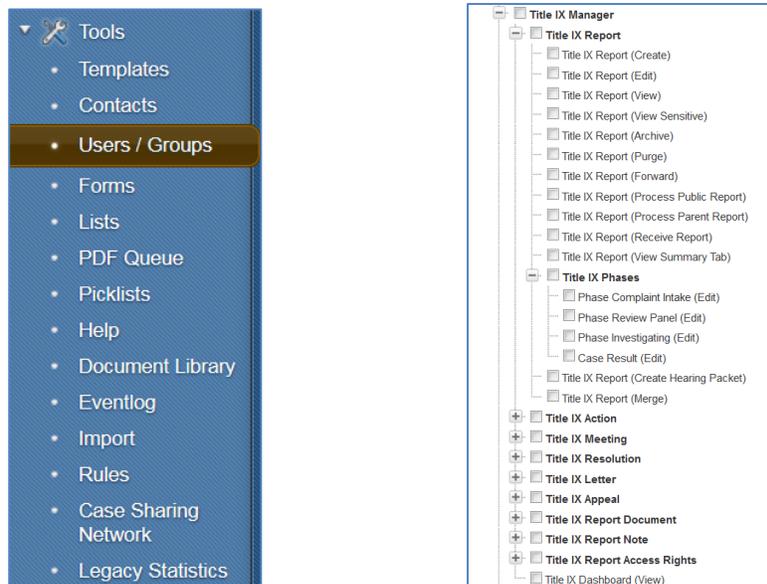


## Title IX Manager Setup

This document will outline how to setup, configure, and customize the Title IX Manager so that users can begin processing Title IX reports.

### User Rights

There are many user rights associated with the Title IX Manager. These allow you to view, create, edit, and process Title IX Reports and Title IX Actions, as well as access the Dashboard. The new rights can be found via the left navigation menu, under Tools>Users/Groups. If you edit a Group or the Account tab for an individual user, go to the User Rights section and look for “Title IX Manager” in the user rights tree:



For a complete list of the Title IX user rights and their definitions, see the document “*Title IX User Rights*.” You should review these user rights and apply them to User Groups or individual staff prior to full implementation of the Title IX Module.

### Title IX Forms

In order to begin using the Title IX Module, it is necessary to recognize that while some data is formalized because of Title IX requirements, users have the ability to customize other data that is entered into Advocate. The majority of Title IX Report data is entered via the Title IX Report forms.

We have added fields to these forms by default, so that you can capture data that is necessary regarding Title IX reports. You do have the ability however to create new

custom fields based on your campus needs. There are many Title IX related forms in system but they can be grouped into categories:

1. Title IX Report forms – these allow you to configure the fields for adding Title IX report data into the system, both as a logged in staff member and an external user without direct access to Advocate. Additionally, these allow you to make phase and case decisions.
2. Title IX Meeting forms – these allow you to configure the fields for Title IX meetings, associated with Title IX reports.
3. Title IX Action forms – these allow you to configure the fields related to Title IX Actions associated with Title IX Reports.
4. Title IX Appeal forms – these allow you to configure the fields related to appeals of Title IX report decisions, for both the Complainant and Respondent.
5. Title IX Resolution forms – these allow you to configure the fields related to Title IX report outcomes for both the Complainant and Respondent.

To edit Title IX forms, go to the left navigation menu, and select Tools> Forms. In the “Label” field at the top, type “title” to see a complete list of all the associated forms. For instructions on using the Forms editor tool, see the document called “*Advocate – Form Builder.*”

### Picklists

Picklists are a tool that allow users entering data to literally pick from a predetermined list of values. When a field is created on a form and determined to be a Picklist (Widget = Picklist OR Widget = Checkboxes OR Widget = Radio Buttons) and the form is saved, the field will show in the list of picklists under Tools>Picklists on the left navigation menu. Select the correct picklist by clicking on its underlined title.

*NOTE: The name of the picklist will correspond to the field name on the form and the “Forms” tool.*

Items 1-20 of 45		Showing 20	Jump 1	Next >
Display Name	Description	Hierarchical	Pick Count	
<u>Address: Country</u>	List of Country values	No	239	
<u>Address: State</u>	List of State values	No	53	
<u>Administrative Action: Aggravations</u>	List of aggravation values	Yes	2	
<u>Administrative Action: Appeal Category</u>	List of Appeal Category values	No	3	
<u>Administrative Action: Charges</u>	List of Charges values	Yes	9	

Utilize the  icons to add items to the picklist:

a. Click the  at the top of the list on the right side to begin your picklist.

