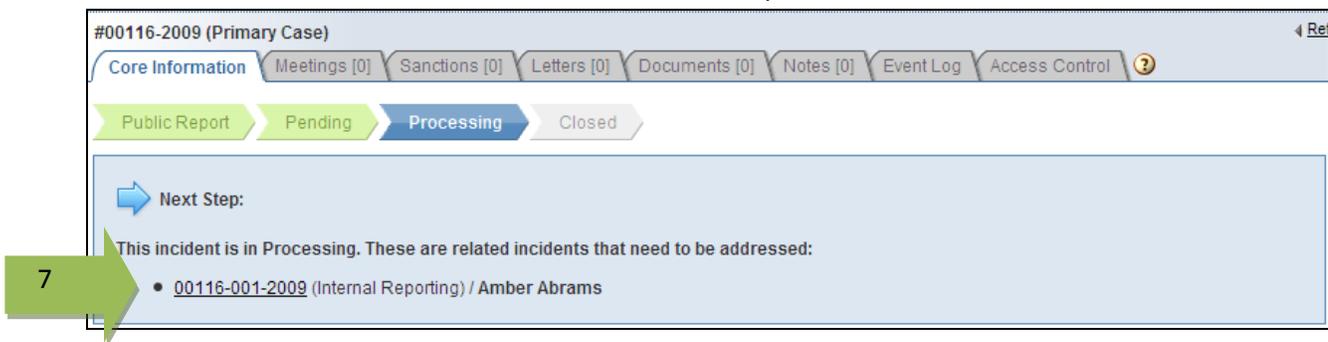


4. Click on **Pending** to view the list of cases that need to be processed.
5. Select a case to Process.
6. Once viewing the details of a case use the **Workflow Next Steps** to create the “child” cases for each student by clicking on the **Process Incident** button.

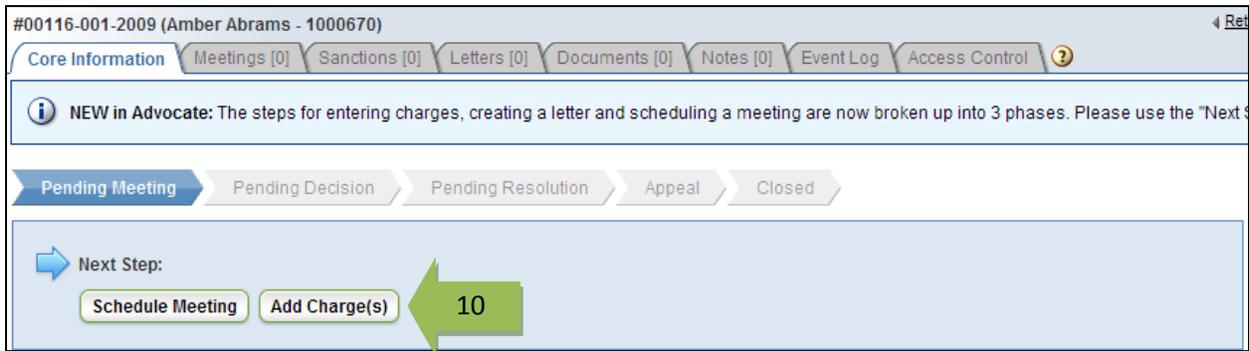


This will create an individual case for each student, whether there is 1, 10, or 100 students. Each will have a unique case number related to the primary report number. This number is created by assigning a consecutive number to each person involved and interjecting this number between the two parts of the parent report. For instance, 02354-2009 will have 02354-001-2009 and 02354-002-2009 assigned individual case numbers to two involved students.

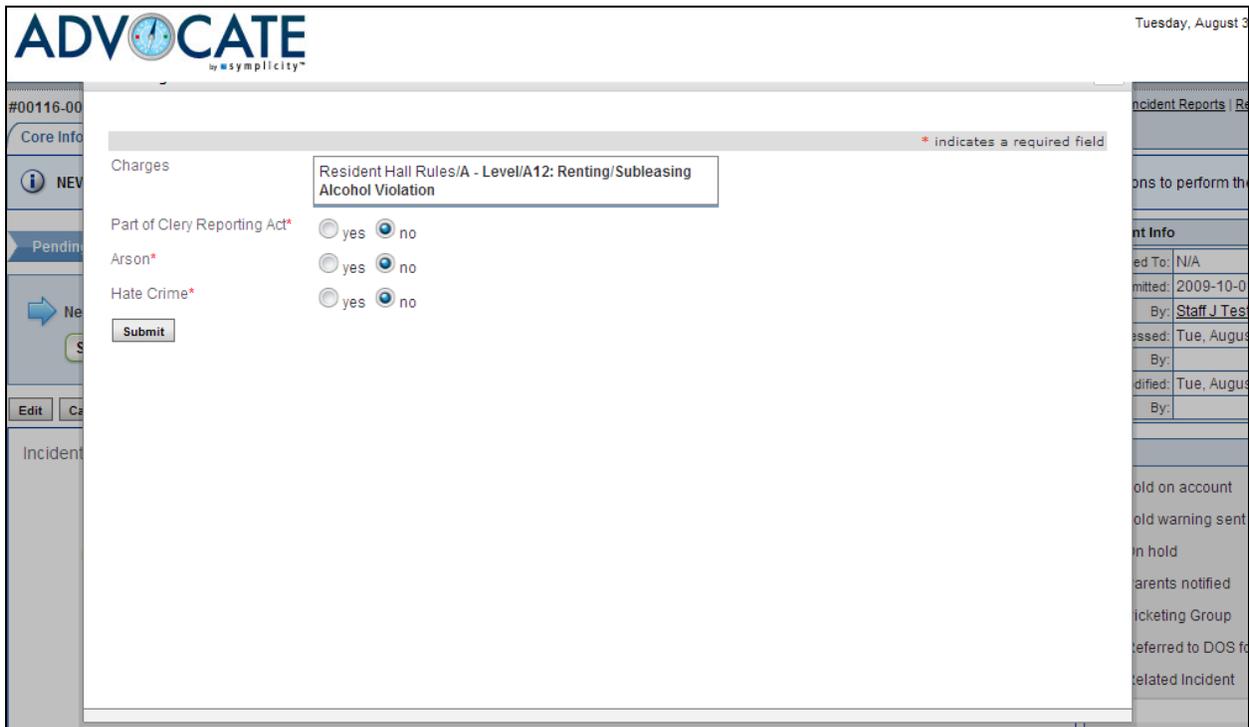
7. Click on one of the individual case numbers at the top of the screen in this blue box.



8. Your next step offers you two options: **Schedule Meeting** or **Add Charges** (you can do either of them in either order).
9. Select which ever option makes the most sense for your process.
10. In this scenario, we will enter charges first by clicking on the **Add Charges** button



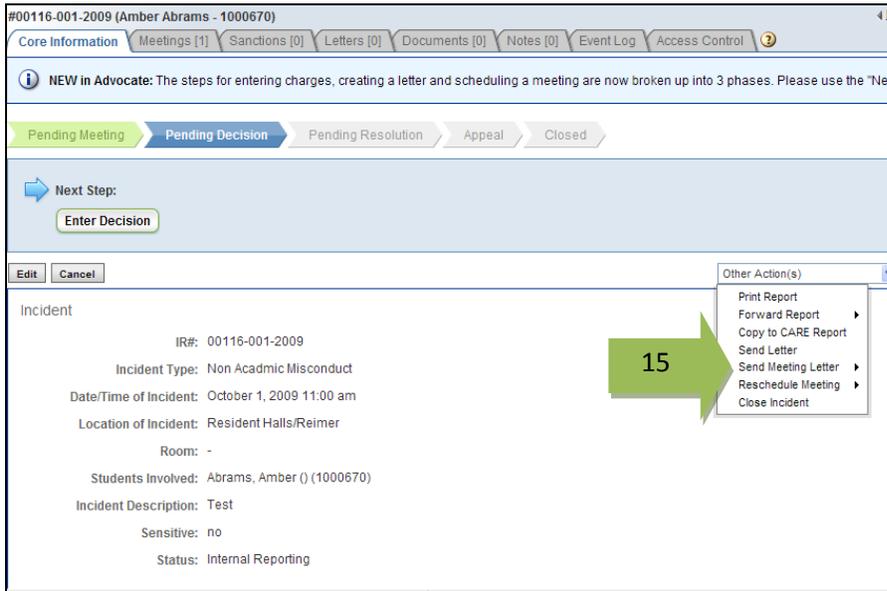
11. A new window appears for you to enter your charges and Clery information as needed.



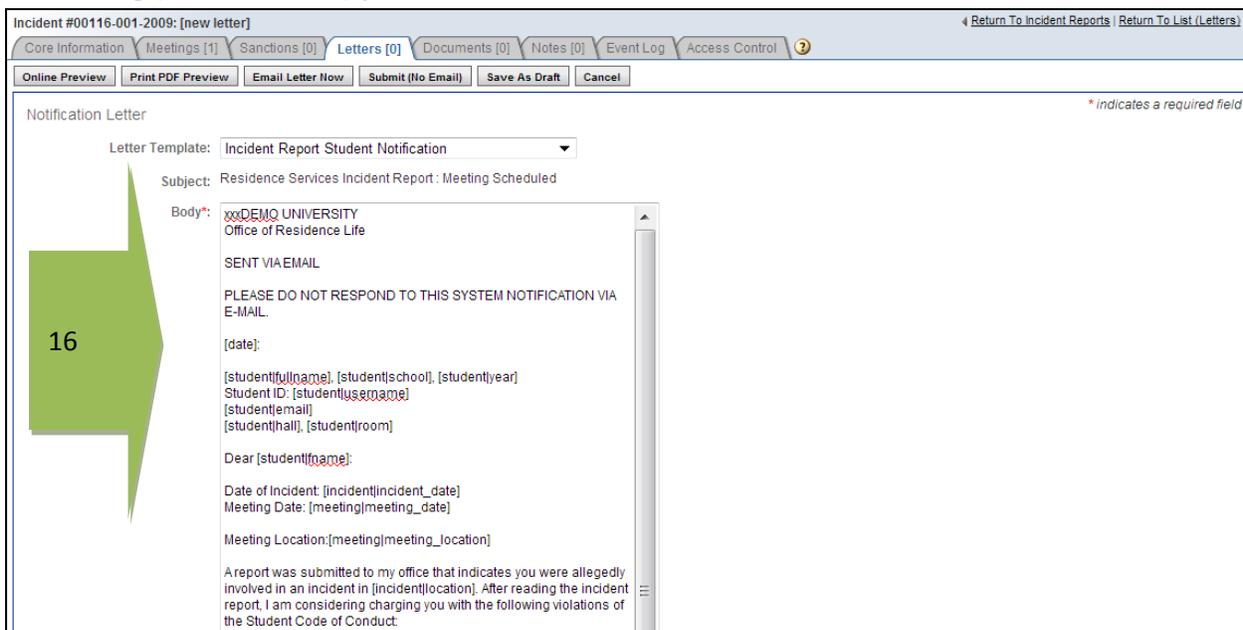
12. You now have the option to schedule your meeting, or enter a decision. You can also note that your charges are now located in a Sidebox on the right side of the screen. They will remain there throughout the process and can be edited at any time.

13. For this process, we will schedule a meeting with the student by clicking on the **Schedule Meeting** button.
14. Fill out the form and either save/submit this (to be saved in your Meetings tab) or **Save & Create Letter** will take you to the letter stage. Again, note that your charges can be edited in the Sidebox

- To send a letter to a student, you may Save & Create Letter from the meeting, or if you save/submit your meeting, you may also **Send a Meeting Letter** from the Other Actions menu once you are in the Core Information tab.



- Fill out the letter form by selecting your letter template and then Printing, Emailing or Submitting (without email) your letter. It will then be saved under the Letters Tab.



17. You may now enter your decision and assign any sanctions to the student by clicking **Enter Decision** in the Workflow area. (Decision is also now in the Sidebox to be edited at any time.)

The screenshot shows the Advocate software interface for incident #00116-001-2009. The workflow progress bar indicates the current step is 'Pending Decision'. A message box states: 'A new "Incident Report Student Notification" letter was saved.' Below this, the 'Next Step' is 'Enter Decision', highlighted by a green arrow labeled '17'. The main content area displays incident details: IR# 00116-001-2009, Incident Type: Non Academic Misconduct, Date/Time: October 1, 2009 11:00 am, Location: Resident Halls/Reimer, Room: -, Students Involved: Abrams, Amber (1000670), Incident Description: Test, Sensitive: no, Status: Internal Reporting. On the right, there are sidebars for 'Incident Info', 'Flags', and 'Charge Information'.

18. Select which charges (if any) the student is responsible for (you can click on them from the Charges section and they will populate automatically in the Responsible for section below).

The screenshot shows the 'Enter the decision' form in the Advocate software. A green arrow labeled '18' points to the 'Charges' dropdown menu. The 'Responsible For' field is populated with 'Resident Hall Rules/A12: Renting/Subleasing' and 'Alcohol Violation'. The 'Aggravating Factors' field is empty. The 'Rationale' field is a large text area. The interface includes a navigation bar, a message box, and several sidebars for incident details, flags, and charges.

19. You may now either Save and Add Sanctions or just Save/Submit the decision. If you choose to Save/Submit, you may enter charges later from the Core Information and the Workflow by choosing to **Enter Sanction**.

20. Once you are in the Sanction screen, you may add as many sanctions as needed with the Add Additional Sanctions button. You may either Save/Submit your sanctions, or **Create Letter** to inform the student of your decision. (If you do not send a letter here, you may do it from the Other Actions menu on the Core Information page.)

21. Create your decision letter, using the drop down menu to select your letter template. Fill the form out and choose if you wish to Print, Email or Submit (no email) at this time.

Incident #00116-001-2009: [new letter] Return To Incident Reports | Return To List (Letters)

Core Information Meetings [1] Sanctions [1] Letters [1] Documents [0] Notes [0] Event Log Access Control ?

Online Preview Print PDF Preview Email Letter Now Submit (No Email) Save As Draft Cancel **21**

Notification Letter * indicates a required field

Letter Template: Incident Meeting Follow-Up

Subject: Residence Services: Incident Meeting Follow-Up

Body:

SENT VIA EMAIL
PLEASE DO NOT REPLY TO THIS SYSTEM EMAIL

[date]

[student|fullname], [student|school], [student|class]
Georgetown ID: [student|school_student_id]
[student|email]
[student_location] [student|room]

Dear [student|fname]:

This serves as your official Notice of Administrative Action letter. Following our meeting, you are hereby officially notified of violations for which you have been found responsible for [admin_action|rationalale] and their accompanying sanction:

If you would like to appeal this decision, please click on the following link: [appeal_link]

22. You may now choose to Close the Incident, Enter Sanctions follow up (mark completed or deadline missed) or enter a Student Appeal (which has a Workflow similar to processing a case. You can continue to edit sanctions and decisions in the Sidebars as needed, as well.)

NEW IN Advocate: The steps for entering charges, creating a letter and scheduling a meeting are now broken up into 3 phases. Please use the "Next Steps" buttons to perform these actions.

Pending Meeting Pending Decision Pending Resolution Appeal Closed

✓ A new "Incident Meeting Follow-Up" letter was saved.

