



Custom Reporting in Maxient

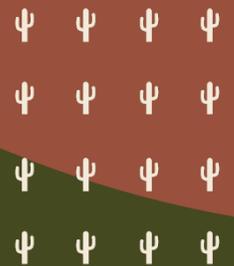


Mike Ferrara

Director of Client Implementations

Sticking to the Basics

This will be an overview of the Custom Reporting feature in your Maxient System. This is not an exhaustive tutorial. We will try to reenforce key concepts to establish a strong working foundation of how Custom Reporting works.



Why Custom Reporting

- *Can help you identify missing information*
 - *Identify cases that contain odd values or are missing values (missing roles or incident dates, misspelled values, etc.).*
- *Get specific information quickly*
- *Create and save reports that you run frequently*

Custom Reports

Be Aware!



Custom Reports are Not Access Restriction Aware



Access to Batch Changes

Accessing Custom Reporting Screen

Custom Analytics

[Build a new custom analytic](#)

My saved reports:

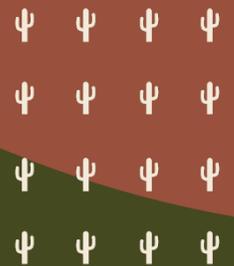
4 - Adv. Reports - Two Alcohol Charges ▼

[Run this saved custom analytic](#) [Delete it](#)



Custom Reporting Screen: 5 Sections

SELECT: the fields you wish to review: These are your fields within
Maxient



WHERE: The field where you tell the system how to filter your results

GROUP BY: Used when providing you with counts of variables

HAVING: Using in conjunction with GROUP BY

ORDER BY: Allows you to determine how you want your results
sorted when displayed

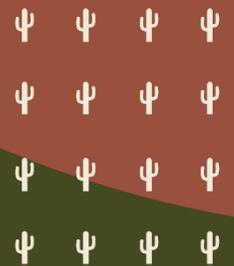


Creating Reports

Speak it BEFORE you create it



WHERE STATEMENT STRUCTURE



(TYPE = 'Conduct' OR TYPE = 'Info Only') AND STATUS = 'Open'

VS

TYPE = 'Conduct' OR TYPE = 'Info Only' AND STATUS = 'Open'

WHERE STATEMENT GENERATOR

Use the fields below to assist in building the *WHERE* statement. Start by selecting a field from the "Case field" menu, then select the condition to be used for comparison. Finally, enter or select the value for the comparison. The statement will be added to the *WHERE* field upon clicking the "Add to WHERE" button.

[Show additional instructions](#)

Case field	Condition	Value
<input type="text" value="CLASSIFICATION"/>	<input type="text" value="is"/>	<input type="text" value="FRESHMAN"/>
<input type="button" value="Add to WHERE"/> <input type="button" value="Add AND"/> <input type="button" value="Add OR"/>		

```
1 CLASSIFICATION = 'FRESHMAN'
```

Report 1

*Create a report that will pull all cases
between August 1, 2021 and Today*



*INCIDENT_DATE BETWEEN '2021-08-01' AND
'2024-06-26'*

Report 2

Create a report that will pull all cases involving a Freshman between August 1, 2021 and Today*



**Use term(s) from your system*

*(CLASSIFICATION = 'Freshman') AND
(INCIDENT_DATE BETWEEN '2021-08-01' AND
'2024-06-26')*

Report 3

*Create a report that will pull all cases where an individual was charged with "Alcohol - Possession"**



**Use term(s) from your system*

{CHARGE EQUALS Alcohol - Possession}

Report 4

*Create a report that will pull all cases where
an individual was found responsible for
"Alcohol - Possession"**



**Use term(s) from your system*

*{CHARGE EQUALS Alcohol - Possession AND
FINDING EQUALS Responsible}*

Report 5

*Create a report that will pull all cases where an individual was found responsible for a charge containing the term " Alcohol " **



**Use term(s) from your system*

{CHARGE LIKE Alcohol AND FINDING EQUALS Responsible}

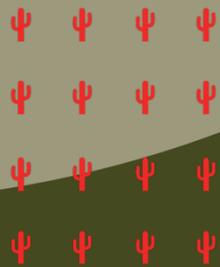
Report 6

You have a community service opportunity you want to email out to all students who have an outstanding Community Service sanction. Build a report that pulls those students' email addresses.

*COMMUNITY_SERVICE = 'Yes' AND
COMMUNITY_SERVICE_SANCTION_COMPLETED =
'No'*

Batch Changes

You want to change all Warning Sanctions to completed...



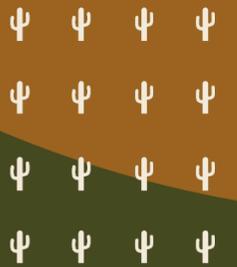
You could make this change case by case....or....you can use Batch Changes!

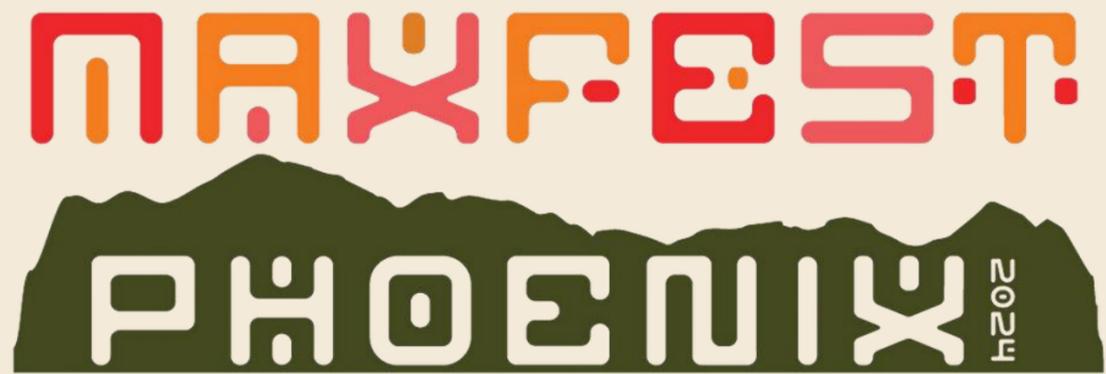


Questions?



Thank You!





A Lesson in Deleting, Not Leaving

Your Records Retention Policy



Trisha Hetue

Senior Client Support Specialist

Maxient's Role



- What Maxient needs to help you remove records

Your Role



- What you need to do to prepare to remove records

Learning Objectives



Common Policies



Based on Last Incident Date

Remove all cases of an individual where their last case was 7 or more years ago

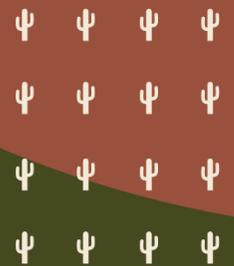


Based on Graduation/Last Date of Attendance

Remove all cases of an individual where it has been more than 7 years since they graduated or last attended the institution

Other Considerations

- Case Types – Remove all case types or just specific ones?
- Permanent Records – How are they defined? Specific Sanctions? Tags?
- Statuses -- Exclude Cases with specific statuses?
- Incomplete Sanctions – Exclude cases with Incomplete Sanctions?





What does the process look like?



Based on Last Incident Date



Report will be coded for cases 7 years ago or earlier

You can run the report at your leisure and results will always include cases 7 years ago or earlier from the date you run the report



Export your report to Excel or CSV

Review cases on the spreadsheet and remove any you wish to keep.



Return List to Maxient

Return a spreadsheet to Maxient support with the File ID numbers you wish to remove



Graduation Date or Last Date of Attendance



Provide Registrar with list of ALL people in who have files in Maxient

Since cases do not reflect the graduation date or last date of attendance, your registrar will need to help



Registrar returns ONLY names/SIDs of individuals affected

If you're using 7 years post last attendance date, you will only provide those individuals who graduated or last attended 7 or more years ago



Return List to Maxient

Provide list to Maxient and we'll plug it into the report. This process will need to occur every year (or each time you want to remove records)



Case Removal Process

POLICY

Do You know what it is or where to find it?

REPORT BUILT

Report is based on criteria you provide

EXPORT TO CSV

Omit files you want to keep from the list

SHARE

Open support ticket to get started

REVIEW

Update any cases with tags, dates, etc.

REMOVE FILES

System Log will reflect deleted cases

01

02

03

04

05

06



Example

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ψ ψ ψ ψ
ψ ψ ψ ψ

Report – Cases for Potential Removal

1200 - Cases for Potential Removal

LEGEND:

Report contains two tables found within respective tabs below. The first table, "Cases for Potential Removal", displays all cases where the individual's **last** incident occurred prior to and including **June 21, 2017**, and that individual was **never assigned** a sanction found in the set: 'University Suspension', 'Ban from Campus', 'Expulsion'. Cases without incident dates (e.g., blanks or "0000-00-00") are also displayed. **Please verify these cases without incident dates; they may be current cases.**

This table **does not** make use of access restrictions meaning that if a user is not a member of the group to which a case is restricted, that user **will be able to see** that case on this table when viewing it.

The second table on this report, "Cases with Separation Keywords in "Additional Sanctions/Stipulations" Field", displays cases where the case has keyword(s) from the set: 'suspension', 'suspended', 'expelled', 'expulsion', 'dismissed', 'dismissal' found in the "Additional Sanctions/Stipulations" field and where the related sanction has not been assigned on the case. This table is particularly important for any migrated Legacy Data where separation-related sanction(s) were not added to the case.

When you're ready to remove cases from the system (after reviewing the data in the second table), please export the report via the "CSV" or "Excel" buttons and delete from the file any cases you **do not** want removed. Return the spreadsheet to Maxient and Maxient will remove all of the cases on the spreadsheet. **Please be deliberate in your review.** Once the cases are removed from the system, they **cannot** be recovered.

Cases for Potential Removal

Cases with Separation Keywords in "Additional Sanctions/Stipulations" Field

DESCRIPTION:	Cases for Potential Removal
DATES:	<i>Appears to be ignored</i>
CASE TYPES:	<i>All</i>
HOME OFFICES:	<i>All</i>
RESULTS:	2389
RESTRICTIONS:	This report ignores case access restrictions.

Report - Cases for Potential Removal

Cases for Potential Removal

Cases with Separation Keywords in "Additional Sanctions/Stipulations" Field

DESCRIPTION: Cases for Potential Removal
DATES: *Appears to be ignored*
CASE TYPES: All
HOME OFFICES: All
RESULTS: 2389
RESTRICTIONS: This report ignores case access restrictions.

CSV

Excel

Filter Results

Column visibility ▾

Showing 1 to 2,389 of 2,389 entries

Search:

File ID	Case Type	Status	First Name	Last Name	SID	Incident Date	Reported Date	Case Created Date	Hearing Date
2013002201	Student Conduct	Closed			000987624	2011-08-15		2011-08-15	2011-08-31
2013002501	Student Conduct	Closed			000983181	2011-08-14		2011-08-15	2011-08-23
2013002601	Student Conduct	Closed			001024164	2011-08-15		2011-08-15	2011-08-25
2013002701	Student Conduct	Closed			000992351	2011-08-14		2011-08-15	2011-08-19
2013002801	Student Conduct	Closed			000905164	2011-08-14		2011-08-15	2011-08-24
2013002802	Student Conduct	Closed			000906600	2011-08-14		2011-08-15	2011-09-02
2013002803	Student Conduct	Closed			001021592	2011-08-14		2011-08-15	2011-08-30

Report – Cases for Potential Removal

Cases for Potential Removal

Cases with Separation Keywords in "Additional Sanctions/Stipulations" Field

DESCRIPTION: Cases with Separation Keywords in "Additional Sanctions/Stipulations" Field

DATES: *Appears to be ignored*

CASE TYPES: *Appears to be ignored*

HOME OFFICES: *Appears to be ignored*

RESULTS: 3

RESTRICTIONS: This report ignores case access restrictions.

NOTES: The table below ignores date ranges to show cases where the "Additional Sanctions/Stipulations" field on the case contains one of the words found in the following set: 'suspension', 'suspended', 'expelled', 'expulsion', 'dismissed', 'dismissal', and where the case **does not** have a sanction in the set: 'University Suspension', 'Ban from Campus', 'Expulsion' assigned.

This table is particularly important for legacy data where the respective separation sanction may not have been applied to the case and the case is considered part of the individual's permanent record. If the case should have the sanction applied, click the link to the File ID and add the appropriate sanction to the case. If any of these cases have had their sanctions updated to include a separation/permanent file-related sanction, please re-run the report to refresh the data.

This table **does not** make use of access restrictions, meaning that if a user is not a member of the group to which a case is restricted, that user **will see** that case on this table when viewing it.

CSV Excel Filter Results Column visibility

Showing 1 to 3 of 3 entries

Search:

File ID	Case Type	University Suspension	Ban from Campus	Expulsion	Additional Sanctions/Stipulations
2013002201	Student Conduct	No	No	No	_____ SANCTIONS _____ 1. Sanction: expulsion Sanction Date: 2011-08-31
2014041302	Academic Integrity	No	No	No	expulsion but not really.
2020001001	Student Conduct	No	No	No	In addition to the above sanction, I agree to complete the following:

Problems/Pitfalls



Many Blank Dates?

See analytic 912 – Cases with problematic dates



Legacy Data has permanent sanctions not reflected on case

Review second table on Cases for Potential Removal report and update cases as needed

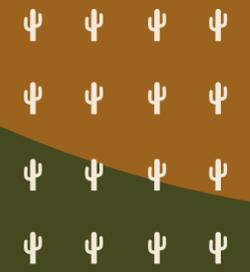


Other Issues

*Information only? Policy based on Hearing date?
Multiple retention schedules?*



Thank You!



**Please complete the evaluation for this program found in
Guidebook to help us plan for future MaxFests.**



Academic Processes in Maxient

Academic Integrity & Early Alerts



Miles Komuves
Director of Client Training



Michelle Ramirez
Client Support Specialist

Academic Integrity

- Who facilitates this on your campus?
- Workflow
- Configuration

Early Alerts

- Workflow
- Configuration

Academic Processes





Academic Integrity



Three Types of Processes

What do you use?



**Student
Conduct
Driven**



**Academic
Affairs/Faculty
Driven**



**Hybrid Model –
Faculty
Facilitated,
Conduct
Recorded**

Student Conduct Driven



Faculty report potential violations to Student Conduct



Student Conduct manages the process post report.



Faculty may participate in conduct meetings



Academic Affairs/Faculty Driven



At least one person in Academic Affairs is a Maxient user



Faculty members would submit the IR with all relevant information, these stay with Academic Affairs



Faculty and/or Academic Affairs will manage the case and document meetings/outcomes



Hybrid Model



Faculty members would submit the IR with all relevant information including outcome



Student Conduct receives report, creates case and immediately completes a CRF



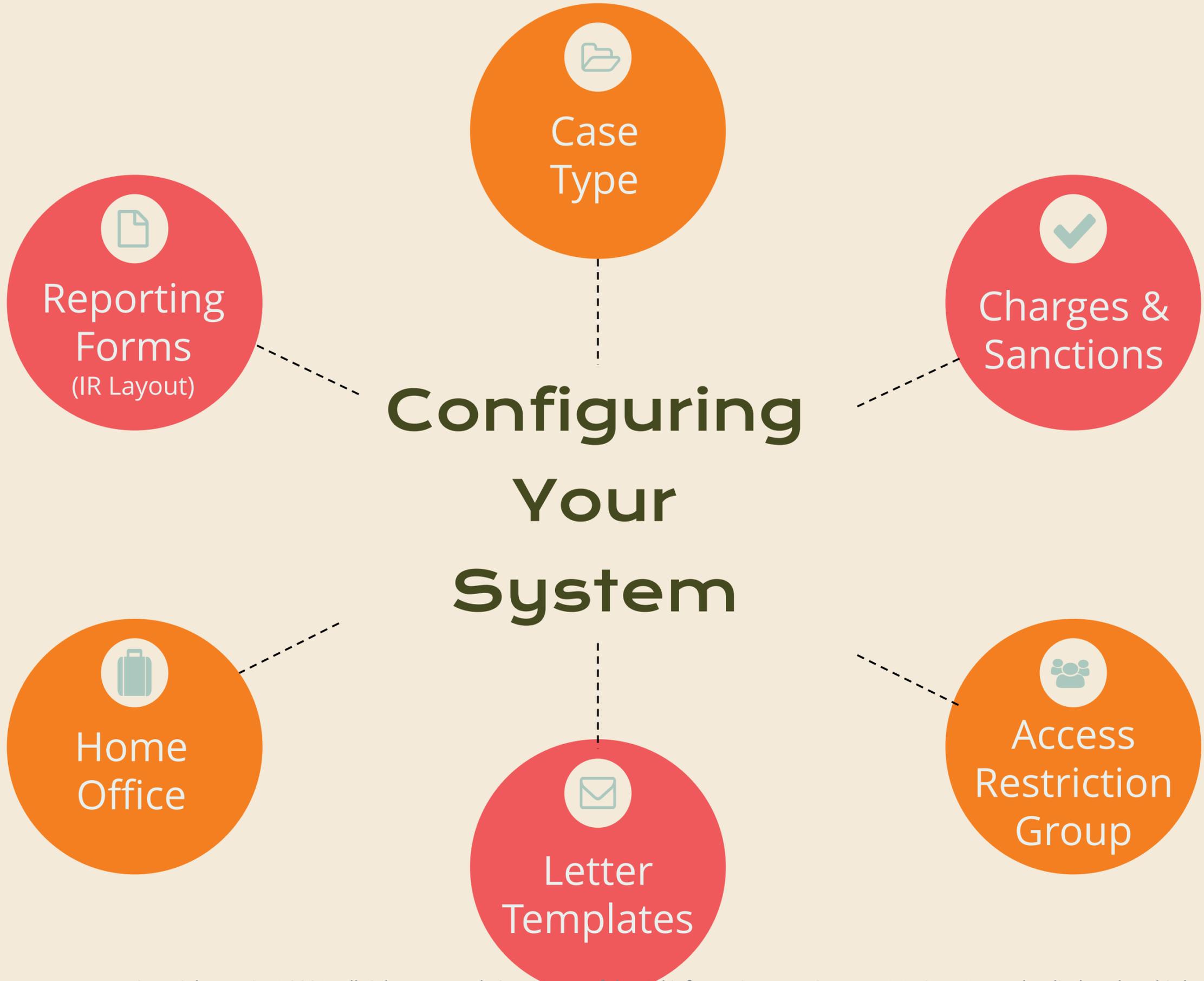
Faculty should consult with Student Conduct about a student's prior history





Configuring Your System for Academic Integrity





Configuring Your System


Reporting
Forms
(IR Layout)


Case
Type


Charges &
Sanctions


Home
Office


Letter
Templates


Access
Restriction
Group

Case Type

Add an “Academic Integrity” case type via **Manage Case Types**

Manage Case Types

Maxient now allows you to customize the screen appearance by case type (e.g., you cannot become favorite color), many fields can be relabeled to better reflect the case type, and some can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

Add a new case type

Go

New case type name

Academic Integrity

Charges

Added via “Manage Charges”:

- Category = “Academic Integrity”
- Follow the code!
- Add expanded language for letters

EDIT	CATEGORY	CHARGE TITLE	EX
Edit	Academic Integrity	Cheating	Ch
Edit	Academic Integrity	Facilitating academic dishonesty	Fa
Edit	Academic Integrity	Plagiarism	Pla
Edit	Academic Integrity	Unauthorized Cooperation	Un

CHARGE/ISSUE TITLE

This is the "short form", used in drop down menus and, optionally, in your letters. It should remain relatively constant from year to year for statistical reporting purposes.

Cheating

EXPANDED LANGUAGE

This "long form" is an opportunity to be more descriptive with your charges/issues (i.e. citing the Code). Most schools will use the expanded language in letters. It is ok for the charge title ("short form") and

act dishonestly or unfairly in order to gain an advantage, especially in a game or examination



Sanctions

- Requested via Manage Sanctions
- Category = "Academic"
- Add letter language & detail fields (ex. course name, number, etc.)

EDIT	CATEGORY	DESCRIPTIVE NAME	SANCTION
Edit	Academic	F in Course	FCOURSE
Edit	Academic	F on Assignment	FASSIGN
Edit	Academic	Grade Reduction	GRADEREDUCE
Edit	Academic	Academic Integrity Workshop	AIWKSHP



DESCRIPTIVE NAME

A brief description of this sanction. This will be used in dropdown menus, reports, and alert emails.

LETTER LANGUAGE

When this sanction is selected on a CRF, this language will be placed in the outcome letter.

Merge field dictionary

F in Course

You will receive a failing grade in {{FCOURSE_COURSE}} for the {{FCOURSE_TERM}} term.

Access Restriction Groups

- Added via “**Manage Groups**”
- Help create **privacy** for cases assigned to this group
- Can also add group “**access**” to specific items like Charges, Sanctions, etc.

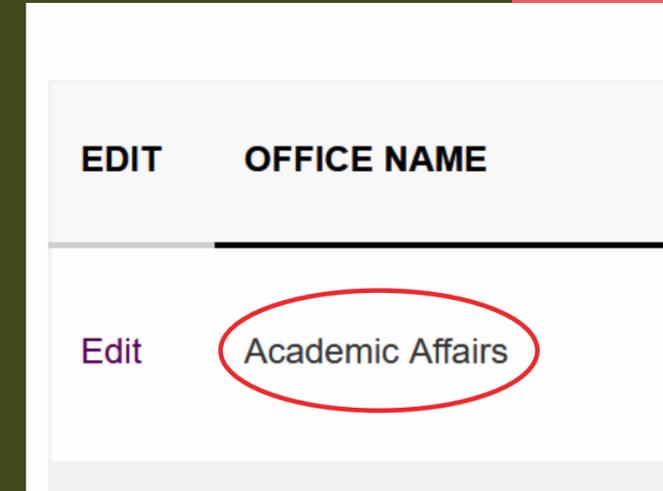
Case 2017006101 is access restricted.

For more information, please contact your system administrator.

EDIT	GROUP ID	NAME	DESCRIPTION	NUMBER OF MEMBERS
Edit	5	Academic Integrity	Academic Integrity cases	25

Home Office

- Added via “Manage Offices”
- Home Office = “Academic Affairs”
- Can control report filters via Analytics
- **Controls email language** when sending out letters



SUBJECT LINE FOR EMAILS TO CASE PARTIES

If no subject line is provided for this office, the default found on the Configuration screen will be used. **No HTML permitted.**

BODY TEXT FOR EMAILS TO CASE PARTIES

For emails sent using the Verified Delivery method, this text will form the content of the email and will be followed by a link to access the PDF letter from Maxient's secured servers. If no body text is provided for this office, the default found on the Configuration screen will be used.

Correspondence for Case ({{FIRST_NAME}} {{LAST_NAME}})

THIS IS AN OFFICIAL CORRESPONDENCE FROM THE ACADEMIC AFFAIRS OFFICE AT WOODROW COLLEGE

A letter has been issued to you electronically by our office. Upon clicking the link below, you will be taken to a screen displaying your name and requesting an access code to ensure confidentiality. Confirm that your name appears on the screen, and then enter your student ID number as the access code. If you are receiving this notice in your capacity as a leader of a campus organization, you should contact our office immediately to request the appropriate access code for your



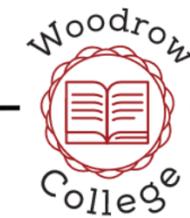
Letter Templates

- Create **correspondence** to send to students, faculty, or both!
 - You'll likely need notification of allegations and outcome letters for students
- **Memos** help to communicate with faculty without sending the letter to the student
 - Still saves a copy in EFC!



Letters

EDIT	CATEGORY	DISPLAY NAME
Edit	Academic Integrity	Academic Integrity - Memo to Faculty
Edit	Academic Integrity	Board Hearing Notice
Edit	Academic Integrity	Formal Hearing Outcome Letter
Edit	Academic Integrity	Informal Outcome Letter
Edit	Academic Integrity	Initial Meeting Letter



Sample Memo

PERSONAL AND CONFIDENTIAL

Regarding Case Number: 2022000301

DATE: June 8, 2023

STUDENT: Michael Scott

ID: 333333333

The purpose of this memorandum is to provide notification of the documented outcome for the above-named student.

- Cheating -- Responsible

As a result of those findings, the following sanctions have been imposed in accordance with the Code of Conduct:

- You will receive a failing grade in College 101 for the Spring 2023 term.

If you have any questions regarding the information contained within this memo, please contact me at afowler@maxient.edu.

Thank you for your partnership and support of the process at Woodrow College.

Reporting Forms

- Add and update via “**IR Layouts**” screen
- Tailor the IR layout to ask Academic Integrity-specific questions
- Try repurposing the “Incident Location” field to align with your academic colleges

The screenshot shows a web form for reporting an incident. On the left, there are input fields for 'College (Required):', 'Course number and section:', and a section titled 'Students Involved' with the instruction 'Please list all available information'. Below this is a table with a header 'First and Last Name'. On the right, a dropdown menu is open, displaying a list of departments. A red box highlights the dropdown menu with the text 'IR "Location" Dropdown Menu'. The departments listed are: College of Engineering, College of Liberal Arts, College of Science and Mathematics, The C. Montgomery Burns School of Business, College of Mass Communication, College of Hospitality, Retail, & Sport Management, Mr. Wizard's School of Education, School of Music, Law School, and The Patch Adams School of Medicine. A small 'ID' label is visible on the far right edge of the form.

College (Required):

Course number and section:

Students Involved

Please list all available information

First and Last Name

Please select a department...

IR "Location" Dropdown Menu

- College of Engineering
- College of Liberal Arts
- College of Science and Mathematics
- The C. Montgomery Burns School of Business
- College of Mass Communication
- College of Hospitality, Retail, & Sport Management
- Mr. Wizard's School of Education
- School of Music
- Law School
- The Patch Adams School of Medicine

ID

Important Considerations!

Based on your workflow, things to think about!

Student Conduct Facilitated

- Is your IR Layout customized for Faculty?
- How are you sharing information about outcomes to Academic Affairs/Faculty?

Academic Affairs Facilitated

- Who will be the Maxient users?
- Will an access restriction group need to be created?
 - If so, what users will be included?

Faculty Facilitated, Conduct Recorded

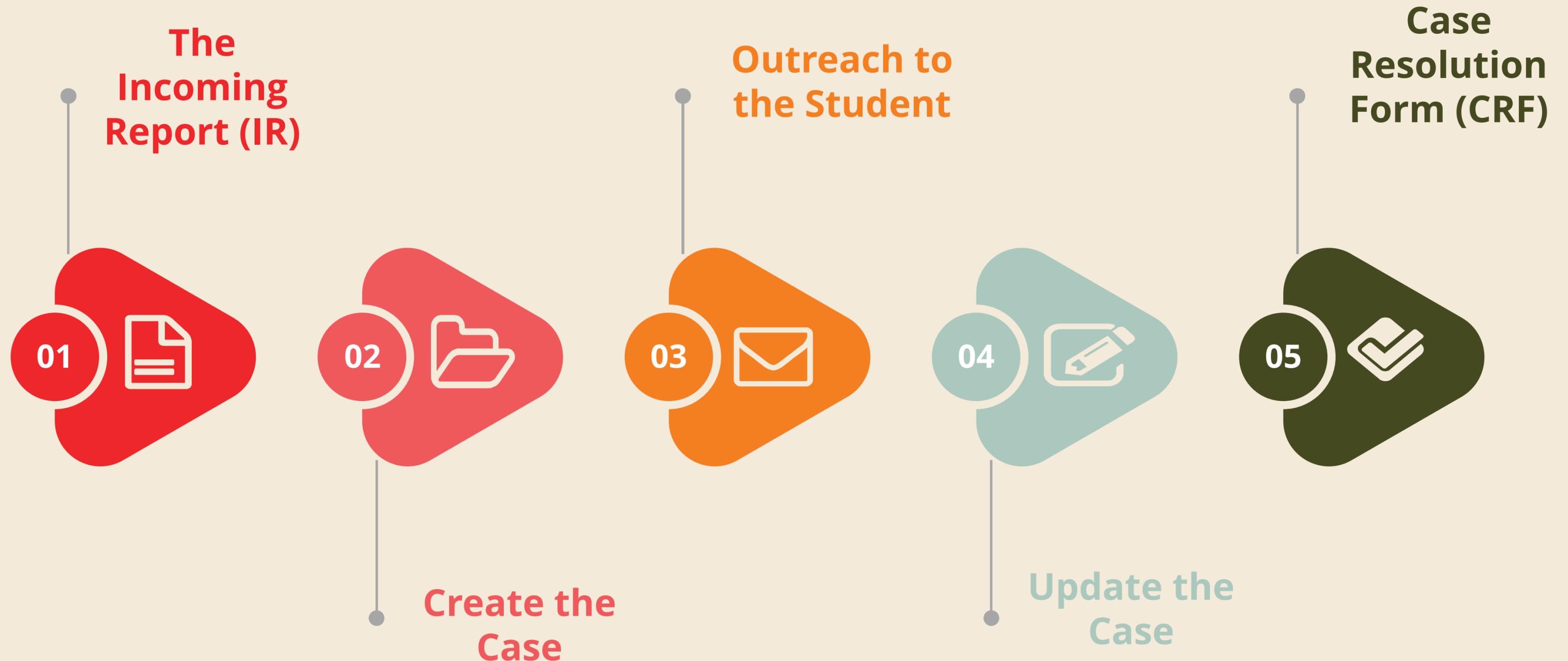
- How will faculty know if a student has prior history?
 - *What if they 'resolve' the case before consulting on history?*
- Will correspondence be sent through Maxient?



Early Alerts



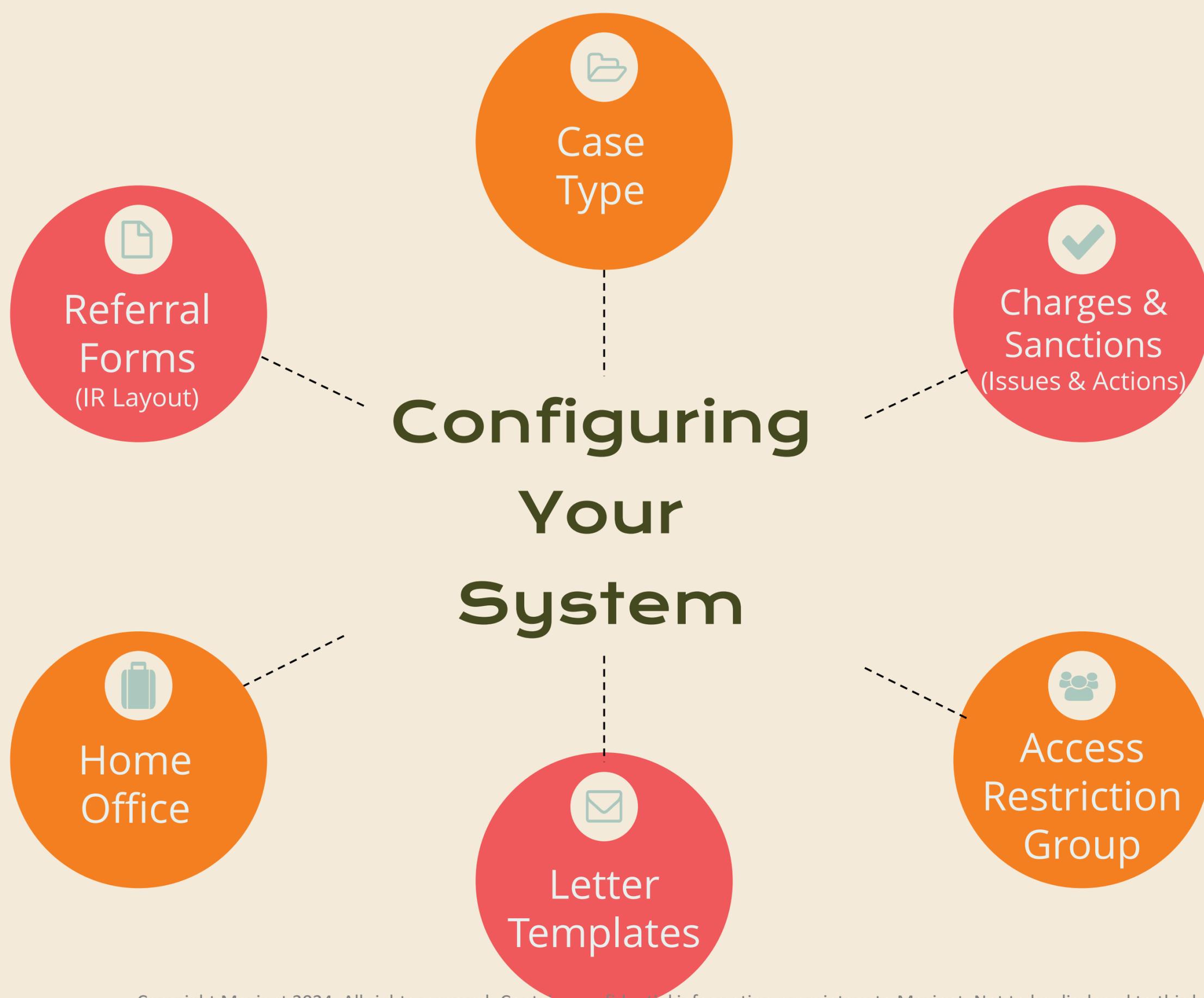
Early Alert Workflow





Configuring Your System for Early Alerts





Case Type

Add an "Early Alert" case type via **Manage Case Types**

Manage Case Types

Maxient now allows you to customize the screen appearance by case type (not all fields can become favorite color), many fields can be relabeled to better reflect the case type, and some fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

Add a new case type

Go

New case type name

Early Alerts



Charges/Issues

Added via “**Manage Charges**”:

- Charges/Issues should reflect the reason a student was referred i.e Regular Tardiness, Missing Assignments
- Can pull analytic reports to track notable trends

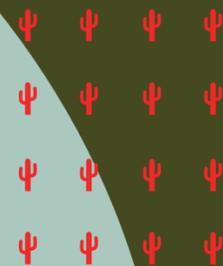


EDIT	CATEGORY	CHARGE TITLE
Edit	Early Alert - Academic Progress	Evidence of weak study skills
Edit	Early Alert - Academic Progress	Inadequate/ underdeveloped foundational academic skills
Edit	Early Alert - Academic Progress	Missing or incomplete homework/assignments

Sanctions/Actions

- Reflect referrals or interventions provided to students
- Consider adding letter language to send to students and/or faculty that describe the referral or intervention that was provided
- Submit **request** to Maxient staff via **Manage Sanctions** tab

EDIT	CATEGORY	DESCRIPTIVE NAME	SANCTION
Edit	Early Alert	Advisor Referral	REFER_ADVISOR
Edit	Early Alert	Provided Resources	PROVIDE_RESOURCE
Edit	Early Alert	Referral	REFER_GENERAL



DESCRIPTIVE NAME

A brief description of this sanction. This will be used in dropdown menus, reports, and alert emails.

LETTER LANGUAGE

When this sanction is selected on a CRF, this language will be placed in the outcome letter.

[Merge field dictionary](#)

Referral

You are being referred to {{REFER_GENERAL_TO_WHOM}} for {{REFER_GENERAL_REASON}}. Your first meeting should take place by {{REFER_GENERAL_MEETING_DUE}}.

Access Restriction Groups

Will it be important to your institution to restrict these cases to specific users?

Case 2017006101 is access restricted.

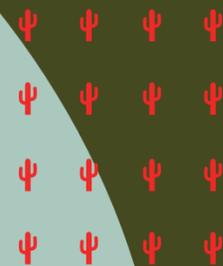
For more information, please contact your system administrator.

EDIT	GROUP ID	NAME	DESCRIPTION	NUMBER OF MEMBERS
Edit	27	Early Alert	Academic Early Alert Cases	6



Home Office

- Added via “Manage Offices”
- Home Office = “Early Alert”
- Can control report filters via Analytics
- **Controls email language** when sending out letters



SUBJECT LINE FOR EMAILS TO CASE PARTIES

If no subject line is provided for this office, the default found on the Configuration screen will be used. **No HTML permitted.**

BODY TEXT FOR EMAILS TO CASE PARTIES

For emails sent using the Verified Delivery method, this text will form the content of the email and will be followed by a link to access the PDF letter from Maxient's secured servers. If no body text is provided for this office, the default found on the Configuration screen will be used.

{{FIRST_NAME}}, We're here to help ({{FIRST_NAME}}) ({{LAST_NAME}})

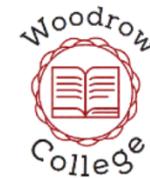
At Woodrow College, we are committed to your success and to supporting you when you have academic struggles.

For more questions, go here! Resources and Support

A letter has been issued to you electronically by our office. Upon clicking link below, you will be taken to a screen displaying your name and request an access code to ensure confidentiality. Confirm that your name appears on the screen, and then enter your student ID number as the access code.

Letter Templates

- Create **correspondence** to send:
 - Initial outreach to a student
 - Closure/referral letter to a student
 - Memo to the instructor documenting your follow up
- **Memos** help to communicate with faculty without sending the letter to the student but still saves a copy in the EFC



PERSONAL AND CONFIDENTIAL

Regarding Case Number: 2021000901

Dear Phyllis:

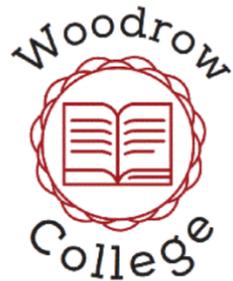
Our office has received notice of an Early Alert concern. This issue was brought to our attention by Dr. History, who indicated you may be experiencing difficulties with:

- Poor Time Management
- Missing Homework/Assignments

Your Academic Coach met with you on June 10, 2024 about this concern and offered the following support:

Referral Forms

- Add and update via “**IR Layouts**” screen
- Consider the **ease of use** for faculty when creating this IR
- Add a question with checkboxes that mirror the specific academic issues in your system



Early Alert Form

This form must be completed and submitted when a student demonstrates at-risk behavior. If your concern requires immediate attention, please contact Campus Safety.

This form is not a crisis response notification. If a student has made threats of harm to self or others, contact emergency personnel immediately and notify Campus Safety at either 434-555-1212 or 911.

Faculty/Instructor Information

Faculty/Instructor Name:

Date of Report (Required): 

Campus/Center (Required):

Concerns

Please check all that apply:

Attendance Concern

- Excessive/Unexplained absenteeism
- Regular tardiness
- Frequently leaves class early
- Failure to report to work study
- Missing practice, student activities, or other responsibilities
- Has not accessed online class

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Important Considerations



No matter how you receive information, Maxient can accommodate recording it!



Updating cases is a common and cyclical process – record your work there!



There's always a point where you'll want to record the decisions you've made and the support you provided to the student.
Use the **CRF!**

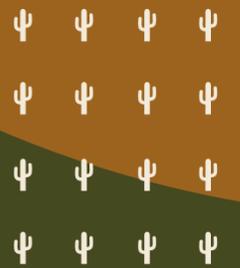




Questions?



Thank You!



Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests!



Accommodations and Disability Services



Turi Watson
Client Success Advisor

Some Considerations

- The use of Maxient for Disability Services or Accommodations is what we would consider to be an “off-label” use.
- Maxient wasn’t designed for this purpose, but the existing screens and workflow can accommodate this process when customized with appropriate options.
- For our screen shots, please engage in a willing suspension of disbelief and consider an academic term to be just a few weeks long.

Recommendations

- Create at least one IR for Accommodations Request
- Update Configuration Screen and Manage Case Types
- Create Concerns to be tracked
- Request Accommodations to be tracked
- Create Letters
 - Request received – detail next steps and timeline
 - Request received – need documentation
 - Request approved
 - Request denied

> IR Layouts
and
Configuration
Screen
Changes



IR Layouts

- Woodrow College – Accommodations Request
- https://cm.maxient.com/reportingform.php?WoodrowCollege&layout_id=32
- Aurora University – Accommodations Renewal Request
- https://cm.maxient.com/reportingform.php?AuroraUniv&layout_id=51
- Howard College – Accessibility/Accommodations
- https://cm.maxient.com/reportingform.php?HowardCollege&layout_id=5



Configuration Screen Changes

- **CC Recipients** (Optional) - Depending on how many people may receive accommodations letters - you may opt to add CC recipients to each letter using the "Other: Specify Below" option instead of updating this field and maintaining changes as necessary
- **CC Recipients – Letters/Memo Distribution Method** (Recommended) – Allows you to track when CC recipients have viewed the letter (displayed in Analytic 72: CC Recipients on Letters).

Configuration Screen Changes

- **Hearing Officer Titles** (Recommended) - Will new users be managing the files in Maxient? They'll need a Hearing Officer Title.
- **Statuses** (Recommended) - Consider your process - Open and Closed may be sufficient, but if you want to track whether those accommodations are being reviewed or monitored, you may want to create others (Under Review, Active, Awaiting Recertification, etc.)

Manage Case Types

- Manage Case Types allows you to customize Maxient for your specific case type.
- Available to Level 5 users under Administrative functions
- Permits you to rename key elements, limit options for specific fields, and hide/repurpose other fields to simplify screens



Manage Case Types

- Terminology Tab

Manage Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

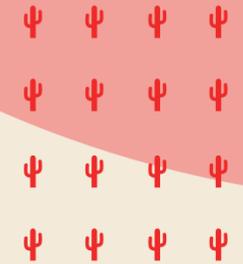
Select a case type to view or begin a new one below

Go

Disability Services

Values highlighted in green indicate they have been modified from the default values.

Standard Terminology	Customized Name
Charge <small>30 character limit</small>	Concerns
Finding <small>30 character limit</small>	Decision
Hearing Officer <small>30 character limit</small>	Administrator
Incident <small>30 character limit</small>	Request
Sanction <small>30 character limit</small>	Accommodations



Manage Case Types

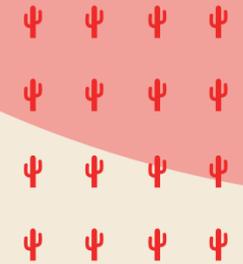
- Lists Tab

Disability Services

Values highlighted in green indicate they have been modified from the default values.

Terminology **Lists** Fields to Hide or Repurpose

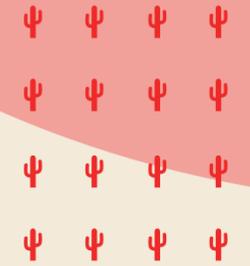
Item	Available Options
Appeal Statuses <i>20 character limit per option</i>	No appeal filed; Appeal received; Appeal in process; Approved; Denied
Classifications <i>30 character limit per option</i>	Freshman; Sophomore; Junior; Senior; Graduate; Not Enrolled; Faculty; Staff
Deadline Offset Default <i>Specify the number of days</i>	14
Findings <i>30 character limit per option</i>	Short-Term; Long-Term; Denied



Manage Case Types

- Lists Tab

<p>Incident Locations <i>100 character limit per option</i></p>	<p>N/A</p>
<p>Milestones <i>255 character limit per option</i></p>	<p>Request Received; Request Approved; Request Denied; Renewal Received; Renewal Approved; Excused Absence; Extended Time for Assignment; Assignment/Lab Make-up; Rescheduled Exam; Reduced Workload; Remote Work Environment</p>
<p>Note Categories <i>100 character limit per option</i></p>	<p>Accommodations not provided; Communication; General Information; Meeting; Other Contact; Referral; Pregnancy Accommodation Requested;</p>



Manage Case Types

- Lists Tab

<p>Referral Sources <i>50 character limit per option</i></p>	<p>Parent/Guardian; Student</p>
<p>Resolution Types <i>50 character limit per option</i></p>	<p>Disability Services Meeting; Disability Services Review Only</p>
<p>Roles <i>30 character limit per option</i></p>	<p>Requester</p>
<p>Tags <i>100 character limit per option</i></p>	<p>Spring 2023; Summer 2023; Fall 2023; Spring 2024; Summer 2024</p>



Manage Case Types

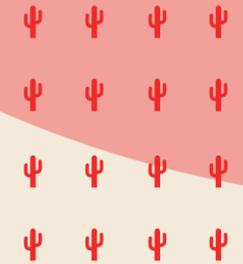
- Fields to Hide or Repurpose Tab

Disability Services

Values **highlighted in green** indicate they have been modified from the default values.

Terminology Lists **Fields to Hide or Repurpose**

Maxient Variable	Field	Customized Name	Visibility
ACADEMIC_ADVISOR	Academic Advisor	Academic Advisor	<input type="checkbox"/> Hide
ACADEMIC_MAJOR	Academic Major	Academic Major	<input type="checkbox"/> Hide
MEM_ATHLETICS_SPORT	Athletic Affiliation	Athletic Affl.	<input checked="" type="checkbox"/> Hidden
CLERY_RATIONALE	Clery Rationale	Clery Rationale	<input checked="" type="checkbox"/> Hidden
CLERY_REPORTABILITY	Clery Reportability	Clery Reportability	<input checked="" type="checkbox"/> Hidden
GPA_CUME	GPA Cumulative (at case creation)	GPA Cumulative (at case creation)	<input checked="" type="checkbox"/> Hidden
GPA_LAST_TERM	GPA Previous Term (before case)	GPA Previous Term (before case)	<input checked="" type="checkbox"/> Hidden
MEM_GREEK_ORG	Greek Affiliation	Greek Affl.	<input checked="" type="checkbox"/> Hidden





Letter

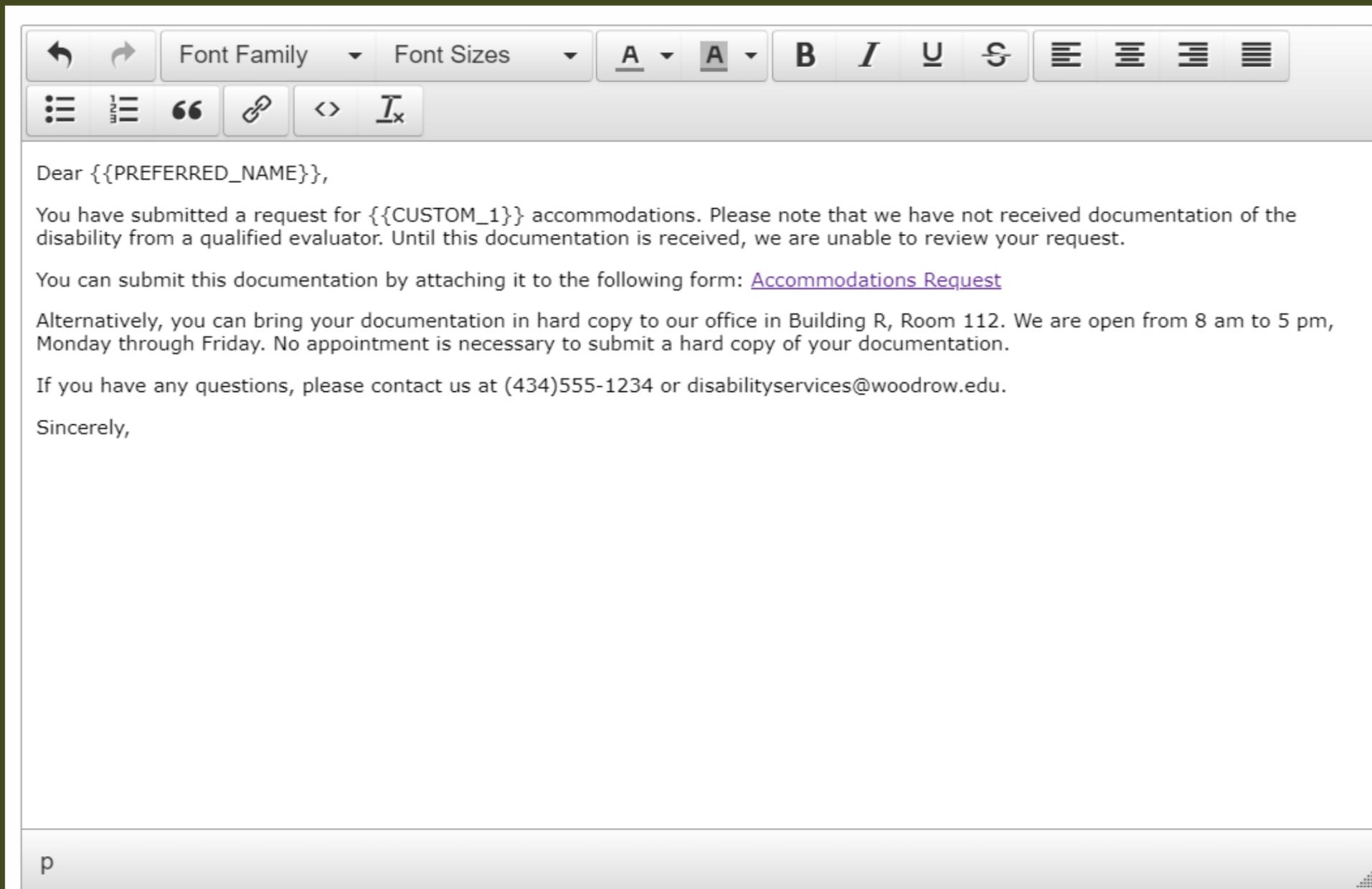
T e m p l a t e s

a n d

C o m m u n i c a t i o n



Documentation Request



The screenshot shows an email client window with a standard toolbar at the top. The toolbar includes icons for undo, redo, font family, font size, text color, background color, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, and outdent. Below the toolbar, the email content is displayed. The message begins with a salutation, followed by a paragraph explaining that the request for accommodations cannot be reviewed until documentation is received. It then provides two options for submitting documentation: online via a link and in person at a specific office location. The message concludes with contact information and a sign-off. The status bar at the bottom of the window shows a single paragraph (p) and a small icon in the bottom right corner.

Dear {{PREFERRED_NAME}},

You have submitted a request for {{CUSTOM_1}} accommodations. Please note that we have not received documentation of the disability from a qualified evaluator. Until this documentation is received, we are unable to review your request.

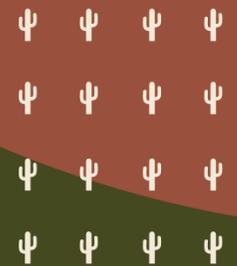
You can submit this documentation by attaching it to the following form: [Accommodations Request](#)

Alternatively, you can bring your documentation in hard copy to our office in Building R, Room 112. We are open from 8 am to 5 pm, Monday through Friday. No appointment is necessary to submit a hard copy of your documentation.

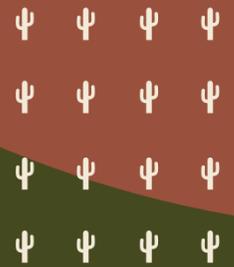
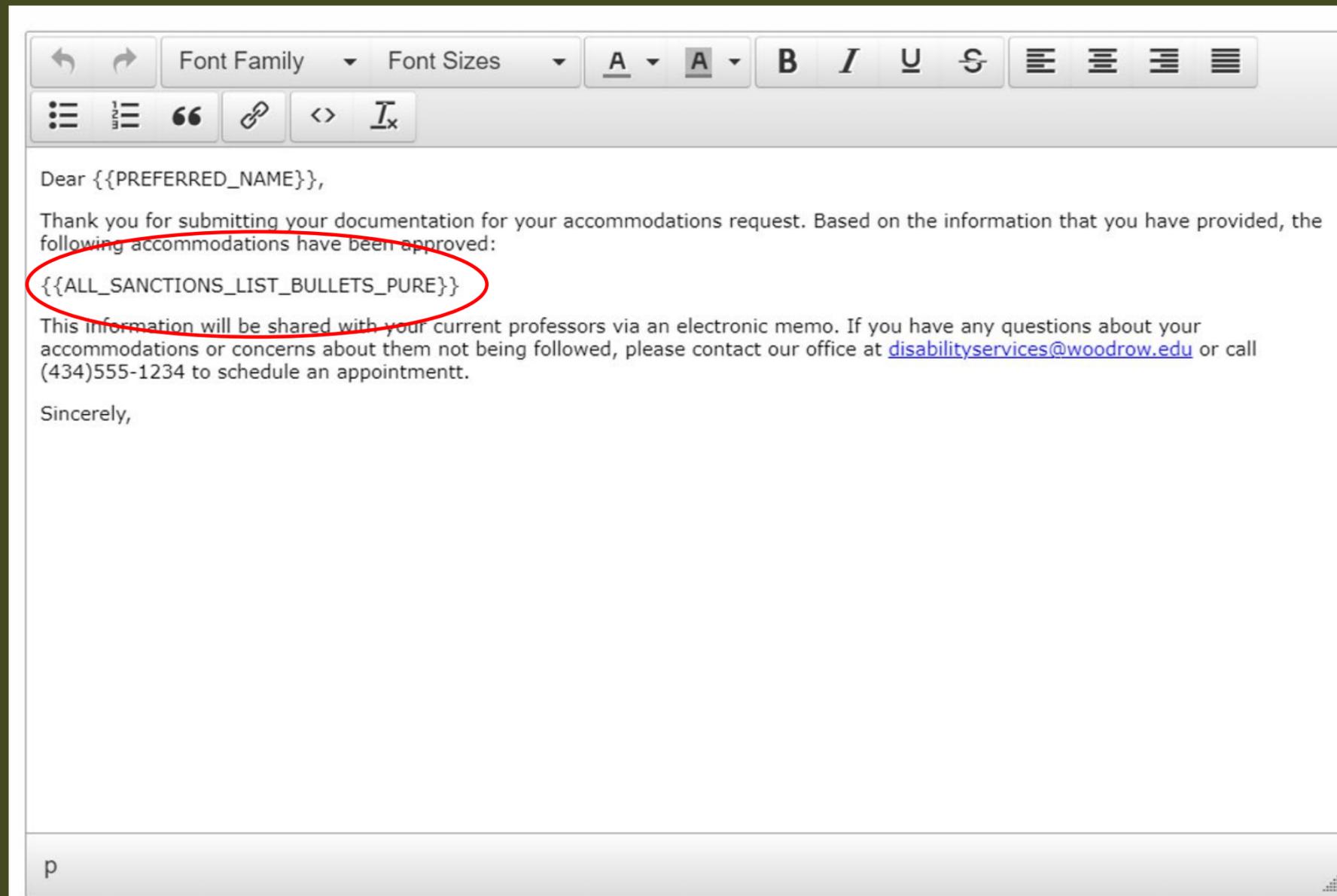
If you have any questions, please contact us at (434)555-1234 or disabilityservices@woodrow.edu.

Sincerely,

p



Accommodations Granted



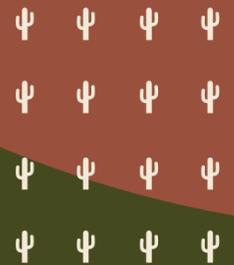
Home Office

BODY TEXT OF EMAIL TO MEMO RECIPIENTS

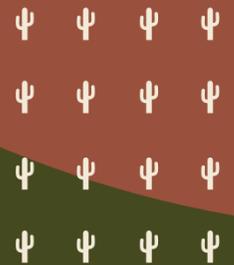
This text will form the content of the email to any recipients when sending a letter as a memo. Like emails to case parties, this will be followed by the email signature of the sender and accompanied by a PDF version of the memo.

{{FIRST_NAME}} {{LAST_NAME}} is enrolled in one of your courses this term. This student is qualified under the Americans with Disabilities Act and has been approved to receive academic accommodations. Please review the attached Academic Access Letter for details. If you encounter difficulty opening this attachment, please contact the Office of Disability Services at 434-555-1214 .

Every term, for each student that has requested and been approved for accommodations, our office will send out approved Academic Access Letters, copying the student and professor on that email. If you have any questions please feel free to respond to this email or contact me at tmorrison@maxient.com or accessibility@maxient.com, and please respect the student's right to confidentiality in not disclosing the above information. Thank you for assisting us in providing equal access and opportunity for all students.



Home Office Language Review



Options Letterhead/Margins Recipient's email **CC/Memo recipients' email**

From:
Toni Morrison <twatson@maxient.com>

Subject:
Message from Woodrow College Office of Disability Services

Memo email body text:

Angela Martin is enrolled in one of your courses this term. This student is qualified under the Americans with Disabilities Act and has been approved to receive academic accommodations. Please review the attached Academic Access Letter for details. If you encounter difficulty opening this attachment, please contact the Office of Disability Services at 434-555-1214 .

Every term, for each student that has requested and been approved for accommodations, our office will send out approved Academic Access Letters, copying the student and professor on that email. If you have any questions please feel free to respond to this email or contact me at tmorrison@maxient.com or accessibility@maxient.com, and please respect the student's right to confidentiality in not disclosing the above information. Thank you for assisting us in providing equal access and opportunity for all students.

Letter Notes:

- User of _PURE sanction-related merge fields will prevent the inclusion of any pre or post language typically associated with sanctions
 - Review Merge Language fields on the Configuration screen
- Memo to Instructor attached to EFC, not sent to the student
 - Alternate Option – copy all instructors on letter to student regarding accommodations**
 - Alternate Option 2 – send letter to student with expectation they share it with instructors



Letter Notes:

- User of _PURE sanction-related merge fields will prevent the inclusion of any pre or post language typically associated with sanctions
 - Review Merge Language fields on the Configuration screen
- Memo to Instructor attached to EFC, not sent to the student
 - Alternate Option – copy all instructors on letter to student regarding accommodations - (Remember, Analytic 72!)
 - Alternate Option 2 – send letter to student with expectation they share it with instructors



> Issues and
Actions ...

The Ability to
Rename Them !



Issues

Examples

These would need to be adjusted to fit your process.

They are added via the Manage Charges screen



Edit	Accessibility	Blind	Blind
Edit	Accessibility	Central Auditory Processing Disorder	Central Auditory Processing Disorder
Edit	Accessibility	Deaf	Deaf
Edit	Accessibility	Emotionally Impaired	Emotionally Impaired
Edit	Accessibility	Hearing Impaired	Hearing Impaired
Edit	Accessibility	Learning Disability - Math	Learning Disability - Math
Edit	Accessibility	Learning Disability - Non-Verbal	Learning Disability - Non-Verbal
Edit	Accessibility	Learning Disability - Reading	Learning Disability - Reading
Edit	Accessibility	Learning Disability - Written Expression	Learning Disability - Written Expression
Edit	Accessibility	Medical: Temporary	Medical: Temporary
Edit	Accessibility	Physically Impaired	Physically Impaired

Issues

R e n a m e d

Remember that Level 5 users can now rename the Charges/Issues fields via the Manage Case Types and it will impact the Update Existing Case screen.



Update Existing Case

2022001201 Angela Noelle Martin (987654009)

CASE DEMOGRAPHICS CONTACT REQUEST EFC ASSIGNMENT RESOLUTION ACTIONS TASKS NOTES OTHER ADMINISTRATIVE

Resolution Date: 2023-04-08
Resolution Type: Disability Services Review Only

Note: Manually entering a date here will cause the system to believe a CRF is on file.

Administrator 1: Assoc. Dean of Students
Administrator Name 1: Toni Morrison

Administrator 2:
Administrator Name 2:
Administrator 3:
Administrator Name 3:
Concerns 1: Pregnancy Accommodations Request
Concerns 2:
Concerns 3:
Finding: Approved - Temporary
Finding:
Finding:

Actions

Examples

These are requested by Level 5 users and built by Maxient staff.

They should reflect the accommodations that you can provide for individuals and contain details fields that change person to person.



Edit	Accommodations	Assignment Deadlines
Edit	Accommodations	Assignment Delay + 7
Edit	Accommodations	Audio Books
Edit	Accommodations	Classroom Location Move
Edit	Accommodations	Closed Caption
Edit	Accommodations	Preferred Seating
Edit	Accommodations	Record Class
Edit	Accommodations	Service Animal
Edit	Accommodations	Test Scribe
Edit	Accommodations	Use of Calculator
Edit	Accommodations	Visual Contact
Edit	Accommodations	Assistance Animal
Edit	Accommodations	Extended Test Time
Edit	Accommodations	Proofreader
Edit	Accommodations	Note Takers

Actions

Renamed

This is how they will appear once applied by completing a CRF (Case Resolution Form).



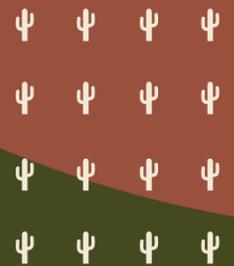
Update Existing Case

CASE	DEMOGRAPHICS	CONTACT	REQUEST	EFC	ASSIGNMENT	RESOLUTION	ACTIONS
Accommodations							
Assignment Deadlines		Completed?		Details			
		<input type="radio"/> Yes					
		<input checked="" type="radio"/> No					
		<input type="radio"/> Referred					
Assignment Delay + 7							
		<input type="radio"/> Yes					
		<input checked="" type="radio"/> No					
		<input type="radio"/> Referred					
Preferred Seating							
		<input type="radio"/> Yes					
		<input checked="" type="radio"/> No					
		<input type="radio"/> Referred					

Issues and Actions

C o n s i d e r a t i o n s

- Use Category and Section options to make granting access to your ADA group easier
- Issues don't typically require Expanded Language as it would be unusual to include them in a letter
- Consider the use of Auto Mark Completed option for Actions





Workflow

Recommendations



Workflow Difference

- When managing a Disability Services process, you will create a case based on the first IR submitted to request accommodations.
- Subsequent renewal requests will be submitted via your designated form, BUT....

You will use the option to Add Person to Existing Case to create a new file within the existing case



Benefits

Adding the same individual to the same case repeatedly has

Many benefits for this particular workflow:

Multiple Files
for one
person/per
term in one
case...like old
accordian file

Find People
and Timeline
accurately
indicate
services and
support

Permits
sharing of EFC
and notes- use
Shared notes
option from
first case

Permits for
more
accurate
analytics on a
per term
basis

Initial Case Creation

- Create as you typically would
- Gather documentation and add to EFC
 - Can create a folder for the initial term of request
- Complete Case Resolution Form to grant accommodations



Case Resolution Form

- Create as you typically would
- Gather documentation and add to EFC
 - Can create a folder for the initial term of request
- Complete Case Resolution Form to grant accommodations



CRF



Case Resolution Form

2022001202

Name	SID	DOB	Role
Angela Noelle Martin	987654009	2005-11-03	Requester

I. Resolution Information

Resolution Type	Resolution Date	Administrator(s)
Disability Services Review Only	2024-06-14	Assoc. Dean of Students (Toni Morrison)

Parental/Guardian Notification
No

II. Concerns and Decision

1. Attention Deficit Disorder (ADD) Long-Term

III. Accommodations

- Student is having some health issues that are requiring further workup and specialist evaluation. They will need some accommodations for assignment deadlines and testing until their medical situation stabilizes.
- If a medical event occurs, Student may take up to one week to complete assignments and tests. They should communicate with you and/or my office as soon as possible to notify us that a medical event has occurred.
- Extended Test Time one and half time

Complete Required
fields, indicating
decision, and
adding
accommodations

CRF



Complete Required
fields, indicating
decision, and
adding
accommodations

Finalize Save in progress

FINALIZE

Has this case been resolved?

Yes. Outcomes here will be counted toward analytics, sanction alerts will be sent, and this data will be available to letter merge fields.

No. We'll put a copy of this in the EFC, but the case effectively remains unheard and a new CRF can be started at any time.

Keep this case assigned as-is, or move it to someone else?

No change (Toni Morrison, Assoc. Dean of Students) ▼

Add/remove tags

Click to add/remove tags ...

Update the case status

Open ▼

Set the next deadline date

2024-08-01

Next deadline reason

Review documentation for next term

Send a ping, if needed

Click to select pings ...

Next Steps

Send Communications

- Letter to Requester
- Memo/copies to instructor/supervisor confirming accommodations



Case will appear on Overdue Cases tab at Deadline Date

- Send letter to student indicating they should submit renewal
 - OR –
- Initiate renewal automatically

> Adding Person to Existing Case

This is the
critical step !!



Renewal Process

Add people to an existing case

If a case has already been opened (*i.e.* 20180123) and you're simply adding additional people to it (-01, -02, *etc.*), you'll want to begin here.

Enter the existing case number:

(first 8 digits only)

Enter the unique SID for each new person (one per line):

 *No commas or semi-colons, please.*

Get started



Add Person to Existing Case

Create New Case

Incident Information

Type Required

Disability Services

Access Restriction

Disability Services

Referral Source Required

Student

Reported By

Reporter's Email Address

Incident Date

2022-06-09

Incident Time

Reported Date

2022-06-09

Incident Location

student

Specific Location

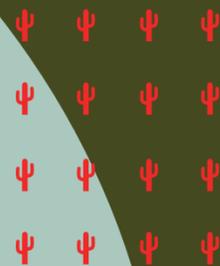
2021-2022



Update Incident and Reported Dates

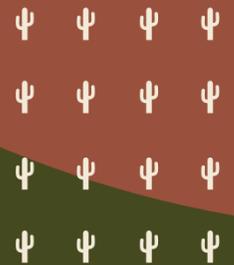
CASE	DEMOGRAPHICS	CONTACT	INCIDENT	EFC	ASSIGNMENT
Case Created Date					
2022-06-23					
Referred By					
Student					
Incident Date			Incident Time		
2022-06-09					
Incident Location					
student					
Reported Date					
2022-06-09					

CASE	DEMOGRAPHICS	CONTACT	INCIDENT	EFC	ASSIGNMENT	RESO
Case Created Date						
2023-04-08						
Referred By						
Student						
Incident Date			Incident Time			
2023-04-08						
Incident Location						
Engineering						
Reported Date						
2023-04-08						



Why Update the Date Fields?

- Will aid in running analytics to allow you to include relevant file for the individual term
- Impacts how information from renewals appear in Timeline
- Permits Prior History to truly represent when, how often and what type of accommodations have been provided



Move Renewal Request into EFC

288 2022-06-23 2022-06-23 3:52:45 pm REGIONAL TRAINING: Academic Accommodations Request Form Long-Term Accommodations Request Office of Student Success Angela Martin

Showing 1 to 12 of 12 entries

<u>20210017</u>	All parties					
<u>2021001701</u>	Angela Noelle Martin	987654009	Awaiting Re-Certification	2022-06-09	Disability Services	
<u>2021001702</u>	Angela Noelle Martin	987654009	Open	2022-06-09	Disability Services	

Move into EFC Go

Case or File ID

20210017

- Move Renewal Request into EFC shared by all parties by entering that 8-digit Case number.
- Take opportunity to rename file appropriate (e.g. Summer 2023 Renewal Request).



Manage Renewal Request

- Earlier File can be marked as Closed (change status)
 - This means you only have one open file per student.
- Update Notes
 - Begin using Shared Notes from the first file
- Complete CRF
- Send Communications
- Rinse and Repeat!



> Impact on
P r i o r H i s t o r y



How Does This Look?

- Can limit prior history to just Disability Services or Accommodations Case Type
- Accurately provides the number of times an individual has been provided accommodations
- Should reflect just one open file at a time



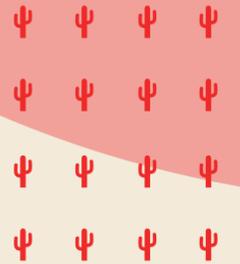
> Pregnancy and
Parenting
Accommodations



Use of Milestones

Set up Pregnancy/Parenting Case Type

- You can use Milestones to track the number of times a pregnancy/parenting accommodations is granted over course of the pregnancy or parenting concern.
- Create case as typical
- Complete CRF and send communications
- Key – Add Milestones to track each time accommodation is claimed



Use of Milestones

Update Existing Case

2022001201 Angela Noelle Martin (987654009)

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS NOTES OTHER

Access Restriction
Disability Services

Collaborators
Click here to select collaborators ...

Milestones

Extended Time for Assignment	Saturday April 8, 2023 at 12:00am	<input type="checkbox"/> Delete milestone
Excused Absence	Sunday April 9, 2023 at 12:00am	<input type="checkbox"/> Delete milestone
Extended Time for Assignment	Monday April 17, 2023 at 12:00am	<input type="checkbox"/> Delete milestone
Extended Time for Assignment	Friday April 28, 2023 at 12:00am	<input type="checkbox"/> Delete milestone
Extended Time for Assignment	Tuesday May 9, 2023 at 12:00am	<input type="checkbox"/> Delete milestone
Excused Absence	Thursday May 25, 2023 at 12:00am	<input type="checkbox"/> Delete milestone

Counting Milestones

191 - Cases with Milestones

LEGEND: Report displays for the specified date range and date of reference, the list of cases with milestones. There is one table for each case type. If cases of a particular case type do not have any milestones, then that case will not appear on this report. If two or more file IDs on the same case have a different case type, then the results will appear in each of the case type tables. The order of the columns for the milestones is based on their order in the "Milestones" field in "Configuration. If the milestone doesn't exist in the "Milestones" field in "Configuration" screen, then it's placed at the end of the columns.

Note: This report makes use of access restrictions, meaning that if a user is not a member of the group to which a case is restricted, that user will not see that case on this report when viewing it.

DESCRIPTION: Milestones for Cases Where Type is Disability Services
DATES: INCIDENT DATE between January 1, 2023 and June 8, 2023
CASE TYPES: All
HOME OFFICES: All
RESULTS: 1
RESTRICTIONS: This report respects cases access restrictions. Therefore, you may see more or less here than other users, depending on your individual access to the component cases.

CSV Excel Filter Results Column visibility ▾

Showing 1 to 1 of 1 entries

Search:

Case Number	Type	Home Office	Name (SID)	Incident Date	Incident Location	Reported Date	Case Created Date	Excused Absence	Extended Time for Assignment
20220012	Disability Services	Office of Disability Services	Angela Martin (987654009)	2023-04-08	Engineering	2023-04-08	2023-04-08	2023-04-09 04:00:00 2023-05-25 04:00:00	2023-04-08 04:00:00 2023-04-17 04:00:00 2023-04-28 04:00:00 2023-05-09 04:00:00



Counting Milestones

192 - Count of Milestones by Case Type

LEGEND: Report displays for the specified date range and date of reference, the count of milestones by case types. If two or more file IDs on the same case have a different case type, then the results will appear in each of the case type columns. If this occurs, then the sum of the counts in the "Total" row for each table will be inflated. The order of the columns for the milestones is based on their order in the "Milestones" field in "Configuration. If the milestone doesn't exist in the "Milestones" field in "Configuration" screen, then it's placed at the bottom of the list.

Case Type is "Disability Services" Case Type is "Student Conduct"

DESCRIPTION: Count of Milestones Where Case Type is "Disability Services"
DATES: INCIDENT DATE between January 1, 2023 and June 8, 2023
CASE TYPES: All
HOME OFFICES: All
RESULTS: 2
RESTRICTIONS: This report ignores case access restrictions.

CSV Excel Filter Results Column visibility ▾

Showing 1 to 2 of 2 entries Search:

Milestone	Count of Cases
Excused Absence	2
Extended Time for Assignment	4
TOTALS	6

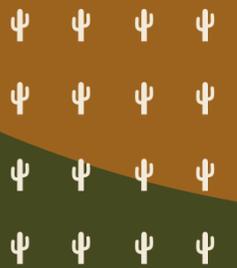




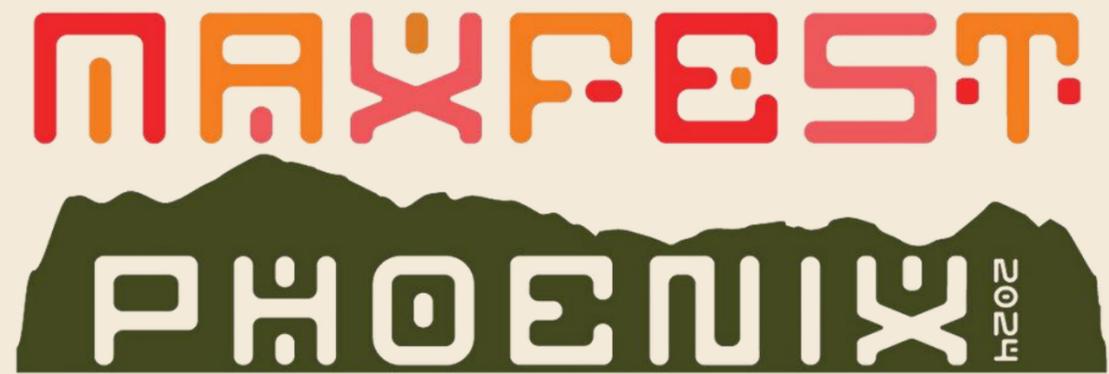
Questions?



Thank You!



Please complete the evaluation
for this program, found in
Guidebook, to help us plan for
future MaxFests.



Be Your Own Maxient M.D.

System Health Checks



Jason Andrews
Senior Clients Support Specialist
Maxient, LLC

The Doctor is in...



**Necessary
Tools**



**User
Management**



**Information
Distribution**



**Data
Administration**



The Necessary Tools



The Necessary Tools



Analytic Reports



Level 5 User Involvement



Your Own Insights!

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Analytic Reports



900 Reports

These reports provide a 20,000' view of the system and indicate where there may be issues or discrepancies in data or user accounts



Custom Reports

Constructed to meet more specific data set needs and can also allow for batch changes of field values across your case files

Level 5 User Involvement

Many of the changes you will want or need to make in the system will require, minimally, a Level 5 user. If you are not one, this is the time to make a friend 😊

This can also be a great opportunity for Level 5 users to connect/re-connect with lower level users about day-to-day issues or needs within the system

You Know Your System



Have you or other users noticed anything which feels clunky or “sticky”, items not appearing as you expect them, or submitted reports not landing where you expect them to?

Analytics



When running analytic reports do the numbers seem right, or do they feel as though something is missing or is out of place? Do you have multiple variations of the same thing?

Your Own Insights





User Management



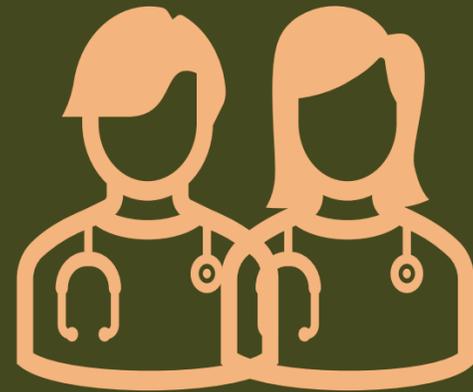
Users: What Can They Do?

Analytic 900: User Accounts Report

- Provides a comprehensive list of settings for each user
- CTRL / CMD "F" are your best friend... also that "Search" box too
- This is a "big" report – take things a couple items at a time.
 - Consider grouping users into functional areas and what they should be able to do and have access to



Maxient M.D. Says...



- Go to “Manage Users” and fully update one account a time.
- An ounce of prevention is worth a pound of cure – Invest the time.
- If you need to restart – Delete and replicate

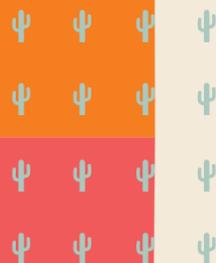
Users: Are They Engaging?

Analytic 901: User Account System Health Check

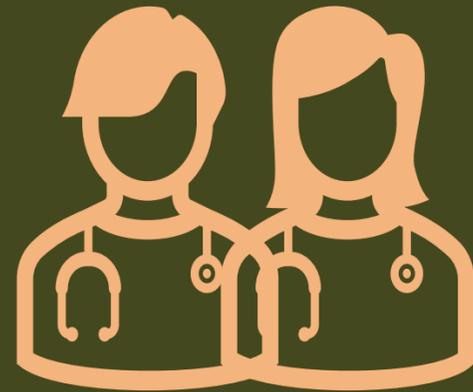
- Goal is to show how folks are engaging with the system
 - When they last logged in
 - How many pending IRs are assigned to them
 - Statuses of cases assigned to them make sense
- Understanding where some may be overloaded/behind
- Adds perspective to who really needs to log in

Logs: User Activity Report

- Provides a detailed account of what, precisely, a user is doing... or not doing.



Maxient M.D. Says...



- Go to “Incoming Reports” -- how old are some of the pending IRs?
- Outreach to users to discuss their use and where they need assistance
- Review and update your user list and delete unneeded accounts

Users: Are They Engaging?

Analytic 7: Case Turnaround Analysis

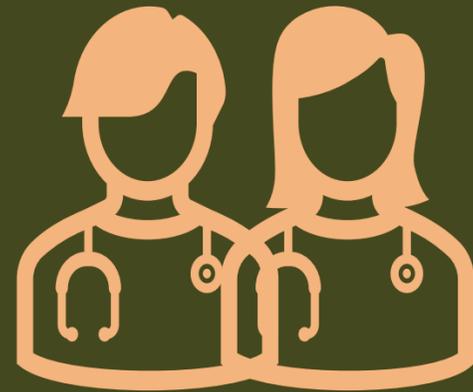
- Provides an overview of all cases and the time it takes to resolve cases – Individually and Averages
- A “health check” of your processes

Hearing Officer Dashboards

- Specific to individuals’ Hearing Officer Title
- Case turnaround for their specific cases
- Overdue Cases



Maxient M.D. Says...



- Opportunity to get processes and people back on track
- Consider using tasks to help folks redirect towards success
- Allows for a clear message on expectations that is backed by data



Information Distribution

Where Does It Go?
Who Gets It?



Where Does Information Go?

Analytic 902: Routing Rules Report for Incident Report Layouts

- This is a powerful tool – use it to check your rules and even compare them
- Items that are red are considered “broken”, which may explain unusual behaviors in routing
- A great way to survey who gets IRs routed to them and who gets copied
 - Bold carbon copy emails means they are not a user – not a bad thing.

Maxient M.D. Says...



- Fix broken rules and build routing rules
- Stay away from duplicate rules
- Use Hearing Officer Titles for recipient - helps with staff transition
- IRs should route to a person that will take action on the (i.e. turn them into cases)

Who Gets Information – Beyond IRs

Analytic 914: Hearing Officer Titles (HOTs) in Use

- All HOTs in the “Assigned to” of all cases and whether it is occupied
- Allows you to see changes in HOTs and find cases that may have been lost in staff transition
- Tells you whether HOT is in your Configuration area

Maxient M.D. Says...



- Reach out to Maxient to help move cases around
- Make sure all actively assigned HOTs are in the Configuration Area

Who Gets Information

Analytic 913: Open Cases Not Assigned to a Current User

- No one is tracking these cases
- Note the “Last Modified” date and determine what you need to do with these cases

Maxient M.D. Says...



- Look for cases with red flags that may need immediate follow up
- Check the audit trail of these cases to see who created the case
- For stagnant cases: determine what you want to do with them

Who Gets Information

Analytic 915: Cases with No Access Restriction

- If you are regularly using access restrictions *OR* recently made it required, look here
- Look at the “Count” tab first to find your problem areas

Maxient M.D. Says...



- If access restriction is important, set your system to make it required (on Configuration)
- If there are trends by case type, work with the staff responsible for those cases
- If there are large numbers of cases to restrict, reach out to us!



Data Administration

Where do the numbers come from?



Demographic Information

Analytic 910: Demographic Feed and Configuration Screen Values Crosscheck

- Side by side comparison of your feeds, configuration, and cases
- Mismatches aren't the end of the world, but some consistency is important
- Impacts many of the demographic based analytics

Maxient M.D. Says...



- Ideally have what is in your demographics feed and configuration match
- Review IR layouts to check for consistency
 - Analytic 903 – IR Layout Field Values
- Accounting for information in cases – What is worth changing.

Clery Geography

Analytic 911 – Clery Locations Crosscheck

- Your Clery folks will thank you
- Reviews Incident Locations and compares to Clery Locations in Configuration
 - *This report is considering date range*
- You will see whether it is categorized, and where

Maxient M.D. Says...



- Make sure incident locations are up-to-date and categorized
- Never delete Clery locations from configuration
- Knowing what locations are ok to be considered uncategorized

Dates in Cases

Analytic 912: Cases with Problematic Dates

- Look for “Yes” in the columns to determine where the issue is
- Also, cases missing key dates are shown

Maxient M.D. Says...



- Try to update the dates if possible
- Check the audit trail to see who last managed it and reach out to them if you can
- This is going to change some of your analytics – be prepared



Questions?



Thank You!

Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.



Beyond Conduct: Using Maxient for More Processes



LaRonda Brewer
Assistant Dean of Students

MaxFest 2024





GSU At-A-Glance

- Research I Institution
- Large, Public
- Enrollment = ~52,000
- Predominately Black Institution (PBI)
- Urban
- #1 in awarding degrees to African American students
- #2 in Innovation



Office of the Dean of Students

- Student Conduct

- Assistant Dean
- 2 Coordinators
- 2 Graduate Assistants
- 1 Senior Records Coordinator

- Student Support

- Assistant Dean
- 2 Coordinators
- 1 Administrative Specialist

Academic Dishonesty





The Process

- DOS Role = Recordkeeper (+)
- Case Resolution
 - Academic Penalty Only and no prior history
 - Recommended Disciplinary Penalty (+)
 - Academic Dishonesty History (+)



Academic Dishonesty Reporting Form

Reporter Information

Faculty member's full name:

Date of incident *(Required)*:

[Learn more](#)

Academic College *(Required)*:

Course and Course Number:

[Learn more](#)



Involved Party

Student's First and Last Name

Panther ID Number (no dashes)

University Email address



Questions

Type of Academic Dishonesty *(Required)*

- | | | |
|---|---|---|
| <input type="checkbox"/> Cheating on Exam | <input type="checkbox"/> Multiple Submissions | <input type="checkbox"/> Unauthorized Collaboration |
| <input type="checkbox"/> Falsification | <input type="checkbox"/> Plagiarism | <input type="checkbox"/> Unauthorized Public Posting and Distribution |

Academic Penalty(ies) *(Required)*

- | | | |
|---|--|--|
| <input type="checkbox"/> Zero on Assignment | <input type="checkbox"/> Point Penalty | <input type="checkbox"/> Retake Exam Rewrite Doctoral Exam |
| <input type="checkbox"/> Fail Assignment | <input type="checkbox"/> Grade Deduction | <input type="checkbox"/> Deferral of Graduation |
| <input type="checkbox"/> F in Course | <input type="checkbox"/> Fail Comprehensive Exam | <input type="checkbox"/> None |
| <input type="checkbox"/> Redo Assignment | <input type="checkbox"/> Grade Change | <input type="checkbox"/> Other |

If you selected "Other" under Academic Penalty, please specify the academic penalty:



Campus *(Required)*

- Alpharetta
- Atlanta
- Buckhead
- Clarkston
- Decatur
- Dunwoody
- Newton
- Perimeter Online



Supporting Documentation

Attach in one PDF the notification letter from the College, the Notice of Academic Dishonesty, and the Supporting Documentation. 5GB maximum total size.

Attachments require time to upload, so please be patient after submitting this form.

Choose files to upload

Choose Files

Select copy recipients

Admissions Background Review





- **Process triggered when:**

- An applicant answering yes on their application for the security questions related to:
 - Criminal history
 - Student conduct history at high school or college
 - Military history
- A current student should have revealed criminal or conduct history on their application



Decision Matrix

Offices of Admission Undergraduate and Graduate	Admissions Background Review Committee
DUI Drug use Good Standing (except incidents of sexual misconduct) Theft Shoplifting Non felony charges	Drug Distribution Assault with Deadly Weapons Felony Charges Sexual Misconduct Pending disciplinary/ academic proceeding



How we utilize *Maxient* for this process

- Notification to DOS
- Communication with applicants
- Collection of Information
- ABR Committee
- Case Resolution Form
- Appeals



Notification to DOS



Admissions Background Review Reporting Form

Reporter's Information

You are currently authenticated as **LaRonda Brewer**. [Not you?](#) 

Your full name:

Your email address:

Application Term:

 [Learn more](#)



Applicant Information

Applicant's First and Last Name

Select Role

Panther ID Number (no dashes)

Applicant's email address from application

Questions

Please select the applicant's campus type. **(Required)**

- Atlanta Undergraduate Applicant
- Atlanta Graduate Applicant
- Perimeter Applicant



Supporting Documentation

Please attach the applicant's Admissions application and any other documents as needed. 5GB maximum total size.

Attachments require time to upload, so please be patient after submitting this form.

Choose files to upload

Choose Files

Email me a copy of this report

Submit



Communication with Applicants

- Multiple Letter Templates
 - Criminal History – In State or Out of State
 - Military Discharge - DD214
 - High School or College (Release of Information Form)
- Additional Information Form



Admissions Background Review - Additional Information Collection

Applicant:

Based upon the review of information you submitted on your application or should have disclosed on your application, we need to some additional information to initiate the Admissions Background Review Process. Please answer all of the questions below.

If you have any questions, please email backgroundreview@gsu.edu.



Applicant Information

Legal Name

Select Role

DOB (YYYY-MM-DD)

Cell Phone Number

Personal Email Address



Questions

In the following section, we need information on your criminal history, high school or college conduct, and military discharge. Please answer all questions truthfully.

Do you have criminal history? Include all criminal history including cases where you entered guilty plea or first offender sentence or were found guilty? **(Required)**

- Yes
- No

In which state(s) do you have criminal history? **(Required)**



Did you have a dishonorable or other than honorable discharge from the military? (Required)

- Yes
- No

Do you have conduct history at a previous high school, college, or university? (Required)

- Yes
- No

If so, what is (are) the name(s) of the school, college, or university? If your answer in the previous section was No, please enter, N/A in this section. (Required)



ABR Committee

- Composition of Committee:
 - Undergraduate Admissions
 - Graduate Admissions
 - Dean of Students/Student Conduct
 - Legal Affairs
- User Level – Level 1
- Access Restrictions – ABR/CDR/DOS
- Review of documents in the electronic filing cabinet



Appeal Process



Admissions Background Review - Appeal Form

Appeals should be submitted within 5 business days of the original decision (deadline date is noted on the decision letter). Your appeal should include a typed intent to appeal statement as well as any additional documentation that addresses your rationale for appealing the decision, and any new information that may impact the decision. This will be your only opportunity to present new information and or documentation.

You may submit your appeal including any additional information using this form.



Background Information

Your Legal Full Name (First and Last Name)	Campus	Panther ID Number (no dashes)	Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address			
<input type="text"/>			

Upload Appeal

Include your appeal statement AND any additional documentation. 5GB maximum total size.

Attachments require time to upload, so please be patient after submitting this form.

Choose files to upload

Continuing Duty to Disclose





The Policy

Georgia State University Students have a continuing duty to report criminal/disciplinary events that occur after application to the university. The criminal/disciplinary events that must be reported are described below and reports must be made to the Office of the Dean of Students, deanofstudents@gsu.edu, within 72 hours of the Student's notice of the event. Failure to comply with this requirement may result in sanctions up to and including immediate withdrawal from the university.

- Conviction of a crime other than a minor traffic violation;
- Criminal charges filed against the Student;
- Entering a plea of guilty, a plea of no contest, a plea of nolo contendere, an Alford plea, or a plea under any first offender act in response to charges filed against the Student; and
- Disciplinary or academic misconduct charges initiated or sanctions imposed against the Student from a high school or former college or university.

The university will review all reported incidents to determine if the Student's conduct poses a significant threat to the safety and well-being of the University Community.



How We Use Maxient

- Letter Templates
- Connection to ABR Process
 - Follow the same process
 - Potential Invalidation

Dean's Certification





What is a Dean's Certification?

- Certification of student conduct record
- Common types of Certifications
 - State bar
 - Students or Former students enrolling at other institutions
 - Federal Government



Methods of Certification

- Form
- Letter of Good Standing
- Letter explaining student's history



What is Reportable?

- Only cases where students have been found responsible
- Not Reportable
 - Academic dishonesty cases with only an academic penalty
 - Informal Resolution– Community Intervention Program
 - Community Living Standards- noise, guest violations



Dean's Certification Form

Please complete the form in its entirety and provide the following:

- The student's full name while attending Georgia State University
- Panther ID number (or date of birth if you do not remember your Panther ID)
- Phone number and email address
- An email address for where the completed Dean Certification should go
- The student's signature and date on the form from the requesting institution (this is the student's permission to release the information). Note: The form cannot be submitted blank or processed without the student's signature.

If your form is **requesting disciplinary/student conduct information and academic information** (GPA, academic standing, etc), you can submit this form, and we will forward the form to the Office of the Registrar upon completing the conduct portion of the form.

If your form is **only requesting academic information**, please do not use this form. You need to submit the form to recgradsvc@gsu.edu.

Thank you.