*NOTE: If you fail to save your work between items, your newly created items will be blank. It is recommended that you first create the desired number of extra items, type your values into the picklist item, then save your work.*

b. Within the picklist, select the  (left hand icon) to add a new item directly below the row from which you have made your selection.

c. For Hierarchical Picklists: If you would like to create a sub item, click on the  (middle icon) in the row that will contain the sub item.

Batch Tool: Archive ▾					
Edit / Review Hierarchy	Definition	Incident Scoring			
 Staff Complaints	0	<input type="checkbox"/>	  		
ADA violation	0	<input type="checkbox"/>	  		
Title IX violation	0	<input type="checkbox"/>	  		
 Faculty Complaints	0	<input type="checkbox"/>	  		
Harrassment	0	<input type="checkbox"/>	  		
Faculty Handbook violation	0	<input type="checkbox"/>	  		

4. To make changes to already-saved picklist items, simply click on the text you want to modify.
5. When finished, click **Save** to save changes and remain on this page, or click **Submit** to save changes and go back to the list of Picklists. These forms are edited like any other form in the system.
6. Advocate has several default picklists related to Title IX already in the system, and most of them have some default picklist values that might be of use (though those values can be modified). Please make sure to review each of these to determine which are necessary for your institution. The default picklists are:
  - a. Title IX Action: Action Status
  - b. Title IX Action: Action Type
  - c. Title IX Appeal: Appeal Category
  - d. Title IX Appeal: Appeal Type
  - e. Title IX Report: Reporter Type

f. Title IX Resolution: Resolution Type

**Title IX Actions**

One of the key workflow pieces to processing Title IX Reports is the Title IX Action. This is an action associated with a Title IX Report, where the user is recording measures taken throughout the case for both the respondent and complainant(s) involved with the child case for each phase of the case. The values for the Title IX Actions are stored in the Title IX Action: Action Type picklist. Advocate has provided some default values for this picklist, but you should review them and determine which are necessary for your institutional processes.

Title IX Actions can be added during any phase of a processed Title IX Report. Following the creation of an action, meetings can be Requested/Scheduled and letters can be created.

*NOTE: Meetings can be Requested/Scheduled and letters can be created independent of a Title IX Action as well.*

**Title IX Resolutions**

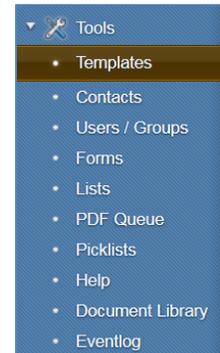
Title IX Resolutions are the ultimate outcomes to a Title IX report, normally added when it is determined that there was a violation. Resolutions are like Sanctions in the Incident Report process and are entered when a Title IX Case Decision is made. Values for the Resolutions picklist are stored in the Title IX Resolution: Resolution Type picklist. Advocate has provided some default values for this picklist, but you should review them and determine which are necessary for your institutional process.

Batch Tool: Archive		Edit / Review Hierarchy		Details	Reminder Delta	Resolution Window	
Attendance for training		0	0				
Class registration preference		0	0				
Completion of an online training course		0	0				

The first column allows you to enter the name of the Resolution that will be shown when you are selecting it in the case. The “Details” column is the default language for the Resolution that will appear when it is selected, though it can be modified when used. The “Reminder Delta” refers to the number of days BEFORE the deadline the student will receive notification to complete the Resolution. The “Resolution Window” refers to the number of days in the future the Resolution Deadline should automatically pre-populate to. For example, if you enter 42 then the deadline will automatically fill in with six weeks (42 days) from today, which can then be edited by the user. Like the “Details” the deadline can still be edited when the Resolution is being entered.