Next Step:

Close Incident Sanction Followup Student Appeal

Edit Cancel Other Action(s)

Incident

IR#: 00116-001-2009

Incident Type: Non Acadmic Misconduct

Date/Time of Incident: October 1, 2009 11:00 am

Location of Incident: Resident Halls/Reimer

Room: -

Students Involved: Abrams, Amber () (1000670)

Incident Description: Test

Sensitive: no

Status: Responsible

Administrative Action

Incident Info

Assigned To:	N/A
Submitted:	2009-10-01 18:52:47
By:	Staff J Test
Processed:	Tue, August 31, 2010, 12:52 am
By:	
Modified:	Tue, August 31, 2010, 1:21 am
By:	

Flags

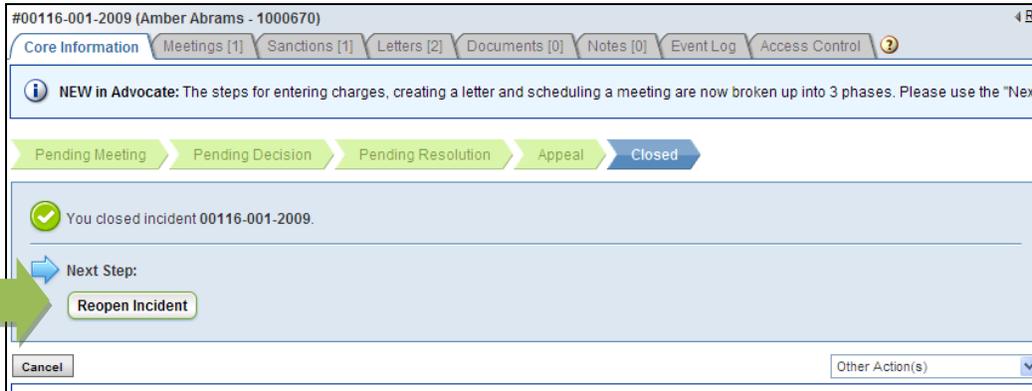
- hold on account
- hold warning sent
- On hold
- Parents notified
- Picketing Group
- Referred to DOS for Sanctions
- Related Incident

Charge Information

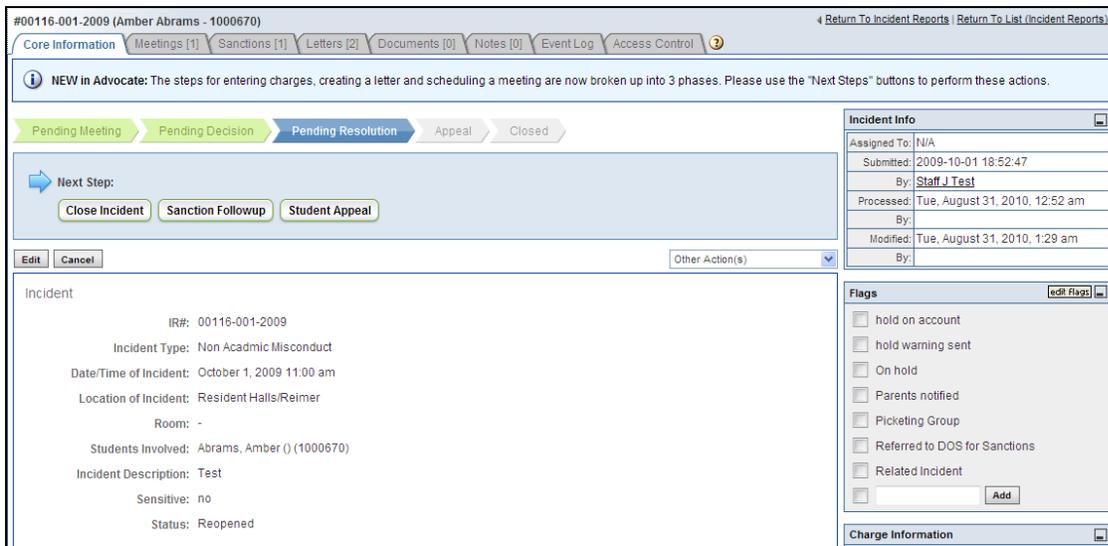
Charges	Alcohol Violation Resident Hall Rules/A - Level/A12: Renting/Subleasing
Part of Clery Reporting	no

23. If you have closed your incident and need to reopen it to edit anything or send it into appeal mode, you can click Reopen Incident.

23



24. Once a case is reopened, you will see the same options you had prior to Closing the case (Close Incident, Sanction Followup and Student Appeal).



Note: Once they have been entered, you may modify your charges, decision and sanctions at anytime the case is open from the Sideboxes

Title IX Report Lifecycle

The Title IX module of Advocate provides unique workflow options to help track and respond to Title IX related issues that may fall outside of the student conduct process. This guide will provide a basic overview of workflow options including Title IX Actions and will highlight system settings to help configure the system to meet your campus needs.

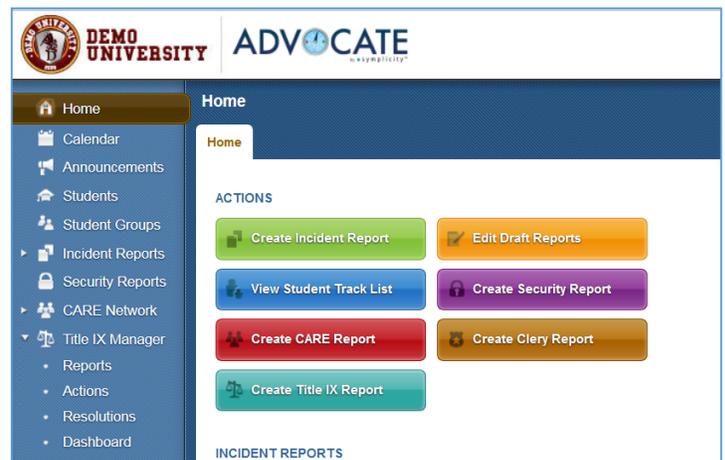
Collecting Title IX Reports

Title IX Reports can be created through 3 different methods:

- Title IX Reports can be entered by a user who is logged in to Advocate;
- CARE Reports and Incident Reports can be promoted to create Title IX Reports; and
- Title IX Reports can be collected through a public reporting process.

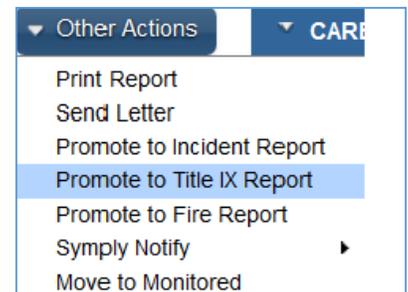
Internally Created Reports

1. To create a report as a user who is logged in to Advocate, through the Home Page you can select the teal “Create Title IX Report” button on the home page.
2. Complete the form and click on:
 - a. “Submit” to take you to the list of Title IX Reports.
 - b. “Save” to take you to a read-only version of the new Title IX Report to begin processing.



Promoted Reports

1. To create a Title IX Report from an Incident Report or a CARE Report, you can select the option to “Promote to Title IX Report” from the “Other Actions” and “Actions” menus in each type of record respectively.
2. When escalating a report from either area, there are some System Settings that you can put into place to help map the information in the fields of the originating report into the fields held within your Title IX Report form in addition to any other report editing you feel is appropriate.



Settings associated with this process can be found in:

- System Settings>Title IX Reports>Escalation>Setting #2: Incident Report to Title IX Escalation Map;

- System Settings>Title IX Reports>Escalation>Setting #3: Include Notes and Documents From Originating Report; and
- System Settings>System Modules>Security Report>Setting #5: CARE Report to Title IX Report Escalation Map.

NOTE: Please see the "CARE-IR Escalation" document for further details.

3. Complete the form and click on:
 - a. "Submit" to take you to the list of Title IX Reports.
 - b. "Save" to take you to a read-only version of the new Title IX Report to begin processing.

Public Title IX Reports

1. Your Advocate system supports the collection of public reports through a public facing webpage or through the student interface if either is enabled on your campus.
 - a. The address for your institution's public Title IX Report is your institution's Advocate URL/titleix_report (i.e. https://schoolname-advocate.simplicity.com/titleix_report)

System Settings to enable the Title IX Public Report can be found in System Settings>Title IX Reports>Public Reporting>Setting #1: Enable Public Report Module.

The form that will be used as your public report form can be found in "Forms" underneath the "Tools" option in the left hand navigational menu. The form is called "Title IX Report - Public Report Form."

2. The reporter in either case will fill out the report form and will click "Submit" to have the report entered into Title IX for processing.
3. Once a Title IX Report has been entered through the public reporting option, the reviewer will have the option to "Accept & Review" the report or to "Archive" the report. When the option to "Accept & Review" is selected, you can then edit the report to prepare it for processing. The choice to "Archive" the Report will move it into the archives where it will be available in the Archived tab of your Title IX Reports.

Reports that were generated through the Title IX Public Report will have the icon  by the Title IX Report number.

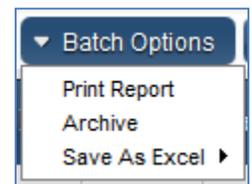
Processing a Title IX Report

To begin work with your Title IX Reports, you can select the “Reports” option under “Title IX Manager” in the left hand navigational menu. You will begin with a view of “All” reports, and can select from the other tabs to view reports based on their status or phase; where they are in your overall workflow. Here is a quick overview of the tabs at the top of the screen:

The screenshot shows the 'Reports' section of the Advocate software. At the top, there are tabs for report status: All, Public, Pending, Complaint Intake, Review Panel, Investigating, Decision, Appeal, Closed, Archived, and Advanced Search. Below the tabs are search filters for Keywords, Assignment, and Search. A 'Batch Options' button is visible above the table. The table lists several reports with columns for Actions, Report # and Students/Student Groups, Reported By, Assigned To, Location of Incident, and Created.

Actions	Report # and Students/Student Groups	Reported By	Assigned To	Location of Incident	Created
<input type="checkbox"/>	T00029-2015 (Pending) Test Student	Jed Bartlet		Biology Lab	July 27, 2015, 2:40 pm
<input type="checkbox"/>	T00028-2015 (Processing) 1 student, 1 student group	Ashley Marie McNamara		Everglades Hall	July 27, 2015, 1:41 pm
<input type="checkbox"/>	T00028-001-2015 (Complaint Intake) Athletics	N/A		Everglades Hall	July 27, 2015, 1:56 pm
<input type="checkbox"/>	T00028-002-2015 (Decision) Perfect Test Student	Ashley Marie McNamara		Everglades Hall	July 27, 2015, 1:56 pm
<input type="checkbox"/>	T00027-2015 (Processing) 1 student	Jed Bartlet		Biology Lab	July 27, 2015, 12:29 pm

- **Public:** The “Public” tab will hold all reports that have come in through the public reporting processes that have not yet been reviewed or archived.
- **Pending:** The “Pending” status tab will show all reports that have entered the Title IX Module through an internal report submission or have been escalated from another reporting module in Advocate that have not yet been processed.
- **Complaint Intake:** One of the phases in Title IX Report processing. This would be used to track progress of your information gathering on the initial report.
- **Review Panel:** One of the phases in Title IX Report processing. This would be used to track progress if your process involves use of a panel or group of reviewers.
- **Investigating:** One of the phases in Title IX Report processing. This would be used to track the progress of your investigation of the report.
- **Decision:** This phase is designed as one of the final phases in Title IX Report processing. It is concluded with a Case Decision where determinations of violation and Resolutions can be entered.
- **Appeal:** This tab shows Title IX reports where an appeal has been entered and a decision is in progress.
- **Closed:** This tab shows Title IX reports that have been closed.
- **Archived:** The ability to move a report to the ‘Archives’ and to change the status to “Archived” can be done at any time in your workflow. The option will be available as a Possible Next Step for any new Public Reports and will be available in the main Title IX Reports menu as a “Batch Option.”



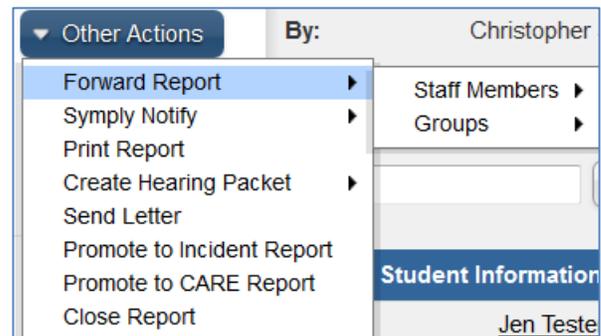
- **Advanced Search:** “Advanced Search” is a searching tool available to search your Title IX Reports through more advanced filters such as Title IX Report flags.

While the various actions that will impact the status of the report can be completed in any order based on your workflow, the report status will reflect the status of the action that applies to the tab that is the furthest to the right within the workflow status options.

Forwarding a Report

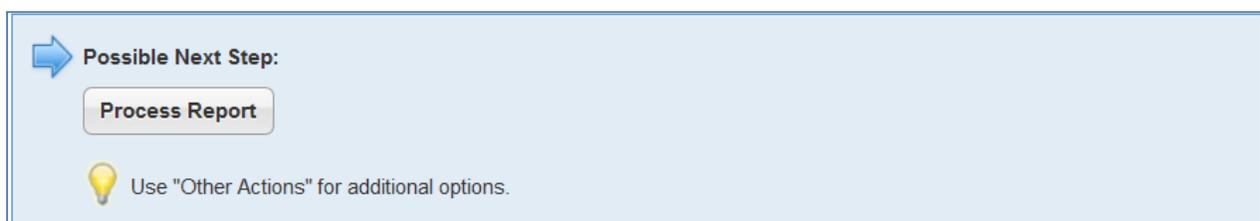
Title IX Manager allows for Title IX Reports to be assigned to multiple individuals, user groups, or a combination of the two throughout processing of the report. A report can also be reassigned at any time during processing. Once a report is forwarded, an email notification will be sent to the assignee, provided the associated system message, the “Title IX Report Forward Notification,” is enabled. To forward a report, you have the following options:

1. Staff and/or Groups can be initially be assigned to cases upon report submission through Rules (Tools>Rules> “New Title IX Report Submitted”).
2. On the Core Information tab for the report, use of the Other Actions>Forward Report>Staff Members/Groups
3. Staff and/or Groups can be assigned to cases upon the report being modified through Rules (Tools>Rules> “Title IX Report Modified”).



Processing Options

To select a report to begin processing, choose the “view” icon (🔍) under the “Actions” column, just to the left of the Title IX Report Number. The report will open, and in addition to reviewing the details of the report you will see some Possible Next Steps that will include “Process Report.” You can also select from options in the “Other Actions” dropdown menu. As you work with your Title IX Report, the Possible Next Step options will update based on actions you have taken.



This will create an individual case for each respondent, whether there are 1, 10, or 100 students, employees, or student groups involved. Each will have a unique case number related to the primary report number. This number is created by assigning a consecutive number to each person or group involved and interjecting this number between the two parts of the parent report. For

instance, T02354-2009 will have T02354-001-2009 and T02354-002-2009 assigned individual case numbers for the two respondents.

Report Phases

Once the child case(s) is created, the status of the report changes to “Pre-Investigation.” Staff may then begin any of the report phases depending on their institution’s process. Phases are different statuses of the report that allow users to monitor the progress of the case and make decisions at each step, recording each decision and allowing the user to determine how the case may or may not proceed. Phases are unique to Title IX cases and provide a great deal of flexibility in processing, documenting, and tracking these reports. Phases allow the institution to track all actions, meetings, decisions for each phase of their process, meeting the need to track everything at each step for OCR compliance.

Possible Next Steps:

- Begin Complaint Intake
- Begin Review Panel
- Begin Investigation
- Begin Decision

Use "Other Actions" for additional options.

Given the flexibility in workflow, it is important to take note of the progress arrows above the Possible Next Steps box. The “green” arrow will show a status or phase that has been completed. The “blue” arrow will show the current status or phase. The “gray” arrow will show a status or phase that has not been used/yet reached.

Pre-Investigation → Complaint Intake → Review Panel → **Investigation** → Decision → Appeal → Closed

✓ Case has been moved to Investigation phase.