Student or Former Student for Whom You Are Requesting Certification

First and Last Name

Select Role

Panther ID Number (No Dashes)

DOB (YYYY-MM-DD)

Cell Phone number

Email address

Add another party



Additional Information

Please list the name of EACH institution to which we should send a report, as well as the e-mail address we should use to send it. You can list more than one email address. Example: Prestigious University - prestigousexample@mail.com (Required)

Do you have a specific candidate or applicant number that we need to reference on our report? (Required)

- Yes
- No

What is your specific candidate/applicant number? (Required)



Campus (Required)

- Alpharetta
- Atlanta
- Atlanta Online
- Clarkston
- Decatur
- Dunwoody
- Newton
- Perimeter Online

A Dean's Certification can be a form or letter. Please let us know what you need. (Required)

- I need you to complete the form I am attaching to this submission.
- I need a letter stating the student's conduct history.
- I need a form completed AND a letter stating the student's conduct history.



Did the student sign the form? The student must complete the student information section and sign the waiver section. The student's signature and date on the form from the requesting institution is the student's permission to release the information. Note: The form cannot be submitted blank or processed without the student's signature. Check to confirm that the student signed the form or that you are uploading a separate FERPA Release of Information. **(Required)**

Yes

Supporting Documentation

Please upload all supporting documentation. 5GB maximum total size.

Attachments require time to upload, so please be patient after submitting this form.

Choose files to upload Choose Files

Submit



Creating the Case in Maxient

- Current students in your data feed
- Manual Input of needed information
 - Student's name
 - Student's email address
 - Date of birth
 - Gender
 - Ethnicity



Letter of Good Standing

To Whom It May Concern:

This is to verify that [student's name] has had no disciplinary actions or proceedings during his/her enrollment at Georgia State University. [Student's first name] is in good disciplinary standing.

Sincerely,



Disclosing Student History

I am writing in response to a request for information on the above referenced student. This individual has given written consent indicating that information pertaining to records at Georgia State University may be released to you.

During enrollment at Georgia State University, [Student's First Name] was involved in the following disciplinary action:

Incident Date

Charges

As a sanction, [Student's first name] was required to complete the following sanction(s):

[Student's first name] has completed all sanctions and this matter is closed.

If you have any questions about the reported information, please contact me at laronda@gsu.edu.

Sincerely,



Completing A Form

Office of Admission and Financial Aid

College & University Certification

PART I: To Be Completed by the Prospective Tulane Law School Student

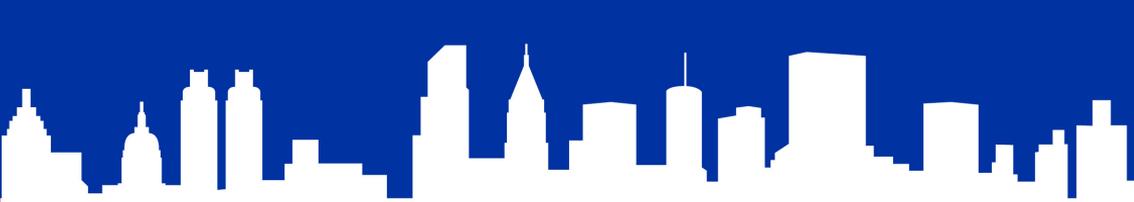
Please complete the first part of this form, and give it to the administrative office in charge of **student disciplinary records** at each college and university you attended prior to enrolling at Tulane Law School. Make as many copies of the form as necessary. **The form must be returned directly to Tulane Law School by the individual completing the form.**

Institution Completing Questionnaire: Georgia State University

Student Name: [REDACTED] ID Number at Institution: [REDACTED]

In accordance with the Family Educational Rights and Privacy Act of 1974 ("FERPA", or the "Buckley Amendment"), I, the undersigned, hereby authorize the institution named above to release for all purposes any and all financial, academic, disciplinary, or other educational records and information to Tulane University.

[REDACTED] [REDACTED]
Student Signature *U* Date



Completing A Form

PART II: To Be Completed by the Designated College or University Official

Thank you for providing us with the requested information about this student's official record. Please include any information that would help us to assess his or her character and fitness to practice law.

Was this applicant subject to academic or disciplinary sanctions, or are there any such charges pending? Yes No

Do you have any reason to doubt this individual's personal or academic integrity? Yes No

If the answer to either question is yes, please provide relevant details below. (Attach additional sheets as necessary.)

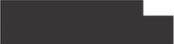
LaRonda R. Brewer

Name of Official (Printed)

Assistant Dean of Students

Position


Signature of Official


Date

No Hazing @ State





Max Gruver



- 18-year-old LSU student
- From North Fulton County, GA
- Pledged Phi Delta Theta
- Attended Bible Study
 - Hazing ritual in which teenage pledges were pressured to chug several bottles of Diesel, a 190-proof grain liquor
- Died of alcohol poisoning and aspiration less than 24 hours later

Max Gruver Law



'Haze' or 'hazing' means to subject a student to an activity which endangers or is likely to endanger the physical health of a student, or coerces the student through the use of social or physical pressure to consume any food, liquid, alcohol, drug, or other substance which subjects the student to a likely risk of vomiting, intoxication, or unconsciousness regardless of a student's willingness to participate in such activity.

<https://www.legis.ga.gov/legislation/59273>



HAZING POLICY



- Examples of activities that may violate this policy include but are not limited to the following:
 - forcing, requiring or encouraging nudity at any time;
 - paddle swats;
 - treeings (e.g., tying someone up and throwing food or other substances on them);
 - **line-ups (e.g., yelling at or harassing people in a formation);**
 - **calisthenics (e.g., push-ups, sit-ups, jogging, runs);**
 - causing an individual to be **sleep deprived** and/or to suffer from unreasonable fatigue;
 - conducting activities that do **not allow adequate time for class attendance**, study and completion of assignments, participation in group projects;
 - theft of any property;
 - **road trips** (e.g., dropping someone off and leaving them to find their own way back);
 - performing acts of **personal servitude** for members (e.g., driving them to class, cleaning their individual rooms, serving meals, washing cars, shopping, laundry);
 - scavenger hunts without prior approval from the appropriate university appointed official, or which includes activity that would otherwise constitute hazing;
 - forcing or requiring the violation of university policies, federal, state, or local law.

NO HAZING @ STATE



Georgia State Home

STUDENTS

FACULTY & STAFF

ALUMNI



Office of the Dean of Students

About

Student Assistance

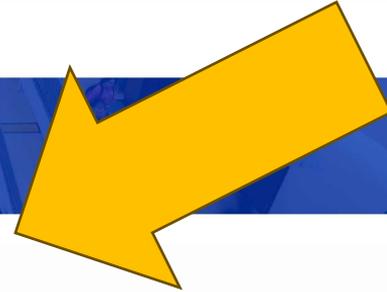
Student Conduct

Sexual Misconduct

Programs & Services

Faculty

STUDENT CONDUCT



Conflict Resolution & Decision-Making Workshops

Policy on Academic Honesty

Student Code of Conduct

FERPA

Hearing Boards

Reporting Code of Conduct Violations

Student Ethics and Standards Board (SESB)

Student Organization Hearings

REPORT A HAZING INCIDENT

No Hazing @ State

At Georgia State, we are committed to providing a safe educational environment for our students and student organizations. As outlined in the [Student Code of Conduct](#), hazing is a violation of state law and is strictly prohibited by Georgia State both on and off campus. Violation of this policy may result in both disciplinary action and criminal charges.

In compliance with the [Georgia SB 85 "Max Gruver Act"](#), beginning July 1, 2021 Georgia State will publicly disclose administrative adjudication of hazing or hazing related convictions. The law requires that institutions establish policies to facilitate the:

- (1) Reporting, investigation, provision of due process, and administrative adjudication of alleged incidents of hazing as related to students and student organizations; and
- (2) Public disclosure of administrative adjudications of hazing or hazing related convictions within 15 calendar days of final adjudication or public notice of criminal conviction and remain posted for a period of no less than five years.



Hazing Investigation Form

Submission Information

You are currently authenticated as LaRonda Brewer. [Not you?](#)

Today's Date (Required):

mm/dd/yyyy



Your Information

Your Full Name

Panther ID (No Dashes)

Cell Phone Number

GSU Email address



Hazing Policy and Questions

Please read the following definition of hazing from the Georgia State University Student Code of Conduct “Hazing” means any intentional, negligent or reckless action, activity or situation that endangers or is likely to endanger the physical health of an individual or causes an individual pain, embarrassment, ridicule or harassment as a condition or precondition of gaining acceptance, membership, office or other status in a student group, whether or not such group is formally recognized by the University and regardless of the individual’s willingness to participate. Actions and situations that may constitute hazing may include, but are not limited to, the following: forcing or requiring the drinking of alcohol or any other substance; forcing or requiring the consumption of food or any other substance; calisthenics (e.g., push-ups, sit-ups, jogging, runs); treeings (e.g., tying someone up and throwing food or other substances on them); paddle swats; line-ups (e.g., yelling at or harassing people in a formation); theft of any property; road trips (e.g., dropping someone off and leaving him/her to find his/her own way back); scavenger hunts; causing an individual to have fewer than six (6) continuous hours of sleep per night; conducting activities that do not allow adequate time for study (e.g., not allowing an individual to attend class, causing one to miss group projects); forcing or requiring partial or complete nudity at any time; performing acts of personal servitude for members (e.g., driving them to class, cleaning their individual rooms, serving meals, washing cars, shopping, laundry); forcing or requiring the violation of University policies, federal, state or local law. Based on the above definition, did hazing occur during your membership intake process?

(Required)

- Yes
- No



If yes, list specific behavior that you believe constitutes hazing and the individual(s) involved in the hazing:

According to Sections II (A) 13 of the Georgia State University Student Code of Conduct (the “Code”): Providing any false statement or misleading information, including by omission, to or about the University. I certify that the information provided in this document is true to the best of my knowledge, and understand that omissions or misrepresentation is a violation of Georgia State University’s Student Code of Conduct. (Required)

I agree.

Submit

Community Intervention Program





What is Community Intervention?

- Building on the tenets of the Restorative Justice program, the Community Intervention Program provides a form of informal resolution for students engaged in the student conduct process. This program will serve students whose conduct does not require an interim measure and is not a serious threat to the university community. A strong focus on student development and their understanding and adherence to the Pounce Pillars are key elements of the program.



Key Provisions

- Not allowed for Interim Measure case or cases where suspension and expulsion are recommended
- Only allowed to participate in the Community Intervention Program once
- Students must accept responsibility
- No appeals
- Students will have the option of an informal resolution if they have not previously completed the program
- Will not count as reportable student conduct records for background check; however, ODOS will use this information in determining a student's eligibility for the Community Intervention Program and when determining future sanctioning options.



University Housing - Incident Report Form

This Incident Report Form is intended for alleged violations of the Student Code of Conduct & Community Living Standards that occur in University Housing. Please remember to write all reports in third party and check for spelling and grammar. Thank you.



Background Information

You are currently authenticated as **LaRonda Brewer**. [Not you?](#)

Your full name:

Your position/title:

Your phone number:

Your email address:

Urgency of Report **(Required)**:

Date of Incident **(Required)**:

Time of Incident:

Location of Incident **(Required)**:

Specific Location:



Involved Parties

Please list the individuals involved (excluding yourself), including as many of the listed fields as you can provide. Panther IDs are required (no dashes). For non-students, please list an SSN or Drivers License number in the block labeled SID (Student ID #) if available.

Name or Organization	Select Role	ID Number	DOB (YYYY-MM-DD)
<input type="text"/>	<input type="text" value="▼"/>	<input type="text"/>	<input type="text"/>
Phone number	Email address	Hall/Address	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Add another party



Questions

Please provide a detailed description of the incident/concern using specific concise, objective language (Who, what, where, when, why, and how). (Required)

Check all that apply: (Required)

- None
- EMS Called
- EMS Transport
- EMS Transport Refused
- Arrest
- Criminal Charges Pending



Did the incident involve a student conflict? *(Required)*

Please Choose...

If the incident involved a conflict, who were the involved parties? *(Required)*

- No Conflict
- Student v. Roommate
- Student v. Student
- Student v. Student Staff
- Student v. Professional Staff
- Student v. Police



Supporting Documentation

Photos, video, email, and other supporting documents may be attached below. 1GB maximum total size. Attachments require time to upload, so please be patient after submitting this form. PDF preferred for word/text documents. 5GB maximum total size.

Attachments require time to upload, so please be patient after submitting this form.

Choose files to upload

Choose Files

Email me a copy of this report

Submit



CIP - Initial Letter

{{BASIC_SALUTATION}},

The University has received information that you may have violated the Georgia State University Student Code of Conduct (the \"Code\"). Please schedule a Community Intervention Intake Meeting to determine if we can engage in an informal resolution of the reported conduct. As a part of our Community Intervention Program, it is our goal to create an environment where:

- Students are engaged in the community,
- Students act as responsible members of the community,
- Students develop an understanding of ethics and integrity, and
- Students feel that they are a part of the Georgia State Community.

A summary of the information that we have received at this time includes: {{INCIDENT_SUMMARY}}



Based on the information received, we will discuss the following potential policy violation(s) in addition to other Code violations that may be revealed through our conversation:

{{EXPANDED_CHARGES_LIST_BULLETS}}

At the conclusion of your Community Intervention Intake Meeting, the Office of the Dean of Students will determine if your case is eligible for resolution under the Community Intervention Program.



Please schedule a Community Intervention Intake meeting with me no later than {{CALC_5_BUSINESS_DAYS}}. You may schedule your virtual meeting to occur over the phone or via the web by emailing me at {{ASSIGNED_TO_EMAIL}}. If you have an international number or choose the web-based meeting, you will receive a meeting invitation sent to your Georgia State University email address. If you fail to respond by {{CALC_5_BUSINESS_DAYS}}, your case will be forwarded to the student conduct process for an Administrative Resolution.

Thank you for your prompt attention to this matter.

Sincerely, {{SIGNATURE}} Dean of Students Designee



The Restorative Conversation

- What happened?
- What were you thinking at the time?
- What are your thoughts about the incident since it occurred?
- Who has been affected by what you have done?
In what way?
- What do you think you need to do to make things right?



Community Intervention Program Resolution Form

Background Information

You are currently authenticated as LaRonda Brewer. [Not you?](#)

Date of Meeting (Required):

mm/dd/yyyy



YOUR INFORMATION

Full Name

ID Number

GSU Email address

Your Case Number



RESPONSIBILITY AND RESOLUTION ELECTION

During your meeting with the Dean of Students, you discussed the following violation(s) of the Student Code of Conduct and are accepting responsibility for these violation(s): *(Required)*

- A1. Violation of the Student Code of Conduct or any university policies, rules or regulations.
- A2. Conduct which is obscene or indecent.
- A3. Disruption or obstruction of teaching, instructional, research, disciplinary, public service, administration, or other university activities.
- A4. Harassing a person through unwanted conduct directed at him/her that causes reasonable fear for safety (e.g., Stalking) or is sufficiently severe, pervasive and persistent that it interferes with the person's university employment or ability to participate in or benefit from university programs.
- A5. Threatening physical abuse, intimidation, coercion, retaliation, and/or conduct which threatens the health or safety of others.
- A6. Physical abuse, intimidation, coercion and/or other conduct which endangers the health or safety of others.
- A7. Attempted or actual theft of and/or damage to property belonging to the university, any Member of the university Community or others.
- A8. Possession of property the Student knows or has reason to believe may be stolen or misappropriated.
- A9. Use, possession, display or storage of any weapon, dangerous instrument, explosive device, fireworks, or dangerous chemical unless specifically authorized by university officials, or local, state or federal law.
- A10. Public intoxication or use, possession, consumption, Distribution or sale of alcoholic beverages except as expressly permitted by the university's Alcohol Policy (see the Alcohol Policy).



- A11. Use, consumption and possession or Distribution of any narcotic, dangerous drug or Controlled Substance or possession of drug paraphernalia that would violate the law.
- A12. Falsification, forgery, alteration, Fabrication or misuse of university records, forms or other documents.
- A13. Providing any false statement or misleading information, including by omission, to or about the university.
- A14. Providing or gaining unauthorized access to or use of university property, resources or facilities.
- A15. Operating a non-chartered or non-approved organization on any property belonging to the university.
- A16. Engaging in, supporting, promoting or sponsoring Hazing (see the Hazing Policy).
- A17. Gambling as prohibited by local, state, or federal law.
- A18. Engaging in any Sexual Misconduct (see the Sexual Misconduct Policy).
- A19. Commission of any offense prohibited by local, state, or federal law.
- A20. Failure to comply with directions of university officials or law enforcement officers acting in performance of their duties and/or failure to identify oneself to these persons when requested to do so.
- A21. Knowingly filing a complaint comprised in whole or part of false accusations.
- A22. Failure to respond as directed by the Dean of Students on any matter including, but not limited to, a request to meet concerning an issue, or a notice alleging a violation of the Student Code of Conduct.
- A23. Failure to comply with the sanction(s) imposed for an earlier violation of the Student Code of Conduct.



Check the Resolution Route below by which you wish to have your case resolved. All charges must be resolved through the same process. The Community Intervention Program requires the approval of the Dean of Students. (Required)

- Community Intervention Program. This involves completing an engagement conversation with the Dean of Students and the completion of the Community Intervention Plan assigned by the Dean of Students. Electing this route requires that you accept responsibility for all charges. This option is not appealable.

I acknowledge that I have reviewed and understand the information in this document and that my voluntary election regarding responsibility and resolution route are accurately represented herein. Checking this box serves as my electronic signature. (Required)

- I agree



I understand that if I fail to complete the educational requirements that my case will be forwarded to the student conduct process for an Administrative Resolution.

(Required)

I agree

I understand that the resolution of this case is not appealable. (Required)

I agree

Submit



Case Resolution Letter

{{HOUSING}} {{HOUSING_ROOM_NUM}}

{{BASIC_SALUTATION}},

Based on our conversation in your community engagement meeting, you accepted responsibility for violating the Georgia State University Student Code of Conduct (the \"Code\"):

{{EXPANDED_CHARGES_LIST}}

Specifically: {{INCIDENT_SUMMARY}}

Based upon my review of the information related to your case, as well as our discussion during our meeting, your Community Intervention Plan is as follows:

{{ALL_SANCTIONS_LIST}}

The evidence in support of this resolution is as follows:

{{RATIONALE}}



The resolution of conduct cases through the Community Intervention Program are not appealable and will not be reported on a background check. If you do not complete the sanctions, your case will be forwarded to the Student Conduct process for an Administrative Resolution.

Your experience and thoughts will assist the Office of the Dean of Students with creating enhancements to better serve the University Community. Please fill out the short evaluation at https://gsu.qualtrics.com/jfe/form/SV_erMjgTWPi5a8fgp. Thank you for your assistance.

If you have questions regarding this matter or need assistance in the future, please contact me.

Sincerely,

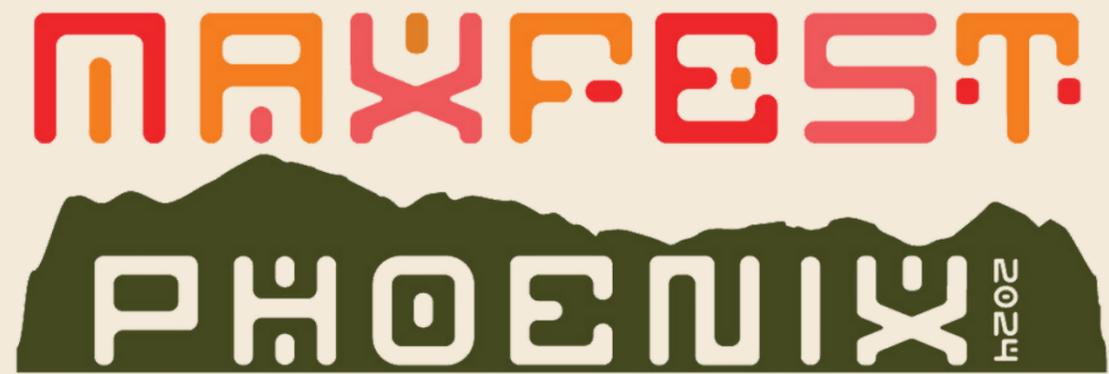
Questions



LaRonda Brewer
Assistant Dean of Students
laronda@gsu.edu

www.deanofstudents.gsu.edu





Bias Beware:

The Critical Eye of Courts on Bias Response



Adam Hark
Counsel



Jason Kistler
Senior Client Support Specialist

Presentation overview

- The state of bias response and how it has come to be viewed in the eyes of courts.
- Common functionality in your Maxient system implicated by these developments

Goal

To inspire conversations – both here today and back home on your campuses - about our ambitions for bias response, the ways we communicate those (including through the use of our Maxient system), and the perceptions that follow.



What are we **NOT** doing?

- Giving legal advice
- Giving policy advice

What is Bias Response?

“...[B]ias incidents include prejudicially motivated conduct, speech, or expression that does not constitute criminal activity. ... These incidents might include microaggressions, protests, displays, and events that are hostile to various diverse groups and are considered to have a deleterious effect on the overall campus climate and/or on particular groups on campus.”

Miller, Ryan A., et al. "A Balancing Act: Whose Interests Do Bias Response Teams Serve?" *The Review of Higher Education*, vol. 42 no. 1, 2018, p. 313-337, at 315-316.

What are its aims?

Student Well-Being? Institutional Protection?

What are the Expectations?

“At Elizabethtown, ... the small liberal-arts college in central Pennsylvania ... the baseball team had reportedly held a ‘gay drinking day,’ where partiers supposedly dressed and acted in ways they considered ‘gay,’ like drinking fruity drinks.

...

Students who report incidents ... sometimes find their colleges’ responses inadequate.

...

[A student], at Elizabethtown, also expected more—details of incidents from administrators, he says, and punishment for the baseball team’s ‘gay drinking day.’”



THE CHRONICLE OF HIGHER EDUCATION

STUDENTS

As Slurs and Offenses Multiply, Colleges Scramble to Respond

By Casey McDermott

SEPTEMBER 9, 2013

Common Criticisms of Bias Response



Vagueness in
the concept
of bias



Anonymous
Reporting



Appearance of
quasi-judicial
element



Chilled Speech

Commonalities Across Cases

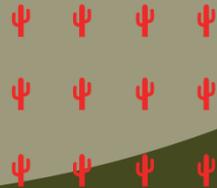


- **Same basic fact pattern:** Students wish to engage in intellectual debate and expression, but hold back for fear that their particular ideas – typically “conservative” in nature – will run afoul of the institution’s policies and/or garner the unwanted attention of the Bias Response Team (or equivalent) to the students’ detriment.
- All brought by Speech First, Inc.
- Always against public institutions
- Bias response is always challenged alongside one or more policies (e.g., harassment policies) as facially in violation of the First Amendment
- Always a pre-enforcement challenge
- Schools tend to present their Bias Response Team as without any real teeth
- Schools typically attempt some change of policy mid-litigation to render the claim moot



Laird v. Tatum

408 U.S. 1 (1972)



SUGGESTED CODE FOR JUDGING PUBLICATIONS- MOVIES- TV- PLAYS

If the dominant theme, taken in its entirety, according to average community standards, appeals to prurient interests the work can then be considered contrary to Rhode Island law, Chapter 31, sections 11-31-1, 11-31-10.

1. Female or male form(s) posed in erotic manner or dressed to stimulate sexual interests illicitly.
2. Lewd, salacious dialogue, drawings, prints, pictures, still or movies.
3. Illicit sex relations made attractive; abnormal sex actions drawn or pictured favorably, seduction or rape depicted or described favorably.
4. Illegal ads (such as Stag Party movies), unendorsed health articles, knives, guns, brass knuckles, whipping chains.
5. Depiction of sadistic crimes, excessive description of cruel behavior or punishment.
6. Marriage ridiculed, police officials demeaned constantly, concepts of justice and honor perverted either in stories or illustrations.

Bantam Books Inc. v. Sullivan

372 U.S. 58 (1963)

Speech First, Inc. v.

SCHLISSEL

939 F.3d 756 (6th Cir. 2019)

Referrals?

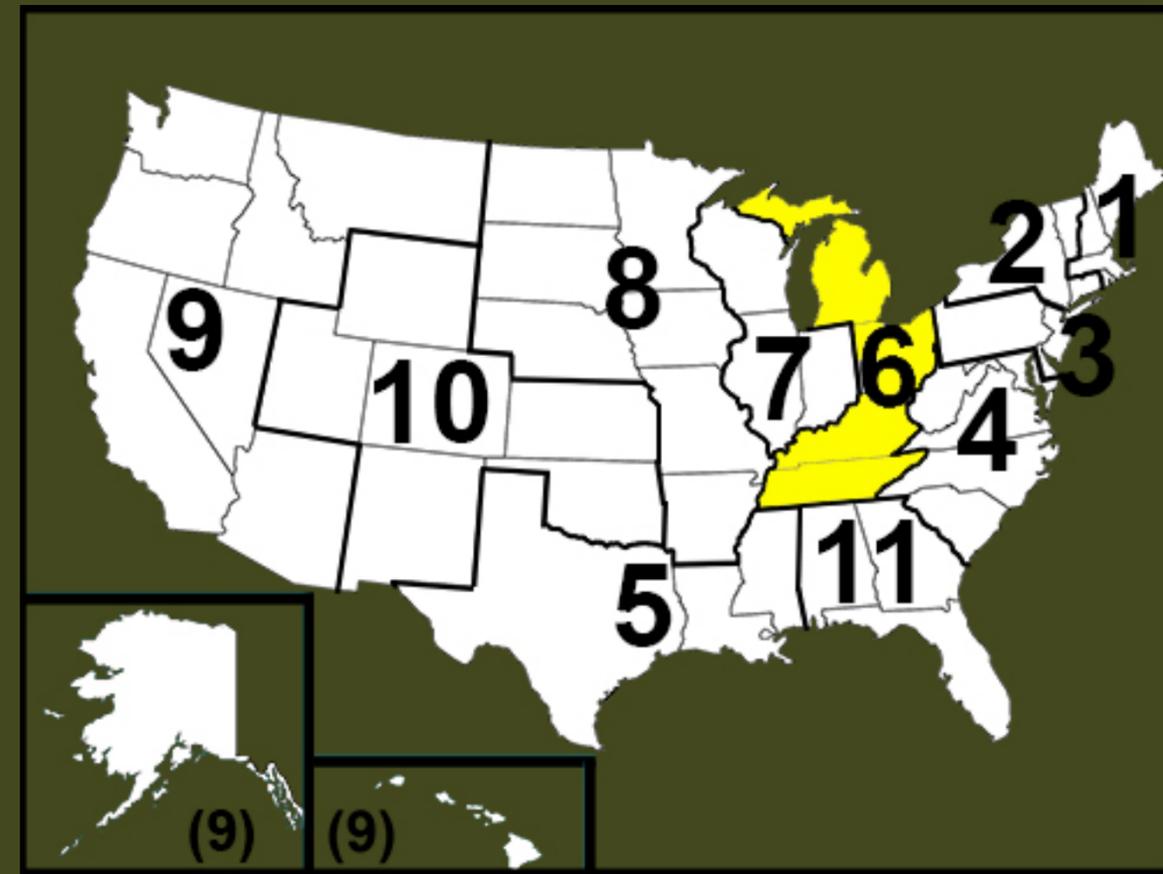
“The Response Team’s ability to make referrals – i.e., to inform OSCR or the police about reported conduct – is a real consequence that objectively chills speech. ... The referral initiates the formal investigative process, which itself is chilling even if it does not result in a finding of responsibility or criminality.”
At 765.

Invitations to Meet?

“...[T]he invitation from the Response Team to meet could carry an implicit threat of consequence should a student decline the invitation. ... It is possible that, for example, a student who knows that reported conduct might be referred to police or OSCR could understand the invitation to carry the threat: ‘meet or we will refer your case.’” At 765.

Terminology?

“...[T]he very name ‘Bias Response’ suggests that the accused student’s actions have been prejudged to be biased.” At 765.



Speech First, Inc. v.

KILLEEN

968 F.3d 628 (7th Cir. 2020)

Referrals?

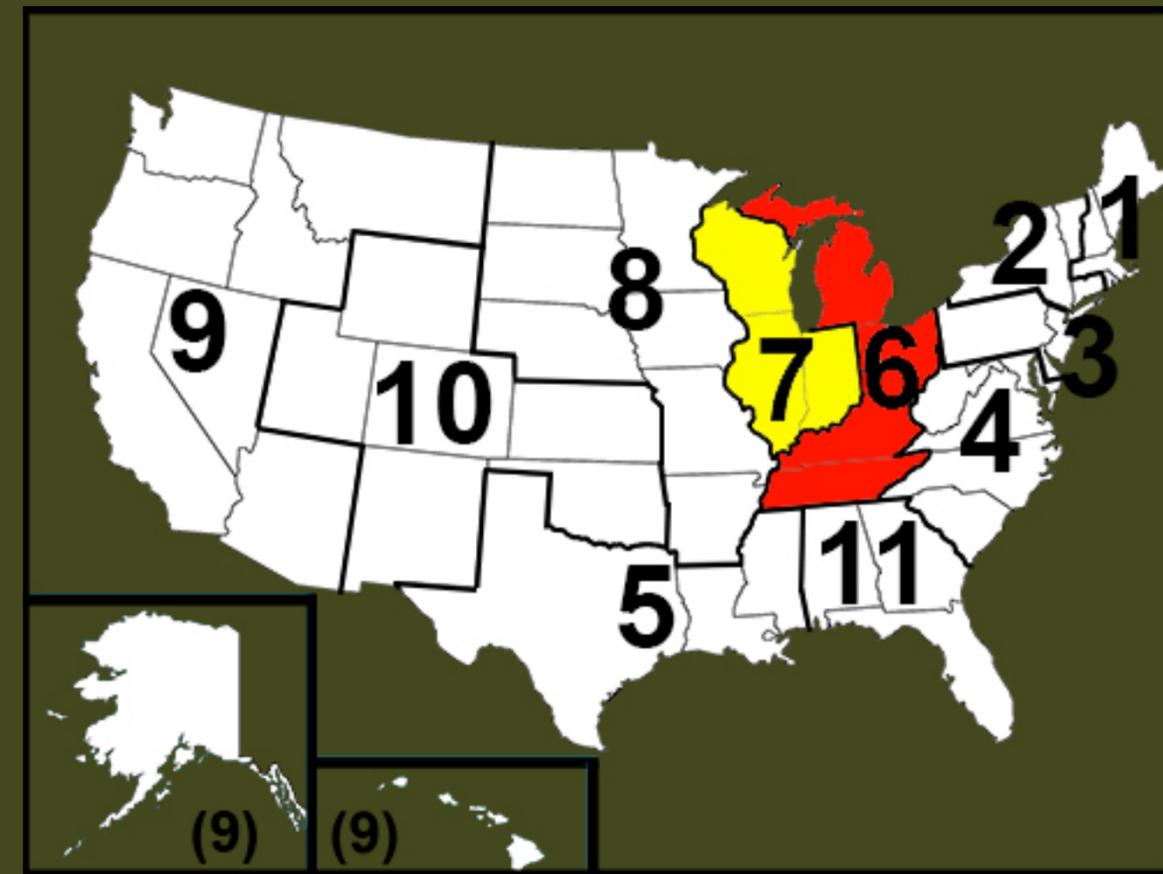
“BART, like any member of the University community, could report a potential Student Code violation to OSCR or the Police without infringing on any student’s right to free speech. ... The mere possibility of a referral does not demonstrate standing.” At 642-643.

Invitations to Meet?

“...[N]othing in the record shows that any individual student fears potential consequences resulting from an invitation to meet with BART, or consequences from declining that invitation, and has self-censored because of those fears... Furthermore, the fact that a majority of students actually decline a meeting supports the conclusion that students do not feel compelled to meet.” At 640.

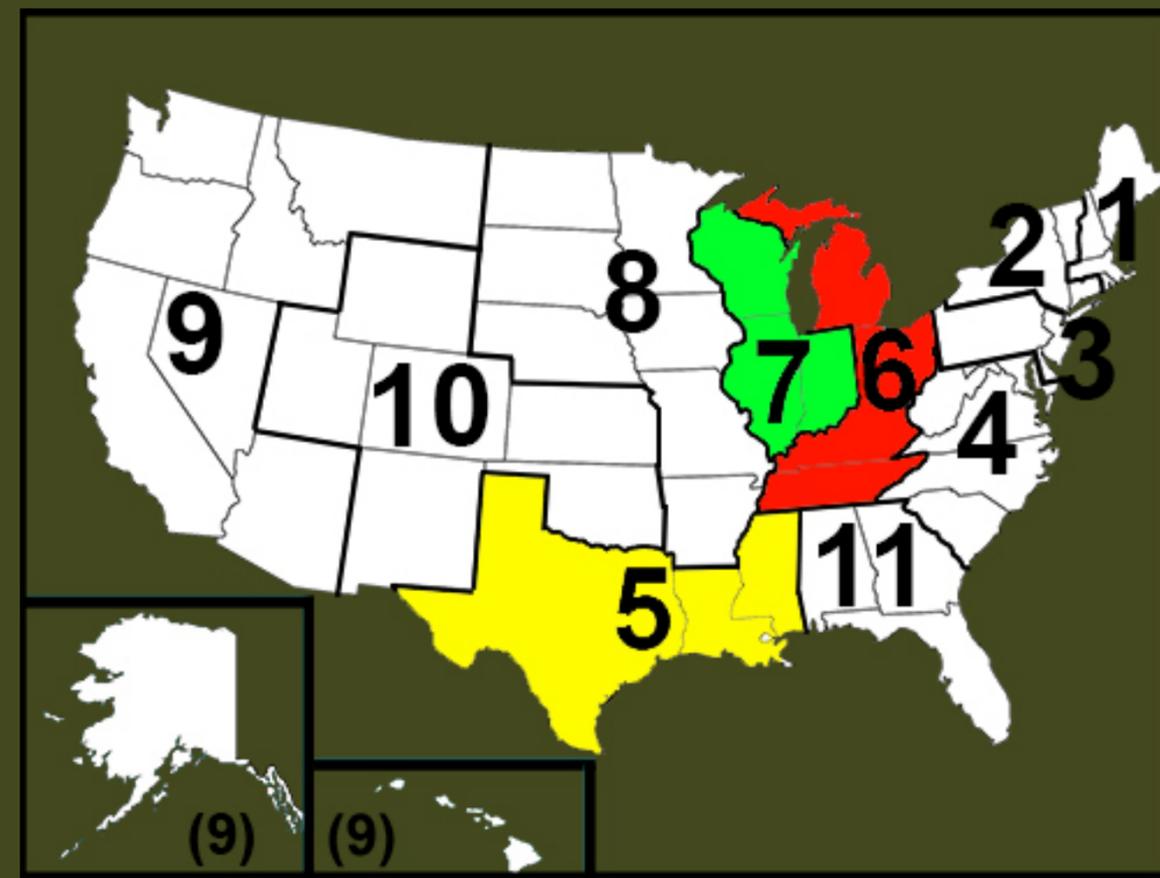
Team Composition?

“While some BART staff are drawn from departments with disciplinary or law enforcement functions, BART has no such functions... BART has no authority to impose sanctions, and BART does not require any student to change his behavior.” At 641, quoting the findings of the district court.



FENVES

979 F.3d 319 (5th Cir. 2020)



Referrals?

"...[W]hen the 'CCRT determines there is a possible violation of the university's institutional rules or policies... the CCRT refers the incident to the appropriate entity.' ... [A] policy thus enforced is sufficiently proscriptive to objectively chill student speech." At 333.

Terminology?

"The CCRT describes its work, judgmentally, in terms of 'targets' and 'initiators' or incidents." At 337.

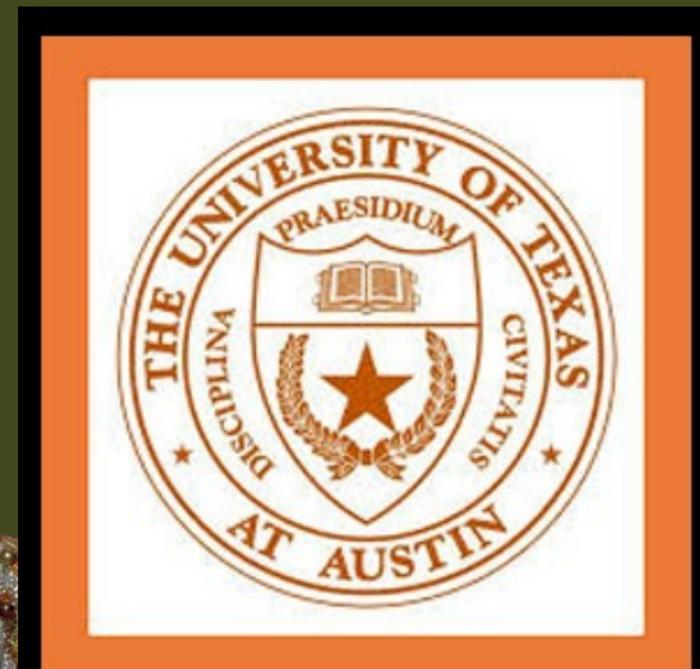
Anonymous Reporting?

"That the CCRT invites anonymous reports carries particular overtones of intimidation to students whose views are "outside the mainstream." At 338.

Memorable Quote?

"The CCRT, in some measure, represents ***the clenched fist in the velvet glove of student speech regulation.***"

At 338 (emphasis added).



Speech First, Inc. v.

CARTWRIGHT

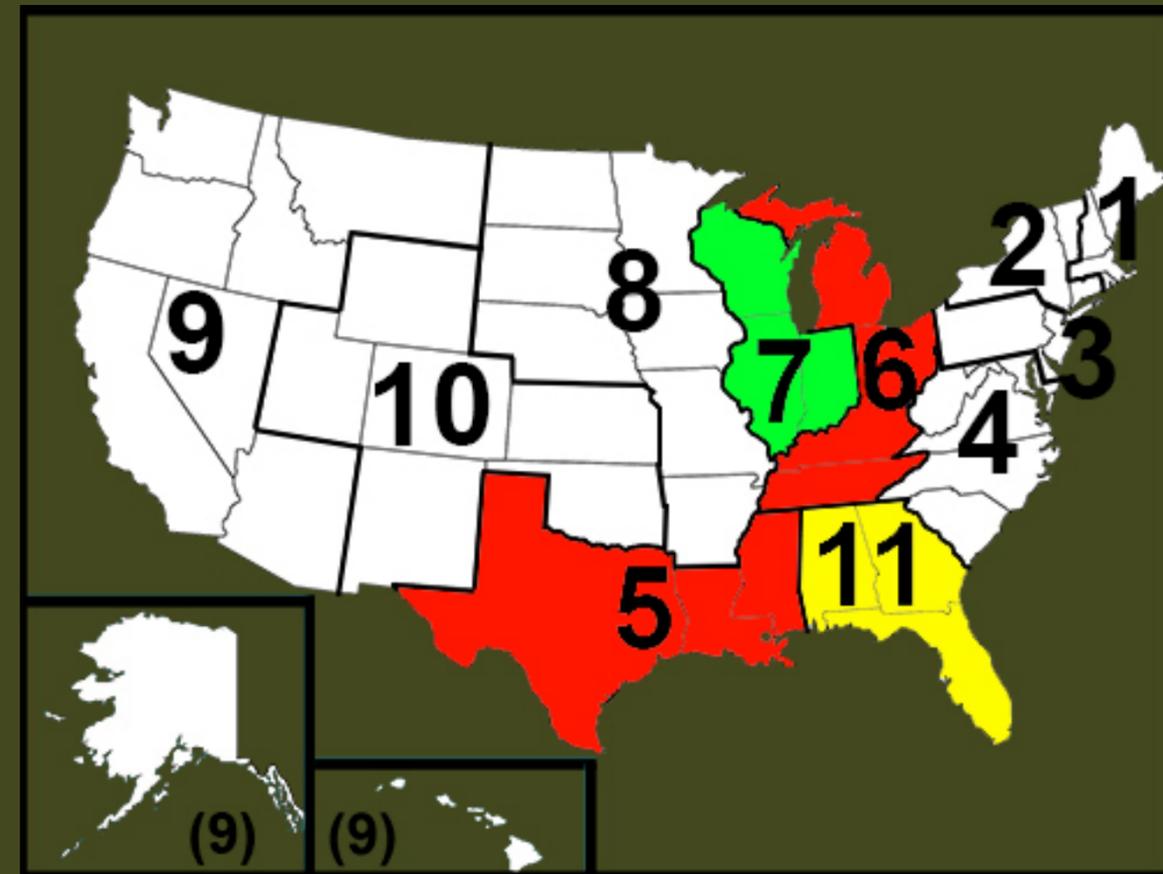
32 F.4th 1110 (11th Cir. 2022)

Terminology?

“No reasonable college student wants to run the risk of being accused of ‘offensive,’ ‘hostile,’ ‘negative,’ or ‘harmful’ conduct – let alone ‘hate or bias.’ Nor would the average college student want to run the risk that the University will ‘track’ her, ‘monitor’ her, or mount a ‘comprehensive response’ against her. ... Pair that broad, vague, and accusatory language with the task-force-ish name of the investigating organization – the Just Knights Response Team – and we think it clear that the average college student would be intimidated, and quite possibly silenced, by the policy.” At 1124.

Invitations to Meet?

“To be clear, the fact that the JKRT’s website once refers to the accused student’s participation as ‘voluntary’ doesn’t change the overall tenor of the message conveyed there – namely, that if your speech crosses our line, we will come after you. **The freedom that a student has to ignore the JKRT process is akin, we think, to the freedom a child has to refuse his parent when she asks, ‘Would you please clean up your room?’**” At 1124, Footnote 5 (internal citations omitted) (emphasis added).



Speech First, Inc. v.

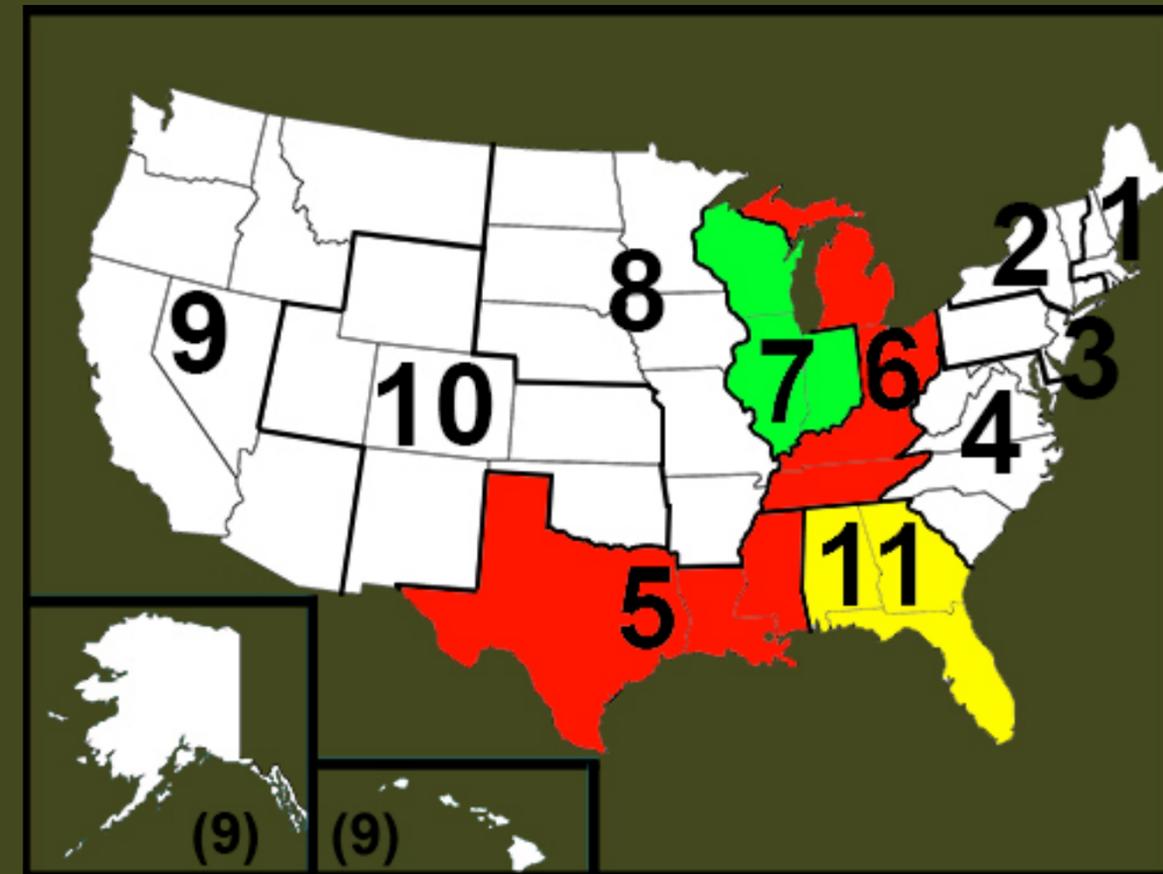
CARTWRIGHT

32 F.4th 1110 (11th Cir. 2022)

Notable Hostility in Fact Recitation

“So... to sum up: The bias-related incidents policy creates a mechanism by which a UCF student can be anonymously accused of an act of ‘hate or bias’ – i.e., an ‘offensive’ act, even if ‘legal’ and ‘unintentional,’ that is directed toward another based on any of a number of characteristics that echo (but do not precisely mirror) those listed in the discriminatory harassment policy. The JKRT ‘monitor[s]’ and ‘track[s]’ bias-related incidents, ‘coordinate[s] university resources,’ marshals a ‘comprehensive response[],’ and where necessary, coordinates ‘interventions’ among affected parties.” At 1118.

Anonymous Reporting, Referrals,
and Team Composition all implicated
in the Court’s factual background.



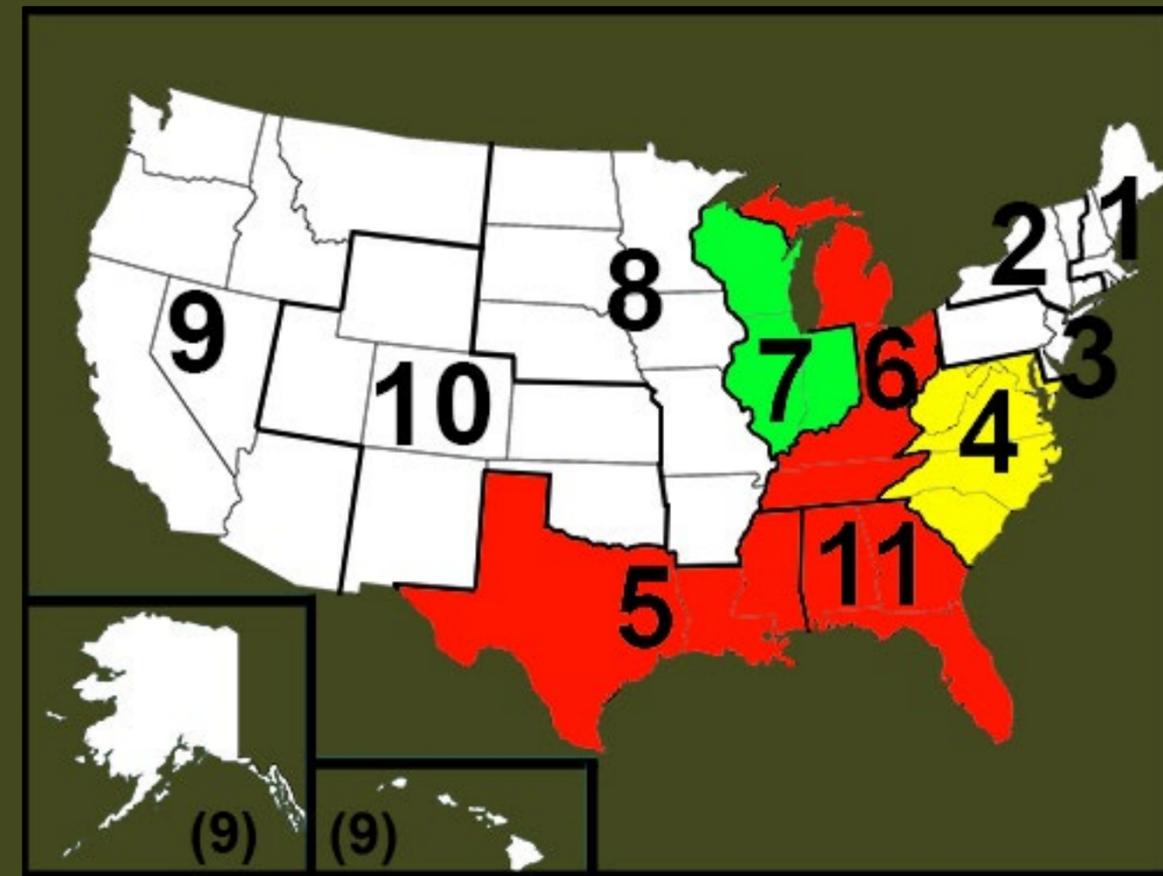
Speech First, Inc. v.

SANDS

69 F.4th 184 (4th Cir. 2023)

Referrals?

“...[I]n truth, the BIRT’s ability to refer matters is neither special nor much of a power. ... ‘BIRT may report a Student Code violation *just like any other member of the Virginia Tech community.*’” At 195 (quoting the district court, emphasis added).



Invitations to Meet?

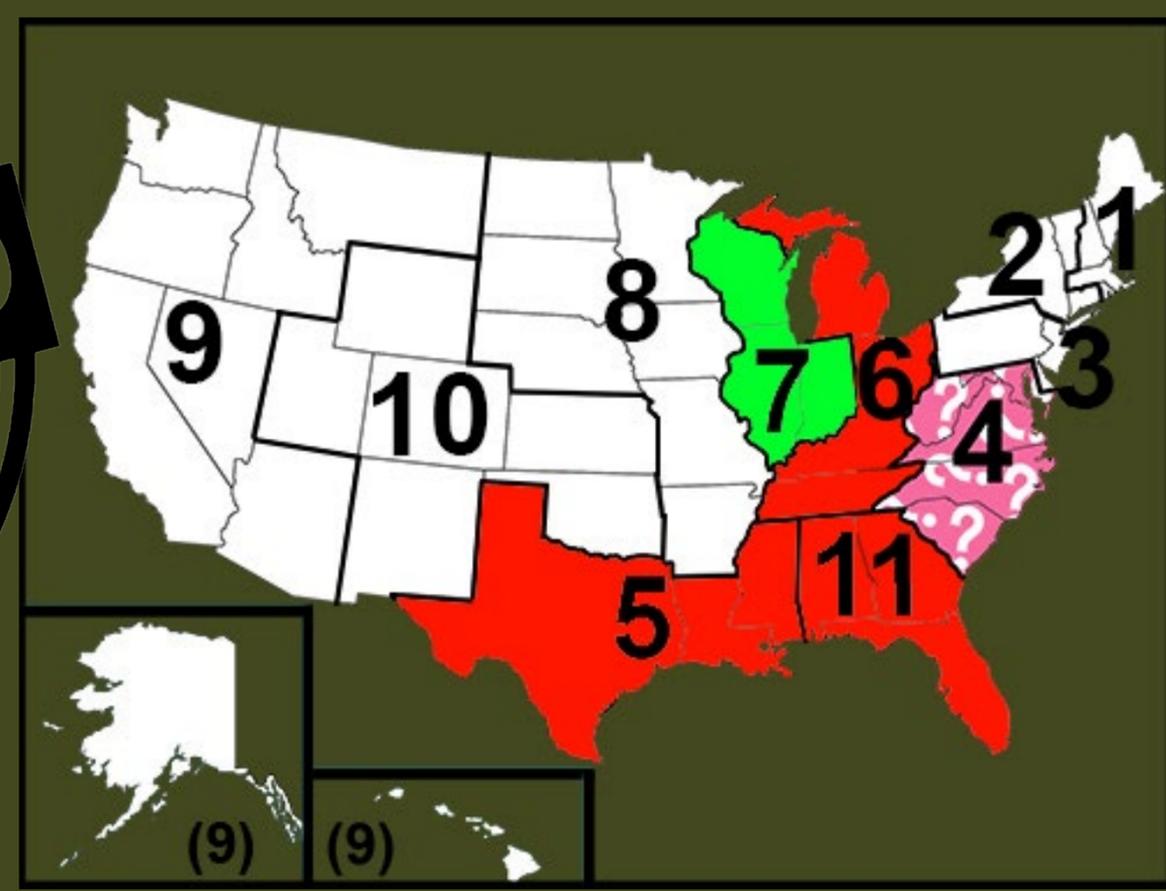
“The district court expressly found that even when the BIRT does extend an invitation to meet, there is ‘no evidence that students feel obligated to come to these voluntary meetings’ with the Dean of Students.”
At 194 (quoting district court).



Speech First, Inc. v.

SANDS

601 U.S. ____ (2024)



Fourth Circuit's Judgment
is VACATED, and the claims
are DISMISSED AS MOOT.



IN DISSENT...

Referrals and Invitations to Meet?

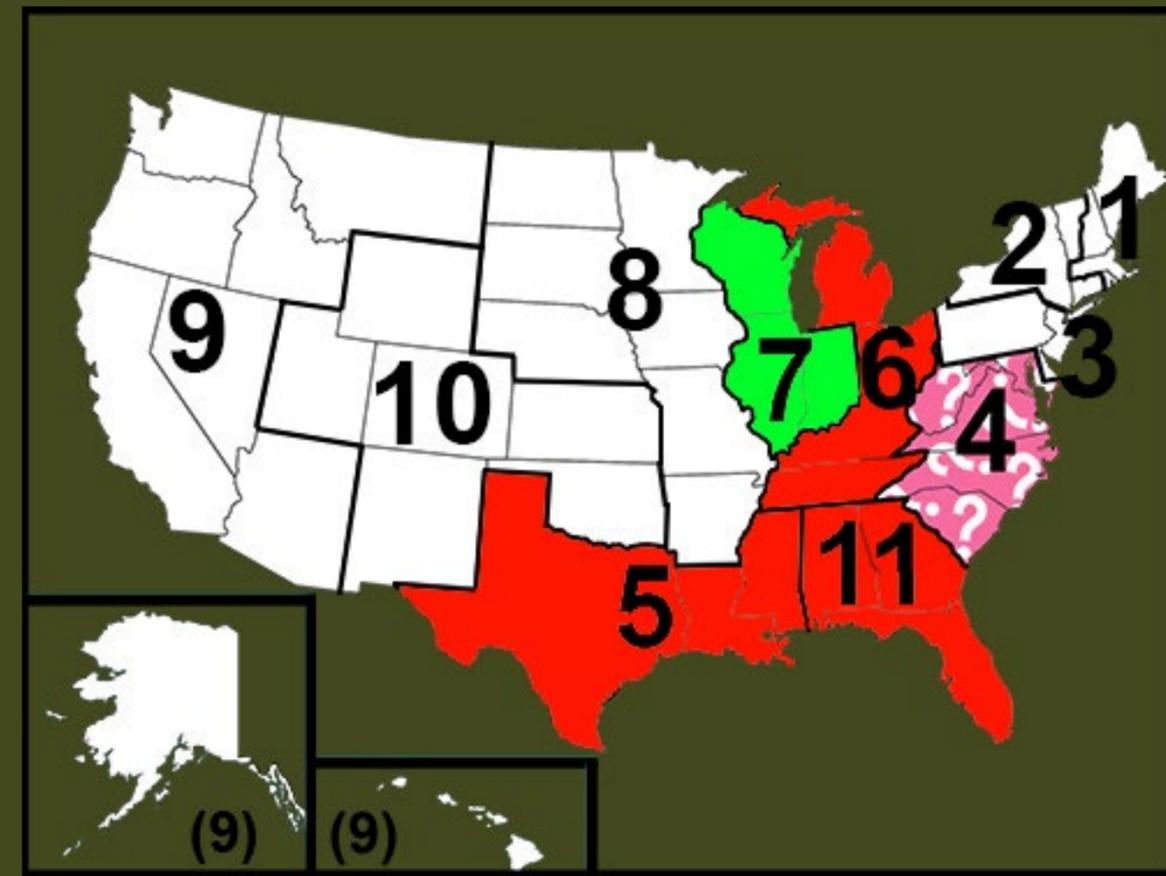
"...[E]ven if the 'perpetrator' is not technically required to accept the team's invitation to meet, it is hard to believe a college student could so easily ignore a university official's request, especially when the report will be filed and 'the referral power lurks in the background of the invitation.'" Quoting *Schlissel*.

Terminology?

"...the accused student – whom the policy pre-emptively labels as the 'perpetrator'..."

Team Composition?

"...[A] report can have weighty consequences. After a report is filed, it goes to the bias response team. The team includes university officials from the Office of the Dean of Students, Office for Equity and Accessibility, Office for Inclusion and Diversity, Student Conduct, and the Virginia Tech Police Department."



Speech First, Inc. v.

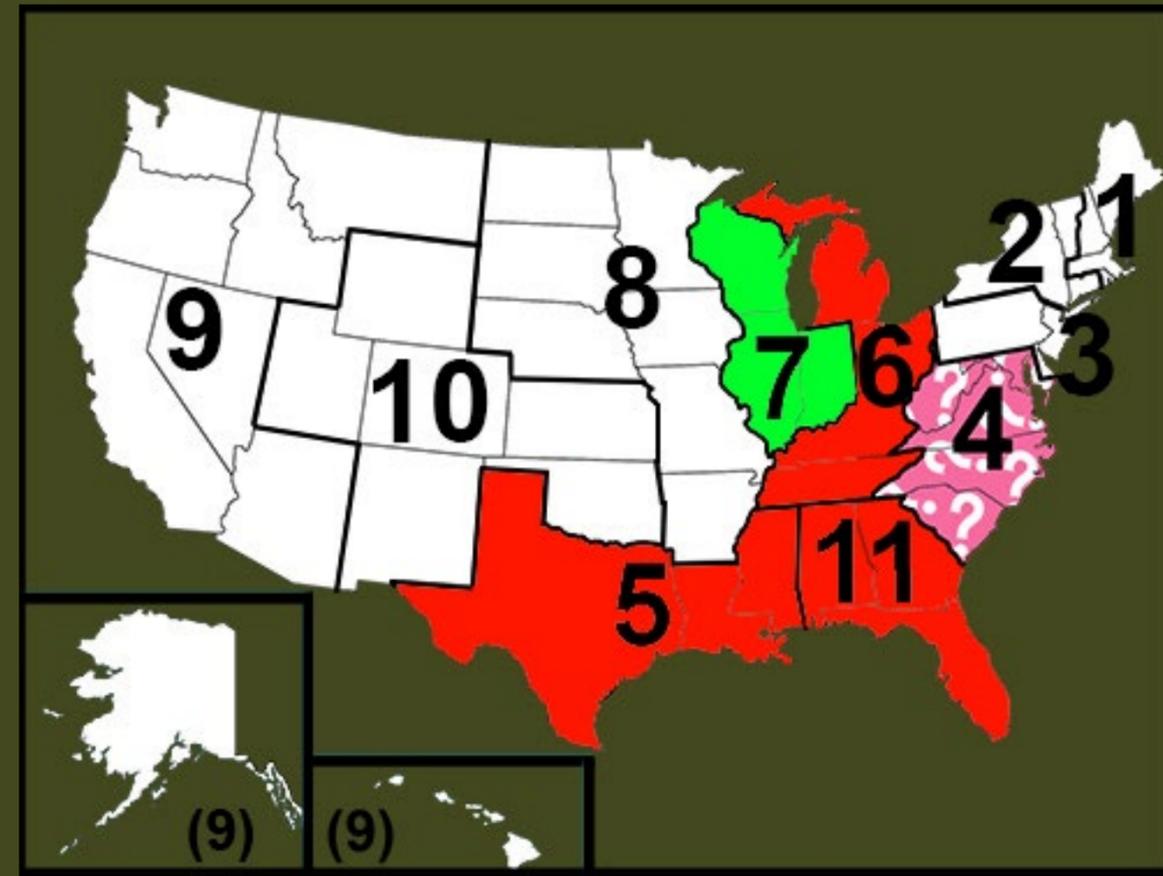
SANDS

601 U.S. ____ (2024)

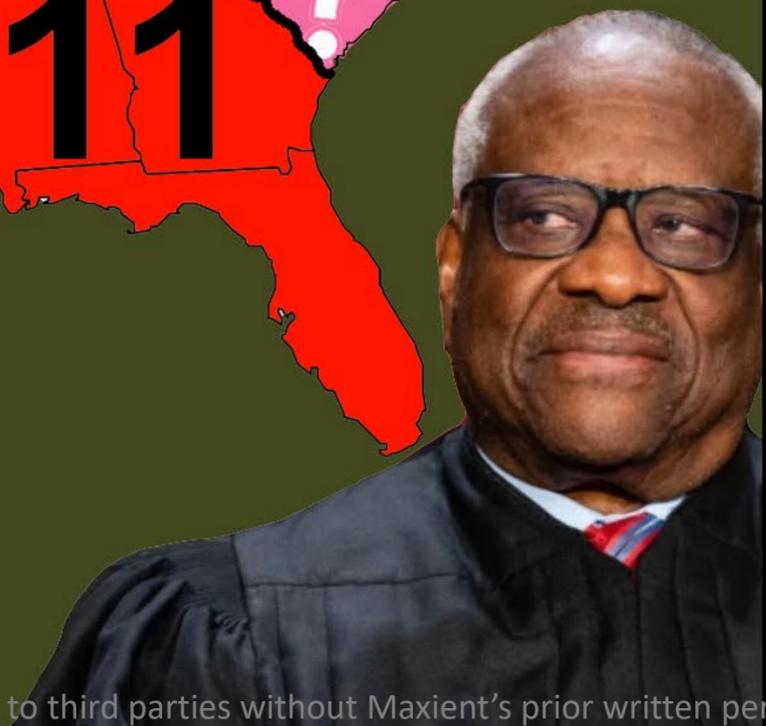
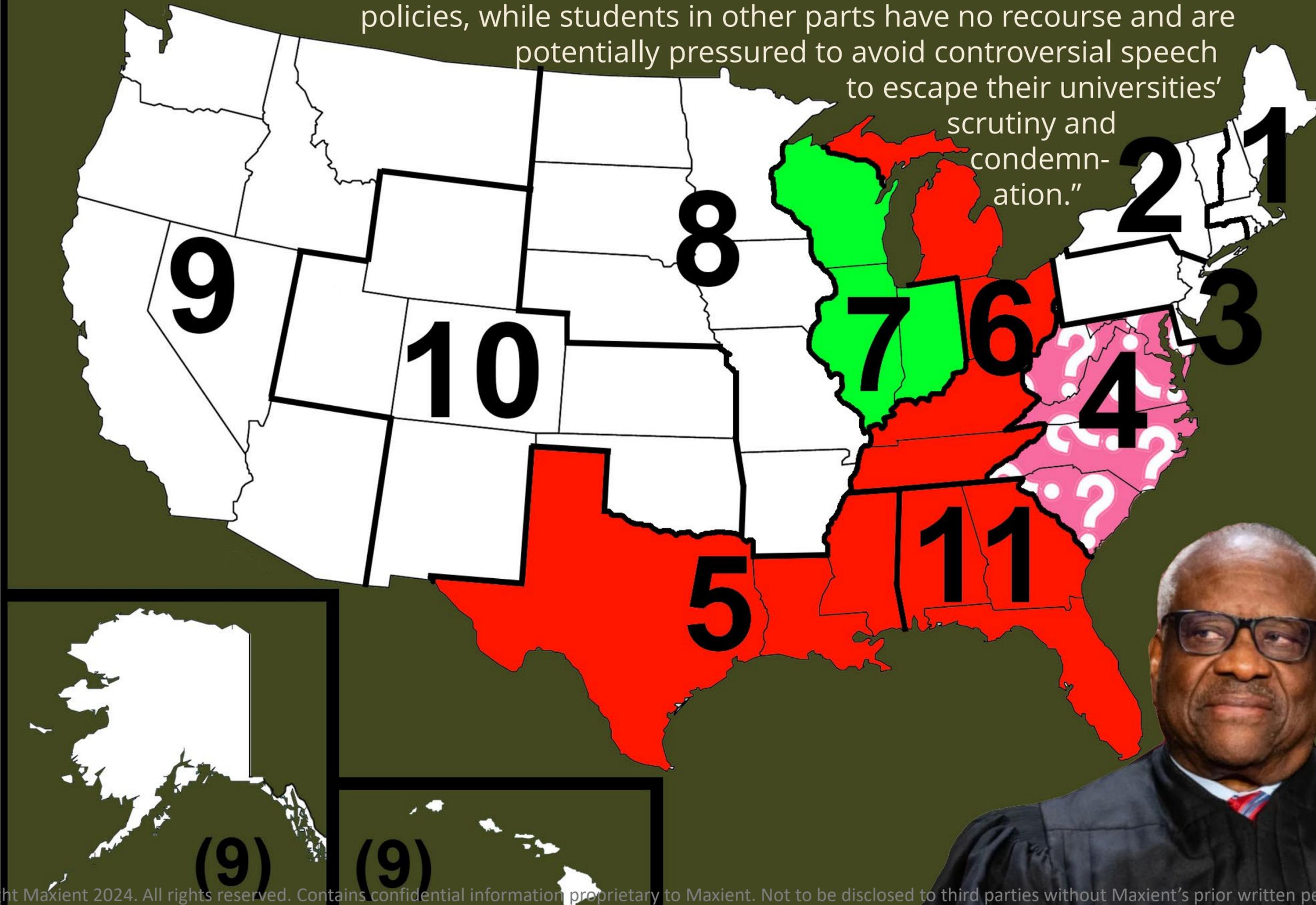
IN DISSENT...

Anonymous Reporting?

“The policy permits anonymous reporting, meaning there is little to no social cost for accusing a classmate of bias.”



“Until we resolve [this], there will be a patchwork of First Amendment rights on college campuses: Students in part of the country may pursue challenges to their universities’ policies, while students in other parts have no recourse and are potentially pressured to avoid controversial speech to escape their universities’ scrutiny and condemnation.”





Maxient System Considerations



Consideration #1 - Your team



What is your team name? What are you known as around campus?



Who makes up your team?
Who on your team has access to Maxient?



Do you have a "Group" set in Maxient?
- Access restrictions



Consideration #2 - Letters



OFFICE OF STUDENT CONDUCT
DIVISION OF STUDENT AFFAIRS

January 25, 2024

Toby Flenderson
Sent electronically to t.flender@maxient.com

January 25, 2024

Dear Toby,

On October 7, 2022, the Office of Student Conduct (OSC) received documentation from Jason K. , regarding your violation of the Smoke and Tobacco Free policy on San Francisco State University's campus.

Per [CSU Executive Order 1108](#), all universities within the California State University system, including San Francisco State University, are Smoke & Tobacco Free. In concert, San Francisco State University is a 100% smoke and tobacco-free campus.

In efforts to build a healthier and more resilient campus community, San Francisco State University has been moving towards being a smoke and tobacco-free campus for many years. This provides faculty, staff, students, guests and the public with a campus that supports one's freedom to learn, teach, work, think and take part in their intellectual endeavors in a fulfilling, rewarding, safe and healthy environment.

What are the benefits of being a smoke and tobacco-free campus?

There are many benefits of being a smoke and tobacco-free campus. Benefits include healthier lungs, heart and immune system for all members of the campus community. There are also environmental effects such as cleaner air and campus environment. Research shows there are behavioral health effects including an increase in individuals who successfully quit, decrease in people who start smoking and supports those who have quit.

While it is your personal decision to smoke and/or use tobacco, the use is not permitted on campus. "Smoke and tobacco-free" includes inhaling exhaling, burning or carrying any lighted or heated:

- Cigar, cigarette, cigarillo or pipe
- Electronic cigarette (e.g. vapes)
- Hookah
- Other tobacco products (e.g. chewing tobacco/snuff)

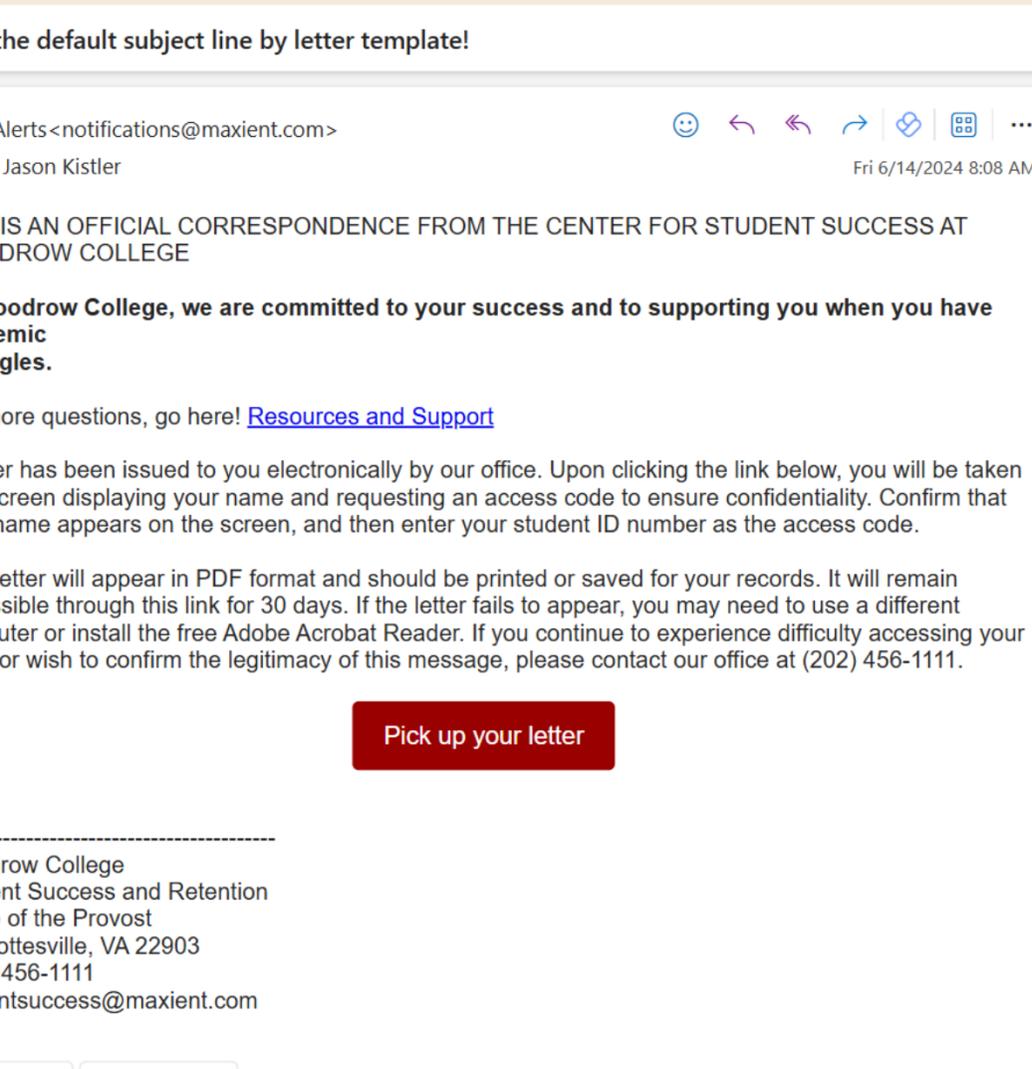
LEADING THE WAY IN STUDENT CONDUCT SINCE 1842

123 MAIN STREET, CHARLOTTESVILLE, VIRGINIA, 22903 434-555-1212

- Expect that all communication from your Maxient system can end up as an exhibit within a court case.
- Is there an implied threat of being investigated?
- Does the recipient believe that a meeting with you is required?



Consideration #2 – Letters (cont.)



- Do not forget that your communication can be more than your letter template!
- Review Manage Offices



Consideration #3 – Reporting and IR Layouts

- Take the temp.... Is there a “chill”?
- Keep in mind this is public facing!



Concerning Behaviors Reporting Form

If you would like to file a report about **concerning behavior** that you have witnessed on campus, please use this form. For behavior you believe may violate the Code of Conduct please make a report [here](#)

Reporter's Information

Please provide us as much detail as you can about yourself and the incident you witnessed.

Your name:

Learn more

Your phone number:



Consideration #4 – System Language

- Your Maxient system is only accessible by your approved users – Manage Users!
- New feature – Manage Case Types!

Default settings

Terminology Lists Fields to Hide or Repurpose

Standard Terminology	Customized Name
Charge	Charge / Issue
Hearing Officer	Administrator
Incident	Incident
Sanction	Sanction / Action

Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

Default Settings

Default settings

Terminology Lists Fields to Hide or Repurpose



Consideration #4 – System Language (cont.)

- New feature – Manage Case Types!
- This will allow you to ensure the language and options in your process are appropriate

Default settings

Terminology Lists Fields to Hide or Repurpose

Standard Terminology	Customized Name
Charge	Charge / Issue
Hearing Officer	Administrator
Incident	Incident
Sanction	Sanction / Action

Manage Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

Default Settings

Default settings

Terminology Lists Fields to Hide or Repurpose

Default settings

Terminology Lists Fields to Hide or Repurpose

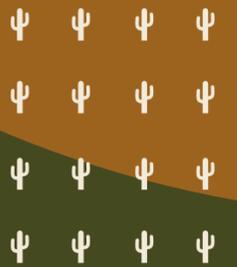
Item	Available Options
Appeal Statuses	No appeal filed; Appeal received; Approved; Denied; another here; one more reason here
Classifications	Freshman; Sophomore; Junior; Senior; Graduate;



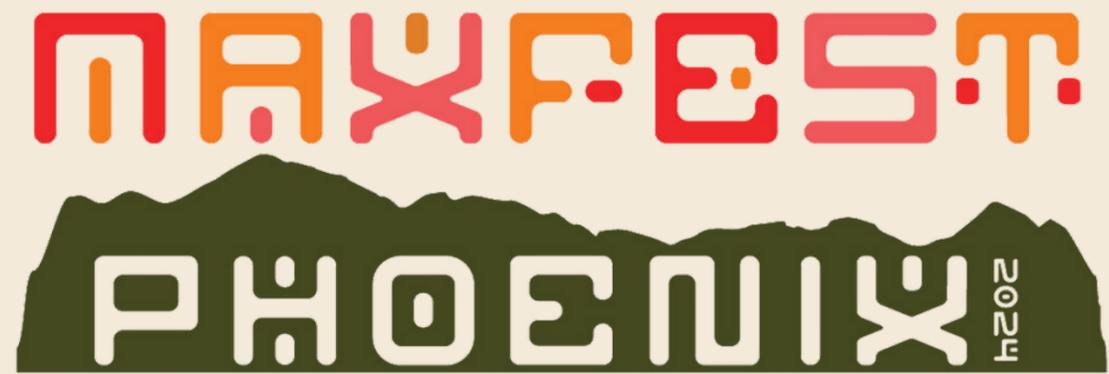
Questions?



Thank You!



Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.



But did you document it?

Using Maxient for Human Resources Processes



Michael J. Ginsburg
Client Success Advisor

Agenda

- Sharing vs. separate systems
- Manage Case Types
- Access Restrictions
- Charges / Issues of Concern
- Sanctions / Actions
- Configuration considerations
- Adding employees to the Demographics file

> Sharing vs. Using Separate Systems



Sharing vs. Separate Systems

- How many of you use Maxient for Employee cases?
 - How many share a system with other areas?
 - How many use you a separate system?
- Benefits of sharing
- Benefits of a separate system

Sharing vs. Separate Systems

- Everything is tracked
 - Audit trail by File and Case
 - System Log (level 5 only)
 - User Activity (level 5 only)

System Log = Big Picture



**Queen City College
Case Manager**
Thursday May 4, 2023

User: Jean-Paul Sartre
Access Level: 5



- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find Priors / History
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Manage watchlist

Logs

Select log to view

System Log

System Log

The system log format changed effective January 2018, so its appearance will vary slightly depending on the time period selected.

Select Month to View

May 2023 Go

The information contained on these pages is privileged and confidential information intended solely for the individual or entity who has accessed it for official purposes and by lawful means. Any dissemination, distribution, or copy of this communication is strictly prohibited. If you have received this communication in error, please immediately notify us by telephone at (434) 295-1748, and return the original message to us via the U.S. Postal Service at Queen City College, Student Center Suite 450, Charlottesville, VA 22903, without retaining a copy.

Logs

System Log = Big Picture



**Queen City College
Case Manager**
Thursday May 4, 2023

User: Jean-Paul Sartre
Access Level: 5



- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find Priors / History
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Manage watchlist
- Logs

Select log to view

Select item to view

System Log for May 2023 ...

Print Copy CSV Excel PDF

Search:

DATE AND TIME	ACTIVITY
2023-05-01 07:53:12	Login attempt for jpsartre successful from 67.149.60.96.
2023-05-01 07:53:27	jpsartre logged out from 67.149.60.96.
2023-05-01 15:39:55	Login attempt for maxient successful from 67.149.60.96.
2023-05-01 15:40:08	maxient logged out from 67.149.60.96.
2023-05-02 10:20:55	Login attempt for jpsartre successful from 67.149.60.96.
2023-05-02 12:10:26	jpsartre logged out from 67.149.60.96.
2023-05-02 15:00:19	Login attempt for unauthorized user UNSUCCESSFUL from 67.149.60.96.
2023-05-02 15:00:22	Login attempt for jpsartre successful from 67.149.60.96.
2023-05-02 15:53:45	jpsartre logged out from 67.149.60.96.
2023-05-02 15:56:33	Login attempt for unauthorized user UNSUCCESSFUL from 67.149.60.96.
2023-05-02 15:56:36	Login attempt for jpsartre successful from 67.149.60.96.
2023-05-02 15:57:25	jpsartre logged out from 67.149.60.96.
2023-05-04 09:50:21	Login attempt for jpsartre successful from 67.149.60.96.

User Activity



Incoming Reports

Create New Case

Complete CRF

Update Existing Case

Find Case

Find Priors / History

Letters

Analytics

Administrative

Manage users

Manage groups

Manage charges

Manage sanctions

Manage tasks

IR Layouts

Manage letters

Manage analytics

Manage offices

Configuration

Manage watchlist

Logs

Logs

Select log to view

User Activity

User Activity

Select from any current user, or specify a username to find records for an account that no longer exists. All user activity searches will appear in the system log.

Select Username

Jean-Paul Sartre (jpsartre)

Start Date

2023-04-27

End Date

2023-05-04

Go

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User Activity



**Queen City College
Case Manager**
Thursday May 4, 2023

User: **Jean-Paul Sartre**
Access Level: 5



- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find Priors / History
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Manage watchlist
- Logs**

Logs

Select log to view

Select item to view

Activity log for Jean-Paul Sartre (jpsartre) ...

Below is all case-level audited activity for the user. Activities traditionally found in the system log (e.g. logins, logouts, running analytics) which occurred after January 1, 2018 are also shown.

Print Copy CSV Excel PDF

Search:

DATE AND TIME	IP ADDRESS	FILE ID	ACTION
2023-04-27 14:26:43	67.149.60.96		Login attempt for jpsartre successful from 67.149.60.96.
2023-04-27 14:27:35	67.149.60.96		jpsartre logged out from 67.149.60.96.
2023-05-01 07:53:12	67.149.60.96		Login attempt for jpsartre successful from 67.149.60.96.
2023-05-01 07:53:27	67.149.60.96		jpsartre logged out from 67.149.60.96.
2023-05-02 10:20:55	67.149.60.96		Login attempt for jpsartre successful from 67.149.60.96.
2023-05-02 12:10:26	67.149.60.96		jpsartre logged out from 67.149.60.96.
2023-05-02 15:00:22	67.149.60.96		Login attempt for jpsartre successful from 67.149.60.96.
2023-05-02 15:00:30	67.149.60.96	2022002302	Case record accessed on Update Existing Case screen
2023-05-02 15:53:45	67.149.60.96		jpsartre logged out from 67.149.60.96.
2023-05-02 15:56:36	67.149.60.96		Login attempt for jpsartre successful from 67.149.60.96.
2023-05-02 15:57:25	67.149.60.96		jpsartre logged out from 67.149.60.96.
2023-05-04 09:50:21	67.149.60.96		Login attempt for jpsartre successful from 67.149.60.96.
2023-05-04 09:56:40	67.149.60.96		User activity logs for jpsartre from 2023-04-27 through 2023-05-04 viewed by Jean-Paul Sartre

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Manage Case Types



Manage Case Types

- ADD INFO AND SCREENSHOTS





Access Restriction Groups



Access Restriction Groups

- What are they and what do they do?
- Who sees what?
 - Access (User) Level vs. Access Restriction
- Level 5 users notified when additions made to Groups
 - Make sure In-System Notification turned on in Account Settings



Manage Groups



Incoming Reports

Create New Case

Complete CRF

Update Existing Case

Find Case

Find Priors / History

Letters

Analytics

Administrative

Manage users

Manage groups

Manage charges

Manage sanctions

Manage tasks

IR Layouts

Manage letters

Manage analytics

Manage offices

Configuration

Manage watchlist

Logs

Manage Groups > Overview

EDIT	GROUP ID	NAME	DESCRIPTION
Edit	20	Title IX - Employee Cases	Title IX Cases involving employees (faculty/staff).
Edit	16	Title IX - Confidential	Title IX reports that require additional confidentiality due to the nature of the incident or individuals involved.
Edit	19	Title IX - Conduct	All cases involving gender-based equity concerns move to this group during adjudication.
Edit	14	Title IX	All cases involving gender-based equity concerns start in this group.
Edit	2	Students of Concern	Multidisciplinary group that helps to ensure the well-being of the campus community
Edit	21	Student Complaints	
Edit	13	Records Requests	Cases assigned to this group involve records requests (Student-initiated, Background Checks, Dean's Certifications, Open Records, etc.).
Edit	25	Employee Relations	
Edit	27	Early Alert	
Edit	29	Disability Services	
Edit	26	Community Health Cases	
Edit	28	BIRT	Reports of bias occurring on campus.
Edit	5	Academic Integrity	Academic Integrity case managers.

Manage Groups



**Queen City College
Conduct Manager**
Tuesday May 31, 2022

Manage Groups > Edit Group

ID
This value is set automatically by Maxient.

NAME

DESCRIPTION

DEFAULT MESSAGE ON CASES
This message will be used as the "Access Restriction Description", shown on all cases belonging to this group.

This case is access restricted. For more information, please contact a Maxient Level 5 user.

Check here to update this message across all cases that belong to this group

MEMBERSHIP
Select the members of this group.

- Gertrude Stein, Dean of Imagination
- Jean-Paul Sartre, Associate Dean of Students
- Kurt Vonnegut , Chair, CARE Team
- Toni Morrison, Director of Student Conduct

- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find Priors / History
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Manage watchlist
- Logs

In-System Notification

Queen City College Conduct Manager

Tuesday May 31, 2022

User: Jean-Paul Sartre

Access Level: 5



Notifications

[Learn more](#)

Show entries

Search:

Related to	Date	Details	Initiated By	Unread <input type="checkbox"/>	<input type="checkbox"/>
Group 5	February 9, 2022 10:57 am	Addition to group Academic Integrity (id: 5) Jean-Paul Sartre (jpsartre) added	Maxient Staff Account	<input type="checkbox"/>	<input type="checkbox"/>
IR 00000276	February 9, 2022 9:43 am	New IR assigned to you		<input type="checkbox"/>	<input type="checkbox"/>
Group 14	January 12, 2022 10:41 am	Addition to group Title IX (id: 14) Jean-Paul Sartre (jpsartre) added	Maxient Staff Account	<input type="checkbox"/>	<input type="checkbox"/>
Group 19	June 17, 2021 12:17 pm	Addition to group Title IX - Conduct (id: 19) Amy Farrah Fowler (afowler) added	Amy Farrah Fowler	<input type="checkbox"/>	<input type="checkbox"/>
Group 5	May 10, 2021 12:50 pm	Addition to group Academic Integrity (id: 5) Cathy Comfort (ccomfort) added	Dr. Seuss	<input type="checkbox"/>	<input type="checkbox"/>
Group 14	April 12, 2021 11:59 am	Addition to group Title IX (id: 14) Amy Farrah Fowler (afowler) added	Amy Farrah Fowler	<input type="checkbox"/>	<input type="checkbox"/>

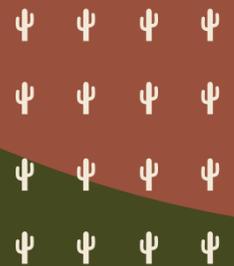


Charges and Issues of Concern



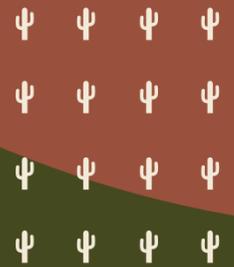
Example Issues of Concern

- Accommodation Request - Alternate Schedule
- Accommodation Request - Equipment/Software Needs
- Accommodation Request - Breaks
- Accommodation Request - Light Duty
- Accommodation Request - Location Change
- Accommodation Request - Parking
- Accommodation Request - Reduction in Hours



Example Charges

- Interpersonal Conflicts – Co-Worker
- Interpersonal Conflicts – Supervisor
- Interpersonal Conflicts - Student





Sanctions and Actions



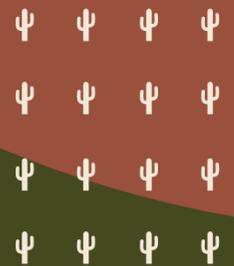
Example Sanctions and Actions

- Backpay
- No Backpay
- Change of Supervisor
- Job Transfer
- Performance Improvement Plan
- Training



Example Sanctions and Actions

- Reprimand
- Probation
- Work Location Change
- Suspension with Pay
- Suspension without Pay
- Termination



What it looks like on CRF

Employee Relations

Warning

Performance Improvement Plan

Employee Coaching

SESSION_NUM

STAFF_NAME

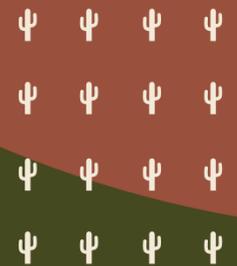
FIRST_SESSION_DATE (YYYY-MM-DD)

Facilitated Dialogue

Suspension with Pay

Suspension without Pay

Termination



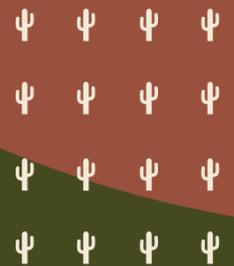


Configuration Considerations



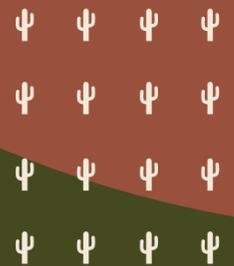
Configuration

- Case Types and Subsets
 - Employee Relations
 - Employee Discipline
 - Title VII, Title VI, or Bias Incident
 - Title IX – Employee
 - The last one needs to be listed in *Case Types* and *Case Type Subset Representing Title IX areas*



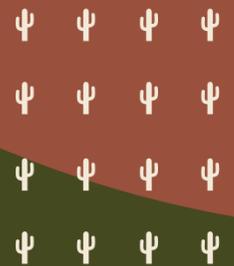
Configuration

- CC Recipient List
 - People copied frequently on correspondence
- Classifications
 - Employee
 - Faculty
 - Staff
 - Job Titles / Classifications



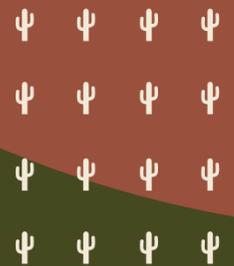
Configuration

- Findings
 - Founded and Unfounded
 - Also add to *Finding – Term for Responsible* if it means involved party is responsible for Charge
- Hearing Officer Titles
 - Assigned to users who manage cases



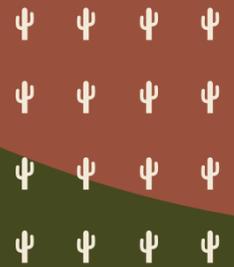
Configuration

- Incident Locations
 - Offices
 - Departments
- Milestones
 - Documents significant dates/steps in your process



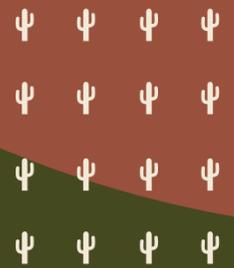
Configuration

- Note Categories
 - Consultation
 - Email
 - Meeting
 - Phone Call
 - Referral
 - Walk-in



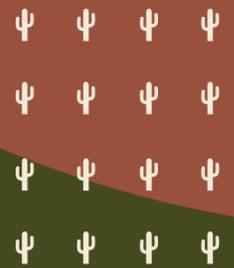
Configuration

- Referral Sources
 - Co-Worker
 - Employee
 - Supervisor



Configuration

- Resolution Type
 - Employee Formal
 - Employee Informal
 - Grievance Formal
 - Grievance Informal



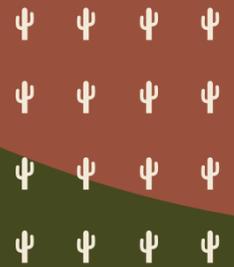
Configuration

- Roles
 - Co-Worker
 - Supervisee
 - Supervisor
 - Witness



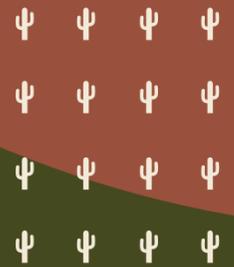
Configuration

- Statuses
 - Open
 - Documentation Review
 - Pending Outcome Completion
 - Closed



Configuration

- Tags
 - Collective Bargaining Unit
 - Legal Representation
 - Union Representation



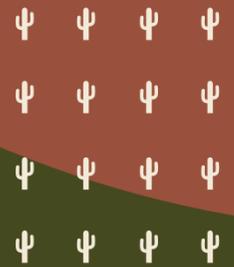


Adding Office(s)



Manage Offices

- What offices might you need?
 - Employee Benefits
 - Employee Relations
 - Human Resources
- Why you want them
 - Analytics
 - Correspondence



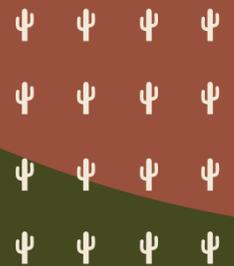


Adding Employees to Demographic File



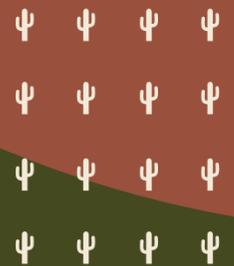
Demographics File

- Employees must be sent in same file as students
- What to send for employees
 - SID
 - Authentication Token
 - Name
 - DOB (if also a student for Clery reporting)
 - Campus location / contact info in Local Address and Phone fields



Demographics File

- What to send for employees
 - Job Title or Group as Classification
 - Home Department in Academic Major field
 - Supervisor Name in Academic Advisor field
- OTHER fields
 - What are they and what can you send?



