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Title IX

The Basics

18 ADVOCATE | SYMPOSIUM

Introductions

- Jacob Harper
  - Lead Product Support Specialist
  - 10 Years Higher Education Experience
  - 5 Years with Symplicity

A few questions to start us off..

- How familiar are you with the Title IX module?
- What are you hoping to gain from this session?

Agenda

- Core vs. Full
- Collecting Reports
- Process/Workflow
- Title IX Actions
- Letter Templates / System Messages
- Rules
- Reporting

Core VS. Full Version

- Core Version
  - TIX Reports & Forms
  - TIX Form Letters
  - TIX Dashboard
  - Reporting
  - User Rights
  - Other Actions > Send Letter– Documents & Notes– Print Report

- Full Version
  - Everything in Core Version PLUS
  - TIX Case Management
  - External TIX Report Form
  - TIX Report Rules in Rules Engine
  - Localizable Forms
  - Meetings
  - Resolutions
  - TIX Actions
  - Automatic Notifications
  - Simultaneous Appeals
  - TIX Report Eventlog
  - Reporting on TIX Meetings, Actions, Resolutions, Appeals
  - Hearing Packets
  - Case History
  - Training Manager
  - Canned Climate Action Survey
  - Robust User Rights

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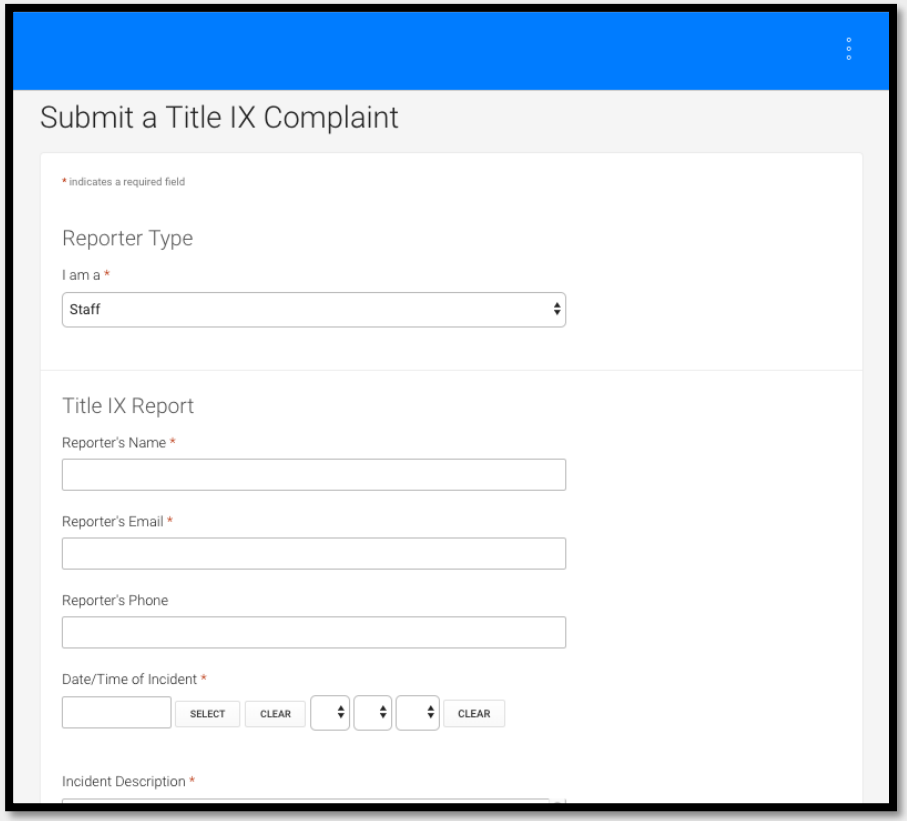
Collecting Reports