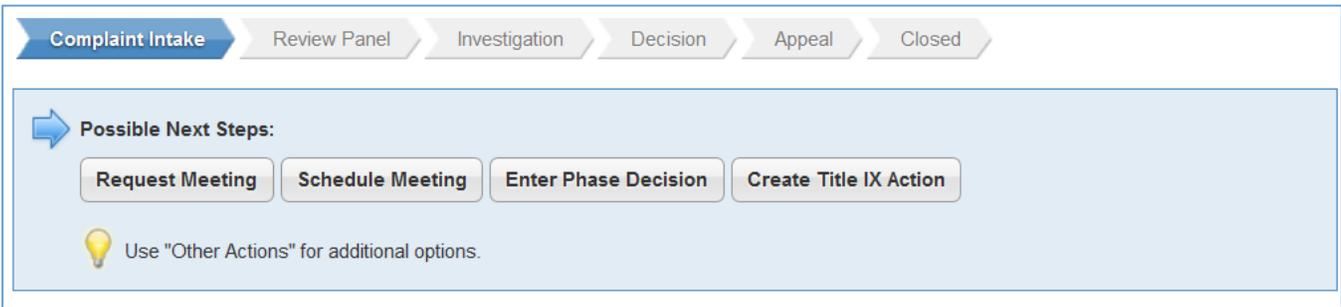
Possible Next Steps:

- Schedule Meeting
- Enter Phase Decision
- Create Title IX Action

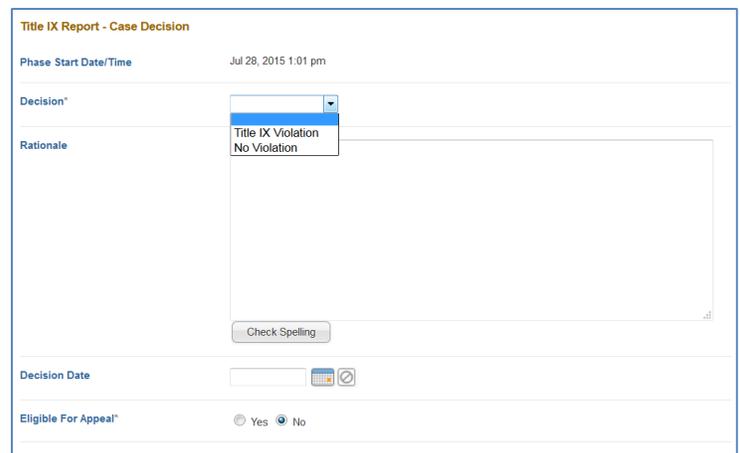
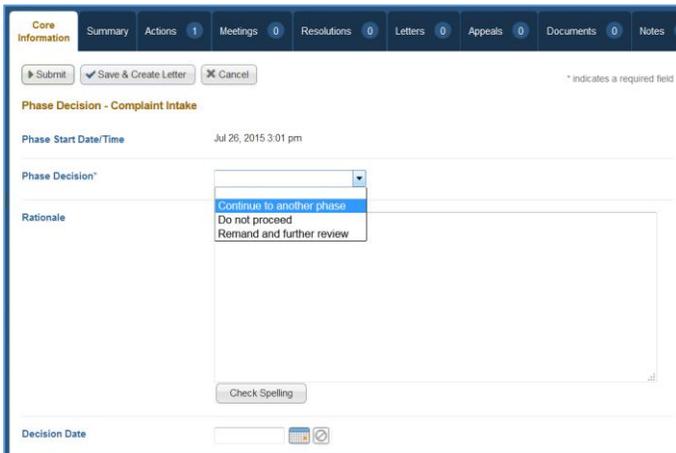
Use "Other Actions" for additional options.

In the example shown above, the case has completed the Pre-Investigation and Review Panel phases, is currently in the Investigation phase, and has not yet done the Complaint Intake, Decision, Appeal, or Closed phases/statuses.

At each phase users will have additional possible next steps, one of which is “Enter Phase Decision.” As the report is processed and users decide when and how the case shall proceed, use of the “Enter Phase Decision” button allows the user to end one phase and move onto another. Each of the phases (Complaint Intake, Investigation, and Review Panel) has their own form that can be edited so that users can provide information about the end of that phase and a choice to move to another.



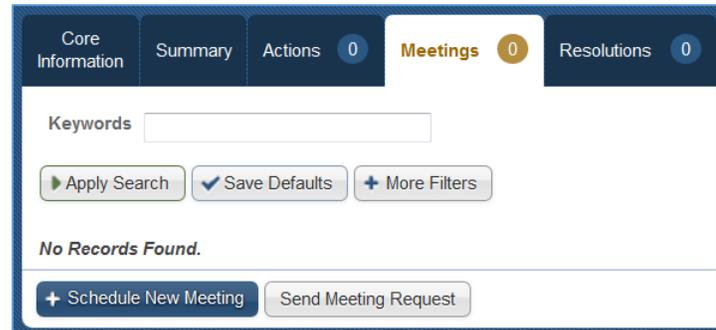
The Investigation and Complaint Intake phases serve for recording actions taken while investigating the Title IX report. The Review Panel phase is meant to serve as the phase for recording actions of panels or hearing boards that are determining Title IX claims. The Decision phase allows users to record the outcome of the case itself and whether or not the case may be appealed.



**Please note that a user can choose any of these phases when processing a case and after making that Phase Decision, choose any other phase. The exception to this is that when you choose “Begin Decision.” Once you choose that phase, you cannot choose any of the other phases and will be making the Case Decision. The report can then continue toward any appeal processes or case closure.*

Meetings

During the various phases of processing the Title IX Report, you have the ability to schedule meetings, as well as request meetings (if you have the “Use ‘Request Meeting’ model” system setting set to “on.” On the Core Information tab, you may see a “Schedule Meeting” or “Request Meeting” button, which will take you to the Meeting form. Additionally, from the Meetings tab, you will see “Schedule New Meeting” and “Send Meeting Request” buttons that can be used to create meetings.



When taken to the Meeting form, you will enter the date/time of the meeting, meeting location, attendees, etc. Note that when scheduling the meeting, you are able to schedule with multiple persons for the same meeting. This is especially helpful when you are attempting to set up a hearing that includes complainants, respondents, witnesses, etc. You are also able to capture data related to advisors that might be attending as well.

Submit
Save & Create Letter
Save
Save As Draft
Cancel
* indicates a required field

Meeting Information

Meeting Type* Review Panel

Attending Student(s)

Respondents

Mary Falcone () (395749)

Complainants

John Norton () (810203)

Attending Staff

[select by group]

Anmol Pradhan
 Anmol magnificent
 Ariana Grande
 Barney Barney
 Bill Nye

1 of 107 selected [show selected] [show all]

Other Attendee(s)

Officer Joe Smith

Conduct Advisor: Name

Bob Jones

Conduct Advisor: Relationship

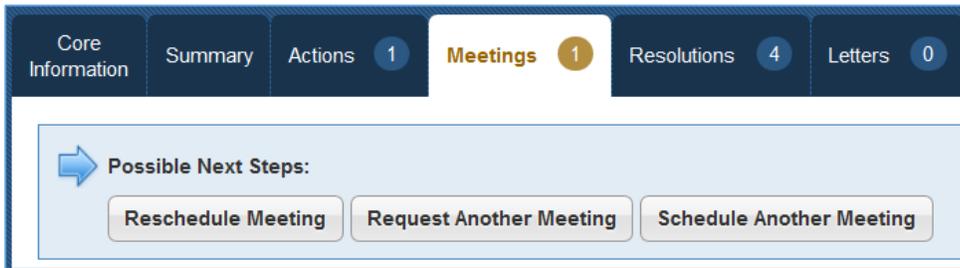
Advisor to Complainant

When a meeting has been created, you can also reschedule it, request another meeting, or schedule another meeting by using the Possible Next Steps box from the meeting itself. Use of the Other Actions dropdown menu can provide meeting scheduling and rescheduling choices as well.

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Last Revised 3/27/13

Confidential | page 7 of 14



Title IX Actions

During each phase of processing the report, users may also add Title IX Actions, which allow you to track your efforts and plan your response to a Title IX Report. Similar to assigning sanctions to a student or employee as the result of an incident report, adding Title IX Actions is a way to identify follow up for the individuals(s) involved (respondents and complainants).

To add actions for follow up, select the “Create Title IX Action” option under Next Possible Steps.

The Title IX Action form will guide you in the collection of the following information:

1. Identify the “Student” or “Employee” with whom you want to associate the Title IX Action. If the report contains multiple individuals, you can identify the person with whom to associate the Action.
2. Enter the “Action Type.” This list is customizable in the Picklist entitled “Title IX Action: Action Type.”
**NOTE: the system has provided a default list of these actions to assist you.*
3. If your Title IX Action has multiple steps, “Checklist Items” can be added to populate the steps associated with the action. You can “Import from Checklist Template” or “Manually Create New Checklist.” Creating Checklist Templates will be reviewed later.
4. “Action Date/Time” allows you to enter a date and time associated with the Action to assist in tracking your response efforts.
5. “Assigned to Staff” allows you to assign to any applicable staff user(s).

Title IX Action

Student
 Abby Student (-) (00001) (Complainant)
 Thomas Tyler (-) (205605160640) (Respondent)

Action Type
 Referral to Counselor

Deadline Date*

Completed*
 Yes No

Action Date/Time

Comments

Action Checklist

Checklist Items

 Choose a checklist template to import: none

Action Status

Action Assignee

6. “Assigned to Group(s)” allows you to any applicable group(s). You may assign and action to multiple staff and/or groups concurrently.
7. If there are additional notes about the Action, it can be entered in the “Comments” section.
8. In the “Action Status”, users are able to identify the status of the action. This list is customizable in the Picklist called “Title IX Action: Action Status.”
9. “Completed” will allow you to note whether or not the action is complete.

When you have finished updating the Action, you have the options to “Submit,” “Save,” and “Save As Draft,” as well as two additional options where you can “Save & Request/Schedule Meeting” or “Save & Create Letter.”

1. When opting to meet with the student or employee through “Save & Request Meeting” or “Save & Schedule Meeting,” you will be taken to a screen to put in the parameters of the meeting. Your System Settings will determine whether or not you will be inputting meeting request parameters or setting an actual meeting time for the individual. You can then choose to “Save” or “Submit” in addition to “Save & Create Letter.”

When requesting a meeting with a person involved, the individual is sent a request with a meeting deadline. Once that person responds and a meeting is established, that meeting can be scheduled in Advocate. By using the Enhanced Meeting Module, the request can result in the individual scheduling the meeting via online availability form, sent via a link embedded in the letter.

If scheduling a meeting with the student or employee, users will formally input a meeting date and time to convey to the individual. In either case, once a meeting has been scheduled, it will sync over to the users’ calendars if using our calendar sync features.

Setting associated with our various meeting features can be found in System Settings>Title IX Reports>Meetings.

2. When choosing to “Save & Create Letter” from the Title IX Action form or through the meeting form, you will then have the option to select a letter template to create a letter to send to the person involved.

You can continue to add Title IX Actions through the same process from the Title IX Report Core tab or in the Title IX Actions tab by selecting the option to “Add New Title IX Action” as needed.

Title IX Action Templates

When adding a Title IX Action to a Title IX Report, the Action may have multiple steps as a part of a particular action based on your campus processes. To add a checklist of steps to your Title IX Action, you can choose between the options to “Import from Checklist Template” or “Manually Create New Checklist.”

To set up a checklist to draw from (import) into an Action, navigate to the menu item “Title IX Actions” and the tab “Title IX Action Checklist Templates.” Select “Add New Checklist Template” to add a checklist. Give the list a name in the “Checklist Name” field and then add “Checklist Items” to populate the list. To add additional items, select “Add Checklist Item” for each new list component. “Submit” or “Save” upon completion. When in your Title IX Action, look for the “Choose a checklist template to import” within the “Checklist Items” field of the Title IX Action to have your template imported into the Action.

When manually adding a checklist, click on the “Manually Create New Checklist” box in the “Checklist Items” section of your Title IX Action. The form will refresh and you are able to manually add checklist items associated with the Title IX Action. To add additional items, select “Add Checklist Item” for each new list component.

Title IX Actions List

The Title IX Actions list is a workload tool that allows you to track the current status of all follow up particular students or all active cases. By assigning a Title IX Action to specific users and/or groups, you are able to take advantage of System Messages to automatically notify assigned users and groups of the Title IX Action being added and assigned as well as give users the ability track actions that are assigned to them in the “Title IX Actions” menu. Using the filter form, Title IX Actions can be filtered by assignee, student, action type, completion status, etc.

Actions	Report #	Student(s)/Student Group(s)	Action Type	Action Date/Time	Completed	Assigned To	Last Modified	Draft
<input type="checkbox"/>	T00001-001-2015	Perfect Test Student	Referral for No Contact Order	Jul 15, 2015 8:00 am	No		July 15, 2015, 10:03 am	No
<input type="checkbox"/>	T00004-001-2015	Perfect Test Student	Contact with Respondent	Jul 17, 2015 10:00 am	No		July 15, 2015, 11:02 am	No
<input type="checkbox"/>	T00004-001-2015	Perfect Test Student	Referral for No Contact Order	Jul 15, 2015 8:00 am	Yes		July 15, 2015, 11:02 am	No

Resolving Title IX Actions

Title IX Actions associated with a Title IX Report can be marked as complete in several ways:

- They can be marked as complete when entered into the Advocate if no action is required or if the action has already taken place;
- An individual Title IX Action can be marked complete with the Title IX Actions tab of a Title IX Report by choosing to view the Title IX Action and selecting the button to “Mark As Complete”;
- You can mark several Title IX Actions in a single report as complete from the list on the Title IX Actions tab by marking the boxes next to several Title IX Actions and choosing “Mark as Complete” from “Batch Options”; and by Selecting Title IX Actions from the left navigational menu will open up a list of all Title IX Actions. You can once again use the Batch Option > Mark as Complete (as referenced above) to complete Title IX Actions from multiple reports.

Resolutions

After entering the case result for the “Decision” phase, users can choose to add Resolutions. Resolutions are similar to Sanctions in the Incident Report process and can serve as outcomes for a Title IX violation. Resolutions can be added to either the Complainant or Respondent in the case to track all outcomes for each student involved in the case.

Similar to Title IX Actions, a list of Resolutions can also be seen on the left navigation menu under Title IX Manager>Resolutions.

Appeals

When a Title IX Report’s decision is marked as “Eligible for Appeal,” the appeal process can be applied to the case. Advocate allows staff to manually enter an appeal into the system or the student(s) involved can submit their own appeal via an appeal link provided in their decision letter. The appeal link(s) can be generated through the “Send Letter” other action and using a “Title IX Report Decision” letter template with the appeal link merge field [appeal_link] allowing you to notify complainant(s) and the respondent of the case outcomes at the same time. An appeal can be entered by both the respondent and the complainant(s) for the same Title IX report, and decisions can be made on each individually.

Resetting the Appeal Timeline

Once the original decision letter is sent with an appeal link, the appeal window identified in the settings begins counting down the number of days until the appeal link will become inactive. Students or Employees following the appeal link after the number of days identified in the window will receive an error message indicating that the appeal can no longer be submitted and will not be given a form to enter their appeal. If an appeal timeline needs to be reset because of administrative necessity, in order to enable appeal entry by the student/employee past the appeal window, staff must do the following:

1. Because the appeal link will only work at the decision phase of the case, if the case is still in the status of Pending Resolution, the staff member may edit and resend the decision letter, making any applicable amendments prior to sending the letter.
2. The original decision letter must then be deleted, otherwise the appeal window from this original decision letter will continue to be honored. To delete the letter, view the send letter and select the Delete button.
3. Alternatively, or if the above criteria are not met, the staff member may enter the appeal on behalf of the individual via the Student/Employee Appeal button.

Editing Submitted Appeals

Users can edit appeals that have been entered in to the system by clicking on the appeals tab at the top of an Title IX report, then on the view or edit icon next to the appeal that they would like to view/modify. Users can edit the appeal forms so that fields appear only on the internal appeal forms (for example: appeal accepted/denied, appeal hearing scheduled, appeal officer, etc). In this way you can track

additional information about the appeal process.

Core Information							
Summary	1	Meetings	0	Sanctions	0	Letters	4
Appeals	2	Documents	0	Notes	0		
Batch Options Items 1-2 of 2 Showing 20							
Actions	Appeal #	Appeal Type	Appealed On	Appeal Decision On	Appeal Decision Outcome		
	1	DOS	December 4, 2011	December 4, 2011	Appeal Decision Overturned		
	2	Victim	December 4, 2011	December 4, 2011	Appeal Decision Sustained		
Items 1-2 of 2 Showing 20							

Entering an Appeal Decision

Once an appeal is submitted and any additional information has been added to it, you can use the workflow buttons to enter your decision. The workflow buttons appear on the Core Tab, as with other workflow buttons, but they also appear when you are viewing an appeal in the system. You can edit the language of the appeal options under System Settings > Localizations.