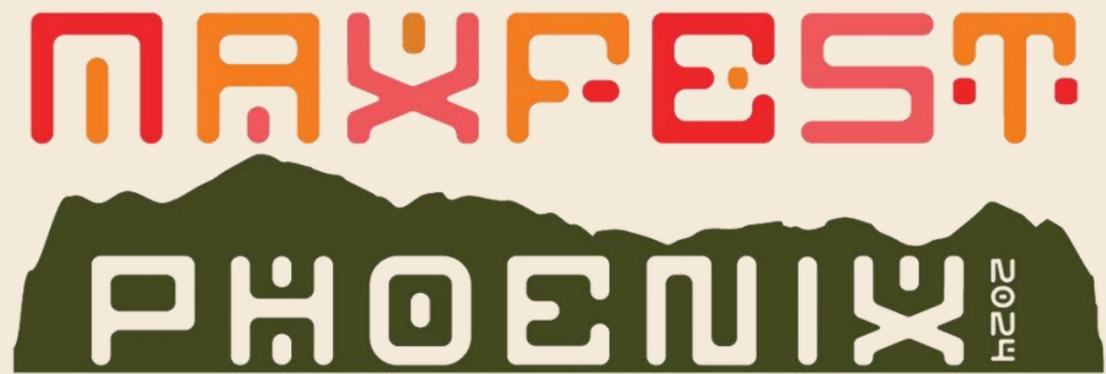


Questions?



Thank You!





CARE-ing for Students BIT by BIT



Sarah Koukal
Director of Client Support

Agenda

**Configuring
Your System**

**Receiving
Reports and
Creating
Cases**

**Case
Management**

**Resolving
and Closing
Cases**



CONFIGURING YOUR SYSTEM

Configuring Your System: Type & Status

CASE TYPES

- > CARE, BIT, BAT, TAT
- > Keeps your cases separate from other processes
- > Particularly helpful for reporting through analytics

STATUSES

- > Different levels of monitoring
- > High Monitor
- > Low Monitor

Configuring Your System: Tags

TAGS

Allows you to track cases that are not CARE, but may have been discussed at CARE

- Review for CARE
- For CARE Team Review

Configuring Your System: Risk Level

The NaBITA risk rubric is available for use

- Turned on via the Configuration Screen
- When turned on, it is visible on the Create New Case and Update Existing Case screens

NABITA RISK RUBRIC ENABLED

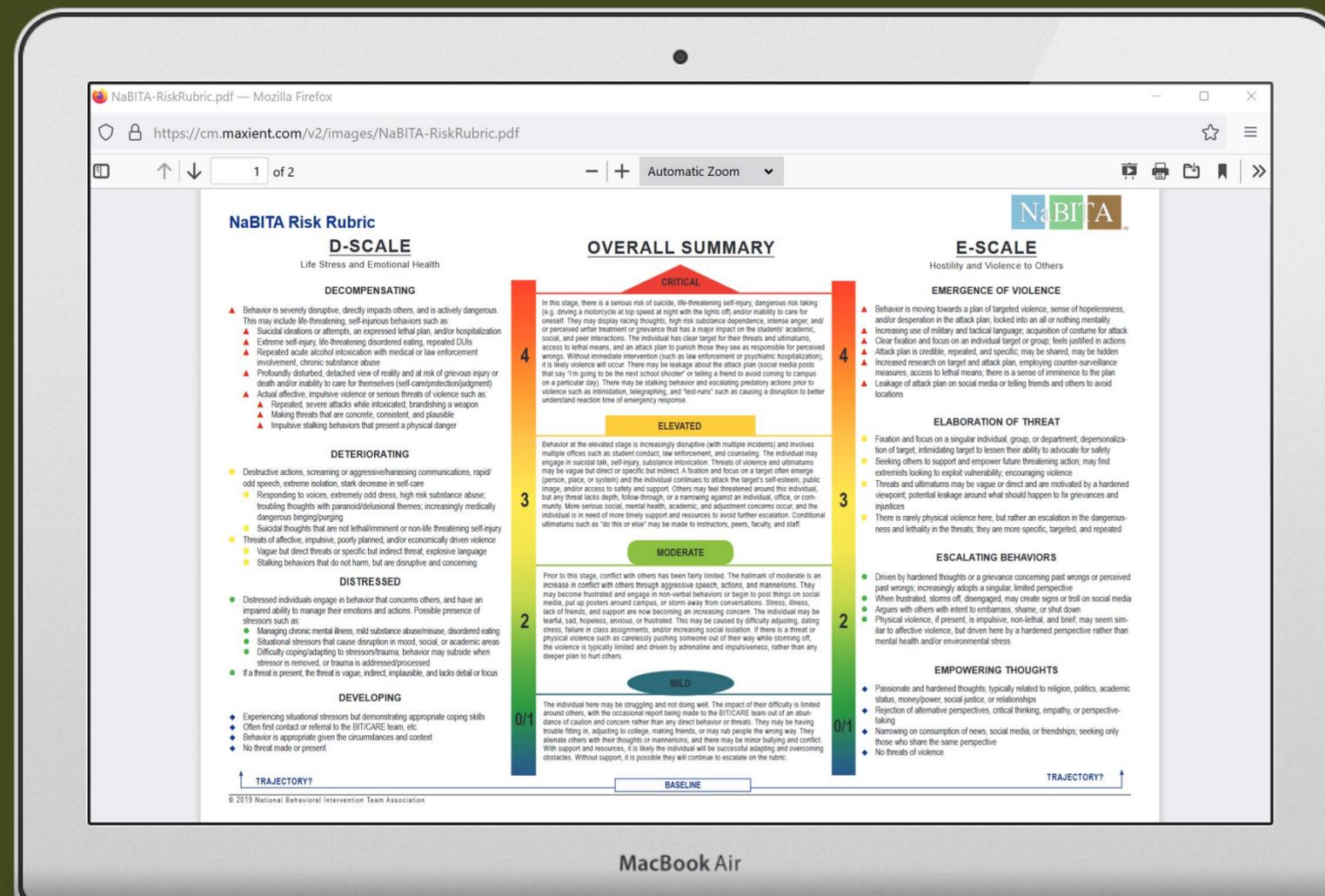
If enabled, the NaBITA Risk Rubric will be available for reference when creating or updating a case.

Yes No

Configuration
Screen

Configuring Your System: Risk Level

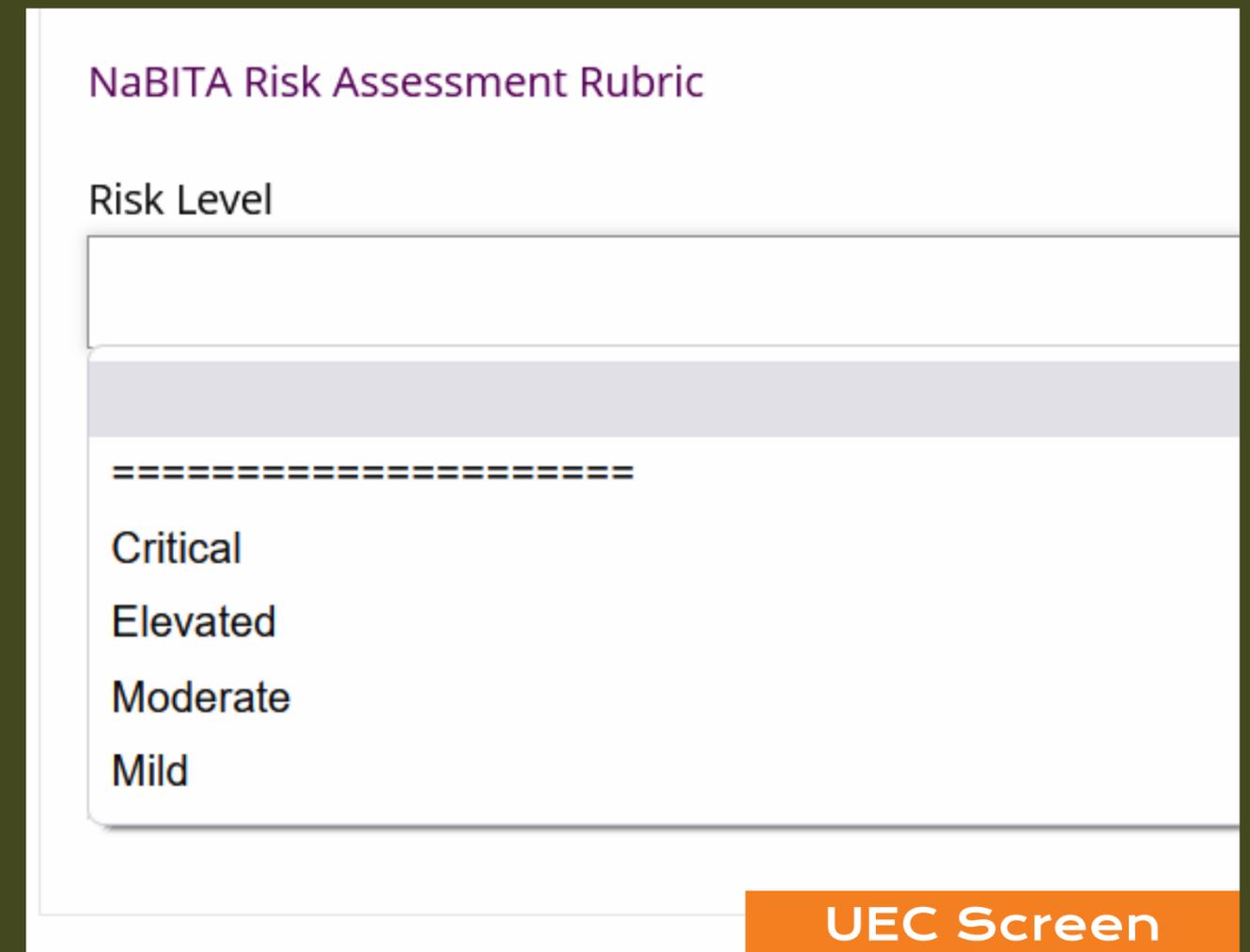
The NaBITA rubric in your system appears as a pop-up window:



Configuring Your System: Risk Level Dropdown

If you use the NaBITA risk rubric or another threat assessment rubric, we may be able to set up a **risk level tracking box**

- Indicates the level at which the person is currently assessed
- Particularly helpful for prioritizing cases



The screenshot displays a configuration interface for the NaBITA Risk Assessment Rubric. At the top, the title "NaBITA Risk Assessment Rubric" is shown in purple. Below it, the label "Risk Level" is positioned above a dropdown menu. The dropdown menu is currently open, showing a list of risk levels: "Critical", "Elevated", "Moderate", and "Mild". A horizontal dashed line is visible above the list items. The interface is clean and modern, with a white background and a light gray border. In the bottom right corner, there is an orange button labeled "UEC Screen".

Configuring Your System: Risk Level Milestones

Used to track Risk Level over time (*vs. just current Risk Level*)

- Created via the Configuration screen

MILESTONES

List of milestones available for addition to cases. One per line, semi-colon delimited.

Configuration
Screen

```
====CARE Use Only====;  
Mild;  
Moderate;  
Elevated;  
Critical;  
New Incident
```

Configuring Your System: Risk Level Milestones

Used to track Risk Level over time

- Apply them on the "Case" tab on the Update Existing Case screen

Update Existing Case

2019000101 Dwight Kurt Schrute (777777777)

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS NOTES OTHER

Existing Milestones

No milestones have been marked in this case.

Description Date Time

05 / 25 / 2022 03:16 PM

CARE Use Only

Mild

Acces: Moderate

No Elevated

Acces: Critical

Acces: New Incident

Update Existing Case Screen

Configuring Your System: Risk Level Milestones

Pull a “sparkline” in analytics to show risk level over time:

File ID	Status	SID	Photo	Case Created Date	First Name	Last Name	Assigned To - Name	Charges/ Issues	Current Risk Level	Risk Level Trend	Incident Summary	Timeline
2023000502	High Monitor	987654011		2024-02-26	Kelly	Kapoor	Amy Farrah Fowler	Depression Withdrawal from social groups	Mild		Has not come to class for three weeks and told RA cannot get out of bed and wants to sleep.	Timeline
2021000901	Low Monitor	987654004		2023-05-09	Phyllis	Lapin-Vance	Dr. Seuss	Heightened Emotional Distress Hostility	Moderate		Student had emotional outburst in faculty member's office.	Timeline

Configuring Your System: Issues

Much like charges in conduct cases, issues address **specific behavioral concerns**

- Most CARE Issues of Concern won't need expanded language on the Charges/Issues screen

Edit	Behavioral Concern	Aggression	Aggression
Edit	Behavioral Concern	Anxiety	Anxiety
Edit	Behavioral Concern	Bizarre behavior	Behavior that is inconsistent with expectations.
Edit	Behavioral Concern	Depression	Depression
Edit	Behavioral Concern	Disordered Eating	Disordered Eating
Edit	Behavioral Concern	Disturbed Writing	Disturbed Writing
Edit	Behavioral Concern	Heightened Emotional Distress	Heightened Emotional Distress
Edit	Behavioral Concern	Hostility	Hostilities

[Manage Charges Screen](#)

Configuring Your System: Issues

You can limit who has access to what Charges/Issues

- Select on a user-by-user basis via Manage Charges or Manage Users

WHO HAS ACCESS?
Checkmark the users and/or groups who should have access to apply this charge/issue in cases.

Users

- Amy Farrah Fowler, Residence Hall Director, Capstone House
- C.S. Forester, Assistant Director of Judicial Affairs
- C.S. Lewis, Dean of Academic Affairs
- Campus Judicial Board, Campus Judicial Board
- Captain Accountability, Senior Associate Dean of Students for Comm Standards and New Initiatives
- Cathy Comfort, Director of Counseling
- Dr. Seuss, Dean of Students
- Edgar Allen Poe, Associate Dean of Students
- F. Scott Fitzgerald, Residence Hall Director - Tucker House
- George Orwell, Coordinator of Judicial Affairs/Student Conduct
- Gertrude Stein, Dean of Imagination

BEHAVIORAL CONCERN

- Aggression
- Anxiety
- Bizarre behavior
- Depression
- Disordered Eating
- Disturbed Writing
- Heightened Emotional Distress
- Hostility
- Mood Swings/Intense Emotional Outbursts
- Suicidal Ideation

Manage Charges Screen

Manage Users Screen

General Privileges Communication Analytics **Charges/Issues** IR Layouts Letters Forms Sanctions/Actions

Configuring Your System: Issues

Charges/Issues Access ALSO can be added via Manage Groups

- If charges are assigned based on Group Membership, they will be underlined with a dashed line on the Manage Users screen

MEMBERSHIP
Select the members of this group.

- Amy Farrah Fowler, Residence Hall Director, North Los Robles Apartments
Pronouns: she/her/hers
- Anne Rice, The OG of Vampiric Studie
- Charlotte Brontë, Director of Counsel
- CS Forester, Assistant Director of Judi
- Dr. Seuss, DOS
- Dr. Sheldon Cooper, Master of his ow
- F. Scott Fitzgerald, Residence Hall Dir
- George Orwell, MSW, CSW, House De
- Gertrude Stein, Dean of General Awe
- Harry Potter, The Boy Who Lived
- Henry David Thoreau, Dean of Studer

General Privileges Communication Analytics **Charges/Issues** IR Layouts Letters Forms Sanctions/Actions Signatures

Which charges/issues are available for this user to select in cases? If access is inherited from a group membership, the charge/issue will be underlined with dashes.

BEHAVIORAL CONCERN

- Aggression
- Depression
- Disturbed Writing
- Heightened Emotional Distress
- Hostility
- Suicidal Remarks or Attempts
- Threats (Direct or Veiled)
- Withdrawal from social groups
- Check/Uncheck All Behavioral Concern Charges/Issues**

Manage Groups
Screen

Manage Users
Screen

Configuring Your System: Sanctions/Actions

Purpose:

- They are an outcome or response to identified behaviors
- They can be supportive measures and/or required interventions

Examples of Supportive Measures:

- Counseling, mentoring, referrals to resources, etc.

Examples of Required Interventions:

- Professional threat assessment, therapist clearance letter, behavior contracts, etc.

Configuring Your System: Sanctions/Actions

Limit who has access to use your Sanctions/Actions

- Select on a user-by-user basis via Manage Sanctions, Manage Users, OR Manage Groups
 - If access is based on Group Membership, they will be underlined with a dashed line on the Manage Users screen

WHO HAS ACCESS?

Checkmark the users who should have access to apply this sanction/action in cases.

- Amy Farrah Fowler, Residence Hall Director, Capstone House
- C.S. Forester, Assistant Director of Judicial Affairs
- C.S. Lewis, Dean of Academic Affairs
- Campus Judicial Board, Campus Judicial Board
- Captain Accountability, Senior Associate Dean of Students
- Cathy Comfort, Director of Counseling
- Dr. Seuss, Dean of Students
- Edgar Allen Poe, Associate Dean of Students
- F. Scott Fitzgerald, Residence Hall Director - Tucker House
- George Orwell, Coordinator of Judicial Affairs/Student Conduct
- Gertrude Stein, Dean of Imagination
- Henry David Thoreau, Dean of Students

Manage Sanctions
Screen

General Privileges Communication Analytics Charges/Issues IR Layouts Letters Forms Sanctions/Actions Signatures

Which sanctions/actions are available for this user to select in cases? If access is inherited from a group membership, the sanction/action will be underlined with dashes.

BEHAVIOR TEAM ACTIONS

- Off-Campus Counseling Assessment
- On-Campus Counseling Referral
- Past Institution Follow Up
- Re-Entry Process
- Social Media Check
- Behavioral Threat Assessment
- Check/Uncheck All Behavior Team Actions Sanctions/Action Items**

Manage Users
Screen

Configuring Your System: Tasks

Set tasks for yourself and others to distribute the workflow

- Add tasks or task templates via the Tasks tab of the UEC

Update Existing Case

2021000901 Phyllis Margaret Lapin-Vance (987654004)

CASE	DEMOGRAPHICS	CONTACT	INCIDENT	EFC	ASSIGNMENT	RESOLUTION	ACTIONS	TASKS	NOTES	OTHER
Student of Concern										
<input type="checkbox"/>	Send Check-In Email			Dr. Seuss	2022-05-13	▼				
<input type="checkbox"/>	Add Progress Notes			Dr. Seuss	2022-05-20	▼				
<input type="checkbox"/>	Meet with Student			Dr. Seuss	2022-05-20	▼				

Configuring Your System: Tasks

Create Task Templates via the Manage Tasks screen

- Are there actions you take for every CARE case?

Editing: Student of Concern Process

ID	Template name	Template access	Owner
69	Student of Concern Process	Shared	Amy Farrah Fowler

Drag and drop  to reorder tasks.

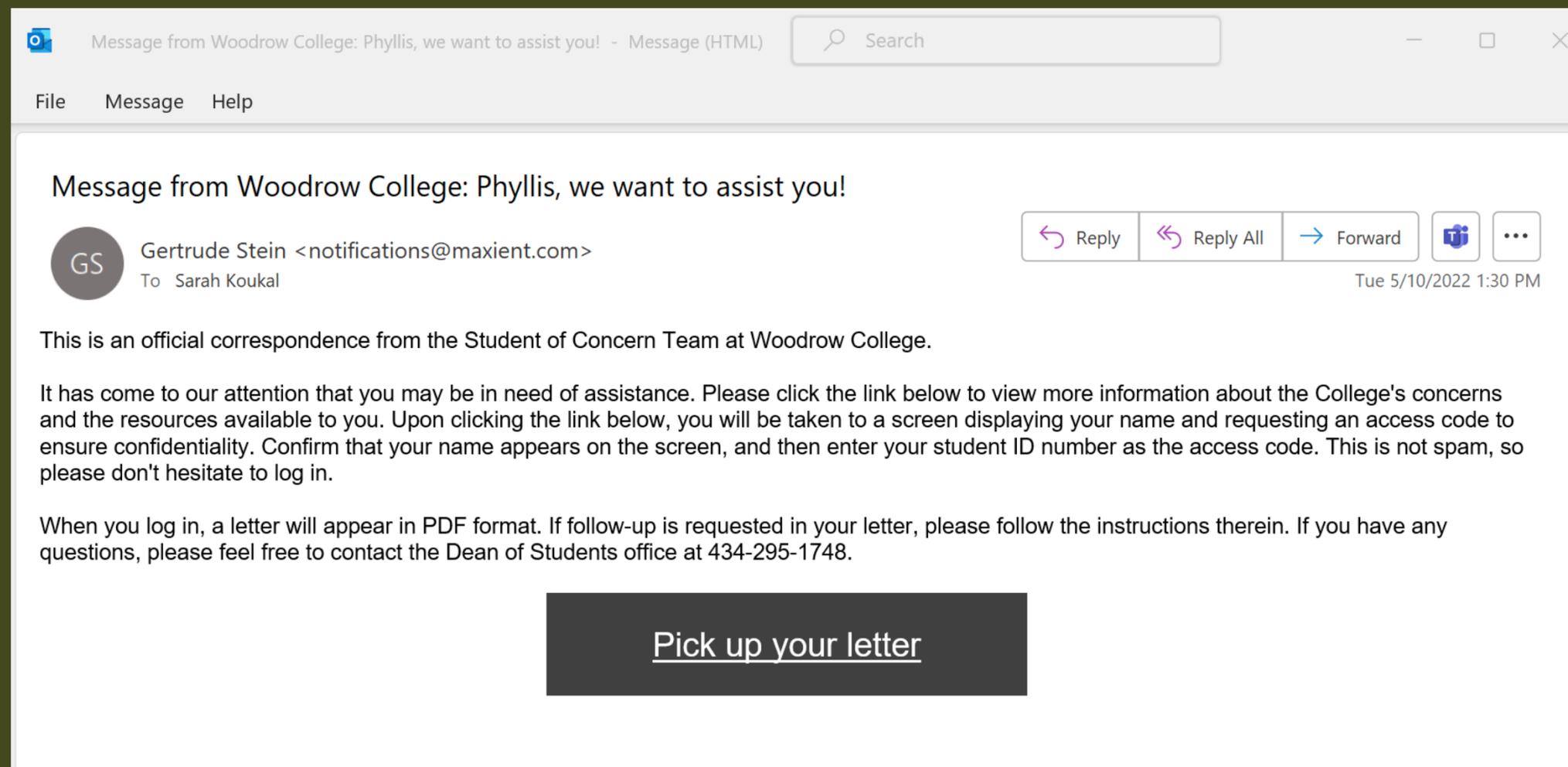
Task <small>(Required)</small>	Category	Due date
Initial Outreach to student	Student of Concern	3 weekdays
Description	Applies to	Assigned to
Phone, email, in person.	One individual	Person case is assigned to
		<input type="checkbox"/> Delete  Move

Task <small>(Required)</small>	Category	Due date
Resource List sent to student	Student of Concern	5 weekdays
Description	Applies to	Assigned to
Send list of resources via a Maxient letter.	One individual	Person case is assigned to
		<input type="checkbox"/> Delete  Move

Configuring Your System: Letter Templates

Will you send students communication via Maxient?

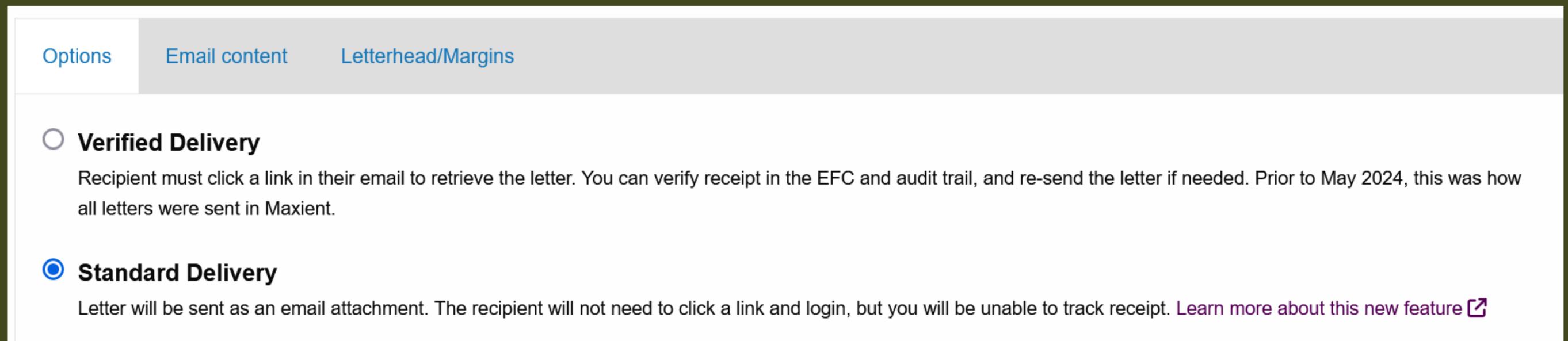
- Create letter templates to make it faster and more consistent!



Configuring Your System: Letter Templates

Verified vs. Standard Letter Delivery

- Wouldn't it be great to send these letters in the body of an email?
- Now you can using "Standard Delivery"!

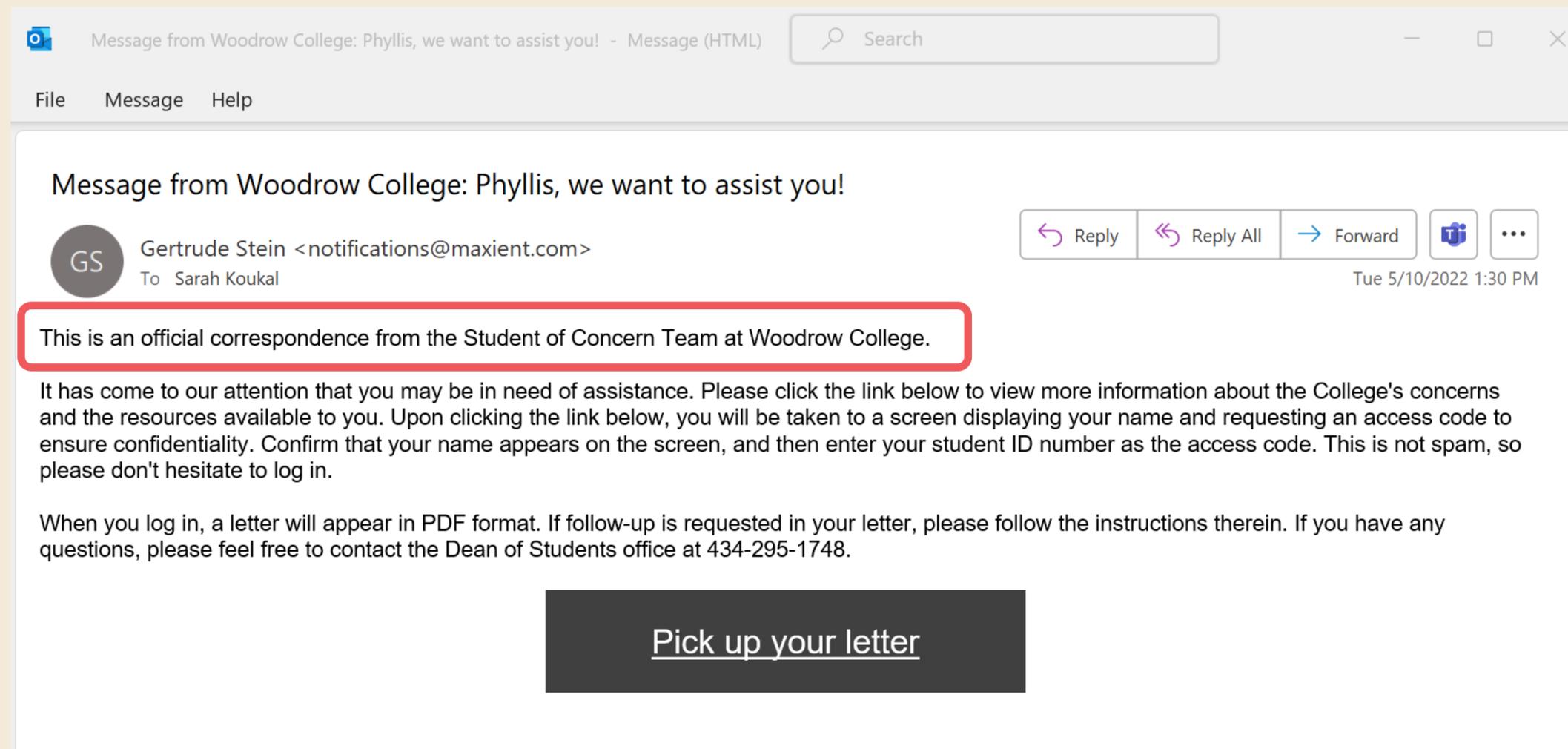


The screenshot shows a configuration interface with three tabs: "Options", "Email content", and "Letterhead/Margins". The "Options" tab is active. Under "Options", there are two radio button options:

- Verified Delivery**
Recipient must click a link in their email to retrieve the letter. You can verify receipt in the EFC and audit trail, and re-send the letter if needed. Prior to May 2024, this was how all letters were sent in Maxient.
- Standard Delivery**
Letter will be sent as an email attachment. The recipient will not need to click a link and login, but you will be unable to track receipt. [Learn more about this new feature](#)

Configuring Your System: Create and Office

When sending email communication, it will appear to originate from this Office/Team



Configuring Your System: Create and Office

Offices are added via the **Manage Offices** screen

Manage Offices/Teams > Overview

[+ Add Office](#)

EDIT	OFFICE NAME	MAILING ADDRESS	EMAIL ADDRESS	PHONE NUMBER
Edit	Academic Affairs	555 Happy Street, Building 7 Charlottesville, VA 22901	aa@maxient.com	434-295-1748
Edit	Behavioral Intervention Team	555 Happy Street, Building 5 Charlottesville, VA 22901	bit@maxient.com	434-555-1212
Edit	Bias Incident Response Team	555 Happy Street, Building 5 Charlottesville, VA 22901	birt@maxient.com	434-555-1212
Edit	Early Alert		earlyalert@woodrow.edu	434-555-1414
Edit	Housing and Residence Life	555 Happy St. Charlottesville, VA 22901	info@maxient.com	434-555-1212
Edit	Human Resources		hr@maxient.com	434-295-1748
Edit	Office of Disability Services	555 Happy Street, Building 5 Charlottesville, VA 22901	accessibility@maxient.com	434-555-1214
Edit	Office of Student Conduct	Charlottesville, VA 22901	osc@maxient.com	434-295-1748

Configuring Your System: Access Restriction

Access Restriction Groups can protect your most sensitive cases

- A Group also allows you to assign issues and actions to group members, rather than updating them individually!

Groups

- Academic Integrity *These are all people who deal with AI cases*
- Alien Cases *Cases involving non-homo sapiens*
- Behavioral Intervention Team *Multidisciplinary group that helps to ensure the well-being of the campus community*
- BRC - Medically Sensitive *Sensitive BRC cases*
- Just Because Group *Just because!*
- Limited BIT *More sensitive cases*
- Office of Student Conduct *All staff members of the OSC*
- Title IX
- [Check/Uncheck All](#)

[Manage Charges Screen](#)



RECEIVING REPORTS

Configuring Your System: IR Layout Examples

Create an IR layout specifically for your BIT/CARE Reports

- University of Akron
https://cm.maxient.com/reportingform.php?UnivofAkron&layout_id=10
- University of Denver
https://cm.maxient.com/reportingform.php?UnivofDenver&layout_id=99
- University of North Georgia
https://cm.maxient.com/reportingform.php?UnivofNorthGeorgia&layout_id=4
- North Carolina State University
https://cm.maxient.com/reportingform.php?NCStateUniv&layout_id=2

Configuring Your System: IR Layout Examples

Be clear in your instructions:

IF THERE IS IMMEDIATE RISK TO LIFE OR PROPERTY, Please Call 911

*Referrals will only be reviewed during normal business hours,
Monday - Friday 8:00 a.m. - 5:00 p.m., and may not be immediately reviewed.*

What happens once a referral is made?

Once a referral has been submitted a member of the CARE staff may contact the reporting party for additional information prior to contacting the student. Once the necessary information has been gathered a staff member may reach out to the student (this is determined on a case by case basis). During our meetings with students, students are provided with appropriate resources and referrals and are offered additional follow up.

Who should use this form?

This referral form is for the use of current students, faculty, staff, and community members. If you have any questions related to completing this form or would like a status update, please email studentaffairs@woodrow.edu.

Configuring Your System: IR Layout Examples

Ask good questions – but not too many!

Questions

What behaviors have you noticed that are concerning? *(Required)*

- | | | |
|---|---|---|
| <input type="checkbox"/> Depression/Anxiety | <input type="checkbox"/> Disjointed thoughts | <input type="checkbox"/> Lack of energy |
| <input type="checkbox"/> Disordered eating | <input type="checkbox"/> Mood swings | <input type="checkbox"/> Withdrawal from social groups/activities |
| <input type="checkbox"/> Suicidal thoughts or actions | <input type="checkbox"/> Excessive crying/emotion | <input type="checkbox"/> Other |
| <input type="checkbox"/> Attempted suicide | <input type="checkbox"/> Angry outburst | |

Please describe the behaviors that prompted this report. Please be as specific as possible, and include names of other witnesses to these behaviors. *(Required)*

Configuring Your System: IR Layout Tools

Are those QR Codes?!

- Put them on flyers or business cards!
- Give them out during Orientation to make reporting faster & easier!

QR CODE

This QR code can be used to direct people immediately to this IR layout. Right-click on the image and save it, then use anywhere you desire!

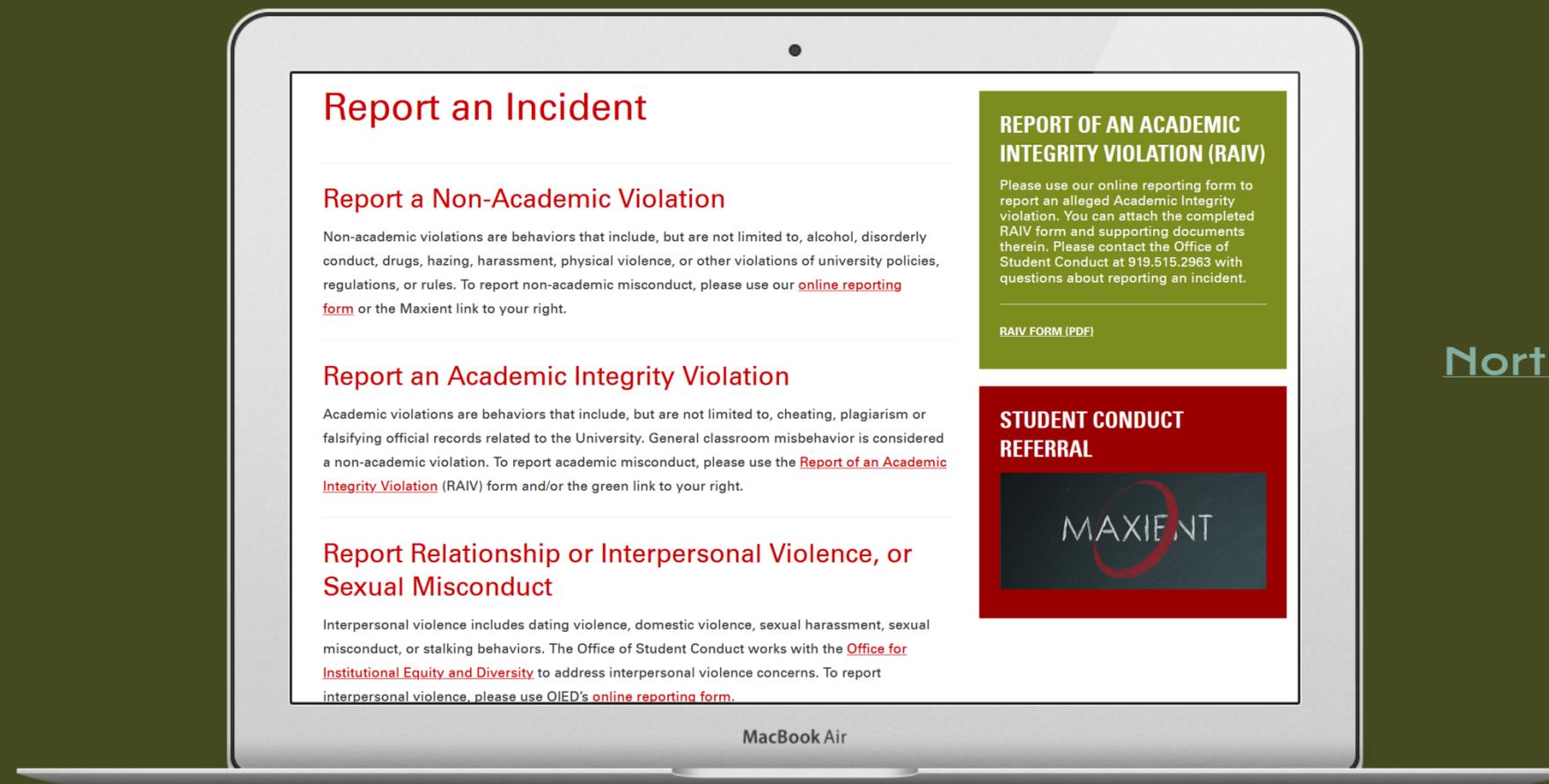


[IR Layouts ->
Edit Layout Screen](#)

Configuring Your System: IR Layout Tools

GET THE WORD OUT!

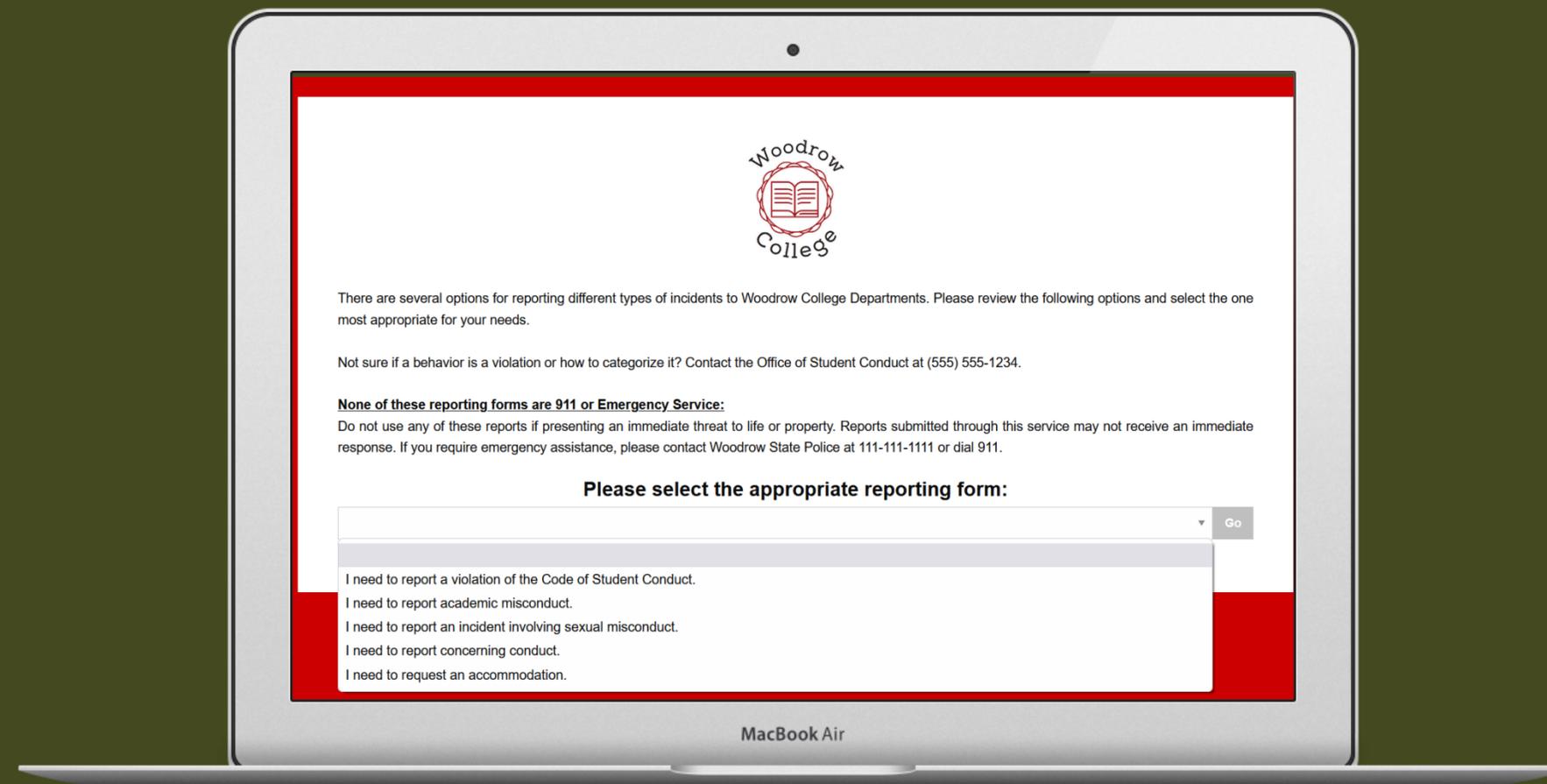
- Consider creating an institutional **reporting landing page** to help reporters identify which reports to use



[North Carolina State University](#)

Configuring Your System: IR Layout Tools

OR ... Take advantage of our IR Landing Page Option!



Configuring Your System: IR Layout Tools

You can find the link and the QR code for the landing page on the Configuration screen

REPORTER LANDING PAGE - INTRODUCTION TEXT

This text appears at the top of the reporter landing page to provide additional instructions to reporters, if needed.

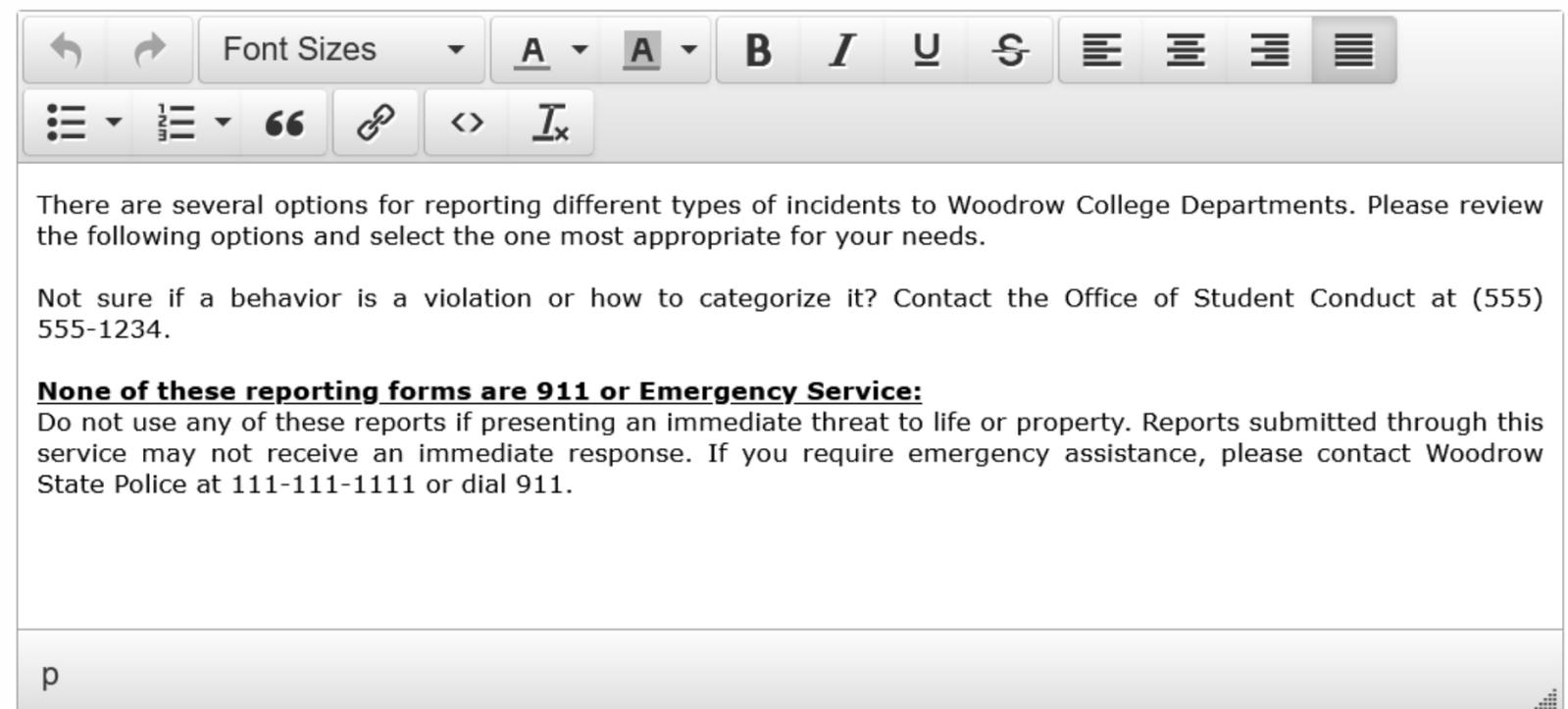
The URL for your landing page is <https://cm.maxient.com/reporting.php?WoodrowCollege>.

For your convenience, this QR code will also take you there:



REPORTER LANDING PAGE - SELECTION LABEL

The text here will appear in bolded type above the dropdown where users select the form they need.

A screenshot of a web-based configuration interface for a reporting form. At the top is a rich text editor toolbar with icons for undo, redo, font sizes, bold, italic, underline, strikethrough, bulleted list, numbered list, quote, link, code, and link removal. Below the toolbar is a text area containing the following content: "There are several options for reporting different types of incidents to Woodrow College Departments. Please review the following options and select the one most appropriate for your needs." followed by "Not sure if a behavior is a violation or how to categorize it? Contact the Office of Student Conduct at (555) 555-1234." and a bolded warning: "**None of these reporting forms are 911 or Emergency Service:** Do not use any of these reports if presenting an immediate threat to life or property. Reports submitted through this service may not receive an immediate response. If you require emergency assistance, please contact Woodrow State Police at 111-111-1111 or dial 911." At the bottom of the text area is a small 'p' icon and a scroll bar.

Please select the appropriate reporting form:





CASE MANAGEMENT

Case Management

Where to Start

Where do your reports come from?

- Faculty/Staff?
- Students?
- Community Members?

Who will create your cases?

- Does one person serve as a funnel?
- Can anyone in the team create a case?
 - If so, make sure to let everyone else know the case exists via Routing Rules, CCs, and/or Pings

Case Management

Where to Start

When do we create cases?

- Create a case for **each new instance of concerning behavior**
- This model utilizes Find People to see a student's behavioral history, recidivism, and/or escalation
- Great overview of a student's behavior over time

Once the case is created, you can select the initial Risk Level, or you can wait until your team meeting.

- From there, the work begins!

Case Management

Day-To-Day Work

Individual Notes

- Track interactions with students (phone calls, emails, parents, faculty, etc.)

Time Spent

- Track how much time your team is spending on each case

Case Management

Day-To-Day Work

Pings

- Let others know about important updates
- Did you know you can ping a group?!

Electronic File Cabinet (EFC)

- Letters from therapists, student statements, additional incident reports, etc.

Case Management

Day-To-Day Work

Tasks

- Use tasks to keep ensure that the elements of your process aren't missed

Actions

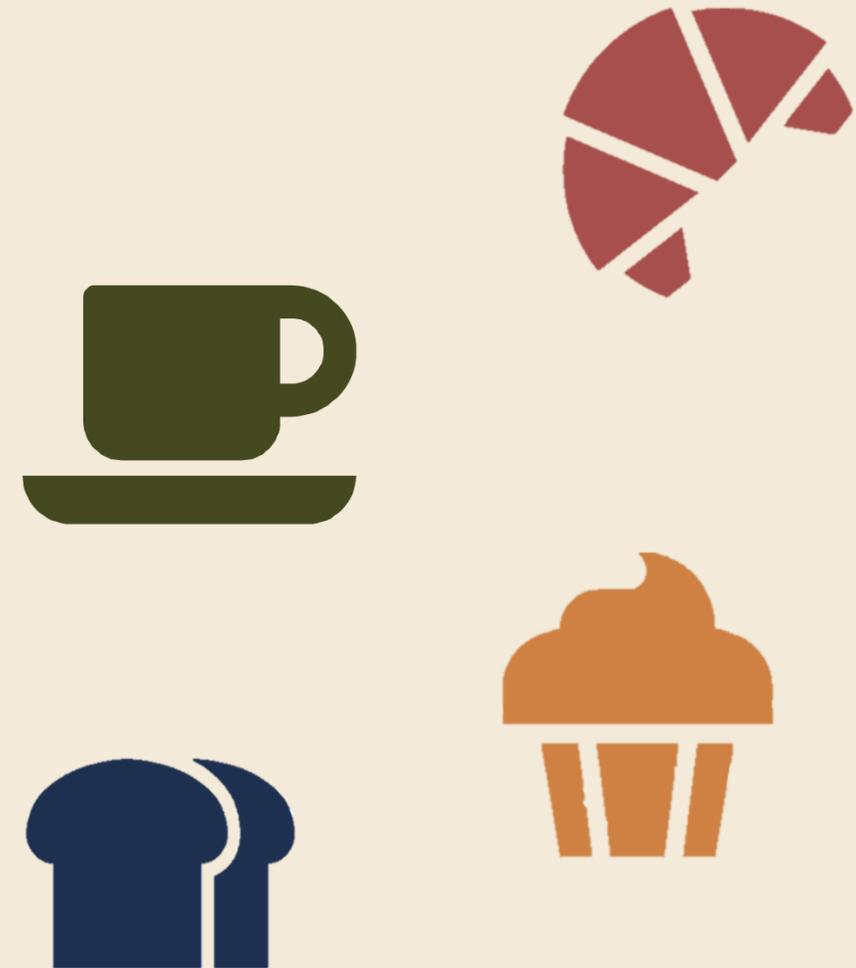
- Track actions, interventions, and/or accommodations
- They will populate on the Case Resolution Form (CRF) when you go to close the case
- Think of these like Interim Actions for other processes!

Case Management Team Meetings

Meet Regularly (Weekly, Bi-Weekly)

Ideas for Team Membership:

- Dean of Students / Student Conduct
- ResLife
- Wellness / Counseling Center
- Academic Affairs
- Campus Safety
- Athletics



Case Management Team Meetings

Work from an Agenda!

- Request a BIT Agenda Analytic Report from our support team!

1307 - New BIT Agenda Report

LEGEND: None provided.

This report displays case information for cases with a case type in the set: 'BIT','Student of Concern' and where the case has a status that is **not** found in the "Statuses - Term for Closed" field in "Configuration". Date ranges are ignored so that no cases are missed. This report is initially ordered by Status ('Monitoring','Title IX - Supportive Measures','Title IX - Adjudication','Title IX - Investigation','Title IX - Outreach','Low Monitor','High Monitor','Resolved - Pending Sanction Completion','Open') and then by the case created date.

CSV Excel Filter Results Column visibility ▾

Showing 1 to 2 of 2 entries Search:

File ID	Status	SID	Photo	First Name	Last Name	Assigned To - Name	Charges/Issues	Case Created Date	Deadline	Deadline Reason	Risk Level	Incident Summary
2021000901	Low Monitor	987654004		Phyllis	Lapin-Vance	Dr. Seuss	Heightened Emotional Distress Hostility	2021-11-16	2021-11-16	Team to review report	Moderate	Student had emotional outburst in faculty member's office.
2021001501	Open	987654014		Andrew	Bernard	Gertrude Stein	Heightened Emotional Distress	2022-05-10	2022-05-13	Outreach to student		A student was crying inconsolably

Showing 1 to 2 of 2 entries

Case Management Team Meetings

There's an order to things!

- NaBITA recommends reviewing older cases first

Risk Levels are important to help direct your conversion!

- In each team meeting, revisit the Risk Level
- Use your NABITA dropdown
- Will you track Risk Level over time using Milestones?

Case Management Team Meetings

Take good notes!

- Whether using a Risk Level dropdown and/or Milestones, add an Individual Note explaining the rationale for the Risk Level, and outlining next steps.

Do the work!

- Assign tasks, write notes, decide on next steps, etc., etc., etc.



RESOLVING CASES

Resolving Cases

Case Resolution Form (CRF)

Summary Document for Supportive Measures

- Summarizes the actions, interventions, and/or accommodations applied in this case

Formal Documentation of any Requirements

- Can assign “Actions” that require due dates
 - Anger management class
 - Counseling assessment
 - Care Plan from a Licensed Provider

Resolving Cases

Multiple Open Cases for One Student?

Close old cases and use the newest case for continued management

- Only manage **one case per case type at one time!**
- Use the most recent case to track current progress and activity
- Close old cases using the CRF
- Add reference notes to related cases to keep information easily accessible

Case Management Other Tools

Forms

- Release of Information Form
- Threat Assessment Form
- Resources Lists

Other Analytic Reports

- Report 95 – Sanction Frequency with Charges
 - You'll see actions you've applied with their associated issues
- Report 52 for a list of actions applied by your Behavior Team
- Report 61 for a list of all the applied issues of concern – it's a great way to spot the trends year-to-year!



Questions?



Thank You!

Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.



Configuring Maxient for Clery Crime Statistics

A Deep Dive



Mike DeBowes

Vice President, Regulatory
Compliance and Strategic Initiatives
D. Stafford & Associates



Michael Ginsburg

Client Success Advisor
Maxient

Understanding Maxient's Clery Structure



How information makes it way into Maxient

> Reporting Forms

- > Reporters select Incident Locations when submitting IRs
- > Charges and Clery designations are assigned later
- > Routing rules may assist you in notifying the reporting structure of the institution

> CSA Forms

- > Typical CSA Reporters: RAs, Campus Safety, Dean of Students Office, Conduct Office, etc.
- > Non-typical CSA Reporters: Wellness Office, coaches, etc.

Understanding Maxient's Clery Structure



Behind the scenes, Maxient is constantly working for you:

- > If the Incident Location matches a value defined as a Clery Location on Configuration, the system associates it with your Clery Geography
- > Individual Maxient users select the applicable Clery designation(s) in each File ID in the Clery Reportability field
- > The Clery Reportability is paired with the Clery Location to populate the output of Clery analytics

Understanding Maxient's Clery Structure

> The role of Level 5 users:

- > Level 5 users identify and modify Incident Locations, Clery Locations, and Clery Associated Charges via the Configuration screen
- > As your code changes, Level 5 users can create new charge titles or edit existing ones
 - > You may decide to cascade changes... or not
 - > Don't forget to reflect those changes on the screens mentioned above!

Understanding Maxient's Clery Structure



So what is the process?

- > Establish charges and locations and ensure they exist in the appropriate Clery boxes on the Configuration Screen
 - > Run Clery Analytic 911 to check your work!
- > Run Clery Analytic 86 to review cases for Clery
- > Run Clery Analytic 85 to view your results!
 - > Filter analytics by Home Office, when multiple campuses or institutions are managed by your Maxient system
 - > Use "Reported Date" as your "Date of Reference"

Configuring Maxient for Clery: Clery-Associated Locations

CLERY LOCATIONS - ON CAMPUS

Subset of your defined incident locations that would be classified as On Campus under the Clery Act. Use semicolons ONLY to separate entries. No semicolon after last entry.

CLERY LOCATIONS - NONCAMPUS

Subset of your defined incident locations that would be classified as Noncampus under the Clery Act. Use semicolons ONLY to separate entries. No semicolon after last entry.

**ON
CAMPUS**

**ON
CAMPUS
RESIDENCE
HALLS**

**NON-
CAMPUS**

**PUBLIC
PROPERTY**

CLERY LOCATIONS - ON CAMPUS RESIDENCE HALLS

Subset of your defined incident locations that would be classified as On Campus Residence Halls under the Clery Act. Use semicolons ONLY to separate entries. No semicolon after last entry.

CLERY LOCATIONS - PUBLIC PROPERTY

Subset of your defined incident locations that would be classified as Public Property under the Clery Act. Use semicolons ONLY to separate entries. No semicolon after last entry.

Configuring Maxient for Clery: Clery-Associated Charges

**ONE FIELD
TO RULE
THEM ALL**

CLERY ASSOCIATED CHARGES

List of charges in your system that, when present in a case, should generally also be in your Clery report. This is used by the Clery Crosscheck report.

Alcohol - Distribution;
Alcohol - Possession;
Alcohol - General;
Alcohol - Presence;
Alcohol - Public Intoxication;
Alcohol - Use;
Weapons or Dangerous Items;
Drugs - Distribution;
Drugs - General;
Drugs - Possession;
Drugs - Presence;
Drugs - Use;
Reported Intimate Partner Violence;
Reported Non-consensual Sexual Contact;
Reported Non-consensual Sexual Penetration;
Reported Sexual Exploitation;

Configuring Maxient for Clery:

Analytic 911

Clery Locations and Charges Crosscheck

- > Run this report **first!** (then 86... then 85)
- > Run this report **annually**
- > Adjust your date range - we recommend running by **Reported Date**

Configuring Maxient for Clery:

Analytic 911

Clery Locations and Charges Crosscheck

- > Uncategorized Locations
 - > Add them to the correct box on Configuration OR ignore them!
- > Charges listed as "No"
 - > Review them all – *should* they be on your Clery-Associated Charges list?
- > Always **add** to the Clery-Associated Charges box. Never delete! (Also never delete Clery Locations)

Configuring Maxient for Clery: Tips & Tricks

- > Incidents occurring outside of On-Campus Student Housing Facilities
- > Public property locations (using block #s or cross streets)
- > Consider broader Locations on IR Layouts, and more precise locations in Configuration (e.g., street name on IR Layout, block numbers in Configuration)
- > Online, Off-Campus, and Unknown Location options

How to Select Clery Crime Classifications in Maxient

- > Users can select Clery Reportability from the Create New Case screen, the Update Existing Case screen, or on the Case Resolution Form
- > Clery Rationale field
- > Use “Not Clery Reportable” when cases have been reviewed and determined not to be Clery crimes (or Clery crimes that occurred outside of Clery Geography – develop a practice and be consistent with how you do this)

Analytic 86 - Clery Crosscheck Report

- > Run this **before** Analytic 85!
- > This is a full review of any cases that have Clery-Associated Charges listed in charges 1-6 on the Resolution tab of the UEC
- > Use it as a guide to help you complete a comprehensive review of Clery Reportability

Analytic 86 - Clery Crosscheck Report

Clery Crosscheck by Charge

Clery Crosscheck by Tag

DESCRIPTION: Clery Crosscheck by Charge
DATES: REPORTED DATE between August 1, 2023 and July 31, 2024
CASE TYPES: All
HOME OFFICES: All
RESULTS: 4
RESTRICTIONS: This report ignores case access restrictions.

[CSV](#)
[Excel](#)
[Filter Results](#)
[Column visibility](#)

Showing 1 to 4 of 4 entries

Search:

File ID	Name	Housing/ Room Number	Incident Date	Reported Date	Incident Location	Incident Location Specific	Assigned To	Referred By	Report Number	Charges	Tag: Review for Clery	Home Office	Age at Incident	Clery Reportability	Clery Rationale	Clery Reportability Last Updated
2023000201	James Halpert	North Quad - 230	2024-03-14	2024-03-15	North Quad	2nd Floor Hallway	Assoc. Dean of Students 2	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy		Housing and Residence Life	18	DISCIPLINARY ACTIONS: Liquor law violations	If you wanted to write a rationale, it would go here. Clery is hard. This helps you remember.	2024-03-19 15:32:29 -- Jean-Paul Sartre
2023000202	Kelly Hannon	Patterson Hall - 501	2024-03-14	2024-03-15	North Quad	2nd Floor Hallway	Assoc. Dean of Students 2	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy		Housing and Residence Life	18	Not Clery Reportable		2024-03-19 15:32:41 -- Jean-Paul Sartre
2023000203	Stanley Hudson		2024-03-14	2024-03-15	North Quad	2nd Floor Hallway	Assoc. Dean of Students 2	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy		Housing and Residence	21	DISCIPLINARY ACTIONS: Liquor law	student under 21 possessed	2024-04-18 17:02:58 -- Jean-Paul Sartre

Analytic 86 - Clery Crosscheck Report

Clery Crosscheck by Charge

Clery Crosscheck by Tag

DESCRIPTION: Clery Crosscheck by Tag
DATES: REPORTED DATE between August 1, 2023 and July 31, 2024
CASE TYPES: All
HOME OFFICES: All
RESULTS: 1
RESTRICTIONS: This report ignores case access restrictions.

CSV Excel Filter Results Column visibility

Showing 1 to 1 of 1 entries

Search:

File ID	Name	Housing/ Room Number	Incident Date	Reported Date	Incident Location	Incident Location Specific	Assigned To	Referred By	Report Number	Charges	Tag: Review for Clery	Home Office	Age at Incident	Clery Reportability	Clery Rationale	Clery Reportability Last Updated
2023000201	James Halpert	North Quad - 230	2024-03-14	2024-03-15	North Quad	2nd Floor Hallway	Assoc. Dean of Students 2	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy	Review for Clery	Housing and Residence Life	18	DISCIPLINARY ACTIONS: Liquor law violations	If you wanted to write a rationale, it would go here. Clery is hard. This helps you remember.	2024-03-19 15:32:29 -- Jean-Paul Sartre

Analytic 85 - Clery Report

- > Run Analytic Report 86 **first**
- > Counts appear in the table at the top of the screen
- > For any Clery Category that has values, we hyperlink it to a component table with a list of the cases (File IDs)
- > This analytic displays in the format required by ED (an “audit trail”), which makes reporting a breeze!

Analytic 85 - Clery Report

Clery Report		Clery Report Breakdown (One Table)				
CSV	Excel	Filter Results	Column visibility ▼			
Showing 1 to 187 of 187 entries		Search: <input type="text"/>				
Clery Category	On Campus	On Campus - Residence Halls	Noncampus	Public Property	Uncategorized	
Not Clery Reportable	1	1	0	0	0	
Unfounded	0	0	0	0	0	
DISCIPLINARY ACTIONS: Illegal weapons possession	0	0	0	0	0	
DISCIPLINARY ACTIONS: Drug law violations	0	0	0	0	0	
DISCIPLINARY ACTIONS: Liquor law violations	2	2	0	0	0	
ARRESTS: Illegal weapons possession	0	0	0	0	0	
ARRESTS: Drug law violations	0	0	0	0	0	
ARRESTS: Liquor law violations	0	0	0	0	0	

Analytic 85 - Clery Report

Clery Report Breakdown - Component cases by category, sorted by incident date

Not Clery Reportable (1)

CSV Excel Filter Results Column visibility ▾

Showing 1 to 1 of 1 entries

Search:

File ID	First Name	Last Name	SID	Age at Incident	Housing/Room	Incident Date	Incident Time	Reported Date	Incident Location	Clery Location Category	Referred By	Report Number	Charges/Issues	Clery Rationale	Clery Reportability Last Updated	Other Clery Categories on Case
2023000202	Kelly	Hannon	987654010	18	Patterson Hall - 501	2024-03-14	10:00 PM	2024-03-15	North Quad	On Campus, On Campus - Residence Halls	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy		Jean-Paul Sartre -- 2024-03-19 15:32:41	

Analytic 85 - Clery Report



Getting audited? You can export all of your case information using the second tab. You also can request a special audit analytic report by emailing support@maxient.com

Clery Report Clery Report Breakdown (One Table)

Clery Report Breakdown as One Table

LEGEND: Report contains the same "component" data from the previous tab, but as one table.

CSV Excel Filter Results Column visibility ▾

Showing 1 to 3 of 3 entries Search:

Clery Category	File ID	First Name	Last Name	SID	Age at Incident	Housing/ Room	Incident Date	Incident Time	Reported Date	Incident Location	Clery Location Category	Referred By	Report Number	Charge/ Issues	Clery Rationale	Clery Reportability Last Updated	Other Clery Categories on Case
Not Clery Reportable	2023000202	Kelly	Hannon	987654010	18	Patterson Hall - 501	2024-03-14	10:00 PM	2024-03-15	North Quad	On Campus, On Campus - Residence Halls	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy		Jean-Paul Sartre -- 2024-03-19 15:32:41	
DISCIPLINARY ACTIONS: Liquor law violations	2023000201	James	Halpert	987654007	18	North Quad - 230	2024-03-14	10:00 PM	2024-03-15	North Quad	On Campus, On Campus - Residence Halls	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy	If you wanted to write a rationale, it would go here. Clery is hard. This helps you remember.	Jean-Paul Sartre -- 2024-03-19 15:32:29	
DISCIPLINARY ACTIONS: Liquor law violations	2023000203	Stanley	Hudson	987654002	21		2024-03-14	10:00 PM	2024-03-15	North Quad	On Campus, On Campus - Residence Halls	Resident Advisor	2024-XXXX	Alcohol - Possession Noise Policy	student under 21 possessed alcohol	Jean-Paul Sartre -- 2024-04-18 17:02:58	

Showing 1 to 3 of 3 entries
[Return to Top](#)

BEST PRACTICES

- > Day-to-Day Case Management:
 - > Create a case from every submitted IR
 - > Add all named individuals in the report (Accuser, Accused, Witnesses)
 - > Include your “unknown” or undisclosed parties
 - > Add Charges/Issues for each involved person
- > Analytics:
 - > Run Analytic 8 - Reports Set Aside and Analytic 9- Incident Reports Pending before finalizing statistics
- > Ongoing Management:
 - > Develop guidelines and a schedule for reviewing Clery Charges and Locations to ensure consistent reporting

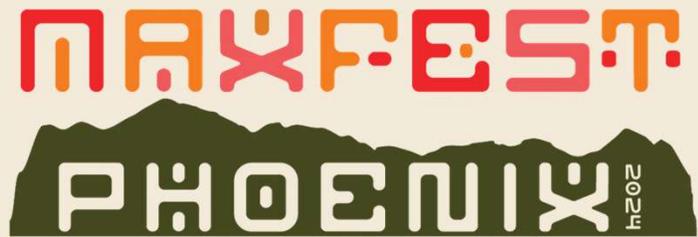


Q&A Time!



Thank You!

Don't forget to complete the
session survey in Guidebook!



Using Maxient to Manage Complaints and Grievances



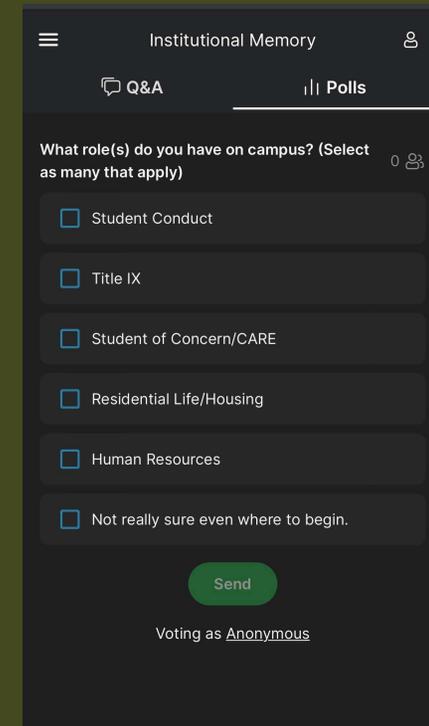
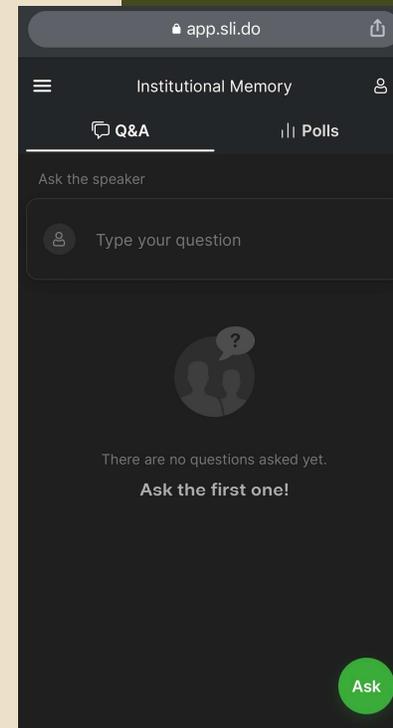
Lance Watson

Senior Client Support Specialist

> QUICK SURVEY AND Q&A

We will use Slido to set up a baseline for all of y'all!

Also, there's a Q&A function where you may add questions



Overview



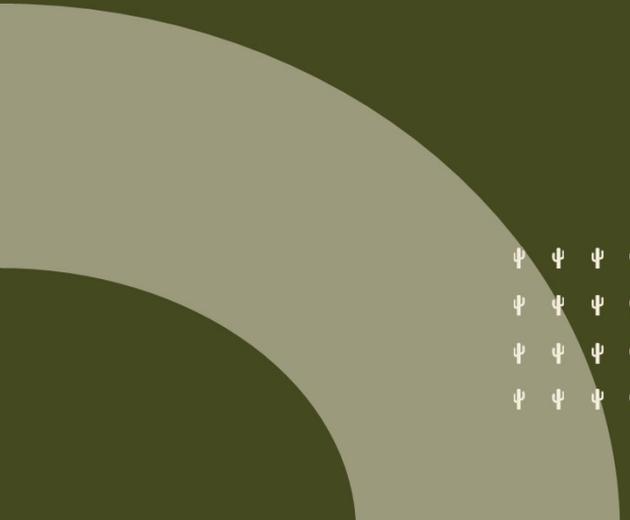
System
Setup



Managing
Complaints



Available
Resources



> A QUICK NOTE

When considering Ombuds processes, you may want to review what the expectations are for record-keeping





SYSTEM SETUP



Case Types

- Create a Case Type



Manage Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

New case type name



Case Types (cont.)

- Update Terminology
 - Charge
 - Finding
 - Hearing Officer
 - Incident
 - Sanction

Values highlighted in green indicate they have been modified from the default values.

Terminology Lists Fields to Hide or Repurpose

Standard Terminology	Customized Name
Charge <i>30 character limit</i>	Issue of Concern
Finding <i>30 character limit</i>	Outcome
Hearing Officer <i>30 character limit</i>	Case Manager
Incident <i>30 character limit</i>	Referral
Sanction <i>30 character limit</i>	Referrals or Actions

Case Types (cont.)

- Modify/Update Lists
 - Appeal Status
 - Classifications
 - Deadline Offset Default
 - Findings
 - Incident Locations
 - Milestones
 - Note Categories
 - Referral Sources
 - Resolution Types
 - Roles
 - Tags

Terminology	Lists	Fields to Hide or Repurpose
Item		Available Options
Appeal Statuses <i>20 character limit per option</i>		No appeal filed; Appeal received; Approved Denied
Classifications <i>30 character limit per option</i>		Freshman; Sophomore; Junior; Senior; Graduate; Not Enrolled; Organization
Deadline Offset Default <i>Specify the number of days</i>		14
Findings <i>30 character limit per option</i>		BRT - Managed by Team; BRT - Referred to Appropriate Area; Medical Amnesty; FYI

Case Types (cont.)

- Repurpose or Hide Fields

Maxient Variable	Field	Customized Name	Visibility
ACADEMIC_ADVISOR	Academic Advisor	<input type="text" value="Academic Advisor"/>	<input type="checkbox"/> Hide
ACADEMIC_MAJOR	Academic Major	<input type="text" value="Academic Major"/>	<input type="checkbox"/> Hide
MEM_ATHLETICS_SPORT	Athletic Affiliation	<input type="text" value="Athletic Affl."/>	<input type="checkbox"/> Hide
CLERY_RATIONALE	Clery Rationale	<input type="text" value="Clery Rationale"/>	<input type="checkbox"/> Hide
CLERY_REPORTABILITY	Clery Reportability	<input type="text" value="Clery Reportability"/>	<input type="checkbox"/> Hide
GPA_CUME	GPA Cumulative (at case creation)	<input type="text" value="GPA Cumulative (at case creation)"/>	<input type="checkbox"/> Hide
GPA_LAST_TERM	GPA Previous Term (before case)	<input type="text" value="GPA Previous Term (before case)"/>	<input type="checkbox"/> Hide



Configuration Screen and Manage Offices

- Configuration:
 - CC Recipients: Department Chairs, Supervisors, etc.
- Home Offices
 - Adding a specific office can customize outgoing correspondence for letter recipients and CCs
 - Equally important: If using memos, the text of the email is edited here
 - For multi-campus/institutions: have an office for each came



Charges/Issues

- The core nature of the complaint
 - Academic, Department Policy, etc.
- Use the Category feature to keep these easily grouped
- They don't require expanded language necessarily

CATEGORY	CHARGE TITLE	EXPANDED LANGUAGE
Complaints	Academic Complaint	Academic Complaint
Complaints	Department Policy Complaint	Department Policy Complaint
Complaints	Distance Learning Complaint	Distance Learning Complaint
Complaints	Facilities Complaint	Facilities Complaint
Complaints	Faculty/Staff Complaint	Faculty/Staff Complaint
Complaints	Finance Complaint	Finance Complaint
Complaints	Personnel Complaint	Personnel Complaint
Complaints	Service Complaint	Service Complaint
Complaints	University Policy Complaint	University Policy Complaint



Sanctions and Action Items

- Reflects what support was offered
 - Referred to an office, ongoing meetings, referred to process
- Can set up Sanction Alerts to notify a department if someone is being referred to them.



Letter Templates

- Includes: Initial Outreach/Confirmation Letter, Follow-Up Letter, Referral Letter
- Things to consider:
 - Leveraging the default CC/BCC function
- Memos: Can be distributed to the office/individuals, not to the complaining party



Incident Report Layout(s)

- Depending on the type of process(es)
- Things to consider:
 - Who can submit IRs?
 - What fields are necessary in the layout?
 - Leveraging the Header and Section Information for explanations
 - Restricting access to IRs: Who should see them?



Groups

- IMPORTANT: A small group who manages the complaints
- Keep it simple: “Complaints”
- Be mindful that if one of the members of the group is the object of the complaint you may need to temporarily remove them.





MANAGING COMPLAINTS



Complaint Received

- The goal of the routing rules is the correct person receives it
- Turn it into a case including the expected type, charges/issues
- Send initial outreach letter
- Add milestone



Managing the Case

- When the real “fun” begins
- DOCUMENT, DOCUMENT, DOCUMENT!
- Note categories to break out follow up notes
 - Don't forget Time Spent too!
- Folders in the EFC: Keeping any follow up correspondence grouped up together



Deciding Next Steps

- Complete the CRF!
 - It captures the Resolution, Findings, Action Items, and Rationale (which is most important)
- Send the follow up letter and memos (if needed)
 - Using the default CC and CC function on letters is going to help





SPECIFIC RESOURCES



Maxient Help Forum

- “Process Specific Workflows – Grievance and Complaints”

which includes:

- A full breakdown of system set up
- A webinar that shows a live example
- A table top exercise
- Sample Letter Templates





Questions?

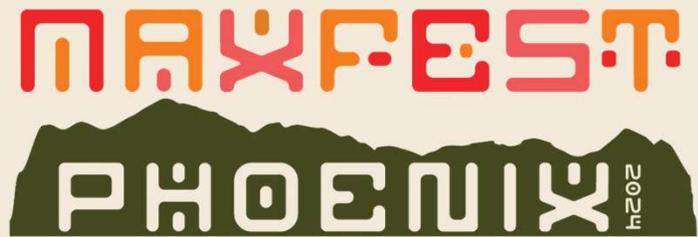


Schedule a follow up screen share using this QR Code!



Thank You!

Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.



Could we do this in Maxient?

A Guide to Adding a New Process



Jason Kistler
Senior Client Support Specialist

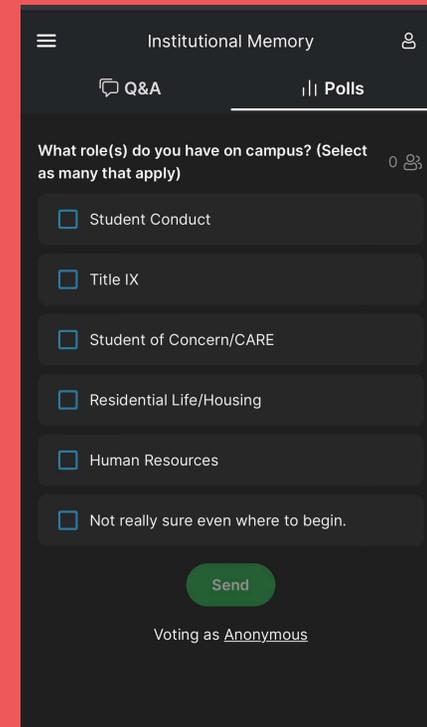
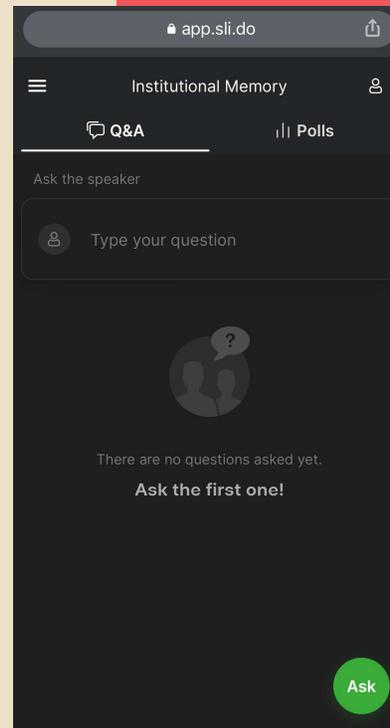


Lance Watson
Senior Client Support Specialist

> QUICK SURVEY AND Q&A

We will use Slido to set up a baseline for all of y'all!

Also, there's a Q&A function where you may add questions



The Process

1. Identify the Workflow

Knowing what you want to add and why

5. Review

Consider successes and challenges

2. Prepare Documents/Information

Get all of the information you want to add put together

4. Train and Go Live

Train new users on the process and start using Maxient

3. Build Into Maxient

Add all the needed items





IDENTIFY THE WORKFLOW



So what do you want to add?

- Questions to ask:
 - Is the process well-defined?
 - Does this process make sense for Maxient?
 - For example - Room reservations? Probably not.
 - Who are the key stakeholders?
- Consult with Maxient! – Client Success Advisor Meeting

Who should be involved?

- Level 5 User
 - They “speak” Maxient
 - May need to show some functionalities
- Person who is responsible for the new process
- The person who is pulling all of the necessary information together (if needed)

> PREPARE DOCUMENTS AND INFORMATION



Items to Consider: New User Accounts

- Who actually needs access to Maxient?
- User Levels: What do they need to do?
- Hearing Officer Titles: Do they need cases assigned to them?
- How will letters be sent out? From the office or individuals?



Manage Users > Add new

Add a user from scratch Replicate an existing user

USERNAME
This value should match the individual's campus/network username.
Minimum 2 characters, no spaces permitted.

Did you know....
....you can replicate accounts for fast user additions?

Items to Consider: Groups/Access Restriction

Manage Groups > Add New Group

NAME	<input type="text" value="Title IX"/>
DESCRIPTION	<input type="text" value="All cases involving gender-based equity concern start in this group."/>

- Does the information need to be access restricted?
- When considering this, think of reasonable restriction needs

Benefits

- Protect sensitive case information
- Grant group permissions to your new group!

Did you know...
....you can ping/email a note to a group?

Items to Consider: Charges/Issues

- What behaviors/information need to be tracked in a concise way?
 - Think "what will I want to know for my annual reports?"
- Will I be sending this to the involved individual(s)?

Benefits

- Tracking of behavior on campus
- Clear communication with involved (if sending letters)

Did you know....

....there are analytics that compare charges to demographic information?

Items to Consider: Sanctions/Action Items

- Capturing how something was managed/resolved.
- What was done in this case?

Benefits

- Letter language!
- analytic tracking – Report 95 – Sanction Frequency with Charges
- Sanction alerts

Did you know....

....you can have notifications go out to campus partners/non-users when a sanction is assigned?

Items to Consider: IR Layouts

- Do you need a new one or add a new “Nature” to a current report
- All depends on how specific the report needs to be
- Routing rules: Don’t forget the default!

Benefits

- Getting the information you need to start your process
- The right people on your team are "in the know"

Did you know....

....you can copy non-users on IRs who many need to be aware of a report?

Items to Consider: Letter Templates

- What needs to be communicated?
- New feature alert: Verified and Standard Sending

Benefits

- Clear and consistent communication
- Attachments

Did you know....

....you can run analytics on your letters?

Options Email content Letterhead/Margins

Verified Delivery

Recipient must click a link in their email to retrieve the letter. You can verify receipt in the EFC and audit trail, and re-send the letter if needed. Prior to May 2024, this was how all letters were sent in Maxient.

- Send notification to the following email address(es) upon pickup (comma-separated):

Standard Delivery

Letter will be sent as an email attachment. The recipient will not need to click a link and login, but you will be unable to track receipt. [Learn more about this new feature](#)

Analytics

Pre-coded Analytics

Choose your report

1 - Snapshot of process

letter

Referrals / Letters

72 - CC Recipients on Letters

74 - Emailed Letters Retrieval Rate by Letter

75 - Emailed Letters Summary

76 - Count of Letters in the Electronic File Cabinet by Address Type

77 - Resent Letters by File ID

Items to Consider: Tasks

Set up your process "To-Do" list!

Update Existing Case 2023002801 Dwight Kurt Schrote (77777777)

CASE	DEMOGRAPHICS	CONTACT	INCIDENT	EFC	ASSIGNMENT	RESOLUTION	ACTIONS	TASKS	NOTES	OTHER	ADMINISTRATIVE
B. Student Conduct - Hearing											
<input type="checkbox"/>	Meet with student	Ron Swanson	2024-06-25	⌵							
C. Student Conduct - Outcome											
<input type="checkbox"/>	Enter hearing/decision information using CRF	Ron Swanson	2024-06-28	⌵							
<input type="checkbox"/>	Send Final Outcome Letter to student	Ron Swanson	2024-07-01	⌵							

Benefits

- Clear steps of what needs to be done
- Due dates!

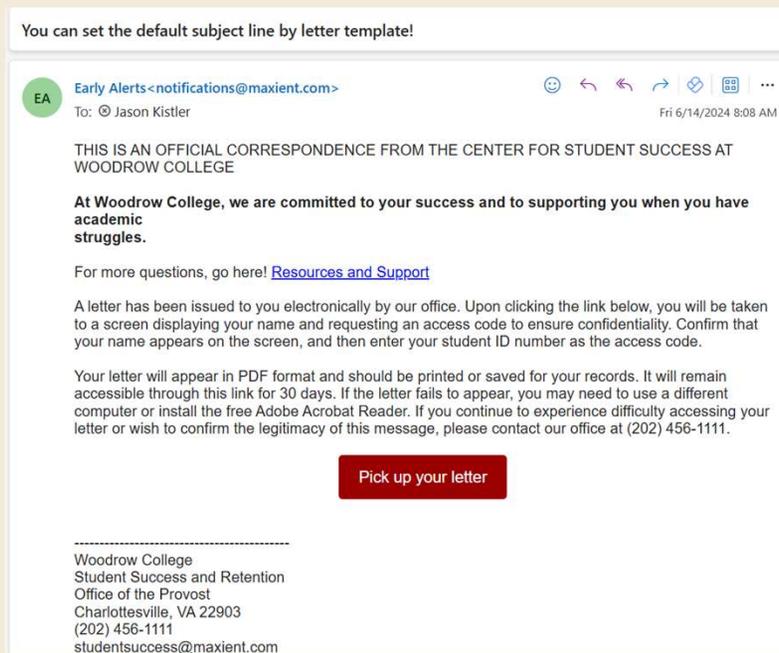
Did you know....

....we can add your tasks to analytic reports!

All Tasks	All Tasks for This File ID
A. Student Conduct - Prep -- Send Meeting Request Letter to student () -- Due: 2024-06-18 - Completed: 2024-06-14	A. Student Conduct - Prep -- Send Meeting Request Letter to student () -- Due: 2024-06-18 - Completed: 2024-06-14
B. Student Conduct - Hearing -- Meet with student () -- Due: 2024-06-25	B. Student Conduct - Hearing -- Meet with student () -- Due: 2024-06-25
C. Student Conduct - Outcome -- Enter hearing/decision information using CRF () -- Due: 2024-06-28	C. Student Conduct - Outcome -- Enter hearing/decision information using CRF () -- Due: 2024-06-28

Items to Consider: Offices

- Manages the email language that is sent for verified letters



Benefits

- Users can limit analytic reports by Home Office
- Manage communication settings

Did you know....
....you may customize the emails for memos and CCs?

Items to Consider: Manage Case Types

- Create a Case Type

Manage Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

New case type name



Items to Consider: Manage Case Types

- Update Terminology
 - Charge
 - Finding
 - Hearing Officer
 - Incident
 - Sanction

Select a case type to view or begin a new one below

CARE

CARE

Values highlighted in green indicate they have been modified from the default values.