## Templates

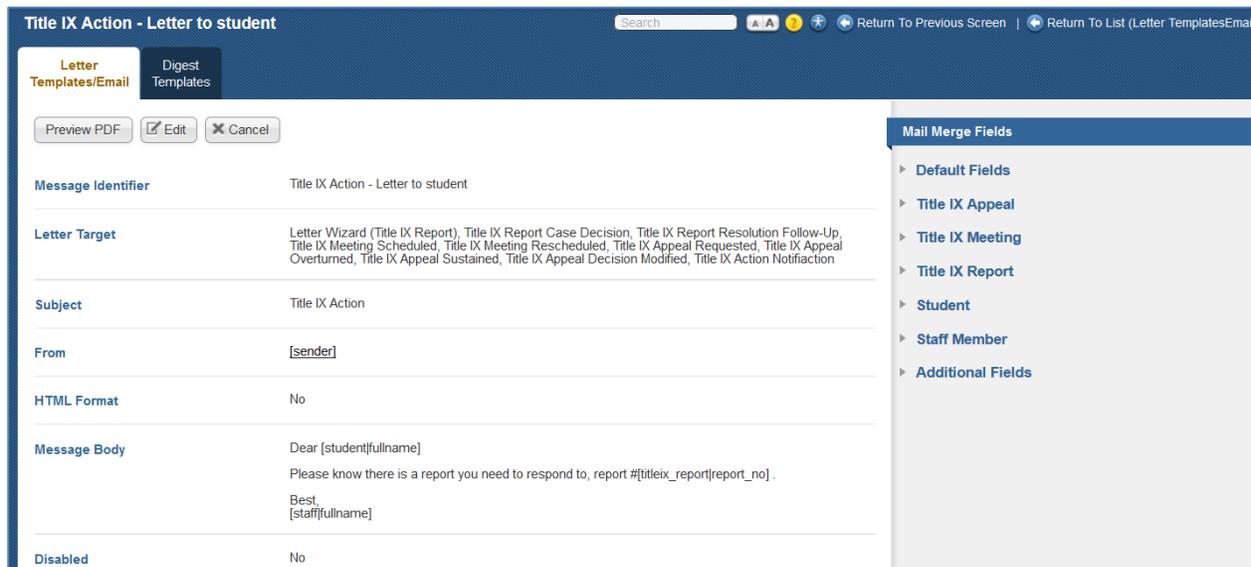
In order to ensure that students and staff are properly informed of the details of Title IX Reports and subsequent processing thereof, users should review Templates in Advocate. Templates serve as a tool that allow users to have letters with general information infused with merged data related to Title IX Reports, Title IX Actions, Resolutions, Meetings, Appeals, etc.



### Letter Templates

To review Letter Templates, go to the left navigation menu and Tools>Templates>Letter Templates>Email. There are two types of Letters Templates that should be reviewed: User Messages and System Messages.

- User Messages are created by users (though there are default templates added already that can be modified) and are typically sent out by the user when processing a case (e.g. sending a hearing notification or decision letter to a Complainant/Respondent).
- System Messages are typically sent out automatically by Advocate when some sort of event happens (e.g. new Title IX Report notification or Title IX Report Forward Notification).



The following are the **System Messages** related specifically to the Title IX Module:

- Meeting Reminder
- New Public Title IX Report Notification
- New Public Title IX Report Notification To Reporter
- Symply Notify of Title IX Report
- Title IX Action Assigned

Title IX Action Missed Deadline notification  
Title IX Action Notification  
Title IX Appeal Submitted  
Title IX Appeal: Decision Modified  
Title IX Appeal: Decision Overturned  
Title IX Appeal: Decision Sustained  
Title IX Meeting Invitation  
Title IX Meeting Request Confirmation (Student)  
Title IX Meeting Schedule Updated  
Title IX Meeting: Meeting Requested (Student)  
Title IX Meeting: Meeting Rescheduled (Student)  
Title IX Meeting: Meeting Scheduled (Student)  
Title IX Report Case Decision Notification  
Title IX Report Forward Notification  
Title IX Report Meeting Request Notification (Staff)  
Title IX Report modified/updated  
Title IX Report Notification  
Title IX Report Notification: Student Respondent  
Title IX Report Notification: Tracked Student  
Title IX Report Phase Decision: Complaint Intake  
Title IX Report Phase Decision: Investigating  
Title IX Report Phase Decision: Review Panel  
Title IX Report Resolution Follow-Up  
Title IX Report: New Note Added  
Title IX Report: Student Group Notification (Student Group Involved)  
Title IX Report: Student Group Advisor Notification (Student Group Involved)  
Title IX Report: Student Group Advisor Notification (Student Respondent)  
Title IX Report: Student Group Notification (Student Respondent)  
Title IX Report: Student Group Primary Student Contact Notification (Student Group Involved)  
Title IX Report: Student Group Primary Student Contact Notification (Student Respondent)  
Title IX Resolution Deadline Missed Notification (Student)  
Title IX Resolution Deadline Missed Staff Notification  
Title IX Resolution Deadline Reminder (Student)  
Title IX Student Appeal Notification  
Unassigned from Title IX Report  
Upcoming Title IX Action Deadline Reminder