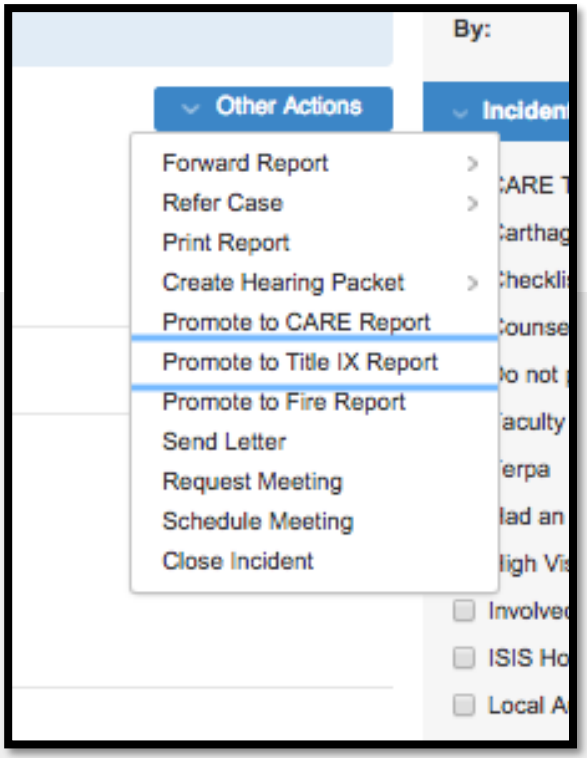
Public Title IX Report

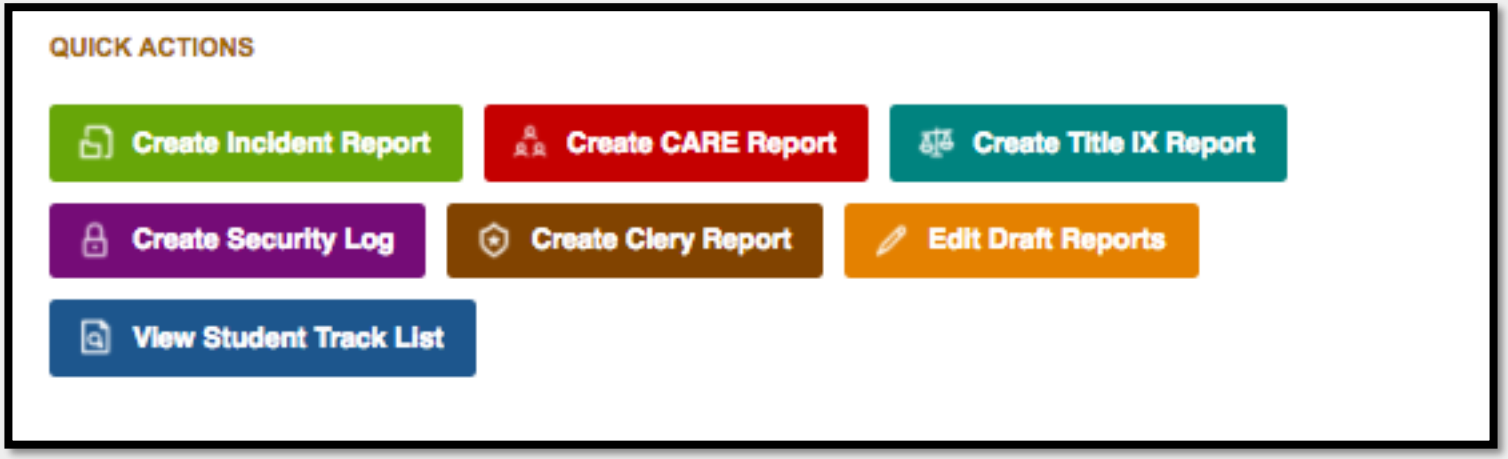


- Public Webpage
- Authentication (if desired)