[Terminology](#) [Lists](#) [Fields to Hide or Repurpose](#)

Standard Terminology	Customized Name
Charge <small>30 character limit</small>	Issue of Concern
Finding <small>30 character limit</small>	Outcome
Hearing Officer <small>30 character limit</small>	Case Manager
Incident <small>30 character limit</small>	Referral
Sanction <small>30 character limit</small>	Referrals or Actions

Items to Consider: Manage Case Types

- Modify/Update Lists

- Appeal Status
- Classifications
- Deadline Offset Default
- Findings
- Incident Locations
- Milestones
- Note Categories
- Referral Sources
- Resolution Types
- Roles
- Tags

Terminology	Lists	Fields to Hide or Repurpose
Item		Available Options
Appeal Statuses <i>20 character limit per option</i>		No appeal filed; Appeal received; Approved Denied
Classifications <i>30 character limit per option</i>		Freshman; Sophomore; Junior; Senior; Graduate; Not Enrolled; Organization
Deadline Offset Default <i>Specify the number of days</i>		14
Findings <i>30 character limit per option</i>		BRT - Managed by Team; BRT - Referred to Appropriate Area; Medical Amnesty; FYI

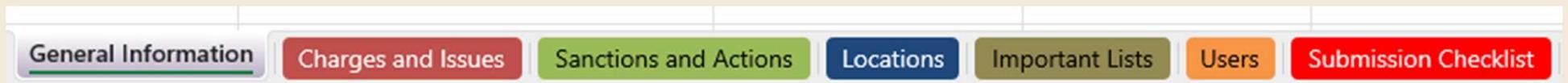
Items to Consider: Manage Case Types

- Repurpose or Hide Fields

Maxient Variable	Field	Customized Name	Visibility
ACADEMIC_ADVISOR	Academic Advisor	<input type="text" value="Academic Advisor"/>	<input type="checkbox"/> Hide
ACADEMIC_MAJOR	Academic Major	<input type="text" value="Academic Major"/>	<input type="checkbox"/> Hide
MEM_ATHLETICS_SPORT	Athletic Affiliation	<input type="text" value="Athletic Affl."/>	<input type="checkbox"/> Hide
CLERY_RATIONALE	Clery Rationale	<input type="text" value="Clery Rationale"/>	<input type="checkbox"/> Hide
CLERY_REPORTABILITY	Clery Reportability	<input type="text" value="Clery Reportability"/>	<input type="checkbox"/> Hide
GPA_CUME	GPA Cumulative (at case creation)	<input type="text" value="GPA Cumulative (at case creation)"/>	<input type="checkbox"/> Hide
GPA_LAST_TERM	GPA Previous Term (before case)	<input type="text" value="GPA Previous Term (before case)"/>	<input type="checkbox"/> Hide

Using a Start-Up Process

- Use Excel to collect information for fields/dropdown boxes
- Shared drive for documents like letter templates, task templates, etc.
- Ideally: Work on this in person



The End Goal of Preparation

- Ensure All of the Relevant Information is in one place
- Assists Level 5 users in identifying the changes
- Accountability!

> BUILD INTO
MAXIENT



Building Process

- Level 4s and 5s
 - Share the load, please!
- Home Screen Announcement: Letting current users know about changes
- Important to check in with stakeholders when things don't make sense

Building Pro-Tips

- Be methodical using the start-up guide
- Consider where the highest impact for current users/processes will be experienced and save for last
- Be prepared for feedback and explain what you are doing



Where Maxient Staff Can Help

- Bulk load charges/sanctions
- Build Dashboards for Hearing Officer Titles
- Build Institution Specific Reports
- A friendly person when things don't make sense 😊

> TRAIN AND GO LIVE



Training

- If new users, have them watch the “Bootcamp@Home” videos first
- Group together for how you will manage the specific process after
- Use test cases
 - Great use of the Custom Data feed!
- This is a great time to identify potential challenges and fix them

Go Live

- Time to start using the process
- If small fixes need to be made, totally fine**
 - ** If its not working, just stop doing it.
- If you are not directly involved in the process, check in with those that are
- Monitor the behind the scenes: Is it causing issues? Confusion?

> REVIEW



SO.... How did it go?

- Get the original group back together and talk it out
- Run analytics to pull information on what's worked well
- If new users, ask them how they thought it went

- The goal: Go back to the workflow and see what changes need to be made.

> FINAL CONSIDERATIONS



Things to Keep In Mind

- Garbage In, Garbage Out: Do the work at the beginning
- Embrace imperfection and don't get stuck in analysis paralysis
- Be open to feedback and patient with

Questions?

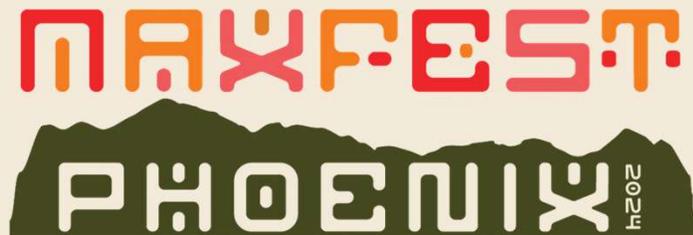


Schedule a follow up screen share using this QR Code!



Thank You!

Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.



(CR)Fantastic Ways to Resolve Cases and Managing Appeals **Using the Case Resolution Form in your process**

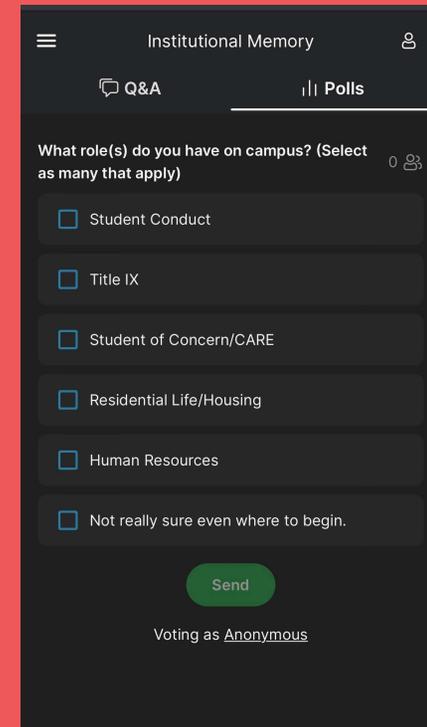
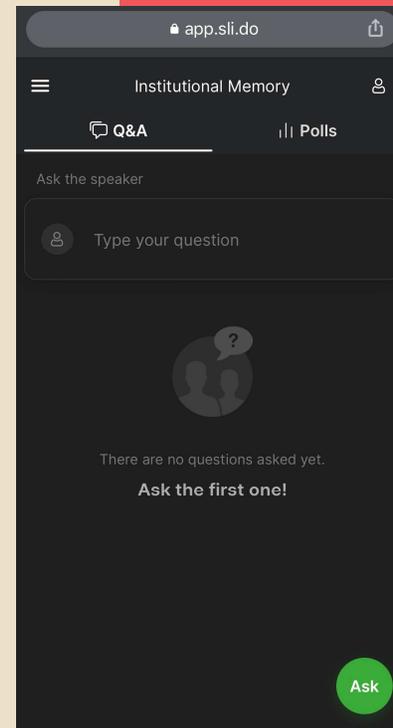


Lance Watson
Senior Client Support Specialist

> QUICK SURVEY AND Q&A

We will use Slido to set up a baseline for all of y'all!

Also, there's a Q&A function where you may add questions



Overview



What is a
CRF?



Why using
a CRF is
important



Managing
Appeals:
From Set Up to
The Process



WHAT IS A CRF?



The Case Resolution Form

- Used to document Resolution information
- The one-stop resolution shop to resolve a case
 - Add Resolution Type
 - Make Findings (as needed)
 - Document Sanctions/Action Items
 - Capture a rationale



Case Resolution Form 2023000401

Name	SID	DOB	Role
Dwight Kurt Schrute	77777777	1991-10-01	Student of concern

I. Resolution Information

Resolution Type	Resolution Date	Administrator(s)
Informal Administrative Hearing	2024-06-14	Asst. Dir. - Judicial Affairs (1) (CS Forester)
Parental/Guardian Notification	Clery Reportability	Clery Rationale
No		

II. Charges/Issues and Findings (if applicable)

1. D.13 Misrepresentation	Responsible
---------------------------	-------------

III. Sanctions / Actions

- **No Contact Order:** You are to have NO CONTACT with until this matter is fully investigated and resolved through the student conduct process. If you do make contact via text, phone, email, online, in person, in writing, through a third party, or in any other way you may be cited/arrested for harassment and face additional disciplinary action. Any retaliatory behavior toward the impacted party/complainant, either by yourself or by any third-party, could be a violation of University policy or may result additional disciplinary action. Retaliation includes violation of no contact orders as well as contact with the impacted party/ complainant through third parties, such as attorneys or private investigators.
- You must write a paper of due THIS FIELD IS EMPTY on . Meet to discuss on Tuesday, November 30, -0001.
- You are placed on Conduct Probation. During that time, if you are found responsible for similar violations of the UNLV Student Conduct Code, your status as a student may be reviewed You are on probation through THIS FIELD IS EMPTY.

IV. Additional Sanctions/Stipulations

V. Rationale

asdfasdfsdfsdfsdfs

Why Use It?

- Takes everything and puts it into one place and copies it to the case
 - Saves several clicks!
- Save to other users for review
- Resolve several cases at once with Rapid Resolve
- Access to Sign to signature and resolution options
 - Using Remote Execution to collect signatures
- A critical appeals document



Finalizing

- When a CRF is finalized, all of the items are added to the case and any sanction/action item alerts go out with the detail fields



Save In Progress

- Save for later for yourself or assign to another user for review

Finalize **Save in progress**

SAVE IN PROGRESS

Saving in progress will record everything from the first page, but NOT any checkboxes or signatures above.

Assign this CRF in progress to:

CS Forester

Scratchpad for temporary notes, maintained as long as this CRF is in a draft state.

Enter a note here:

Execute this CRF remotely, allowing this party to select among the resolution options above. You have the option to include a note; a link to the CRF will be automatically included. Once executed by the recipient, the CRF assignee above will be notified.

Email address (lwatson@maxient.com)

Mobile phone via text message ()

Repeat this for other parties in the case with the role of Alleged, creating saved CRFs for each one selected below. This will replicate the charges, findings, sanctions, rationale, and CCs from the resolution. Do not do this if you are still "working on" this resolution; do it when you're ready to roll it out en masse. Note that once these CRFs are created, they will need to be resolved individually.

Save in progress



Rapid Resolve

- Prior to finalizing the CRF for one person
- Must have the same role as the individual in the CRF
- Adds to all of the selected individuals:
 - Findings
 - Sanctions
 - Deadline Date
 - Deadline Reason



Rapid resolve. Apply this same resolution to other parties in the case with the role of Alleged. Signatures will not be utilized. Case assignment, status, deadline, and deadline reason from above will be applied; tags and pings will not. **Have patience while they process. It can take a few seconds per party.**

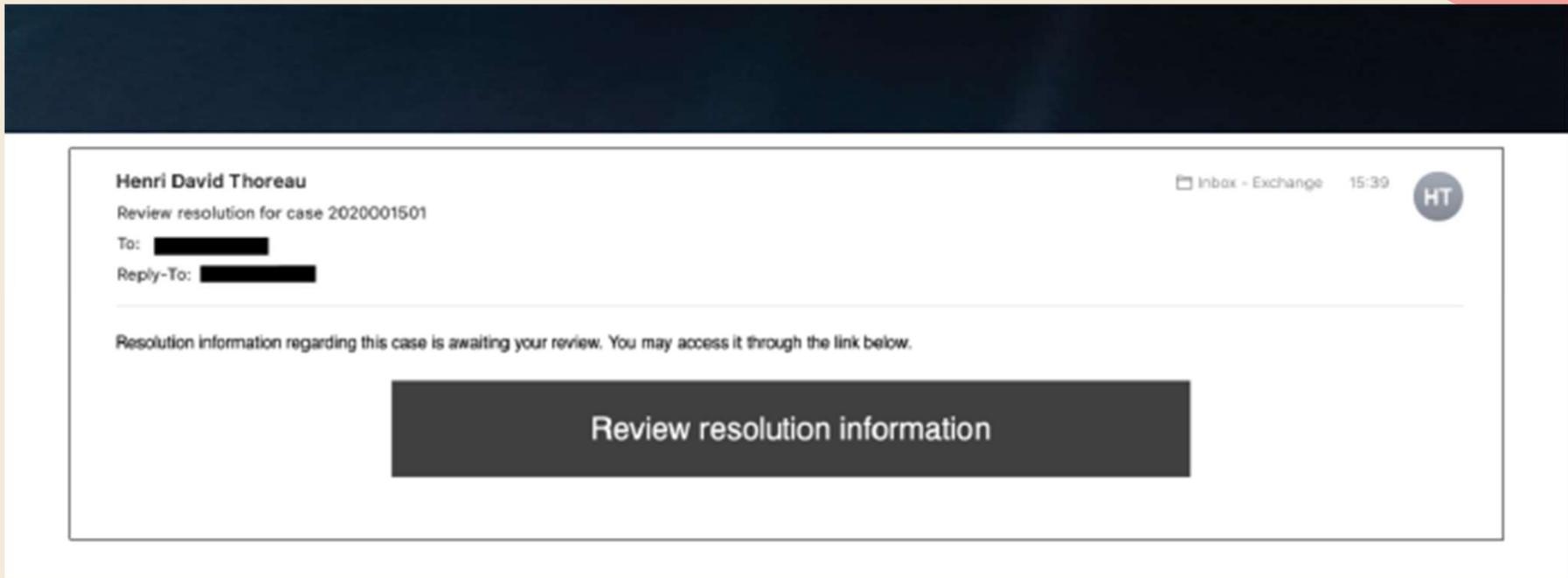
Search:

<input type="checkbox"/>	File ID	Name	SID	Current State
<input checked="" type="checkbox"/>	2023000402	Michael Scott	333333333	Awaiting resolution
<input type="checkbox"/>	2023000403	James (jim) Halpert	987654007	Unavailable as role is Witness, not Alleged
<input checked="" type="checkbox"/>	2023000404	Kelly Hannon	987654010	Awaiting resolution
<input checked="" type="checkbox"/>	2023000405	Kelly Kapoor	987654011	Awaiting resolution

Check/Uncheck All

Slide CRF Remote Execution

- The Involved Part will receive an email



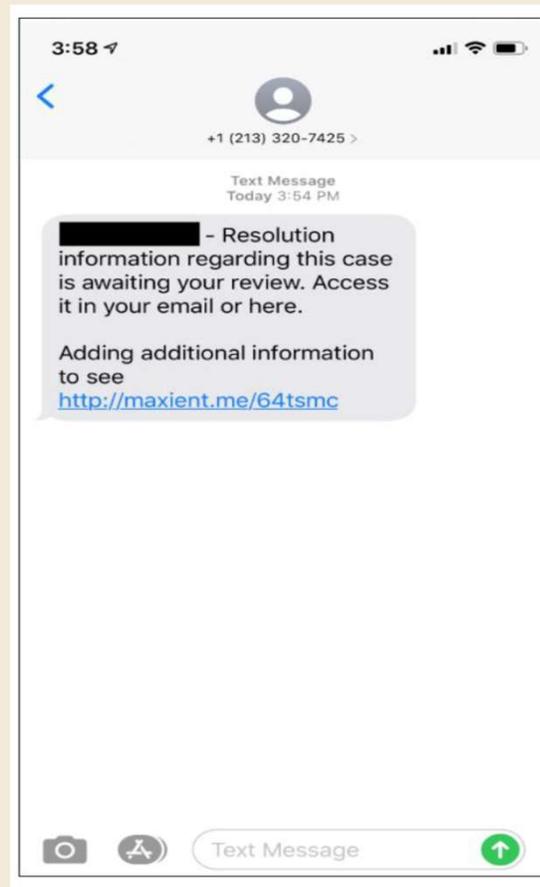
CRF Remote Execution

- Voluptate beliton essesa in cillum ipsueasm dolor



CRF Remote Execution

- A text can also be sent!



CRF Remote Execution

- When they click on the link in the email or text they will see a summary of the CRF and Resolution Options (if applicable) and a signature box.

Parental/Guardian Notification No	Clery Reportability Not Clery Reportable	Clery Rationale Michael was over the age of 21 at the time of the incident. - MDK
---	--	---

II. Charges/Issues and Findings (if applicable)

1. IV. (A.) Alcohol	Responsible
2. Disruptive Activity	Responsible

III. Sanctions / Actions

- must pay an alcohol fine of \$50.00 by October 23, 2020. Payment may be made at the Cashier's Office Monday through Friday 8 am to 5 pm. Checks, cash, and money orders are accepted. [click here to pay](#)
- You must write a paper of 2 due October 16, 2020 on alcohol effects.
- **WARNING** You have issued a disciplinary warning. Please note that continued violations of the Code of Student Conduct will result in more severe sanctions.

IV. Additional Sanctions/Stipulations

V. Rationale

CC List

I acknowledge that I have received notice of the charges, recommended sanctions, and rationale for my disciplinary incident.

I hereby accept responsibility for the above referenced charges with knowledge that the violation may become a part of my permanent university disciplinary record. I also agree with the "Rationale" as written above.

I also hereby accept the disciplinary sanction described above. I understand that any future violation of a Standard of Conduct may result in additional disciplinary charges against me. I also understand that failure to schedule and/or failure to attend any required appointments constitutes a violation of a Standard of Conduct.

In approximately a week you will receive an email from your hearing officer directing you to a follow-up survey where you can provide anonymous/confidential feedback on the student conduct process. Completion of the survey is voluntary and will assist our office in assessing our services. Your participation will be helpful and is appreciated.

I accept responsibility for the allegations and the sanctions as determined in my conduct meeting.

I accept responsibility for the allegations and the sanctions as determined by the hearing authority/university hearing panel.

I understand that a decision has been rendered by the hearing authority/university hearing panel and I retain appeal rights as outlined in the Code of Student Rights and Responsibilities.

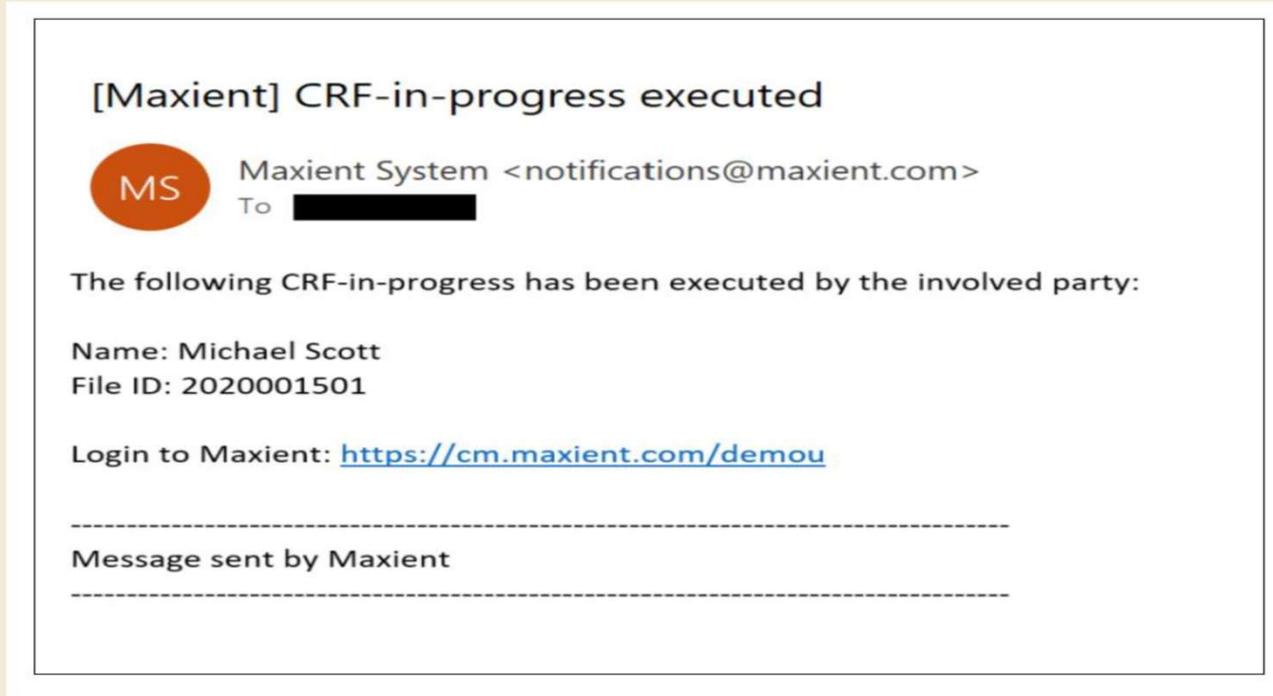
Hearing Desired: I do NOT accept responsibility for the allegations as determined in my conduct meeting therefore I am indicating a request for a hearing with either the Dean of Students, the Assistant Director of Residence Life, Housing and Dining Services or the University Hearing Panel.

Hearing Desired: I do NOT accept the proposed sanctions as determined in my conduct meeting I am indicating a request for a hearing with either the Dean of Students, the Assistant Director of Residence Life, Housing and Dining Services or the University Hearing Panel.

Sign below:

CRF Remote Execution

- Once signed, you will receive an email notification



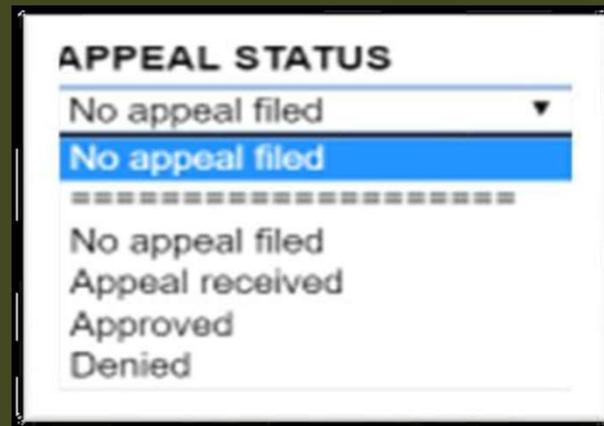


APPEALS: System Set Up



Appeal Status Field

- Think of this is a quick reference for where the appeal is within the process and documenting the outcome
- Found on the *Other* tab of the *Update Existing Case* screen
- Options Managed in Configuration



Milestones

- Captures each step of your appeals process
 - Shows up on the timeline and in analytics
- Located on the “Case” tab of the *Update Existing Case* screen
- Milestones can be added to the *Configuration* screen



Student Conduct Use Only

Appeal Received

Appeal Reviewed

Appeal Decision Sent to Respondent

Appeal Decision Sent to Advisor/National Organization

Appeal Forms as IR Layouts

- Keep everything in one place with an IR layout
- Things to consider:
 - Routing rules: based on staff member or entity
 - Take your current appeals form and translate to an IR
- Once received, you will use the *Move Into EFC* function in *Actions* on the *Pending IRs* section of the home screen to add the appeals form to the case



Letter Templates

- Depending on your process you may have one or two separate – granted and denied





APPEALS: Process



Appeal Received

- Add it to the *Individual Files* in the *EFC*
 - You can also add a folder marked “Appeal” to keep things organized
- Update the appeal status
- Add a Milestone noting the appeal has been received
 - As the process moves along, keep adding Milestones to capture the steps



When an appeal is denied

- Consider update due dates for sanctions/actions
- Send an appeal outcome letter
- Note the final outcome in the appeal section
- Add a Milestone capture that the outcome was sent



When an appeal is granted/altering outcomes

- Go to the *Administrative* tab of the *Update Existing Case* screen, and select “Reset Resolution”
- Complete a new CRF with updated findings, sanctions, etc.
 - Don’t forget about the rationale!
- Update the appeal section
- Add a Milestone capturing the end of the process
- Update the new CRF File name to “Appeal CRF”
- Send your letter





Questions?

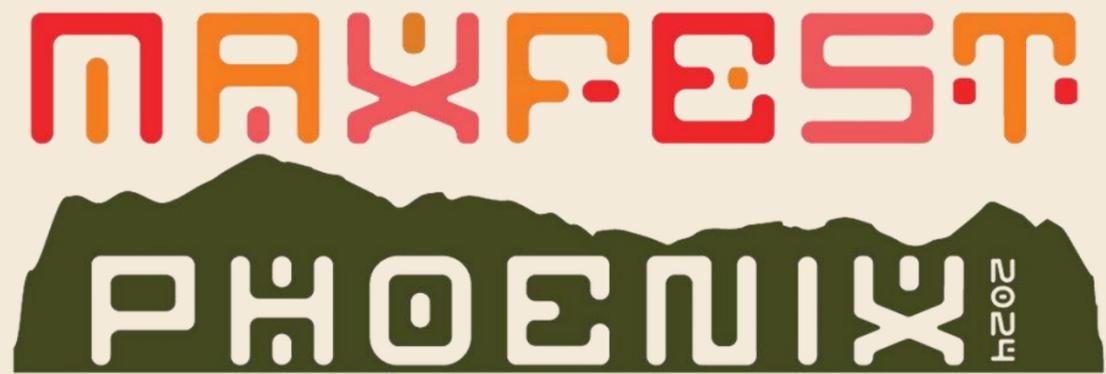


Schedule a follow up screen share using this QR Code!



Thank You!

Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.



Cut a Fine Configuration Screen: How to Customize Maxient for Your Needs



Turi Watson
Client Success Advisor

Configuration Screen Basics

Default Settings

Some fields are dedicated to creating default options within Maxient for certain features. These are not connected to a specific process.

Formats

Each field contains instructions about the proper format for entering information. These are located to the left of each field.

Making Changes

Level 5 users are the only users who have access to this screen and must take care to avoid making changes at the same time. The one who saves last, wins!

Configuration Screen Basics

- Fields are listed in alphabetical order.
- Screen is a bit long, but that has been mitigated by the new Manage Case Types Feature
- The following fields have been moved to Manage Case Types

Manage Case Types	
Case Types	Appeal Status
Classifications	Deadline Offset Default
Findings	Incident Locations
Milestones	Note Categories
Referral Sources	Resolutions Types
Roles	Tags

Configuration Screen Basics

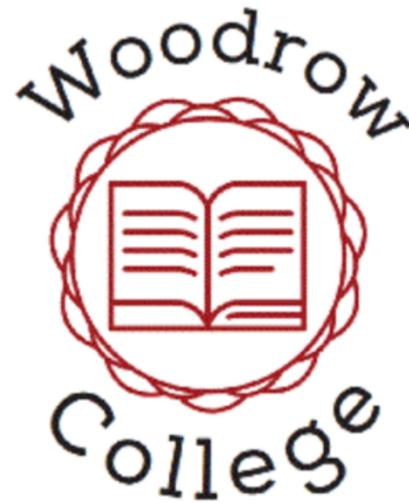
- Creating Drop-Down Menus
 - Enter one entry per line (vertical lists)
 - Use semicolons to separate options
 - Fields will expand to permit as many entries as you require
 - No semicolon after the last entry

Access Restriction

Woodrow College Configuration Screen

INSTITUTIONAL LOGO

GIF format logo to be used anywhere an institutional logo is needed (default for IRs, letter pickup, forms, etc.). Not to exceed 400x400 pixels.



No file chosen

Yes No

ACCESS RESTRICTION - REQUIRED AT CASE CREATION

If yes, the user will be required to choose from the available access restriction groups when creating a new case. If no, an option will be present for the case to be unrestricted.

- Access Restriction can be required
- Users will lose option for "None"
- Could unintentionally create "silos"
- Be sure to add users who "need to know"

Case Type Subset Fields

<p>CASE TYPES - SUBSET REPRESENTING BIT/CARE</p> <p>Case type(s) used in this system for managing BIT/CARE. This represents a subset of the more comprehensive listing of all case types above. Use semicolons ONLY to separate entries. No semicolon after last entry.</p>	<p>BIT; Case Management</p>
<p>CASE TYPES - SUBSET REPRESENTING TITLE IX</p> <p>Case type(s) used in this system for managing Title IX. This represents a subset of the more comprehensive listing of all case types above. Use semicolons ONLY to separate entries. No semicolon after last entry.</p>	<p>Title IX - Student; Title IX/Student Conduct; Tile IX - Employee; Title IX/HR</p>

- These two “Subset” fields should be populated by values defined by your Case Types on the Manage Cases Screen.
- They must be a character for character match of the values on that screen.
- They don’t create new drop-down menus – they assist in the development of analytics.



CC

Recipients



CC Recipients

CC RECIPIENTS

Possible CC recipients. Value to the left of arrow (equal sign and greater than bracket) is displayed in the pull-down menu. Value to the right is the associated email address. Separate with semicolons. Comma use okay.

```
C.S. Forester, Assistant Director of Judicial Affairs => lwatson@maxient.com;  
Dean Athena, Director of Greek Life => athena@maxient.com;  
Dr. Phil McGraw, Director of Counseling Center => drphil@maxient.com;  
Dr. Seuss, Dean of Students => seuss@maxient.com;  
Michael Jordan, Director of Athletics => jkistler@maxient.com;  
Mr. T, Director of Security => mrT@maxient.com;  
O.M. Hubbard, Director of Residence Life => hubbard@maxient.com;  
Mark Twain, Central Campus Area Director => mtwain@maxient.com;  
Behavior Team =>  
hubbard@maxient.com,jkrowling@maxient.com,mrT@maxient.com;  
Student File => NO EMAIL;  
File Copy => NO EMAIL;  
Suspension Group => mrT@maxient.com,none@maxient.com;  
Toni Morrison, Director of Student Conduct => twatson@maxient.com;  
Baseball => hubbard@maxient.com.ikrowling@maxient.com.mrT@maxient.com
```

CC RECIPIENTS - ALLOW USERS TO SPECIFY

If yes, end users will be able to override the CC dropdown menu and enter additional persons and email addresses on a per-letter basis.

Yes No



CC Recipients

This field introduces the arrow, also used in CRF Approvers, Pre-Defined Date Ranges, and Status. When there are issues with copy recipients, check this field first for errors in format or email addresses. Also allows users to specify their own CC Recipients.

CC Recipients

CC RECIPIENTS - LETTERS/MEMO DISTRIBUTION METHOD

For memo recipients and those carbon copied on letters, this determines whether they will receive their copies as a PDF attached to the email, or as a link contained in the email body.

Note: Any correspondence greater than 15MB will be sent via the link method regardless of this setting.

Attachment Link

CC RECIPIENTS - LETTERS/MEMO LINK LIFETIME

If the correspondence distribution method is set to "Link" (or ever has been), the links will remain active and accessible for this number of days from their original date of issue.

Note: A link can always be invalidated by deleting the underlying document from the EFC.

7 days 10 days 14 days 30 days 60 days 90 days 180 days 365 days

never expires

CC Recipients

The ability to send a copied letter or a memo as a link will allow the email to be delivered regardless of size. It also allows for the tracking of when the link is opened to appear in the audit trail and in Analytic 72: CC Recipients on Letters.

You can control how long the links will remain active for the recipient.



Clergy Associated Fields



Clery Associated Fields

Charges

List your Charge Titles

This list requires a character for character match to the Charge Titles on the Manage Charges screen. Impacts Analytic 86: Clery Crosscheck

Locations

Subsets for Locations

You will sort your values from the Incident Locations on your Manage Case Types – Default Settings into the appropriate Clery Locations

Analytics

Analytic 911: Clery Locations Crosscheck

This analytic provides you with info about where your locations appear on IRs and whether they are categorized. Also reviews charges!

Analytic 911: Clery Locations/ Charges Crosscheck

Clery Locations Crosscheck | Charges / Issues Crosscheck

Clery Location Crosscheck for "Configuration", IR Layouts and Cases

CSV | Excel | Filter Results | Column visibility

Showing 1 to 175 of 175 entries

Search:

Incident Locations	Found in Configuration/IR layouts	Found on Cases During Specified Date Range	In "On Campus" Locations List	In "On Campus - Residence Halls" Locations List	In "Noncampus" Locations List	In "Public Property" Locations List	Not Categorized
100 Friendship Circle	Configuration IR Layout 7 IR Layout 42 IR Layout 300	No	Yes	No	No	No	No
100 W. 32nd Street (Indoor Tennis Center)	IR Layout 42	No	No	No	No	No	Yes
104 W. 32nd Street (Hes Research Center)	IR Layout 42	No	No	No	No	No	Yes
115 Rosedale Circle (Grad Students)	IR Layout 42	No	No	No	No	No	Yes
136 Rosedale Circle - Grad Student Housing	IR Layout 42	No	No	No	No	No	Yes
149 Rosedale Circle - Grad	IR Layout 42	No	No	No	No	No	Yes

Review at least annually, to determine if your locations created on your IRs or in your Manage Case Types have been categorized appropriately.

Analytic 911: Clery Locations/ Charges Crosscheck

Review at least annually, to determine if your Charges on cases are designated as Clery Associated Charges.

Clery Locations Crosscheck | Charges / Issues Crosscheck

Clery Charge / Issue Crosscheck

CSV | Excel | Filter Results | Column visibility ▾

Showing 1 to 194 of 194 entries

Search:

Charge / Issue Category	Charge / Issue	Found on Cases During Specified Date Range	Found in "Clery Associated Charges" List
Student Conduct Code	Alcohol - Public Intoxication	Yes	Yes
Student Conduct Code	Alcohol - Use	Yes	Yes
Title IX - Complainant	Reported Sexual Harassment	Yes	Yes
Title IX - Complainant	Reported Stalking	Yes	Yes
Title IX - Respondent	Sexual Harassment	Yes	Yes
Title IX - Respondent	Stalking	Yes	Yes
Assistance/Complaint	Assistance with College Technology	No	Yes
Student Conduct Code	Alcohol - Distribution	No	Yes
Student Conduct Code	Alcohol - General	No	Yes
Student Conduct Code	Alcohol - Presence	No	Yes



CRF Options



CRF Options

CRF APPROVERS

If no values are listed here, all users will be displayed as options in the approvers list. Value to the left of arrow (equal sign and greater than bracket) is displayed in the pull-down menu. Value to the right is the associated username. Separate with semicolons.

John locke => locke;
Toni Morrison => tmorrison

CRF FINE PRINT LANGUAGE

Below you have the option to select your decision regarding the resolution of this case. By selecting any of these options, it **does not** waive your right to appeal.

CRF REMOTE EXECUTION SUCCESS MESSAGE

The text here will be displayed on screen following the successful selection of resolution options and/or providing a signature.

Resolution document updated successfully.

CRF RESOLUTION OPTIONS

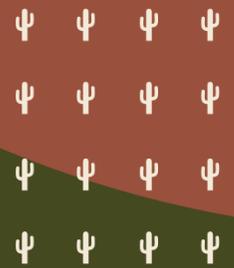
Items listed here will display as a series of checkboxes immediately prior to the signature lines.

I agree to the findings and sanctions;
I agree with the findings, but not the sanctions and want to appeal solely the sanctions;
I desire a board hearing to review all aspects of this case



CRF Options

- A series of settings to set expectations near the bottom of a CRF
- Useful for processes that require an agreement to a resolution
- Remote execution allows you to send CRF to someone for a signature.



Date Fields: Academic Year Vs. Case Year Numbering

First sets your Academic Years for running analytics

Second impacts when your case numbers will automatically advance to the next academic year (first 4 digits).

DATE TO BEGIN NEW ACADEMIC YEAR

Approximate month-date each year when the academic year begins. Used as the start date for Academic Year date ranges in Analytics.

DATE TO BEGIN NEW CASE YEAR NUMBERING

Date on which case numbers will move to the next academic year (first 4 digits of the 10-digit File ID). Must be formatted MM-DD.

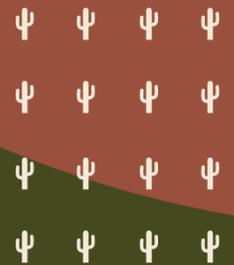


Email Settings



Default Settings

These are used if the same fields for the individual offices are not specified via the Manage Offices screen



DEFAULT EMAIL BODY MESSAGE

The body text for emailed letters is chosen preferentially from the settings of the HOME_OFFICE assigned to manage the case. Absent that, this will appear as the plaintext body of emails to students.

THIS IS AN OFFICIAL CORRESPONDENCE FROM THE DEAN OF STUDENTS OFFICE AT WOODROW COLLEGE

A letter has been issued to you electronically by our office. Upon clicking the link below, you will be taken to a screen displaying your name and requesting an access code to ensure confidentiality. Confirm that your name appears on the screen, and then enter your student ID number as the access code. If you are receiving this notice in your capacity as a leader of a campus organization, you should contact our office immediately to request the appropriate access code for your organization.

Your letter will appear in PDF format and should be printed or saved for your records. It will remain accessible through this link for 30 days. If the letter fails to appear, you may need to use a different computer or install the free Adobe Acrobat Reader. If you continue to experience difficulty accessing your letter or wish to confirm the legitimacy of this message, please contact our office at (434) 295-1748.

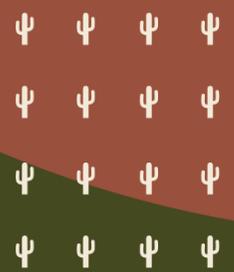
DEFAULT EMAIL SUBJECT LINE FOR LETTERS

The subject line for emailed letters is chosen preferentially from the settings of the HOME_OFFICE assigned to manage the case. Absent that, this will appear as the subject line of emails to students (followed by the File ID number).

Correspondence for Conduct Case

Email Settings

Email sender setting determines who appears as the sender of the email. Auto-Determine means the sender will be the person to whom the file is assigned UNTIL a Resolution Date is present – then it will be the Administrator.



DEFAULT METHOD FOR NOTES

This will be the default method that appears when adding notes to a case.

General Notes Individual Notes

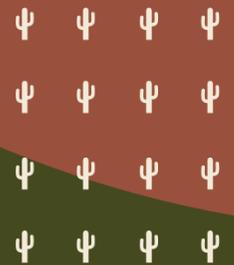
EMAIL SENDER SETTING

Maxient can auto-determine the appropriate From: address for emails sent to the student, based on whether or not the case has been heard. Or, you may specify it should always be the person to whom the case is currently assigned.

Assigned To Auto-determine

Demographics

You set values for Ethnicities, Genders, Housing, etc., but you should try to match values sent in Demographic feed.



ETHNICITIES

List of possible ethnicities. Use semicolons ONLY to separate entries. No semicolon after last entry.

Caucasian;
African-American;
Asian-American;
Hispanic;
Other/No Response

FINDINGS - TERM FOR RESPONSIBLE

Finding(s) used by this school equating to responsible. Use semicolons ONLY to separate entries. No semicolon after last entry.

Responsible;
Founded

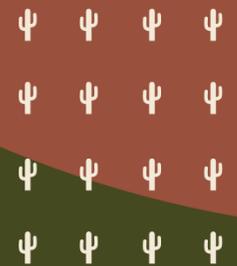
GENDERS

List of possible genders. Use semicolons ONLY to separate entries. No semicolon after last entry.

Male;
Female;
Trans-Male;
Trans-Female;
Gender Queer;
Gender Non-conforming;
Organization;
Building

Analytic 910

Run Analytic 910: Demographic Feed and Configuration Screen Values Crosscheck Report



Gender Values Ethnicity Values Housing Location Values Classification Values Athletic Affiliation Values Greek Affiliation Values Honors Affiliation Values

ROTC Affiliation/Veteran's Status Values

Gender Values

Values in the Gender field cannot exceed 30 characters. If any entry in the "Configuration" options (middle column) exceeds 30 characters, a warning will appear in the column.

CSV Excel Filter Results Column visibility ▾

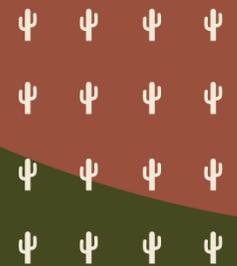
Showing 1 to 1 of 1 entries Search:

Gender Reported in Demographics Feed	Gender Values Available in Configuration Screen	Gender Reported in Cases
Female; Male	Male; Female; Trans-Male; Trans-Female; Gender Queer; Gender Non-conforming; Organization; Building	Female; Male; Office; Organization

Showing 1 to 1 of 1 entries

Analytic 910

Run Analytic 910: Demographic Feed and Configuration Screen Values Crosscheck Report



Gender Values **Ethnicity Values** Housing Location Values Classification Values Athletic Affiliation Values Greek Affiliation Values Honors Affiliation Values

ROTC Affiliation/Veteran's Status Values

Ethnicity Values

Values in the Ethnicity field cannot exceed 30 characters. If any entry in the "Configuration" options (middle column) exceeds 30 characters, a warning will appear in the column.

CSV Excel Filter Results Column visibility ▾

Showing 1 to 1 of 1 entries Search:

Ethnicity Reported in Demographics Feed	Ethnicity Values Available in Configuration Screen	Ethnicity Reported in Cases
; African-American; Asian-American; Caucasian; Hispanic	Caucasian; African-American; Asian-American; Hispanic; Other/No Response	African-American; Asian-American; Caucasian; Hispanic

Showing 1 to 1 of 1 entries

Hearing Officer Titles

GROUP ASSIGNED TO MENUS BY OFFICE Yes No

If yes, the Assigned To dropdown menu will be organized by offices, with users appearing alphabetically beneath each based on their primary office. Otherwise, the list will be ordered as the hearing officer titles appear in Configuration.

HEARING OFFICER TITLES

List of possible hearing officer titles. Max 50 chars each. These appear in the database only (not letters). Use semicolons ONLY to separate entries. No semicolon after last entry.

DOS;
New Hearing Officer;
Dean of Students;
Dean of Students 2;
Asst. Dir. - Judicial Aff;
Asst. to the Dean of Students;
Assoc. Dean of Students;
Assoc. Dean of Students 2;
Area Dir. - Central Campu;
RHD - Capstone House;
RHD - North Quad;
RHD - Simmons Tower;
RHD - Tucker House;

HOTs must be 50 characters or fewer. If you update an HOT, you will create a disconnect between the user and their assigned files. Please submit a help ticket and we will reassign files.

IR Settings

IR ATTACHMENTS - LINK LIFETIME

Anyone receiving an emailed copy of an incoming report will see the attachments appear as links in that message. The links will remain active and accessible for this number of days from their original date of issue.

7 days 10 days 14 days 30 days 60 days 90 days 180 days 365 days never expires

IR EDITING OPTIONS

This setting determines the options available to your users when editing a previously submitted IR. You may require that they overwrite the original, append their changes (thereby preserving the original), or give both options.

Overwrite only Append only Both

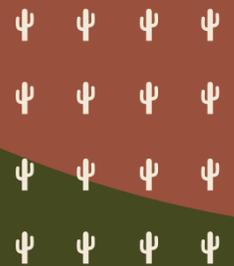
IR Settings

You can determine how long IR attachments are available for copy recipients. Note that this applies to all IR layouts within your system.

You can select your preferred option for editing IRs as well.

IT Contacts

- Helps us send messages when there are issues with the data feeds.
- Level 5 users may want to add themselves to the Data Feed contact field to stay in the loop.
- It is helpful to have valid, personal email addresses and not generic IT help desk emails.



IT CONTACTS - AUTHENTICATION Email address(es) for the technical points of contact handling authentication. Comma-separated, no spaces.	<input type="text" value="someone@woodrow.edu"/>
IT CONTACTS - DATA FEEDS Email address(es) for the technical points of contact for data feeds. All those listed here will receive automatic email notifications in the event of a feed problem or failure. Comma-separated, no spaces.	<input type="text" value="someone@woodrow.edu"/>
IT CONTACTS - MAIL ADMINS Email address(es) for the technical points of contact for email delivery issues. Comma-separated, no spaces.	<input type="text" value="someone@woodrow.edu"/>



Letter Settings

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Letter Name Format and Retrieval Language

LETTERS - NAME FORMAT FOR ADDRESS BLOCK

Determines the initial format of the recipient name in the address block atop letters and on envelopes. Legal Name is simply the first and last name as stored in Maxient. For Preferred Name, the system will fall back to legal name if absent. For Legal plus Preferred, the preferred name will appear in parentheses. Remember that regardless of the chosen initial format, these sections are completely editable by the user when drafting a letter or envelope.

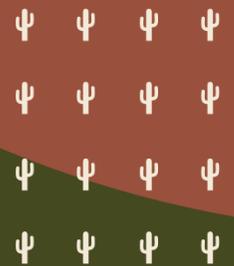
Legal Name Preferred Name Legal plus Preferred

LOGIN MESSAGE FOR RETRIEVING LETTERS

This message will appear on the screen for students when they login to retrieve letters.

Please confirm that your name (or the name of the organization you represent) appears below.
After successfully entering your access code, your letter will display in this browser window.

Letters are available through this system for a limited period of time. It is strongly recommended that you print a copy to retain for your records.



Pay attention to instructions to the left for Name Format – this can still be edited when drafting a letter.

Login message displays when individual claims their letter via emailed link.

Letters and Merge Field Settings

LOGIN MESSAGE FOR RETRIEVING LETTERS

This message will appear on the screen for students when they login to retrieve letters.

Please confirm that your name (or the name of the organization you represent) appears below.
After successfully entering your access code, your letter will display in this browser window.

Letters are available through this system for a limited period of time. It is strongly recommended that you print a copy to retain for your records.

MERGE LANGUAGE: ADDITIONAL SANCTIONS LEAD-IN STATEMENT

The statement listed here will be used as a lead-in to the additional sanctions section when the corresponding merge field is utilized in letters.

With respect to the information listed above, the following additional sanctions/stipulations apply:

Merge Language here displays in a letter that includes `{{ADDITIONAL_SANCTIONS}}` merge fields or when you use the `{{ALL_SANCTIONS_LIST}}`

Letters and Merge Field Settings

MERGE LANGUAGE: ALL_SANCTIONS_LIST POST-PEND

STATEMENT

The statement listed here will be post-pended to the list of sanctions when the ALL_SANCTIONS_LIST merge field is utilized in letters, provided there are actually sanctions.

If you fail to complete the developmental sanctions by the timeframe listed above, additional sanctions may be imposed. If you would like to appeal this decision, you must submit your appeal using the http://cm.maxient.com/reportingform.php?MoravianCollege&layout_id=35 appeal submission form by **4 pm** on the seventh day following the date on this letter.

In purple box in first letter

MERGE LANGUAGE: ALL_SANCTIONS_LIST PRE-PEND

STATEMENT

The statement listed here will be pre-pended to the list of sanctions when the ALL_SANCTIONS_LIST merge field is utilized in letters, provided there are actually sanctions.

As a result of those findings, the following sanctions have been imposed in accordance with the Student Code of Conduct:

In blue box in first letter

MERGE LANGUAGE: INDEFINITE DATE STATEMENT

When a date of 9999-12-31 is entered for a sanction, this statement will replace it in letters.

the remainder of your career at Woodrow University

MERGE LANGUAGE: NO SANCTIONS ISSUED STATEMENT

The statement listed here will be used in lieu of a sanctions list on outcome letters when no sanctions have been issued.

No further action is required on your part.

In orange box in second letter

MERGE LANGUAGE: RATIONALE LEAD-IN STATEMENT

The statement listed here will be used as a lead-in to the rationale when the corresponding merge field is utilized in letters.

The following rationale has been provided by the hearing officer/board:

In green box in first letter

Outcome Letter

BODY TEXT

This is the heart of your template. It should begin with the greeting (e.g. *Dear <<FIRST_NAME>>*;) and end with a closing (e.g. *Sincerely*;) Basic HTML markup is supported.

[View a dictionary of merge fields](#)

<<BASIC_SALUTATION>>,

This letter is to inform you of the outcome of your recent Student Conduct Hearing, which occurred on <<HEARING_DATE_WITH_DAY>>. As a result of that hearing, the following decision(s) have been made:

<<ABBREVIATED_CHARGE_FINDING_LIST_BULLETS_INDENT>>

<<RATIONALE_WITH_LEADIN>>

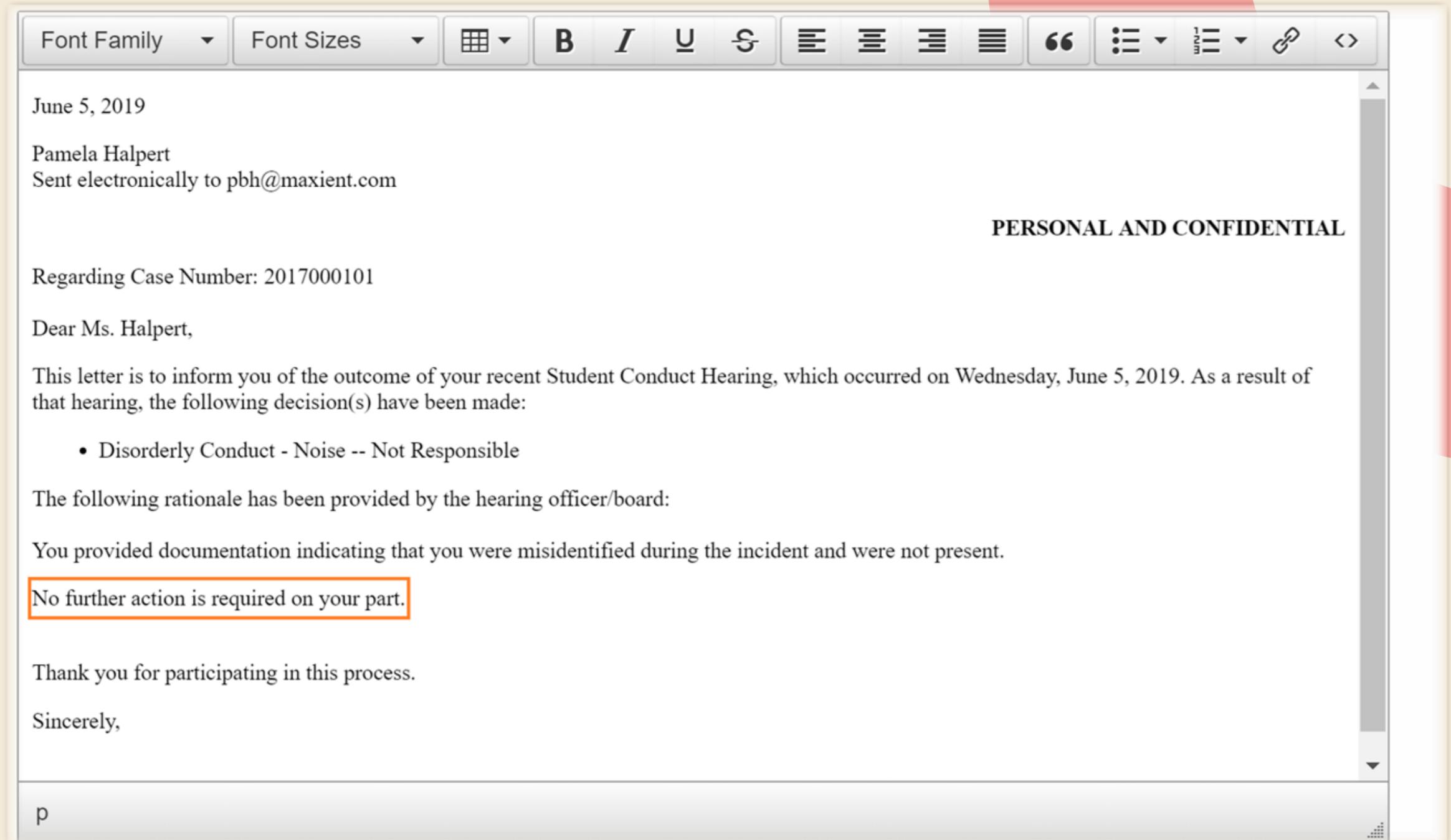
<<ALL_SANCTIONS_LIST_BULLETS>>

Thank you for participating in this process.

Sincerely,

Important Note: This letter includes a merge field that includes a version of the {{ALL_SANCTIONS_LIST}}.

Outcome Letter With Merge Fields



With no sanctions, letter ignores those merge fields and simplifies letter to include No Sanctions Issued values.

PeopleFinder

PEOPLEFINDER - AUTHORIZED USERS

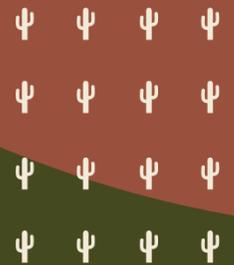
List of usernames that are permitted to search your campus data feed from your publicly-facing IR layouts. Requires campus-based authentication be active. Use semi-colon to separate usernames with no semi-colon after the last entry.

afowler;
jpsartre;

PEOPLEFINDER - DISPLAYED FIELDS

By default, the PeopleFinder will display a photo, first name (including preferred/nick name), last name, SID, gender, dob, housing (w/room number), local phone, and email address. You may select up to five (5) additional fields here. Please note that in order to see any content, the field(s) you select must of course be present and populated in your demographics data feed.

- NETWORK USERNAME
- MIDDLE NAME
- ETHNICITY
- LOCAL ADDRESS
- LOCAL CITY
- LOCAL STATE
- LOCAL ZIP



Can only be used if campus-based authentication is active and valid usernames are entered as authorized users.

Permits non-Maxient users to search Data Feed to submit information on an IR

Pre-Defined Date Ranges for Analytics

PRE-DEFINED DATE RANGES FOR ANALYTICS

Create specific ranges of time (i.e. semesters, quarters) for use in running analytics. Information to the left of the arrow is the name, information to the right is the start and end date separated by a colon. Separate each entry with a semicolon. No semicolon after last entry.

```
Summer 2023 => 2023-05-16:2023-07-31;  
Spring 2023 => 2023-01-01:2023-05-15;  
Fall 2022 => 2022-08-01:2022-12-31;  
Summer 2022 => 2022-05-16:2022-07-31;  
Spring 2022 => 2022-01-01:2022-05-15;  
Fall 2021 => 2021-08-01:2021-12-31
```

Use arrow functions connecting left and right-side values.

These will appear in the date range drop-down menu for running analytics

Order them from most recent to oldest, so they'll order in the same way when selecting your data range drop-down menu.

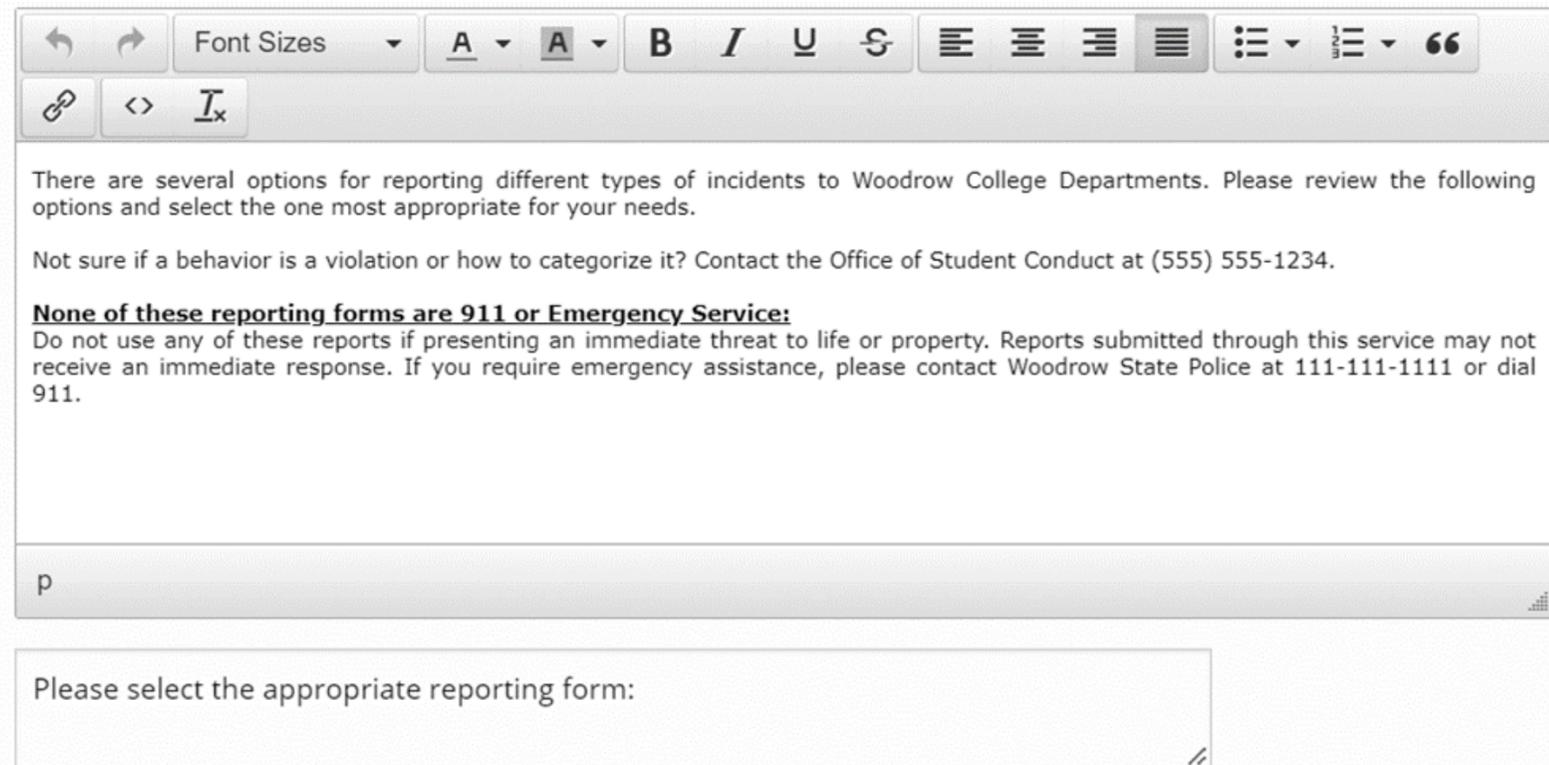
Reporter Landing Page Settings

REPORTER LANDING PAGE - INTRODUCTION TEXT

This text appears at the top of the reporter landing page to provide additional instructions to reporters, if needed.

REPORTER LANDING PAGE - SELECTION LABEL

The text here will appear in bolded type above the dropdown where users select the form they need.



The screenshot shows a WYSIWYG editor interface. At the top is a toolbar with various icons for undo, redo, font sizes, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and quote. Below the toolbar is a text area containing the following content:

There are several options for reporting different types of incidents to Woodrow College Departments. Please review the following options and select the one most appropriate for your needs.

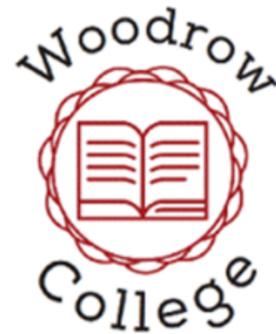
Not sure if a behavior is a violation or how to categorize it? Contact the Office of Student Conduct at (555) 555-1234.

None of these reporting forms are 911 or Emergency Service:
Do not use any of these reports if presenting an immediate threat to life or property. Reports submitted through this service may not receive an immediate response. If you require emergency assistance, please contact Woodrow State Police at 111-111-1111 or dial 911.

Below the text area is a horizontal bar with a 'p' icon on the left and a small icon on the right. At the bottom is a text input field with the placeholder text "Please select the appropriate reporting form:" and a small icon on the right.

Information here will be visible on the Landing Page that you can create to promote multiple IR layouts via one URL link.

Reporter Landing Page Appearance:



There are several options for reporting different types of incidents to Woodrow College Departments. Please review the following options and select the one most appropriate for your needs.

Not sure if a behavior is a violation or how to categorize it? Contact the Office of Student Conduct at (555) 555-1234.

None of these reporting forms are 911 or Emergency Service:

Do not use any of these reports if presenting an immediate threat to life or property. Reports submitted through this service may not receive an immediate response. If you require emergency assistance, please contact Woodrow State Police at 111-111-1111 or dial 911.

Please select the appropriate reporting form:

Roles - Term For Fields

ROLES - TERM FOR ALLEGED

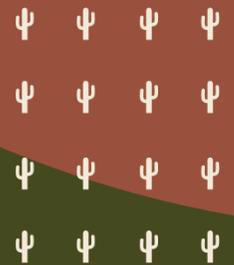
Role(s) used by this school to identify the respondent. Use semicolons ONLY to separate entries. No semicolon after last entry.

Alleged;
Responding Party;
Respondent;
Object of Complaint

ROLES - TERM FOR COMPLAINANT

Role(s) used by this school to identify the complainant. Use semicolons ONLY to separate entries. No semicolon after last entry.

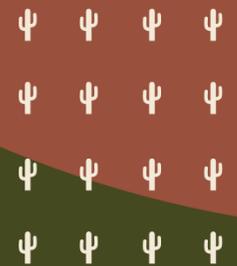
Complaining Party
Requester;
Victim/Survivor;
Complainant



Roles are set via the Manage Case Types screen, but these fields will impact analytics when you define which of your existing values are terms for Alleged or Complainant.

Sanctions Settings

SANCTION REMINDERS - BODY MESSAGE Bodytext language of the automated email sanction reminders sent to students	<input type="text" value="This email serves as a friendly reminder that you have an obligation due within the next few days in the above referenced case. <i>Please refer to your previous letters and correspondence for further details.</i>"/>
SANCTION REMINDERS - ENABLED? If enabled, the system will look nightly for upcoming sanctions and send email reminders to your students.	<input checked="" type="radio"/> Yes <input type="radio"/> No
SANCTION REMINDERS - LEAD TIME If sanction reminders are enabled, the system will look this many days into the future for sanctions coming due.	<input type="text" value="1"/>
SANCTION REMINDERS - SUBJECT LINE Subject line of automated email sanction reminders to students	<input type="text" value="Upcoming due date for your case"/>



Sanction reminders contain generic information, not the actual sanction details. Remember this language should cover all process that use this feature.

Status Fields

STATUSES

Case statuses and coordinating colors. Separate with a semicolon. No semicolon after last entry. Comma use okay.

Open => red;
Resolved - Pending Sanction Completion => purple;
Closed => green;
Closed - Not Enrolled => green; (Hint: Please don't use white!)
High Monitor => orange;
Low Monitor => blue;
Awaiting Re-Certification => purple

STATUSES - TERM FOR CLOSED

Case status value(s) used by this school to indicate cases that are closed. Use semicolons ONLY to separate entries. No semicolon after last entry.

Closed;
Closed - Not Enrolled

Use the arrow format to set up colors for your statuses...using names or actual hex codes, which can be found online (like #AE2024). STATUS - Term for Closed will prevent files with those statuses from appearing on anyone's home screen.

Title IX Associated Charges

TITLE IX ASSOCIATED CHARGES/ISSUES

List of charges/issues in your system that, when present in a case, may indicate relevance for review with respect to Title IX.

Reported Intimate Partner Violence;
Reported Non-consensual Sexual Contact;
Reported Non-consensual Sexual Penetration;
Reported Sexual Exploitation;
Reported Sexual Harassment;
Reported Stalking;
Intimate Partner Violence;
Non-consensual Sexual Contact;
Non-consensual Sexual Penetration;
Sexual Exploitation;
Sexual Harassment;
Stalking

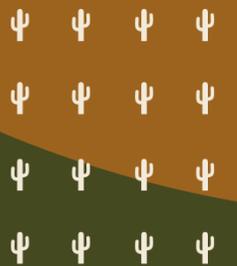
Like Clery Associated Charges, these should be a character for character match to any Charge Titles that are associated with your Title IX process. This impacts analytics, but doesn't create any new drop-down menu of charge titles.



Questions?



Thank You!



Please complete the evaluation
for this program, found in
Guidebook, to help us plan for
future MaxFests.



Data: More Than a Four-Letter Word | Creating a Culture of Future-Oriented Data

Cortney Brewer, Maxient System Analyst | brewer.412@osu.edu

Salin Shah - "Shah", Senior Client Support Specialist | support@maxient.com

Four Elements of Data

Think Backwards

Data is what goes into your system. Analytics are what you pull out of your system. Think about what you need to pull out, not what data can you put in.

Wants and Needs

What do you want to know about your process? What information are you asked for? What are you required to report?

Intentionality

Why do you want this data? What will you/others do with it? Is this important to your office mission?

Culture

It's easier to fix mistakes as you go versus finding and fixing them before a deadline. Build auditing and consistent training into your process.

Maxient Analytics

Prebuilt Maxient Reports:

- 7: Case Turnaround Analysis
- 910: Demographic Feed and Configuration Screen Values Crosscheck
- 911: Clery Locations Crosscheck
- 912: Cases with Problematic Dates

Ohio State Institution-created Analytics:

- 1402: Closed Cases without a Hearing Date
- 1460: CRF Audit
- 1470: Case Management – Pending Cases Review
- 1473: Cases for Potential Removal
- 1475: Collin's Law Report
- Multiple Numbers: Clery Crosschecks for campuses

Make a Plan

Step 1: System Configuration

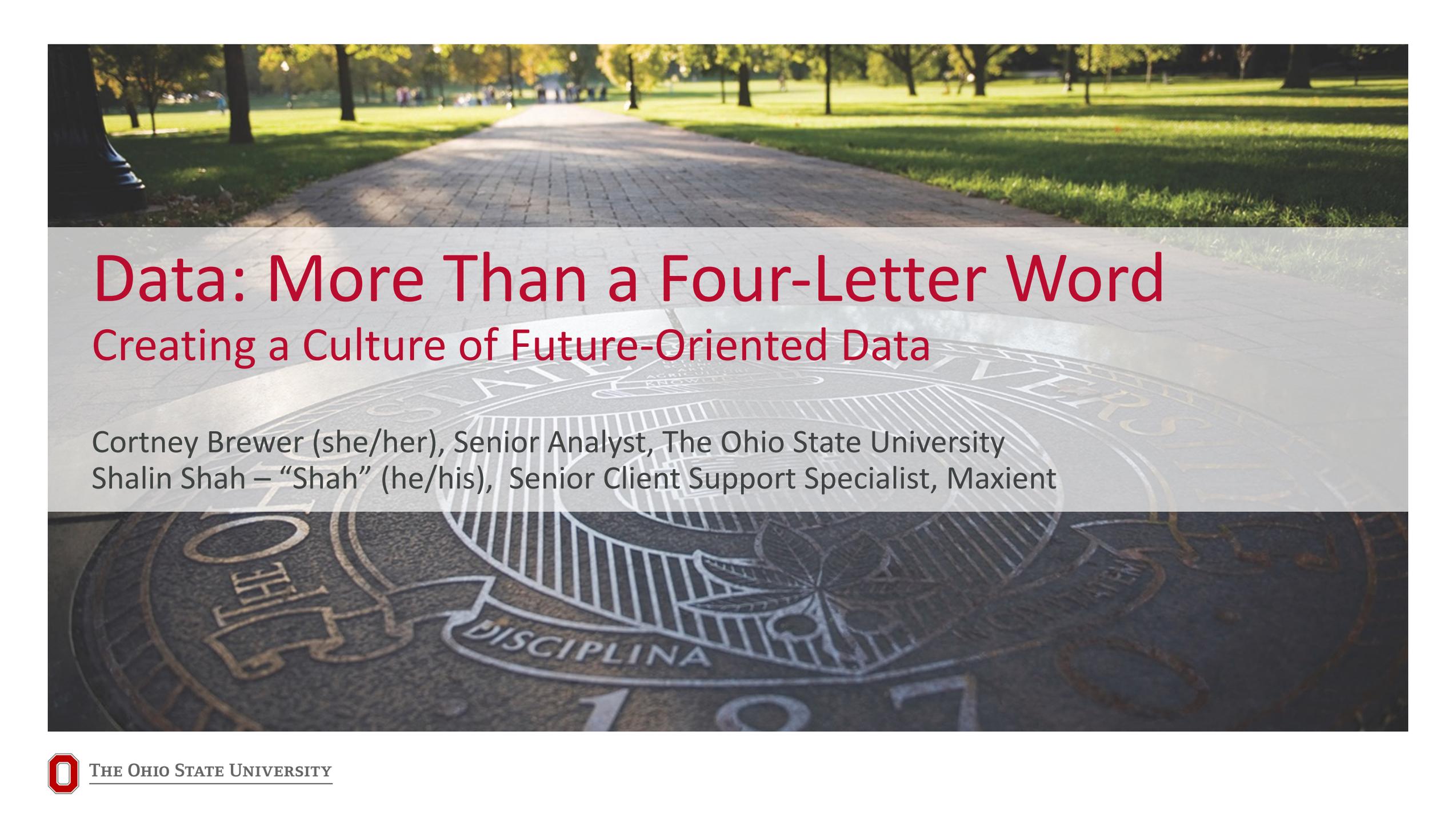
Step 2: Training

Step 3: Audit It

Step 4: Save It

Step 5: Analyze It

Step 6: Use It



Data: More Than a Four-Letter Word

Creating a Culture of Future-Oriented Data

Cortney Brewer (she/her), Senior Analyst, The Ohio State University
Shalin Shah – “Shah” (he/his), Senior Client Support Specialist, Maxient



Learning Outcomes

This program will endeavor to provide the following opportunities for participants:

- Reflect on the data management practices of their offices.
- Highlight examples and practices utilized by one institution to change the culture around data auditing and analysis.
- Share examples of specific system set-up, training and auditing tools that can be applied at any attendee's campus.
- Discuss strategies to make working with data part of the office culture, rather than an emergency or siloed project.

Disclaimer

1. *There is no silver bullet. Data management cannot be fast, easy AND accurate.*
2. *You know your campus, community and needs best.*
3. *Don't be afraid to start small and work your way up.*
4. *There's not one "objective" or "correct" way to collect and analyze data.*



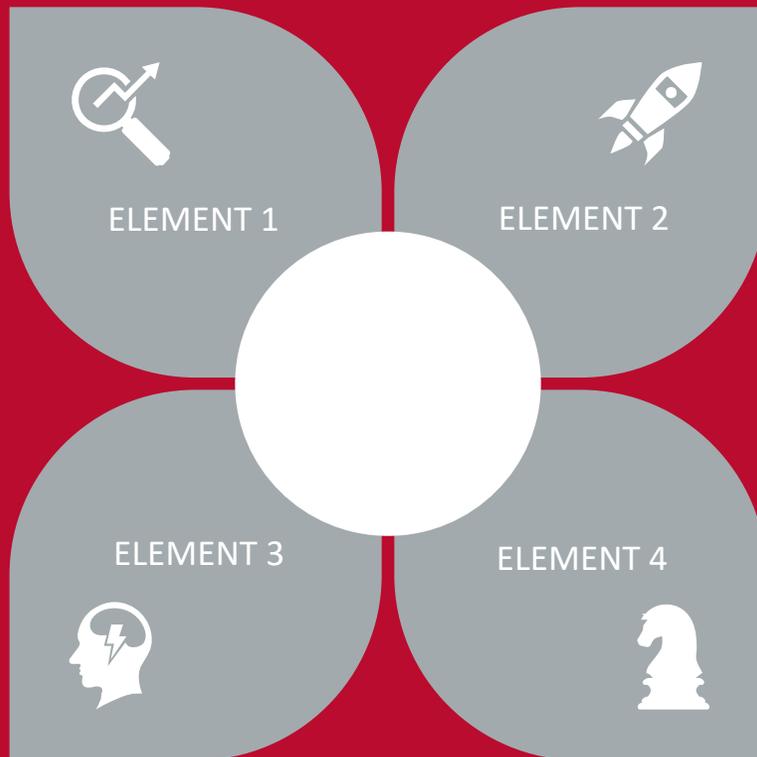
The Four Elements of Data

THINK BACKWARDS

Data is what goes into your system.
Analytics are what you pull out of your system. Think about what you need to pull out, not what data can you put in.

INTENTIONALITY

Why do you want this data? What will you/others do with it? Is this important to your office mission?



WANTS AND NEEDS

What do you want to know about your process? What information are you asked for? What are you required to report?

CULTURE

It's easier to fix mistakes as you go versus finding and fixing them before a deadline. Build auditing and consistent training into your process.



Make a Plan

Thinking about your data as a workflow



STEP 1: SYSTEM CONFIG

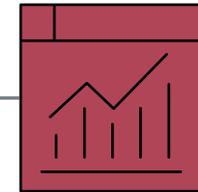
Before the year starts, does your system contain the elements needed to pull robust analytics?



STEP 2: TRAINING

Training your staff and colleagues to input data in a way that will provide the output you need.

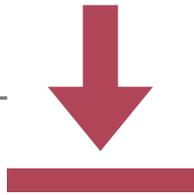
Remember: you don't have time to go back and add it in!



STEP 3: AUDIT IT

Don't let your data overwhelm you. Conduct periodic system checks and audits to ensure that data is inputted accurately and consistency





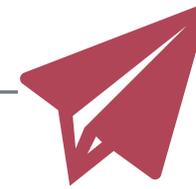
STEP 4: SAVE IT

Keep records on how you created your analytics and report. Be able to recreate the numbers if necessary. Save the raw data - items can change in the system.



STEP 5: ANALYZE IT

Take the raw data and use tools in your spreadsheet program to analyze it. Create graphs, tables or other graphics to help you and others understand what the numbers are showing.



STEP 6: USE IT

What's the point of all this work if you don't use it? Use your annual report to drive programming, resources, and the mission of your office. Analytics are an incredibly powerful influencing tool.



Step 1: System Configuration



Configuration Screen

If you need to get analytics on it, can it be selected in the system?

Check settings for the fields you will need

- *System Elements*
 - *Case Types, Findings, Referral Sources, Note Categories, Tags, Hearing Types, Milestones, Statuses, etc...*
- *Demographics*
 - *Classifications, Ethnicities, Gender, Roles, Affiliations, etc...*
 - *Use Report 910 to compare and crosscheck what your IT is sending versus what is in your system to be manually selected.*
- *Sub-set fields. These affect analytics.*
 - *Case Type Subset, Roles – Terms, Clery*
- *Pre-Defined Dates. These also affect analytics*
 - *This is where semesters and other dates can be defined.*



Additional Demographic Fields

Did you know you can add up to 8 fields to your system?

- Data Feed vs. Manual Entry
 - For Manual Entry
 - Select vs. Multiselect
- Limited to 100 characters
 - *OSU Examples*
 - *Campus, College, Visa Status, Key Date*
 - *Other Common Examples*
 - *Risk Level, Advisor/Support Person, Employee Fields, Graduation Date*

Interested? Reach out to support@maxient.com



GPA Previous Term (before case)	GPA Cumulative (at case)
<input type="text" value="0.000"/>	<input type="text" value="0.000"/>
Campus	
<input type="text"/>	
College	
<input type="text"/>	
BOX Link URL	
<input type="text"/>	
Visa Status	
<input type="text"/>	
Co-Investigator	
<input type="text"/>	
Conduct Advisor/Support Person	
<input type="text"/>	
Key Date	
<input type="text" value="2022-08-05"/>	

Additional Demographic Fields

Found on the Update Existing Case screen under "Demographics"



Potential Pitfalls

- When are you adding too much detail?
 - To break out charges or not to break out charges...
 - Policies often have many layers and there is an inclination to make each bullet a charge which then leads to multiple charges from the same policy on the same case. Think about why you are tracking this and what might be a better way.
 - Ex. Ohio State uses "whole" charges but communicates a summary of why a student is being charged with a particular allegation as part of the charging standard in their notice letters.



Charge and Process Form

Charge(s)

It is alleged that on, or around, January 2, 2023, you engaged or attempted to engage in conduct that includes, but is not limited to:

- *Consuming alcohol under the age of 21*
- *Purchasing and furnishing alcohol to others under the age of 21*

which is prohibited by the following section(s) of the Code of Student Conduct:

- 3335-23-04 (I) Alcohol. Use, underage intoxication, production, distribution, sale, or possession of alcohol in a manner prohibited under law or applicable university policy or facility policy.



Step 2: Training



Training Your Team on Data

- Establish documentation
 - *What elements have been added?*
 - *When and how should we use them?*
- Make it accessible
 - SharePoint/Teams/Drive/Box or Maxient Home Screen
- Help them understand your terms
 - *Your data language may not be what they are used to or how they used them.*
 - *Create a glossary for terms and lingo*



Maxient Configuration Glossary

Setting	Included Information and Rationale/Description
Access Restriction - Required at case creation	Yes - Ensures that different offices using Maxient are selecting an Access Restriction, reducing chance of mistakenly granting access to everyone
Appeal Statuses	<p>also:</p> <ul style="list-style-type: none"> - "No Appeal Filed" - case default - "Appeal Received" - notes case is in appeal consideration - Upheld (Defined by the Student Code of Conduct) - Remanded to correct and/or be reconsidered due to procedural error (Defined by the Student Code of Conduct) - Remanded for disposition due to new information (Defined by the Student Code of Conduct) - "Not Eligible for Review" - appeal submitted but was not eligible for review for reasons such as past deadline or submitted by a party not eligible to appeal (like a parent)
Athletic Teams	NA or Y; Athletic status is determined by Banner and shared in the data feed
Case Types	<ul style="list-style-type: none"> Conduct - Student Conduct Processes Under Review - No Action Yet (Referred for Investigation or awaiting more information) Informational - Clery Reportable, Non-Student, and Alternative Resolution Processes - Maintained for 7 years Non-actionable - Other reports - Maintained for 1 year Records Release - Tracks release of Student Conduct Records - Maintained for TBD years Administrative Action - Cases with Interim Restriction or Interim Suspension Involuntary Withdrawal - Cases for the Involuntary Withdrawal Policy (Dean for Well-being) Training - Training cases for Conduct Officers

Manual Data Feed for Training/Test Cases

- Feature to add individuals to your data feed for use in training/test, Organization or other cases where individuals may not be affiliated with the institution or have a SID
- Requires Level 5 User Level

Logs

Data Feeds ▼

Data Feeds

Status Manually Created Entries

To access a template for uploading, click the "Export CSV" button. If there are no entries on entries, the export will show all of them. Simply delete the entries exported in the CSV file and imported, they will be added to any already listed.

New Edit Delete Export CSV Import CSV Select all Deselect all

ENTRY SOURCE	SID	AUTHENTICATION TOKEN	LAST NAME	FIRST NAME	MIDDLE NAME	PREFERRED NAME
manual	SHAH	SSHAN615	Shah	Shalin	N	Shah



Training/Test Cases

- Ensure training or test cases do not get counted in “real” data
 - Dates
 - Backdating or Removing Dates
 - Specific SID
 - Specific Case Type
- Beware of analytics not using dates, case types, etc. to limit results



Step 3: Auditing



Do a System Health Check

Find your inconsistencies before your data confuses you

- Maxient System Reports (available in your system)
 - Maxient System Reports 901-916
 - 910: Demographic Feed and Configuration Screen Values Crosscheck
 - 911: Clery Locations/Charges Crosscheck
 - 912: Cases with Problematic Dates
- Ohio State Examples (can be created for you)
 - CRF Audit
 - Closed Cases without a hearing date
 - Clery Crosschecks for campuses

Report 910

Classification Values

Values in the Classification field cannot exceed 30 characters. If any entry in the "Configuration" options (middle column) exceeds 30 characters, a warning will appear in the column.

[CSV](#)
[Excel](#)
[Filter Results](#)
[Column visibility](#)

Showing 1 to 1 of 1 entries

Search:

Classification Reported in Demographics Feed	Classification Values Available in Configuration Screen	Classification Reported in Cases
; D1; D2; D3; D4; Freshman; Grad; Junior; L1; L2; L3; M1; M2; M3;	Freshman; Sophomore; Junior; Senior; Graduate; Alumni; Continuing Education; Not Enrolled; Transfer Student; Visitor; Unknown; Facilities; Former; Prospective;	2; 4; 1; 2; 3; 3.30; 4; Address Location; Alumni; Applicant; BUS; C; Continuing; Continuing Education;

Expungement

Don't overcomplicate your data - check your policy and remove cases



POLICY & PRACTICE

Consult office and institutional record retention policies to start your expungement process. Establish an annual cycle for expungement.



FIND & REVIEW

Ask Maxient to build you a report that matches your policy. This will help you identify and review cases for removal.



REMOVAL

Large numbers of cases can be batch deleted by Maxient staff. Export your report, remove personal data and send it to us for removal. Removal will be tracked in your System Log.



Cases for Potential Removal

Showing 1 to 9,363 of 9,363 entries Search:

File ID	Case Type	Status	SID	Incident Date	Reported Date	Case Created Date	Hearing Date	Holds in Place	Sanctions/Actions with Details	Tags
[REDACTED]	ResLife	Closed	[REDACTED]	2012-09-01		2012-10-08				
[REDACTED]	ResLife	Closed	[REDACTED]	2012-09-01		2012-10-08				
[REDACTED]	ResLife	Closed	[REDACTED]	2012-10-27		2012-10-30	2012-11-01			
[REDACTED]	ResLife	Closed	[REDACTED]	2012-11-02		2012-11-07	2012-11-14			
[REDACTED]	ResLife	Closed	[REDACTED]	2013-01-11		2013-01-11	2013-01-16		Disciplinary Probation BEGIN: 2013-01-16 END: 2013-08-17 Substance Assessment- Alcohol DUE: 2013-02-28	

Custom Analytics

- Batch Updates
 - *Requires Level 5 access AND special authorization*
- What you can do vs. when to ask Maxient support
 - *Access Restrictions – Maxient Support*
 - *Hearing Officer Titles – Maxient Support*

Make batch changes

Advanced - Make Batch Changes

[Learn about Batch Changes](#)

Analytics that include FILE_ID allow for batch changes to be made. You must be **VERY SURE** of the change you intend to make **BEFORE** you make the change.

For the records selected above:

Change **LAST_NAME** to

New value

Change **SID** to

New value

Change **FIRST_NAME** to

New value

Making Data Auditing a Routine

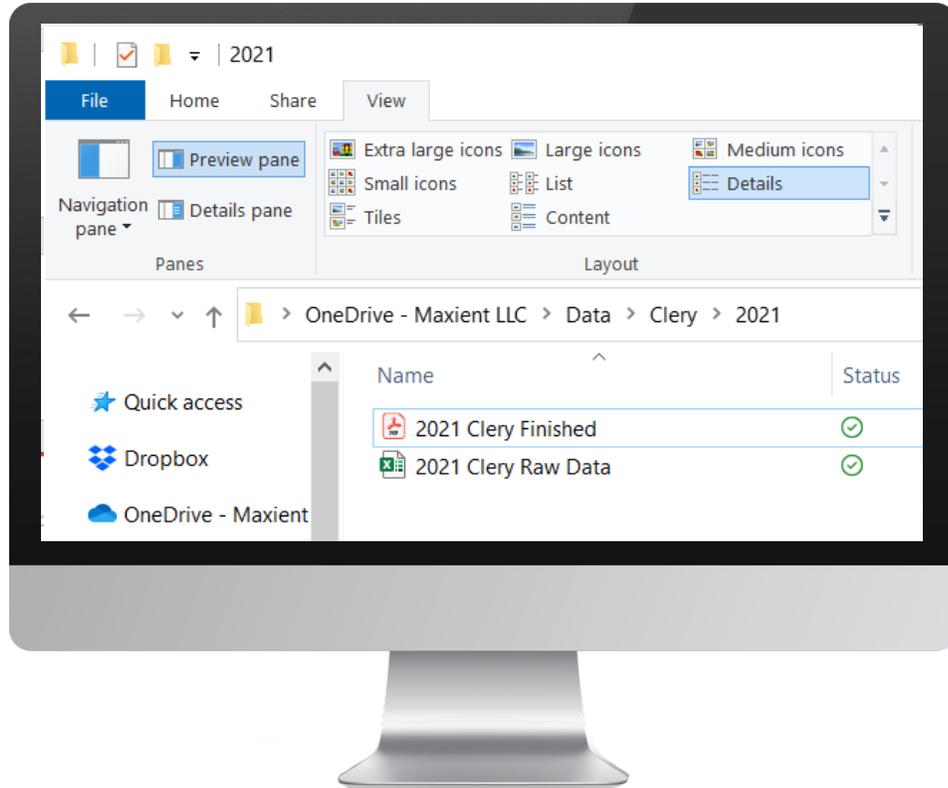
- Monthly auditing practices
 - CRF completion
 - Cases closed with incomplete sanctions
 - Cases open with no deadline
 - Departmental trackers
- Bi-monthly Clery auditing
 - Review key Clery fields: Incident Date, Reported Date, Clery Reportability/Rationale, Report Number



Step 4: Save It



Save the Raw Data



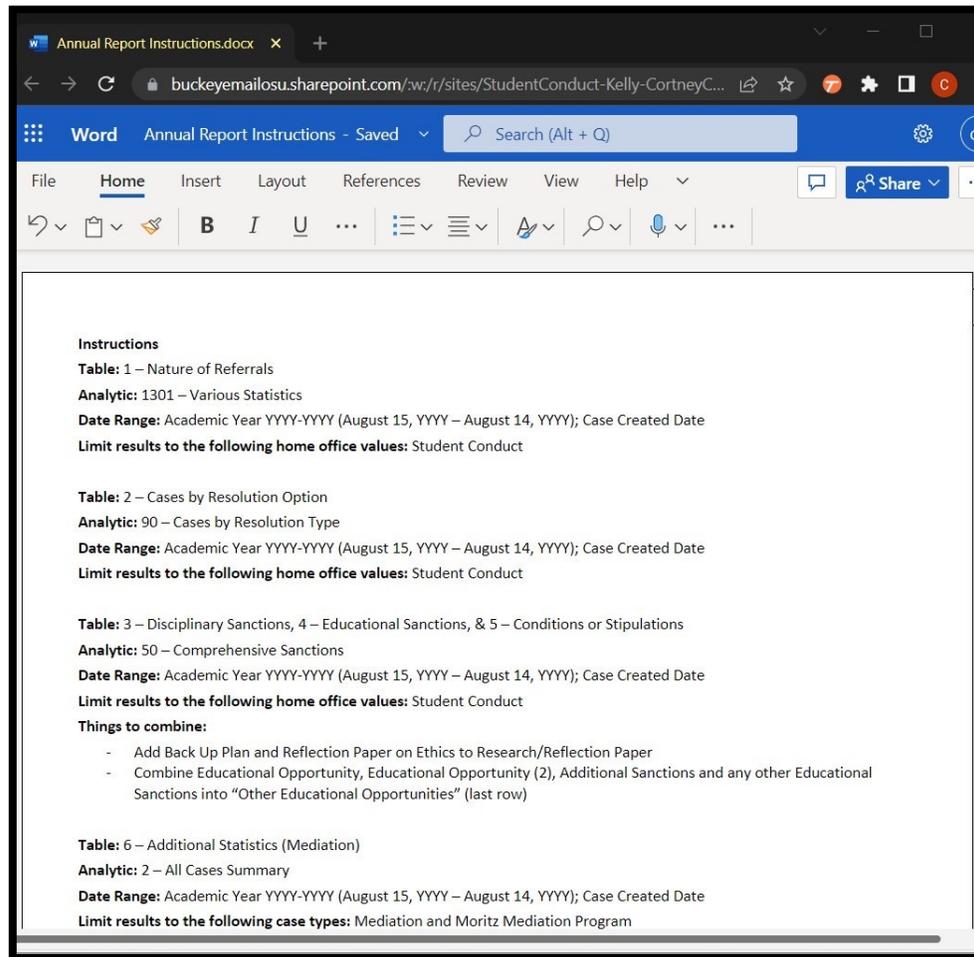
Your system and your data are dynamic. Save the raw data you worked with in order to reference in the future if questions arise.

Make sure to remove sensitive information and depersonalize – do not create a shadow database.

Make sure that this lives on a shared or collaborative storage space.



Help Yourself Next Time



- Creating a consistent data culture involves operating with consistency.
- Ask yourself the following questions:
 - *What analytic(s) did I use?*
 - *What date range did I use?*
 - *Which date of reference did I select?*
 - *Did I need to limit results by case type or home office?*
- Document this information and retain it in the same place you retain your raw data or finalized reports to reference the next time you run the analytics.



Step 5: Analyze It



Analyze & Share Your Data

- Get back to basics
 - *Why did I collect this data?*
 - *What does it show me?*
- Make it visual
 - *Excel is great. Excel isn't pretty.*
- Connect it to the viewer
 - *What are the viewer's interest and priorities?*
 - *Will they understand our terminology?*
 - *How will they use this data?*
- Make it accessible
 - *Where and how are you publishing this data?*



Analytic Options

Match them to your data and configure variables

1. *Date Range*
2. *Reference Dates*
3. *Limiters*

Analytics

Pre-coded Analytics

Choose your report

1 - Snapshot of process

Choose a date range or provide one

Last 7 days

Choose the date of reference

Incident Date Hearing Date Case Created Date Reported Date

Limit results to the following case types

Click here to select one or more case types ...

Limit results to the following home office values

Click here to select one or more offices ...