You can edit the Administrative Action: Appeal Decision Modified and Administrative Action: Appeal Decision Upheld / Overturned subforms in order to properly collect the information you need about appealed cases.

The original decision information will be retained for each appeal so users may delete responsible findings and sanctions that have been modified or overturned.

Users may mark their appeal decision as appealable and a student/employee or victim may appeal the case again (if appropriate). The type must be different from the previously submitted appeal for a respondent and complainant(s) to be able to appeal an incident that has already been appealed.

Removing Appeal Decisions and/or Appeals

Deleting Appeals or Appeal Decisions works chronologically backwards in your system starting with the most recent action and going one step at a time. For example, if there are two appeals associated with a Title IX report with decisions on both, you must start by deleting the most recent decision on Appeal #2, then delete Appeal #2 (the student/employee's appeal information), before being able to edit/delete Appeal #1's Decision or Appeal #1 itself. The delete action will first delete the appeal decision only and repeating the action would delete the appeal itself. The steps below outline how to edit delete the most recent decision or appeal.

To delete an appeal decision, first click on the appeal tab of the Title IX report. Choose the most recent appeal, if there is more than one, by clicking the edit () icon associated with it. At the top of the appeal decision edit screen you will see a Delete Button appear. Click "Delete" and a pop up will confirm that you would like to delete the appeal decision. The Appeal itself will remain, and the case will return to the Appeal Decision stage in the workflow where you can re-enter the decision with the changes that are needed.

To delete an appeal completely, it needs to be the most recent appeal and you will have to clear any decisions on that appeal per the steps above first. Once the decision is deleted, click the edit icon associated with the appeal and again the delete button will show at the top of the screen. A pop-up will display confirming that you would like to purge the appeal. Clicking yes will remove the appeal completely from the case file and your system.

CARE Report Lifecycle

The CARE Network of Advocate provides unique workflow options to help track and respond to student behavioral concerns and academic performance issues that may fall outside of the student conduct process. This guide will provide a basic overview workflow options including CARE Actions and CARE Action Plans and will highlight system settings to help configure the system to meet your campus needs.

Collecting CARE Reports

CARE Reports can be created through 3 different methods:

- CARE Reports can be entered by a user who is logged in to Advocate;
- Security Reports and Incident Reports can be escalated to create CARE Reports; and
- CARE Reports can be collected through a public reporting process.

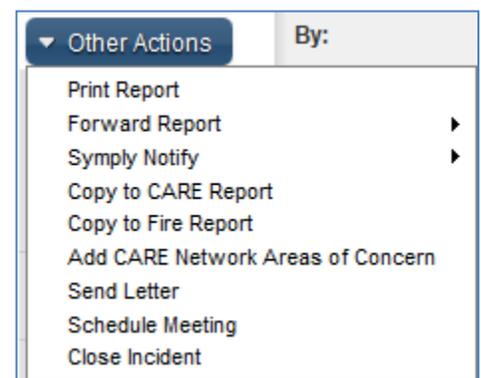
Internally Created Reports

1. To create a report as a user who is logged in to Advocate, through the Home Page you can select the red “Create CARE Report” button on the home page.
2. Complete the form and click on:
 - a. “Submit” to take you to the list of CARE Reports.
 - b. “Save” to take you to a read-only version of the new CARE Report to begin processing.



Escalated Reports

1. To create a CARE Report from an Incident Report or a Security Report, you can select the option to “Copy to CARE Report” from the “Other Actions” and “Actions” menus in each type of record respectively.
2. When escalating a report from either area, there are some System Settings that you can put into place to help map the information in the fields of the originating report into the fields held within your CARE Report form in addition to any other report editing you feel is appropriate.



Settings associated with this process can be found in:

- System Settings>CARE Network>Escalation>Setting #2: Incident: Copy to CARE Report Map;
- System Settings>CARE Network>Escalation>Setting #3: Include Notes and Documents; and
- System Settings>System Modules>Security Report>Setting #8: Security Report Escalation to CARE Map.

Note: Please see the “CARE/IR Escalation” document for further details.

3. Complete the form and click on:
 - a. “Submit” to take you to the list of CARE Reports.
 - b. “Save” to take you to a read-only version of the new CARE Report to begin processing.

Reports that have been escalated will have the escalated (📄) icon with the CARE Report number.

Public CARE Reports

1. Your Advocate system supports the collection of public reports through a public facing webpage or through the student interface if either is enabled on your campus.
 - a. The address for your institution’s public CARE Report is your institution’s Advocate URL/care_report (i.e. https://demouniversity-advocate.simplicity.com/care_report)
 - b. When students use the student interface to enter a public report, the student will log in to a student portal in Advocate and there will be an option to “Report A Student of Concern”.



System Settings to enable the CARE Public Report can be found in System Settings>CARE Network>General>Setting #2: Public CARE Reports.

The Student Interface can be enabled in System Settings>Students>Student Interface>Setting #1: Enable Student Interface & System Settings>Students>Student Interface>Setting #2: Disable Student Interface Login.

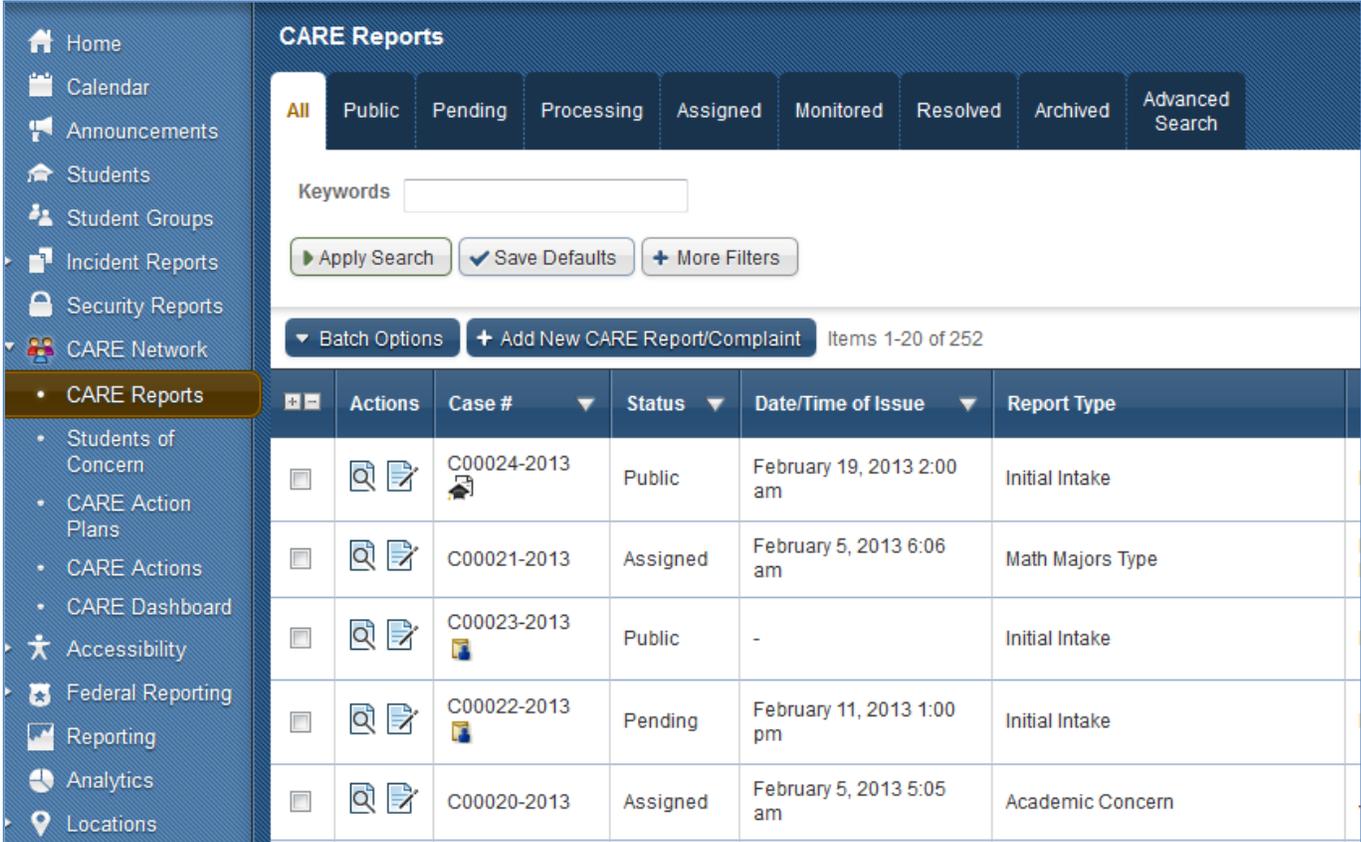
The forms that will be used as your public report forms can be found in “Forms” underneath the “Tools” option in your left hand navigational menu. They are called “CARE Network Report – Public Report Form” and “Student Interface CARE Report Form”.

2. The reporter in either case will fill out the report form and will click “Submit” to have the report entered into CARE for processing.
3. Once a CARE Report has been entered through one of the public reporting option, the reviewer will have the option to “Accept & Review” the report or to “Archive” the report.

When the option to “Accept & Review” is selected, you can then edit the document to prepare it for processing. The choice to “Archive” the Report will move it into the archives where it will be available in the Archived tab of your CARE Reports.

Reports that were generated through the CARE Public Report will have the icon  by the CARE Report number, while those coming from the Student interface will show the icon .

Processing a CARE Report



The screenshot shows the 'CARE Reports' interface. On the left is a navigation menu with options like Home, Calendar, Announcements, Students, Student Groups, Incident Reports, Security Reports, and CARE Network. The 'CARE Reports' option is selected. The main area has tabs for 'All', 'Public', 'Pending', 'Processing', 'Assigned', 'Monitored', 'Resolved', and 'Archived'. Below the tabs is a search bar with 'Keywords' and buttons for 'Apply Search', 'Save Defaults', and 'More Filters'. A 'Batch Options' button and '+ Add New CARE Report/Complaint' link are also visible. A table displays a list of reports with columns for Actions, Case #, Status, Date/Time of Issue, and Report Type.

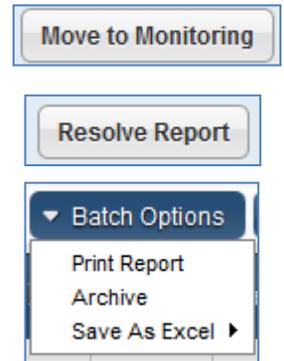
Actions	Case #	Status	Date/Time of Issue	Report Type
	C00024-2013	Public	February 19, 2013 2:00 am	Initial Intake
	C00021-2013	Assigned	February 5, 2013 6:06 am	Math Majors Type
	C00023-2013	Public	-	Initial Intake
	C00022-2013	Pending	February 11, 2013 1:00 pm	Initial Intake
	C00020-2013	Assigned	February 5, 2013 5:05 am	Academic Concern

To begin work with your CARE Reports, you can select the “CARE Reports” option under “CARE Network” in your left hand navigational menu. You will begin with a view of “All” reports, and can select from the other tabs to view reports based on their status; where they are in your overall workflow. Here is a quick overview of the status tabs at the top of the screen:

- **Public:** The “Public” tab will hold all reports that have come in through the public reporting processes that have not yet been reviewed or archived.
- **Pending:** The “Pending” status tab will show all reports that have entered the CARE Network through an internal report submission or have been escalated from another

reporting module in Advocate that do not yet have Areas of Concern attached as a part of the reporting process.

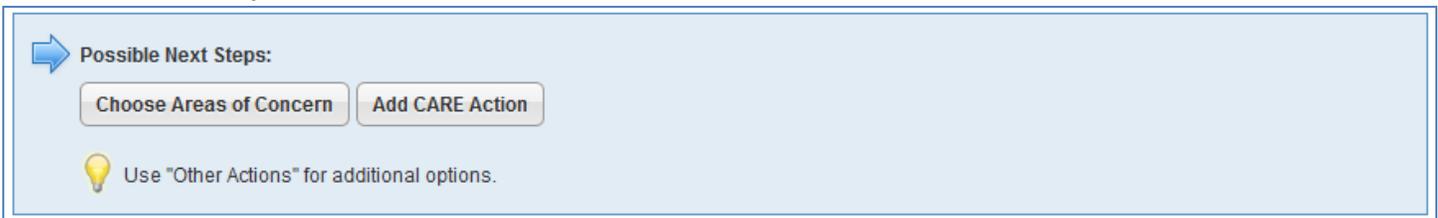
- **Processing:** Reports will move to the status of “Processing” when Areas of Concern or a CARE Action are added to them.
- **Assigned:** CARE Reports that have been assigned to user(s) and/or group(s) as a part of report processing will be moved to the status of “Assigned”.
- **Monitored:** Reports will move to a status of “Monitored” when a user chooses the Possible Next Step to “Move to Monitoring” or selects this option from the “Other Actions” menu. This can be selected at any time.
- **Resolved:** The status of “Resolved” is applied to a CARE Report when a user chooses to “Resolve Report” as a Possible Next Step or as one of the “Other Actions”. This can be selected at any time.
- **Archived:** The ability to move a report to the archives and to change the status to “Archived” can be done at any time in your workflow. The option will be available as a Possible Next Step for any new Public Reports and will be available in the main CARE Reports menu as a “Batch Option”.
- **Advanced Search:** “Advanced Search” is not a CARE Report status, but it is a searching tool available to search your CARE Reports through more advanced filters



While the various actions that will impact the status of the report can be completed in any order based on your workflow, the report status will reflect the status of the action that applies to the tab that is the furthest to the right within the workflow status options.

Processing Options

To select a report to begin processing, choose the “view” icon (🔍) under the “Actions” column, just to the left of the CARE Report Number. The report will open, and in addition to reviewing the details of the report you will see some Possible Next Steps that will include “Choose Areas of Concern” and “Add CARE Actions”. You can also select from options in the “Other Actions” dropdown menu. As you work with your CARE Report, the Possible Next Step options will update based on actions you have taken.



Areas of Concern

To add Areas of Concern, take the following steps:

1. Select the “Choose Areas of Concern” option under Next Possible Steps.

2. Identify the Concern Type and the Concern Severity associated with that Concern Type. If there is more than one concern type, you are able to use the “Add Areas of Concern” button to reflect additional concerns and severity levels associated with the specific CARE Report.
3. Select “Save” to return to a viewable version of the CARE Report.
OR
Select “Submit” to return to the list of CARE Reports.
4. Once you add Areas of Concern, you can view and update those areas through the “Edit Areas of Concern” link on the right side of the screen in the section called “Areas of Concern.”

Areas of Concern

Concern Type*

Choose any areas of concern this report involves.

Concern Severity*

Assess the severity of the report, with High being the most severe and requiring the most attention.

High Medium Low

Concern Type*

Choose any areas of concern this report involves.

Concern Severity*

Assess the severity of the report, with High being the most severe and requiring the most attention.

High Medium Low

The picklist associated with your Areas of Concern list can be found in Tools>Picklists and is the picklist entitled “CARE Network: Concern Types”.

When you add Areas of Concern to a CARE Report, you engage the following features:

- Adding Areas of Concern will feed this information into the “CARE Dashboard”;
- The Areas of Concern and Concern Severity Matrix will help generate a SympScore for the student that will interact with the “Students of Concern” list;
- CARE Action Plans will be available as a possible option for tracking your work with this student, if you have CARE Action Plan enabled;
- “Assign Report” will now appear as one of the Possible Next Steps.

By adding Areas of Concern, the report will move to a status of “Processing”.

CARE Actions

Assigning CARE Actions to a CARE Report allows you to track your efforts and plan your response to a CARE Report. Much like assigning sanctions to a student as the result of an incident report, adding CARE Actions is a way to identify follow up for the student(s) involved.