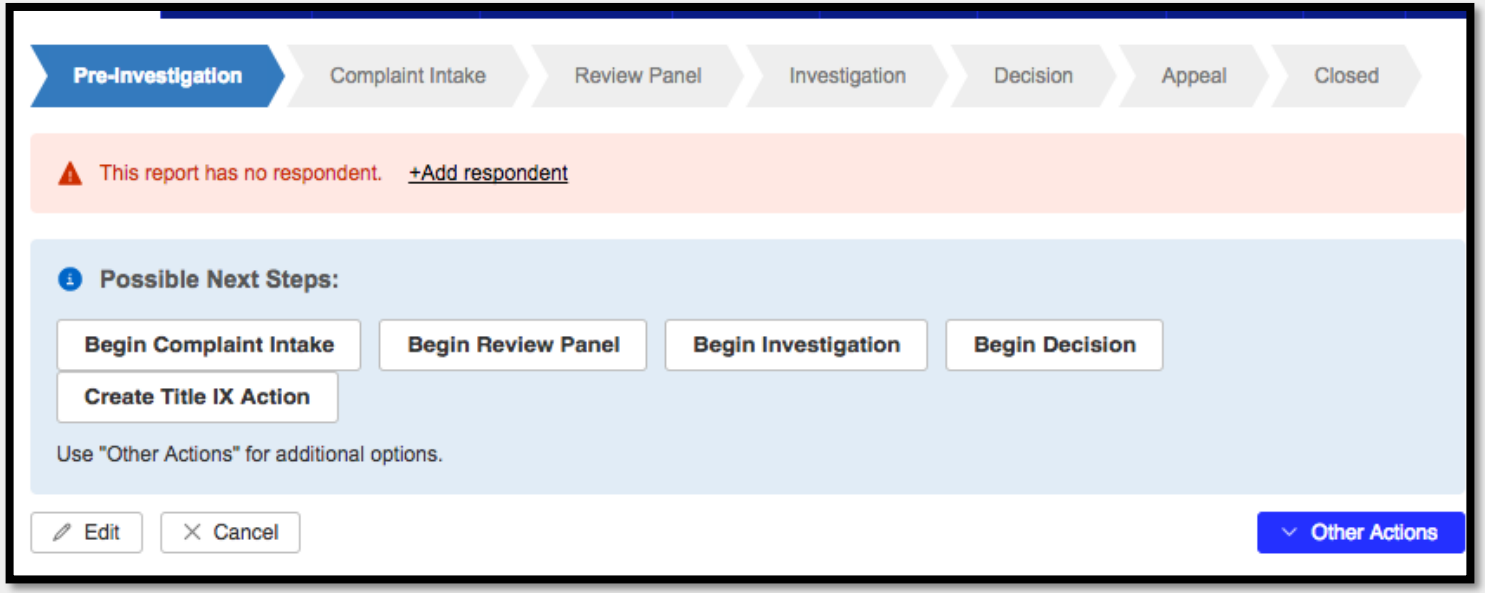
Internally Created

- Manager Users
- Resident Assistants
- Promoted Reports





Adding Respondent Post Submission of Report



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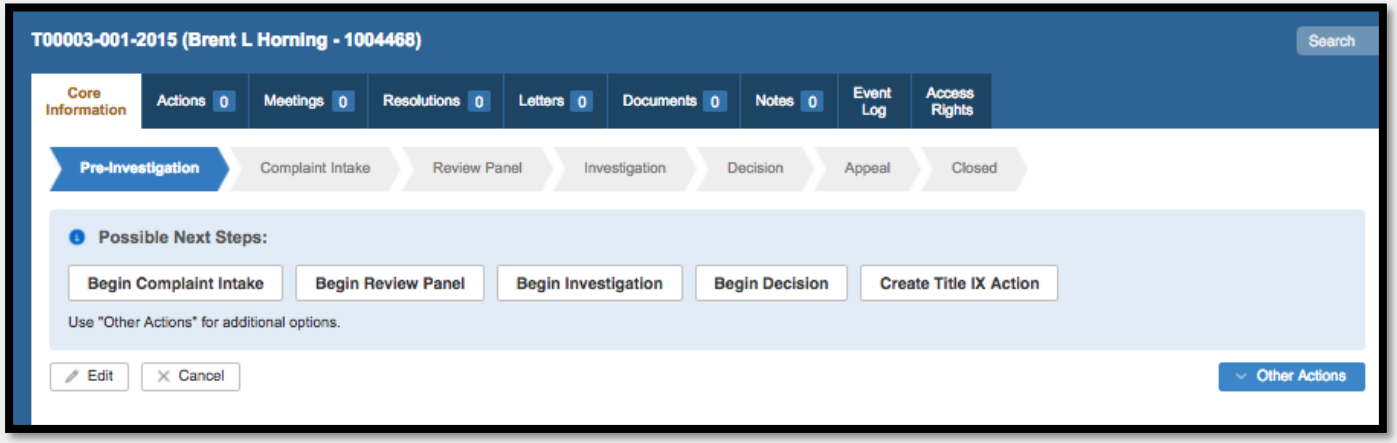
Process / Workflow