Run this report

1

2

3



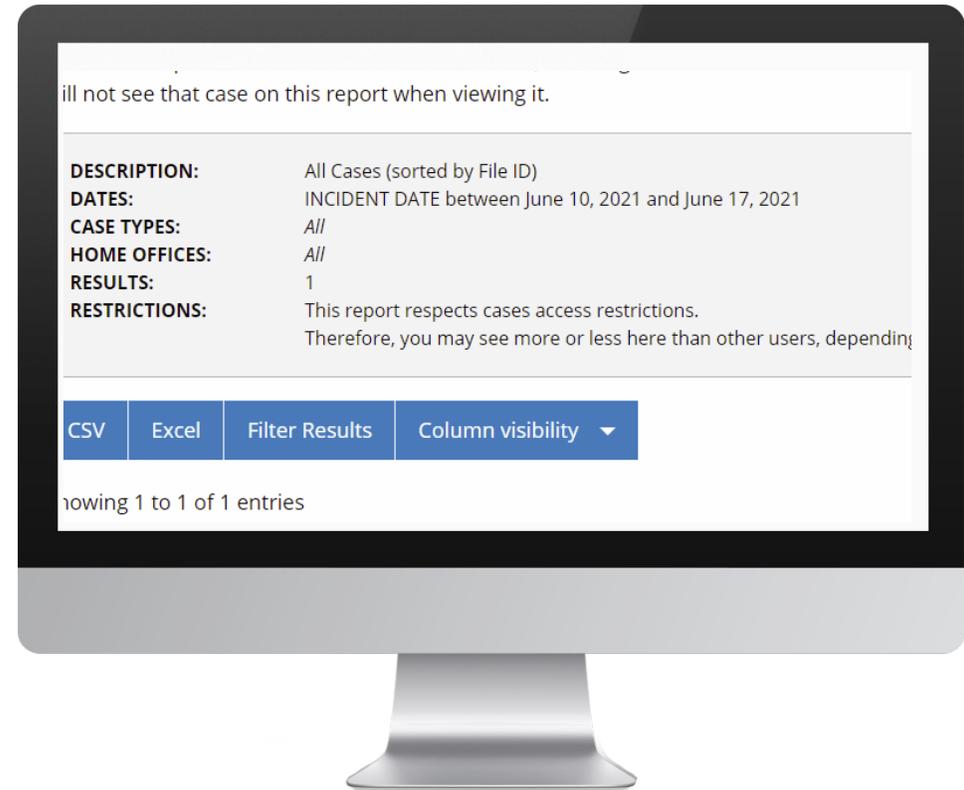
Use all of your tools – not just Maxient

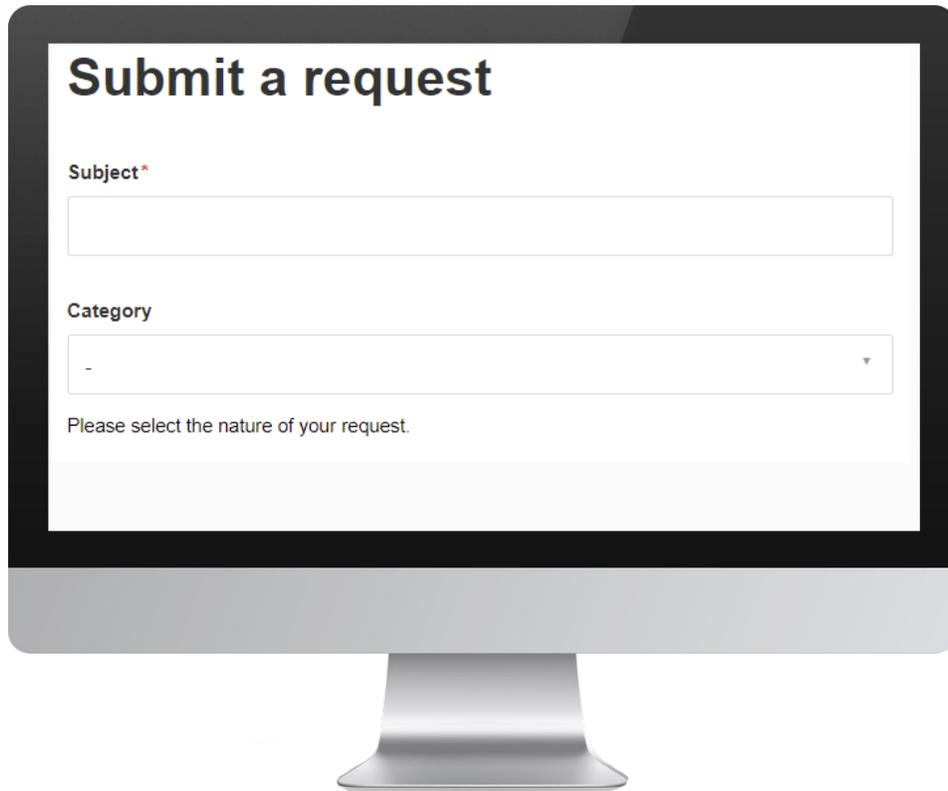
Use other software to help

All Maxient reports in your system can be exported in multiple formats (CSV or Excel). Look for the eponymous buttons under the legend.

Use tools and skills you already have to manipulate and create visual representations of your data.

Your system is great at pulling data but it's not a panacea.





Contact Maxient

Did you know that Maxient can build reports just for your institution? Do you have a data point that you need help tracking in the system? We can help you work backwards and discuss how to best structure this in your system.

OSU has more than 200 reports like this. There is no cost for this – it's part of your system!

Step 6: Use It



Use Your Data

You've done all this hard work - use it to tell your story and aid in reflection, assessment and future decision-making



Reflection

You know you are busy. You know you had a lot of meetings. Use data to help tell your story and capture the qualitative elements of your process.



Assessment

The future is data-driven. Does your data show the results expected? Are you working towards the institutional, divisional and office mission and goals?



Future Decision Making

Use the data you've collected to inform and support future departmental or program decision making. Decisions informed by data will always be easier to sell to stakeholders and senior staff.

Annual Reporting

Table 1

Nature of Referrals	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
Alcohol					
Drug					
Sexual Misconduct					
Academic Misconduct					
Discrimination					
Failure to Comply					
Hazing					
Housing Policy					
Disruptive or Disorderly Conduct					
Endangering Behavior					
Rioting					
System Conduct Abuse					
Theft or Property Damage					
Other Rules or Policies					

Case Management – Pending Cases Review

Days Since Case Creation	File ID	Materiality Rating	First Name	Last Name	Status	Assigned To - Name	Deadline	Deadline Reason	Incident Summary
53	[REDACTED]	1	[REDACTED]	[REDACTED]	Open - Investigation (Individual)	Kirby Bell (She/Her)	2023-01-13	Work on meeting notes	[REDACTED]
87	[REDACTED]	4	[REDACTED]	[REDACTED]	Open - Outcome Pending	Krystal Reeb (she/her)	2023-01-13	Send Outcome Letter	[REDACTED]
46	[REDACTED]	1	[REDACTED]	[REDACTED]	Open - Charged	Kirby Bell (She/Her)	2023-01-17	Determine outcome	[REDACTED]
64	[REDACTED]	1	[REDACTED]	[REDACTED]	Open - Outcome Pending	Krystal Reeb (she/her)	2023-01-19	UCB Hearing Completed - Outcome Pending	[REDACTED]
91	[REDACTED]	1	[REDACTED]	[REDACTED]	Open - Hearing Scheduled	Kelly B. Smith (she/her)	2023-01-20	UCB Hearing	[REDACTED]

Case Resolution and Turnaround

Date Range	AY 21	AY 21	AY 22	AY 22	Trend	Trend
8/15 to	Cases Heard	Turnaround	Cases Heard	Turnaround	Cases Heard	Turnaround
8/23	5	36.4	4	52.3	✓	-1.0
8/30	12	29.1	7	75.5	✓	-5.0
9/6	28	17.6	16	44.5	✓	-12.0
9/13	36	15.6	113	17.9	✗	77.0
9/20	42	20.6	127	17.6	✗	85.0
9/27	56	19.2	144	16.9	✗	88.0
10/4	84	21.1	187	17.3	✗	103.0
10/11	116	19.2	210	19.5	✗	94.0
10/18	129	19.4	237	19.6	✗	108.0
10/25	151	19.2	326	16.4	✗	175.0
11/1	184	20.4	356	17.9	✗	172.0
11/8	215	19.9	363	18.0	✗	148.0
11/15	228	20.1	373	17.8	✗	145.0
11/22	265	20.5	414	17.3	✗	149.0
11/29	293	19.7	421	17.3	✗	128.0
12/6	369	19.2	438	17.5	✗	69.0
12/13	389	19.3	458	18.2	✗	69.0
12/20	421	19.5	475	18.6	✗	54.0



Anti-Hazing Report

Case Number	File ID	Last Name	Notice of Charges	Incident Date	Hearing Date	Charges and Findings	Collin's Law Notes	Sanctions/Actions
[REDACTED]	[REDACTED]	[REDACTED]	2018-02-23	2017-11-03	2018-03-22	3335-23-04 (J) Alcohol - In violation 3335-23-04 (M) Hazing - In violation	It was reported that 11 individuals participated in putting on an event that encouraged and/or required new members to perform calisthenics, go into a closet, consume alcohol under the age of 21 and give up their phones. These activities, whether or not they were voluntarily agreed upon, caused or created a substantial risk of causing mental or physical harm or humiliation. In addition, the 11 individuals purchased, and/or contributed fiscally, to purchasing alcohol used at the event.	Disciplinary Probation Additional Sanctions
[REDACTED]	[REDACTED]	[REDACTED]	2018-02-23	2017-11-03	2018-03-22	3335-23-04 (J) Alcohol - In violation 3335-23-04 (M)	It was reported that 11 individuals participated in putting on an event that encouraged and/or required new members to perform calisthenics, go into a closet, consume alcohol under the age of 21 and give up their phones. These activities, whether or not they were voluntarily agreed	Disciplinary Probation Additional Sanctions

Collin's Law Report 2022-2023

Published January 11, 2023

Eleven individuals

Incident Date: 2017-11-03

Charge Date: 2018-02-23

General Description

It was reported that 11 individuals participated in putting on an event that encouraged and/or required new members to perform calisthenics, go into a closet, consume alcohol under the age of 21 and give up their phones. These activities, whether or not they were voluntarily agreed upon, caused or created a substantial risk of causing mental or physical harm or humiliation. In addition, the 11 individuals purchased, and/or contributed fiscally, to purchasing alcohol used at the event.

Resolution Date

2018-03-22

Violations and Sanctions

Violations

3335-23-04 (J) Alcohol - In violation
3335-23-04 (M) Hazing - In violation

Sanctions

Disciplinary Probation
Additional Sanctions

The screenshot shows a web browser window with the URL stophazing.osu.edu/violations. The page title is "HAZING PREVENTION". Under the "Violations" section, there is a link to a PDF report: "Collin's Law Report (5065 Kb PDF)". The text below the link states: "Hazing violations report in compliance with Collin's Law: Ohio's Anti-hazing Act".



Closing Thoughts



New to your institution? New to data?

- Engage in a beginner's mindset
- Familiarize yourself with the culture, language and priorities of the institution
- Utilize your investigative skills – ask questions



Interested in one of the OSU Analytics?

When you contact support@Maxient.com to request a new analytic, let them know that you attended this session and reference the Analytic number provided:

- CRF Audit: 1460
- Case Management – Pending Cases Review: 1470
- Closed Cases without a hearing date: 1402
- Clery Crosschecks for campuses: Many!
- Cases for Potential Removal: 1473
- Collin's Law Report: 1475

Stay in Touch & Survey

Cortney

Senior Analyst

Consultation and Assessment Team and
Maxient

The Ohio State University

brewer.412@osu.edu

go.osu.edu/cortneybrewerexternalbookings

**Complete the
survey in
Guidebook!**

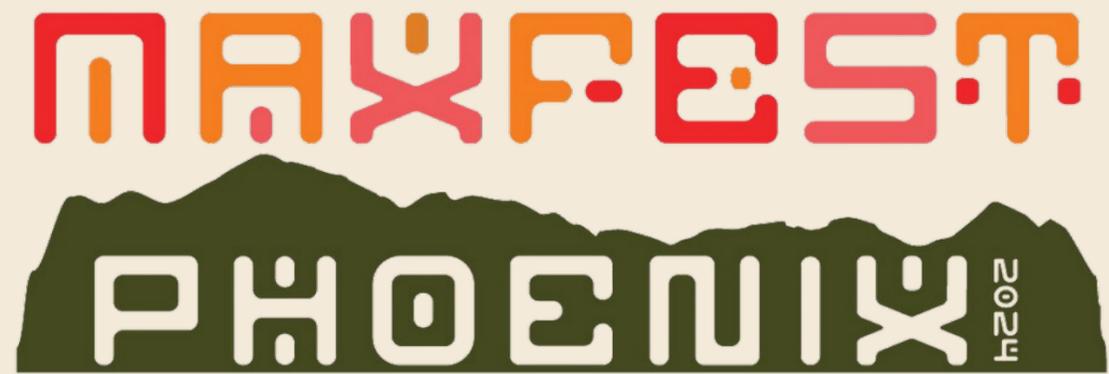
Shah

Senior Client Support
Specialist

Maxient, LLC

[Submit a Support Request](#)

support@maxient.com



Data Feeds and Authentication

It's a party!



Mike Ferrara

Director of Client Implementations

DATA FEEDS

- *Demographics*
- *Schedules*
- *Photos*

CAMPUS BASED AUTHENTICATION

- *SAML*
- *CAS*
- *LDAP/AD*

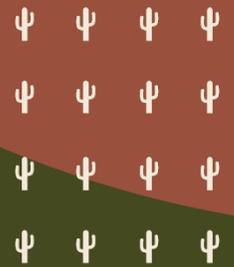


WHAT ARE DATA FEEDS?



Data Feed Notes

- *Function like a telephone directory on a shelf.*
- *Recommend that the Demographics and Schedules are sent daily.*
- *Recommend to include persons who are currently enrolled, those enrolled the previous term, and those who are already signed up to be enrolled in a future term.*



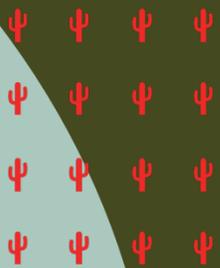
Demographics Feed

- *The more fields, the better!*
- *New(ish) Fields*
 - *Preferred Name/Honorific/Pronouns*
- *Custom/OTHER Fields*
- *Employees/Other Populations*

```
01234567|masmith|Smith|Mary|Ann|MaryAnn|1990-04-15|Female| ...
55555555|bwilson|Wilson|Brian|||1990-05-25|Male| ...
```

Your search produced 5 results.

	SID	NETWORK USERNAME	LAST NAME	FIRST NAME	MIDDLE NAME	NICK NAME	DOB	GENDER	ETHNICITY	HOUSING	ROOM	LOCAL ADDRESS	LOCAL
Select  	987654108		Scannon	Lou			0000-00-00	Male	Caucasian			Reading Hall	402
Select  	987654013		Schneider	William	Charles	Creed Bratton	1969-12-06	Male	Caucasian	Tucker House	205	Box 47892	Campus
Select  	777777777		Schrute	Dwight	Kurt		1995-10-01	Male	Caucasian	Breese Hall	1014	Box 54643	Charlotte



Schedules Feed

- *Current Class Schedule*
- *Used to aid scheduling of meetings, hearings, etc.*
- *Not manipulated in any way, displayed as appears in text file*
- *Exact layout up to school and SIS options*



Line 1: Student unique identifier
Line 2+: Schedule content as you wish it to display
Final line: ***** (10 asterisks)

An example file might appear as follows:

```
01234567
CHEM 111 MWF 10:10-11:00
ECON 102 TTh 9:00-10:15
*****
55555555
FREN 105 MW 8:00-10:00 Prof. Jones Capstone Hall 302
LAWS 303 MWF 11:00-12:15 Prof. Smith Admin Bldg 107
*****
```

Michael Scott's schedule ...

```
ENGR 151 TTh 8:00-9:15 CLS Lab
SPAN 121 MWF 12:20-1:10 Jones 303
SPAN 201 MWF 2:15-3:05 Jones 305
MATH 180 W 1:00-4:00 Davis 250
```

Other people in the case:

Dwight Schrute *Alleged* 2021001301

```
ENGR 151 TTh 8:00-9:15 CLS Lab
SPAN 121 MWF 12:20-1:10 Jones 303
SPAN 201 MWF 2:15-3:05 Jones 305
MATH 180 W 1:00-4:00 Davis 250
```

Pamela (Pam) Halpert *Victim* 2021001303

```
ECON 223 TTh 10:00-11:15 McMaster
ENGR 111 MWF 3:25-4:15 Swearn 303
BUSI 225 MWF 1:25-2:15 Coker 305
ENGL 234 W 8:00-10:00 Davis 250
```

Images Feed



- *OPTION 1 - School created webservice*
- *OPTION 2 - SFTP of jpegs*





Manually add items to the Data Feed

- For Training Purposes
- For Organizations

Add single entries, or a spreadsheet

Create new entry

SID: MAXTURTLE

LAST NAME: Turtle

FIRST NAME: Maximus

MIDDLE NAME:

PREFERRED NAME: Max

DOB:

GENDER:

ETHNICITY:

Logs

Data Feeds

Data Feeds

Status: Manually Created Entries Visible to Maxient Staff Only

To access a template for uploading, click the "Export CSV" button. If there are no entries on this screen, then the template will be blank. If there are entries, the export will show all of them. Simply delete the entries exported in the CSV file and begin entering your new individuals/organizations. Once imported, they will be added to any already listed.

New Edit Delete Export CSV Import CSV Select all Deselect all Search:

ENTRY SOURCE	SID	LAST NAME	FIRST NAME	MIDDLE NAME	PREFERRED NAME	DOB	GENDER	ETHNICITY	HOUSING	ROOM	LOCAL ADDRESS	LOCAL CITY
manual	MAXTURTLE	Turtle	Maximus		Max							Off Campus

Showing 1 to 1 of 1 entries

Campus Based Authentication

Use institutional credentials to log in to Maxient

And.....

OTHER FEATURES

- *People Finder*
- *Letter retrieval*
- *IR Authentication*

The image shows two overlapping web forms. The top form, titled "Background Information", has a yellow header and contains three input fields: "Your full name:", "Your position/title:", and "Your phone number:". To the right of the first field is a link that says "Enable additional features by logging in." with an external link icon. Below the first field is a "Learn more" link with an information icon. The bottom form, titled "Involved Parties", has a yellow header and contains a text area with the instruction "Please list the individuals involved please list an SSN or Drivers License". Below this is a search input field labeled "Name or Organization" with a person icon and an external link icon.

The image shows a "People Finder" search form with a white background and a blue border. It includes a title "People Finder" and a close button (X) in the top right corner. Below the title is a paragraph of text: "Items typed are automatically wildcarded. For example, entering a first name of Rob and housing of Jones Hall will return both Rob Wilson and Roberta Smith, both of whom live in Jones Hall." Below this text are five input fields: "First Name", "Last Name", "SID", "Housing" (a dropdown menu), and "Room #". A blue "Search" button is located at the bottom left of the form.

Quick Fix vs Longer Term

*System ready for it but
you just need to have it
turned on?*

VS

*You need to get IT
involved*

Ask Us!

*No harm with opening
a support ticket –
support@maxient.com*

*Share IT contact so we
can “talk tech”*

Final Thoughts

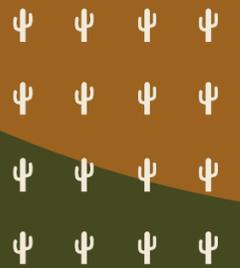




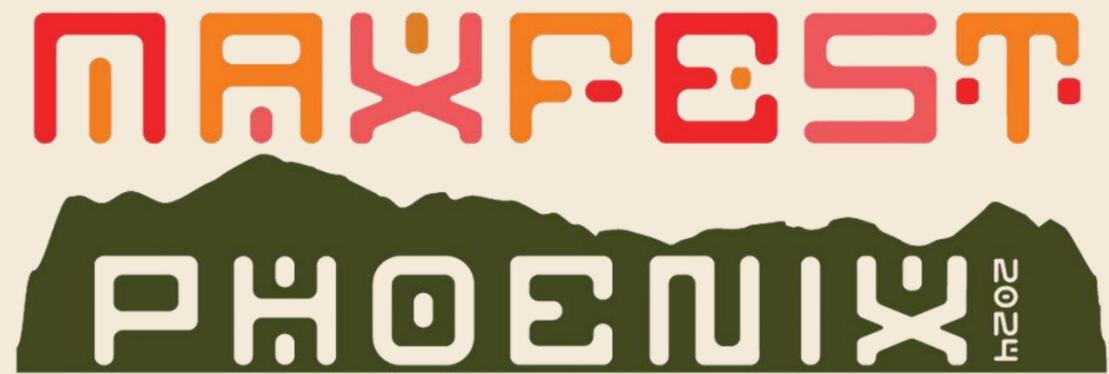
Questions?



Thank You!



Survey. Guidebook. Please.



Everyday I write the Notes

Note Features and Functions of Maxient



Trisha Hetue

Senior Client Support Specialist

Universal Notes

- Show up in all files for an involved party
 - *Common use: FERPA waivers on file,*
- Open text field to type in
- User levels 3, 4, & 5 can add/edit on the Update screen

Update Existing Case

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS NOTES OTHER



Case Type: Academic Integrity

First Name: Stanley Middle Name: James

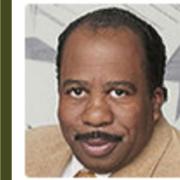
Honorific: Preferred Name: Pronouns:

Ⓟ This individual has 4 other cases.

Universal Notes: FERPA release *It shows up in all files for Stanley Hudson's cases, and are visible by all users.*

SID: 987654002 Classification: Staff

Find People > Detail



Listing of all names found on all cases for this individual

Stanley James Hudson
Stanley James "Stan" Hudson

Demographics

SID: 987654002
DOB: 2002-03-24

Universal Notes

FERPA release

5

CASES FOUND

- Academic Integrity - 1
- Student Conduct - 1
- Access restricted - 3

Case History

2022000303

Academic Integrity

Alleged



Incident Date: September 6, 2022

Status: **Open**

Assigned To: RHD - Tucker House (Kevin Kwan)

Resolution Type: No CRF on file

Resolution Date:

General Notes

- First note function in Maxient
- User levels 3, 4, & 5 can see/access on Update screen in Notes tab
- Any user can add, modify or delete text from this field



Update Existing Case

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS **NOTES** OTHER ADMIN

Individual Notes (0) General Notes / File History (0 words)

Notes written here are visible and modifiable by anyone with access to this screen.

2024-06-21 -- T, Hetue
Stanley was wearing a ballcap and seemed nervous speak with me.
=====

2024-05-18 -- N. Juster
Staley waved as he walked put to class today

Save updates (saves all tabs above)

Individual Notes

- Time & Date Stamped
 - *No future dates*
- Organize
 - *Categories*
 - *Subjects*
- Attached to
 - *File ID*
 - *All Involved*
- Visibility
 - *Shared*
 - *Private*

Individual Notes (0) General Notes / File History (0 words)

Note Ping Both [X Cancel this note](#)

Date: Time: Visibility: Shared Private

Attached to: This File ID All case parties

Note Categories: Time Spent:

Note Subject:

Note/Ping Content:

Ping recipient(s):

Let the recipients see who received this notification

To be saved or emailed, a note must have a note subject or note content. For sending a ping only, the note content is optional. This note, and all other updates, will save, and if applicable, send upon clicking "Save updates" at the bottom of the page.

Note? Ping? Both?

Update Existing Case

2021002002 Meredith Elizabeth Palmer (987654006)

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS **NOTES** OTHER ADMINISTRATIVE

Individual Notes (0)

General Notes / File History (0 words)

Note Ping Both

[X Cancel this ping](#)

Date

2024-06-21

Time

Visibility:

Shared

Private

Attached to:

This File ID

All case parties 

Note Categories

Time Spent

In minutes

Note Subject

Enter Subject

Note/Ping Content

Enter Note

Ping recipient(s)

Click here to select recipient(s) ...

Let the recipients see who received this notification

To be saved or emailed, a note must have a note subject or note content. For sending a ping only, the note content is optional. This note, and all other updates, will save, and if applicable, send upon clicking "Save updates" at the bottom of the page.

Tracking Time Spent

- Was new in 2023
- Available on the Create New and Update Existing screens 
- Time added as whole integers in a total number of minutes 
 - *i.e. an hour and half is entered as 90 in the time spent field*
- Edit the amount by clicking on the number of minutes
 - *Total time Spent is recalculated the next time the screen loads*

Edits to Notes

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS **NOTES** OTHER ADMINISTRATIVE

Individual Notes (1) General Notes / File History (0 words)

Add another note / ping Total time spent: 20 minutes

Delete note

 Norton Juster - Friday June 21, 2024 at 1:00pm (Note # 433)
Last edited Friday June 21, 2024 at 5:51pm

minutes

Note Analytics

- 67 – Note Subjects by Case Type and Home Office
- 68 – Note Subjects by Case Type and Home Office Based on Date of Note
- 152 – Note Categories by Case Type and Home Office
- 153 – Note Categories by Case Type and Home Office Based on Date of Note
- 155 – Time Spent on Files by Category
- 156 – Time Spent by Category and Staff

Note Analytics

156 Time Spent by Category and Staff 152 - Note Categories by Case Type and Home Office Based on Date of Note

LEGEND

USER

LEGEND: Report displays a table for each home office tab showing a count of case note categories by the case type for **notes created** during specified date range. Note categories for "private notes" are not included.

by

Home Office of 'Office of Student Conduct'

DESCRIPTION: Note Categories by Case Type Where Home Office = "Office of Student Conduct" for notes created between June 14, 2024 and June 21, 2024
DATES: INCIDENT DATE between June 14, 2024 and June 21, 2024
CASE TYPES: All
HOME OFFICES: All
RESTRICTIONS: This report ignores case access restrictions.

CSV Excel Filter Results Column visibility

Showing 1 to 4 of 4 entries

Search:

Note Category	Academic Integrity	Student Conduct	Total
Assessment	1	0	1
Email	0	1	1
Risk Level Change	0	1	1
Text Message	0	1	1
TOTALS	1	3	4

Showing 1 to 4 of 4 entries

green

Sneak Peek at Upcoming Feature: Sort & Search Notes

Update Existing Case

2023000701 Jim Halpert (Disability)

Individual Notes (29)

General Notes / File History (0 words)

CASE DEMOGRAPHICS CONTACT INCIDENT EFC ASSIGNMENT RESOLUTION ACTIONS TASKS **NOTES** OTHER ADMINISTRATIVE

Individual Notes (1)

General Notes / File History (0 words)

Add another note / ping

Total time spent: 20 minutes

Walk In Meeting

Save edits Cancel

Delete note

Walk-In

Save edits Cancel



Norton Juster - Friday June 21, 2024 at 1:00pm (Note # 433)

Last edited Friday June 21, 2024 at 5:51pm

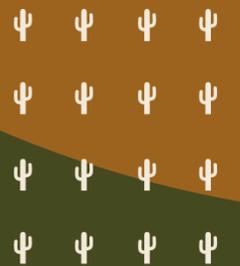
20 Save edits Cancel

minutes

Meredith and Pam came to my office after class to discuss their incident.

Save edits Cancel

Thank You!



**Please complete the evaluation for this program found in
Guidebook to help us plan for future MaxFests.**



EXCELLENCE

EVOLVING

**Transforming Dean of Students' Files into an Online Oasis
for Student Assistance – A Four-Year Data Odyssey**





INTRODUCTION

Britt Hudson
(she/her/hers)

Assistant Dean of Students
Purdue University Northwest-Hammond, Indiana



PURDUE UNIVERSITY NORTHWEST

Office of the Dean of Students



BACKGROUND

Summer 2019

- For the first month on the job, I was tasked with transitioning our Student Assistance paper intake process to a digital one.
- ODOS intake process led to 8, 5 drawer file cabinets full of files!
- PNW has had Maxient since 2013 solely in a conduct capacity
 - Qualtrics/Excel was used to track and assess the fields on the intake form.



BACKGROUND



Why not use the system our institution pays thousands for each year?

Started with 6 years of Maxient Conduct experience in Housing.

Office of the Dean of Students Intake Form

*Name: [REDACTED] *Phone: _____

*In Regards to: _____

*PUID: [REDACTED] *Preferred Email [REDACTED]

Providing this email does not exempt you from checking your Purdue Northwest email.

*I am a:

- Calumet Student North Central Student Staff Member
- Family / Friend of a Student Faculty / Instructor Other

*I am here in regards to (check all that apply):

- Academic Concern Disability Access Center Registrar
- Administrative Financial Aid Respect Boundaries *NO ACCESS*
- Admissions Housing Student Assistance
- Advisor Instructor/Faculty Student of Concern
- Background Check IT Student Organizations
- Bursar Medical Veteran Services
- Childcare Outreach / Programs Withdrawal
- Complaint Readmission Miscellaneous
- Conduct
- Counseling

*Please describe the specific issue(s) you would like to discuss today:

*How were you referred to the Office of the Dean of Students for assistance?

FOR OFFICE USE ONLY

*Please Circle College: ES CHESS TECH NURS BUS **ACE** HNRS GRAD N/A

*Date: 9-29-16 *Duration of Meeting: 10 min *ODOS Staff Member: [Signature]

*Contact Code:

- Phone Call
- Walk-In
- Appointment
- Email
- Mail
- Fax

**Make sure these items are completely filled in before entering in Qualtrics.*

OBJECTIVES

MAIN OBJECTIVES

- Move Intake Form to Maxient
- Get our \$7K worth from the system!
- Make our Student Assistance program more efficient and accessible

SECONDARY OBJECTIVES

Create case types, tags, IRs that would allow us to track interactions with students and assess our impact

PLANNING

STEP 1

Turning the intake form into a Maxient IRs

STEP 2

Train staff on process and work out the kinks

STEP 3

Start the 'clean up' process of modifying



Office of the Dean of Students Intake Form

Please fill out the information to the best of your ability and hit submit at the end. If you have questions, please ask one of the Office of the Dean of Students staff members.

Background Information

Office of the Dean of Students Staff Only

[Enable additional features by logging in.](#)

ODOS Staff Member Name:

Your position/title:

Contact Code *(Required)*:

ODOS Staff Member

Requested *(Required)*:

[Learn more](#)

Date *(Required)*:

Time:

Office *(Required)*:

Office (Required):

Please put full name (first and last name) below

Name	ID Number	Phone number (Include area code)	Email address
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add another party](#)

Please fill out all of the following information to the best of your ability:

Home Campus: (Required)

- Hammond
- Westville
- Both

I am a (check all that apply):

- | | | |
|---|---|--|
| <input type="checkbox"/> Current Student | <input type="checkbox"/> Former Student/Alumni | <input type="checkbox"/> Staff Member |
| <input type="checkbox"/> Coach | <input type="checkbox"/> Graduate Student | <input type="checkbox"/> Student Athlete |
| <input type="checkbox"/> External Entity/Person | <input type="checkbox"/> Housing Resident | <input type="checkbox"/> Veteran Student |
| <input type="checkbox"/> Faculty / Instructor | <input type="checkbox"/> International Student | |
| <input type="checkbox"/> Family / Friend of a Student | <input type="checkbox"/> Member of a Student Organization | |

I am looking for ODOS assistance with (check all that apply):

- Academic Concern
- Admissions/Re-entry/Readmissions
- Advisor Concern
- Advisor Information
- Alumni Information
- Bookstore
- Bursar/Student Accounts/Refund
- Conduct
- Counseling Center
- Disciplinary or Background Check
- Employment
- Financial Aid
- Grade Appeal
- Grief Absence
- Housing (On or Off-Campus)
- IS/Technology
- Jury Duty Absence
- Medical Concern/Absence
- Military Absence
- NSO/The Point
- Outreach/Programs
- PNW Accessibility Center (PAC)
- Professor/Faculty Member
- Registrar
- Respect Boundaries
- Student Grievance
- Student Leadership
- Student Organizations/Events
- Student of Concern
- TRIO/EOP
- Title IX
- Tutoring
- Veteran Services
- Withdrawal Assistance
- Writing Center

Please describe the specific issue(s) you would like to discuss today:

How were you referred to the Office of the Dean of Students for assistance?

SUBMIT THAT TICKET!



IR Layout 'Office of the Dean of Students Intake Form' Report

Questions Key:

Q1. Home Campus:

Q2. I am a (check all that apply):

Q3. I am looking for ODOS assistance with (check all that apply):

Q4. Please describe the specific issue(s) you would like to discuss today:

Q5. How were you referred to the Office of the Dean of Students for assistance?

Hammond

Current Student

*Academic Concern,
Counseling Center,
PNW Accessibility
Center (PAO),
Registrar, Student
Grievance*

Westville

Current Student

*Academic Concern,
Bursar/Student
Accounts/Refund*

ADDING MORE IRS

GAPS

Grief Absence Policy

- Documentation upload
- Dates out of class
- Any previous communication with professors

DOCUMENTATION

- Absence Notifications
- Student Assistance Support documents
- Information

EMERGENCY FUND

- Parameters around Financial Aid/Cost of Attendance
- Amount requested
- Supporting Documentation
- FAFSA filed

IRS ADDED FROM THIS PROCESS

- Student Grievance Form
- PNW Accessibility Center Information to ODOS
- Office of the Dean of Students: Student Documentation Form
- Office of the Dean of Students: Grief Absence Request
- Office of the Dean of Students- Military Absence Request Form
- Office of the Dean of Students- Jury Duty Absence Request Form
- Office of the Dean of Students Emergency Fund Application

CONFIGURATION-TAGS

Emergency Fund Approved;
Emergency Fund Denied;
Grief Absence Request Approved;
Grief Absence Request Denied;
Title IX-Pregnancy;
Title IX-Non EDI;
Deceased Student;
WD For Non-Attendance;
MIA Student;
Dean Assigned;
PAC Referral;
PAC Withdrawal;
Advisor Referral;
Diversion Program;
Dual Credit;
Name Change Assistance;
Athletics Referral;
Professor Communication Concern;
Advisor Communication Concern;

Military Absence Policy;
Transportation Concern;
OIE Referral;
Complaint/Student Grievance;
Late Withdrawal;
Medical Withdrawal;
General Absence;
Medical Absence;
Housing concern;
Family Emergency;
Email Scam;
Bookstore concern;
CC Referral;
CARE Team;
International Affairs;
Study Away(Abroad);
Admissions Referral;
Financial Aid;
Bursar;
Trio/EOP;
Civility Policy;
0% Withdrawal;
20% Withdrawal;
40% Withdrawal;
60% Withdrawal;
100% Withdrawal;

CONFIGURATION-CASE TYPES

- Student Assistance
- Emergency Fund
- ODOS Case File
- Student Assistance
- Student Grievance
- Title IX (Pregnancy or Non-campus incident support)

GOALS



Understand who are the students my office serves.
What is the demographic make up of the students we serve?



Streamline the services that students come to our office to receive.

DEEPER DIVE PROCESS



Reach out to our Office of Institutional Research about data project.



Pull 5 years of Student Assistance Data from Maxient

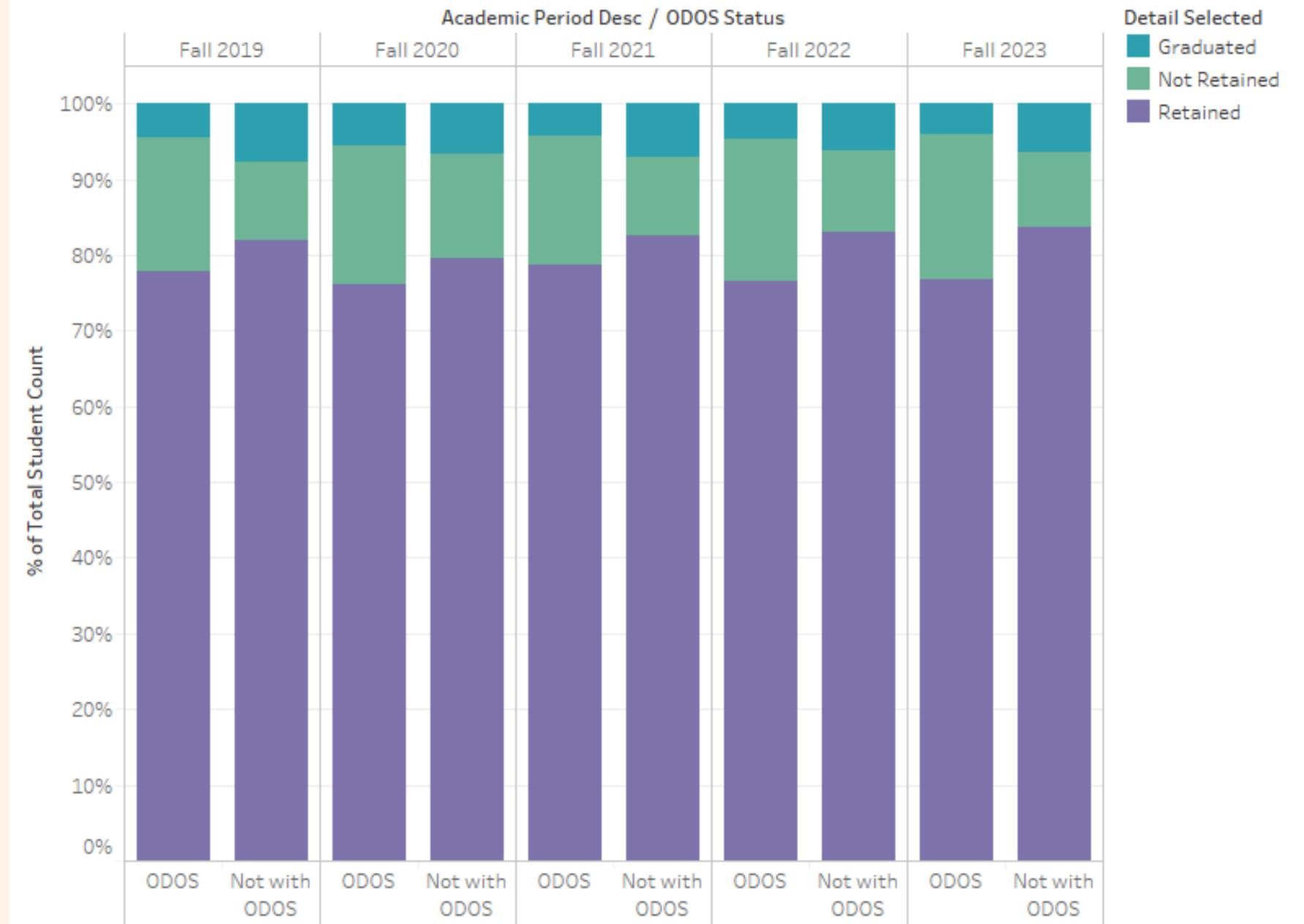
Establish what you're wanting to look for:

- Demographics for students served
 - Ethnicity
 - Age
 - Year
- Pell Grant Eligible
- Majors
- Withdrawals
- Retention
- Repeat users
- Special Groups
 - Trio, Vets, Athletics, Honors, Housing, International

DATA

Tableau

PNW Comparison of ODOS by One Semester Retention (UG Core Census Enrollment)

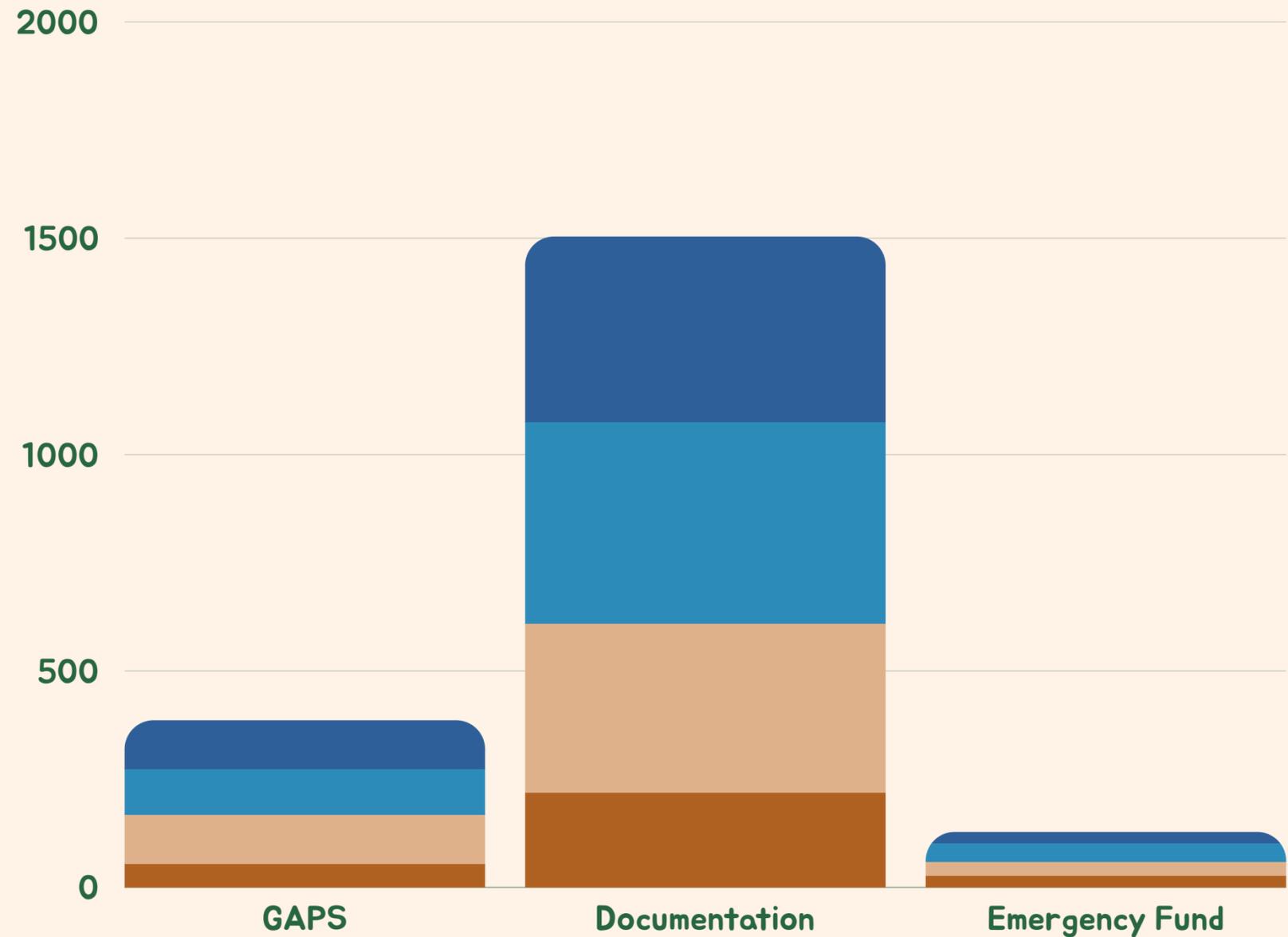


PNW Comparison of ODOS by Race / Ethnicity (UG Core Census Enrollment)

		Academic Period Desc											
ODOS Status	Detail Selected	Fall 2019		Spring 2020		Fall 2020		Spring 2021		Fall 2021		Spring 2022	
		Headcount	%	Headcount	%	Headcount	%	Headcount	%	Headcount	%	Headcount	%
ODOS	2 or more races	26	3.8%	37	4.5%	37	3.4%	14	2.1%	42	4.1%	42	4.6%
	American Indian or Alaska Native	3	0.4%	4	0.5%	4	0.4%	2	0.3%	1	0.1%	4	0.4%
	Asian	18	2.6%	17	2.1%	19	1.7%	13	2.0%	22	2.2%	26	2.8%
	Black or African American	126	18.3%	140	17.2%	126	11.5%	107	16.3%	147	14.5%	133	14.5%
	Hispanic/Latino	129	18.8%	169	20.7%	241	21.9%	153	23.3%	234	23.0%	198	21.6%
	International	22	3.2%	30	3.7%	22	2.0%	14	2.1%	20	2.0%	24	2.6%
	Native Hawaiian or Other Pacific Islander					1	0.1%			1	0.1%	4	0.4%
	Unknown	15	2.2%	10	1.2%	21	1.9%	5	0.8%	8	0.8%	7	0.8%
	White	348	50.7%	409	50.1%	627	57.1%	350	53.2%	542	53.3%	477	52.1%
Not with ODOS	2 or more races	172	2.8%	152	2.9%	145	2.8%	131	2.7%	123	2.7%	117	2.8%
	American Indian or Alaska Native	10	0.2%	8	0.2%	10	0.2%	11	0.2%	9	0.2%	6	0.1%
	Asian	139	2.3%	123	2.3%	125	2.4%	113	2.4%	117	2.5%	103	2.5%
	Black or African American	559	9.1%	488	9.2%	551	10.5%	460	9.6%	451	9.7%	399	9.6%
	Hispanic/Latino	1,363	22.3%	1,307	22.7%	1,376	24.3%	1,163	24.3%	1,149	24.8%	1,040	24.4%

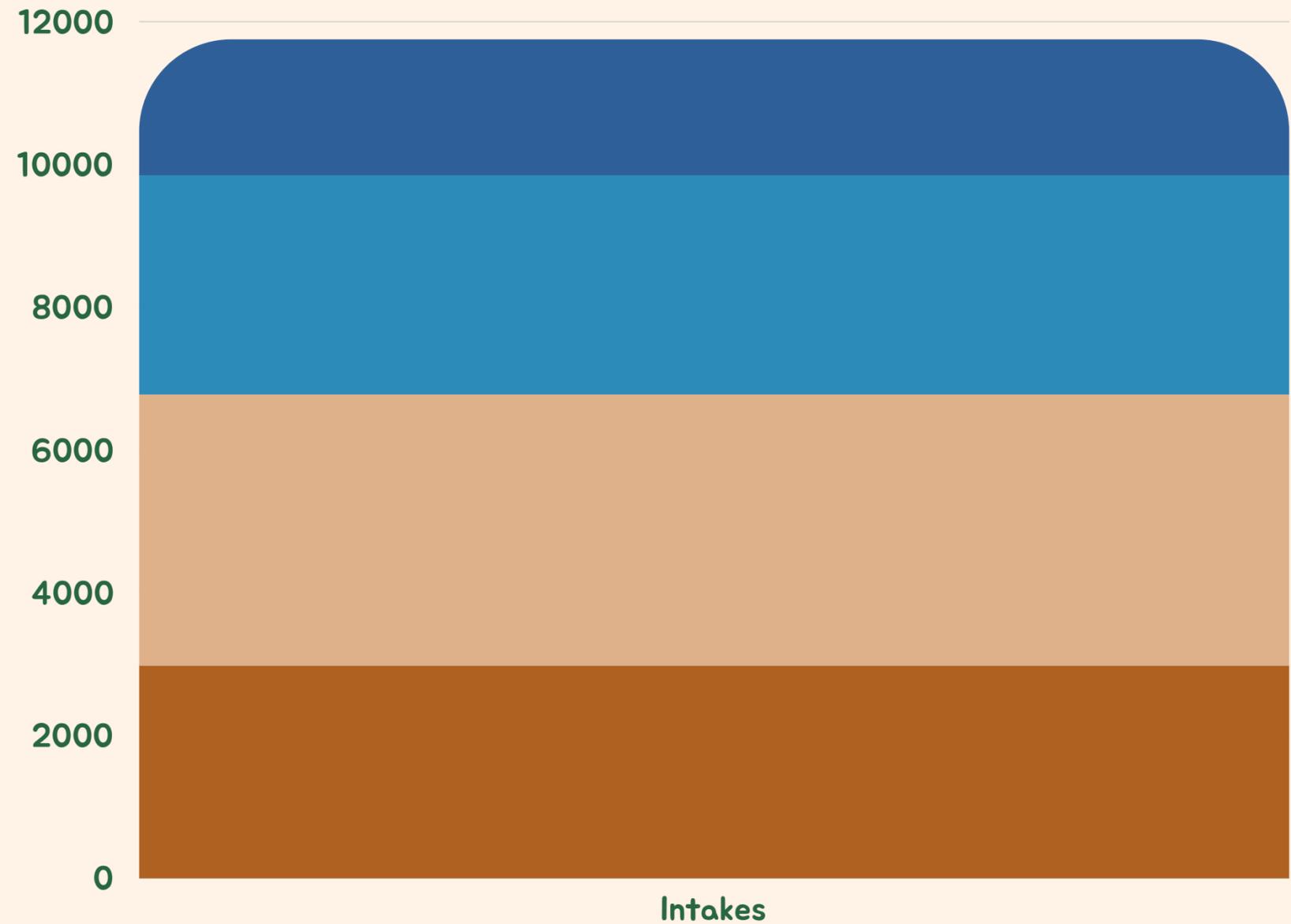
IMPACTS ON STUDENT SUCCESS

Bringing it back to some of the IRs that we added as a part of our Student Assistance digitization.



IMPACTS ON STUDENT SUCCESS

Bringing it back to some of the IRs that we added as a part of our Student Assistance digitization.





ANY QUESTIONS?

This is your time to ask any burning questions about the transformation journey or get advice on your transition to using Maxient in your Student Support/Advocacy roles.



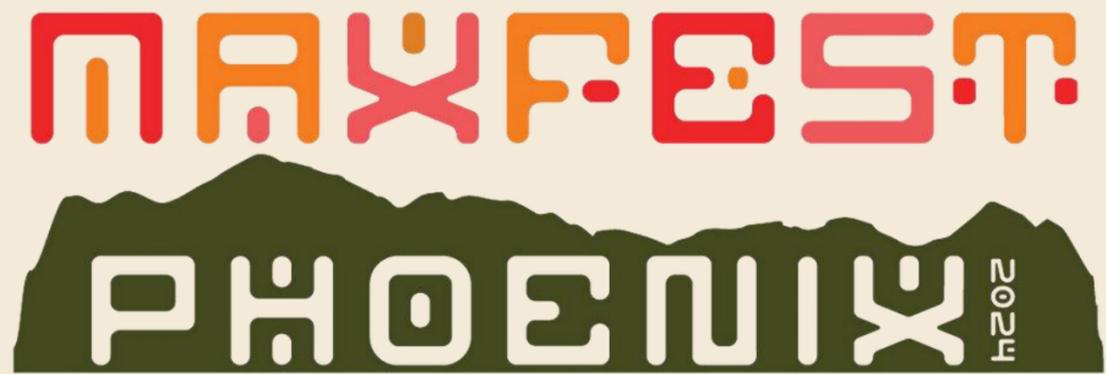
THANK YOU

Contact info

 blrhudson@pnw.edu

 219.989.4141





For Your Eyes Only

Level 5 Userhood



Jason Andrews

Senior Client Support Specialist

why are we here...

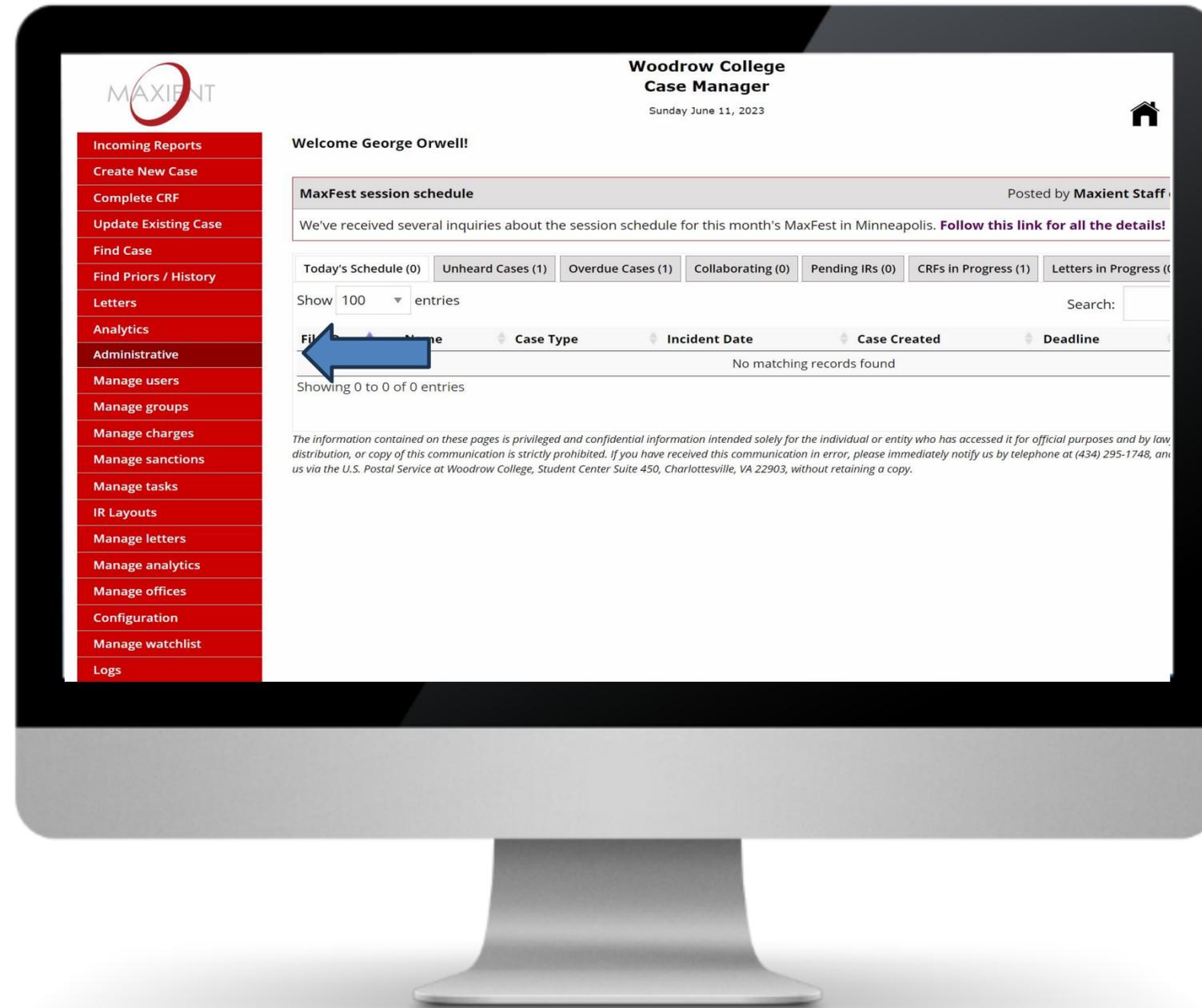
We are here to learn about the different capacities and responsibilities you have as a Level 5 User, the resources available to you to aid you in your role, as well as to discuss how to effectively and efficiently train new users.



Level 5 System Admin Screens



Admin Menu



Manage Users



Add New User Accounts

Create an account from scratch, or replicate an existing account to “clone” permissions and settings



Edit Existing Accounts

Contact information, user permissions, independent assignables, SightLines



Delete User Accounts

Will not harm your data to delete user accounts, it simply removes the account from the system moving forward

<https://support.maxient.com/hc/en-us/sections/206585567-Manage-Users>

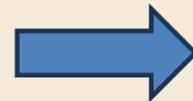
Manage Users

Manage Users > Overview



+ Add User

EDIT	USERNAME ▲	FULL NAME	OFFICIAL TITLE	HEARING OFFICER TITLE	PRIMARY OFFICE	EMAIL	PHONE	LAST LOGIN	ACCESS LEVEL
Edit	accountability	Dale Carnegie	Senior Associate Dean of Students	Sr. Assoc. DOS	Office of Student Conduct2	mferrara@maxient.com	555-555-5555	2022-06-28 15:53:18	5
Edit	afowler	Amy Farrah Fowler	Residence Hall Director, Capstone House	RHD - Capstone House	Housing and Residence Life	afowler@maxient.com		2023-06-11 15:53:22	5
Edit	austen	Jane Austen	Dean of Students, Community Engagement		Office of Student Conduct2	lkivell@maxient.com		2022-09-25 12:26:21	5
Edit	board	Campus Judicial Board	Campus Judicial Board	Campus Judicial Board	Office of Student Conduct2	board@maxient.com	555-1212	2018-02-08 15:23:25	3
Edit	ccomfort	Cathy Comfort	Director of Counseling		CARE Team	ccomfort@maxient.com		2022-06-22 13:48:35	4
Edit	csforester	C.S. Forester	Assistant Director of Judicial Affairs	Asst. Dir. - Judicial Aff	Office of Student Conduct2	lwatson@maxient.com		2023-03-23 11:07:56	5





Time for a test drive...



Manage Groups

Manage Groups > Overview

+ Add Group

EDIT	GROUP ID	NAME	DESCRIPTION	NUMBER OF MEMBERS	NUMBER OF CASES
Edit	5	Academic Integrity	Academic Integrity case managers.	21	17
Edit	28	BIRT	Cases involving reports of bias on campus	20	5
Edit	2	BIT	Multidisciplinary group that helps to ensure the well-being of the campus community	22	6
Edit	26	Community Health Cases	Cases involving community health crises	24	5
Edit	29	Disability Services	Cases being managed by Disability Services	6	11



locking down cases: access restrictions

Setup through the Manage Groups screen, Access Restriction Groups allow you to define who (Members/Users) can see cases which have been access restricted to a particular Access Restriction Group. If you aren't a Member of a Group, you don't see the cases the Group is assigned to.

<https://support.maxient.com/hc/en-us/sections/4421934967949-Manage-Groups>

Manage Charges



Add new Charges/Issues to your Maxient platform

- Once added, they are “live” and available for your use immediately.



Edit the existing Charges/Issues in Maxient

- Charge/Issue Title, Expanded Language, Published status...



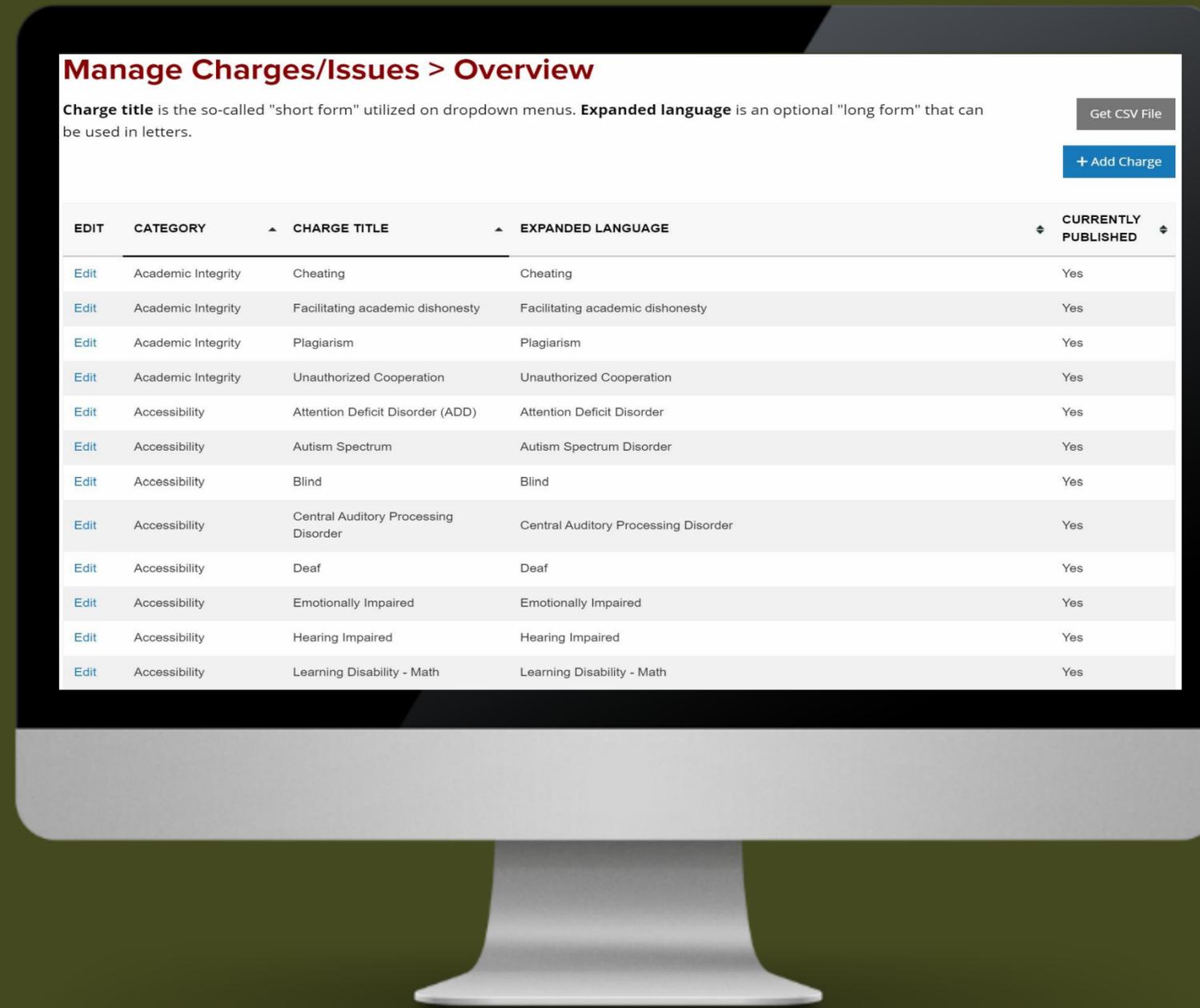
Delete sun-setted Charges/Issues in Maxient

- Will not harm your data -- simply removes the Charge/Issue as an option along with its expanded language.



<https://support.maxient.com/hc/en-us/sections/4419303029133-Manage-Charges>

Manage Charges



Manage Sanctions



Edit Existing Sanctions

Modify the sanction name, the language which appears in letters or on the Case Resolution Form, as well as sanction alerts, sanction reminders, or multiple ordering properties and options



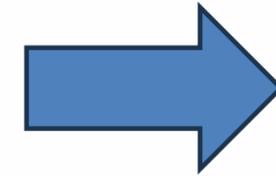
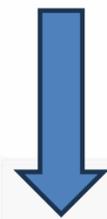
Request a New Sanction

Complete our convenient sanction request form and we will build your new sanction for you. On the Request Sanction screen there is a “tour” option for those new to this process

<https://support.maxient.com/hc/en-us/sections/206575868-Manage-Sanctions>

Manage Sanctions

Manage Sanctions/Actions > Overview



[+ Request Sanction](#)

EDIT	SECTION	DESCRIPTIVE NAME	SANCTION	POSITION IN SECTION	ORDER FOR LETTERS	CURRENTLY PUBLISHED	AUTO-MARK COMPLETED	REMINDERS PERMITTED
Edit	Academic	F in Course	FCOURSE	0	0	Yes	No	No
Edit	Academic	F on Assignment	FASSIGN	0	0	Yes	No	No
Edit	Academic	Grade Reduction	GRADEREDUCE	0	0	Yes	No	No
Edit	Academic	Academic Integrity Workshop	AIWKSHPP	1	1	Yes	No	Yes
Edit	Academic	Reduce Assignment Grade	REDUCEAG	2	1	Yes	No	No
Edit	Accommodations	Assignment Deadlines	ACCM_ASSGNMT	0	0	Yes	No	Yes
Edit	Accommodations	Assignment Delay + 7	ACCM_DELAYASSGN	0	0	Yes	No	Yes
Edit	Accommodations	Audio Books	ACCM_AUDIOBK	0	0	Yes	No	Yes
Edit	Accommodations	Classroom Location Move	ACCM_CLSMV	0	0	Yes	No	Yes
Edit	Accommodations	Closed Caption	ACCM_CC	0	0	Yes	No	Yes



Time for a test drive...



Task Templates

The “Checklist” of To-Do Items:

Via the Manage Tasks screen and the “Edit Task Templates” button, Task Templates allow you to create a series of Tasks (or just one) to be added to a file or case each time the Template is selected. These Templates provide consistency and continuity across your workflows while also allowing you to hold individuals accountable for their responsibilities.

<https://support.maxient.com/hc/en-us/articles/115000282592-Tasks>

Manage Tasks

You can see and sort all tasks assigned to you. Level 5 users have the option to see all tasks that are not part of a case from which they are restricted. Only the creator or user to whom a task is assigned may delete a task. Anyone can mark a task as complete. All actions taken on tasks are recorded in the audit trail.

Edit Task Templates

Show tasks for:

me only all users

Show tasks with this status:

Incomplete tasks
 Completed tasks between

Start date

2023-05-28

End date

2023-06-11

Refresh

Task Template Management

Task templates can help add consistency to your workflow. Set them up for any process. You may only edit and delete templates that you own, but you can copy any template shared with you and modify it to your own needs. Link back to Manage Tasks

Create a new template

Show 10 entries

Search:

Edit	Duplicate	ID	Template Name	Template Access	Owner	Delete
	Duplicate	43	Academic Support	Shared	Toni Morrison	
	Duplicate	52	Title IX Process for Complainant	Shared	Toni Morrison	
	Duplicate	53	Title IX Process for Respondent	Shared	Toni Morrison	
	Duplicate	55	Academic Integrity	Shared	Gertrude Stein	
	Duplicate	63	Appeals Process	Shared	Norton Juster	
Edit	Duplicate	66	Appeals Process	Shared	George Orwell	<input type="checkbox"/>

Showing 1 to 6 of 6 entries

Previous 1 Next

Delete selected templates

Manage Offices/Teams

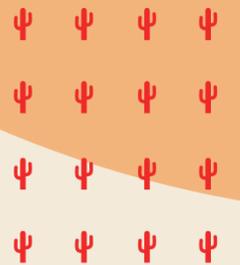
EDIT	OFFICE NAME
Edit	Academic Affairs
Edit	Behavioral Intervention Team
Edit	Bias Incident Response Team
Edit	Early Alert
Edit	Housing and Residence Life
Edit	Human Resources
Edit	Office of Disability Services
Edit	Office of Student Conduct2
Edit	Office of the Dean of Students
Edit	Sexual Violence Prevention and Education

Manage Offices

Correspondence Communication

The primary controlling location of the email and text message language sent to a receiving party (or a CC) when a letter is sent electronically through the system.

<https://support.maxient.com/hc/en-us/sections/4419309675021-Manage-Offices>





Logs



The screenshot displays the MAXIENT Case Manager interface for Woodrow College. The top header includes the MAXIENT logo, the user name "George Orwell", and the access level "5". The date "Sunday June 11, 2023" is also visible. A navigation sidebar on the left lists various system functions, with "Logs" highlighted at the bottom. A dropdown menu is open for the "Logs" option, listing "Audit Trail by File ID", "Audit Trail for Entire Case", "Timeline", "Data Feeds", "Backups", "System Log", and "User Activity". A blue arrow points to the "Logs" menu item. A disclaimer is visible in the background of the interface.

Logs

Audit Trails

01

Allows you to see the “running record” of anything which has happened in a file (individual) or a case (situation).

TimeLine

02

A pictorial timeline of the important events occurring during the lifespan of a file or a case.

System Log

03

The macro level view of who is logging in/out of our Maxient system, editing IR Layouts, or deleting files, cases, or users.

User Activity Report

04

The “Audit Trail” of a user’s engagement in Maxient, from files they’ve viewed to changes they’ve made in the system.

Configuration Screen

- The “brains” behind the operation, this screen allows you to set many of the selectable options in the various drop-down menus you and your users will encounter throughout the Maxient system
- There is guidance text to the left of each field identifying what the purpose of the field is as well as any special formatting requirements.
- Has its own support article dedicated to it:

<https://support.maxient.com/hc/en-us/articles/360042442972-The-Configuration-Screen-Making-Maxient-Work-for-You->

System Admin Resources

We are here to learn about the different capacities and responsibilities you have as a Level 5 User, the resources available to you to aid you in your role, as well as to discuss how to effectively and efficiently train new users.

System Admin Resources



Maxient Administrator Responsibilities

<https://support.maxient.com/hc/en-us/categories/4419309436557-Maxient-Administrator-Responsibilities>



90 Minutes Max(ient): Administrative Screens

<https://support.maxient.com/hc/en-us/articles/360050481051-90-Minutes-Max-ient-Administrative-Screens>



I'm a Level 5 User... What Should I Know?

<https://support.maxient.com/hc/en-us/articles/230310388-I-m-a-Level-5-User-What-Should-I-Know->

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Training New Users



Training New Users

As one of the Level 5 Users you are likely to be tasked in some capacity with training new users. There are a handful of resources available in the support system to assist you with this.



Bootcamp

3 hour recorded “virtual” training for new users



I’m a New User..

Synopsis of important system aspects



Table Tops

Pre-composed scenarios to help you train with your team



Maxient Led

For a cost we come out and retrain. Email us for info and price

New Users Resources



Bootcamp @ Home Training

<https://support.maxient.com/hc/en-us/articles/360055911532-New-User-Training-Bootcamp-Home-Videos>



I'm a New User... What Should I Know?

<https://support.maxient.com/hc/en-us/articles/230310128-I-m-a-New-User-What-Should-I-Know->



Table-Top Exercises (as part of a Specific Workflow)

<https://support.maxient.com/hc/en-us/categories/4419257955981-Specific-Process-Workflows>

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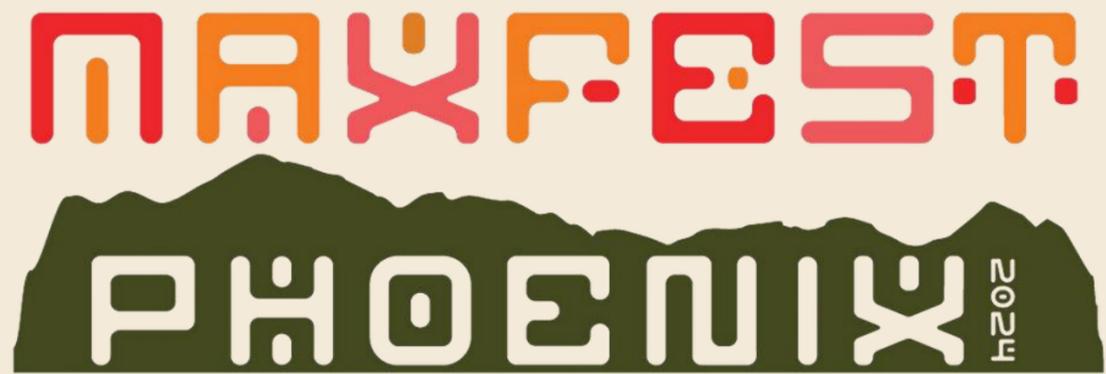


Questions?



Thank You!





Home Office and Sending Letters

Did you know they were related?



Ivy Fry

Client Support

Specialist

Support Questions for Home Office and Sending Letters:

- **Why does it say my office is sending the letter instead of me?**
- **Why does it look like my letter came from an office other than mine?**
- **Why does my letter say it came from the hearing officer, but it's assigned to me?**
- **Students aren't opening the letters...What settings do I need to adjust to make them more friendly?**

Answers can be found in:

- Letter Draft Screen
- Reviewing Manage Offices Settings
- Reviewing Manage Users Settings
- Configuration Screen Settings



When emailing letters, ask yourself...



Should emails sent to individuals appear to be sent by the **author's** institutional email address **or** the email address associated with the **office** to which a file is assigned?



We'll review how to edit **Manage Offices** and **Manage Users** settings accordingly

Reminders about Emailed Letters

-  Letters can be sent to recipients and CCs by a Maxient email
-  Users can customize what the subject of that email says or use the default
-  Users can choose if correspondence appears to be coming from themselves, or the home office the case is assigned to
-  Users can choose if these are sent via Verified Delivery



Letter Draft Screen

Step 1 – Choose the destination



Letters can be sent to recipients by a Maxient email

Letter Draft Screen

1 Edit your draft 2 Select copy recipients 3 Add forms and attachments 4 Preview, send, or save

Choose your destination:

After sending the letter, you'll have a copy of the letter in your draft. Content will be lost.

Font Family Font Sizes **A** **A** **B** *I* U " " <> *I*_x

June 6, 2024

Andrew (Andy or Nard Dog) Bernard
Sent electronically to andy.bernard@maxient.com

PERSONAL AND CONFIDENTIAL

Regarding Case Number: 2021001803

Dear Mr. Bernard,

Information has been sent to this office that would indicate that your presence in our residence halls, academic buildings, and other campus property would be disruptive to the University community and/or could be a danger to our students, faculty, or staff. As such, this letter is to serve as an official notice that you are hereby restricted from University property without express written permission from the Dean of Students Office or the Office of Campus Safety.

Please be aware that should you choose to be on campus property without permission it will constitute criminal trespass and you may be arrested.

Should you wish to discuss this matter please contact our office at (434) 555-1212, Monday through Friday, 8:30 am to 5:00 pm and schedule an appointment.

Sincerely,



Letter Draft Screen

Step 2 – Add CCs



CC recipients typically receive an emailed message that is different from the primary recipient



Letter Draft Screen

1 Edit your draft

2 Select copy recipients

3 Add forms and attachments

4 Preview, send, or save

These people will receive a copy of the letter as an email attachment.

Select a CC recipient ...

C.S. Forester, Assistant Director of Judicial Affairs

Dean Athena, Director of Greek Life

Dr. Phil McGraw, Director of Counseling Center

Dr. Seuss, Dean of Students

Michael Jordan, Director of Athletics

Mr. T, Director of Security

CCs will appear here.

Drag to reorder as desired for the final product.

Jean-Paul Sartre
ginsbur@maxient.com

BCCs will appear here.

...eans. Any dissemination, distribution, or copy of this communication is strictly prohibited. If you have received this communication in error, please immediately notify us by telephone at (434) 295-1748, and return the original message to us via the U.S. Postal Service at Woodrow College, Student Center Suite 450, Charlottesville, VA 22903, without retaining a copy.

Letter Draft Screen

Step 4 – Preview, send, or save

Review the Options and Email content ribbons

Letter Draft Screen

1 Edit your draft 2 Select copy recipients 3 Add forms and attachments 4 Preview, send, or save

Letters.php 1 / 1 90%

Woodrow College

June 6, 2024

Andrew (Andy or Nard Dog) Bernard
Sent electronically to andy.bernard@maxient.com

Regarding Case Number: 2021001803

Dear Mr. Bernard,

Information has been sent to this office that would indicate that academic buildings, and other campus property would be disrupted, which could be a danger to our students, faculty, or staff. As such, this information is being sent to you so that you are hereby restricted from University property without express written permission from the Dean of the Students Office or the Office of Campus Safety.

Preview opening in a different window

Options Email content Letterhead/Margins

Use Verified Delivery [What's this?](#)

Letter Draft Screen

1 Edit your draft 2 Select copy recipients 3 Add forms and attachments 4 Preview, send, or save

Letters.php 1 / 1 81%

Woodrow College

June 6, 2024

Andrew (Andy or Nard Dog) Bernard
Sent electronically to andy.bernard@maxient.com

PERSONAL AND CONFIDENTIAL

Regarding Case Number: 2021001803

Dear Mr. Bernard,

Information has been sent to this office that would indicate that your presence in our residence halls, academic buildings, and other campus property would be disruptive to the University community and/or could be a danger to our students, faculty, or staff. As such, this letter is to serve as an official notice that you are hereby restricted from University property without express written permission from the Dean of the Students Office or the Office of Campus Safety.

Preview opening in a different window? [Let us help you fix that.](#)

Options Email content Letterhead/Margins

From:
Leslie Knope <lexkb2024@gmail.com> (Signer)

Subject:
Correspondence for Conduct Case 2021001803 (Andrew Bernard)

Letter Draft Screen

Step 4 – Preview, send, or save: Options

The screenshot displays a web interface for drafting a letter. At the top, it shows the date "Wednesday June 5, 2024" and navigation icons (home, user, notifications, help). The main preview area shows a letter header from the "DIVISION OF STUDENT AFFAIRS" dated "June 5, 2024", addressed to "Angela Martin" at "sekoukal@maxient.com". The subject is "Regarding Case Number: 2020000903" and "987654009". The salutation is "Dear **Angela**". A large red watermark "DRAFT" is overlaid on the preview. Below the preview is a link: "Preview opening in a different window? [Let us help you fix that.](#)".

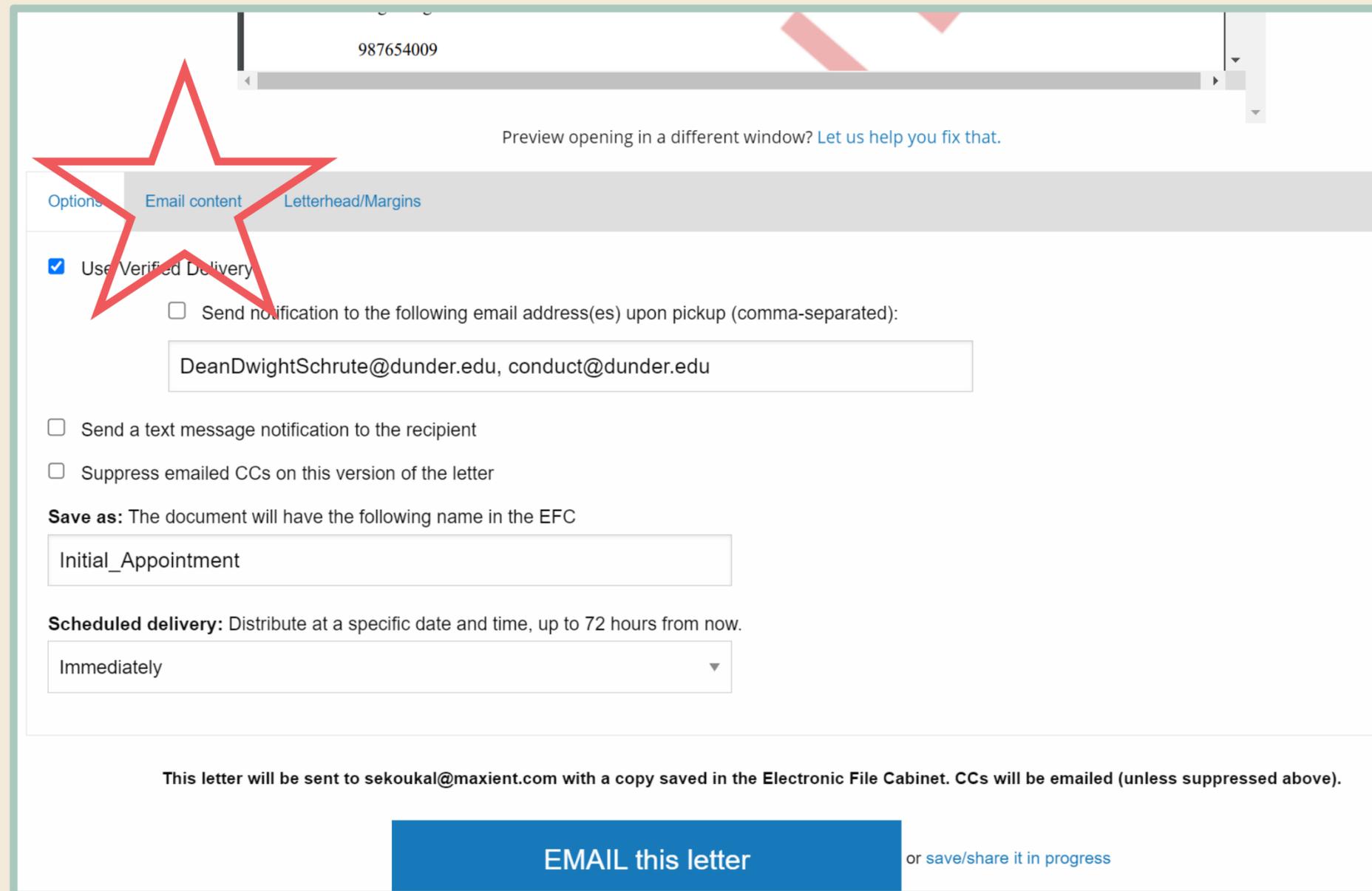
The "Options" tab is active, showing the following settings:

- Use Verified Delivery
 - Send notification to the following email address(es) upon pickup (comma-separated):
- Send a text message notification to the recipient
- Suppress emailed CCs on this version of the letter

- If you leave Verified Delivery **checked**, letter delivery works as it always has
- If you **uncheck** Verified Delivery, your letter will be sent in the body of the email

Letter Draft Screen

Step 4 – Preview, send, or save: Email content



987654009

Preview opening in a different window? [Let us help you fix that.](#)

Options | **Email content** | Letterhead/Margins

Use Verified Delivery

Send notification to the following email address(es) upon pickup (comma-separated):

DeanDwightSchrute@dunder.edu, conduct@dunder.edu

Send a text message notification to the recipient

Suppress emailed CCs on this version of the letter

Save as: The document will have the following name in the EFC

Initial_Appointment

Scheduled delivery: Distribute at a specific date and time, up to 72 hours from now.

Immediately

This letter will be sent to sekoukal@maxient.com with a copy saved in the **Electronic File Cabinet**. CCs will be emailed (unless suppressed above).

EMAIL this letter or [save/share it in progress](#)

**Review the
Email
content
before
sending!**

Letter Draft Screen

Step 4 – Preview, send, or save: Email content

Options | Email content | Letterhead/Margins

From:
Human Resources <hr@maxient.com> (Case home office)

Subject:
Communication from Woodrow College's Human Resources

Body (recipient) - used for Verified Delivery only:

THIS IS AN OFFICIAL CORRESPONDENCE FROM THE HUMAN RESOURCES AT WOODROW COLLEGE

A letter has been issued to you electronically by our office. Upon clicking the link below, you will be taken to a screen displaying your name and requesting an access code to ensure screen, and then enter your ID number as the access code.

Your letter will appear in PDF format and should be printed or saved for your records. If the letter fails to appear, you may need to use a different computer or install the free Adobe Acrobat Reader to access your letter or wish to confirm the legitimacy of this message, please contact our office at (434) 295-1748.

Body (CCs):

SENDER'S EMAIL SIGNATURE BLOCK WILL APPEAR HERE

Preview opening in a different window? [Let us help you fix that.](#)

Options | Email content | Letterhead/Margins

From:
Human Resources <hr@maxient.com> (Case home office)
Jane Austen <lkivell@maxient.com> (Signer)
Maxient Staff Account <info@maxient.com> (Current user)
Human Resources <hr@maxient.com> (Case home office)
Communication from Woodrow College's Human Resources

Body (recipient) - used for Verified Delivery only:

- The body messages can be edited in the Manage Offices or Configuration settings
- The case home office and your primary office are not always the same
- If you are not using Verified Delivery, then your letter is what is in the email body

Manage Offices Settings

Where you determine Office contact information and...

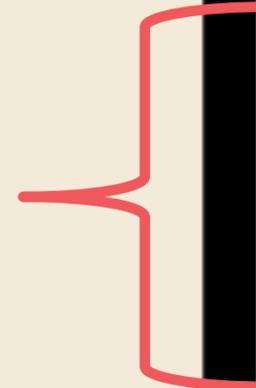


- Subject Line For Emails To Case Parties
- Body Text For Emails To Case Parties
- Text Message Content To Case Parties
- Body Text Of Email To CC Recipients
- Body Text Of Email To Memo Recipients
- Body Text For CRF Remote Execution Requests To Case Parties
- Text Message Content For CRF Remote Execution Requests To Case Parties

Manage Offices Settings



Let's
edit
these!



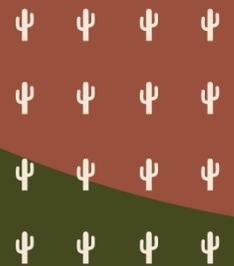
Manage Offices/Teams > Edit

OFFICE/TEAM NAME <small>Must be unique.</small>	Behavior Team
PHYSICAL ADDRESS	
MAILING ADDRESS	
PHONE NUMBER	
EMAIL ADDRESS	sekoukal@maxient.com
EMAIL SIGNATURE	
SUBJECT LINE FOR EMAILS TO CASE PARTIES <small>If no subject line is provided for this office, the default found on the Configuration screen will be used. No HTML permitted.</small>	sekoukal@maxient.com
BODY TEXT FOR EMAILS TO CASE PARTIES <small>This text will form the content of the email, and will be followed by a link to access the PDF letter from Maxient's secured servers. If no body text is provided for this office, the default found on the Configuration screen will be used.</small>	THIS IS AN OFFICIAL CORRESPONDENCE FROM THE BEHAVIOR TEAM AT DEMO UNIVERSITY {{{FIRST_NAME}} {{LAST_NAME}}: A letter has been issued to you electronically by our office. Upon clicking the link below, you will be taken to a screen displaying your

Manage Offices Settings

Reminders

- The content should be for the office and not an individual
- Tone of the subject and body message should be customized to the office
- Incorporate merge fields
- If this is not specified for each office, it will default to the language that is set on the Configuration screen



Let's take a look!

Manage Offices Settings



EMAIL ADDRESS

studentsuccess@maxient.com



EMAIL SIGNATURE

Woodrow College
Student Success and Retention
Office of the Provost
Charlottesville, VA 22903
(202) 456-1111
studentsuccess@maxient.com



SUBJECT LINE FOR EMAILS TO CASE PARTIES

If no subject line is provided for this office, the default found on the Configuration screen will be used. **No HTML permitted.**

{{FIRST_NAME}}, We're here to help {{FIRST_NAME}} {{LAST_NAME}}



BODY TEXT FOR EMAILS TO CASE PARTIES

This text will form the content of the email, and will be followed by a link to access the PDF letter from Maxient's secured servers. If no body text is provided for this office, the default found on the Configuration screen will be used.

THIS IS AN OFFICIAL CORRESPONDENCE FROM THE CENTER FOR STUDENT SUCCESS AT WOODROW COLLEGE
At Woodrow College, we are committed to your success and to supporting you when you have academic struggles.

Manage Users Settings

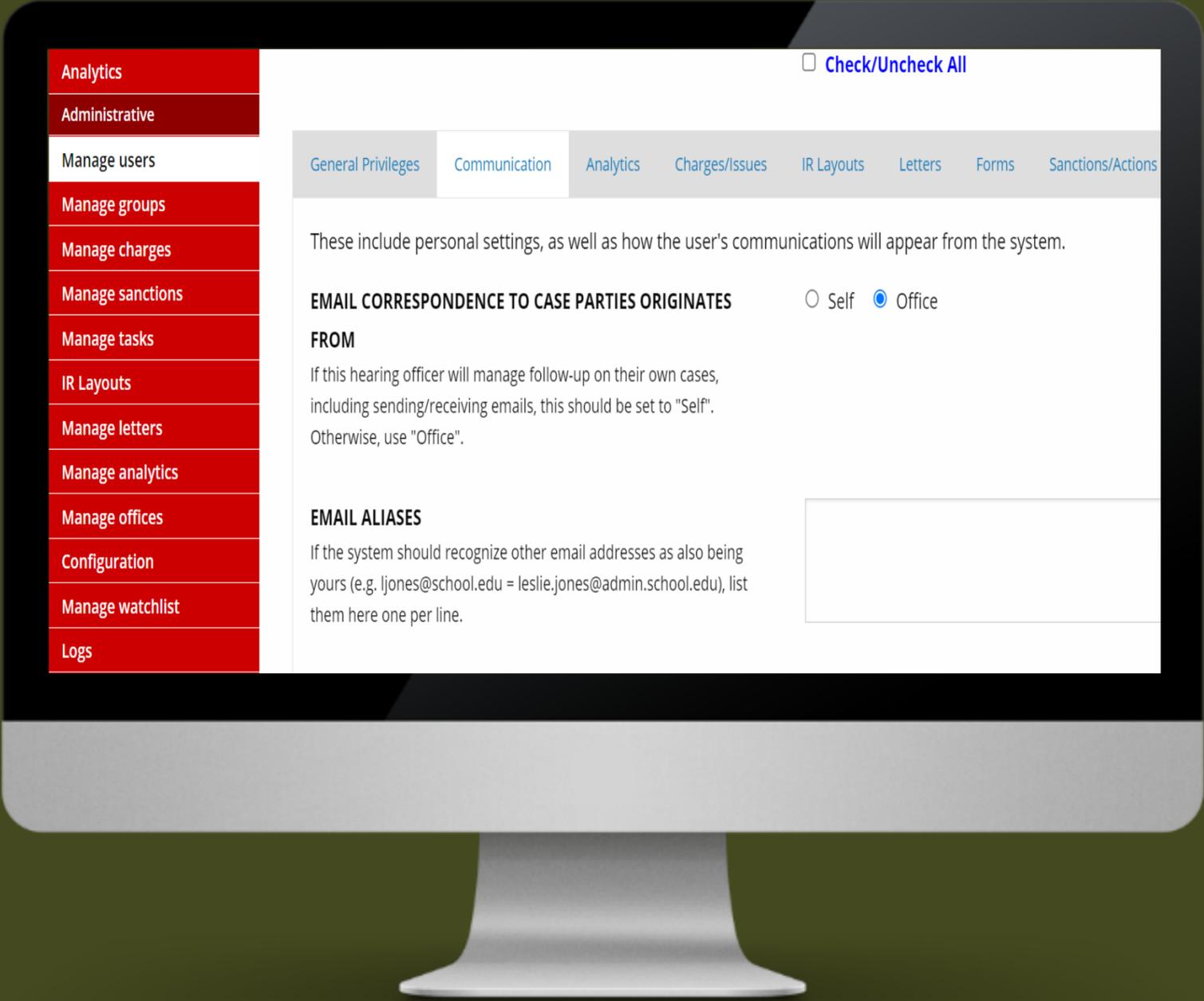
- Where your personal communication settings are found
- You can choose if emailed correspondence appears to come from you, or your Primary Office.
- If you aren't sure what is set as your Primary Office, you can find out on this screen!