CARE Action

Student Debra Jean (Bartlett Hall - 161) (0515)

Action Type Resource Referral

Checklist Items

Choose a checklist template to import: Resource Referral

1. Referral information given to student
2. Referred department notified
3. Confirmation of completion received

Action Date/Time 2013-03-12 02:00 pm

Assigned To Staff

Assigned To Group(s) CARE

- CARE Team

Comments

Action Status Awaiting Update (from staff)

Completed* Yes No

To add actions for follow up, select the “Add CARE Action” option under Next Possible Steps. The CARE Action form will guide you in the collection of the following information:

1. Identify the “Student” you want to associate the CARE Action with. If the report contains multiple students, you can identify the student with whom to associate the Action.

2. Enter the “Action Type”. This list is customizable in the Picklist entitled “CARE Report Followup Action: Action Taken”.
3. If your CARE Action has multiple steps, you can add “Checklist Items” to populate the steps associated with the action. You can “Import from Checklist Template” or “Manually Create New Checklist”. Creating Checklist Templates will be reviewed later.
4. “Action Date/Time” allows you to enter a date and time associated with the Action to assist in tracking your response efforts.
5. “Assigned to Staff” allows you to assign to any applicable staff user(s).
6. “Assigned to Group(s)” allows you to any applicable group(s). You may assign and action to multiple staff and/or groups concurrently.
7. If there are additional notes about the Action, it can be entered in the “Comments” section.
8. In the “Action Status”, users are able to identify the status of the action. This list is customizable in the Picklist called “CARE Report Followup Action: Action Status”.
9. “Completed” will allow you to note whether or not the action is complete.

When you have finished updating the Action, you have the options to “Submit” and “Save” as well as two additional options where you can “Save & Request/Schedule Meeting” or “Save & Create Letter”.

1. When opting to meet with the student through “Save & Request Meeting” or “Save & Schedule Meeting”, you will be taken to a screen to put in the parameters of the meeting. Your System Settings will determine whether or not you will be inputting meeting request parameters or setting an actual meeting time for the student. You can then choose to “Save” or “Submit” in addition to “Save & Create Letter”.

When requesting a meeting with a student, the student is sent a request with a meeting deadline. Once the student responds and a meeting is established, that meeting can be scheduled in Advocate. By using the Enhanced Meeting Module, the request can result in the student scheduling the meeting via the student interface or the online availability form, sent via a link embedded in the letter.

	00249-001-2012	
	00299-002-2012	

[Request New Meeting](#) Items 1-20 of 31

How to use this section:

- 1) Select search criteria from the filters on the left most menu.
- 2) Dates in blue on the center calendar have available times. Click a date to view a list of times.
- 3) Select a time from the popup box. Details about your selection will appear on the right most section. When you are ready, click "Submit Request" to finalize your request.

1. SET YOUR SCHEDULING CRITERIA

Incident Report
#0020-002-2012

Hearing Officer(s)
 Felicity Google

Earliest Time
[Dropdown] [Dropdown] [Dropdown] [Clear]

Latest Time
[Dropdown] [Dropdown] [Dropdown] [Clear]

2. CLICK A DATE AND TIME

June 2012

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

3. SUBMIT YOUR REQUEST

* indicates a required field

Date*
Time*

Additional Information

[Cancel] [Submit Request]

If scheduling a meeting with the student, users will formally input a meeting date and time to convey to the student. In either case, once a meeting has been scheduled, it will sync over to the users' calendars if using our calendar sync features.

Setting associated with our various meeting features can be found in System Settings>CARE Network>Meetings.

2. When choosing to "Save & Create Letter" from the CARE Action form or through the meeting form, you will then have the option to select a letter template to create a letter to send to the student.

You can continue to add CARE Actions through the same process from the CARE Report Core tab or in the CARE Actions tab by selecting the option to "Add New CARE Action" as needed.

Adding a CARE Action to a CARE Report will update the status of the CARE Report to "Processing" and will also enable the CARE Action Plan option.

Action Templates

When adding a CARE Action to a CARE Report, the Action may have multiple steps as a part of a particular action based on your campus processes. To add a checklist of steps to your CARE Action, you can choose between the options to "Import from Checklist Template" or "Manually Create New Checklist".

To set up a checklist to draw from (import) into an Action, navigate to the menu item "CARE Actions" and the tab "CARE Action Checklist Templates". Select "Add New Checklist Template" to add a checklist. Give the list a name in the "Checklist Name" field and then add "Checklist Items" to populate the list. To add additional items, select "Add Checklist Item" for each new list component. "Submit" or "Save" upon completion. When in your CARE Action, look for the "Choose a checklist template to import" within the "Checklist Items" field of the CARE Action to have your template imported into the Action.

When manually adding a checklist, click on the "Manually Create New Checklist" box in the "Checklist Items" section of your CARE

Action. The form will refresh and you are able to manually add checklist items associated with the CARE Action. To add additional items, select “Add Checklist Item” for each new list component.

CARE Actions List

The CARE Actions list is a workload tool that allows you to track the current status of all follow up particular students or all active cases. By assigning a CARE Action to specific users and/or groups, you are able to take advantage of System Messages to automatically notify assigned users and groups of the CARE Action being added and assigned as well as give users the ability track actions that are assigned to them in the “CARE Actions” menu. Using the filter form, CARE Actions can be filtered by assignee, student, action type, completion status, etc.

The screenshot shows a web interface for filtering CARE Actions. At the top, there are two tabs: "CARE Actions" (selected) and "CARE Action Checklist Templates". Below the tabs is a "Keywords" search box. The main area is divided into two columns. The left column contains: "Student" with a search box and a list area; "Action Type" with a dropdown menu; "Action Date/Time" with two date pickers and a "to" separator; and "Completed" with radio buttons for "Yes" and "No". The right column contains: "Draft" with radio buttons for "Yes" and "No"; "Assigned To Staff" with a search box and a list area; "Assigned To Group(s)" with a search box and a list area; and "Action Status" with a dropdown menu. At the bottom left, there are three buttons: "Apply Search", "Save Defaults", and "Fewer Filters".

Resolving CARE Actions

CARE Actions associated with a CARE Report can be marked as complete in several ways:

- They can be marked as complete when entered into the Advocate if no action is required or if the action has already taken place;
- An individual CARE Action can be marked complete with the CARE Actions tab of a CARE Report by choosing to view the CARE Action and selecting the button to “Mark As Complete”;
- You can mark several CARE Actions in a single report as complete from the list on the CARE Actions tab by marking the boxes next to several CARE Actions and choosing “Mark as Complete” from “Batch Options”; and by
- Selecting CARE Actions from the left navigational menu will open up a list of all CARE Actions. You can once again use the Batch Option > Mark as Complete (as referenced above) to complete CARE Actions from multiple reports.

CARE Action Plans

Action Plans can be utilized for a more student-centered follow up approach (as opposed to report-centered) which looks at the accumulative history of a student in the CARE Network when assigning CARE Actions. To associate a report with a CARE Action Plan, select “Add CARE Action Plan” from “Possible Next Steps”. You can choose to create a “New CARE Action Plan” or “Relate to” an already existing plan within CARE if one already exists. By relating to a current plan, reports can be joined together in a single plan to process and track together. A student can have multiple associated Action Plans.

To make CARE Action Plans available in your Advocate site, you can find the setting in System Setting>CARE Network>General>Setting #15: Enable CARE Action Plans. If this setting is disabled on your campus, you can skip this workflow option and move ahead to the “Assigning a Report” section on page 15.

To add to an already existing plan, select “Add CARE Action Plan” from the Possible Next Steps and choose the option to “Relate to” the plan you wish to associate the report with. To create a new CARE Action Plan, select “Add CARE Action Plan” from Possible Next Steps and select “New CARE Action Plan”. The CARE Action Plan form will assist you in setting up your plan.



The CARE Action Plan form will ask for the following information to assist with set up:

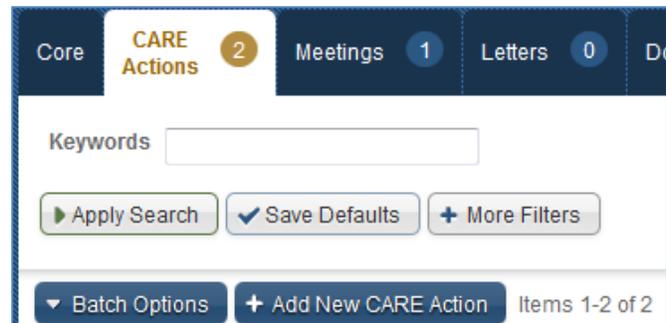
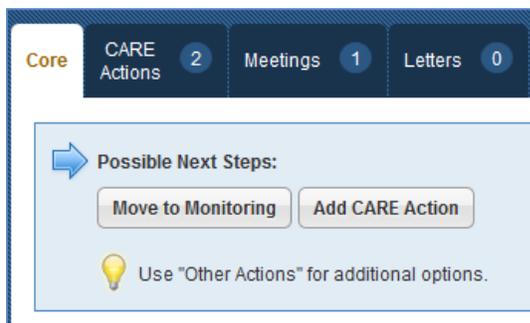
1. The “Label” field is where you can provide a name or title to the Action Plan.
2. The “Student” field will confirm the name of the student.
3. “CARE Team” allows you to associate the overall plan with a team based on your User Groups to assist in filtering and tracking the overall plan.
4. The “Plan Summary” field allows your team to input information about the plan that can include overall goals, plan needs, etc.

5. An “Action Template” can be set up for your plan to implement standard campus protocols to an Action Plan. Setting these up will be explored in the next section.
6. The “Concern Type” list will populate from the Areas of Concern existing in your Advocate system. Any Areas of Concern you have already added to the initiating CARE Report will show in the new Action Plan.
7. The “Action Status” will reflect if the plan is Active or Resolved. All new plans will start with the status of “Active”.

By choosing the option of a CARE Action Plan, your follow up shifts away from the originating report(s) and moves to the Action Plan itself.

When adding CARE Actions to populate your new plan or to supplement an existing plan, you have the following options:

1. From the “Core” tab of the Action Plan, you can choose to “Add CARE Action” from the “Other Actions” dropdown menu or from the CARE Actions tab in the CARE Action Report, you can choose to “Add New CARE Action”. When you add the new Action, you can choose to associate with a Related CARE Report



CareNetwork Followup Action

Related CARE Report

- A CARE Action can be added to the Action Plan through the “Core” tab of the originating Report as a Possible Next Step or from the “CARE Actions” tab by selecting the option to “Add New CARE Action”. When adding the CARE Action through either option, the CARE Action form will give you the option to associate the Action with a Related CARE Action Plan.

Related CARE Action Plan



CARE Action Plan Templates

When you select the option to use an “Action Template” when setting up a new CARE Action Plan, you can easily populate your Action Plan with a CARE Action Plan Template that is comprised of CARE Actions and any associated Action Checklist Templates. If there are a series of standard actions you might take as a part of an Action Plan on your campus, you can use Action Plan Templates to help you set up an Action Plan that highlights campus specific protocols and allows to the addition of other student specific follow up.

Once an Action Plan Template is added, the CARE Actions that are a part of that template will appear as a checklist of Actions within your Action Plan.

Action Template

- Campus Notification (Awaiting Update (from staff)) with 4 checklist items

Concern Type Choose any areas of concern this action plan involves.

Academic Concern

CARE Action Plan	
Action Plan Number	CAP00009-2013
Student	Patrick Guenther
Plan Checklist	<input type="checkbox"/> Campus Notification (Status: Awaiting Update (from staff)) <ol style="list-style-type: none"> <input type="checkbox"/> Notify Faculty of Absence <input type="checkbox"/> Notify Registrar of Absence <input type="checkbox"/> Send Student Academic Resource Information <input type="checkbox"/> Hall Director outreach upon return (if a residence hall student)
Concern Type	Academic Concern, Substance Use/Abuse
Action Status	Active

To create CARE Action Plan Templates for use with your CARE Action Plan, you can set up templates under the “CARE Action Plan Templates” tab in the “CARE Action Plans” menu. Select “Add New CARE Action Plan Template” to begin working on your template. Provide a name to help identify the template and then choose the option to “Save And Add Actions...” to populate the template with Actions. As you add Actions you have the choice to Import from Checklist Template or Manually Create New Checklist to supplement the Action.



[new record] Search

CARE Actions CARE Action Checklist Templates

▶ Submit ✓ Save ✕ Cancel

Checklist Template

Checklist Name

Checklist Items

Checklist Item #1

Notify student of Counseling Resources

🔥 Remove Checklist Item

Checklist Item #2

Remove Checklist Item

+ Add Checklist Item

▶ Submit ✓ Save ✕ Cancel

Resolving CARE Actions associated with CARE Action Plans

To complete CARE Actions that are associated with CARE Action Plans, the same options referenced in the earlier section on Resolving CARE Actions will apply. Actions marked as complete through one of those options will also complete the Actions in the CARE Action Plan. Additional options include:

- CARE Actions can be marked as complete on the Core page of the CARE Action Plan by checking the boxes next to the completed items;
- Within the CARE Actions tab of the CARE Action Plan, individual items can be marked as complete by viewing a CARE Action and selecting the “Mark As Complete” button;

- Multiple Actions can be completed through “Batch Options” in the CARE Actions tab of the CARE Action Plan by selecting the boxes next to various Actions and choosing “Mark as Complete”.

Assigning a Report

The CARE Network allows for CARE Reports to be assigned to multiple individuals, user groups, or a combination of the two throughout processing of the report. A report can also be reassigned at any time during processing. Once a report is Assigned, an email notification will be sent to the assignee, provided the associated system message, the “CARE Report Assigned Notification,” is enabled. To assign a report, you have the following options:

1. Once a CARE Action or an Area of Concern has been added to the report, one of the Possible Next Steps will be to “Assign Report”. Select this option to add assignees.
2. In the inset form that will appear, you can add Staff, Groups, or a mix of both as assignees for this particular report.
3. “Submit” your selections to add the staff and group(s) as assignees.

Staff and/or Groups can be initially be assigned to cases upon report submission through the following System Settings:

- System Settings>CARE Network>Report Routing>Setting #1: Enable Automation CARE Report Routing;
- System Settings>CARE Network>Report Routing>Setting #2 CARE Report Initial Staff Assignment; and
- System Settings>CARE Network>Report Routing>Setting #3: CARE Report Initial Group Assignment.

At any point in your workflow, you can Edit Assignees through the menu on the right side of the screen in the section called Assigned To by selecting “Edit Assignees”. A window will open to update the assigned staff and assigned groups.

Adding assignees will change the status of your CARE Report to “Assigned”.

Areas of Concern	
Concern Type	Severity
Mental Health	Medium
Edit Areas of Concern	
Assigned To	
Staff	
<ul style="list-style-type: none"> • Alicia Dimond 	
Groups	
<ul style="list-style-type: none"> • CARE Team (Show Members) 	
Edit Assignees	
Student Information	

Edit Report Assignees

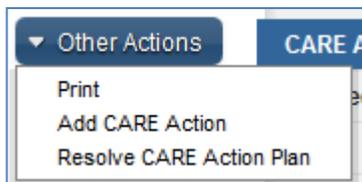
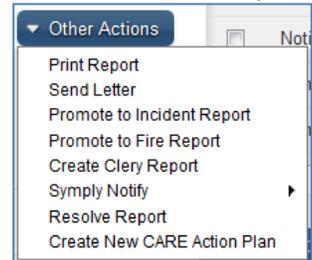
Assigned To Staff:

Assigned To Group(s):

Resolving CARE Reports and CARE Action Plans

A CARE Report can be resolved at any time during the workflow, when not related to a CARE Action Plans. Resolving a Report will not complete all associated Actions, so there is the ability to continue to track those items. All Resolved reports will show in the “Resolved” tab in your CARE Reports menu.

When a CARE Report is associated with a CARE Action Plan, you will not be able to resolve an associated report until such time as the Action Plan itself is Resolved. When you mark the Action Plan as Resolved, all associated Reports will also be Resolved.



CARE Report tabs and their meanings:

NOTE: *If you do not utilize the CARE Action Plan and have disabled it in “Preferences > CARE Network > General > #12 - Enable CARE Action Plans”, you would have all tabs except the “Assigned” tab.*

ALL: This tab lists all the CARE Reports in the system except archived CARE Reports.