Process / Workflow

- Non-Linear Process
- Report Processed in Phases



Report Phases

- Not a Title IX
- Review Panel
  - Track progress if your process involves use of a panel or group of reviewers
- Investigating
  - Track the progress of your investigation of the report
- Decision
  - Determinations of violations and resolutions can be entered

Report Phases

- Appeal
  - Appeal of a Title IX decision that has been rendered.
- Closed
  - Closed Reports
- Archived
  - The ability to purge reports.

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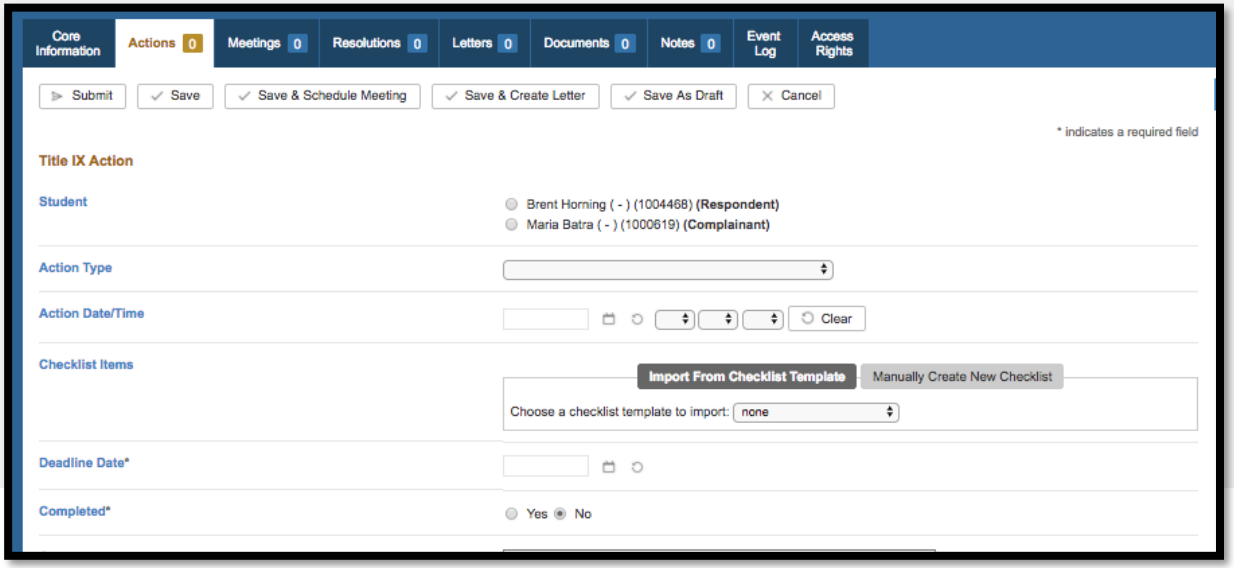
Title IX Actions

Title IX Actions

- Manner to identify follow-up (respondents & complainants)
  - Manually Create
  - Import Checklist