Manage Users Settings



If you typically have someone sending and responding to your initial correspondence, you might choose to toggle this to 'Office,' or vice versa!



Last but not least...

Configuration Settings



Configuration Settings



DEFAULT EMAIL BODY MESSAGE

The body text for emailed letters is chosen preferentially from the settings of the HOME_OFFICE assigned to manage the case. Absent that, this will appear as the plaintext body of emails to students.

THIS IS AN OFFICIAL CORRESPONDENCE FROM THE DEAN OF STUDENTS OFFICE AT WOODROW COLLEGE

A letter has been issued to you electronically by our office. Upon clicking the link below, you will be taken to a screen displaying your name and requesting an access code to ensure confidentiality. Confirm that your name appears on the screen, and then enter your student ID number as the access code. If you are receiving this notice in your capacity as a leader of a campus organization, you should contact our office immediately to request the appropriate access code for your organization.



DEFAULT EMAIL SUBJECT LINE FOR LETTERS

The subject line for emailed letters is chosen preferentially from the settings of the HOME_OFFICE assigned to manage the case. Absent that, this will appear as the subject line of emails to students (followed by the File ID number).

Correspondence for Conduct Case



DEFAULT METHOD FOR NOTES

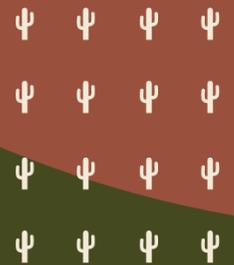
This will be the default method that appears when adding notes to a case.

General Notes Individual Notes

EMAIL SENDER SETTING

Maxient can auto-determine the appropriate From: address for emails sent to the student, based on whether or not the case has been heard. Or, you may specify it should always be the person to whom the case is currently assigned.

Assigned To Auto-determine



Configuration Settings



Default Email Body Message
Default Email Subject Line For Letters



Is it **general** enough?



Is the contact information **correct**?

Assigned To



- The system pulls the Email Sender from who the case is Assigned To on the case Assignment tab

Auto-determine



- The system pulls first from the 'Administrator 1' on the case resolution
- If the case is unresolved, it pulls from Assigned To

Configuration Settings

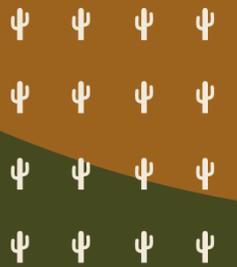


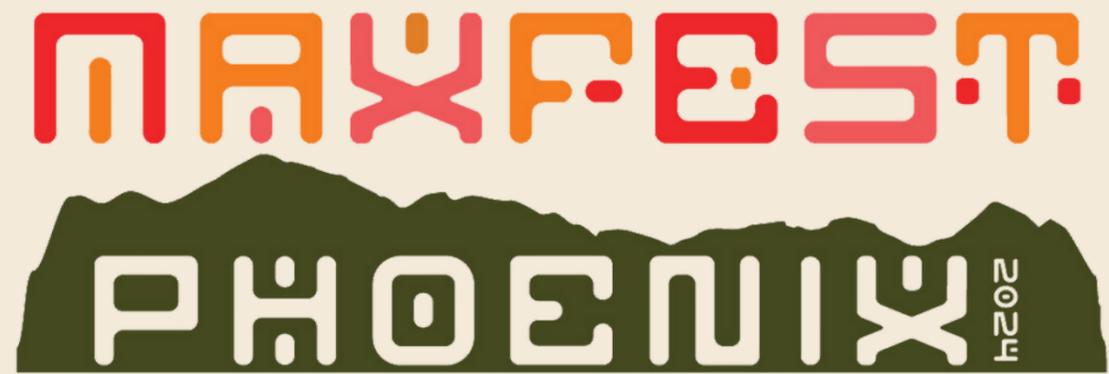


Questions?

Thank You!

Contact us with any questions at support@maxient.com





If You Build It, They Will Come

How to Build IR Layouts



Lex Kelch-Brickner
Client Success Advisor

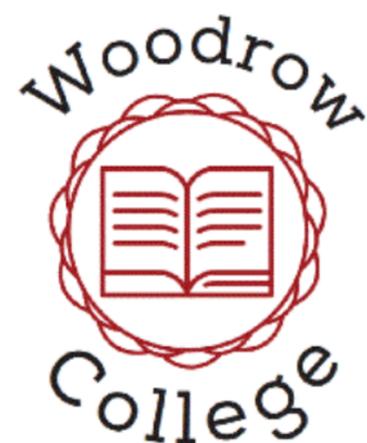
Agenda / Objectives

- What is an IR Layout?
- 7 Steps of Building an IR Layout
- Related features (watchlists, e.g.)
- Communication Importance and Considerations



WHAT IS AN IR LAYOUT





Sexual Misconduct and Interpersonal Violence Reporting Form

IF YOU NEED TO REPORT AN EMERGENCY, DO NOT USE THIS FORM. INSTEAD CALL THE WOODROW COLLEGE POLICE AT 434-555-1234 OR DIAL 911.

This form should be used to report concerns about or possible violations of Woodrow College's Sexual Misconduct Policy such as sexual misconduct, sexual harassment, or sexual intimidation. [Click here](#) to link to Woodrow College's Sexual Misconduct Policy.

Woodrow College respects the sensitivity of the information that may be included in this form and you may submit it anonymously. However, as mandated by Title IX as a federal law, the information included in this form is not confidential but great efforts are made to keep it as private as possible.

If you or someone you know are campus students and would like to speak to a confidential Woodrow College staff member for support or information related to issues of sexual violence, relationship violence, or stalking, please contact the Safe Office by calling 434-555-6578 (available 24/7), visiting the [Safe Office](#) website, or emailing Emily Dickinson, Coordinator of Sexual and Relationship Violence Prevention and Response, at edickinson@woodrow.edu.

If you wish to report a crime anonymously please utilize the Woodrow College Police's [Silent Witness form](#).



- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find People
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters

IR Layouts > Overview

Make reporting easier using Maxient's landing page feature. [Click here to learn more.](#)

EDIT	CATEGORY	TITLE
Edit		ATIXA: Harassment, Discrimination and Retaliation On-Line Complaint Form
Edit		ATIXA: Harassment, Discrimination, and Retaliation Hearing Appeal Form
Edit		BOOTCAMP TRAINING: Academic Misconduct Reporting Form
Edit		Clery Report (Maxient Example)
Edit		Complaint/Resolution Reporting Form
Edit		Concerning, Threatening, or Worrisome Behavior
Edit		COVID-19 Absence Notification
Edit		Incident Reporting Form

Overview

★ System update alert!



- New vs Edit
- Organization!
- Landing Page
- ★ Cloning
- ★ Categories
- ★ Blue Box has moved



7 STEPS



1



Edit Screen

- Title and instructions
- Publication
- Watchlist
- Landing Page

IR Layouts > Edit Layout ID #40

Quick Links:

[REPORTER'S INFO](#) / [NATURE / LOCATION / DATE](#) / [INVOLVED PARTIES](#) / [QUESTIONS](#) / [COPIES / AUTHENTICATION](#) / [ROUTING RULES](#)

TITLE

This is the name displayed on the form.

CATEGORY

This appears exclusively on the IR Layouts screen, and is used solely for the purpose of organization. Select from a category you've used previously, or a new one will be created from whatever is typed here.

HEADER INSTRUCTIONS

Basic HTML markup is permitted.

LOGO IMAGE

MUST be in GIF format.

Logo should not exceed 381x99 pixels.

URL

This form will be available at this URL.

QR CODE

This QR code can be used to direct people immediately to this IR layout. Right-click on the image and save it, then use anywhere you desire!

LAYOUT ACTIVE

If set to "No", this layout will no longer be accessible on its URL. Users will be automatically redirected to the URL you specify here, or to an error screen if no URL is specified. Be sure to include the "https://" prefix (or similar) for the address. This setting has no impact on reports already submitted through the layout.

PERMIT WATCHLIST NOTIFICATIONS

If for any reason the involved parties on this layout should not be considered for watchlist notifications, you may set this option to "No". Note: The SID is used to trigger these notifications, so it must be active for involved parties for this to work.

INCLUDE IN REPORTER LANDING PAGE

The reporter landing page is a collection of your institution's reporting forms. Your reporters can select the needed form and be directed to the appropriate page. Use the options here to indicate whether this form should be included, what appears in the selection area ("title") and how the form is described. HTML is not permitted.

The URL for your landing page is:

<https://cm.maxient.com/reporting.php?SaintAnselmCollege>

To customize it, [visit the Configuration page](#).

More information about this feature can be found here: <https://support.maxient.com/hc/en-us/articles/4406603483277-Reporter-Landing-Page>



There are several options for reporting different types of incidents to Woodrow College Departments. Please review the following options and select the one most appropriate for your needs.

Not sure if a behavior is a violation or how to categorize it? Contact the Office of Student Conduct at (555) 555-1234.

None of these reporting forms are 911 or Emergency Service:

Do not use any of these reports if presenting an immediate threat to life or property. Reports submitted through this service may not receive an immediate response. If you require emergency assistance, please contact Woodrow State Police at 111-111-1111 or dial 911.

Please select the appropriate reporting form:

Go

- I need to report a violation of the Code of Student Conduct.
- I need to report academic misconduct.
- I need to report an incident involving sexual misconduct.
- I need to report concerning conduct.
- I need to request an accommodation.
- I want to make a referral regarding a possible violation of Code of Conduct or report a medical incident.
- TRAINING IR



> IR Landing Page

More information about this feature can be found here: <https://support.maxient.com/hc/en-us/articles/4406603483277-Reporter-Landing-Page>

FSU | REPORT.FSU.EDU

Welcome to report.fsu.edu. This site allows you to share important information regarding incidents or concerning behavior happening in the Florida State University community. Please read each description by hovering over the button of the report you would like to submit.
Click again on mobile devices to submit.

If you believe that a situation you are reporting is an emergency and requires immediate attention, **please first call FSUPD at (850) 644-1234.**

Report Drink Spiking

Report Sexual Misconduct, Stalking and Domestic/Dating Violence

Report Concerning Behavior

Report ADA/Accessibility Issues

Report Hazing

Refer a Student for Academic Skills Assistance

Report Behavioral Issues in Canvas Courses

Conflict Resolution Self-Referral

Report Conduct Violations (Non-Academic)

Report On-Campus Housing Incident

Report Acts of Discrimination

Report Student Organization Violations (Non-Hazing)

Report a Posting Violation

Zoom Security Violation

Victim Advocate Program



> IR Landing Page

More information about this feature can be found here: <https://support.maxient.com/hc/en-us/articles/4406603483277-Reporter-Landing-Page>

FSU | REPORT.FSU.EDU

Welcome to report.fsu.edu. This site allows you to share important information regarding incidents or concerning behavior happening in the Florida State University community. Please read each description by hovering over the button of the report you would like to submit.
Click again on mobile devices to submit.

If you believe that a situation you are reporting is an emergency and requires immediate attention, **please first call FSUPD at (850) 644-1234.**

Report Conduct Violations (Non-Academic)

To report alleged violations of the Student Conduct Code and/or Student Organization Conduct Code, please use the online reporting form available here. Reports are submitted to the Office of Student Conduct & Community Standards for review. Non-academic violations include any behavior that is not related to an allegation of cheating or plagiarism (e.g. alcohol, drugs, harassment, vandalism, disorderly conduct, etc.). If you have questions about whether a behavior is considered a violation, please contact the Office of Student Conduct and Community Standards.

Report Sexual Misconduct, Stalking and Domestic/Dating Violence

Report Concerning Behavior

Report ADA/Accessibility Issues

Report Hazing

Refer a Student for Academic Skills Assistance

Report Behavioral Issues in Canvas Courses

Conflict Resolution Self-Referral

Report Conduct Violations (Non-Academic)

Report On-Campus Housing Incident

Report Acts of Discrimination

Report Student Organization Violations (Non-Hazing)

Report a Posting Violation

Zoom Security Violation

Victim Advocate Program



> IR Landing Page

Background Information

Designed to capture basic information about the incident and/or reporter.

BACKGROUND / REPORTER INFO

BACKGROUND INFORMATION SECTION HEADER

Reporter Information

BACKGROUND INFORMATION SECTION TEXT

Basic HTML markup is permitted.



<> *I*

p

REPORTER'S NAME FIELD

Visibility: Show Hide

Description:



2

The Routing Rule Trio



Nature



Urgency



Location

Governs who is a primary or copy recipient of a report.



Involved Parties

1. Do you need to collect involved parties?
2. If so, one or more than one?
3. What info do you need to collect?

INVOLVED PARTIES

INVOLVED PARTIES ENABLED

Yes No Limit one

"Yes" is the best choice here for all but the most customized forms. If set to "No", we will hide the entire Involved Parties section from your form, which will also prevent you from adding them when editing a submitted form. Choosing "Limit one" will prevent the "Add another person" button from being an option on your form.

INVOLVED PARTIES SECTION HEADER

Involved Parties

SCREENING QUESTIONS:

Please provide the listed fields. Be as complete as possible. It is important that we are able to contact the affected party for necessary follow-up. For non-students, please list a driver's license, another personally-identifying number, or 'ID Number.'

Name of student believed to be affected	Woodrow ID Number	Cell Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Hall/Address		
<input type="text"/>		

Add another party

4



5



Questions

In this section you can collect more detailed information.

QUESTIONS

QUESTIONS SECTION HEADER

QUESTIONS SECTION TEXT

Basic HTML markup is permitted.

Font Sizes

<> I_x

Questions

Which meal are you requesting delivery? (Breakfast will only be the breakfast special of the day) **(Required)**

- Breakfast
- Lunch
- Dinner

What grilled or fryer item are you requesting? You may select the Lunch or Dinner Special; however, this will be a dinner special for the day as we will not be able to update the specials (Please be as specific as you can and include condiments r

6

COPIES DOCUMENTS AUTHENTICATION



Copy Recipients is different than "Copies To" in Routing Rules



Supporting Documentation has a 5 GB max per submission



Not every IR Layout should use campus-based authentication (i.e. Single Sign-On)

Post-Submit Message



Thank you for submitting your report regarding the concerning behavior that you have witnessed on campus. The office of Excellence has received this report and will be looking into the matter shortly. Should you like to check the status of the investigation, please walk over to our campus office located at:

555 Everything is Gold Street

Platinum, Utopia 00220

You may also call our office at 504-555-2323.

A copy of this submission has been sent to you at lkivell@maxient.com.

Confirmation #00000760

[Need to submit another form?](#)



Post-Submit Email



Thank you for submitting your report. A member of the Student Conduct and Community Standards office will review it during business hours and reach out to you if they have any questions.

What happens next?

STEP 1: Investigation

- SCCS will contact the student and conduct a further investigation.
- Consult with you about allowing the student to complete the remaining coursework for the semester. (Generally students are allowed to complete this work.)
- Request that you submit an "incomplete" for a grade if the issue is not resolved by the end of the semester.



System update alert!

SPAM PREVENTION

Enter words and terms here, one per line, that have been found in spam IRs. Submitted IRs that contain one or more will be flagged as suspected spam and will not trigger CCs or text messages specified in routing rules.

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WHO CAN DO WHAT?



Who Can Submit



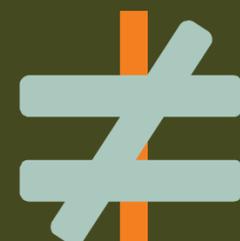
- Anyone with access to the link can submit
- Authentication is optional



Who Has Access



- Any user given permission via the IR Layout can see all submissions from that IR Layout



Who Can Edit



- Any Level 4 User can build or edit any IR Layout



Nature



Urgency



Location

Routing Rules

Tips and Considerations

- Remember your Routing Rules Trio
- Start broad
- Who's who
 - Primary recipient
 - Copy recipients
 - Default recipient
- Don't duplicate rules





RELATED FEATURES & SETTINGS



Watchlists

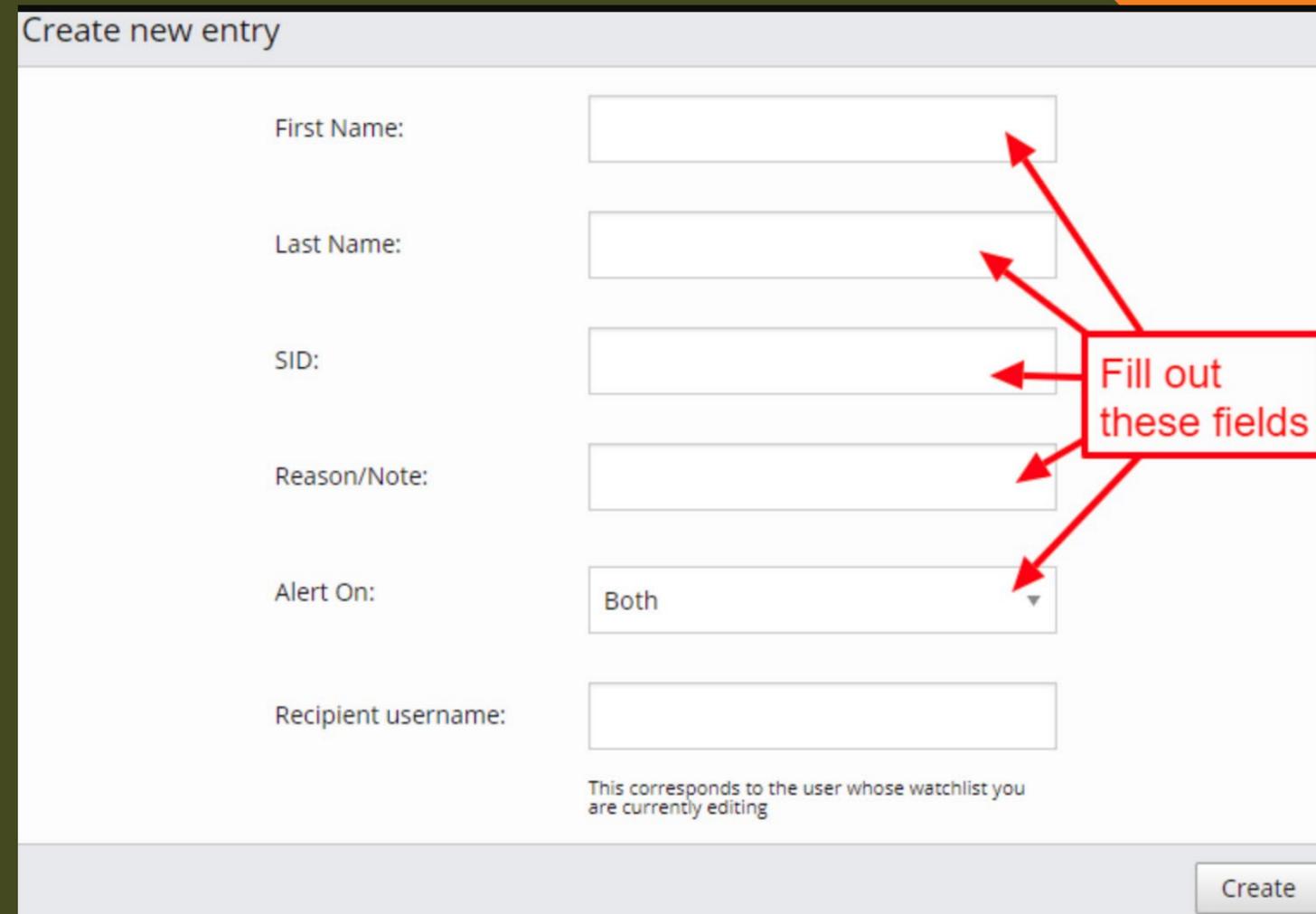
The watchlist allows you to receive immediate notification by email of new incidents and/or cases involving particular individuals.

Create new entry

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
SID:	<input type="text"/>
Reason/Note:	<input type="text"/>
Alert On:	<input type="text" value="Both"/>
Recipient username:	<input type="text"/>

This corresponds to the user whose watchlist you are currently editing

Create



More information about this feature can be found here: <https://support.maxient.com/hc/en-us/articles/360027264251-Manage-Watchlists>

Watchlists

A person on your watchlist is part of a newly-entered incident report.

Name:	James Halpert
SID:	987654007
Watchlist Reason:	Troublemaker
Routed To:	Norton Juster
Maxient Login:	Login to Maxient

Message sent by Maxient
THIS IS A NOTIFICATION ONLY. REPLIES WILL NOT REACH ANYONE.

More information about this feature can be found here: <https://support.maxient.com/hc/en-us/articles/360027264251-Manage-Watchlists>

Email Notifications

Would you like an email when a case is assigned/reassigned to you?

Yes No

Would you like an email when a CRF in progress is assigned/reassigned to you?

Option unavailable

Would you like an email when a letter in progress is saved for your review?

Yes No

Would you like an email when an incident report is forwarded to you by another user for subsequent action?

Yes No

When you are the primary recipient of a new incident report, you'll always see it on your Maxient homescreen. How would you like to be notified?

No notification ▼

When you are a secondary recipient (copied) on an incident report, how would you like to be notified?

Email me a copy ▼



In-System Notifications

notifications. For selected items, you will only receive a notification for actions that other users initiate. For example, if you have "New cases" selected, you will receive a notification when a new case is created by someone else and assigned to you. We will not send notifications to you about cases you create for yourself.

Receive an in-system notification for ...

- | | |
|---|---|
| New cases? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Reassigned cases? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| New Incoming Reports (IRs)? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Forwarded IRs? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| IRs on which you are copied? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Tasks? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| New notes in your cases written by others? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Pings? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Letters in progress that others have saved for your review? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| CRFs sent for your review? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Watchlist alerts? | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Addition of new members to a group? | <input type="radio"/> Yes <input checked="" type="radio"/> No |



Daily Digest

Subject: FW: [Maxient] Daily Report for September 23, 2019

Date: Wednesday, December 20, 2023 at 1:12:28 PM Central Standard Time

From: Shalin Shah

To: Shalin Shah

Music City University Incidents

September 23, 2019 6:00 am - September 29, 2019 6:00 am

Incident Time: September 20, 2019 12:00 PM

Location: Kistler Hall

Reported By: Michael Ginsburg

Submitted: September 23, 2019 9:39 pm

Dolly Parton (11111111) Female Victim - Residential student

** Below are categories that correspond to the Department of Residential Life Student Handbook, and the Student Code of Conduct. Please indicate the relevant sections that pertain to this incident report.

** RESIDENTIAL LIFE POLICIES

Property Loss and Theft

** STUDENT CODE OF CONDUCT

12. Theft

** Please provide a detailed description of the incident/concern using specific concise, objective language.

On Friday September 20th at 12:00pm. Resident Dolly Parton came up to Community Advisor Michael Ginsburg and told her that her bank card and student ID were missing from Resident Parton's room. Resident Parton told CA Ginsburg that she believes Resident Yearwood left the room unlocked while Resident Parton went to class. CA Ginsburg then told Resident Parton to call Music City College Police which responded at 1:00 PM. They talked to Resident Parton and took her information because CA Ginsburg had to go to class.

** Please list the names of all staff who responded to, or were contacted about, this incident, including Community Advisors, Public Safety, and Police Department. (Use Title First LAST. One person on each line.)

Dolly PARTON - RESIDENT
Trisha YEARWOOD - RESIDENT
Michael GINSBURG - Community Advisor
2 Campus Police Officers

** Who responded to the incident first?

Police

** Were emergency services called (police, ambulance, or fire)?

Yes

** Was someone transported to the hospital?

No

Incident Time: September 25, 2019 10:15 PM

Location: Maxcy Hall

Reported By: Lance Watson

Submitted: September 26, 2019 10:19 pm

Taylor Swift (999999999) Female Witness

** Below are categories that correspond to the Department of Residential Life Student Handbook, and the Student Code of Conduct. Please indicate the relevant sections that pertain to this incident report.

** RESIDENTIAL LIFE POLICIES

Tobacco Use Policy

** STUDENT CODE OF CONDUCT

10. Drugs

** Please provide a detailed description of the incident/concern using specific concise, objective language.

09/25/2019 at 9:09PM, Taylor Swift, texted Community Advisor (CA) Lex Kelch-Brickner stating that Swift saw some suspected marijuana residue in the trash can and the counter in the bathroom located at Maxcy Hall 2nd floor. CA Kelch-Brickner then went to check the bathroom out at 9:10PM. CA Kelch-Brickner looked through the bathroom and there was no one else besides resident Swift who was waiting for CA Kelch-Brickner. Resident Swift told CA Kelch-Brickner that resident Swift went into the bathroom and nobody else was in there besides the suspected marijuana residue in trash can and counter top.

After gathering the information, CA Kelch-Brickner decided to call the Area Coordinator on duty. AC Hark then instructed CA Kelch-Brickner to call Campus Police. Two officers arrived and CA Kelch-Brickner brought the officers who collected the suspected residue and then took the trash out to dispose of the contraband.

** Please list the names of all staff who responded to, or were contacted about, this incident, including Community Advisors, Public Safety, and Police Department. (Use Title First LAST. One person on each line.)

Police Officer - Johnny CASH
Police Officer - Dierks BENTLEY
Area Coordinator ON DUTY - Aaron HARK
Community Advisor ON DUTY- Lex KELCH-BRICKNER

** Were emergency services called (police, ambulance, or fire)?

Yes

** Was someone transported to the hospital?

No

** Was someone issued a citation or charges by the police?

No

Disposition: Pending with Shalin Shah as IR #000204506



Daily Digest

If you'd like to explore setting up a Daily Digest for your Incident Reports, reach us at support@maxient.com and tell us:

- Which IR Layout(s) should be included?
- Who should be “sending” the summary
- What office is providing the summary?



Analytics



Number	Analytic Title	Access Restriction Aware?
902	Routing Rules Report for Incident Report (IR) Layouts	N/A
903	IR Layout Field Values	N/A
916	Group Memberships	No





COMMUNICATION

Importance and Considerations



The Office of Community Standards and Student Responsibility

About Us ▾ The Community Standards Process ▾ Statements ▾ Faculty Resources ▾
Organizational Misconduct ▾ Conduct Records

[OHIO](#) » [Student Affairs](#) » [Community Standards](#) » [Academic Misconduct](#) » [The Student Conduct Process](#) » You Received a Letter

You Received a Letter

Community Standard Letters and Communication

The Office of Community Standards and Student Responsibility (CSSR) utilizes [Maxient](#) to send communication to students for many different matters. Maxient is the official software used by CSSR. CSSR will also send a text message when communication is sent if possible.

To access your communication, you will need to use your PID, including the P, to retrieve the communication per the instructions in your email. If you would like to confirm the validity of the email communication you received, you may give CSSR at phone call at 740-593-2629 and a staff member will assist you.

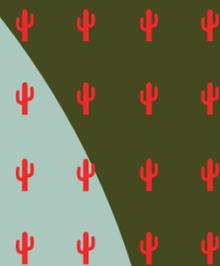
Community Standards Conference (CSC)

Student conduct scheduling letters are sent after CSSR has reviewed an alleged incident and determined if there is a possible [Student Code of Conduct](#) violation. CSSR staff review the student's schedule and schedule a meeting for the student to meet with their assigned hearing officer when the student is not in class. Meetings are scheduled Monday-Friday between the hours of 8:00am - 5:00pm Eastern Standard Time (EST).

Informational Website



Language Translation & Accessibility



Report Unlawful Harassment, Discrimination or Retaliation

Unlawful harassment and discrimination are behaviors based on someone's affiliation with a protected class (race, religion, gender, etc.) that is so pervasive, persistent, or severe that it would prevent a reasonable person from taking advantage of the educational or employment opportunities Cabrillo has to offer.

[SUBMIT A REPORT](#)

[En Español Aquí](#)

Report Sexual Misconduct

Sexual Misconduct includes gender-based discrimination, sexual harassment, dating violence, domestic violence, sexual assault, or stalking behaviors.

[SUBMIT A REPORT](#)

[En Español Aquí](#)

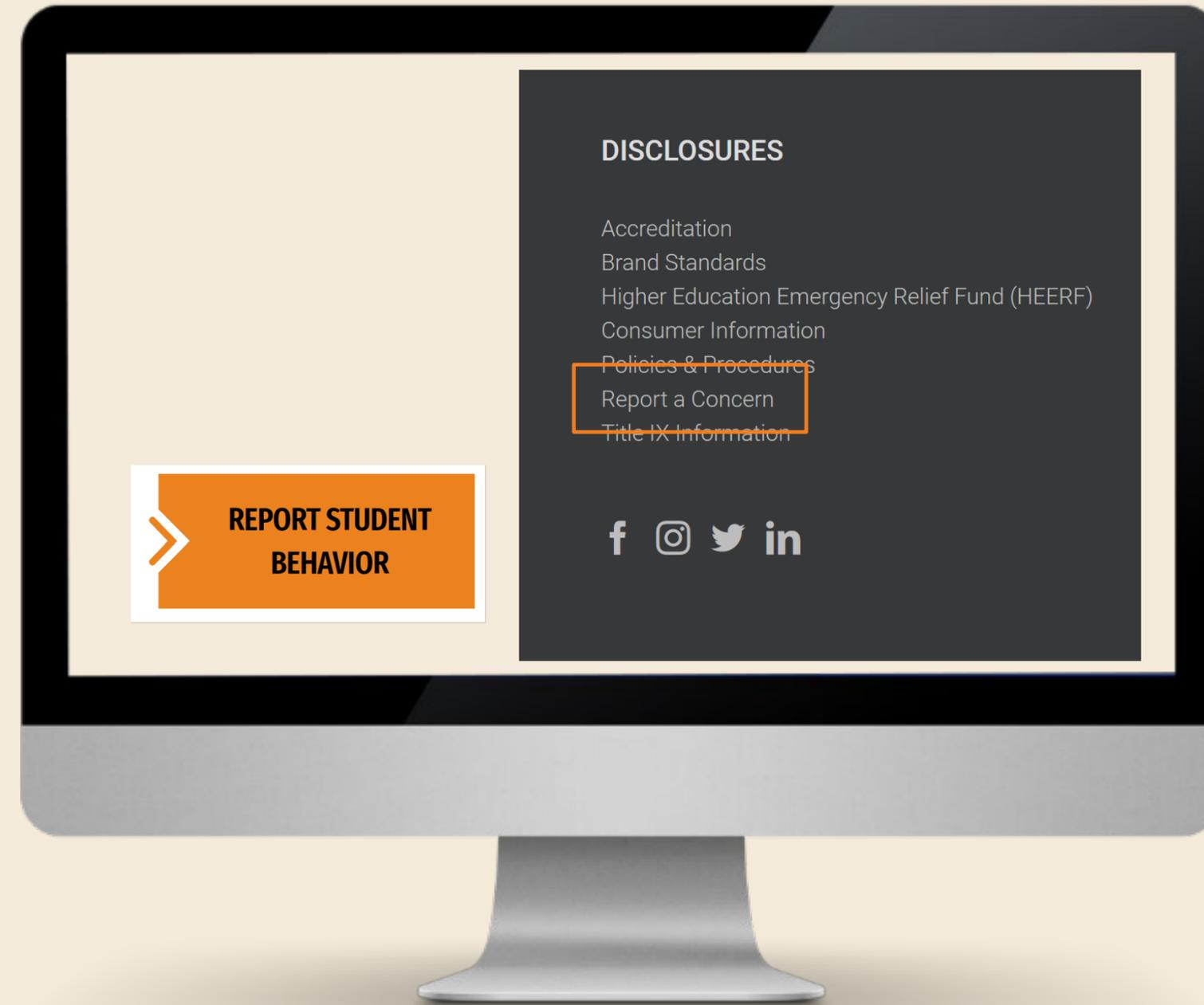
Filing a Title V Report (YouTube Video)

File a report: [File a Title V Report \(Online Form\)](#)

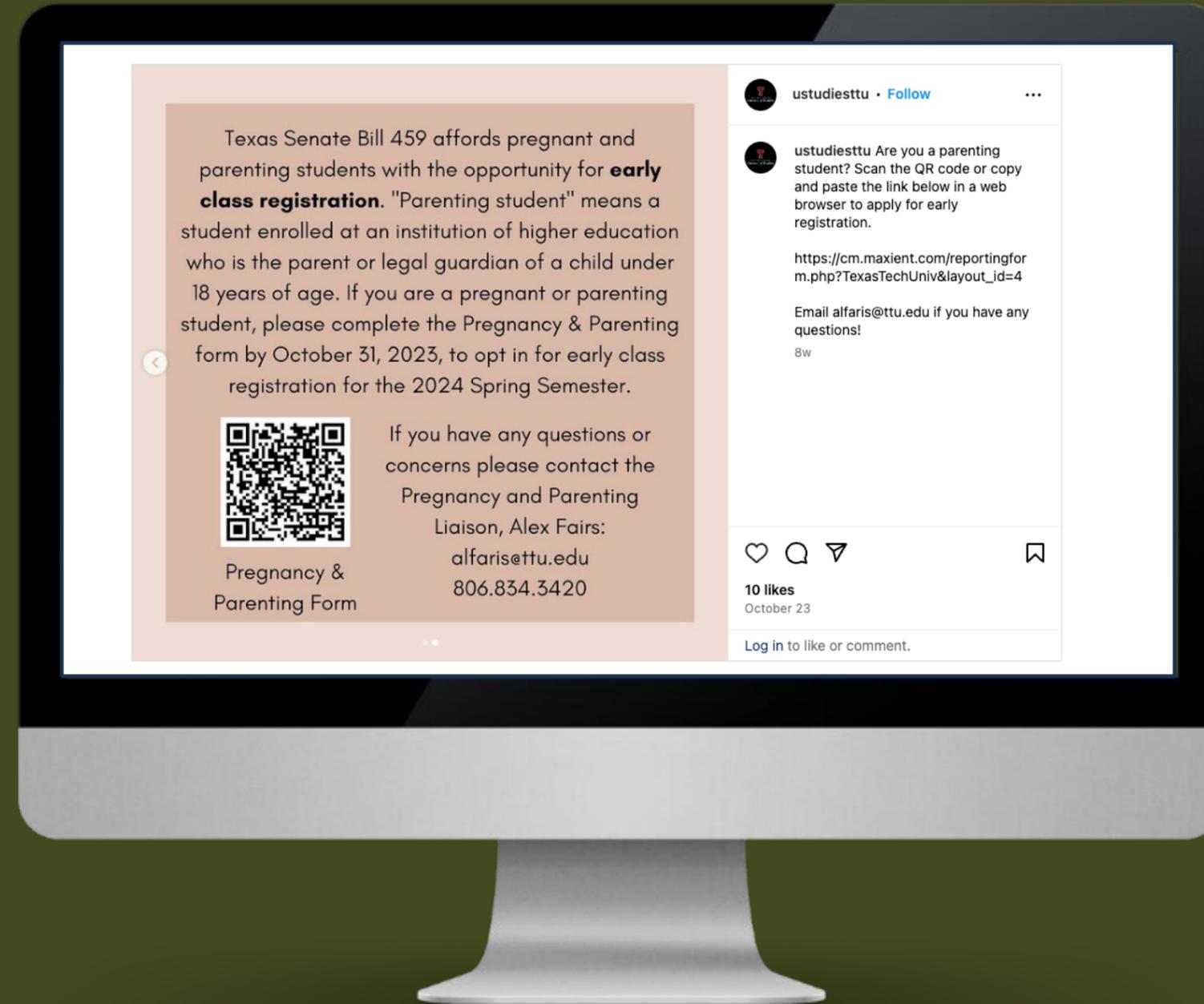


**Please visit video settings for subtitles available in English and Spanish.*

Static Buttons & Links



QR Codes & Social Media



Existing Resources & Programs



Title IX
Trainings



Bystander
Intervention
Programs



Substance
Education
Platforms



Faculty
Meetings



First Floor
Meetings



Onboarding

Be Proactive

THURSDAY, FEBRUARY 20, 2020

Emails from Maxient are safe for students to open



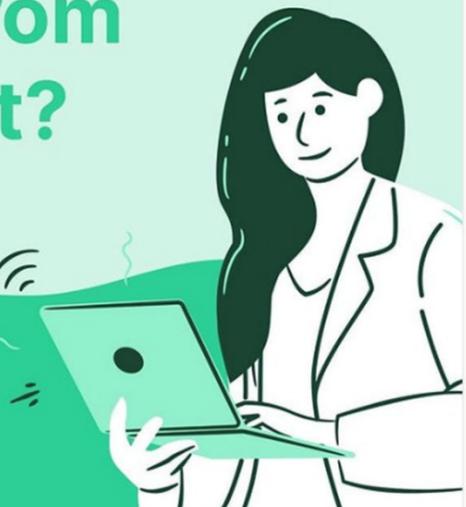
Awareness of online phishing scams has increased recently, making the average email user more wary of opening and interacting with messages from unfamiliar addresses. Phishing scams attempt to gain private information by tricking recipients into opening false links or websites. However, students may miss important communications from the

ucalgaryres · Follow

UNIVERSITY OF CALGARY

Have you been looking at your email recently and you

Received an email from Maxient?

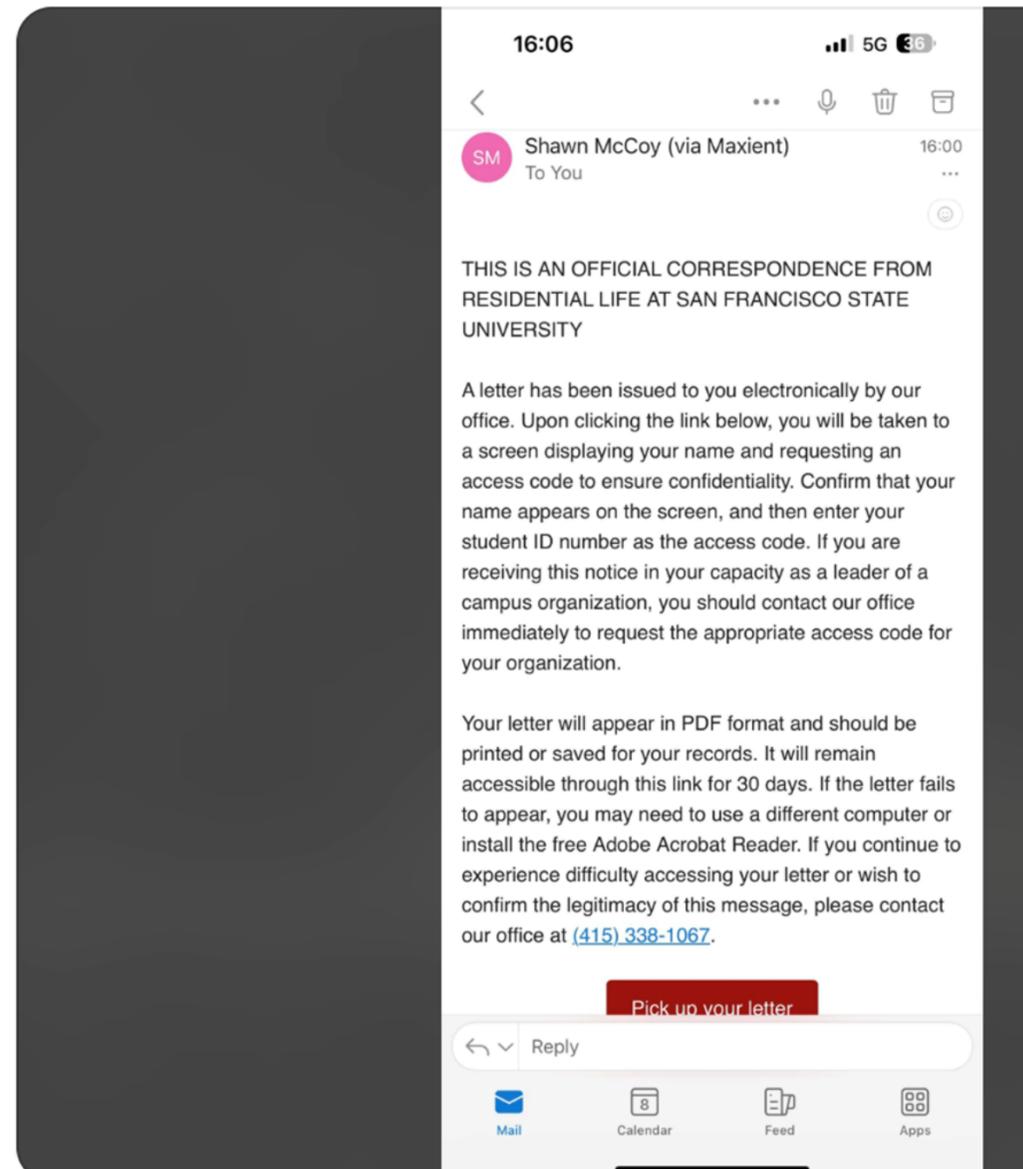


Emails from Maxient are NOT spam and are safe to open. It contains important messages about Residence.

Why It's Important

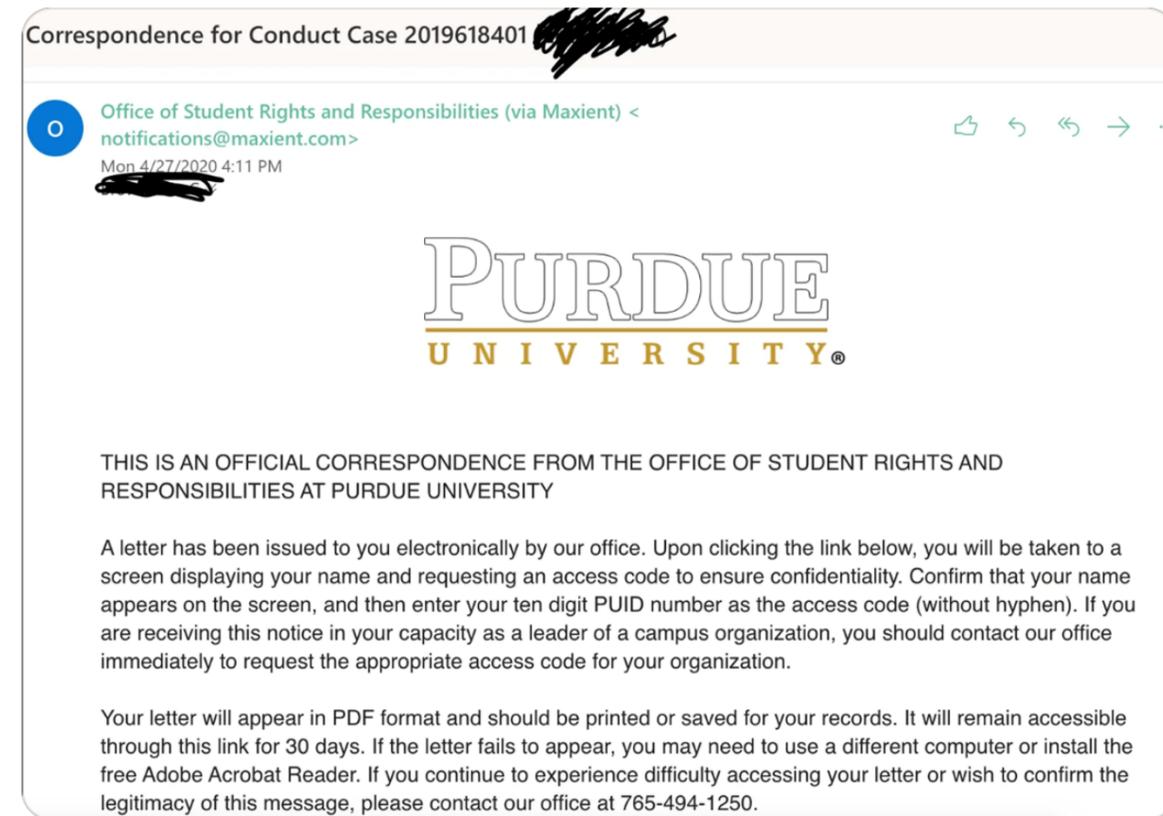
r/SFSU · 4 mo. ago
Sea-Distribution-235

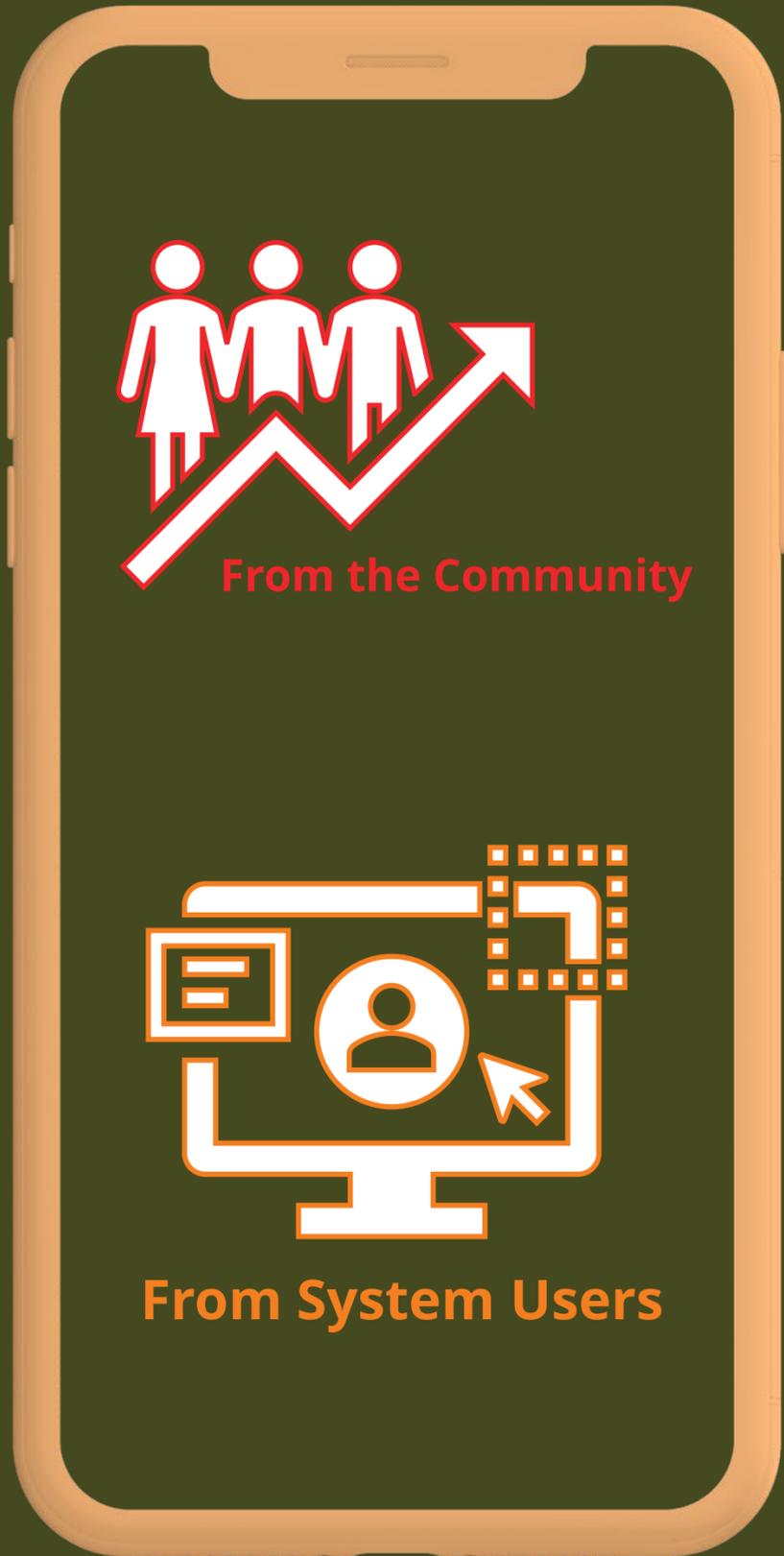
Phishing email?



r/Purdue · 4 yr. ago
rbinlon

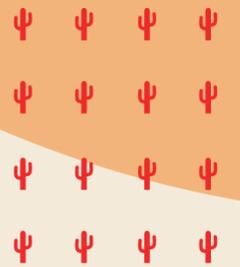
Is this a scam? (Maxient)





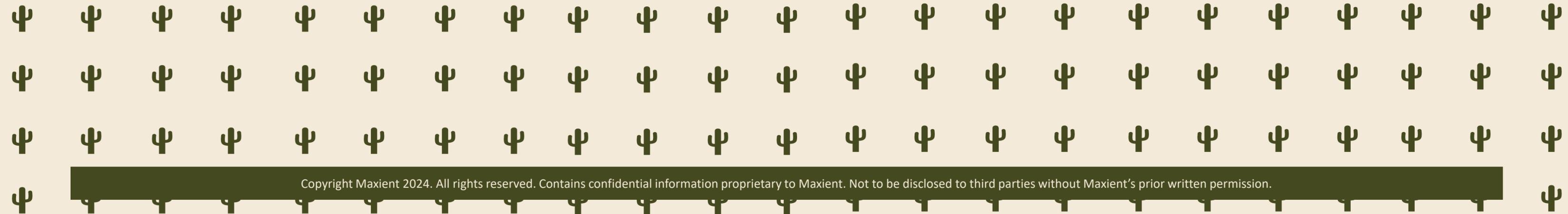
Gather Feedback

- How is your system and process perceived?
- Do individuals know how to engage with the system in their various roles?
- How are individuals using your external features such as IR Layouts, Landing Page etc..?
- Was there confusion over language or usage?
- Do individuals use the internal features such as Pings, Watchlists, etc.?



Be

Creative





Questions?

Need help in the future?

- Email support@maxient.com or click the  icon.
- Utilize help forums accessed via the  icon.

Need urgent help?

- Are you a Level 5 user? You can call us at 434-295-1748.

Have specific questions or need advanced help?

- Reach out to ask about a Client Success Advisor session.



Search

JUNE 2024

24 25 26 27
MON TUE WED THU

8:30 AM (MST)
Encanto B

8:30 AM 9:45 AM Data – More than a Four-Letter Word – Creating a Culture of Future-Oriented Data
Paradise Valley

8:30 AM 9:45 AM **If You Build It, They Will Come: How to Build IR Layouts**
Camelback

8:30 AM 9:45 AM Small Group Help Session A
North Mountain

8:30 AM 9:45 AM The Building Blocks of Communication: Letters and Forms
Deer Valley

Schedule My Schedule

Please provide us some feedback about your experience for the session you attended and help us plan for additional sessions next year!

Required *

1. Please rate your satisfaction with what you've learned from this session.

Please select a value

2. Please provide any additional thoughts including things that were especially beneficial or aspects that could be improved upon:

Your answer

3. Please provide your name and email address if you would like a response to any questions you have:

Your answer

0 of 3 answered Submit >

Please complete the **3-question survey** in Guidebook!

This is instrumental for future conference planning and very appreciated by your friendly, neighborhood Maxient staff!



Thank You!

MAXFEST

PHOENIX 2024

Making the Many, One

MaxFest 2024 – Phoenix, AZ

Presented By

Cortney Brewer, The Ohio State University

Jason McKean, Northwestern University

Jaime Poynter, University of Maryland



Introductions

Jason
McKean



Assistant Dean
Northwestern University
He/him/his

Cortney
Brewer



Senior Analyst
The Ohio State University
She / her / hers

Jaime
Poynter



Maxient Coordinator
University of Maryland
She / her / hers

Our Roles

- **Jason**

- Assistant Dean of Students and Director of Strategy and Operations (short title: Assistant Dean of Things)
- Responsible for oversight of Maxient across all users and user groups, whether within, or outside of, Student Affairs
- Working with all teams to ensure effective, efficient, and consistent processes and use

- **Jaime**

- Maxient Coordinator
- Positions in the Office of Student Conduct
 - Unofficial dotted line to Dean of Students
- Process all referrals for academic misconduct, non-academic, and students of concern (BETA, DOS)
- Responsible for overall Maxient management for conduct/conduct adjacent Maxient offices (*more on this later*)

- **Cortney**

- Senior Analyst, Consultation and Assessment Team and Maxient
- Positioned in Student Conduct; Level 5 User for all of Ohio State while providing addition
- Informal reporting to Associate Vice President/Dean of Students for Consultation and Assessment Team responsibilities
- Oversees a network of Level 4 “Super Users” who become content experts for their departments

Session Resources



go.osu.edu/maxfestresources

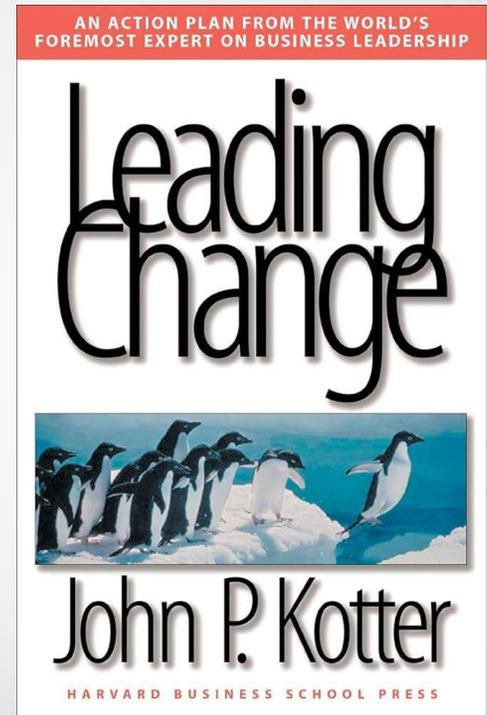


Our Goals (Today, Anyway)

- Theory
 - *Leading Change* by John P. Kotter
- Practice
 - Management of Maxient Users and Groups
 - Management of Maxient System Changes & Configurations
- Reflection
 - Questions & Discussion

Leading Change

- Considers change management and leadership
- **8 reasons** organizations fail at change
 - Allowing complacency
 - Insufficient leadership power
 - Lack of vision
 - Under-communicating the vision
 - Allowing obstacles
 - Failing to create short-term wins
 - Declaring victory prematurely
 - Failing to anchor change in the culture
- And, **8 ways** to overcome these challenges!



Leading Change: Establish Urgency



Leading Change: Create a Guiding Coalition



Leading Change: Develop Vision and Strategy



Leading Change: Communicate the Vision



Leading Change: Empower Broad Action



Leading Change: Generate Short-Term Wins



Leading Change: Consolidate Gains



Leading Change: Anchoring in the Culture





Management of Users and Groups

Maxient Data Confidentiality and User Agreement



Maxient Data Confidentiality and User Agreement

Completing and submitting this agreement indicates that you understand and accept responsibility for your actions in the performance of your responsibilities, which includes access to Maxient and Maxient records. Your form submission signifies that you are obligated to maintain the privacy of all data in accordance with university policies and procedures and you have read and understand this agreement in its entirety.

Please direct questions to the Maxient System Analyst:

Cortney Brewer
Maxient System Analyst
Office of Student Life - Student Conduct
brewer.412@osu.edu

You are currently authenticated as Cortney Brewer (she/her). [Not you?](#)

Your full name:	<input type="text"/>
Your position/title:	<input type="text"/>
Your OSU email address:	<input type="text"/>
Your Department <small>(Required)</small> :	<input type="text" value="Select one"/>
If Other, indicate what office:	<input type="text"/>

Maxient Data Confidentiality and User Agreement



As a Maxient user, you have an obligation to protect any and all confidential and/or sensitive information that you obtain through the Maxient database. As a user, you affirm that you have reviewed the Institutional Data Policy (IDP) and have completed any and all required IDP training (to be completed annually). By submitting this agreement, you understand and agree to the following:

1. I recognize that I have access to confidential records through Maxient.
2. I understand the applicable legal and university policy requirements related to records maintained in Maxient.
3. I will not share my individual login and password or allow others to access records using my account. I am responsible for storing and using my individual login and password in a secure manner.
4. I will not perform or permit unauthorized use of, or access to, any information or records maintained, stored or managed through Maxient.
5. I will not use email ingestion to upload personal health information (PHI) to the system.
6. I will not knowingly include false, inaccurate or misleading information in any report or record.
7. I will not delete any case record or subsequent report of data entry except in accordance with written guidelines issued by the Maxient System Analyst. Rationale of the removal of any case-related material should be documented in the General Notes of the case.
8. I understand that if I violate this agreement, I could be subject to corrective action, up to and including termination of my employment.

9. I will in no way discuss, copy, share or use the information in any other manner outside of the scope of my job responsibilities.
10. I understand that the Maxient database provides the system administrator with an audit trail option regarding each action a user performs within the system.
11. I understand that if an audit trail reveals unauthorized or inappropriate use of the system, my access will be immediately revoked and my supervisor will be informed of the agreement violation.
12. All student employees are expected and obligated to uphold the Code of Student Conduct.
13. I understand that any knowledge of a violation of this confidentiality agreement must be reported to the Maxient System Analyst immediately.

Please select below to indicate review and agreement with the expectations listed above (Required)

I understand and agree

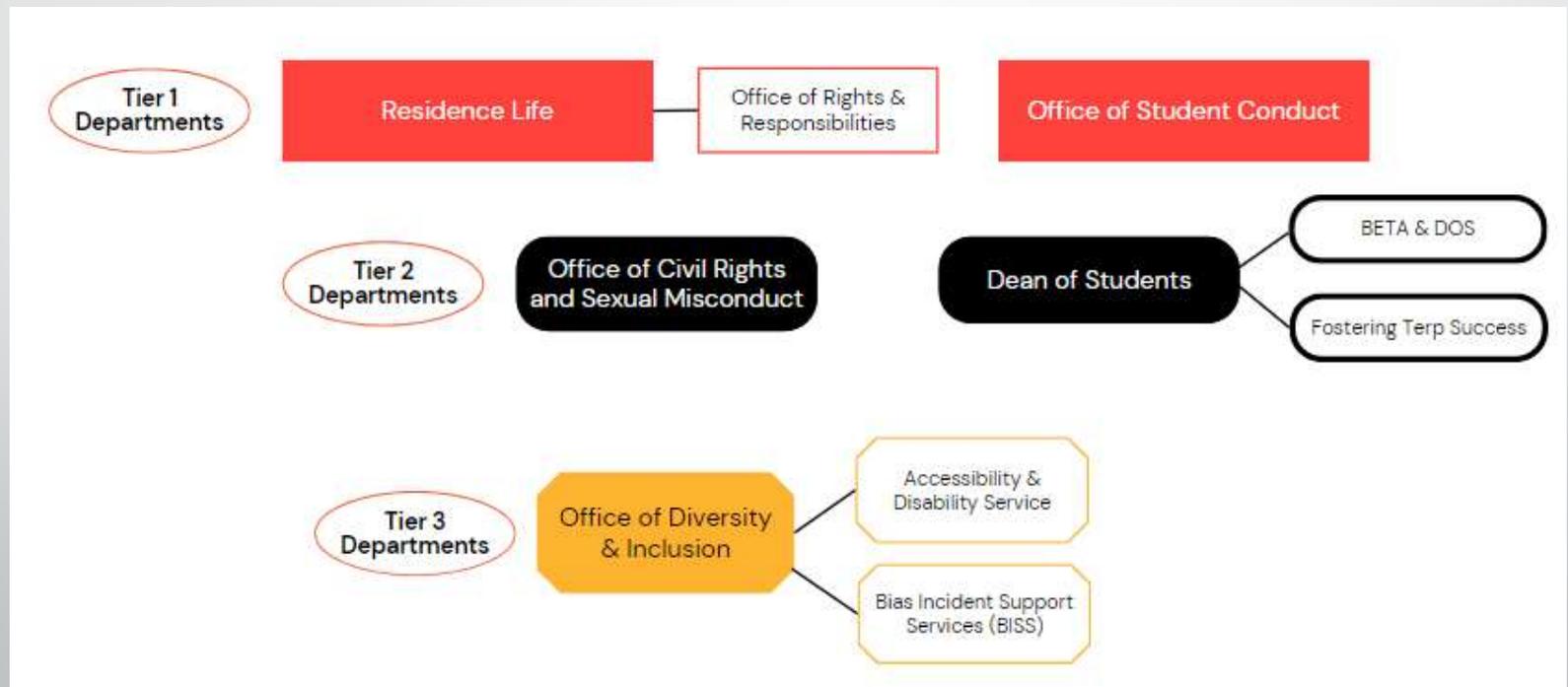
Email me a copy of this report

Submit



Managing Groups

Current Maxient Users





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Managing Groups

When everyone wants a piece of Maxient

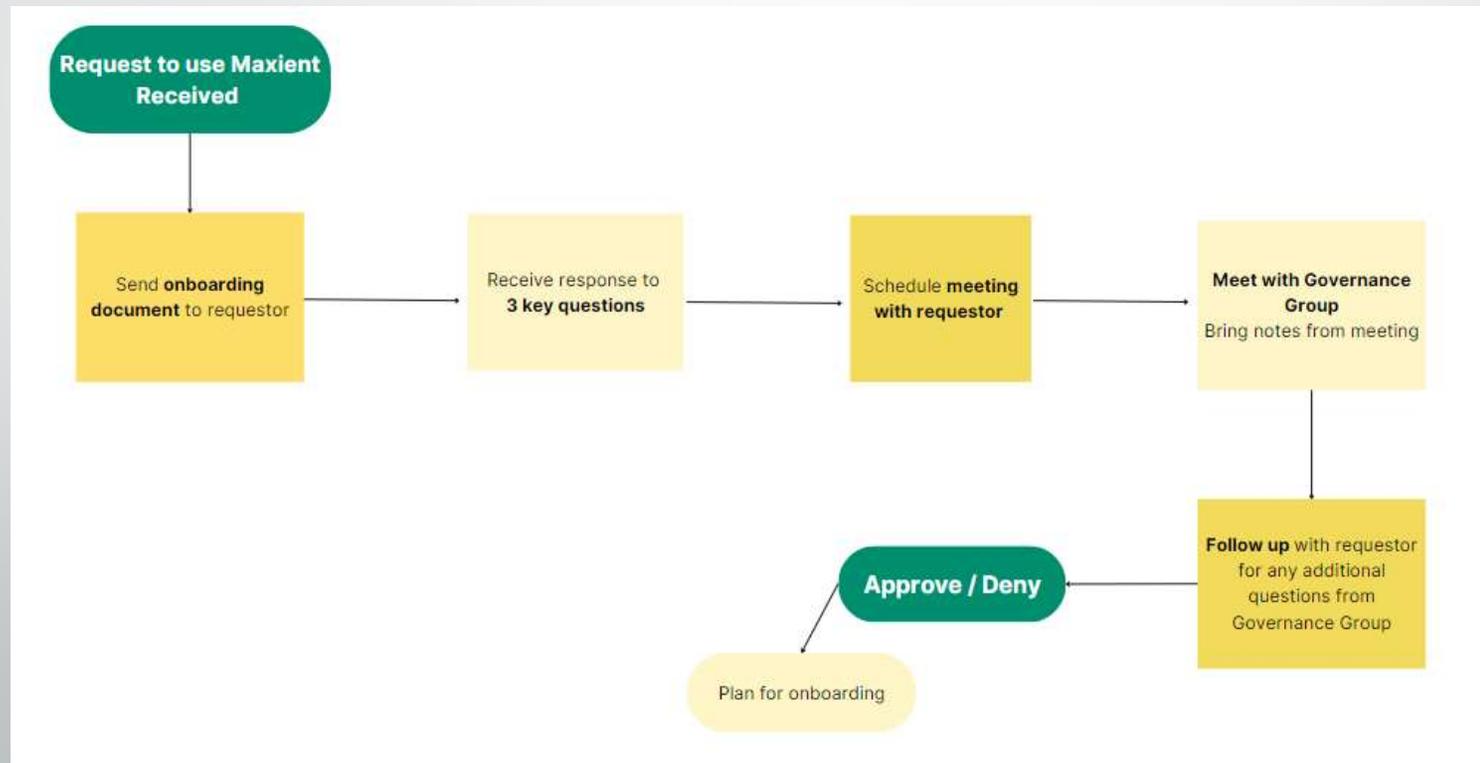
- Forming the Maxient Governance Team
 - Division of Student Affairs (Director of Technology)
 - Office of Student Conduct (Director, **Associate Director***, **Maxient Coordinator***)
 - Department of Residence Life (**Associate Director***)
 - Office of Rights & Responsibilities (**Assistant Director***)
 - Dean of Students (Dean, **Maxient Coordinator***)

***Level 5 Users**



Managing Groups

Managing Departmental Requests





Managing Groups

When everyone wants a piece of Maxient

- Managing Maxient request from new departments
 - Consistency of handling these requests
 - What is conduct adjacent?
 - Onboarding Document: [link](#)
- Financial impacts of bringing on new departments
 - Cost sharing for Maxient contract, onboarding, support
 - Departments outside on the traditional Maxient structure paying for onboarding/ongoing support
 - Access levels for new depts (when you're **maxed** out on level 5)

Maxient Governance Team

Managing Departmental Requests



3 Key Questions

1. Does the use of UMD Maxient meet the business use for conduct or conduct adjacent purposes?
2. If a unit uses UMD Maxient, will they be able to share in operational processes, such as referring conduct cases to the appropriate campus office?
3. If the business needs meet #1 and #2, then Maxient might be suitable. Operationally, units will need to be able to satisfy the following requirements:
 - Financially support their share of the annual Maxient license fee.
 - Financially contribute to any staffing overhead needed for initial onboarding and continual support and maintenance of Maxient.
 - Work within the current parameters of UMD's Maxient environment in order to minimize disruptions to current operations.
 - Adhere to a formal Memorandum of Understanding (MOU) which outlines how the system is used/shared with that particular unit.

Managing Groups

When everyone wants a piece of Maxient



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MARYLAND

- <https://docs.google.com/document/d/1DJaxbjSx7DBCoK9Ce6GQ5owfHPhhA9Xf2VuzpMTixdM/edit>

Unit Share of Annual Vendor License and Support Fee

As of FY24, the current contract holder is the Department of Resident Life, which pays for the entire annual invoice and recoups costs through chargebacks. The annual license fee allocation was formalized through MOUs between DRL and the respective departments as follows:

Unit	Percentage of Cost	FY25 License Fee
BISS	7%	
ADA	4%	
OCRSM	20%	
DRL	31%	
OSC	29%	
DFSL	5%	
OVPSA/DOS/FTS/BETA	4%	
Total	100%	

Setup / Onboarding Cost

Based on previous experience onboarding large and small scale needs, the following estimations provide general time and staffing requirements to onboard a unit into Maxient. The estimation will vary depending on the scale and complexity of a unit's needs.

Onboarding Task	Description	Estimated Time
Consultation	Meeting with client to discuss business needs	3 hours
Design, Building, and Testing in Maxient	<ul style="list-style-type: none"> • Configurations (new case type, access group, routing rules) • Adding Users • Tags • Analytics • Creating Letters* • Creating Incident Reports* • Charges/Sanctions* 	10 hours
Initial Training	Train users of the unit after completion of Maxient buildout	2 hours
Total Estimated Time		15 hours
Estimated FTE Rate		\$30/hour
Total Estimated Onboarding Cost		\$450

*may not be used/needed by all departments coming onto Maxient



Ongoing Support Cost

Currently, the Office of Student Conduct employs a Maxient Coordinator who provides direct day-to-day support of Maxient to multiple offices as part of their duty. The Maxient Coordinator also provides case support to OSC. Thus, as ongoing support of Maxient will be necessary to ensure optimal operation and data integrity, OSC may need to backfill casework with UG/GA staff in order to allow time for the Maxient Coordinator to provide other units with Maxient support.

Ongoing Support Tasks	Estimated Time
<ul style="list-style-type: none">• Consultation• Email template creation/edit• Form edits• Technical support coordination with Maxient team	5 hours per month
Total Annual Estimated Time	60 hours
Estimated UG/GA Hourly Staff Rate	\$15.00/hour
Total Estimated Ongoing Support Cost	\$900

Total Costs

One time cost:

- Setup / Onboarding (honorarium to OSC's Maxient Coordinator)
- Total Setup Cost: \$450

Annual cost:

- Maxient Contract: TBD
- Ongoing Support (paid to OSC for additional student staff): \$750
- Total Annual cost: TBD

Fee Payment

- KFS Transfer to OSC by XXXX date for one time setup and ongoing support cost



Level 5 User Group

History and Purpose

- History
 - Starting Point: small set of users, small set of functions, limited expectations
 - Current situation: large set of users, changed relationships, multiplying functions, varied expectations and needs
- Purpose
 - Establish a communications protocol so that we are all aware of changes happening in other parts of the system;
 - Consider standardizations and processes to facilitate information cross-over between groups when needed;
 - Discuss approaches and innovations that others might want to adapt to their area;
 - Review areas where our real-world actions aren't well-represented in the database;
 - Assess how we can best maintain the integrity of the data we're continually building;
 - Discuss the use of Maxient data to serve our missions, communities, and students.



Level 5 User Group *Membership*

- Each Maxient user group is represented:
 - Dean of Students/Off-Campus Life: Jason
 - Office of Community Standards: Director, and Associate Director
 - Student Assistance and Support Services: Assistant Dean
 - Office of Civil Rights and TIX Compliance: Case Manager
 - Bias Incident Response Team: Assistant Vice President
 - Residential Community and Support: Assistant Directors (2)
 - Student Affairs Assessment: Associate Director
- All members are Level 5 users *except* the BIRT and Assessment representatives



Level 5 User Group

Activities and Group Member Roles

- [Level 5 User Expectations](#)
- Implementation at local level
- Monthly Activities
 - Review issues and concerns; consult with colleagues
 - Check in on projects
- Site of strategic planning and change processes

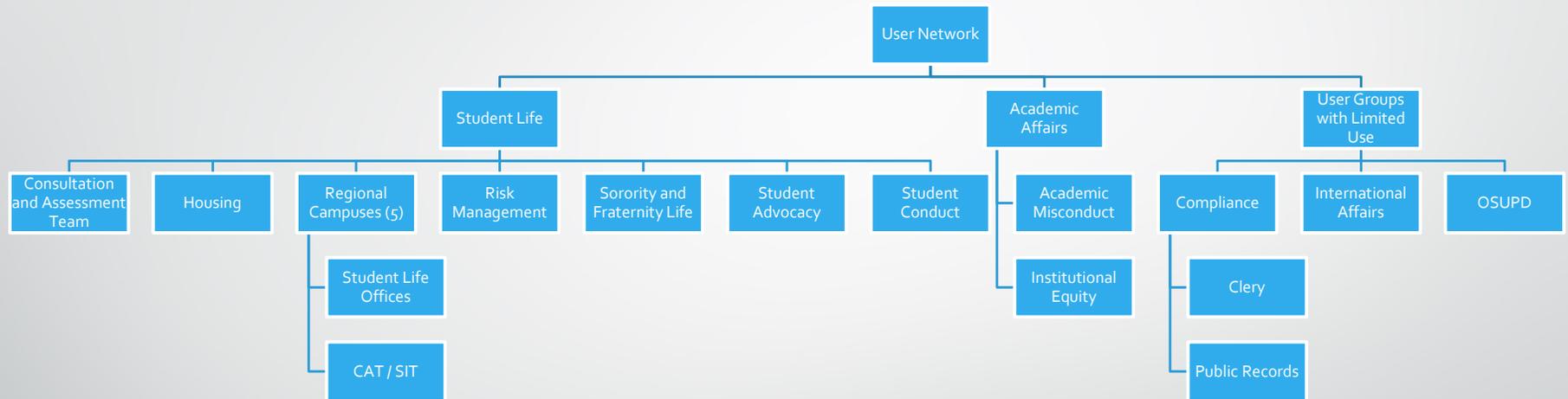


Maxient at Ohio State

- History

- 2009 – Housing and Residence Education onboarded Maxient
- 2013 – Student Conduct fully transitioned into Maxient (estimated)
- ???? – Student Advocacy onboarded a separate Maxient instance
- 2019 – Office of Institutional Equity established as a stand-alone office from Student Conduct
- 2019 – Maxient Administrator position created in Student Conduct
- 2021 – Student Advocacy “merged” into one instance of Maxient







Level 4 Super Users

- Designated users in departments who serve as the “Super User” of their team
- Serve as the main contact for new users, requests, etc.
- Schedule 1:1 meetings with the groups



Managing Change

Maxient Requests



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Maxient Request Form

This form is used to submit requests, concerns or questions to the Maxient System Analyst. Please enter your information and the details of your request below so that a staff member may follow-up with you. It is important to be detailed and thorough in the description of your issue(s) or system request(s). This will allow me to effectively handle your request. If you are asking multiple questions or making several requests in one report, please number them 1, 2, 3, etc. as this will make it easier for both parties.

Some details that are helpful for you to include (where applicable) are:

- Relevant fileID or case number
- Letter number or IR layout where you are having an issue or need assistance
- Name.# of the user(s) experiencing difficulty or access restriction
- If removing a staff member or user, include the user that should receive any active cases and/or routed IRs

Not all requests need to be submitted to the Maxient System Analyst. Each department has a designated user that has the access and is encouraged to make simple or cosmetic changes in the system. Before submitting this form, please contact your department's designated user (listed below) if you are uncertain about the nature of your request. Common requests that your department's designated user can assist with includes editing letter and/or IR language and duplicate case deletion.

If you have any questions about Maxient or this request form, please reach out to the Maxient System Analyst:

Cortney Brewer

brewer.412@osu.edu 

614-249-9857

- Formal Request Form
 - Submissions route to System Analyst with copies going to appropriate Level 4 Users
- Informal Requests
 - Email, Teams message, call, etc.



Tracking of Requests/Change Log

Case 20203794

Incident Date: 2021-01-01
Incident Time:
Incident Location: Incident Report
Report #: NO REPORT

Electronic File Cabinet

Persons Involved

Name	SID	Role
2021 Maxient Requests	MaxientAdmin	Recordkeeping
2021/2022 User Agreements	MaxientAdmin	Recordkeeping
2022 Maxient Requests	MaxientAdmin	Recordkeeping
2023 User Agreements	MaxientAdmin	Recordkeeping
2023 Maxient Requests	MaxientAdmin	Recordkeeping
2024 User Agreements	MaxientAdmin	Recordkeeping
2024 Maxient Requests	MaxientAdmin	Recordkeeping

Incident description Collapse

Maxient request records

Individual Files

[Add folder](#) [De/Select all](#)

FILE	DETAILS	ACTION	SIZE	DATE ADDED
▶ <input type="checkbox"/> COAM				
▶ <input type="checkbox"/> HRE				
▶ <input type="checkbox"/> OIE				
▶ <input type="checkbox"/> Other				
▶ <input type="checkbox"/> Student Advocacy				
▶ <input type="checkbox"/> Student Conduct				
▶ <input type="checkbox"/> System Administration				

Types of Requests



- Configuration Updates
- System Access
- Updates – New Analytics, Charges, Sanctions, IR Layouts, Letters
- General Problem Solving



Cultivating a Data Minded Culture

- Engaging Student Conduct staff in auditing of their own cases in order to create a greater sense of personal responsibility and accountability for their role in Maxient
 - Monthly auditing of high error case points
 - Cases closed with incomplete sanctions
 - Missing CRFs
 - Bi-monthly auditing of Clery data



Configuration Update Process

How It Started

- Configuration management previously fell under no person or office.
- The results of that:
 - Gender could include “trans*,” “transgender,” “non-binary,” or one’s pronouns, depending on the report.
 - 6 different ways to designate “respondent,” and 5 ways to designate “complainant,” depending on the report.
 - 11 Classifications in our Demographics feed, compared to 30 in cases
 - No updates to Clery-associated charges since...
 - No updates to TIX-associated charges since...



Configuration Update Process

How It's Going

Expanded People
Finder usage

Updated TIX-
associated
Charges

Updated Clery-
associated
Charges/Locations

Revised Resolution
Types and
Findings

Revised IR Roles

Revised Wellness
Charges/Tags

Created Manual
Feed

Established Note
Categories

Revised "Status"
Listings

Updated the Clery
Configuration



Configuration Update Process

What Made it Go

- Establishing Urgency: use of Maxient health check reports
- Guiding Coalition: Maxient Level 5 User Group
- Vision and Strategy: [Maxient Configuration Review.docx](#)
- Short-Term Wins: Go Green!
- Communicate the Vision: Teams Channel
- Empower Broad Action: SOPs



Configuration Update Process

What's Next

- Reporting and Case Creation when matters overlap offices
- Review and Reconfiguration of Offices
- Review and Reconfiguration of Case Types
- Review and Reconfiguration of Charges
- Review and Revision of SASS process
- Adding (at least one) additional office
- Thinking more carefully about data and its use

Maxient Coordinator Position

- How this role came to be at UMD
- [Position Description](#)
- Considerations:
 - Campus Partner training & support
 - Data requests (media, FOIA)
 - Case processing consistency and timing
 - Case input
 - Moving cases forward / dashboard management
 - System overhauls (ex. Code changes)



Maxient Analyst Roles

- [Maxient System Analyst Job Description](#)
- [Senior Analyst Job Description](#)
- Considerations:
 - Where should this position be housed and how will that impact their responsibilities?
 - Relationships with Campus Partners
 - Auditing



Questions & Discussion

Keep in Touch!

- Cortney Brewer – brewer.412@osu.edu
- Jaime Poynter – jpoynter@umd.edu
- Jason McKean - jason.mckean@northwestern.edu



go.osu.edu/maxfestresources

Level 5 User Expectations

1. Configuration File changes
 - a. If the change may impact other units' usage (e.g., tags, locations, case types, findings, etc.) pre-check the proposed change with the Assistant Dean/Director of Strategy and Operations (ADDSDO) and plan for implementation.
 - i. If in doubt on this point, then pre-check!
 - ii. Inform the ADDSDO once the change is made, for integrity-testing.
 - iii. Inform other Level 5 users of the change.
 - b. If the change has minimal usage impacts for other units (such as adding a user role, which other units will see but will not change their own operations):
 - i. Inform the ADDSDO once the change is made, for integrity-testing.
 - ii. Inform other Level 5 users of the change. This may occur at the monthly Maxient group meeting.
2. Expunging Reports
 - a. Level 5 users may expunge reports independently for test reports and *exact* duplicate reports.
 - b. Level 5 users may also do so independently when they have worked with another user to re-submit a poorly written report, keeping only the revised version.
 - i. In this case, the Level 5 user must ensure that all accurate substantive details transfer from the poorly written report, to the new version.
 - ii. This function should not be used for reports submitted because the information available has developed or shifted as more has been learned, nor for reports submitted to correct inaccurate information.
 - c. Any other rationale for expunging a report must be pre-checked with the ADDSDO.
3. Adding/Managing/Deleting IR Layouts
 - a. Either the ADDSDO or the Level 5 user may implement the change.
 - b. Level 5 users should notify the ADDSDO when attempting to add or adjust reports, and *especially* when changing routing rules.
 - c. The Level 5 user should communicate the change to other Level 5 users once complete.
 - d. The ADDSDO can also participate in the change through integrity-testing, and consulting with Maxient's helpdesk as needed.
4. Adding/Managing/Deleting Users
 - a. Level 5 users should notify the ADDSDO when new users must be added to, or removed from, the database.
 - b. Either the ADDSDO or the Level 5 user may implement the change.
 - c. The Level 5 user should communicate the change to other Level 5 users once complete.
 - d. The ADDSDO can also participate in the change through integrity-testing, and consulting with Maxient's helpdesk as needed.
5. Adding/Managing/Deleting Charges

- a. Level 5 users must consult with units whose usage will be affected by changes, in advance of making them (for instance, edits to Wellness charges should result from collaboration with SASS, Res Ex, and the DOS); the ADDSO should be included on these consultations.
 - b. Either the ADDSO or the Level 5 user may implement the planned change.
 - c. The ADDSO can also participate in the change through integrity-testing, and consulting with Maxient's helpdesk as needed.
6. Adding/Managing/Deleting Sanctions
- a. Level 5 users must consult with units whose usage will be affected by changes, in advance of making them (for instance, edits to sanctions should result from collaboration between Res Ex and OCS); the ADDSO should be included on these consultations.
 - b. Either the ADDSO or the Level 5 user may implement the change.
 - c. The ADDSO can participate in the change through integrity-testing, and consulting with Maxient's helpdesk as needed.
7. Adding/Managing Letters
- a. Level 5 users must consult with units whose usage will be affected by changes, in advance of making them.
 - b. Once the Level 5 user has made the change, the ADDSO and all other impacted Level 5 users should be notified.

Updating Maxient – Work Areas

Area	Key Tasks	Person/Group Responsible	Timing
Expanding use of PeopleFinder	Update configuration file with listing of NetIDs for all staff approved for use	Consult with Maxient list to develop group Jason updates	Complete
Update TIX charges in configuration file	List all charges associated with TIX matters in the configuration file	Consult with OCR to ensure all charges included Jason or Tiffany updates	Before Fall Quarter
Update Clery locations in configuration file	<ol style="list-style-type: none"> 1. Determine list of Clery on-campus locations 2. Determine list of Clery res hall locations 3. Determine list of Clery non-campus locations 4. Determine list of Clery public property locations 5. Add to configuration file 	Consult with Joseph/Magdalena for halls Consult with Lucas Christain/Alex Rea Jason updates	Before Fall Quarter
Update Clery charges	<ol style="list-style-type: none"> 1. Determine all Res Life, OCR, Code of Conduct charges with a Clery crime association 	RCS/OCR/OCS representatives submit listing to Jason Jason updates	Before Fall Quarter
Update Role categories per IR	<ol style="list-style-type: none"> 1. Review/approve proposed listing of roles 2. Add to each report as appropriate 3. Add instructions to each report as appropriate 	Representatives review with respective offices. Jason updates roles in configuration file, and in each incident report. Jason adds instructions to each incident report.	Before Fall Quarter
Update Charges/Tags for Wellness cases	<ol style="list-style-type: none"> 1. Review existing charge/tag structure 2. Revise to fit with current needs, as well as desired metrics 3. Articulate to past charges (for data transition) 	Nadim, Magdalena, Jason	Before Fall Quarter

Update Groups (Access Restrictions) and Types	<ol style="list-style-type: none"> 1. Review current groups and types for effectiveness. 2. Establish rationale for groups set up (comms, sharing) 3. Assign persons, charges, and letters to those groups 4. Determine whether all cases must have an access restriction; adjust configuration file accordingly 	TBD	Before Winter Quarter 2024
Update Gender categories in Configuration File	<ol style="list-style-type: none"> 1. Consult with Registrar on Gender categories used by the University 2. Add to configuration file 	Jason	Before Winter Quarter 2024
Create manual feed entries	<ol style="list-style-type: none"> 1. Determine list of entities or persons needing a profile of their own. 2. Craft those profiles and publish to users 3. Transition current cases to the new profiles 	TBD; likely need candidates for profiles from OCR and OCS, maybe RCS as well	During Fall or Winter Quarter
Clean Charge Listings	<ol style="list-style-type: none"> 1. Review current and historical charge listings 2. Delete charges no longer in use (e.g., pre-2015 Code of Conduct charges) 3. Determine cut-off point for charge inclusion (OCR only) 	TBD, likely need OCS and OCR input	Before end of 2023-24 Academic Year
Establish Departmental Note Categories	<ol style="list-style-type: none"> 1. Generate list of note categories. 2. Enter into configuration file with departmental dividers 	Office representatives submit list to Jason; Jason updates	TBD
Remove cases outside the document retention window	<ol style="list-style-type: none"> 1. Determine case lists 2. Work with Maxient to delete 	TBD	TBD
Update Status List	<ol style="list-style-type: none"> 1. Review existing list 2. Determine and make changes/additions/deletions 	Office reps discuss with the Maxient Group to determine lists; Jason updates	TBD

Update Sanctions/Actions List	TBD	TBD	TBD
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The Office of Student Conduct (OSC) seeks an experienced Maxient user to serve as the university's Maxient System Coordinator. This position is responsible for the security and functionality of the Maxient case management system and will provide oversight over and training for all Maxient user groups across multiple departments within and outside of the Division of Student Affairs. This position will also provide case administration and organizational support to the Office of Student Conduct and the Behavioral Evaluation and Threat Assessment (BETA) Team. The staff member will coordinate the management of disciplinary data using Maxient, Adobe, MS Excel, MS Word, and Google Suite tools. These functions entail the entry of data, the manipulation of data, and the preparing of reports. The Maxient System Coordinator will review Clery data for reports directly managed by Student Conduct and represent the office as its Clery liaison to the university's Clery Coordinator. If necessary, this person would also assist in the resolution of referrals submitted to OSC.

- Input all academic, non-academic, and BETA referrals into Maxient system including all supporting documentation
- Route referrals to appropriate staff and provide status information as necessary
- Redact information on referrals and supporting documents
- Create and manage case files for new Student Conduct referrals
- Manage data concerning sensitive records to insure accuracy and confidentiality in support of meeting institutional and federal requirements for disciplinary records (FERPA, HIPAA, Title IX, etc.)
- Prepare data files & reports for monthly and annual report, in addition to reports as requested
- Manage and update staff cases and dashboards as appropriate, including entry of completed sanctions, removals of disciplinary holds, sending out appropriate follow up correspondence to students, etc.
- Respond to inquiries regarding student disciplinary histories, student background checks, and staff disciplinary concerns
- Assist with scheduling of student disciplinary meetings
- Update and maintain letters and forms for OSC processes
- Input, assign, and follow up of BETA referrals to the Dean of Students Office
- Attend BETA meetings
- Work with the Dean of Students Staff to ensure proper communication with students of concern
- Update and maintain letters and forms for BETA processes
- Train new Maxient users in all departments that use the software in the course of their duties (Student Conduct, Dean of Students Office, Office of Diversity and Inclusion, Department of Resident Life, etc.)
- Provide guidance as necessary to Maxient users
- Independently manages the records and reports associated with student disciplinary cases and records
- Create and maintain forms for campus Maxient users as necessary
- Compile and provide Clery reportable information to Clery coordinator
- Other duties as assigned.

A Bachelor's Degree or equivalent degree (or higher) in higher education or related field. A minimum of one year of full-time experience or two years part-time in a post-secondary institutional setting, specifically in student conduct administration, is required. Direct experience in disciplinary processes and student behavior management is required.

- Familiarity with Maxient student conduct software is preferred

- Two years experience in administrative staff work
- Experience with behavioral or academic misconduct case management and resolution is preferred
- Clear adherence to professional and personal ethics.
- Strong organizational skills and attention to detail

UMD Maxient Licensing, Onboarding and Support Fee Proposal

Annual Vendor License and Support Fee



Unit Share of Annual Vendor License and Support Fee

As of FY24, the current contract holder is the Department of Resident Life, which pays for the entire annual invoice and recoups costs through chargebacks. The annual license fee allocation was formalized through MOUs between DRL and the respective departments as follows:

Unit	Percentage of Cost	FY25 License Fee
BISS	7%	[REDACTED]
ADA	4%	[REDACTED]
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DRL	31%	[REDACTED]
OSC	29%	[REDACTED]
DFSL	5%	[REDACTED]
OVPSA/DOS/FTS/BETA	4%	[REDACTED]
Total	100%	[REDACTED]

Factors to Aid in Cost Allocation Determination

The allocation of cost for each unit has generally been determined by taking following metrics into consideration:

- Estimated scale of incidents
- Estimated number of letter templates
- Estimated number of users

Annual Review Fee Process

Annually, the UMD Maxient Governance Team will work with each unit to confirm or request changes to the allocation. The reallocation of cost may be determined by additional units onboarding or offboarding, changes in vendor fee, etc.

Setup / Onboarding Cost

Based on previous experience onboarding large and small scale needs, the following estimations provide general time and staffing requirements to onboard a unit into Maxient. The estimation will vary depending on the scale and complexity of a unit's needs.

Onboarding Task	Description	Estimated Time
Consultation	Meeting with client to discuss business needs	3 hours
Design, Building, and Testing in Maxient	<ul style="list-style-type: none">• Configurations (new case type, access group, routing rules)• Adding Users• Tags• Analytics• Creating Letters*• Creating Incident Reports*• Charges/Sanctions*	10 hours
Initial Training	Train users of the unit after completion of Maxient buildout	2 hours
Total Estimated Time		15 hours
Estimated FTE Rate		\$30/hour
Total Estimated Onboarding Cost		\$450

**may not be used/needed by all departments coming onto Maxient*

Ongoing Support Cost

Currently, the Office of Student Conduct employs a Maxient Coordinator who provides direct day-to-day support of Maxient to multiple offices as part of their duty. The Maxient Coordinator also provides case support to OSC. Thus, as ongoing support of Maxient will be necessary to ensure optimal operation and data integrity, OSC may need to backfill casework with UG/GA staff in order to allow time for the Maxient Coordinator to provide other units with Maxient support.