Public: This is the tab where all Public CARE Reports are housed.

Pending: Houses all CARE Reports that have not been assigned an Area of Concern.

Processing: All CARE Reports that have been assigned Areas of Concern are placed in this tab.

Assigned: This tab houses all CARE Reports that have been assigned a CARE Action Plan.

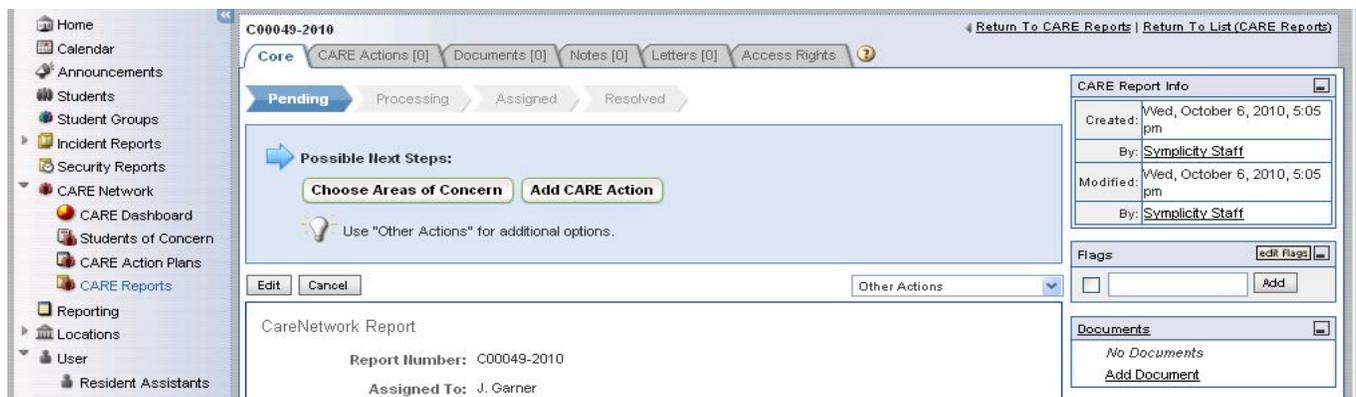
Monitored: All CARE Reports marked “Monitored” are kept in this tab.

Resolved: Keeps all CARE Reports where the CARE Action Plan(s) are marked completed.



CARE Report Statuses and their meanings:

Pending CARE Reports: These are CARE Reports with no Areas of Concern.



Processing CARE Reports: CARE Reports are in “Processing” mode if Areas of Concern have been added but CARE Action Plans have not yet been created.

The screenshot shows the Symplicity interface for a CARE Report with ID C00048-2010. The report is in the 'Processing' stage, indicated by a blue arrow in the progress bar. A green arrow points to the 'Area of Concern' section, which contains the following information:

- Report Number: C00048-2010
- Assigned To: David Johnson
- Report Type(s): Medical Concern
- Date/Time of Incident: Sep 03, 2010 3:00 pm
- Location: Reed Hall
- Room: 50
- Students Involved: Song, Stephen (1000457); Harriman, Janet (27161678)
- Description: jdfahsdfdsfkllasdfjasdlkfjaskldkfajkdffa
- Risk Assessment:
 - Concern Type: Mental Health
 - Concern Severity: Level 3

Other details visible in the interface include:

- Buttons: Edit, Cancel, Other Actions
- Right-hand panels: CARE Report Info (Created: Wed, October 6, 2010, 5:03 pm; By: Symplicity Staff), Flags, Documents (No Documents, Add Document), Notes (No Notes, Add Note).
- Left-hand navigation menu: Home, Calendar, Announcements, Students, Student Groups, Incident Reports, Security Reports, CARE Network, CARE Dashboard, Students of Concern, CARE Action Plans, CARE Reports, Reporting, Locations, User, Resident Assistants, Supervisors, Staff Members, Tools, Letter Templates/Email, Contacts, Groups/Roles, Forms, Digest Templates, Picklists, Help.

Assigned CARE Reports: This is the status of CARE Reports when CARE Action Plans have been created.

The screenshot shows the Symplicity interface for a CARE Report with ID C00047-2010. The report is in the 'Assigned' stage, indicated by a blue arrow in the progress bar. A green arrow points to the 'CARE Action Plan' section, which contains the following information:

- Report Number: C00047-2010
- Assigned To: Barney Barney
- Report Type(s): Academic Issues
- Date/Time of Incident: Oct 02, 2010 2:00 pm
- Location: Hull House A
- Room: 100
- Students Involved: Bowers, Timothy (1000382)

Other details visible in the interface include:

- Buttons: Edit, Cancel
- Yellow warning box: **This CARE Report is assigned to active CARE Action Plan CAP00031-2010 for Timothy Bowers.** Please resolve CAP00031-2010 to resolve this CARE Report.
- Left-hand navigation menu: Home, Calendar, Announcements, Students, Student Groups, Incident Reports, Security Reports, CARE Network, CARE Dashboard, Students of Concern, CARE Action Plans, CARE Reports, Reporting, Locations, User, Resident Assistants, Supervisors, Staff Members, Tools, Letter.

Monitored CARE Reports: These are CARE Reports that are not intended for immediate processing but may be looked into in the future.

The screenshot shows the ADVOCATE interface for a Monitored CARE Report. The top navigation bar includes 'Home', 'Calendar', 'Announcements', 'Students', 'Student Groups', 'Incident Reports', 'Security Reports', 'CARE Network', 'CARE Dashboard', 'Students of Concern', 'CARE Action Plans', 'CARE Reports', 'Reporting', 'Locations', 'User', and 'Resident Assistants'. The main content area displays the report details for C00024-2010, which is in the 'Monitored' status. A 'Possible Next Step' section shows a 'Reopen' button and a note: 'Use "Other Actions" for additional options.' The report is assigned to David Johnson. The 'CARE Report Info' sidebar shows it was created on August 25, 2010, by Paul Stevens, and modified on October 6, 2010, by Symplicity Staff. There are no documents attached to this report.

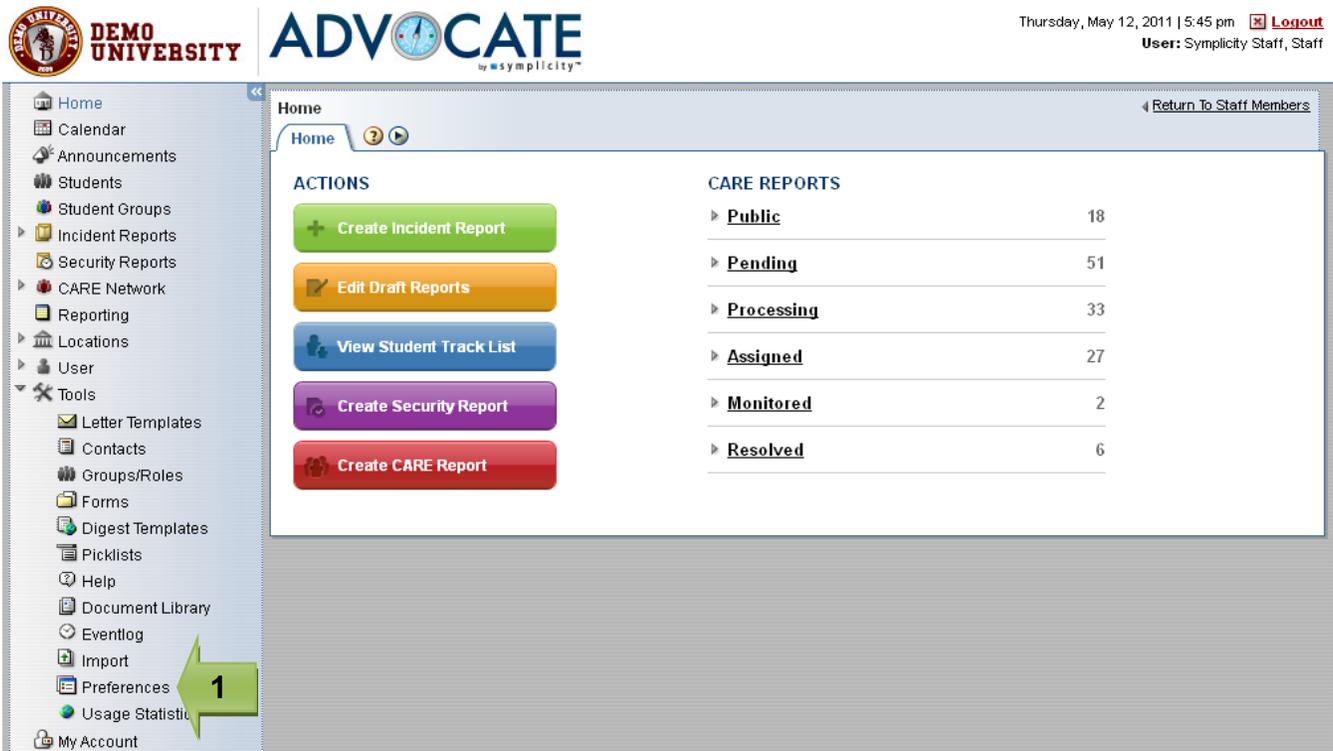
Resolved CARE Reports: CARE Reports that the CARE Action Plans have been marked completed.

The screenshot shows the ADVOCATE interface for a Resolved CARE Report. The top navigation bar is the same as in the previous screenshot. The main content area displays the report details for C00010-2010, which is in the 'Resolved' status. The 'Possible Next Step' section is empty. The report is assigned to Health and Wellness. The 'CARE Report Info' sidebar shows it was created on August 16, 2010, by Collins Amanze, and modified on September 28, 2010. The report type is 'Medical Concern' and the incident occurred on August 15, 2010, at 8:00 pm.

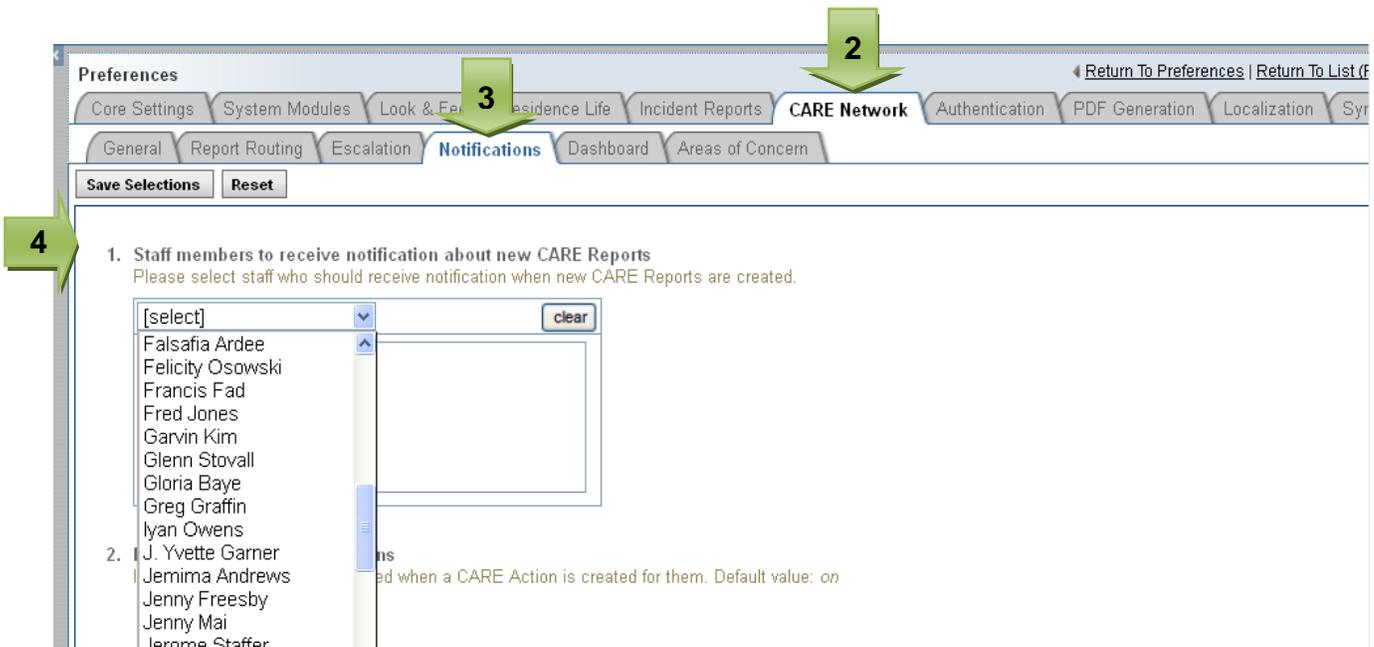
Archived CARE Reports: These are CARE Reports that no longer require any action and are removed from the list of "active" CARE Reports. They could either be deleted from the system or unarchived if there is reason to do so.

The screenshot shows the ADVOCATE interface for an Archived CARE Report. The top navigation bar is the same as in the previous screenshots. The main content area displays the report details for C00015-2010, which is in the 'Archived' status. The 'Possible Next Step' section shows 'Unarchive', 'Purge', and 'Cancel' buttons. The report is assigned to Papa Malu. The 'CARE Report Info' sidebar shows it was created on August 16, 2010, by Collins Amanze, and modified on October 6, 2010. The report type is 'Academic Issues' and the incident occurred on August 16, 2010, at 2:00 pm in Academic Buildings/Biology Lab.

1. Click Preferences (under Tools) at the left navigation menu.



2. Click CARE Network tab.
3. Select Notifications sub tab.
4. If you would like some staff members to be notified of all submitted CARE Reports despite what the report types are, select the names of the staff members on item # 1.



- Turn on item # 2 if you would like to notify students when a CARE Action is created for them. If not, turn it off.

5

Preferences Return To Preferences | Return To List (Pr

Core Settings System Modules Look & Feel Residence Life Incident Reports **CARE Network** Authentication PDF Generation Localization Syr

General Report Routing Escalation **Notifications** Dashboard Areas of Concern

Save Selections Reset

2. Notify Students of CARE Actions
If OFF, students will not be notified when a CARE Action is created for them. Default value: on

off on

- To notify additional staff members of newly submitted CARE Reports base on specific report types, select the name(s) of the user(s) under “Recipients” drop down menu.

6

Preferences Return To Preferences | Return To List (Pr

Core Settings System Modules Look & Feel Residence Life Incident Reports **CARE Network** Authentication PDF Generation Localization Sym

General Report Routing Escalation **Notifications** Dashboard Areas of Concern

Save Selections Reset

3. Additional staff members to receive CARE Report Notifications by report type
Please choose additional staff who should be notified when CARE Reports of a specific type are created

Report Type	Recipient(s)
Academic Performance	[select] <input type="button" value="clear"/> Falsafia Ardee Felicity Osowski Francis Fad Fred Jones Garvin Kim Glenn Stovall Gloria Baye Greg Graffin
Behavioral Intervention Note	Iyan Owens J. Yvette Garner Jemima Andrews
Bias Response	Jenny Freesby Jenny Mai
Clery Reportable	Jerome Staffer Jimmie Dean
Contact Update	Jimmy Johns Joee Doe
Eating Concerns	John-Paul Wolf Johnnie Walker Judette Tobes Platz
Gambling	[select]
Illness / Injury	[select]
Suicidality	[select]
Truancy	[select]
Community Member Concern	[select]
Behavioral Intervention Issue	[select]

- To notify group(s) about newly submitted CARE Reports base on specific report types, select the group(s) under ‘Group Recipient(s)’ drop down menu.

Preferences Return To Preferences | Return To List (Pr

Core Settings System Modules Look & Feel Residence Life Incident Reports **CARE Network** Authentication PDF Generation Localization Sym

General Report Routing Escalation **Notifications** Dashboard Areas of Concern

Save Selections Reset

4. Additional groups to receive CARE Report Notifications by report type
Please choose additional groups who should be notified when CARE Reports of a specific type are created

Report Type	Group Recipient(s)
Academic Performance	[select] <input type="button" value="clear"/> [select] Student Assistants Academic Integrity Admissions Sub-Committee Area Complex Directors CARE Community Assistants faculty
Behavioral Intervention Note	fun group Hall Director
Bias Response	Health Educator Hearing Board Hearing Officer
Clery Reportable	Housing no calendar view
Contact Update	Peer Review Board RA
Eating Concerns	Res Life Residential Life Security Officers
Gambling	[select]
Illness / Injury	[select]
Suicidality	[select]
Truancy	[select]
Community Member Concern	[select]
Behavioral Intervention Issue	[select]

Save Selections Reset



- Click Save Selections.
- Log out and back in for the changes to take effect.