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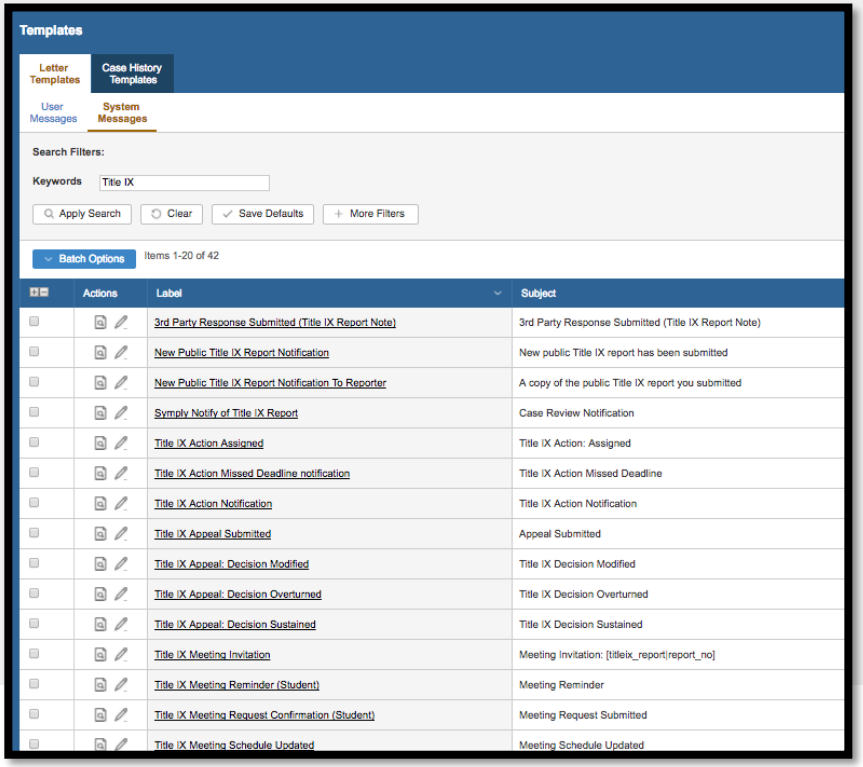
Letter Templates / System Messages

Letter Templates / System Messages

- Institutional Branding
- Notification throughout the process



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Rules

Rules

- Report Submitted
  - Notification
  - Assignment
  - Access
- Report Modified
  - Notification (Staff / Group)

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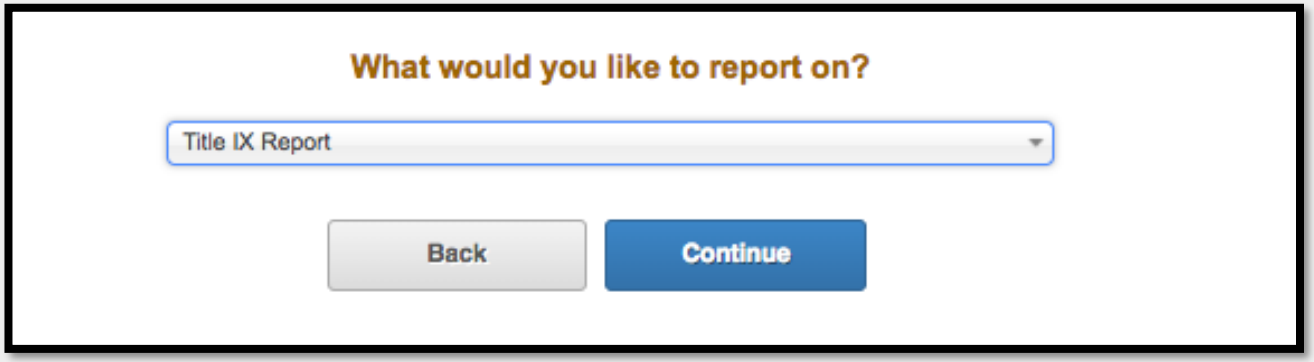
Reporting

Reporting

- Report
- Meeting
- Resolution
- Actions
- Appeals



LIVE DEMO

ADVOCATE

Resources

- Additional Modes of Support
  - Support Line: **(703) 373-7035**

    (9 am to 8 pm EST)
  - Support Email: **[your school]-advocate-support@symplicity.com**
  - Neighborhood: **https://neighborhood-community.symplicity.com**
  - Your Client Manager or Account Executive

Contact Information

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