Ongoing Support Tasks	Estimated Time
<ul style="list-style-type: none">• Consultation• Email template creation/edit• Form edits• Technical support coordination with Maxient team	5 hours per month
Total Annual Estimated Time	60 hours
Estimated UG/GA Hourly Staff Rate	\$15.00/hour
Total Estimated Ongoing Support Cost	\$900

Total Costs

One time cost:

- Setup / Onboarding (honorarium to OSC's Maxient Coordinator)
- Total Setup Cost: \$450

Annual cost:

- Maxient Contract: TBD
- Ongoing Support (paid to OSC for additional student staff): \$750
- Total Annual cost: TBD

Fee Payment

- KFS Transfer to OSC by XXXX date for one time setup and ongoing support cost

- KFS Transfer to DRL by XXXX date for chargeback cost of vendor license

DRAFT

Framework for Onboarding Decision for Student Conduct , Title IX, and Behavioral Threat Assessment Management System

This document serves as a framework to help units considering the use of the current software system used to manage official UMD records and cases related to manage student disciplinary records, Title IX (TIX) records, and behavioral threat assessments.

Overview

- The currently adopted tool to manage official institutional records and cases for student conduct, Title IX (TIX) records, and behavioral threat assessments is Maxient.
- The use, configuration, and management of Maxient are governed by a committee composed of representatives from multiple units involved with managing student disciplinary records, Title IX (TIX) records, and behavioral threat assessments.
- Use of a conduct management system is necessary to ensure regulatory compliance, mitigating institutional risk, and general support of student well being through proactive management of student disciplinary records, TIX records, and behavioral threat assessments.
- The current UMD Maxient environment has been designed and managed for student conduct and conduct-adjacent case uses. This has a direct impact on the data structure design, administrative access assignment, data integrity needs of multiple units, user interface design, etc.
 - “Conduct-Adjacent” includes all student behavioral matters that require student support, oversight, or management. Examples include crisis management, behavioral concerns, or students at risk.

Review and Decision Process

The governance committee overseeing Maxient serves as the body to receive and process any requests to join, exit, modify the system, or amend the existing vendor contract. This committee will also provide transparent rationale for any decisions made or recommended.

In order to provide transparency to all interested parties, below are a set of critical decision points that the governing committee requires to deliberate:

Decision points to determine if a unit should use the current UMD Maxient environment:

1. Does the use of UMD Maxient meet the business use for conduct or conduct adjacent purposes?
 - To maintain operational integrity, security, and performance, UMD Maxient should be used for conduct and conduct adjacent use.
2. If a unit uses UMD Maxient, will they be able to share in operational processes, such as referring conduct cases to the appropriate campus office?
 - This would allow institutional situational awareness through inter-agency cooperation and information sharing. It also allows official offices responsible for conduct, students of concern, and threat assessment to have some level of

awareness to address institutional requirements through the approved processes and protocols.

3. If the business needs meet #1 and #2, then Maxient might be suitable. Operationally, units will need to be able to satisfy the following requirements:
 - Financially support their share of the annual Maxient license fee.
 - Financially contribute to any staffing overhead needed for initial onboarding and continual support and maintenance of Maxient.
 - Work within the current parameters of UMD's Maxient environment in order to minimize disruptions to current operations.
 - Adhere to a formal Memorandum of Understanding (MOU) which outlines how the system is used/shared with that particular unit.

MOU Terms:

1. By May 1 each year, Unit/Department will transfer the funds to cover its share of the maintenance/license fees associated with Maxient, LLC disciplinary database.
2. As of 2024, the total annual cost to the campus for Maxient service is \$14,000.
3. Unit/Department annual share is determined by the consortium of members using Maxient to ensure equitable distribution of the total license cost.
4. Each department agrees to provide as much notification as possible with any intent to change or end their agreement with Maxient.
5. The DSA IT team is responsible for transferring student demographic data to Maxient. Any request for data changes must be submitted to the Governance team.
6. Since all departments are sharing a single instance of Maxient, the Governance team will coordinate all implementation and setup to ensure cases can only be accessed by respective departments.
7. Unit/Department will agree to support any staff or vendor costs for initial implementation or any ongoing maintenance.

This Memorandum of Understanding shall be evaluated periodically or when agreed upon by all parties, adjusted accordingly.



THE OHIO STATE UNIVERSITY

Maxient Request Form

This form is used to submit requests, concerns or questions to the Senior Analyst. Please enter your information and the details of your request below so that a staff member may follow-up with you. It is important to be detailed and thorough in the description of your issue(s) or system request(s). This will allow me to effectively handle your request. If you are asking multiple questions or making several requests in one report, please number them 1, 2, 3, etc. as this will make it easier for both parties.

Some details that are helpful for you to include (where applicable) are:

- Relevant fileID or case number
- Letter number or IR layout where you are having an issue or need assistance
- Name.# of the user(s) experiencing difficulty or access restriction
- If removing a staff member or user, include the user that should receive any active cases and/or routed IRs

Not all requests need to be submitted to the Senior Analyst. Each department has a designated user that has the access and is encouraged to make simple or cosmetic changes in the system. Before submitting this form, please contact your department's designated user (listed below) if you are uncertain about the nature of your request. Common requests that your department's designated user can assist with includes editing letter and/or IR language and duplicate case deletion.

If you have any questions about Maxient or this request form, please reach out to the Senior Analyst:

Cortney Brewer

brewer.412@osu.edu  (mailto:brewer.412@osu.edu)

614-249-9857

You are currently authenticated as **Cortney Brewer (she/her)**. [Not you?](#) 

https://cm.maxient.com/reportingform.php?OhioStateUniv&layout_id=40&logout=true

Full name:

Role/Title:

Your OSU email address:

Department/Home Office:

Your unit's designated user(s) (Required):

New Users and Deleted users

Please provide the following information for new accounts and accounts to be deleted.

Name  

Select Role

Phone number

Email address

Add another party

Request Questions

Please indicate what this request involves (select all that apply) (Required)

- Access or access restriction
- Analytics (e.g. dashboards)
- Case or fileID inquiry
- Charges
- Clery
- Data/report requests
- Feature request(s): General question(s)
- Incident report(s) (e.g., routing rules)
- Letters
- PeopleFinder IR feature
- Request for training
- Sanctions
- Sightlines
- Student information (SIS data feed)
- User(s) or user accounts (e.g., new users/staff/role changes)
- Other (specify below)

Please provide a thorough description of your request or issue, providing a specific case number, fileID or user name.#, if applicable. Being specific about the issue(s) you are experiencing or the request you have will greatly increase the speed with which we can handle your request(s). If you are requesting a new user account, please provide the new user's name.#, their title, whether they are replacing another staff member, and a user whose access we should replicate (if any). (Required)

Is there any additional information that could be useful to include with your request?

Requested due date (subject to current project load) (Required)

mm/dd/yyyy

Have you notified and/or consulted with your department's designated user(s) of this issue or request before submitting this form? (Required)

- Yes
- No

Supporting Documentation

You may upload additional documentation, images and/or screenshots for added detail here. This could include: new/revised staff rosters or letter templates. 5GB maximum total size.

Attachments require time to upload, so please be patient after submitting this form.

Choose files to upload	Choose Files
------------------------	---------------------

Email me a copy of this report

Submit



THE OHIO STATE UNIVERSITY

Maxient Data Confidentiality and User Agreement

Completing and submitting this agreement indicates that you understand and accept responsibility for your actions in the performance of your responsibilities, which includes access to Maxient and Maxient records. Your form submission signifies that you are obligated to maintain the privacy of all data in accordance with university policies and procedures and you have read and understand this agreement in its entirety.

Please direct questions to the Senior Analyst:

Cortney Brewer

Senior Analyst

Office of Student Life - Student Conduct

brewer.412@osu.edu  (<mailto:brewer.412@osu.edu>)

You are currently authenticated as Cortney Brewer (she/her). [Not you?](#) 

(https://cm.maxient.com/reportingform.php?OhioStateUniv&layout_id=12&logout=true).

Your full name:

Your position/title:

Your OSU email address:

Your Department (Required):

If Other, indicate what office:

As a Maxient user, you have an obligation to protect any and all confidential and/or sensitive information that you obtain through the Maxient database. As a user, you affirm that you have reviewed the Institutional Data Policy (IDP) and have completed any and all required IDP training (to be completed annually). By submitting this agreement, you understand and agree to the following:

1. I recognize that I have access to confidential records through Maxient.
2. I understand the applicable legal and university policy requirements related to records maintained in Maxient.
3. I will not share my individual login and password or allow others to access records using my account. I am responsible for storing and using my individual login and password in a secure manner.
4. I will not perform or permit unauthorized use of, or access to, any information or records maintained, stored or managed through Maxient.
5. I will not use email ingestion to upload personal health information (PHI) to the system.
6. I will not knowingly include false, inaccurate or misleading information in any report or record.

7. I will not delete any case record or subsequent report of data entry except in accordance with written guidelines issued by the Senior Analyst. Rationale of the removal of any case-related material should be documented in the General Notes of the case.

8. I understand that if I violate this agreement, I could be subject to corrective action, up to and including termination of my employment.

9. I will in no way discuss, copy, share or use the information in any other manner outside of the scope of my job responsibilities.

10. I understand that the Maxient database provides the system administrator with an audit trail option regarding each action a user performs within the system.

11. I understand that if an audit trail reveals unauthorized or inappropriate use of the system, my access will be immediately revoked and my supervisor will be informed of the agreement violation.

12. All student employees are expected and obligated to uphold the Code of Student Conduct.

13. I understand that any knowledge of a violation of this confidentiality agreement must be reported to the Senior Analyst immediately.

Please select below to indicate review and agreement with the expectations listed above (Required)

I understand and agree

Email me a copy of this report

Submit

<https://studentconduct.osu.edu/maxient-resources>

Maxient System Analyst

Job Description

Student Conduct seeks an experienced Maxient user to serve as the university's Maxient System Analyst. This position is responsible for the security and functionality of the Maxient case management system and will provide oversight over and training for all Maxient user groups across multiple departments within and outside of Student Life and on all university campuses. This position will also provide case documentation and organizational support to the Consultation and Assessment Team, a group that consults with Ohio State faculty and staff about student behavior that is potentially dangerous to others or presents a significant disruption to university activities and instruction. The Maxient System Analyst will review Clery data for reports directly managed by Student Conduct and represent the office as its Clery liaison to the university's Clery Coordinator.

Job Duties

- Student Conduct seeks an experienced Maxient user to serve as Student Conduct's Maxient System Analyst.
- This position is responsible for the security and functionality of the Maxient case management system and will provide oversight over and training for all Maxient user groups across multiple departments within and outside of Student Life and on all university campuses.
- This position will also provide case documentation and organizational support to the Consultation and Assessment Team, a group that consults with Ohio State faculty and staff or students who are concerned about student behavior that is potentially dangerous to others or presents a significant disruption to university activities and instruction.
- The Maxient System Analyst will review Clery data for reports directly managed by Student Conduct and represent Student Conduct as its Clery liaison to the university's Clery Coordinator.
- Manages the administration of the Maxient case management system to ensure its secure use according to the requirements of the university's institutional data policy
- Acts as the single administrator responsible for creating and deleting new user accounts
- Develops and performs regular reviews and audits of user accounts, access levels, and group access permissions

- Develops, tests and implements new system uses, including the creation of incident reports, letters, forms, sanctions, charges and analytics
- Reviews Maxient records for compliance with university records retention policies, including the design and implementation of case deletion schedules
- Serves as the lead contact to log and track system problems through resolution with the vendor.
- Designs in collaboration with Maxient user groups and delivers training to Maxient users in Columbus and at the regional campuses
- Leads regular meetings with Maxient user group liaisons for the purposes of improving system use, efficiency, collaboration, operation, security and the overall user experience.
- Attends meetings and acts as the record-keeper for Student Life's Consultation and Assessment Team (CAT) by creating new Maxient cases, uploading documentation, recording meeting decisions and action plans, and monitoring action plan steps through completion.
- Creates and reviews Student Conduct monthly Clery tag reports
- Notifies hearing officers regarding missing tags; creates reports to deliver Clery data to the university's Clery coordinator
- Other duties as assigned; including providing case management support when necessary for complex investigations or during times of increased caseload in Student Conduct.

Minimum Education Required

Bachelor's Level Degree or equivalent combination of education and experience

Qualifications:

Required

Bachelors degree or equivalent combination of education/experience; Minimum of 2 years of work experience in higher education or student affairs; Maxient system experience or other electronic case management system experience; At least one year of experience designing and creating learning and training content Proficiency with Microsoft Office Suite to compose correspondence, create spreadsheets and prepare presentations (Word, Excel, PowerPoint); Must be able to communicate effectively in writing and proofread documents;

Desired

Masters degree in Higher Education Administration, College Student Personnel, Communications, Computer Science, Data Analytics, Business, Emergency Management or other relevant fields; Professional work experience in student conduct or judicial affairs; Experience with Maxient system as a level 5 user; Experience with basic HTML and SQL coding; At least one year of experience designing and creating online learning and assessment content; Experience with data visualization best practices; Experience complying with the requirements of the Clery Act; Training facilitation experience

Job Category

Business Planning and Operations / Reporting and Analytics

Job Classifications

15-2051 - Data Scientists (US Standard Occupational Classifications (SOC))

Senior Analyst

Job Description:

The Maxient Senior Analyst is the primary owner/authority over Maxient, a case management system used by several offices and departments, including Student Conduct, Housing and Residence Education, the Office of Institutional Equity and the Chief Conduct Offices on the regional campuses. The Senior Analyst must have in-depth knowledge of and experience with Maxient and other related technologies. The Senior Analyst is responsible for the security and functionality of the Maxient case management system and provides oversight over and training for all Maxient user groups across multiple departments within and outside of the Office of Student Life and on all university campuses. Accordingly, the Senior Analyst will develop a thorough understanding of multiple university processes and policies. The Senior Analyst will work on complex projects both independently and on cross-functional teams.

The Senior Analyst supports the Consultation and Assessment Team, a group that consults with Ohio State faculty and staff about student behavior that is potentially dangerous to others or presents a significant disruption to university activities and instruction. Working independently and also as part of the Student Conduct team with the Dean of Students, the Senior analyst:

- has primary control over CAT records
- organizes and disseminates CAT and other highly sensitive information
- ensures compliance with all applicable laws and policies related to that information
- creates and provide ongoing Maxient training to all CAT Team Members on every campus
- creates and maintains an incident reporting system for use on all campuses for students of concern
- maintains a thorough understanding of behavioral intervention team concepts and principals and connects CAT's function and purpose to the technical capabilities of Maxient

The Senior Analyst will review Clery data for reports directly managed by Student Conduct and represent the office as its Clery liaison to the university's Clery Coordinator. This requires a thorough understanding of CLERY reporting requirements and applicable university processes and policies. In this capacity, the Senior Analyst works independently to create systems of review and control for Clery reporting in Student Conduct.

Responsibilities:

- 35% - Manages the administration of the Maxient case management system to ensure its secure use according to the requirements of the university's institutional data policy; acts as the single administrator responsible for creating and deleting new user accounts; develops and performs regular reviews and audits of user accounts, access levels, and group access permissions; develops, tests and implements new system uses, including the creation of incident reports, letters, forms, sanctions, charges and analytics; reviews Maxient records for compliance with university records retention policies, including the design and implementation of case deletion schedules; serves as the lead contact to log and track system problems through resolution with the vendor. Designs in collaboration with Maxient user groups and delivers training to Maxient users in Columbus and at the

regional campuses; leads regular meetings with Maxient user group liaisons for the purposes of improving system use, efficiency, collaboration, operation, security and the overall user experience.

- 45% - Has primary control over all CAT case management records and attends meetings and acts as the record-keeper for CAT by creating new Maxient cases, uploading documentation, recording meeting decisions and action plans, and monitoring action plan steps through completion; reviews and responds to incident reports submitted by staff/faculty on all Ohio State campuses; trains university staff on all campuses to use Maxient and Microsoft Teams to create and maintain CAT records; ensures compliance with all applicable laws and policies related to CAT records; develops and maintains a thorough understanding of behavioral intervention team concepts and principals and connects CAT's function and purpose to the technical capabilities of Maxient
- 10% - Creates and reviews Student Conduct monthly Clery tag reports; notifies hearing officers regarding missing tags; creates reports to deliver Clery data to the university's Clery coordinator.
- 10% - Other duties as assigned; including providing case management support when necessary for complex investigations in Student Conduct

Minimum Education Required

Bachelor's Level Degree or equivalent combination of education and experience

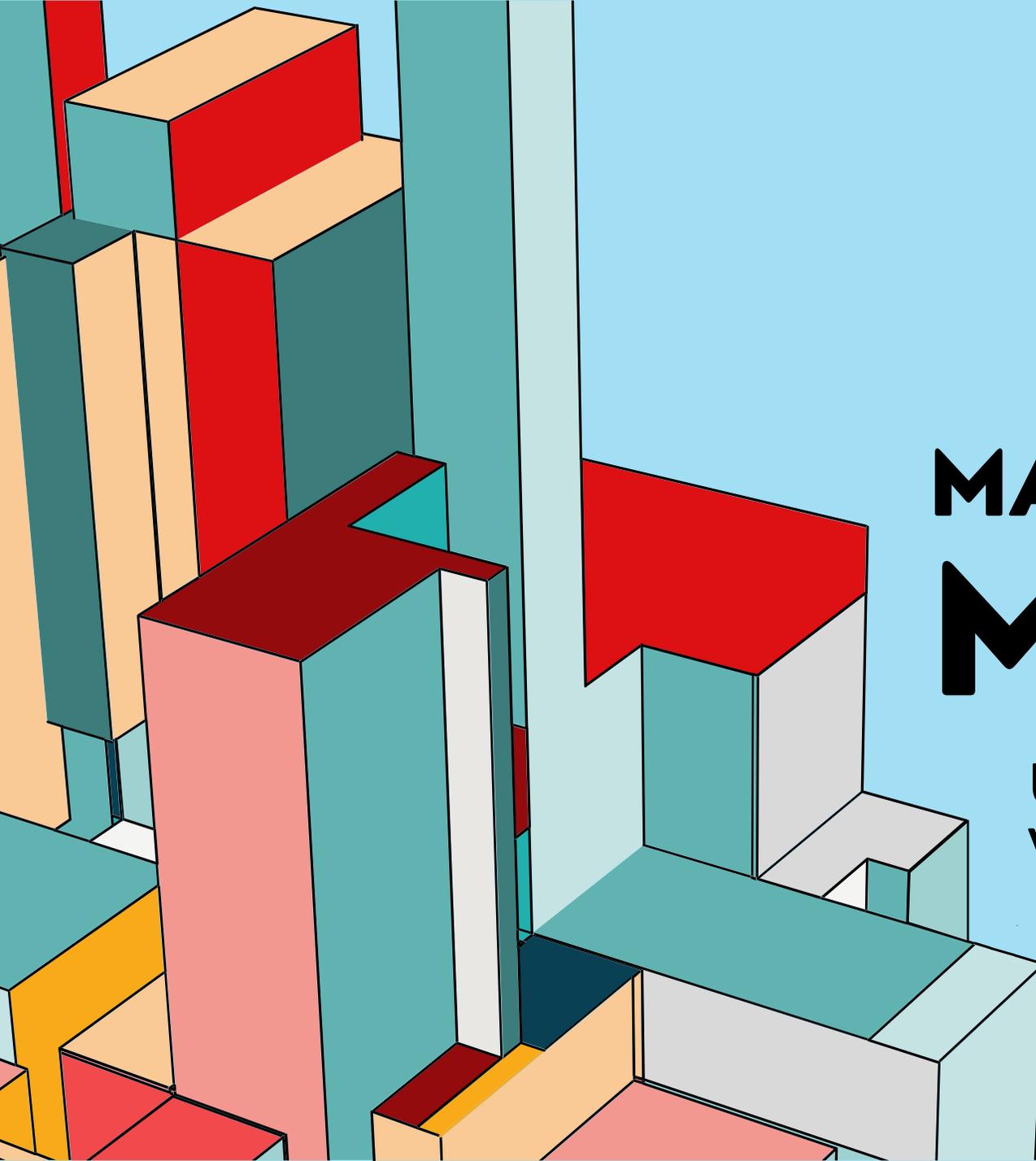
Additional Education Desired

Master's Level Degree or equivalent combination of education and experience

Qualifications

Required: Bachelor's degree in Higher Education Administration, College Student Personnel, Communications, Computer Science, Data Analytics, Business, Emergency Management or other relevant fields; 4 years of work experience in higher education or student affairs; Maxient system experience or other electronic case management system experience; at least two years of experience designing and creating learning and training content Proficiency with Microsoft Office Suite to compose correspondence, create spreadsheets and prepare presentations (Word, Excel, PowerPoint); demonstrated ability to communicate effectively in writing and proofread documents.

Desired: Master's degree in Higher Education Administration, College Student Personnel, Communications, Computer Science, Data Analytics, Business, Emergency Management or other relevant fields; 4-8 years of work experience in higher education or student affairs; professional work experience serving on or supporting a behavioral intervention team; experience with Maxient system as a level 5 user; experience with basic HTML and SQL coding; at least two years of experience designing, creating and delivering training materials for professional staff; creating online learning and assessment content; Experience with data visualization best practices; Experience complying with the requirements of the Clery Act



MAPPING MAXIENT

Using Case Records to Build New
Ways Of Looking at Campus Life

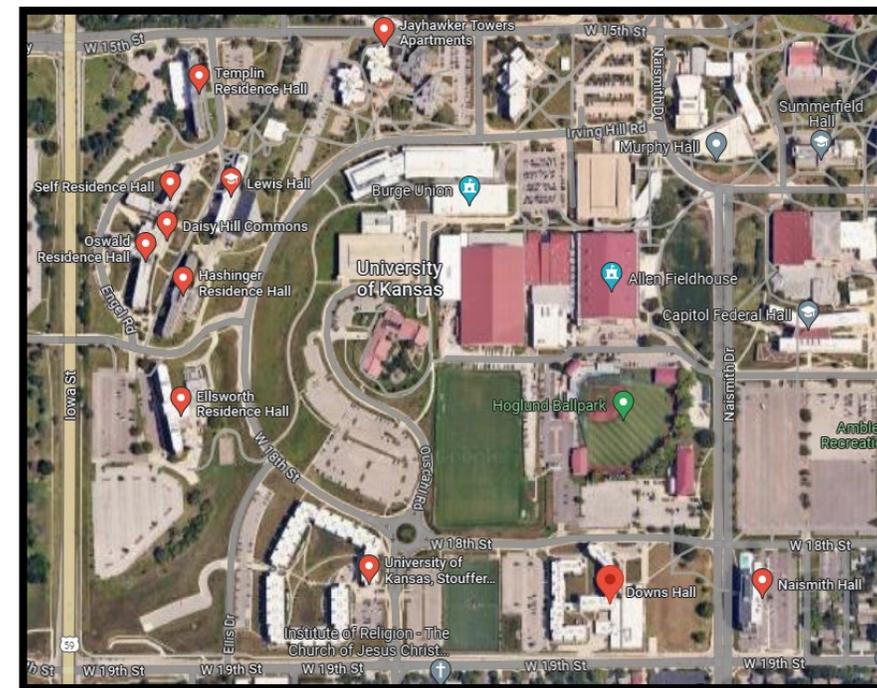
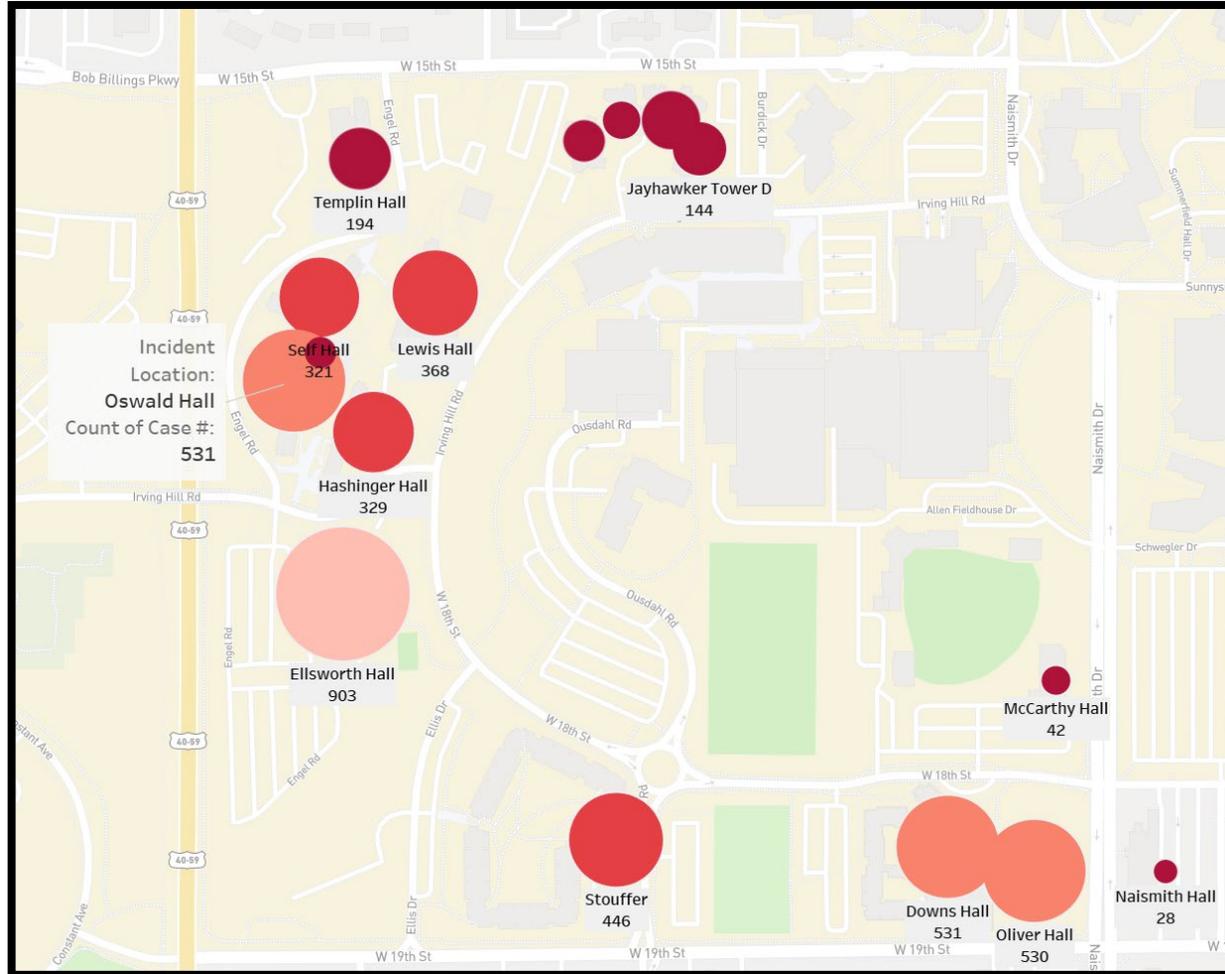


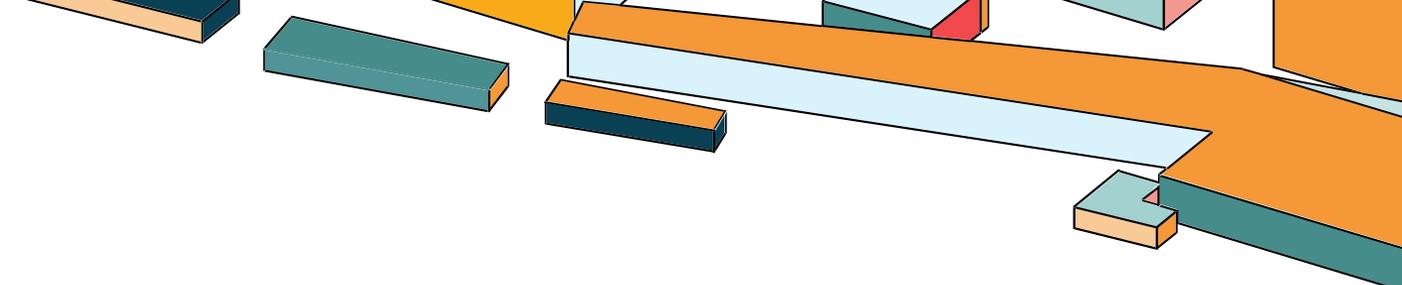
Emily Lowrance-Floyd
Functional Systems Analyst
Office for Student Affairs
The University of Kansas



THE UNIVERSITY OF KANSAS
Student Affairs

COOL HEAT MAP



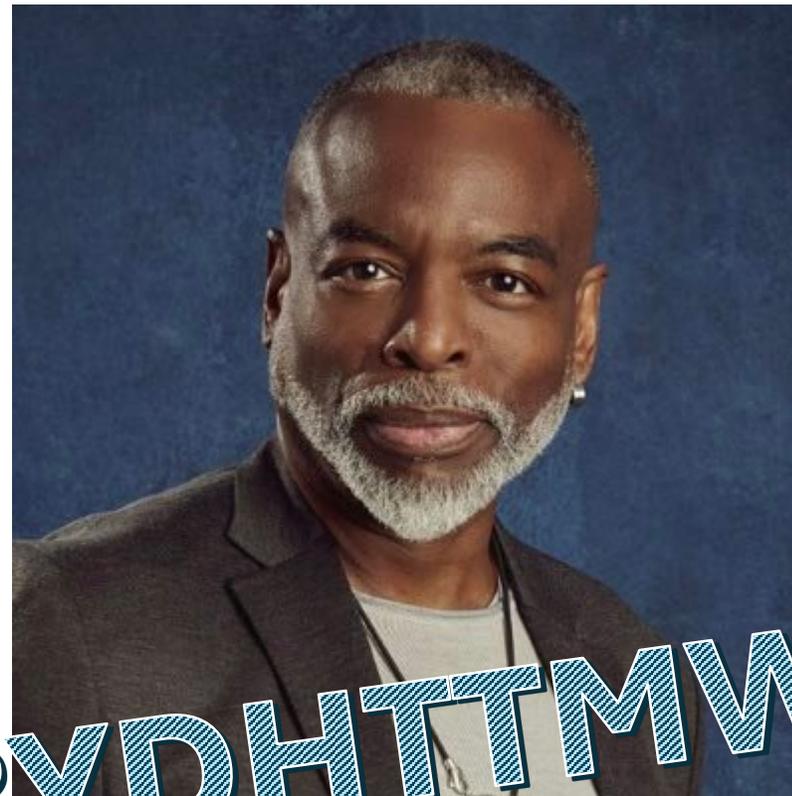


NERD ALERT!

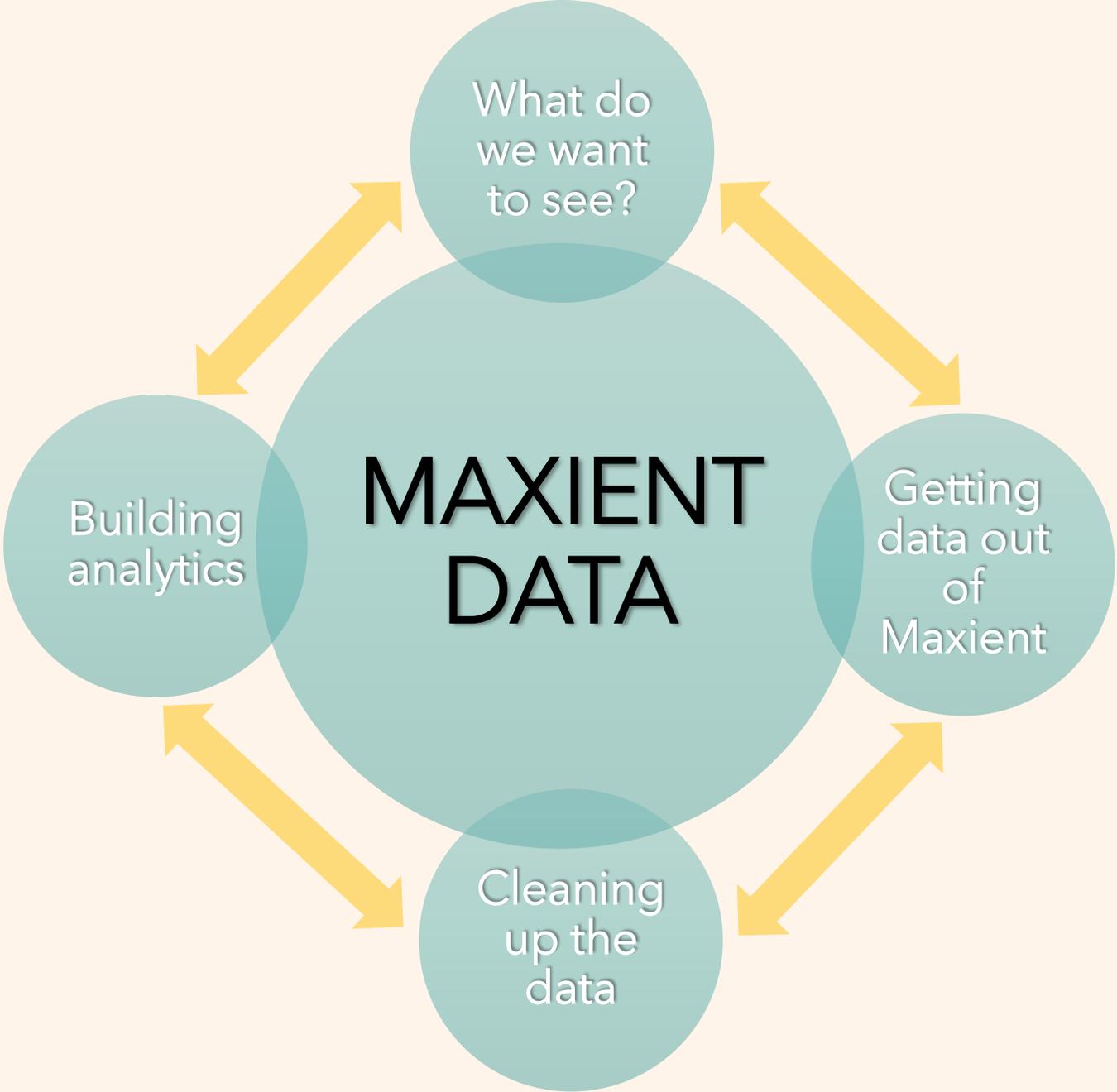
- There's gonna be data...
 - And Excel. Lots of Excel.
 - ArcGIS - geographic information system
 - Tableau - visual analytics platform
- 

HOW-TO RESOURCES

- Google, Bing, DuckDuckGo, YouTube, or your search engine of choice
- LinkedIn Learning
- Your local public or university library system!



#BYDHTTMWFI



UPCOMING MAXFEST SESSIONS ON ANALYTICS

- Later today

Wednesday, June 26

Session I: 1:30 pm – 2:45 pm

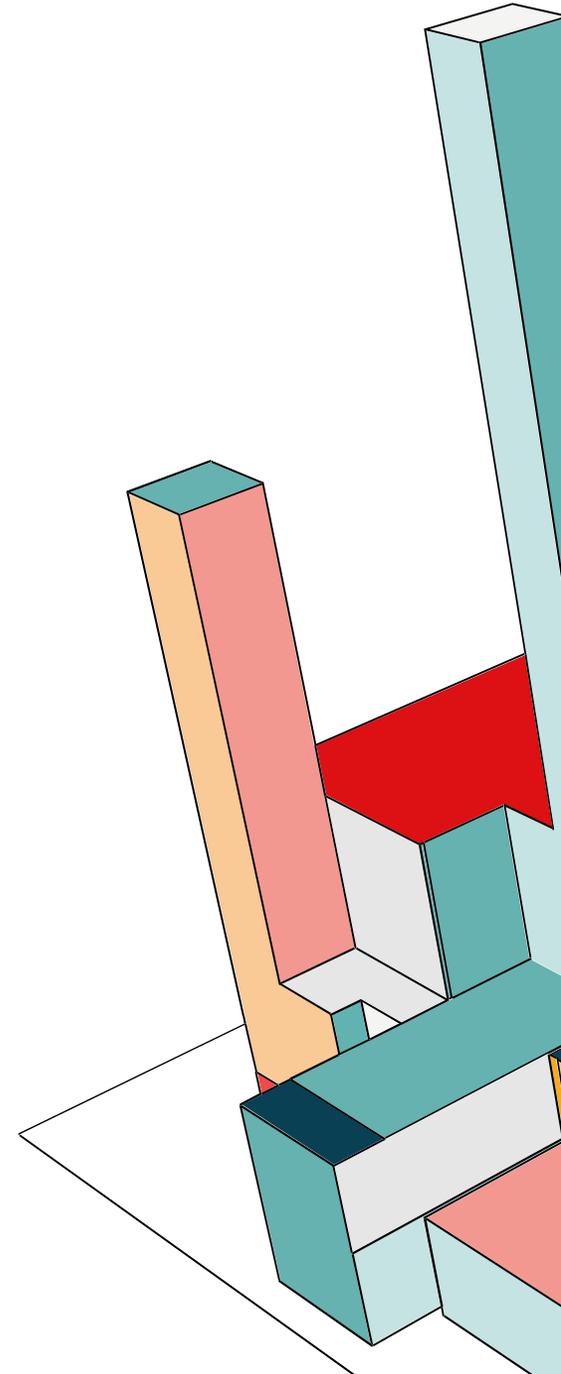
A How-to Guide on Writing Custom Reports

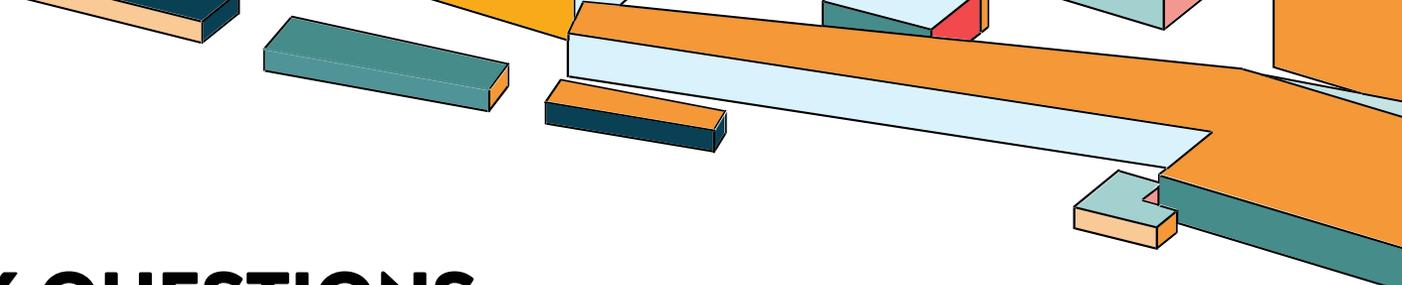
- Tomorrow

Thursday, June 27

Session K: 8:30 am - 9:45 am

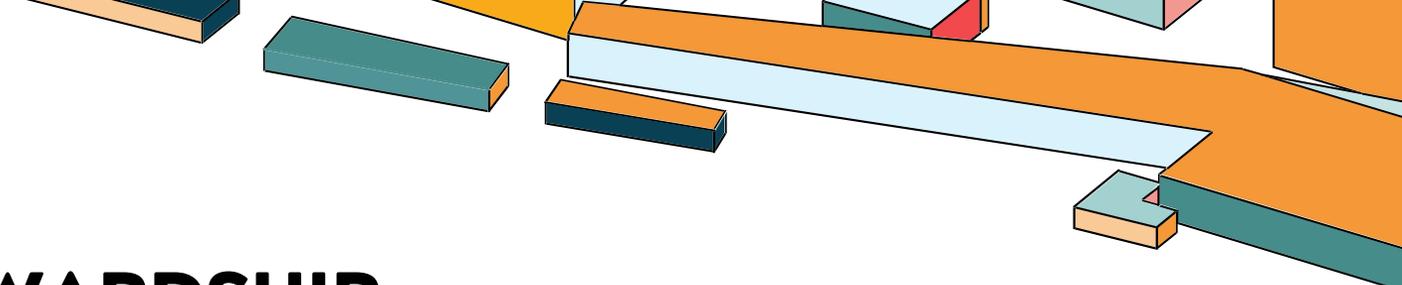
The Finest Reports and Analytics in All the Land





GET READY, GET SET, ASK QUESTIONS

- Which case type to start with?
 - Cases with alcohol and vandalism charges
 - Timeframe: all cases
 - How to slice and dice?
 - Build an exploratory analytic to provide multiple perspectives
- 

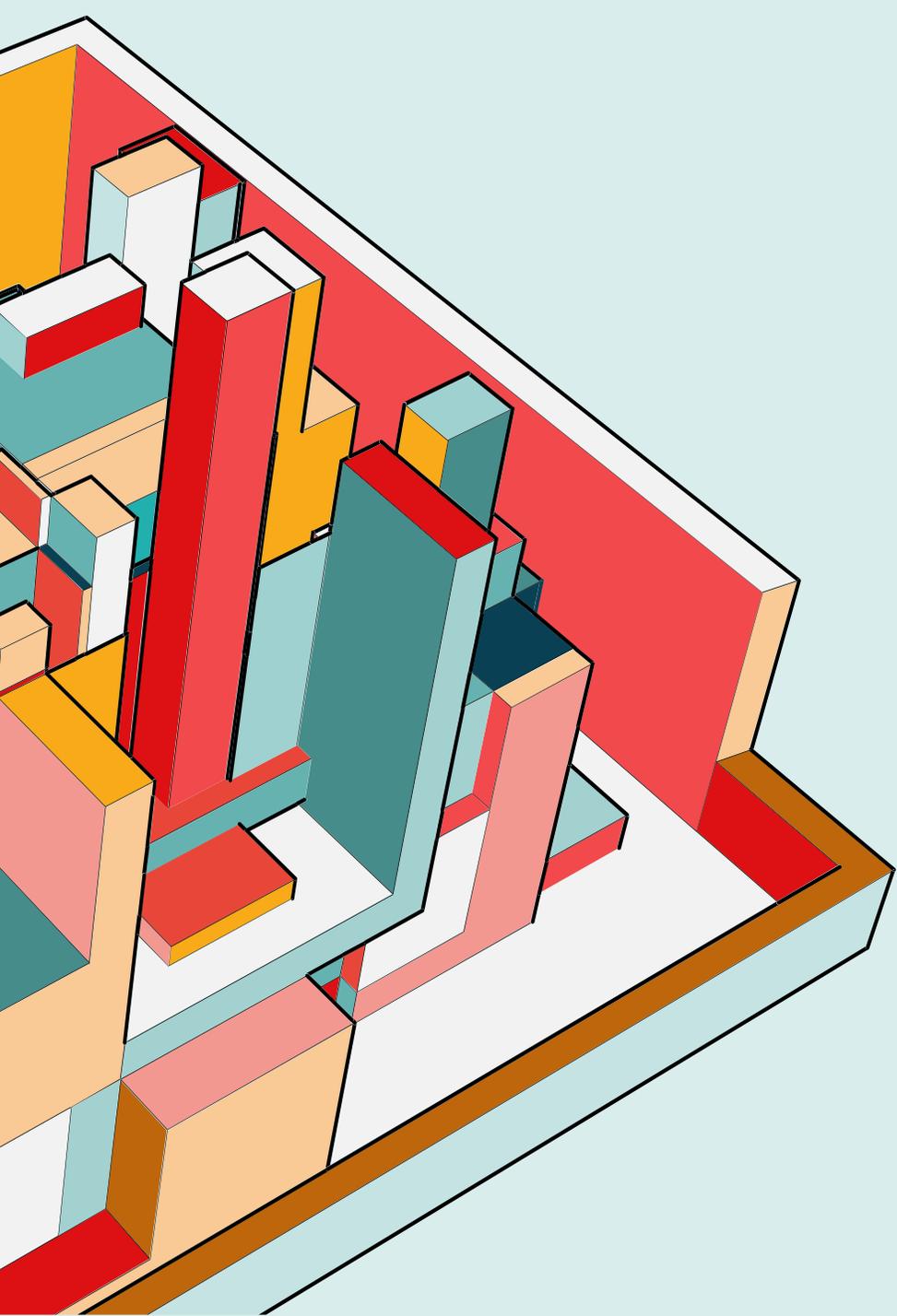


DATA PRIVACY AND STEWARDSHIP

- Omit all personally identifiable information (PII)
- Name, address, student IDs
- First step with pre-coded analytics: remove any PII

We  **FERPA!**





BUILDING OUR EXCEL DASHBOARD

Adventures in pivot charts

PITFALLS

- Test cases - BEWARE THOSE WHO TEST WITH FAKE ACCOUNTS
- Same things, different names - Stouffer & Stouffer Apartments

I  **IR Layout Field Values report #903!**

PITFALLS

- Test cases - BEWARE THOSE WHO TEST WITH FAKE ACCOUNTS
- Same things, different names - Stouffer & Stouffer Apartments
- Maxient reporting quirks - dates, numbers, time format

QUICK DEMO OF REPORT #25



University of Kansas
Case Manager

Thursday June 20, 2024

- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find People
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Logs

Analytics

Pre-coded Analytics

Choose your report

25 - Demographics by Role

Choose a date range or provide one

Year-to-date

Choose the date of reference

Incident Date Hearing Date Case Created Date Reported Date

Limit results to the following case types

Housing-Conduct

VPSA-Conduct

Limit results to the following home office values

[Click here to select one or more offices ...](#)

Run this report



QUICK DEMO OF REPORT #25



- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find People
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Logs



LEGEND: Displays counts of various demographics by role in the case, during the specified date range. The "File IDs with Associated Demographic Information" table is access restriction aware, while the other tables are not. This means that the number of files displayed on that table may differ from the counts in the other tables based upon the cases to which you have access.

- Role by Ethnicity
- Role by Gender
- Role by Classification
- Role by Athletic Affiliation
- Role by Greek Affiliation
- Role by ROTC/Veteran Affiliation
- Role by Honors Affiliation
- Role by Age at Incident

File IDs with Associated Demographic Information

DESCRIPTION: Role and Ethnicity
DATES: CASE CREATED DATE between January 1, 2024 and June 20, 2024
CASE TYPES: Housing-Conduct or VPSA-Conduct
HOME OFFICES: All
RESTRICTIONS: This report ignores case access restrictions.

- CSV
- Excel
- Filter Results
- Column visibility

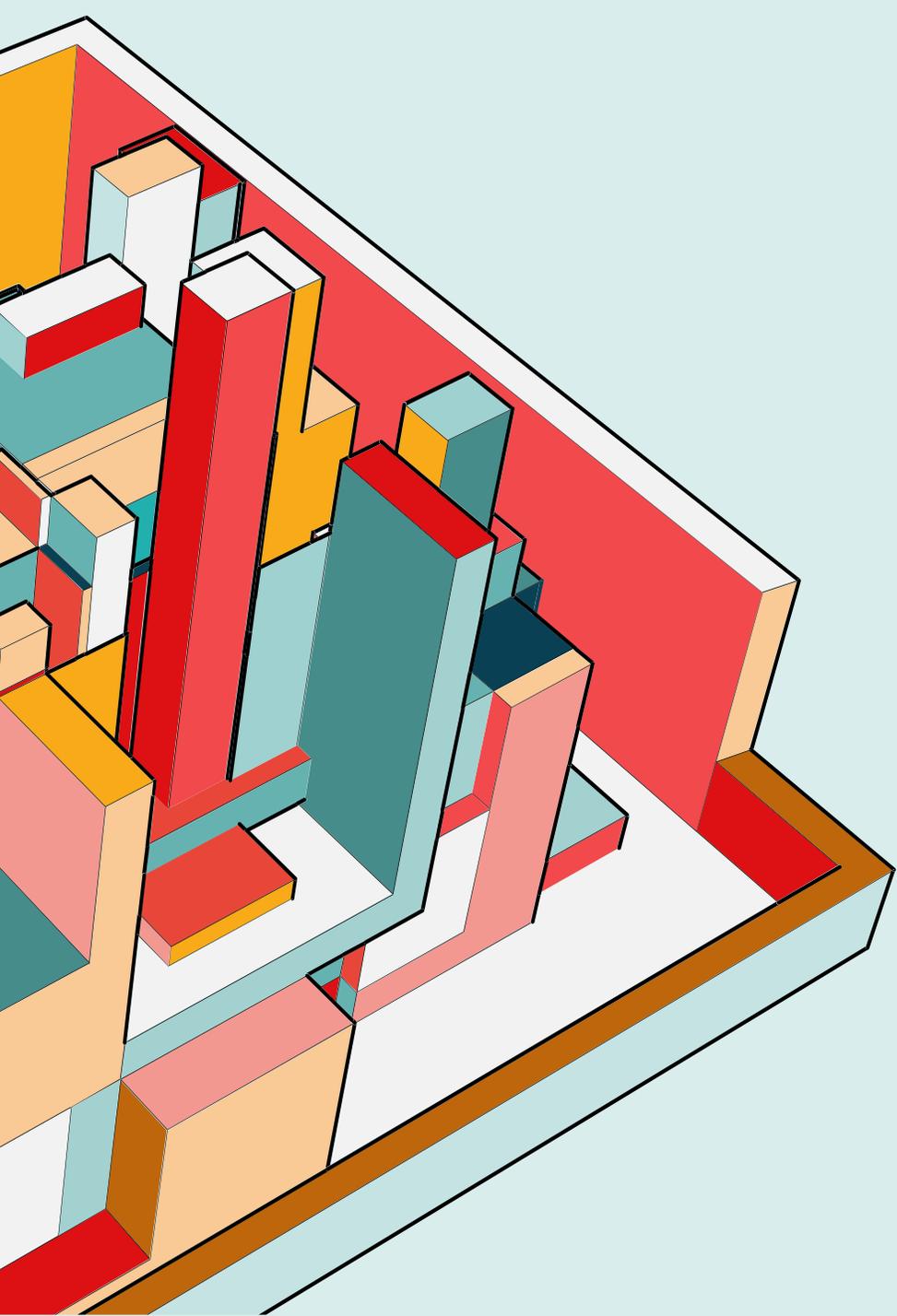
Showing 1 to 9 of 9 entries

Search:

Ethnicity	Student of Concern	Subject/Respondent	Unknown/Other	Victim/Complainant	Witness	Total
Blank on Case	0	0	0	0	0	0
American Indian/Alaska Native	0	0	0	0	0	0
Asian	0	0	0	0	0	0
Black/African American	0	0	0	0	0	0
Hispanic/Latino	0	0	0	0	0	0
Native Hawaiian/Other Pacific	0	0	0	0	0	0
Not Hispanic	0	0	0	0	0	0
Not Specified	0	0	0	0	0	0
White	0	0	0	0	0	0
TOTALS	0	0	0	0	0	0

Showing 1 to 9 of 9 entries





BUILDING OUR TABLEAU DASHBOARDS

Adventures in geocoding!

REPORT #7 – CASE TURNAROUND ANALYSIS



University of Kansas
Case Manager

Thursday June 20, 2024

- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find People
- Letters
- Analytics
- Administrative**
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Logs

Analytics

Pre-coded Analytics

Choose your report

7 - Case Turnaround Analysis

Choose a date range or provide one

Year-to-date

Choose the date of reference

Incident Date Hearing Date Case Created Date Reported Date

Limit results to the following case types

Housing-Conduct

VPSA-Conduct

Limit results to the following home office values

[Click here to select one or more offices ...](#)

Run this report

REPORT #7 – CASE TURNAROUND ANALYSIS



- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find People
- Letters
- Analytics
- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration
- Logs

LEGEND: Report displays two tables. The first displays the number of calendar days from various dates of reference for each case where that case has a **hearing/resolution date**. The "Date Closed (From Audit Trail)" column displays the most recent date from the audit trail where the status was set to the closed status (which is defined by the "Statuses - Term for Closed" field in "Configuration"). A "Yes" in the "CRF Used" column indicates that the case has a hearing/resolution date *and* a CRF exists in the Electronic File Cabinet. The second table displays the average number of calendar days from the various dates of reference.

This query can become unwieldy when run for large spans of time.

Note: This report makes use of access restrictions, meaning that if a user is not a member of the group to which a case is restricted, that user will not see that case on this report when viewing it.

Case Turnaround Analysis Averages

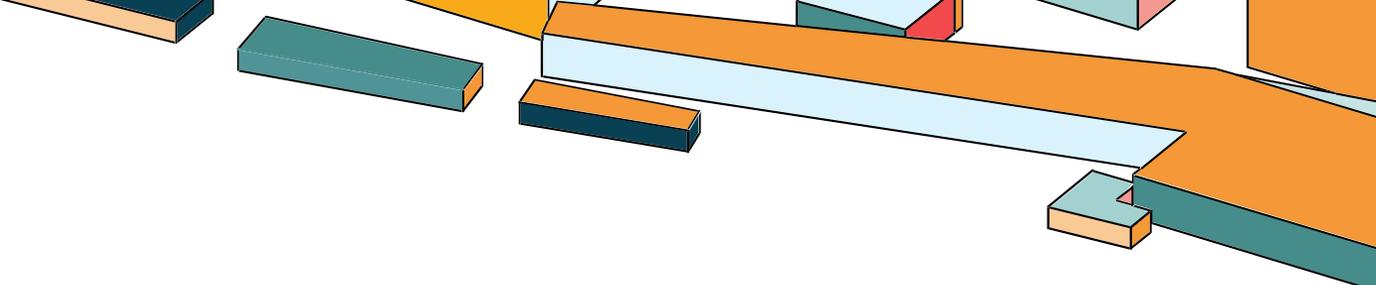
DESCRIPTION: Case Turnaround Analysis
DATES: CASE CREATED DATE between January 1, 2024 and June 20, 2024
CASE TYPES: Housing-Conduct or VPSA-Conduct
HOME OFFICES: All
RESULTS: 573
RESTRICTIONS: This report respects cases access restrictions. Therefore, you may see more or less here than other users, depending on your individual access to the component cases.

CSV Excel Filter Results Column visibility ▾

Showing 1 to 573 of 573 entries

Search:

File ID	Case Type	Status	Name	Assigned To	Assigned To - Name	Home Office	Incident Date	Reported Date	Case Created Date	Hearing/Resolution Date	Hearing Type	CRF Used	Date Closed (From Audit Trail)	Days - Incident to Report	Days - Incident to Case Creation	Days - Incident to Adjudication
---------	-----------	--------	------	-------------	--------------------	-------------	---------------	---------------	-------------------	-------------------------	--------------	----------	--------------------------------	---------------------------	----------------------------------	---------------------------------



SO WHAT?

- How to share out?
 - Tableau Server
 - OneDrive or any kind of secure file share
 - The anecdotal vs. the data?
 - Training staff
 - Identifying programming opportunities – “AlcoholEdu”
 - Longitudinal comparisons
- 

CONCLUSION

THOUGHTS?

QUESTIONS?

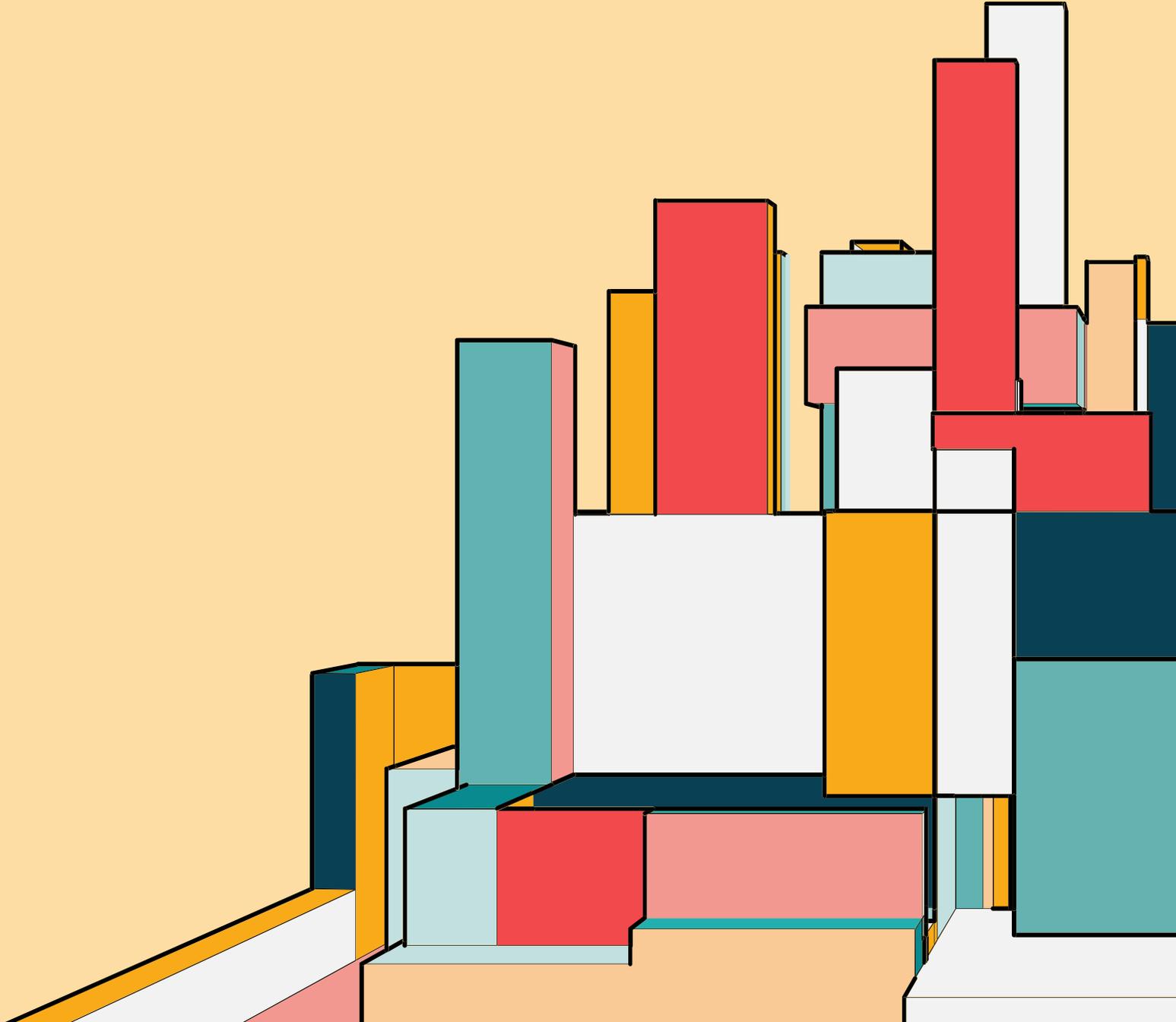


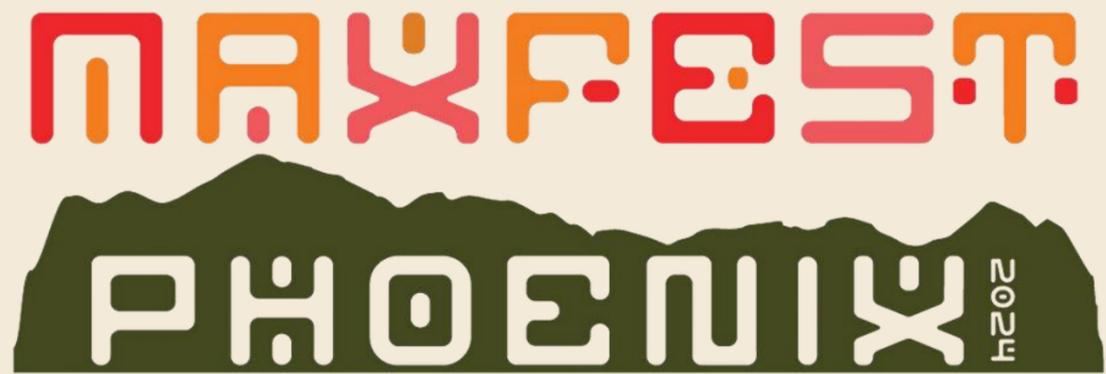
THANK YOU!

Emily Lowrance-Floyd

The University of Kansas

lowrance@ku.edu





Max It Up and Clean It Out: Conducting Your Annual System Review



Ivy Fry
Client Support Specialist



Sarah Koukal
Director of Client Support



AN ORGANIZED SYSTEM IS A HAPPY SYSTEM.

Good info in.
Good info out.

Ongoing
management is
key, so schedule
regular cleanups to
lessen the load.

The 900 Reports

We will mention them along the way today, but here they are:

- 900 -- User Accounts Report
- 901 -- User Account System Health Check
- 902 -- Routing Rules Report for Incident Report (IR) Layouts
- 903 -- IR Layout Field Values
- 904 -- Charges/Issues Accessible by Individual User
- 905 -- Sanction Language Report
- 906 -- Letter Templates Language for Individual User
- 908 -- Analytics Report for Individual User
- 909 -- Saved Custom Queries
- 910 -- Demographic Feed and Configuration Screen Values Crosscheck Report
- 911 -- Clery Locations Crosscheck
- 912 -- Cases with Problematic Dates
- 913 -- Open Cases Not Assigned to a Current User
- 914 -- Hearing Officer Titles in Use
- 915 -- Cases with No Access Restriction
- 916 -- Group Memberships



IR LAYOUTS

IR LAYOUTS

Natures

NATURE / LOCATION / DATE & TIME

NATURE OF REPORT

This is **required**. If only one option is provided, however, the field will be automatically hidden on your form.

Description:

Nature of this report

Help Text:

Choose an option

Options
(separate with
semi-colons):
(Required)

Abuse;
Academic Misconduct;
Alcohol;
Bias;
Bullying;
Cannabis;
Criminal Disclosure;
Comfort Animal;
Computer Misuse;
Coronavirus Non-compliance;
Cyber Bullying;
Damage;
Damage to Property;
Damage/Destruction/Vandalism;
Dating Violence;
Dining Incident;
Dishonesty;

NO

IR LAYOUTS

Natures

NATURE / LOCATION / DATE & TIME

NATURE OF REPORT

This is **required**. If only one option is provided, however, the field will be automatically hidden on your form.

YES!

Description:

Nature of this report

Help Text:

Choose an option

Options
(separate with
semi-colons):
(Required)

General Conduct Report;
Residence Life Report;
Police Report;
Concerning or Threatening Behavior;
Sexual Harassment or Misconduct

IR LAYOUTS

> Urgencies

- > Only use if it makes sense
- > Using only ONE will hide it from your IR layout

> Locations

- > Use Quick Copy for Physical Locations
- > Can be repurposed for some processes

LOCATION OF INCIDENT This is required . If only one option is provided, however, the field will be automatically hidden on your form. Quick copy: Standard incident locations	Description:	College
	Placeholder:	Please select a department...
	Help Text:	
	Options (separate with semi-colons): (Required)	College of Engineering; College of Liberal Arts; College of Science and Mathematics; The C. Montgomery Burns School of Business; College of Mass Communication; College of Hospitality, Retail, & Sport Management; Mr. Wizard's School of Education; School of Music; Law School;

IR LAYOUTS

> Layout Owners

- > If staff turns over, remember to update your layout owners!

LAYOUT OWNER NAME (REQUIRED)

If the reporter chooses to receive an emailed copy, it will appear to come from whatever name (person, office, etc.) you specify here.

Dean So-and-So

LAYOUT OWNER EMAIL (REQUIRED)

If the reporter chooses to receive an emailed copy, it will appear to come from whatever email address you specify here. Please note that if this is not a real email address it may be rejected by many spam filters.

soandso@yourschool.edu

> Routing Rules

- > When you make changes to Nature, Urgency, or Location, don't forget to update your Routing Rules!
- > Try making rules by Hearing Officer Title
- > Duplicate rules break routing!

IR LAYOUTS

902 - Routing Rules Report for Incident Report (IR) Layouts

LEGEND: Report displays the routing rules for each incident report in the system. A bolded email address in the "Copies To" column represents an email address that is not associated with a user found in "Manage users" and where their account is not locked.

Any rule appearing in **red** indicates an option that is not valid based upon your incident reporting form's current content. Invalid entries in the "Recipient" column may be a result, as indicated in the "Manage users" screen, of a username not being found, an incorrect hearing officer title, or if the user account is locked. An entire row appearing in **orange** indicates that row is a duplicate rule (identical nature, location, and urgency options) and thus, invalid. Case Type and Home Office filters will not apply to this report.

DATES: *Appears to be ignored*
CASE TYPES: *Appears to be ignored*
HOME OFFICES: *Appears to be ignored*
RESTRICTIONS: This report respects cases access restrictions.
Therefore, you may see more or less here than other users, depending on your individual access to the component cases.

Layout 100 -- Rules 90, 93 are duplicates.
Layout 100 -- Rules 122, 125 are duplicates.
Layout 100 -- Rules 98, 101 are duplicates.
Layout 100 -- Rules 210, 213 are duplicates.
Layout 998 -- Rules 306, 308 are duplicates.

Layout ID 0 - Incident Reporting Form

Routing rules for layout ID 0 - Incident Reporting Form

Access [Routing Rules Section of Layout 0](#) directly to make edits.

CSV Excel Filter Results Column visibility ▼

Showing 1 to 4 of 4 entries

Search:



CONFIGURATION CLEANUP

CONFIGURATION

- > **Listing Format:**
 - One item;
 - Per line;
 - Separated by semicolons;
 - With no semicolon after the last item
- > Watch out for special characters and spelling errors!

CONFIGURATION

- > **Case Type Subsets** should mimic Case Types
 - > Some analytics work based on these values

CASE TYPES - SUBSET REPRESENTING BIT/CARE

Case type(s) used in this system for managing BIT/CARE. This represents a subset of the more comprehensive listing of all case types above. Use semicolons ONLY to separate entries. No semicolon after last entry.

BIT

CASE TYPES - SUBSET REPRESENTING TITLE IX

Case type(s) used in this system for managing Title IX. This represents a subset of the more comprehensive listing of all case types above. Use semicolons ONLY to separate entries. No semicolon after last entry.

Title IX - Student;
Tile IX - Employee

CONFIGURATION

> **CC Recipients** can be pre-defined for easier selection when sending letters

> Follow the format: Name, Title => Email Address

CC RECIPIENTS

Possible CC recipients. Value to the left of arrow (equal sign and greater than bracket) is displayed in the pull-down menu. Value to the right is the associated email address. Separate with semicolons. Comma use okay.

```
Dean Athena, Director of Greek Life => athena@maxient.com;  
Dr. Phil McGraw, Director of Counseling Center => drphil@maxient.com;  
Michael Jordan, Director of Athletics => jkistler@maxient.com;  
Mr. T, Director of Security => mrT@maxient.com;  
O.M. Hubbard, Director of Residence Life => hubbard@maxient.com;  
Mark Twain, Central Campus Area Director => mtwain@maxient.com;  
Bill Gates, Registrar => bgates@maxient.com;  
Behavior Team =>  
hubbard@maxient.com,jkrowling@maxient.com,mrT@maxient.com;
```

CC RECIPIENTS - ALLOW USERS TO SPECIFY

If yes, end users will be able to override the CC dropdown menu and enter additional persons and email addresses on a per-letter basis.

Yes No

CONFIGURATION

- > **Clery Associated Charges**
 - > Review annually
 - > **Add** to this box, **never delete** from it
 - > Add your **charges**, **NOT** the **Clery Categories**
- > **Clery Associated Incident Locations**
 - > Review annually
 - > Analytic 911

CONFIGURATION

- > **Hearing Officer Titles**
 - > If you change a user's HOT, their cases remain with the old HOT (unless you move them or ask us to move them!)
 - Director of Student Conduct \neq Dir. Of Student Conduct
 - > HOTs should pass from one person to the next
 - > Deleting a user makes the HOT available for the next person
 - > Don't keep old HOTs on Configuration

CONFIGURATION



Roles

- > Role Subsets should mimic existing Roles
Some analytics work based on these values!

ROLES - TERM FOR ALLEGED

Role(s) used by this school to identify the respondent. Use semicolons ONLY to separate entries. No semicolon after last entry.

Alleged;
Responding Party;
Respondent;
Object of Complaint

ROLES - TERM FOR COMPLAINANT

Role(s) used by this school to identify the complainant. Use semicolons ONLY to separate entries. No semicolon after last entry.

Complaining Party;
Requester;
Victim/Survivor;
Complainant

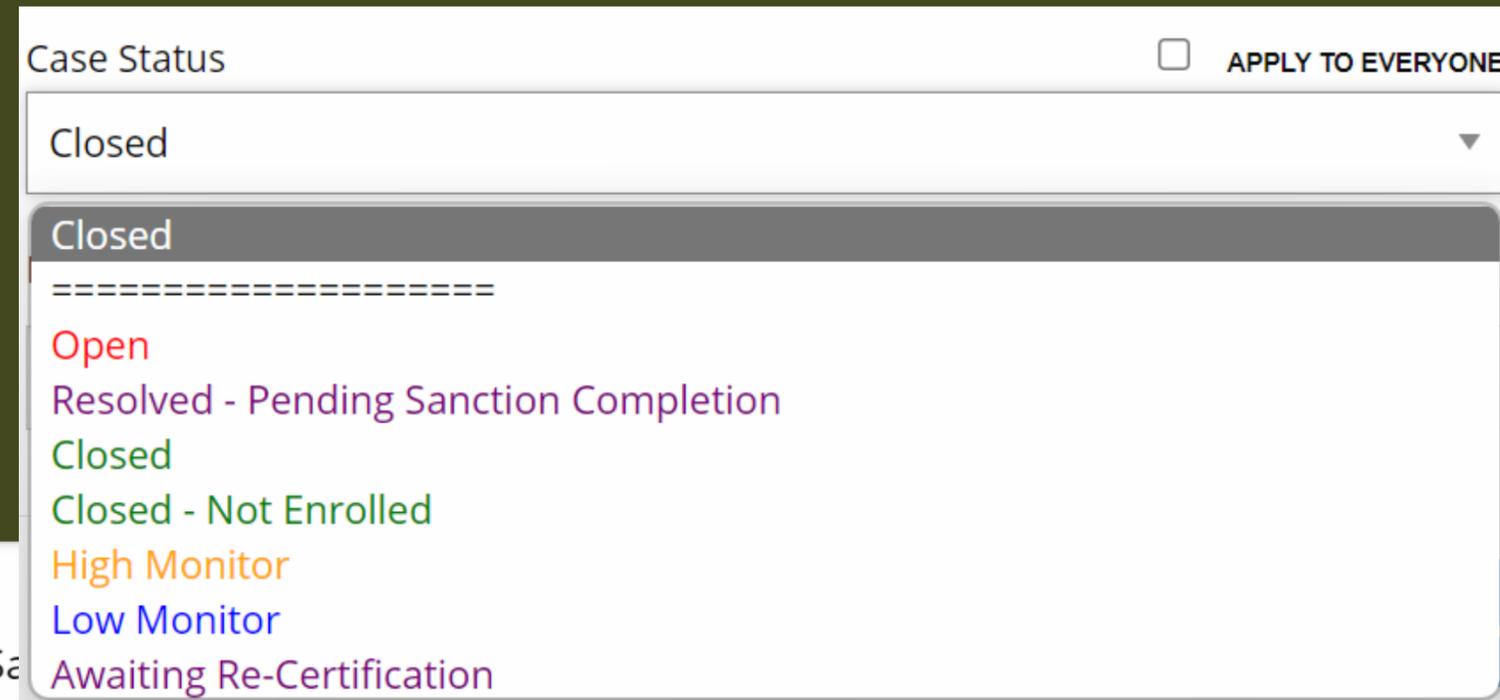
CONFIGURATION

> Statuses

> The same status can be used across various processes

> Status – Term for Closed

> Causes cases at that status to not appear on your homescreen



Open => red;
Resolved - Pending Sa
Closed => #DC143C;
Closed - Not Enrolled => #DC143C;
High Monitor => #FF8C00;
Low Monitor => #483D8B;
Awaiting Re-Certification => purple

STATUSES
Case statuses and coordinating colors. Separate with a semicolon. No semicolon after last entry. Comma use okay.

CONFIGURATION

- > **Title IX Associated Charges**
 - > Charge titles should match exactly
 - > Do not remove charges! Just add them.

TITLE IX ASSOCIATED CHARGES/ISSUES

List of charges/issues in your system that, when present in a case, may indicate relevance for review with respect to Title IX.

Abuse - (Physical);
Dating Violence;
Domestic Violence;
Harassment;
Hazing;
Legal;
Prohibited Sexual Contact;
Sexual Harassment;
Sexual Misconduct;
Stalking

Edit	Title IX	Dating Violence
Edit	Title IX	Domestic Violence
Edit	Title IX	Gender-based Harassment or Discrimination
Edit	Title IX	Intimate Partner Violence
Edit	Title IX	Rape
Edit	Title IX	Retaliation
Edit	Title IX	Sex Discrimination
Edit	Title IX	Sex-based Misconduct
Edit	Title IX	Sexual Abuse
Edit	Title IX	Sexual Assault
Edit	Title IX	Sexual Exploitation
Edit	Title IX	Sexual Harassment



MANAGE CASE TYPES

MANAGE CASE TYPES



Manage case types

MANAGE CASE TYPES

> Case Types

Don't:

- > Be too specific
- > Mimic your charges/issues
- > Be too wordy

MANAGE CASE TYPES

CASE TYPES

List of case types. Use semicolons ONLY to separate entries. No semicolon after the last entry.

NO

Abuse;
Academic Misconduct;
Alcohol;
Bias;
Bullying;
Cannabis;
Criminal Disclosure;
Comfort Animal;
Computer Misuse;
Coronavirus Non-compliance;
Cyber Bullying;
Damage;
Damage to Property;
Damage/Destruction/Vandalism;
Dating Violence;
Destruction;
Dinning Incident;
Dishonesty;
Disruption;
Domestic Violence;
Drugs;
Fire Alarm Report;
Fire Safety;
Fraud;
Gender-Based Harassment;
General Non-Academic;
Guest Registration Violation;
Guest Violation;
Harassment;
Hazing;
Housing Policy;



MANAGE CASE TYPES

CASE TYPES

List of case types. Use semicolons ONLY to separate entries. No semicolon after the last entry.

YAS!

Academic Integrity;
BIT;
Case Management;
BIRT;
Complaint;
Early Alert;
Disability Services;
Employee Relations;
Mediation;
Records Request;
Student Conduct;
Title IX - Student;
Tile IX - Employee;
Victim Advocate

MANAGE CASE TYPES

- Incoming Reports
- Create New Case
- Complete CRF
- Update Existing Case
- Find Case
- Find People
- Letters
- Analytics
- Administrative
- Manage case types
- Manage users
- Manage groups
- Manage charges

Manage Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

Default Settings ▼

- Default Settings
- Aaron's Test
- Academic Integrity
- Behavior Team
- Crisis Management
- Disability Services
- Employee Relations

Go

ntended solely for the individual or entity who has accessed it for official purposes and by lawful means. Any dissemination, this communication in error, please immediately notify us by telephone at (434) 295-1748, and return the original message to us ville, VA 22903, without retaining a copy.

MANAGE CASE TYPES

> Findings

- > A finding is the disposition of a charge/issue that is assigned to the party(ies) involved in a case

Default Settings

Values highlighted in green indicate they have been modified from the default values.

Terminology Lists Fields to Hide or Repurpose

Standard Terminology	Customized Name
Charge <i>30 character limit</i>	Charge / Issue
Finding <i>30 character limit</i>	Finding
Hearing Officer <i>30 character limit</i>	Administrator

MANAGE CASE TYPES

> Findings

Item	Available Options
Appeal Statuses <i>20 character limit per option</i>	No appeal filed; Appeal received;
Classifications <i>30 character limit per option</i>	Freshman; Sophomore;
Deadline Offset Default	14
Findings <i>30 character limit per option</i>	Responsible; Not Responsible; FYI

MANAGE CASE TYPES

> Adding Group Values for Clarity:
=====WORDS GO HERE=====;

Incident Locations

100 character limit per option

```
=====ON-CAMPUS LOCATIONS=====;
Student Union;
Library;
Stadium;
Wellness and Fitness Center;
On campus parking lot or street;
On campus - other;
=====HOUSING LOCATIONS=====;
Breese Hall;
North Quad;
Patterson Hall;
Simmons Tower;
Tucker House;
Williams College;
Capstone House;
=====OFF CAMPUS / OTHER LOCATIONS=====;
Off campus;
```



MANAGE CASE TYPES

> Adding Group Values for Clarity:
=====WORDS GO HERE=====;

Milestones

255 character limit per option

```
=====Student Conduct Use Only=====;
Appeal Received;
Appeal Reviewed;
Appeal Decision Sent to Respondent;
Appeal Decision Sent to Advisor/National Organization;
=====Title IX Use Only=====;
Reported to Official with Authority;
Reported to TIX Coordinator;
Initial Meeting with Complainant;
Formal Complaint Received;
Notice of Investigation Sent;
```

MANAGE CASE TYPES

> Resolution Types

- > Represent resolution/meeting types, **not** progress toward resolution (*use Milestones for that!*)

Resolution Types

50 character limit per option

Informal Administrative Hearing;
Formal Administrative Hearing;
Residence Hall Conduct Hearing;
University Student Conduct Hearing;
Witness/Victim Meeting;
Behavior Team Action;
Student Service Experience



MANAGE CASE TYPES



Roles

> *Reminder: Role Subsets are on Config!*

Roles
30 character limit per option

- Alleged;
- Complainant;
- Respondent;
- Victim;
- Witness;
- Student of Concern;
- No Role;
- Requester;
- Guest





MANAGE USERS

MANAGE USERS

- > Delete unused/old accounts
- > Transfer Hearing Officer Titles
- > Never use general office accounts
- > Do not use office email addresses for individual user accounts

900 -- User Accounts Report
901 -- User Account System Health Check
908 -- Analytics Report for Individual User
909 -- Saved Custom Queries

MANAGE USERS

- > 900 Reports at a glance
 - > **900 -- User Accounts Report**
 - Settings such as: access level, group membership, what letters, analytics, and forms the user can access.
 - > **901 -- User Account System Health Check**
 - Last login, count of assigned cases by status, status of IRs, letters, CRFs, etc.
 - > **908 -- Analytics Report for Individual User**
 - Displays the analytics users have access to.
 - > **909 -- Saved Custom Queries**
 - Displays the custom analytics users have saved.



MANAGE GROUPS

MANAGE GROUPS

> You don't want too many groups, but don't be afraid to create necessary groups either!

That's a LOT of groups!
What's a "Whatever Group"?
Make it make sense!

916 -- Group Memberships
915 -- Cases with No Access Restriction

Manage Groups > Overview + Add Group

EDIT	GROUP ID	NAME	DESCRIPTION	NUMBER OF MEMBERS	NUMBER OF CASES
Edit	2	BIT	Multidisciplinary group that helps to ensure the well-being of the campus community	22	9
Edit	5	Academic Integrity	Academic Integrity cases	24	11
Edit	13	Records Requests	Cases assigned to this group involve records requests (Student-initiated, Background Checks, Dean's Certifications, Open Records, etc.).	16	1
Edit	14	Title IX	All cases involving gender-based equity concerns start in this group.	16	8
Edit	16	Title IX - Confidential	Title IX reports that require additional confidentiality due to the nature of the incident or individuals involved.	17	0
Edit	19	Title IX - Conduct	All cases involving gender-based equity concerns move to this group during adjudication.	20	1
Edit	20	Title IX - Employee Cases	Title IX Cases involving employees (faculty/staff).	20	3
Edit	21	Student Complaints		16	8
Edit	25	Employee Relations		10	10
Edit	26	Community Health Cases	Cases involving community health crises	24	0
Edit	27	Early Alert	Academic Early Alert Cases	6	5
Edit	28	BIRT	Cases involving reports of bias on campus	22	0
Edit	29	Disability Services	Cases being managed by Disability Services	7	6
Edit	30	Victim Advocate		3	1
Edit	31	Whatever Group		6	3
Edit	32	Basic Needs Group		1	0

MANAGE GROUPS

> Level 5 users can receive notifications of changes to group membership

IN-SYSTEM NOTIFICATIONS

Set in-system notifications. For selected items, you will only receive a notification for actions that other users initiate. For example, if you have "New cases" selected, you will receive a notification when a new case is created by someone else and assigned to you. We will not send notifications to you about cases you create for yourself.

Would you like an in-system notification for ...

New cases?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Reassigned cases?	<input type="radio"/> Yes <input checked="" type="radio"/> No
New Incoming Reports (IRs)?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Forwarded IRs?	<input type="radio"/> Yes <input checked="" type="radio"/> No
IRs on which you are copied?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Tasks?	<input type="radio"/> Yes <input checked="" type="radio"/> No
New notes in your cases written by others?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Pings?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Letters in progress that others have saved for your review?	<input type="radio"/> Yes <input checked="" type="radio"/> No
CRFs sent for your review?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Watchlist cases?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Addition of new members to a group?	<input checked="" type="radio"/> Yes <input type="radio"/> No

916 -- Group Memberships
915 -- Cases with No Access Restriction

MANAGE GROUPS

> You can assign permissions based on group membership

This screenshot shows the 'Manage Users Screen' under the 'Analytics' tab. The navigation bar includes 'General Privileges', 'Communication', 'Analytics', 'Charges/Issues', 'IR Layouts', 'Letters', 'Forms', 'Sanctions/Actions', and 'Signatures'. Below the navigation bar, there is a 'Sight Lines' section with the text: 'Which reports can this user run? If access is inherited from a group membership, the report will be underlined with dashes.' Below this text are three checked items: '1 - Snapshot of process', '2 - All cases summary', and '3 - Active cases summary'.

- Administrative
- Manage users
- Manage groups
- Manage charges
- Manage sanctions
- Manage tasks
- IR Layouts
- Manage letters
- Manage analytics
- Manage offices
- Configuration

This screenshot shows the 'Manage Groups Screen' under the 'Analytics' tab. The navigation bar includes 'Analytics', 'Charges/Issues', 'IR Layouts', 'Letters', 'Forms', and 'Sanctions/Actions'. Below the navigation bar, there is a 'Check/Uncheck All' checkbox. Below this is the text: 'Which reports can members of this group run?'. Below this text are five checked items: '1 - Snapshot of process', '2 - All cases summary', '3 - Active cases summary', '4 - Overdue Cases', and '5 - Overdue Cases including Outstanding Sanctions/Actions'.

916 -- Group Memberships
915 -- Cases with No Access Restriction



MANAGE CHARGES AND SANCTIONS

MANAGE CHARGES

- > Unpublish / delete old charges and create new ones
- > Don't use html in your charge titles!
<bold>
NO, NO, NO!
- > Completing a handbook revision? Check out our help topic:
[Code Revisions: How to handle updated charges in Maxient](#)

MANAGE SANCTIONS

- > Can be used across various processes
- > Do **not** duplicate!
- > Are there sanctions you no longer use?
 - > Unpublish them via the Manage Sanctions Screen!



MANAGE LETTERS, LETTERHEADS, & FORMS

MANAGE LETTERS

- > Are there templates, forms, or letterheads you no longer use?
 - > Delete them!
 - > It will not affect any letters you've sent.
 - > You just won't be able to use those items moving forward.
- > Do some templates need updating?
 - > Make those changes and make good use of merge fields!
 - > Don't make up merge fields... they won't work.

MANAGE LETTERS

> Use CATEGORY to organize your letter templates by process!

Letters				
EDIT	CATEGORY	DISPLAY NAME	ID	LETTERHEAD
Edit	Academic Integrity	Initial Meeting Letter	120	OSC
Edit	Academic Integrity	Board Hearing Notice	124	OSC
Edit	Academic Integrity	Informal Outcome Letter	125	OSC
Edit	Academic Integrity	Formal Hearing Outcome Letter	126	OSC
Edit	Academic Integrity	Interim Measures Memo	127	OSC
Edit	CARE	Request to Meet	5	Blank
Edit	CARE	Student of Concern Resources Letter	27	OSC
Edit	Student Conduct	Initial Appointment Letter - OSC	1	OSC
Edit	Student Conduct	Initial Appointment Letter - HRL	2	OSC
Edit	Student Conduct	Student Conduct Hearing Outcome	3	OSC
Edit	Student Conduct	Missed Appointment Letter	8	OSC
Edit	Student Conduct	Parental Notification	11	OSC
Edit	Title IX	No Contact	9	OSC
Edit	Title IX	Title IX - Notice of Investigation (Complainant)	60	OSC
Edit	Title IX	Title IX - Notice of Investigation (Respondent)	61	OSC



ANALYTICS FOR OVERALL MANAGEMENT

OVERALL MANAGEMENT

-  **Dates**
Review Problematic Dates (Analytic 912)
-  **Unassigned Cases**
Open Cases Not Assigned to a Current User (Analytic 913)
-  **Access Restrictions**
Cases with No Access Restriction (Analytic 915)
-  **Review Demographic Data**
Demographic Feed & Configuration Screen Values Crosscheck Report (Analytic 910)



Questions?



Thank You!

Please complete the evaluation for this program found in Guidebook to help us plan for future MaxFests.

Maxient for Supervisors

Sarah Kiely and
Shayna Quiros |
University of New
Hampshire

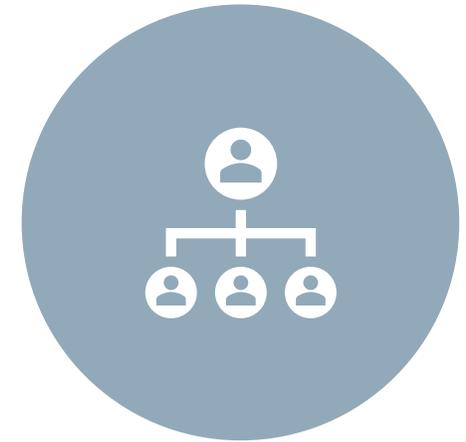
Learning outcomes



Understand how principles of case management can inform a seamless student process



Understand how system features can be used as practical strategies to maintain consistency, avoid gaps in recordkeeping, and avoid siloing information



Understand how system features can empower managers with oversight responsibilities at your campus



About the University of New Hampshire

- Established in 1866
- Located in Durham, NH (1 hour from Boston, MA)
- Flagship, University System of New Hampshire
- 4-year, RI, public, mid-size
- Eleven academic colleges and schools (200+ degree programs)
- Fall 2023 Enrollment - 16,500 (all campuses)
- Residential beds – 7,000 (Durham campus)

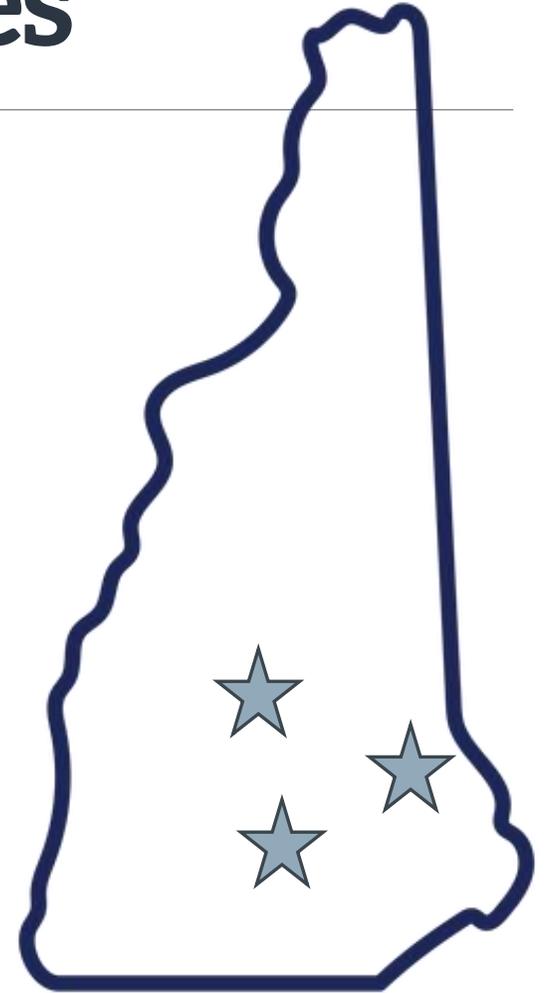
Component Campuses

UNH Manchester, established in 1967

- UNH Manchester merged with Granite State College in 2023
- College of Professional Studies, Manchester & CPS Online

Franklin Pierce Law Center

- Disaffiliated from Franklin Pierce College
- Merged with UNH in 2010
- UNH Franklin Pierce School of Law



UNH Community Standards

Oversight and administration of the University conduct system

Residential Conduct

Academic Misconduct

General Student Conduct Complaints

Civil Rights and Equity Office

Institutional oversight of Maxient

Primary contact for campus software management

What does UNH use Maxient for?