Additionally, we have provided several User Messages that might be useful for your process, to help you get started in setup. You can customize these templates further to match your institutional language. For information on creating and editing letter templates, see the document “*Advocate Creating Letter Templates July 2015.*”

The following are the **User Messages** we have provided:

- Notice of investigation
- Initial contact/scheduling of accused party
- Initial contact/scheduling of witnesses
- No contact directives
- Persona Non Grata / Campus ban
- Follow-up with witnesses
- Notice of charge to accused party
- Final investigation report
- Findings and sanctioning of accused party
- Notice of hearing
- Notice of hearing outcome (rendered by hearing board)
- Notice of hearing outcome (rendered by investigator)
- Notice of appeal to parties
- Notice of final determination (no appeal)
- Notice of final determination (post-appeal)

When you are creating a new letter template, one of the pieces of required information is the Letter Target. The letter target allows you to choose which steps of the process should allow use of the template. Select as many as needed. Merge codes that are appropriate to the chosen target(s) will appear on the right after the template is saved.

The following are **letter targets** specific to the Title IX module:

- Title IX Report Phase Decision: Complaint
- Title IX Report Phase Decision: Review Panel
- Title IX Report Phase Decision: Investigating
- Title IX Report Case Decision
- Title IX Report Resolution Follow-Up
- Title IX Meeting Requested
- Title IX Meeting Scheduled
- Title IX Meeting Rescheduled
- Title IX Appeal Requested
- Title IX Appeal Overturned
- Title IX Appeal Sustained
- Title IX Appeal Decision Modified
- Title IX Action Notification

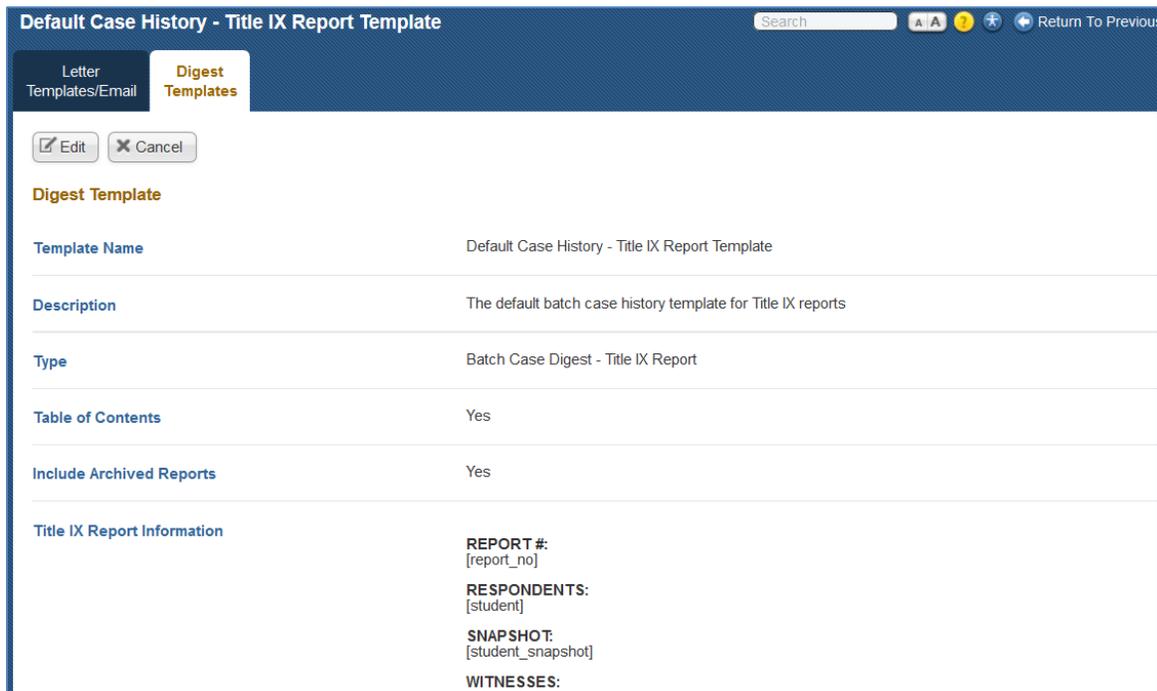
*NOTE: Letter Wizard should only be utilized as a target when you are sending a notification that includes data to merge from only Title IX Report. It is not an appropriate target for letters that may be used to communicate about Title IX Actions, Title IX Meetings, or Title IX report follow-up including meetings, findings of responsibility, and resolutions.*