- To view all of your Action Plans, Click “CARE Action Plans” under CARE Network in the left navigation menu.

The screenshot shows the ADVOCATE home page. In the left navigation menu, 'CARE Action Plans' is highlighted with a green arrow and the number '1'. The main content area features a 'Home' header, a search bar, and a 'RECENT ITEMS' list. The 'ACTIONS' section contains five buttons: 'Create Incident Report', 'Edit Draft Reports', 'View Student Track List', 'Create Security Report', and 'Create CARE Report'.

- You must add new Action Plans from a CARE report. Click “CARE Reports” under CARE Network in the left navigation menu.

The screenshot shows the 'CARE Reports' page. The left navigation menu has 'CARE Reports' highlighted with a green arrow and the number '2'. The main content area includes search filters for keywords, report type, date/time, location, and status. Below the filters is a table of reports. A green arrow with the number '3' points to the 'View' icon in the first row of the table.

Actions	Case #	Status	Date/Time of Issue	Report Type(s)	Assigned To	Student(s) of Concern	Last Modified
	C00022-2010	Assigned	Aug 16, 2010 3:00 pm	Academic Issues	Barney Barney	Emily Park James Bruce	4 hours ago
	C00010-2010	Resolved	Aug 15, 2010 8:00 pm	Medical Concern	(Group) Health and Wellness	Shavla Student	4 hours ago
	C00010-2010	Pending	Aug 03, 2010 11:00 am	Medical Concern	David Johnson	Emily Park	6 hours ago
	C00020-2010	Assigned	Aug 09, 2010 10:00 am	Other	Gloria Baye	Jessica Miller Drew Strickland	6 hours ago
	C00019-2010	Public	Aug 15, 2010 9:00 am		N/A		7 hours ago
	C00013-2010	Resolved	Aug 15, 2010 3:00 pm	Academic Issues	N/A	Spencer Terhune	7 hours ago

- Select the CARE Report for which you would like to create an Action Plan and click on the View icon.

C00021-2010

Core Documents [0] Notes [1] Letters [0] Access Rights ?

Pending Processing Assigned Resolved

Next Step:

Create New CARE Action Plan Associate with CARE Action Plan Move to Monitoring

Edit Cancel Actions

CareNetwork Report

Report Number: C00021-2010
Assigned To: David Johnson
Report Type(s): Medical Concern
Date/Time of Incident: Aug 03, 2010 11:00 am
Location: North Campus community
Room: 2859
Students Involved: park, Emily (500000004)
Description: Test

4. To create a new Action Plan, click on the button for Create New CARE Action Plan. (If there is an Action Plan with which you want to associate this current CARE Report, you could click the button to Associate with CARE Action Plan and choose from the list of Plans for that student.)

5

Associating this CARE Report with a CARE Action Plan will make it visible to anyone with access to the the CARE Action Plan.

Submit Save Cancel

CARE Action Plan * indicates a required field

Student*: Emily park () (500000004)

Plan Summary:

Font family Font size

Path: p

Check Spelling

Concern Type: Choose any areas of concern this action plan involves.

- Academic Concern
- Mental Health
- Substance Use/Abuse
- Suicidal/Homicidal Ideation
- Hazing/Organizational
- Violence/Threat of Harm
- Weapons
- Social/Adjustment Issues

Action Status*: Active

1. Click "CARE Dashboard" under CARE Network in the left navigation menu.

Home

Home

Wedge, September 29, 2010 | 10:51 am [Logout](#)
User: Symplicity Staff, Staff

Home

Home

SEARCH

ANNOUNCEMENTS

ADVOCATE STATISTICS AS OF 10:51 AM

Registered Students	1005
Registered Staff Members	55
Residential Life	
Registered Rooms	191
Registered Locations	67
Registered Resident Assistants	40
Registered Supervisors	18

INCIDENT REPORTS

Public	10
Pending	5
Processing	45
Closed	21

2. There are 3 distinct sections to the Dashboard (Queue, Threat Levels*, Comparisons)

CARE Dashboard

CARE Dashboard

TOTAL CASES IN QUEUE

Type of Report: Unassigned CARE Reports

Academic Concern (25%)
Social/Adjustment Issues (42%)
Substance Use/Abuse (8%)
Suicidal/Homicidal Ideation (8%)
Violence/Threat of Harm (8%)
Weapons (8%)

STUDENT INCIDENT COMPARISONS

Type of Case: All Reports Total: 49

Demographics

On Campus Resident	14	28%
Non-Resident	28	57%
Male	24	49%
Female	17	34%

Class Status

JR	7	14%
SR	1	2%
GR	0	0%
SB	4	8%
S2	0	0%
D5	0	0%
D3	0	0%
D6	0	0%
D4	0	0%
SO	10	20%
D1	4	8%
D2	1	2%
FR	0	0%

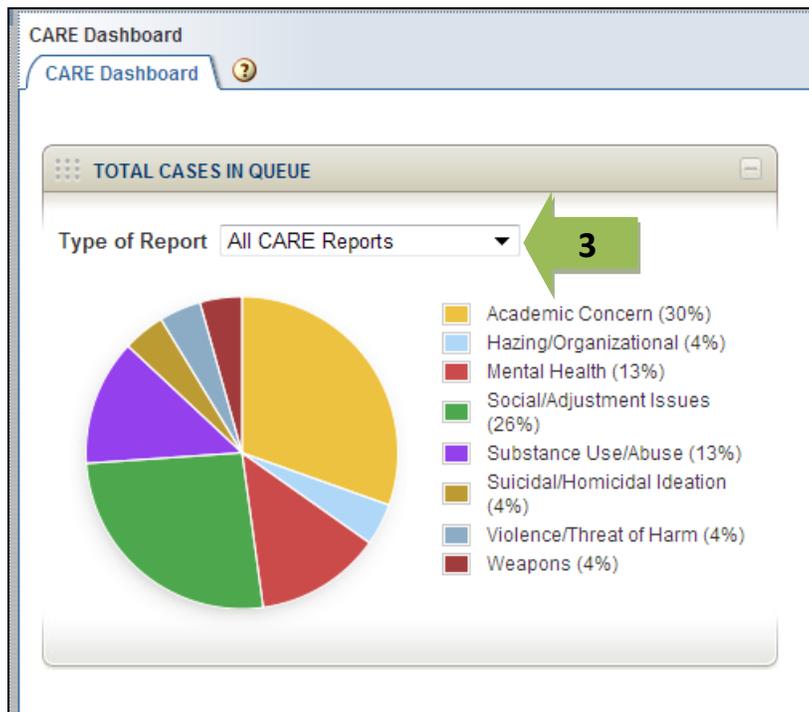
THREAT LEVEL OF CASES

Type of Report: Unassigned CARE Reports

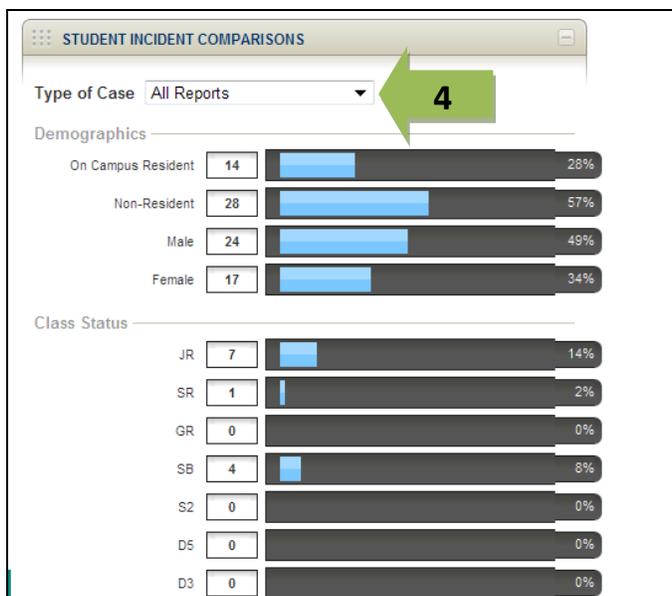
Academic Concern	3	3	
Social/Adjustment Issues	5	1	4
Substance Use/Abuse	1	1	
Suicidal/Homicidal Ideation	1	1	
Violence/Threat of Harm	1	1	
Weapons	1	1	

Level 1 | Level 2: 1 | Level 3: 11

- To view Total Cases in the Queue: Use dropdown in Type of Report to filter how you view the cases listed in the graph. The values listed on the right come from the CARE types you create in your system (Picklists: CARE Network: Concern Types).

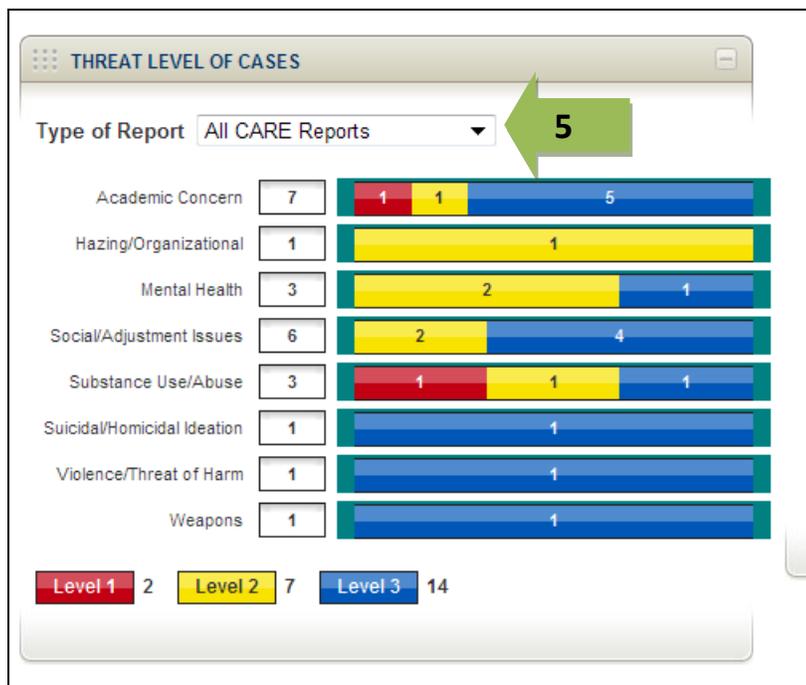


- To view the Student Incident Comparisons: Use the dropdown and filter for the Type of Case you would like to view.



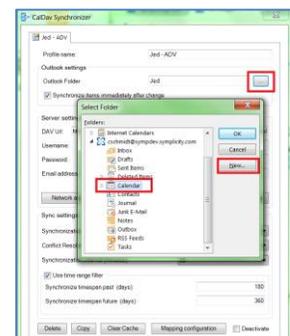
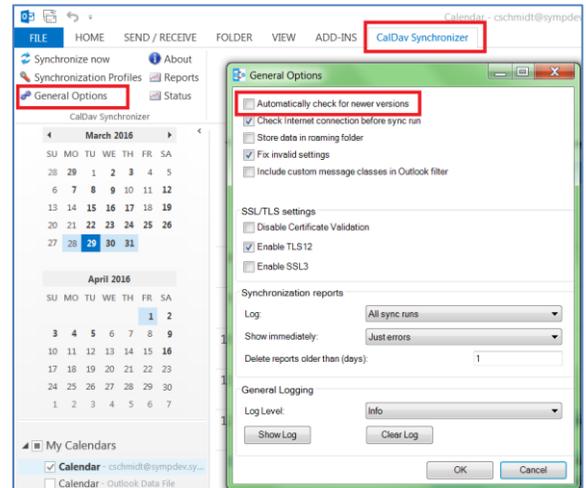
5. To view Threat Levels of Cases*: Use dropdown in Type of Report to filter your view.

*NOTE: The Threat Levels are determined based on a risk assessment algorithm that is available as an additional add on, for a small fee. The algorithm determines level of risk based on information you input into the CARE Report and factors in the Concern Type and Concern Severity the user inputs for each case.



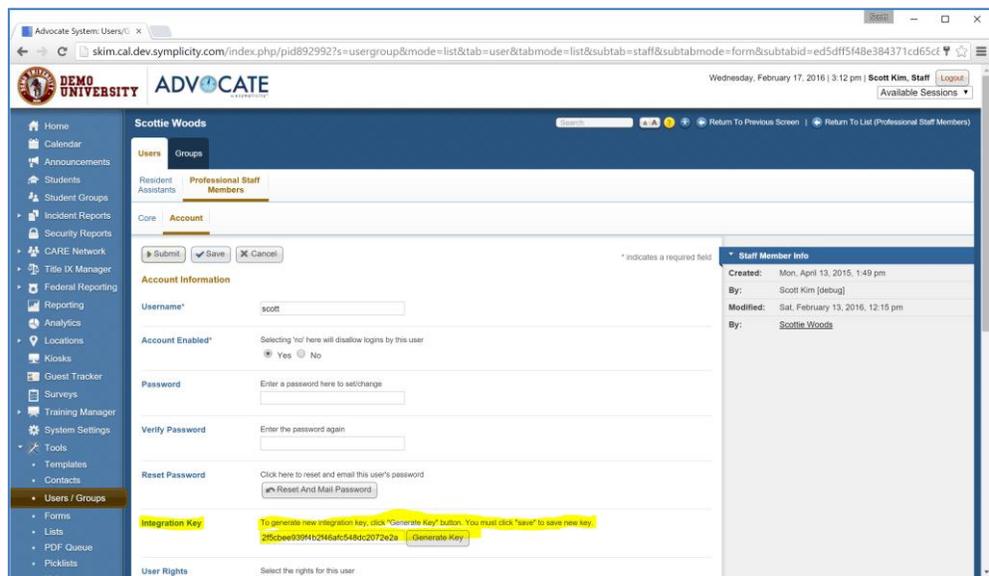
This document will describe how to access and setup the CalDav Synchronization tool that can be used to sync your Outlook and Advocate/GME calendars.