For information on creating and editing letter templates, see the document “*Advocate Creating Letter Templates July 2015.*”

**Digest Templates**

Digest templates are a tool that allow data to be merged into a PDF for eventual viewing, printing, or forwarding to others on campus. These PDFs can be created individually via the Other Actions menu on the Core Information tab for a Title IX Report, or via Batch Options from the main Title IX Report list.

Advocate has provided you a Default Title IX Hearing Packet and Default Case History – Title IX Report Template that can be used by your institution. This Hearing Packet and



Case History are the perfect tools for providing information about a Title IX Report and it’s processing to others in a combined PDF – Report, Action, Resolution, Note, Documents, and Letter information can be shown.

Please review the Default Title IX Hearing Packet and the Default Case History – Title IX Report Template and make any modifications that are necessary to meet your information sharing needs. For further information on creating and editing Digest Templates see the documents “*Advocate – Working with Digests 07-2015*” and “*Advocate & GME – Hearing Packets – July 2015.*”

### Appeals

If your institution allows for appeals related to Title IX Reports, it is necessary to review the appeal process within Advocate as well. Both Respondents and Complainants have the ability in Advocate to appeal a Title IX Case Decision. In order to setup the Appeal process, it is necessary to review the following:

1. Forms – specifically Title IX Appeal – External Request Form (if you will be allowing a student to submit appeals online) and Title IX Appeal – Staff Request Form (used when a staff members enters a student’s appeal manually).
2. Picklists – specifically “Title IX Appeal: Appeal Type,” which relates to those institutional entities that will be hearing Title IX case appeals (e.g. University President, Provost, Board of Trustees, etc.). These values will be displayed in the System Settings for appeals as well (Title IX Manager>Appeals>#2 and #9).
3. Templates – it will be necessary to review both User Messages and System Messages that are used with the appeal process to make sure that appropriate information is being sent via those messages.
4. System settings – review the system settings found in System Settings>Title IX Manager>Appeals. These will allow you to enable/disable the appeal process, set up form to section mapping, setup some notifications, etc.

### System Settings

The final significant piece to setting up the Title IX Manager module relates to a review of the system settings (found on the left navigation menu in “System Settings”). These settings are global in nature and reflect all users of the system, both internal and external. Those setting up Advocate should review all system settings to adequately prepare the system, but review of those relating to Title IX Manager specifically are found in System Settings>Title IX Manager. The Title IX Manager tab in System settings has several subtabs that relate to specific functions in the module:

- General: relates to enabling/disabling of the module, allow/disallow sensitive Title IX reports, etc.
- Public Reporting: relates to the setup of the Title IX Public Report, its setup, notifications, etc.
- Escalation: relates to promoting Title IX reports to Incident/CARE Reports
- Notifications: relates to use of Title IX messages that sent from the system
- Meetings: relates to setup of Title IX Meetings, including use of the Request Meeting model, default meeting participants, etc.
- Actions: relates to Title IX Actions, including form mapping and notifications

- Resolutions: relates to use of Title IX Resolutions, including default deadlines, use of amounts, and formatting
- Appeals: relates to setup of the Title IX Appeal process
- Dashboard: relates to setup of the Title IX Dashboard