1. Clients may download the plugin from <https://sourceforge.net/projects/outlookcaldavsynchronizer/files/1.19.0/>
***NOTE: Please make sure to download version 1.19.0.**
2. Once the download completes, unzip the downloaded file and double click setup.exe file to install the plugin.
3. Follow through the installation process to install the plugin.
4. Once the installation is completed, open Outlook.
5. You will see that there should be new tab (for Outlook 2013) called "CalDav Synchronizer". It should be the last tab you see.
6. Click on that tab and you will have four icons: Synchronize Now, Synchronization Profiles, General Options, and About.
7. Click on General Options and a new window will pop up. Uncheck "Automatically check for newer versions" if has not already been unchecked. Doing so will keep your CalDav Synchronizer plugin from updating and maintain version 1.19.0. Click OK.
8. Click on "Synchronization Profiles" and a new window will open where you will be able to enter in the details for integration. Click on the "Add" button and then select "Generic CalDAV/CardDAV," then OK.
9. For the most part, the settings on the top half of the setup will be all that are necessary to review/modify. Users are also welcome to explore settings in lower half of the setup to meet their needs.
10. Please modify the following values to setup the integration:
 - a. Profile Name: You can give it any name but a simple "Advocate CalDav Sync" should be sufficient.
 - b. Outlook Folder: We recommend that you create a brand new calendar to sync with Advocate calendar. This will make it easy to manage events from Advocate and not mix with your existing calendar events. To do this, click on the box next to the "Outlook Folder" field (three dots) and click on the main "Calendar" icon (not internet calendar). Then click "New" and give the calendar a name (e.g. Advocate Calendar). Click OK and then OK again.
 - c. Server Settings:



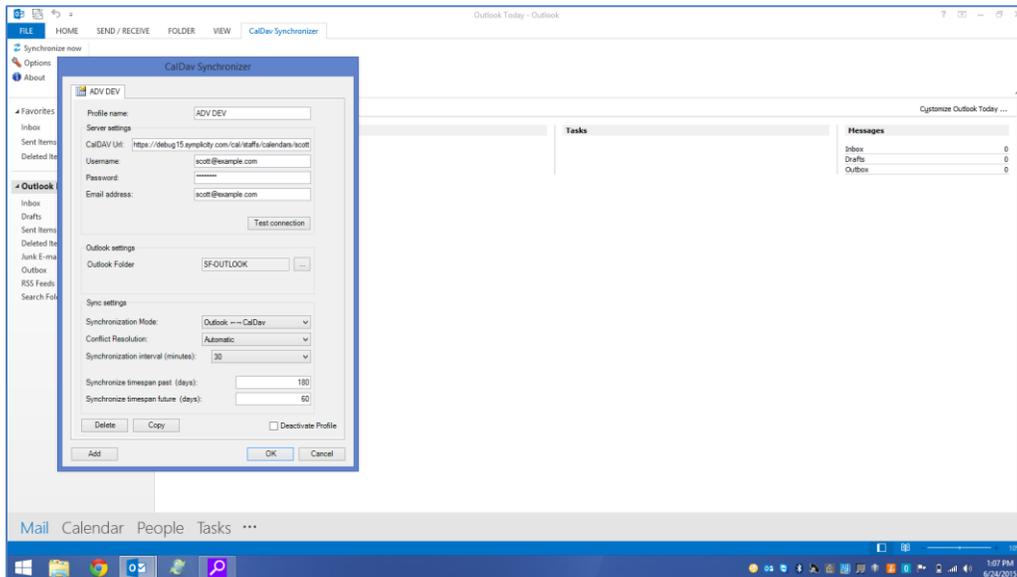
- i. DAV Url: This Url depends on the Symplicity app you with which you are synchronizing. For Advocate, the URL should be as follows:
[https://\[schoolname\]-advocate.simplicity.com](https://[schoolname]-advocate.simplicity.com)
- ii. Username: This is username to log into the Advocate system.
- iii. Password: This is password tied to above username.
**NOTE: Users with a single sign on (LDAP/CAS/Shibboleth etc) will require use of a new Integration Key field that can be found in My Account>My Password in Advocate/GME.*

Therefore, the user will need the “My Account (Edit)” right in Advocate. The “Calendar Synchronization” user right should be given to the user as well. The password for the CalDav Synchronizer will be this Integration Key.

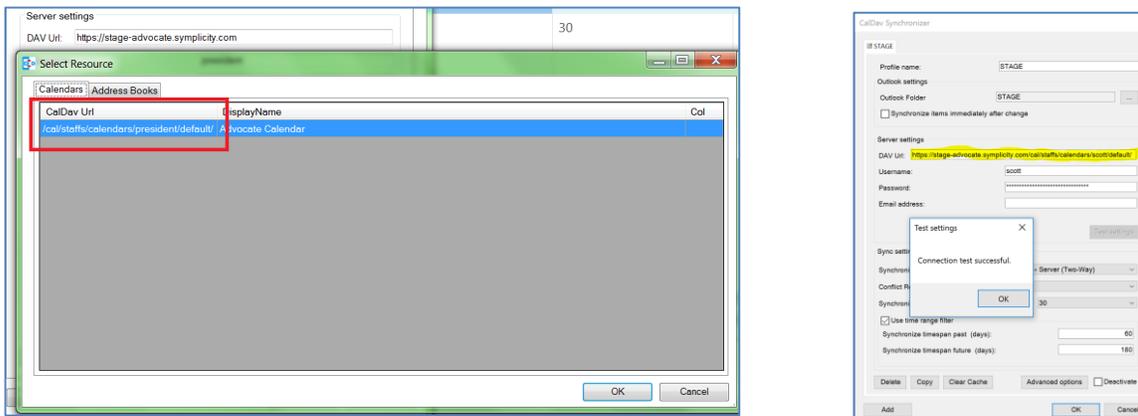


- iv. Email address: The email address in Advocate for the username/password above.

11. Once you typed in all setup info, it should look something like this:



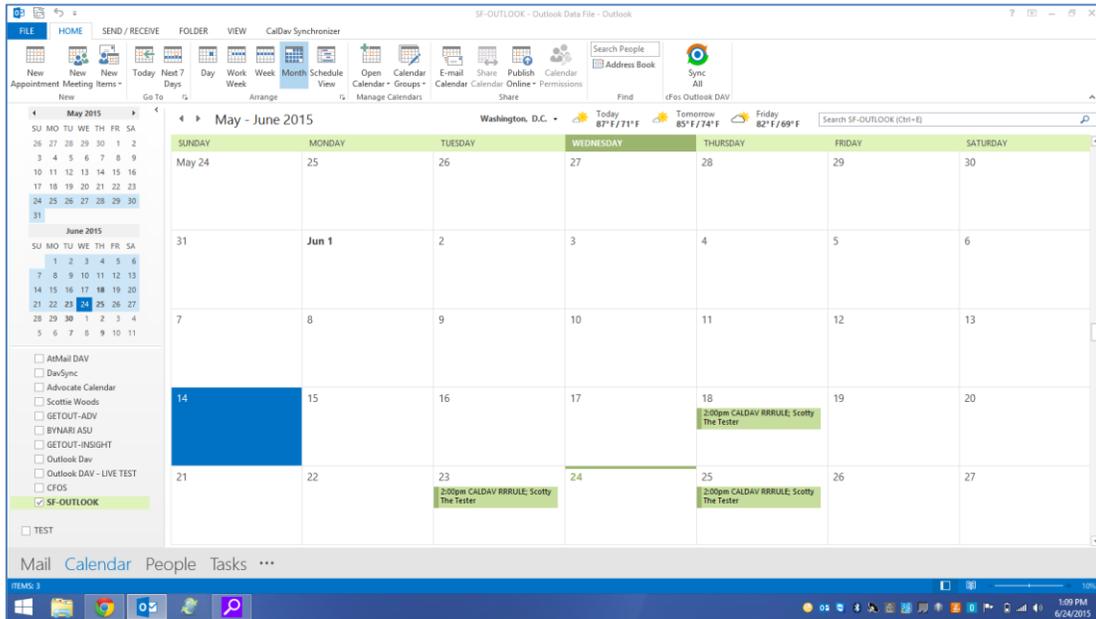
12. Once you have added the information, click on “Test Settings” which allow which will allow you to make sure that the settings are done correctly and that Outlook has correctly



connected to Advocate/GME. An additional window should pop up called “Select Resource” which should show more of the CalDAV Url, including your username. Click OK. If correct, you will see a notification of a successful test.

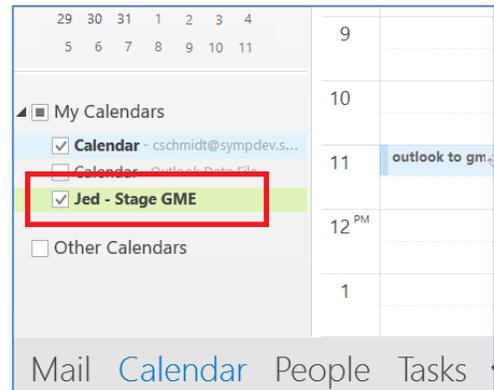
***NOTE:** you will also see the DAV Url field update to include the entire Url associated with the integration.

13. Once you click OK, events should sync in and it should look like this:



14. Finally, make sure to check the newly created calendar on the left so that you data will show.

15. You can then use the “Synchronize now” button” to synchronize the Advocate/GME calendar with Outlook. In “Synchronize Profiles” you can set the “Synchronization intervals” to determine how often the sync will run automatically (or only manually if you choose).



Advocate offers a number of options to sync meetings and sanctions with existing calendaring software. This document will review how to integrate Advocate with your Google Calendar.

Enabling Integration for Users

Users, who plan to utilize the syncing capability with Google, will first have to have the associated user right assigned to them. To do this:

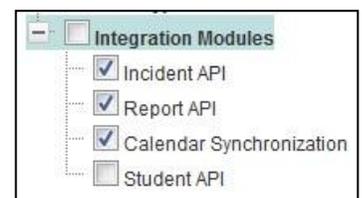
1. Find the user under **Tools > Users/Groups** (left navigational menu).
2. **View** or **Edit** the record.



3. Select the **Account** tab.



4. Check the box next to **Calendar Synchronization** under **Integration Modules** (toward the bottom) and select **Save** or **Submit**.



Calendar Settings

You will next navigate to the My Calendar tab in the My Account item on the left navigation menu to configure calendaring. This section will discuss the settings found on this in detail, with Google synchronization discussed in the next section.

1. Filter meetings on calendar by

This will cause meetings to appear on your calendar according to whether you created them (created by user) or the case with which the meeting is associated (if applicable) is assigned to you (assigned to user). Those Advocate users who have administrative staff doing data entry on their behalf should select “assigned to user” as long as the case is assigned to them.

2. Filter sanctions on calendar by

This will cause sanctions to appear on your calendar according to whether you created them (created by user) or the case with which the sanction is associated (if applicable) is assigned to

you (assigned to user). Those Advocate users who have administrative staff doing data entry on their behalf should select “assigned to user” as long as the case is assigned to them.

3. Enable Synchronization of Calendar Events

This will allow events created directly on the Calendar in Advocate to appear in the Advocate user’s Google Calendar.

4. Enable Synchronization of Incident Meetings

This will allow meetings created within Incident Reports to appear in the Advocate user’s Google Calendar.

5. Enable Synchronization of Sanctions

This will allow Sanctions created within Incident Reports to appear in the Advocate user’s Google Calendar.

6. Enable Synchronization of CARE Meetings

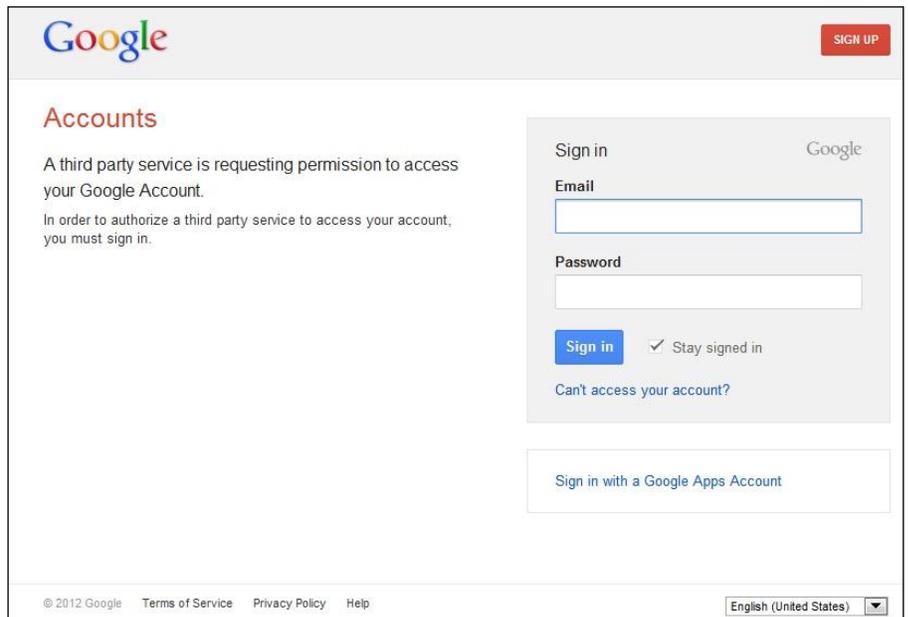
This will allow meetings created within Incident Reports to appear in the Advocate user’s Google Calendar.

7. Authorize Simplicity on Google Calendar

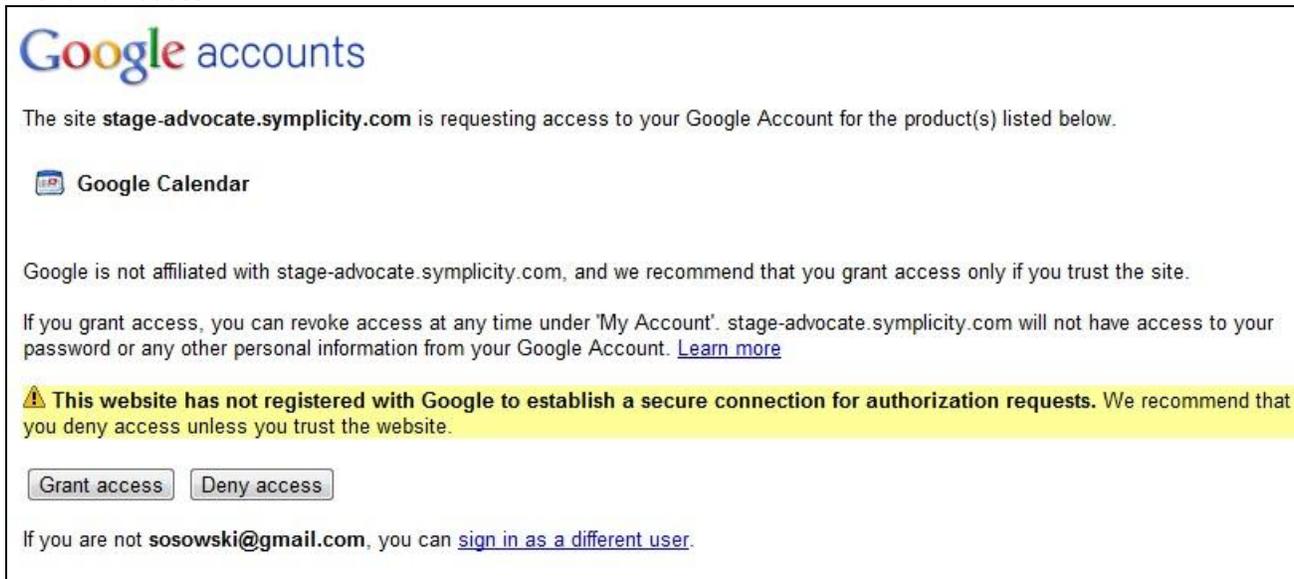
This authorizes the above information to be shared between Advocate and the user’s Google Calendar. This setting will be discussed next in more detail.

Authorizing Google

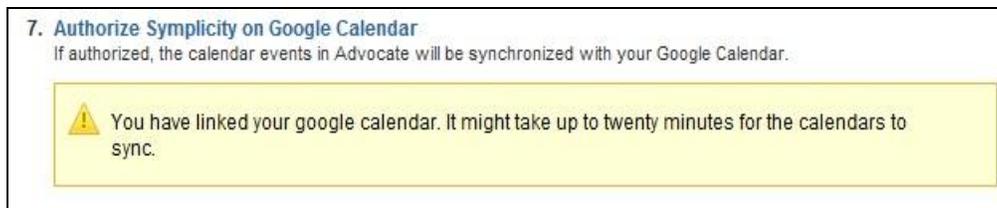
1. In order to enable the synchronization with Google Calendar, select the Authorize button under #7 on the My Calendar tab within the My Account section.
2. You will be brought to the Google sign in screen, where you should sign into your Google account.



3. After signing in, you will be asked to confirm that Advocate can access Google Calendar. Select Grant Access.



4. You will then be navigated back to Advocate which will display the message that you have linked Advocate to your Google Calendar.



5. If you go back to the My Calendar tab, you will note you have the ability to revoke this authorization should you choose to. Please note that items already in your Google Calendar will remain in place after revocation. The revocation will mean that no items going forward are pushed to Google Calendar.



An Important Note about Two-way Sync

The nature of the sync is such that calendar items created in one source will appear/sync to the other source. Please note that amendments should be carried out at the source. In other words, if you created a meeting in iCal, update the meeting in iCal; if you created a meeting in Advocate, update the meeting in Advocate. This way, the notification and editing functions will only work properly at the point of

origination. **Because you are creating a new calendar to enable the integration, if you wish to have events feed back into Advocate to update and block off availability, you should use this newly created calendar to input all scheduled meetings. You may wish to export events from your existing calendar and import them into the new calendar to ensure all of the information in the new calendar is current.**