Student Conduct - on and off
campus (not residential)

Residential Conduct

Academic Misconduct

Police Activity

Student Concerns

BIT

Basic Needs

Fraternity and Sorority Life
and Recognized Student
Organization Conduct

Record Requests

What supervisory and oversight roles exist at UNH?

Community Standards

- Oversight of conduct process
- Hearings and appeals
- Non-residential conduct

Dean of Students Office

Academic appeals

What supervisory and oversight roles exist at UNH?

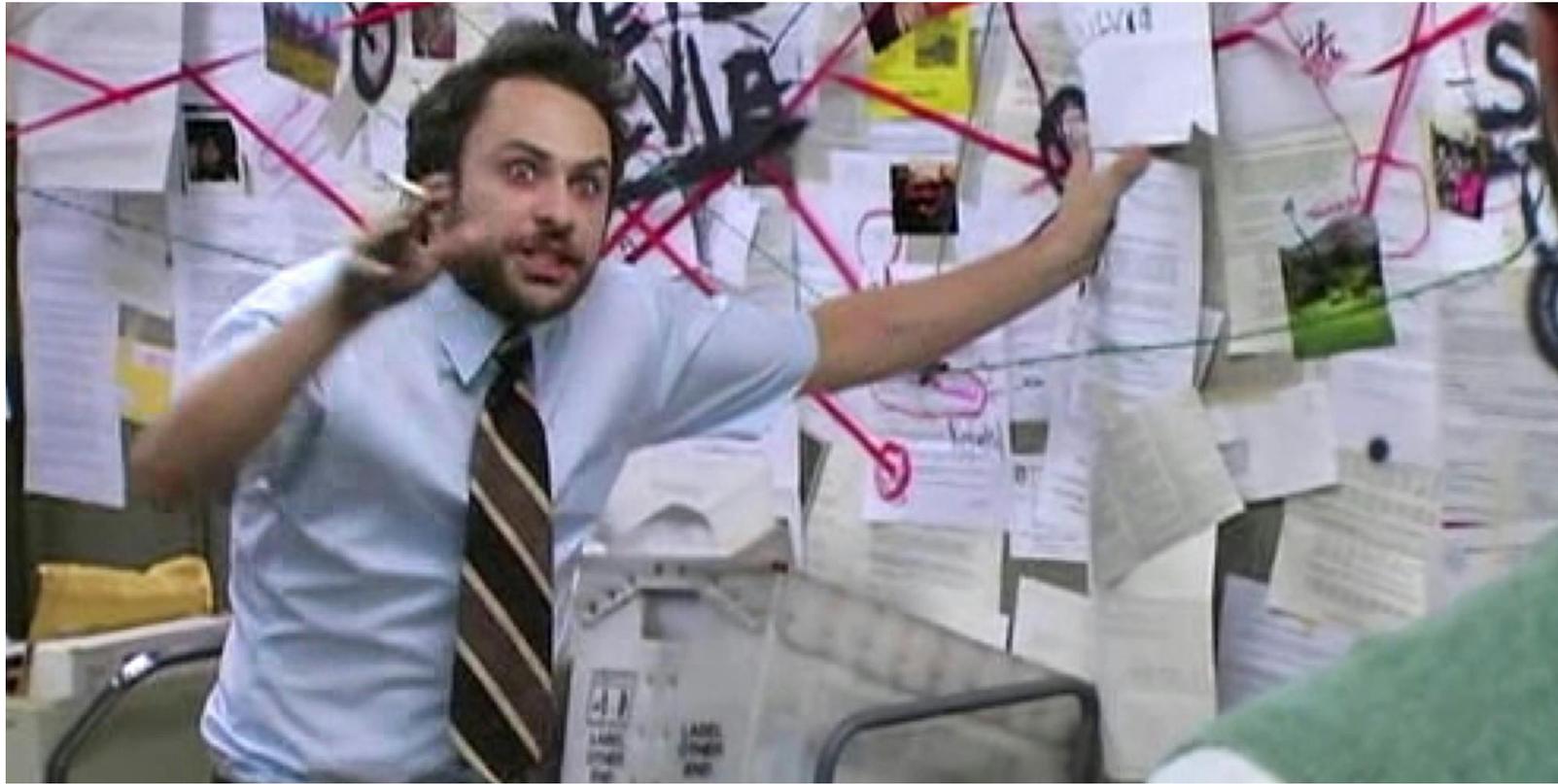
**Supervisors of
conduct officers**
Residence Life and
Housing

Chairs of teams
BIT

Program managers
Basic Needs

Faculty
Academic Misconduct

So, how do we work together to manage oversight and support supervisors in all these areas across our campuses?



Great question!

Let's start by talking
about the “three R's” of
case management

Review

Intake process allows case manager to determine what the best course of action is, and how to resolve the matter

- Standard steps for responding to any case type
- Individual evaluation
- Timely review
- Supervisor involvement

Response

Case manager identifies the resolution pathway for the report

- Establish case turnaround times
- Set a threshold for behavior that establishes whether higher-level intervention is needed.
- Communication
- Documentation

Resolution

Case manager is responsible for monitoring the case through its conclusion

- Updating case with all documentation
- Closing case when complete

Why are we talking about case management?

Responsibility

Responsibility over supervisee's case management

Accountability

Following institution's processes

Addressing lapses

Compliance with law

Consistency

Consistency \neq doing the same thing every time

How Maxient can help you

Access Management

Managing user access and controlling access to records are among the most effective oversight tools available

User Access – User Levels

We use the Least Privilege Principle, granting the minimum necessary access.

Benefit: Enhances security by ensuring users only have access to the resources necessary for their roles

Only the system administrator can grant access to Maxient. The home office or supervisor must request user access.

Benefit: Ensures tailored, secure access, enhancing overall system security

We minimize the number of users with the highest user levels (4 & 5)

Benefit: Enhances system security and reduces the risk of unauthorized access to records and changes to configuration.

Access Restriction - Groups

In a multi-campus environment with different oversight roles, we leverage groups to segregate data specific to each individual campus

Benefit: Ensures efficient data management and access control

Create distinct groups for categories of records.

Benefit: Ensures ability to tailor access restrictions for enhanced security and confidentiality.

We use consistent naming convention when creating groups

Benefit: Enhances overall system usability and administrative efficiency

When assigning users to groups, we use the least privilege principle

Benefit: Enhances security by ensuring users only have access to the records necessary for their roles

Other access limitations to consider

Deletion Privileges – The ability for a user to delete cases from the system

This permission is assigned only to level 5 users

Benefit: Limiting the ability to delete records to level 5 users enhances data integrity and security

Lock Account – The ability to suspend a user's access without deleting their account from Maxient

Temporarily lock user accounts during periods when contracts are not active or when a user is on any type of leave from the institution

Benefit: Enhances security by preventing unauthorized access during prolonged periods of inactivity

Incident Reporting Forms and Routing Rules

Incident Reporting Forms (IR Layouts)

Incident Reporting Forms are crucial for gathering sufficient and appropriate information necessary for thorough reviews

Utilizing different layouts tailored to specific matters or situations ensures that all relevant details are captured effectively

Establishing a robust IR layout foundation is essential for accurate analysis, routing and decision making

Routing Rules

Strategy: Use available fields when creating a routing rule to determine the most appropriate recipient of the form

Benefit: leverages report content to ensure effective handling of information

Strategy: Use the “copies to” feature to add appropriate supervisor

Benefit: ensures supervisors are consistently informed of reports, promoting seamless oversight and enabling timely intervention if staff availability becomes an issue

twain (Mark Twain)
vonnegut (Kurt Vonnegut)
whitman (Walt Whitman)
=== Route to specific hearing officer title ===
Dean of Students (Henri David Thoreau)
Asst. Dir. - Judicial Affairs (NO PERSON IN THIS ROLE)
Asst. Dir. - Judicial Affairs (NO PERSON IN THIS ROLE)
Asst. Dir. - Judicial Affairs (NO PERSON IN THIS ROLE)
Asst. Dir. - Judicial Affairs (NO PERSON IN THIS ROLE)
Area
RHD - Capstone House (J. K. Rowling)
RHD - North Quad (Ralph Waldo Emerson)
RHD - Patterson Hall (NO PERSON IN THIS ROLE)
RHD - Simmons Tower (F. Scott Fitzgerald)
RHD - Tucker House (Herman Melville)
Special Assistant to the House Dean (George Orwell, MSW, CSW)
Graduate Assistant - Secret Projects (Norton Juster)
=== Route to specific hearing officer title ===

You may select a specific user by:
Username
OR
Hearing Officer Title

Create new entry

Layout ID:

Status of this rule:

Nature:

Location:

Urgency:

Recipient:

Copies To:

SMS To:

Comma-separated list of email addresses to receive a copy

Comma-separated list of usernames to be text messaged (if they have provided their cell number)

Create

Routing Rules

Strategy: Identify appropriate central user for routing when there are no matching rules

Benefits: avoids any possibility of reports slipping through unnoticed

“Discarded” and “Set Aside” reports

Supervisors are strongly advised to review all incoming reports placed in the “Discarded” or “Set-Aside” status

The use of these statuses should be strictly limited and in-line with your campus’ processes

Involved Person(s)	Submitted By	IR Held By	Stage	View
Tinker (Tink) Bell James (Captain Hook) Hook	Shayna Quiros	[REDACTED]	Set Aside	 
Tinker (Tink) Bell James (Captain Hook) Hook	Shayna Quiros	[REDACTED]	Discarded	 
Tinker (Tink) Bell James (Captain Hook) Hook	Shayna Quiros	[REDACTED]	Discarded	 
Tinker (Tink) Bell James (Captain Hook) Hook	Shayna Quiros	[REDACTED]	Discarded	 

Case Management

Sight Lines

Strategy: Assign supervisors Sight Lines access for each of their supervisees

Benefits: Enhances accountability, monitors workflows, and aids in effective caseload management

Woodrow College
Conduct Manager
Saturday August 13, 2022

User: Gertrude Stein
Access Level: 5

Welcome Gertrude Stein!

Sight line into:

Today's Schedule IRs (1) CRFs in Progress (0) Letters in Progress (0) Tasks (4)

Show 100

File ID

Showing 0 to 0 of 0 records found

Case Created	Deadline	Actions
records found		

Previous Next

The information contained on these pages is privileged and confidential information intended solely for the individual or entity who has accessed it for official purposes and by lawful means. Any dissemination, distribution, or copy of this communication is strictly prohibited. If you have received this communication in error, please immediately notify us by telephone at (434) 295-1748, and return the original message to us via the U.S. Postal Service at Woodrow College, Student Center Suite 450, Charlottesville, VA 22903, without retaining a copy.

Woodrow College
Conduct Manager
Saturday August 13, 2022

User: Gertrude Stein
Access Level: 5

Welcome Gertrude Stein!

Sight line into: Amy Farrah Fowler (afowler)

You are viewing the home screen of Amy Farrah Fowler

Today's Schedule (0) Unheard Cases (1) Overdue Cases (3) Collaborating (0) Pending IRs (2) CRFs in Progress (0) Letters in Progress (2) Tasks (5)

Show 100 entries

Search:

File ID	Name	Case Type	Incident Date	Case Created	Deadline	Actions
No matching records found						

Showing 0 to 0 of 0 entries

Previous Next

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Collaborators

Strategy: supervisor can be added to a case for case tracking or oversight purposes

Benefit: Displaying cases on the supervisor home screen ensures information is readily available and prevents important details from being overlooked

Woodrow College Conduct Manager
User: Gertrude Stein
Access Level: 5
Saturday August 13, 2022

Update Existing Case

2021001803 Andrew Baines "Andy or Nard Dog" Bernard (987654014)

Access Restriction: Academic Integrity

Access Restriction Description: For more information, please contact a Maxient level 5 user.

Collaborators

Click here to select collaborators ...

- Edgar Allen Poe, Associate Dean of Students
- F. Scott Fitzgerald, Residence Hall Director - Tucker House
- George Orwell, Coordinator of Judicial Affairs/Student Conduct
- Gertrude Stein, Dean of Imagination**
- Henry David Thoreau, Dean of Students

[Add a milestone](#)

Woodrow College Conduct Manager
User: Gertrude Stein
Access Level: 5
Saturday August 13, 2022

Welcome Gertrude Stein!

Sight line into: [Dropdown]

Today's Schedule (0) | Unheard Cases (7) | Overdue Cases (11) | **Collaborating (2)** | Pending IRs (2) | CRFs in Progress (0) | Letters in Progress (0) | Tasks (4)

Show 100 entries

File ID	Name	Case Type	Status	Assigned To User	Last Modified	Actions
2021001802	William Schneider	Academic Integrity	Open	Amy Farrah Fowler	2022-08-13 3:43pm	Actions
2021001803	Andrew Bernard	Academic Integrity	Open	Amy Farrah Fowler	2022-08-13 3:43pm	Actions

Showing 1 to 2 of 2 entries

Previous 1 Next

Tasks and task templates

Strategy: Create task templates with detailed task descriptions for all resolution processes

Benefit: task descriptions can serve as a built-in manual, providing clear instructions and guidance for executing tasks correctly and efficiently during case resolution

Strategy: as a training tool, users are required to add appropriate task template to each case

Benefits: ensures consistent adherence to organizational protocols and requirements

Update Existing Case

CASE	DEMOGRAPHICS	CONTACT	INCIDENT	EFC	ASSIGNMENT	RESOLUTION	ACTIONS	TASKS	NOTES	OTHER	ADMINISTRATIVE	
C. Conduct Conference - Full Conference												
<input type="checkbox"/>	Prepare for full conference						Sarah Kiely	2024-06-10	⌵			
<input type="checkbox"/>	Meet with respondent						Sarah Kiely	2024-06-14	⌵			
<input type="checkbox"/>	Complete CRF						Sarah Kiely	2024-06-19	⌵			
<input type="checkbox"/>	Create and send Outcome Letter to respondent						Sarah Kiely	2024-06-19	⌵			
<input type="checkbox"/>	Update Case						Sarah Kiely	2024-06-21	⌵			

[Add new tasks from scratch](#) [Add new tasks from a template](#)

Audit Trails

Strategy: supervisors can see every action within a case

Benefits: supervisors can check case actions at any time, without needing to have a conversation with their supervisee

Update Existing Case

CASE	DEMOGRAPHICS	CONTACT	INCIDENT	EFC	ASSIGNMENT	RESOLUTION	ACTIONS	TASKS	NOTES	OTHER
Hide audit trail or open visual timeline in a new window										
Show	25	▼	entries							
Date and Time	▲	User	◆	Action						
2024-05-07 12:36:49		██████████		DEADLINE updated for all parties on Update Existing Case for ██████████						
2024-05-08 13:29:41		Shayna Quiros		Summary case record viewed on Find Case screen						
2024-05-08 13:29:44		Shayna Quiros		Case record accessed on Update Existing Case screen						
2024-05-08 13:29:55		Shayna Quiros		Database entry updated. ACCESS_RESTRICTION changed from 6 to 4 changed from Residential Life & Housing to Office of Community St						
2024-05-08 13:29:55		Shayna Quiros		Notification of case reassignment sent to Shayna Quiros (Shayna.Q						
2024-05-17 12:13:08		Shayna Quiros		Case record accessed on Update Existing Case screen						
2024-05-17 12:13:40		Shayna Quiros		Case record accessed on Update Existing Case screen						
2024-05-17 12:17:36		Shayna Quiros		Case record accessed on Update Existing Case screen						
2024-05-17 12:17:39		Shayna Quiros		Timeline viewed						
2024-05-17 12:17:51		Shayna Quiros		Case record accessed on Update Existing Case screen						

Milestones

Strategy: use of milestones can be required for designated case types

Benefit: milestones allow a supervisor to easily check on the status of a case via the visual timeline

Pings

Strategy:

Pings allow for communication within a specific case

Supervisors can add themselves as a recipient

Benefit:

Streamlines communication

Allows for communication with multiple individuals

Adding oneself as recipient saves a record of what was sent

Analytics

Analytics

Analytics are essential for supervisors and oversight, offering data driven insights for informed decisions in areas such as

Caseload Management
Performance monitoring
Accountability
Resource allocation

Analytics – Dashboard Reports

Strategy: Grant access to Dashboard Reports to supervisors for each of their staff

Benefit: Enables real-time monitoring and management of supervisee's performance and case progress

Strategy: Train staff to be aware of their dashboard report, understand its importance, and encourage routine review for effective monitoring of their cases

Benefit: Ensures that staff are aware of and can access their dashboard reports, leading to better self-monitoring and timely identification of issues, ultimately enhancing overall performance and accountability

Analytics - Custom Reports

**Think outside of the
box!**

Analytics - Custom Reports

Supervisory Reports – Summary overview of direct supervisees and/or team

Data Entry – Catch administrative errors

Agendas – Create agendas for committee and team meetings

Program Reports – Basic needs programs

**What is the end
goal of our
presentation?**

**The end goal is to encourage
a culture of collective
accountability on our
campuses**

Maxient offers many tools that promote collective accountability

Your teams will work together seamlessly, track case progress efficiently, and maintain a unified approach to case management

Connect with us!

Sarah.Kiely@unh.edu and Shayna.Quiros@unh.edu

UNH Community Standards:
www.unh.edu/conduct



Maximizing and Demystifying Your Title IX Workflow



Turi Watson
Client Success Advisor



Michael Ginsburg
Client Success Advisor

The Agenda

- Overview
- Incident Reporting
- System Setup
- Access
- Communication
- Letters

The Agenda

- EFC Folders
- Notes
- Tasks
- Manual Data Feed Entries
- Milestones
- Timeline
- Analytics

System Setup

- IR Layouts
 - 2020 vs. 2024 Regs
 - Still need a Formal Complaint form
- Adding Routing Rules
- Landing pages

System Setup

- Configuration
 - Case Type(s)
 - Subset for Title IX
 - CC Recipients
 - Hearing Officer Titles
 - Roles and Terms for Alleged and Complainant
 - Milestones
 - Note Categories
 - Tags

System Setup

- **Manage Users**
 - Adding users and permissions
- **Manage Groups**
 - Controls who can see the details of what
- **Manage Case Types**

System Setup

- **Manage Letters**
 - Title IX specific letters
 - Student Conduct Institute (SCI) and ATIXA letters
- **Manage Tasks**
 - Create a list of To Do's with Task Templates

System Setup

- **Manage Charges/Issues of Concern**
 - Still need mirror Reported Issues of Concern for Complainants
- **Manage Sanctions/Actions**
 - Supportive Measures
 - Interim Actions



IR Layouts Screen



IR Layouts Screen

- Benefits of unique IR Layouts for Title IX
 - Customize tone and questions
 - Distinct Routing Rules
 - Targeted Post-Submit email and screen messages
 - Optional Authentication

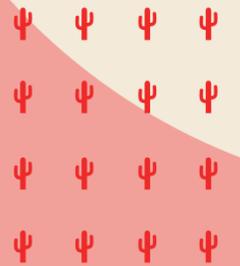


Example

[Title IX \(Sexual Misconduct\) Reporting Form](#)

IR Layouts Screen

- CC Recipient of an IR receives link in email
 - Links active for as long as you require
 - Time frame set on Configuration
 - If need to remove access before time expires, delete the IR on the Incoming Reports screen



IR Layouts Privacy

PERMIT WATCHLIST NOTIFICATIONS

If for any reason the involved parties on this layout should not be considered for watchlist notifications, you may set this option to "No". Note: The SID is used to trigger these notifications, so it must be active for involved parties for this to work.

Yes No



IR Layouts Privacy

WHO HAS ACCESS?

The "Incoming Reports" screen provides an overview of all submissions via reporting forms like this one. By default, users can only see the submissions on which they are the primary recipient. If there are users who should be able to see all submissions from this layout, regardless of who the primary recipient is, select their name here. Additionally, all members of any groups selected here will also see submissions from this layout.

Users

- Gertrude Stein, Dean of Imagination
- Jean-Paul Sartre, Associate Dean of Students
- Kurt Vonnegut, Chair, Student of Concern Team
- Toni Morrison, Director of Student Conduct
- Wynton Marsallis, Dean of the School of Music
- [Check/Uncheck All](#)

Groups

- Academic Integrity *Academic Integrity case managers.*
- Accessibility Services
- BIRT *Reports of bias occurring on campus.*
- Community Health Cases
- Early Alert
- Employee Relations



IR Layouts Privacy

IR LAYOUTS ACCESS

On the Manage IRs screen, the user will see all reports assigned to them and any submitted via these layouts. Note: They may have access to some reports not indicated here by virtue of group membership.

- 0 - Incident Reporting Form
- 1 - REGIONAL TRAINING:Academic Integrity Reporting Form
- 2 - Concerning Behavior Reporting Form
- 3 - REGIONAL TRAINING: Concerning, Threatening, or Worrisome Behavior
- 4 - Report Awesome Things
- 5 - Student Conduct or Academic Dishonesty Appeals Form
- 8 - REGIONAL TRAINING: Academic Misconduct Reporting Form
- 10 - Zombie Pandemic Communication Report
- 11 - Police DepartmentReport Submission Form
- 15 - Academic Dishonesty
- 18 - Academic Misconduct Reporting
- 30 - MaxFest 2018:Incident Reporting Form





Configuration Screen



Configuration Screen

- **What needs to be added?**
 - CC Recipients / Recipient Groups
 - Clery Associated Charges/Issues
 - Hearing Officer Titles
 - Task Categories
 - Title IX Associated Charges/Issues

Manage Case Types

- **Adjust Terminology for a Case Type**
 - Charges/Issues
 - Hearing Officer
 - Incident
 - Sanctions/Actions

Manage Case Types

- **Adjust Terminology for a Case Type**

Manage Case Types

Maxient now allows you to customize the screen appearance by case type. While it is not possible to completely change an underlying field (e.g. SID cannot become favorite color), many fields can be relabeled to better reflect their role in a given case type. Additionally, irrelevant fields can be hidden to further simplify the screen.

Select a case type to view or begin a new one below

Title IX

Values that deviate from the default will be **accented in green**.

Standard Terminology	Customized Name
Charge	Charge/Concern
Hearing Officer	Administrator
Incident	Incident
Sanction	Sanction/Supportive Measure

Manage Case Types

- **Manage Lists**
 - Restricts options for this case type
 - This will simplify your screens for your users
 - Can be adjusted as needed over time
 - Review on a regular basis with your team

Manage Case Types

- **Manage Lists**

Title IX

Values that deviate from the default will be **accented in green**.

Terminology **Lists** Fields to Hide or Repurpose

Item	Available Options
Appeal Statuses <i>20 character limit per option</i>	No appeal filed; Appeal received; Approved; Denied
Classifications <i>30 character limit per option</i>	Freshman; Sophomore; Junior; Senior; Graduate; Employee; Not Enrolled
Deadline Offset Default	100
Findings <i>30 character limit per option</i>	Responsible; Not Responsible; FYI

Manage Case Types

- **Manage Lists**

<p>Milestones <i>255 character limit per option</i></p>	<p>Reported to Official with Authority; Reported to TIX Coordinator; Initial Meeting with Complainant; Formal Complaint Received; Notice of Investigation Sent; Investigation completed; Evidence shared with Parties; Evidence Review Response Received; Investigation Report Shared with Parties; Hearing; Outcome notification; Appeal submitted; Appeal response sent; Case Closed; Case Re-Opened</p>
<p>Note Categories <i>100 character limit per option</i></p>	<p>Communication; Delay Reason; General Information; Interim Action; Meeting; Other Contact; Parent/Guardian/Family Contact; Referral; Resolution; Walk-In; Synopsis of Case; Interview Summary</p>

Manage Case Types

- **Manage Lists**

<p>Referral Sources <i>50 character limit per option</i></p>	<p>Dean of Students Office; Housing and Residence Life; Public Safety; Athletics; Faculty; Administration; Student; Other</p>
<p>Resolution Types <i>50 character limit per option</i></p>	<p>Informal Administrative Hearing; Formal Administrative Hearing; Witness/Victim Meeting</p>
<p>Roles <i>30 character limit per option</i></p>	<p>Complainant; Respondent; Witness</p>
<p>Tags <i>100 character limit per option</i></p>	<p>Institution made determination to initiate the conduct process; Complainant requested no further action; Complaint did not meet definition of a Sexual Harassment policy violation; Complaint did not meet definition of a policy violation; Institution had no jurisdiction to investigate; Complainant was unresponsive to outreach; Alcohol influence/Drug influence; Respondent, was unknown to Complainant; Respondent, was known to Complainant; Violence/serious physical injury involved</p>

Manage Case Types

- **Fields to Hide or Repurpose**
 - Allows you to rename fields for a specific process
 - If you are tracking employee supervisors and departments in the Academic Advisor and Academic Major fields, you can adjust the names of the fields.
 - Allows you to Hide fields irrelevant for a specific process
 - Simplifies your screens for your users. Information entered at creation will remain in the case.

Manage Case Types

- **Fields to Hide or Repurpose**

Title IX

Values that deviate from the default will be **accented in green**.

Terminology Lists **Fields to Hide or Repurpose**

Maxient Variable	Field	Customized Name	Visibility
ACADEMIC_ADVISOR	Academic Advisor	Supervisor	<input type="checkbox"/> Hide
ACADEMIC_MAJOR	Academic Major	Department	<input type="checkbox"/> Hide
MEM_ATHLETICS_SPORT	Athletic Affiliation	Athletic Affiliation	<input checked="" type="checkbox"/> Hidden
CLERY_RATIONALE	Clery Rationale	Clery Rationale	<input type="checkbox"/> Hide
CLERY_REPORTABILITY	Clery Reportability	Clery Reportability	<input type="checkbox"/> Hide
GPA_CUME	GPA Cumulative (at case creation)	GPA Cumulative (at case creation)	<input checked="" type="checkbox"/> Hidden
GPA_LAST_TERM	GPA Previous Term (before case)	GPA Previous Term (before case)	<input checked="" type="checkbox"/> Hidden



Other

M a n a g e m e n t

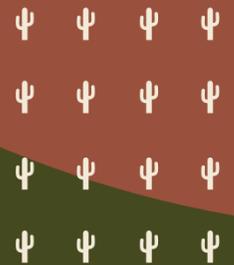
S c r e e n s



Access Restrictions

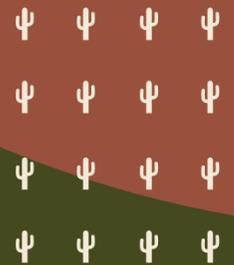
- Restrict cases so only a subset of users see case details

EDIT	GROUP ID ▲	NAME	DESCRIPTION	NUMBER OF MEMBERS	NUMBER OF CASES
Edit	2	Behavioral Intervention Team	Multidisciplinary group that helps to ensure the well-being of the campus community	14	9
Edit	5	Academic Integrity	Academic Integrity case managers.	12	9
Edit	13	Records Requests	Cases assigned to this group involve records requests (Student-initiated, Background Checks, Dean's Certifications, Open Records, etc.).	10	4
Edit	14	Title IX	All cases involving gender-based equity concerns start and end in this group.	9	23
Edit	16	Title IX - Confidential	Title IX Confidential Reports where students reported to confidential reporters, but that information needs to be tracked for Clery or other reporting purposes.	8	0



Manage Letters

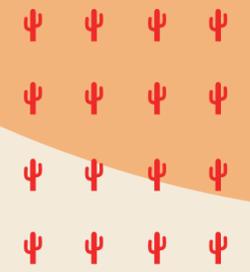
- **Specific Letter Templates**
 - Notice of Options and Resources
 - Supportive Measures and/or Interim Actions
 - Notice of Investigation
 - Notice of Outcome
- **Samples in the Help Forum**
 - [Title IX Letters](#)



Manage Sanctions and Actions

Track Supportive Measures and Interim Actions

View the [Help Forum Topic](#) for more info

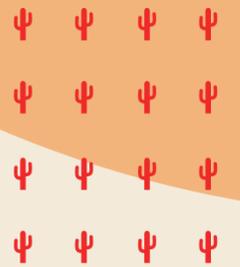


EDIT	SECTION	▼	DESCRIPTIVE NAME
Edit	Supportive Measures		Academic Support - Excused Absence
Edit	Supportive Measures		Academic Support - Extension on Deadline
Edit	Supportive Measures		Academic Support - Incomplete
Edit	Supportive Measures		Campus Escort
Edit	Interim Actions		Interim Suspension
Edit	Interim Actions		Administrative Room Change
Edit	Interim Actions		Course Change

Manage Charges and Issues of Concern

Add mirror Issues of Concern with the work “Reported” pre-pended to add to Complainant’s file

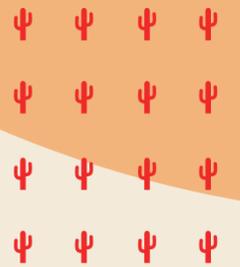
Edit	Title IX - Complainant	Reported Intimate Partner Violence
Edit	Title IX - Complainant	Reported Non-consensual Sexual Contact
Edit	Title IX - Complainant	Reported Non-consensual Sexual Penetration
Edit	Title IX - Complainant	Reported Sexual Exploitation
Edit	Title IX - Complainant	Reported Sexual Harassment
Edit	Title IX - Complainant	Reported Stalking
Edit	Title IX - Respondent	Intimate Partner Violence
Edit	Title IX - Respondent	Non-consensual Sexual Contact
Edit	Title IX - Respondent	Non-consensual Sexual Penetration
Edit	Title IX - Respondent	Sexual Exploitation
Edit	Title IX - Respondent	Sexual Harassment
Edit	Title IX - Respondent	Stalking



Manage Sanctions and Actions

Track Supportive Measures and Interim Actions

More info in our [Help Forum Topic](#)



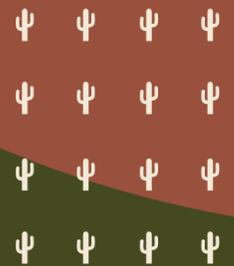
EDIT	SECTION	▼	DESCRIPTIVE NAME
Edit	Supportive Measures		Academic Support - Excused Absence
Edit	Supportive Measures		Academic Support - Extension on Deadline
Edit	Supportive Measures		Academic Support - Incomplete
Edit	Supportive Measures		Campus Escort
Edit	Interim Actions		Interim Suspension
Edit	Interim Actions		Administrative Room Change
Edit	Interim Actions		Course Change

Workflow Recommendations

- One case per incident
- Document all steps taken to create timeline / procedural steps
- If hand off to investigative / adjudicative body, may change:
 - Case Type
 - Home Office
 - Access Restriction

Milestones

- **Track dates of significant steps in your process**
 - Can be used to create turnaround time in analytics
- Added on Configuration Screen
- Applied to whole case on *Case* tab on *Update Existing Case* screen
- Can be added more than once
 - Ex. – Case Closed and Case Re-Opened



Milestones

Track significant steps and date

====Title IX Use Only====;

Reported to Official with Authority;

Reported to TIX Coordinator;

Initial Meeting with Complainant;

Formal Complaint Received;

Notice of Investigation Sent;

Investigation completed;

Evidence shared with Parties;

Evidence Review Response Received;

Investigation Report Shared with Parties;

Hearing;

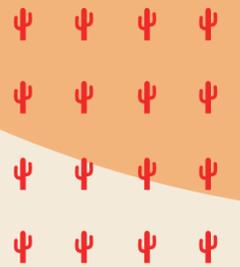
Outcome notification;

Appeal submitted;

Appeal response sent;

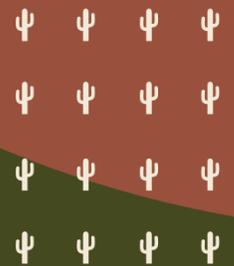
Case Closed;

Case Re-Opened



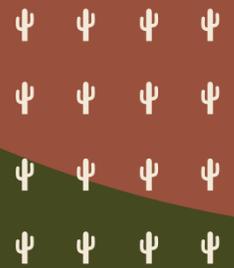
Case Resolution – No Investigation

- **Complainant's File**
 - Add Reported Issues of Concern
 - Findings
 - Blank, "No Action Taken", or "Reported"
 - Resolution Type
 - "Title IX – No Investigation"
 - Tags
 - "Complainant requests no further action"



Case Resolution – No Investigation

- **Respondent's File**
 - No need for a CRF as nothing to resolve

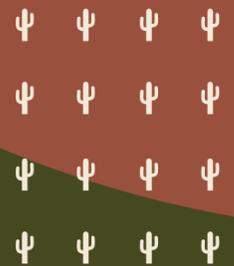


Case Resolution

– Adjudication

- **Respondent's File**

- Charges
- Findings
 - Corresponding Finding per Charge
 - May include *Permissive Dismissal*
- Resolution Type
 - Title IX Informal Hearing
 - Title IX Formal Hearing



Tags for Tracking Dispositions

- Added on *Create New Case, Update Existing Case, and/or the CRF*

Save in progress Finalize

FINALIZE

Has this case been resolved?

Yes. Outcomes here will be counted toward analytics, sanction alerts will be sent, and this data will be available to letter merge fields.

No. We'll put a copy of this in the EFC, but the case effectively remains unheard and a new CRF can be started at any time.

Keep this case assigned as-is, or move it to someone else?

DOS (Dr. Seuss) ▼

Add/remove tags

Click here to add/remove tags ...

Institution made determination to initiate the conduct process

Complainant requested no further action

Complaint did not meet definition of a policy violation

Institution had no jurisdiction to investigate

Complainant was unresponsive to outreach

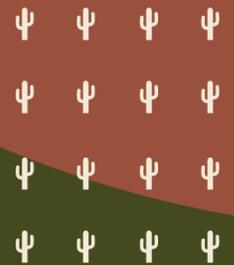
Alcohol influence/Drug influence

Tools for Title IX Success



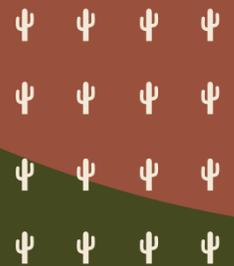
Collaborators

- Ability to add other Users assisting with case
- Added to whole case on *Case* tab on the *Update Existing Case* screen
- Viewable by the collaborator(s) on the *Collaborating* tab on the Home Screen



Manual Data Feed Entries

- Added by Level 5 users on the *Logs* screen in the *Manually Created Entries* tab
- Used for non-affiliated individuals to create a consistent demographic profile for case creation
 - Non-students, Student Organizations, Contractors, Vendors, and Visitors



Manual Data Feed Entries

Logs

Data Feeds

Data Feeds

Status

Manually Created Entries

To access a template for uploading, click the "Export CSV" button. If there are no entries on this screen, then the template will be blank. If there are entries, the export will show all of them. Simply delete the entries exported in the CSV file and begin entering your new individuals/organizations. Once imported, they will be added to any already listed.

New

Edit

Delete

Export CSV

Import CSV

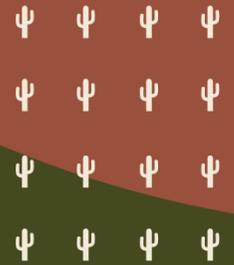
Select all

Deselect all

Search:

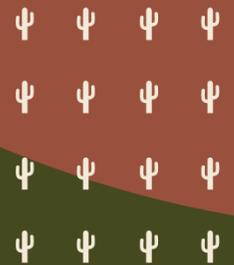
ENTRY SOURCE	SID	LAST NAME	FIRST NAME	MIDDLE NAME	PREFERRED NAME	DOB	GENDER	ETHNICITY	HOUSING	ROOM	LOCAL ADDRESS	LOCAL CITY	LOCAL STATE
--------------	-----	-----------	------------	-------------	----------------	-----	--------	-----------	---------	------	---------------	------------	-------------

manual	P00000000	Falcon	Freddie		Fred	2003-01-07	Male	Bird					
--------	-----------	--------	---------	--	------	------------	------	------	--	--	--	--	--



Letters: Cross - Case (XCASE)

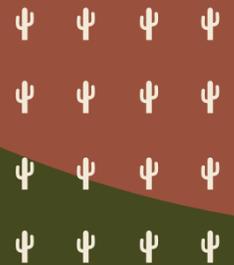
Merge Fields



- Used to pull file information from one file in a case into another when drafting letters
- Perfect for pulling Respondent's file info into a letter to send to the Complainant

Letters: XCASE Fields

- When drafting letter under Complainant's file, list of other parties appear from which to merge info



Letters and Forms

417) Title IX Case Outcome Letter

Your letter template contains one or more "XCASE" merge fields, designed to draw in information from other parties in the case. Please select the individuals whose information should be populated for these merge fields:

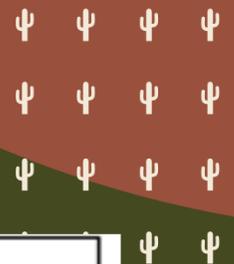
Name	Role	File ID
<input type="checkbox"/>	Respondent	2016001402

[Build it](#)

[Need to produce an envelope?](#)

Letters: XCASE Fields

- Info in draft bracketed to identify which content is selected. Delete the bracketed info!



Regarding Case Number: 2014006301

Dear Pamela Halpert:

This letter serves as notice of the final determination of the complaint filed by you, dated January 22, 2015, against **[[Michael Scott]]**

Michael Scott

. On March 12, 2015, a Formal Administrative Hearing resulted in the following decisions related to the alleged violations:

[[Michael Scott]]

6. Nonconsensual Contact: Nonconsensual physical contact of a sexual nature -- Responsible Harassment -- Responsible

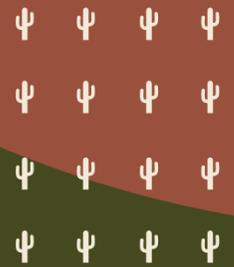
As a result, **[[Michael Scott]]**

Michael

was subsequently assigned the following sanctions:

Tasks

- Add from scratch or create a template
- Great for keeping track of To Do's
- Delegate responsibilities through Tasks



Notes

- Universal Notes
 - Use under limited circumstances and with ***extreme*** caution!
 - What's written here is seen in every case regardless of Case Type and Access Restriction

Notes

- Individual Notes
 - Automatically attributed to the author
 - Date and Time stamped
 - Track Time Spent
 - Arranged in chronological order
 - Can run analytics on Note category, Note Subject, and Time Spent

EFC

- Keep everything organized in folders
 - Create folders for correspondence, investigative materials / reports, hearing materials
 - When exported, folders are maintained in the zip folder
- Copy items within and between cases

Managing Your EFC

- *The Filter option lets you search through your files*



Managing Your EFC

- *Buttons at the top, right-hand corner of the EFC allow you to manage your documents and folders, but use caution to make sure you are taking the desired action!*

You have chosen to delete the following files ×

- Case Creation Sheet

DO YOU WANT TO PROCEED WITH DELETION?

You have chosen to copy the following files ×

- Case Creation Sheet

Copy to...

Case

Individual

Delete files from current location after copying?

Email Ingestion

- Forward or BCC emails and attachments to EFC

Update Existing Case 2018002001 Stanley James Hudson (987654002)

CASE DEMOGRAPHICS CONTACT INCIDENT **EFC** ASSIGNMENT RESOLUTION ACTIONS TASKS NOTES OTHER

[Copy case email address to clipboard](#) [Copy File ID email address to clipboard](#)

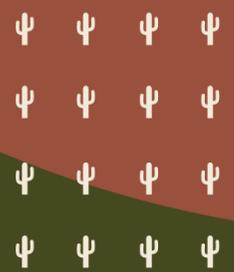
These files are attached to everyone in the case

There is no incident report in this case. Add one here →

No file selected.

File	File name	Size	Date added	Delete?
------	-----------	------	------------	---------

Attach more files to entire case No file selected.



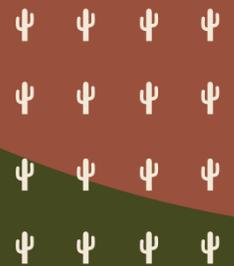
Timeline

- Provides a visual, linear progression of case/file

- Includes

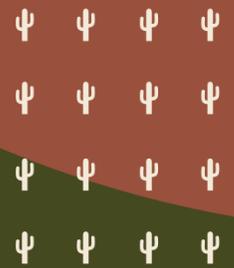
- Milestones
- Individual Notes
- Dates
- Completed Tasks

- Letters / Documents in EFC
- Status changes
- Supportive Measures / Interim Actions
- Sanctions



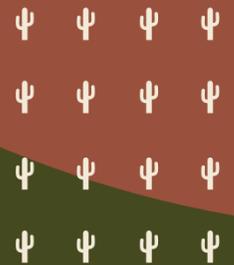
Timeline

- From where can you generate it?
 - *Other* Tab on Update Existing Case screen
 - Quick link on post commit changes screen from UEC
 - Find Case
 - Logs screen



Analytics

- 106 – Title IX Comprehensive Report
- 107 – Title IX Snapshot Report
- 108 – Title IX Comprehensive Report by User
- 109 – Title IX Snapshot Report by User
- 88 – Tags Overview
- 155 – Minutes Spent on Files by Category
- 156 – Minutes Spent by Category and Staff
- 191 – Cases with Milestones

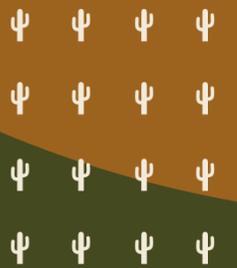




Questions?



Thank You!



Please complete the
evaluation for this program,
found in Guidebook, to help
us plan for future MaxFests.



NEVADA STATE
UNIVERSITY



Maximizing Maxient on your Campus: Navigating Past Challenges and Creating Academic Buy-In

Presented at MaxFest 2024 by

Griffen Farrar Associate Dean of Students and

Dr. Diane Carrasco-Jaquez Associate Dean of Engagement

Who are we?



Griffen Farrar (he/him)
Associate Dean of Students
8 months at NSU
Used Maxient as an RC at
University of Wyoming
Chief Conduct Officer at NSU



Dr. Diane Carrasco-Jaquez
(she/her/ella)
Associate Dean of Engagement
2 years at NSU
Used Maxient in previous roles
Faculty & Student Affairs in School of
Liberal Arts, Sciences, & Business

Learning Outcomes

1

Learn about NSU's journey to our current standard and our path forward

2

Understand tangible steps to develop relationships with Academic Partners

3

Identify potential pitfalls that should be addressed



Nevada State University (formerly College)

Established 2002

Became University 2023

No formal conduct process.

No staff formally trained in conduct.

Conduct concerns handled by numerous different offices.

No standard data retention process.

- When faculty/staff with conduct information left, data was lost.



The Need for Change

- Lack of data retention
- Chasing records
- Working in silos
- Campus Conduct & Safety Report



CONDUCT & SAFETY

FINDINGS REPORT

Prepared for NS Executive Team | March 2023



INTERNAL USE ONLY

2023 CONDUCT & SAFETY FINDINGS REPORT

EXECUTIVE SUMMARY	DETAILED FINDINGS			RECOMMENDATIONS
	CONDUCT	SAFETY	EXISTING PROCESSES	
4 Introduction	14 Historical Trends	21 Historical Trends	29 Student Conduct Reporting and Response	35 All Areas
5 Key Findings	15 Student Conduct	23 Campus Safety	30 Discriminatory Conduct	37 Student Conduct
6 People	19 Discriminatory Conduct	25 Public Safety	31 Police Services	38 Discriminatory Conduct
7 Methodology		27 Risk Management & Safety	32 Campus and Public Safety	39 Campus Safety
8 Framework			33 Bodily Injury and Property Incident	40 Public Safety
9 Definitions				41 Risk Management & Safety
11 Recommendations Checklist				
3	13	20	28	34



Think-Ink-Share

- What areas do you see as working in silos?
- Which key stakeholders will need to be involved in breaking down silos?
- How often does your leadership discuss student conduct among units?



Building Bridges

- LASB left out
- Honor the history and move forward
- Collaboration with faculty
- Collaboration with student affairs
- Conduct Community monthly check-in



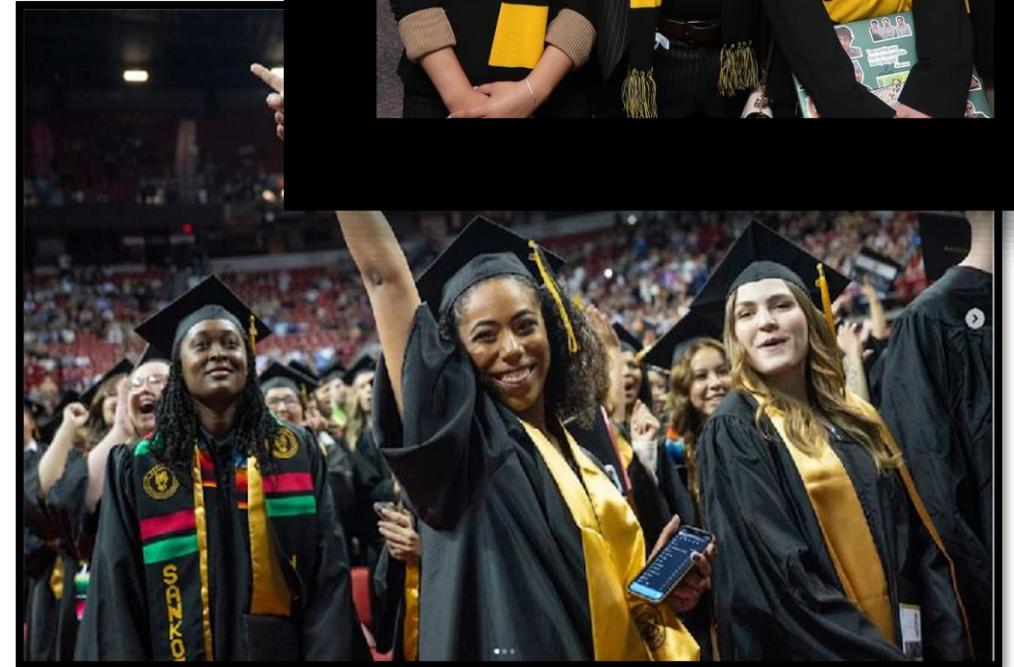
Think-Ink-Share

- What are the concerns that faculty are sharing surrounding conduct?
- Which key faculty groups should you bring into the conversation?
- Does your school have on-going collaborative efforts between Student Affairs and Academic Affairs?
- What has worked well? What has not worked well?



Building Out Maxient Training

- Cannot be One Size Fits All
- Start Small - Work Towards Small Victories
- NSHE Conduct Boards
- Good Cross Training
- Bring Maxient out if possible
- Get in front of Faculty at Orientation and Welcome Week for Faculty



What would we do differently?

- Don't pay and not use!
- Ensure a team is trained. Cannot do it all alone.
- You do not have to do everything at once.
- Build buy in early and continue often.
 - This must be at all levels, not just leadership





CONNECT WITH US

Griffen Farrar

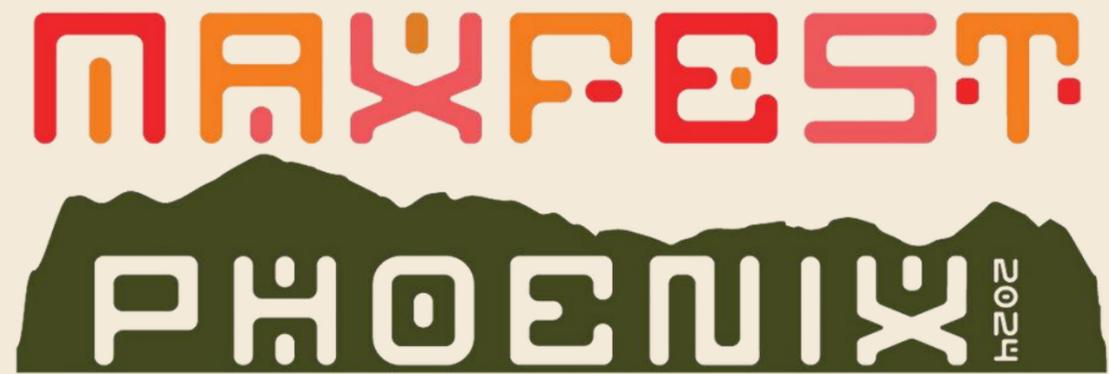
griffen.farrar@nevadastate.edu

Dr. Diane Carrasco-Jaquez

diane.carrasco-jaquez@nevadastate.edu

nevadastate.edu





Basic Needs in Maxient



Turi Watson
Client Success Advisor

Basic Needs Elements

- IR Layout to capture requests
- Manage Case Type
 - Spoiler alert: This is a new function!
- Issues
- Actions
- Letters

IR Layouts – Some Examples

- Woodrow College (Maxient): Basic Needs Request
 - https://cm.maxient.com/reportingform.php?WoodrowCollege&layout_id=70
- Ball State: Basic Needs Assistance Form
 - https://cm.maxient.com/reportingform.php?BallStateUniv&layout_id=30
- College of the Mainland: Student Basic Needs Referral
 - https://cm.maxient.com/reportingform.php?CollegeoftheMainland&layout_id=45
- Pensacola State College: Basic Needs Emergency Grant Application
 - https://cm.maxient.com/reportingform.php?CollegeoftheMainland&layout_id=45

Configuration Screen Updates

- CC Recipients
- Hearing Officer Titles
 - Required for assigning cases to users or creating routing rules
- Status

Manage Case Types

- Terminology – Adjusts how certain elements will be named

Basic Needs

Values highlighted in green indicate they have been modified from the default values.

Terminology Lists Fields to Hide or Repurpose

Maxient Variable	Field	Customized Name	Visibility
ACADEMIC_ADVISOR	Academic Advisor	Academic Advisor	<input type="checkbox"/> Hide
ACADEMIC_MAJOR	Academic Major	Academic Major	<input type="checkbox"/> Hide
MEM_ATHLETICS_SPORT	Athletic Affiliation	Athletic Affl.	<input type="checkbox"/> Hide
CLERY_RATIONALE	Clery Rationale	Clery Rationale	<input checked="" type="checkbox"/> Hidden
CLERY_REPORTABILITY	Clery Reportability	Clery Reportability	<input checked="" type="checkbox"/> Hidden
GPA_CUME	GPA Cumulative (at case creation)	GPA Cumulative (at case creation)	<input type="checkbox"/> Hide
GPA_LAST_TERM	GPA Previous Term (before case)	GPA Previous Term (before case)	<input type="checkbox"/> Hide

Manage Case Types

- Lists – Limits options to your specific case type

Basic Needs

Values highlighted in green indicate they have been modified from the default values.

Terminology **Lists** Fields to Hide or Repurpose

Item	Available Options
Appeal Statuses <i>20 character limit per option</i>	N/A
Classifications <i>30 character limit per option</i>	Freshman; Sophomore; Junior; Senior; Graduate
Deadline Offset Default	14
Findings <i>30 character limit per option</i>	Granted; Denied

Manage Case Types

- Lists – Limits options to your specific case type

<p>Incident Locations <i>100 character limit per option</i></p>	<p>On campus; Breese Hall; OJA (failure to comply); Drug Testing Agency; Student Union; Here & There; Library; Stadium; Wellness and Fitness Center; Computing Network; On campus classroom; On campus administration building; On campus parking lot or street; On campus - other; North Quad; Patterson Hall; Simmons Tower; Tucker House; Williams College; Capstone House</p>
<p>Milestones <i>255 character limit per option</i></p>	<p>Request Received; Request Reviewed; Request Managed; Referrals Provided</p>
<p>Note Categories <i>100 character limit per option</i></p>	<p>Communication; General Information; Meeting; Other Contact; Referral; Walk-In</p>

Manage Case Types

- Lists – Limits options to your specific case type

Referral Sources <i>50 character limit per option</i>	Dean of Students Office; Housing and Residence Life; Public Safety; Athletics; Faculty; Administration; Student; Community Member; Other
Resolution Types <i>50 character limit per option</i>	Decision
Roles <i>30 character limit per option</i>	Requester
Tags <i>100 character limit per option</i>	N/A

Manage Case Types

- Fields – To be hidden or repurposed

Basic Needs

Values highlighted in green indicate they have been modified from the default values.

Terminology Lists **Fields to Hide or Repurpose**

Maxient Variable	Field	Customized Name	Visibility
ACADEMIC_ADVISOR	Academic Advisor	Academic Advisor	<input type="checkbox"/> Hide
ACADEMIC_MAJOR	Academic Major	Academic Major	<input type="checkbox"/> Hide
MEM_ATHLETICS_SPORT	Athletic Affiliation	Athletic Affl.	<input type="checkbox"/> Hide
CLERY_RATIONALE	Clery Rationale	Clery Rationale	<input checked="" type="checkbox"/> Hidden
CLERY_REPORTABILITY	Clery Reportability	Clery Reportability	<input checked="" type="checkbox"/> Hidden
GPA_CUME	GPA Cumulative (at case creation)	GPA Cumulative (at case creation)	<input type="checkbox"/> Hide
GPA_LAST_TERM	GPA Previous Term (before case)	GPA Previous Term (before case)	<input type="checkbox"/> Hide



ISSUES AND ACTIONS



ISSUES

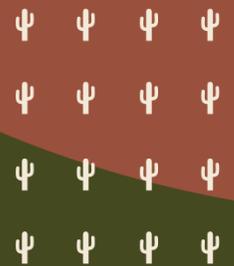
- These are the reasons why someone is seeing assistance
- Being more specific about the issues will allow you to capture better data in the long run
- These are added via the Manage Charges Screen



Edit	Basic Needs	Academic Material Needs
Edit	Basic Needs	Childcare Needs
Edit	Basic Needs	Clothing Needs
Edit	Basic Needs	Food Insecurity
Edit	Basic Needs	Housing Insecurity
Edit	Basic Needs	Medical Expenses
Edit	Basic Needs	Transportation Needs
Edit	Basic Needs	Utility Needs

Actions

- These are the resources that the institution can provide in response to a request
- You may just have one option (Emergency Funding) or you could have several options
- You can request these via the Manage Sanctions screen



Edit	Basic Needs	Emergency Funding	EMERGENCY_FUND	0	0	Yes	Yes	No
Edit	Basic Needs	Food Pantry	FOOD_PANTRY	1	1	Yes	Yes	No
Edit	Basic Needs	Transportation Voucher	TRANSPORTATION_VOUCHER	2	2	Yes	Yes	No

Letters



At the very least, you will want to create letters that communicate the granting of assistance or the denial of assistance, especially if you provide grounds for the denial.



You may also want to create letters requesting additional information or documentation and one for providing referrals to other resources

Basic Needs Workflow

Receive IR

This can be set up to be completed by individual request services or by someone else on their behalf.

01



Communicate

If you need any additional information, communicate with individual via a letter template.

03



02



Create Case

Use the case type, hearing officer titles, and issues to create your case.

04



Complete CRF

The Case Resolution Form is the most efficient means to capture the information about the assistance provided to the individual.

05

Update/Close Case

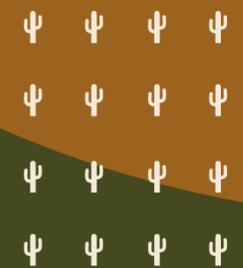
Add notes, add documentation, etc. as necessary and close case.



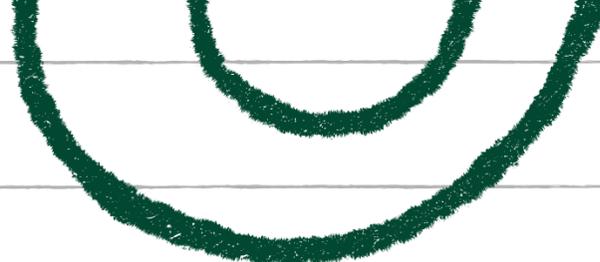
Questions?



Thank You!

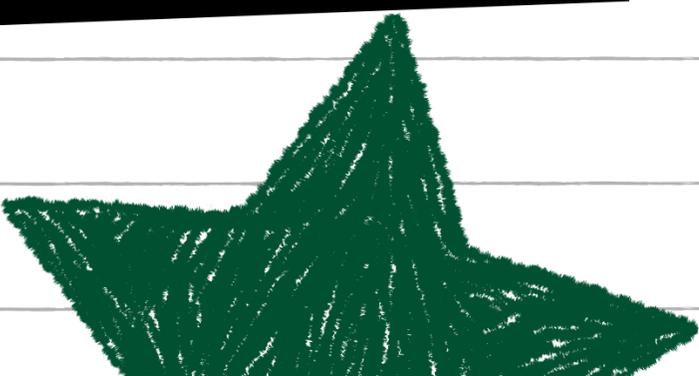
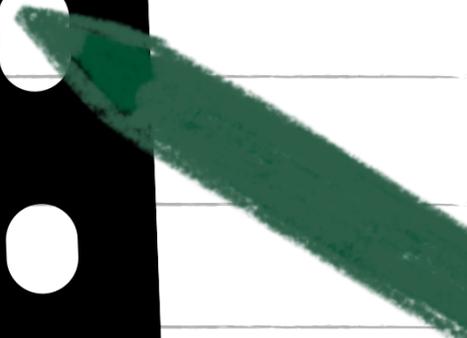


Please complete the evaluation
for this program, found in
Guidebook, to help us plan for
future MaxFests.



MAXIMIZING STUDENT SUCCESS

***INTEGRATING MAXIEN
WITH THE MĀNOA BASIC
NEEDS FUND FOR
HOLISTIC SUPPORT***





Wiliama Sanchez (he/him/his)
Student Success Operations Manager
University of Hawai'i at Mānoa



Impact in Action: Empowering students with resources for achievement at University of ...



Share

Impact in Action



Empowering students with resources for **achievement**



Watch on  YouTube

HOW CAN TECHNOLOGY ENHANCE STUDENT SUPPORT?

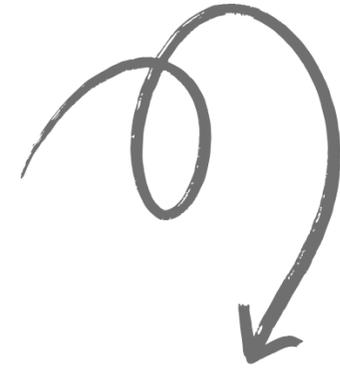
Integrating Maxient with the Mānoa Basic Needs Fund provides a holistic approach to student success.

By combining Maxient's reporting capabilities with the support provided by the Mānoa Basic Needs Fund.





SUCCESS INTEGRATION



Maxient

Maxient plays a crucial role in streamlining student success initiatives through outreach efforts

UH Foundation

UH Foundation engages donors to build up our accounts

Basic Needs Navigators

Enhancing student welfare through holistic support services as case managers from our MSW programs

OVPSS

OVPSS works at the Executive Leadership Level addressing University-wide advocacy

**STUDENT
SUCCESS STORIES**



MāNOA BASIC NEEDS EMERGENCY GRANT

CASE FLOW

ELIGIBILITY CHECK

01

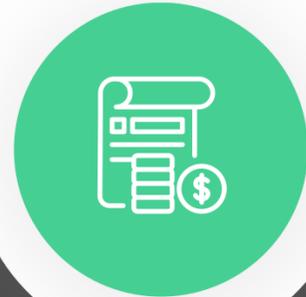
Case Manager receives applications conducts an initial review, verifies eligibility for the emergency fund



APPLICATION SUBMISSION

Student identifies a need and applies for Mānoa Basic Needs Emergency Fund through Basic Needs website

02



OUTREACH MEETING

Case Manager sets up a meeting with student to review application, receive additional documentation and process logistics.

03



DECISION MAKING

Final review conducted by Dean of Students to make decision. Letter generated to notify student cost and next steps to process check.

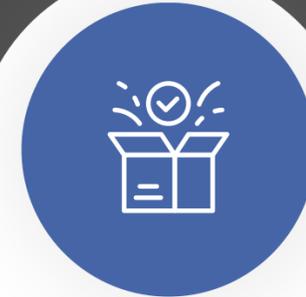


04

CHECK NOTIFICATION

Student fills out link information in approval letter that directs information to UH Foundation

05

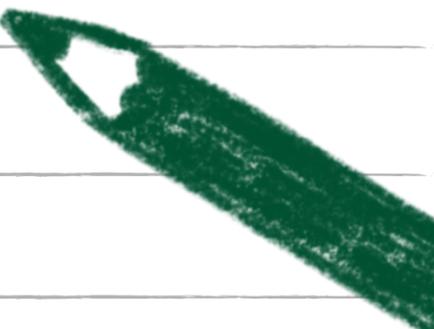
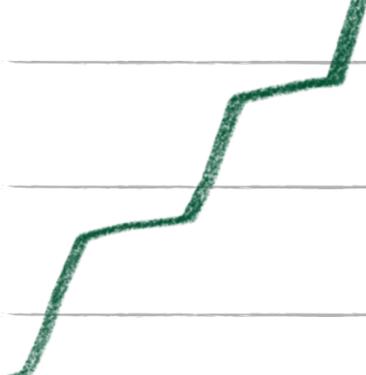


06

CASE CLOSURE

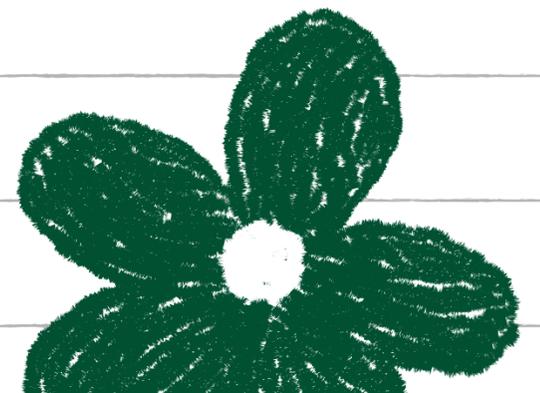
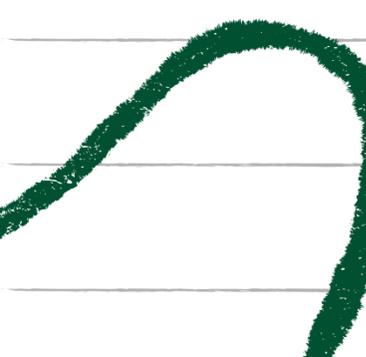
Case is reviewed by Case Manager for further follow up on resources and case is closed out with notes.





MAXIENT'S VERSATILITY & RECOMMENDATIONS

- Insights into Maxient's capacity for customization and scalability
- Practical recommendations for institutions looking to use Maxient for similar applications





Questions?

Email: wiliama@hawaii.edu

Phone: (808) 956-3290



UNIVERSITY of HAWAI'I° at MĀNOA

DIVISION OF STUDENT SUCCESS

Molehills from Mountains

Leveraging Maxient to support work at a high
volume, multicampus institution



Molehills from Mountains

We work in an increasingly complicated field in which campuses continue to grow, institutions are becoming more complex, and information is sought more frequently on a shorter timeline. This presentation will delve into how Penn State University has used Maxient to help organize chaos in a high-volume environment encompassing 23 physical campuses. We will share the methods used in Maxient to help organize our processes and provide consistent and equitable practices across a large institution.

Introductions

Andrew Mitchell

Maxient Case Coordinator

Office of Student Accountability and Conflict Response

Penn State University

ajm652@psu.edu

Context - PSU (Fall 2023)

- ▶ Total Student Population - 87,903
 - ▶ Undergraduate - 73,250
 - ▶ Graduate - 13,091
 - ▶ Medical - 642
 - ▶ Law - 920
- ▶ 23 Campuses
 - ▶ University Park - 49,135
 - ▶ World Campus - 13,564
 - ▶ Commonwealth Campuses - 23,682
 - ▶ From Harrisburg at 4,651 to Shenango at 332
- ▶ Started using Maxient in the Fall 2017 or Spring 2018



Multiple Offices in Maxient

- ▶ Office of Student Accountability and Conflict Response/Office of Residence Life - 6,480 cases*
 - ▶ Includes student conduct records, academic misconduct, organizational misconduct, conduct review, etc.
 - ▶ 165 members
- ▶ Student Care and Advocacy - 4,478 cases*
 - ▶ Includes CARE team files, basic needs requests, respondent support services, etc.
 - ▶ 168 members
- ▶ Office of Sexual Misconduct Reporting and Response - 1828 cases*
 - ▶ Title IX related records
 - ▶ 71 members
- ▶ Behavioral Threat Management Team - 221 cases*
 - ▶ 202 members
- ▶ 12,794 total incident reports of all types

*cases created from Summer 2023-Spring 2024

Offices and Campuses

- ▶ Offices support work at campuses but do not directly supervise staff
- ▶ For instance, we have 1 Code of Conduct for all campuses and each campus have staff that are trained in facilitating the conduct process
- ▶ Staff at campuses are not typically directly supervised by University Park staff
- ▶ Each office has its own incident reports that are used regardless of campus



Access

- ▶ Access restriction is based on case type
- ▶ Utilize an inverted funnel where additional access can be granted
 - ▶ The broadest conduct group provides all letters, charges/issues, sanctions/actions, letters that would be needed for individual conduct cases
 - ▶ A subset of users also get Organizational Conduct access which provides additional elements specific to that case type
- ▶ There are “superusers” who have access to view cases across case types (directors/supervisors, lead BTMT or CARE team staff)

Organizing Chaos

In a context in which there are over 150 staff involved in a conduct process, with just shy of 100,000 students spread across 23 campuses, how do we use 1 externally facing form to get a student to the right staff member in the right office in a quick way?

The importance of Nomenclature

- ▶ Consistent naming of offices and incident locations can help get things to the right place quickly
- ▶ What incident locations do you include and not include?
 - ▶ We do not include every single building
 - ▶ We do include every residence hall
- ▶ Naming conventions
 - ▶ We always use [campus] - [incident location]
 - ▶ Tip - use of a unique divider in incident locations, hearing officer titles, etc. makes it easy to separate out in excel

Incident Reports

We organize reports by case type/office - not by campuses

Each office uses a different externally facing report

Use of incident locations to build routing rules

- Also use nature and urgency to help flag or route certain reports differently
- We have 1 report that our University Police use to report all incidents to Student Affairs and use these fields to help which offices reports should go to

Workflow - incident reports

- ▶ Each office/record type has its own process
- ▶ Used regardless of campus
 - ▶ Routing rules help connect information to campuses quickly
- ▶ 2 general types of incident flows
 - ▶ Centralized - all reports come to one location for cases to be created and assigned out
 - ▶ De-centralized - all reports are routed to individuals/campuses for case creation
- ▶ Office/records have their own process
- ▶ Use of common language in fields vs. office specific language

Important fields

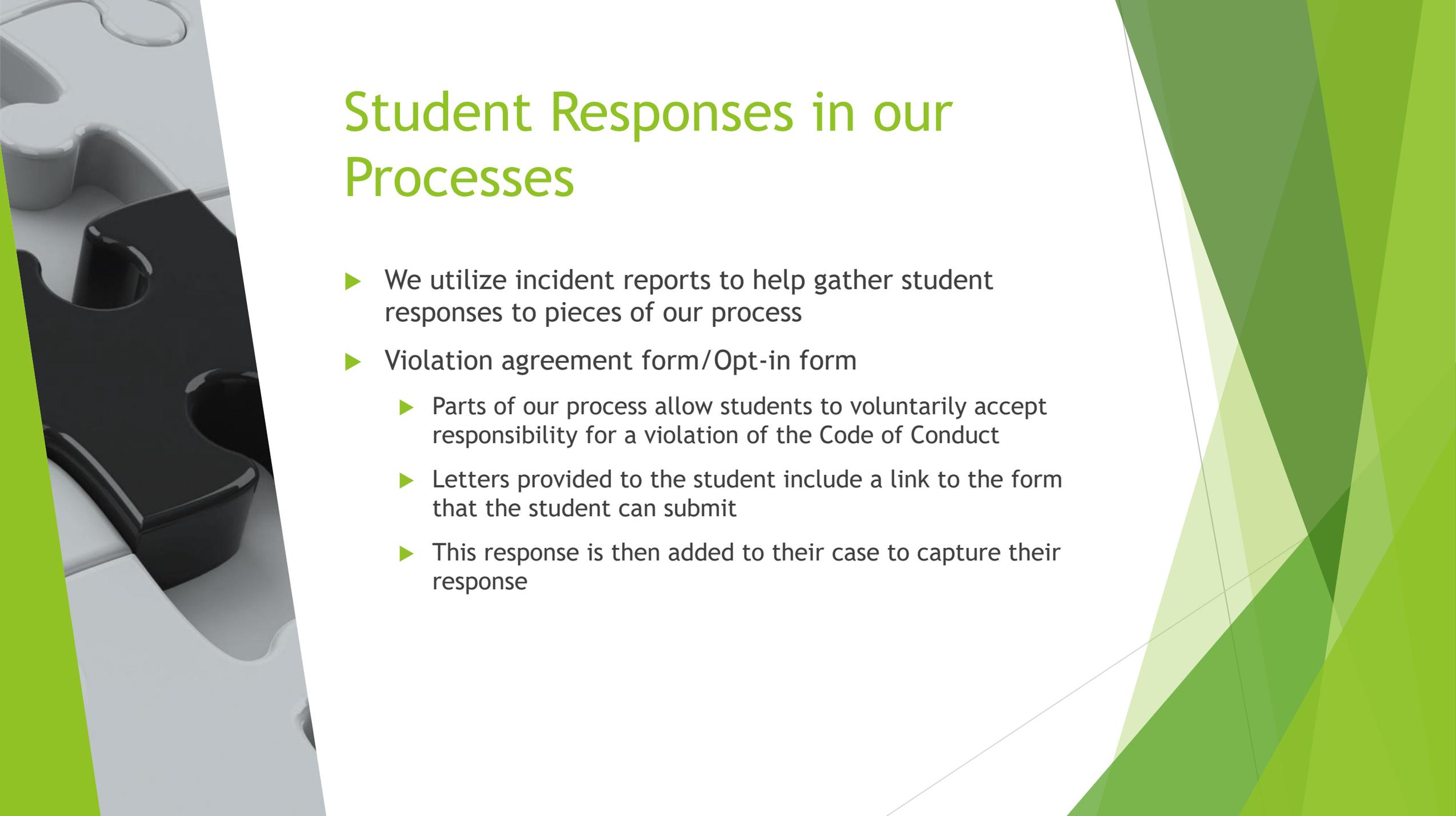
- ▶ Using fields to help identify which office a student is working with or which campus a student may be connected to
- ▶ Home Office fields - incorporating campuses into home office structure
 - ▶ Office of Student Accountability and Conflict Response
 - ▶ Penn State Shenango
- ▶ Home Office allows a quick reference as to who is providing primary support
- ▶ Can be used when running reports to help with that office's specific case management
- ▶ Custom field that notes at which campus a student is enrolled

Important fields

- ▶ Identify the fields that will quickly highlight workflow/process/case management issues
 - ▶ We use the Incident Summary field to pull in a synopsis of the incident in our Notice of Allegation letters
 - ▶ No information in that field means that either there is a process issue or that notice has not been provided to the student
- ▶ Dates can be helpful to also identify what cases may need attention
 - ▶ In our conduct process, sorting by “Case status -> Hearing date -> Appointment date -> Case created date” can quickly sort out cases based on where they are in the process
- ▶ Consider how you use different date fields to help track cases - using “Next Deadline” to identify the last time a case was discussed at a CARE/BIT as an example

Task Templates

- ▶ Use of task templates to help provide consistency across large areas
- ▶ Task templates also help communicate information across campuses
 - ▶ OSACR completes all requests to add notations to student transcripts
 - ▶ Task templates allow for staff to add the appropriate task without needing to reassign a case
- ▶ Collaborates fields also help when support is being provided
 - ▶ Often used in complex situations and/or when a case is transitioning to an administrative conference



Student Responses in our Processes

- ▶ We utilize incident reports to help gather student responses to pieces of our process
- ▶ Violation agreement form/Opt-in form
 - ▶ Parts of our process allow students to voluntarily accept responsibility for a violation of the Code of Conduct
 - ▶ Letters provided to the student include a link to the form that the student can submit
 - ▶ This response is then added to their case to capture their response

Using Analytics

- ▶ Developing reports that utilize custom fields
- ▶ Identify what is important to know for information gathering
 - ▶ How important is incident location?
 - ▶ Do you have multiple offices that are involved in processes?
- ▶ Determine what fields are important for assess process efficacy
 - ▶ What will help you know what situations need attention?
- ▶ How do you share information with others involved in the process?
- ▶ Using Custom Analytics - it's not as intimidating as it may look!

Compliance responsibilities

- ▶ Who is responsible for gathering compliance information? (like Clery)
- ▶ Is this information shared centrally or de-centralized?
- ▶ Each PSU campus has its own annual security report, but we provide information for them centrally

Analytics and Excel

- ▶ Using Excel functions provides great flexibility in assessing information or cross-referencing large amounts of information
- ▶ Excel functions that are helpful:
 - ▶ Pivot tables - being able to review large sets of information quickly
 - ▶ Vlookup - cross referencing large amounts of information
 - ▶ Concatenate - taking information (like ID numbers) and quickly formatting it for custom analytics
 - ▶ Text to columns - breaking out information in a cell into multiple columns

Example - Family Notifications

- ▶ We wanted to double check to make sure that family notifications occurred for cases that needed them
- ▶ Pulled 2 reports
 - ▶ All cases of a certain type where notification was marked as “Yes,” or the outcome would mean that it should happen
 - ▶ All memos sent out for certain case types, then only kept the information related to family notifications
- ▶ Used Vlookup set up on the report with the cases family notification should have happened checking the memos report
- ▶ Instantly scalable

VLookup

- ▶ 2 data sets
 - ▶ Cases that should have resulted in a letter
 - ▶ Custom analytics can be used to gather this information
 - ▶ Letters/memos sent
 - ▶ Remove letters that you are not looking for
- ▶ Use the FileID as a common field to connect the two data sets
- ▶ VLookup can then be used on the case data set to identify if a letter was sent

VLookup

- ▶ `=VLOOKUP([FileID cell], [cell range of the letter/memos sent], [#of column from the left you want to populate in cell such as the letter name],)`
- ▶ `=VLOOKUP(A2, unopened!A1:F2092, 5,)`
- ▶ Uses - quickly cross referencing two data sets looking for a specific piece of information

Concatenate

- ▶ Allows for adding characters to information in excel
- ▶ Custom analytics allows for searching based on SID, File IDs, emails, etc. but the information needs to be formatted correctly
 - ▶ SID IN ('SID-1', 'SID-2', 'SID-3'....)
- ▶ Concatenate allows for transforming a list of information into the right formatting that can be copied and pasted into custom analytics
- ▶ =Concatenate(“”, [SID cell number], “”, “,”)
- ▶ Can easily search information given a list of SIDs, emails, etc.

Concatenate

B7 *fx* =CONCATENATE("","A7","","",",")

	A	B	C	D	E
1	SID-1	'SID-1',			
2	SID-2	'SID-2',			
3	SID-3	'SID-3',			
4	SID-4	'SID-4',			
5	SID-5	'SID-5',			
6	SID-6	'SID-6',			
7	SID-7	'SID-7',			

Text to columns

- ▶ Breaking up information in a cell into multiple columns
- ▶ Can be used to separate incident locations to just keep the campus where the incident occurred, or separate out hearing officer titles to focus on campus, etc.

Text to columns

Abington - Residence Hall

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

- Tab
- Semicolon
- Comma
- Space
- Other: -

Treat consecutive delimiters as one

Text qualifier: " [v]

Data preview

Abington	Residence Hall
Abington	Parking Lot
Abington	Student Union
University Park	On campus
University Park	Off campus

Sheet1

Cancel < Back Next > Finish

Lessons Learned

- ▶ Nomenclature!
 - ▶ Consistency in how you name things makes running analytics, assessing, sorting information all much easier
 - ▶ Especially at a multi-campus institution, consistent naming makes gathering and reviewing information much easier
- ▶ Hearing officer titles
 - ▶ Use titles associated with role, not position
 - ▶ Positions can change over time
 - ▶ Include campus as part of the title in a consistent way

Lessons Learned

- ▶ Utilizing custom fields
 - ▶ Use your custom fields!
 - ▶ Include the student's campus at multi-campus institutions
 - ▶ Custom fields can be used for more than demographic information
 - ▶ We have an import data stream for a common sanction that is assigned to help with tracking
 - ▶ Our data stream includes all current students but also students who were registered for previous or future semesters. We use a custom field to communicate if the information being pulled is the current information, past, or future
- ▶ Centralizing vs. Decentralizing responsibilities

Lessons Learned

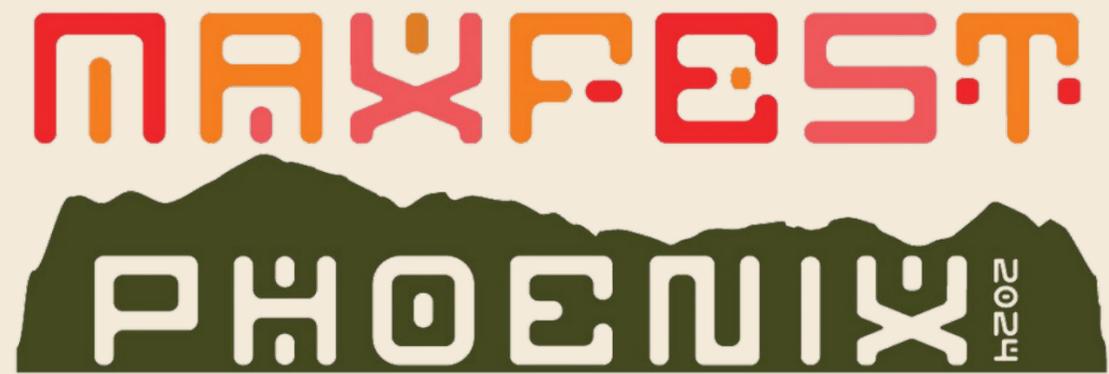
- ▶ Identifying key fields
 - ▶ What are the fields you look for to find cases/situations that are off or need attention?
 - ▶ Build analytics that incorporate those fields
- ▶ Combine analytics with Excel

Lessons Learned

- ▶ Position dedicated to Maxient functions
 - ▶ Access
 - ▶ Information sharing
 - ▶ Ensuring multiple offices can use make use of the system
 - ▶ Prevents inadvertent impacts of one office changing something

Questions?

- ▶ What would you add?



More Than Just Manage Charges

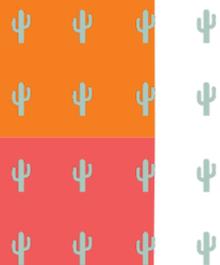
How to Plan for Code Changes in Maxient



Shalin Shah - "Shah"
Senior Client Support Specialist
He/Him/His

Learning Outcomes

- *Know how to add new charges/issues*
- *Understand when to modify charges/issues*
- *Identify when to create new charges/issues and not modify old ones*
- *How not to lose old charges/issues*
- *Understand when to update system configuration on when changing charges/issues*



Potential Pitfalls



Changing charges or issues for cases already resolved



Losing charges/issues needed later for future cases

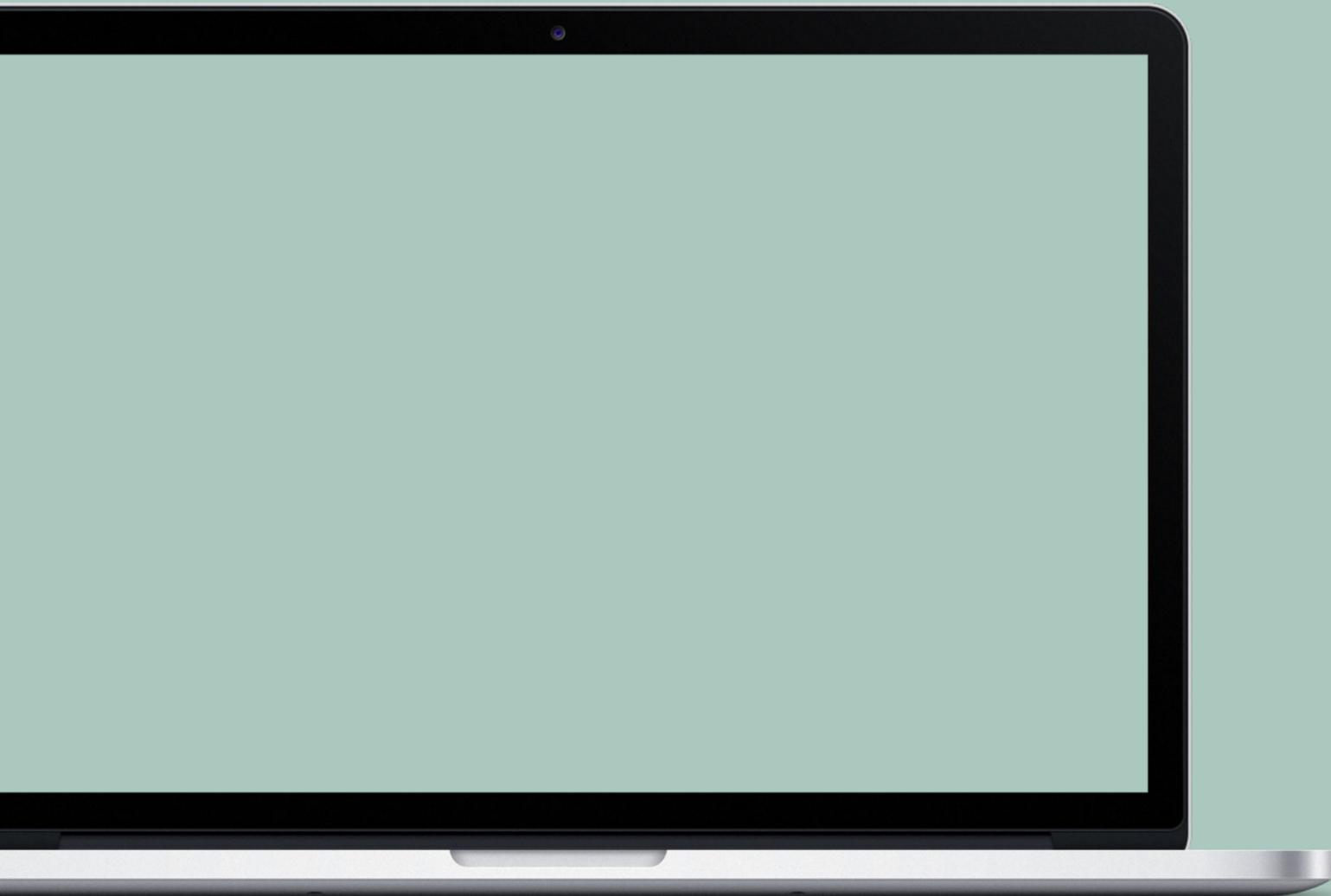


Having inaccurate Clery- and/or Title IX- associated charges



Damaging large amounts of case data quickly

4 TYPES OF CHARGES DURING A CHANGE



CHARGES NEVER
USED AND ARE
GOING AWAY



CHARGES THAT
HAVE BEEN USED
AND ARE GOING
AWAY



CHARGES THAT
HAVE BEEN USED
AND NEED
MODIFICATIONS



CHARGES THAT
ENTIRELY NEW AND
NOT PRESENT IN
YOUR SYSTEM



CHARGES NEVER USED AND ARE GOING AWAY



PSA

IT'S OKAY TO DELETE CHARGES

REPEAT AFTER ME

- *There is no impact on historical cases.*
- *There is no impact on analytics.*
- *It will be saved on the Resolution tab as a "snapshot in time"*
- *You only lose the ability to use the expanded language (e.g. sending letters)*

PSA (2)

WHEN SHOULD I NOT DELETE CHARGES?

- *You still have open cases with those charges or cases pending appeal.*
- *You will need to make a professional judgement on cases with charges that could be reopened and fall under a potentially different policy*

CHARGES NEVER USED AND GOING AWAY (1)

- How do I know I never used a charge?
 - *Manage Charges screen*
 - *'EDIT' the charge in question*
- You do not want to see the red sentence (as displayed)

Manage Charges/Issues > Edit existing

CHARGE/ISSUE TITLE

This is the "short form", used in drop down menus and, optionally, in your letters. It should remain relatively constant from year to year for statistical reporting purposes.

Plagiarism

This charge/issue currently appears in **3** cases.

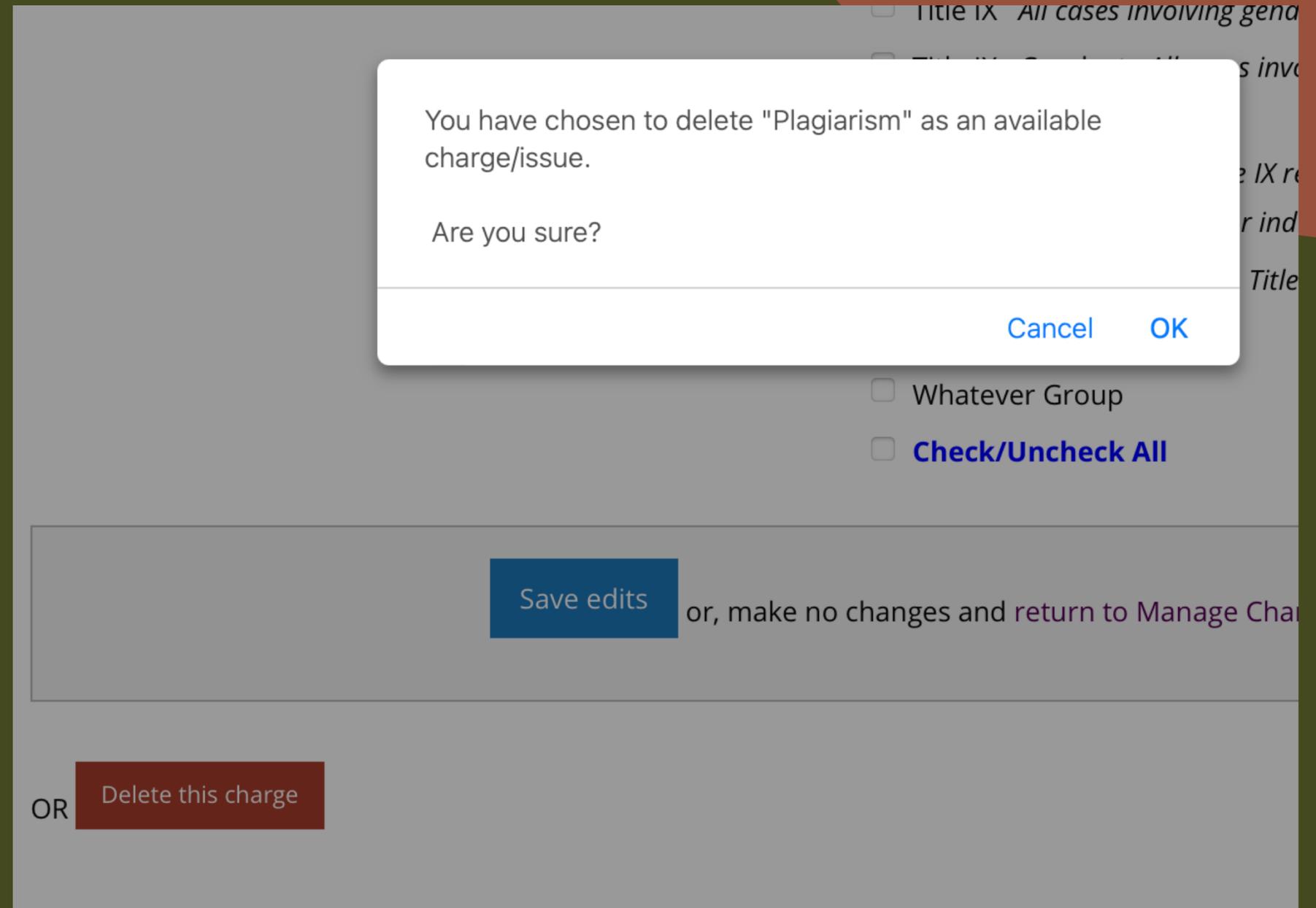
Are you are making a *cosmetic* adjustment to the title above, and wish to ensure this change affects those existing cases? We refer to this as "cascading".

An example of desired cascading would be to correct a charge that was misspelled `Alcho1` when it should have been `Alcohol`. Cascading inappropriately, however, can have devastating and unrecoverable consequences on your existing records. If you are uncertain about whether or not to cascade your change, [Ask for help first](#).

Check here to cascade this adjustment

CHARGES NEVER USED AND GOING AWAY (2)

- How do I delete them?
 - *Manage Charges screen*
 - *'EDIT' the charge in question*
 - *Use the red-orange "DELETE THIS CHARGE" button at the bottom*
 - *Pop-up will appear*
 - *'Select OK' to delete*





CHARGES THAT HAVE BEEN USED AND ARE GOING AWAY



CHARGES USED AND GOING AWAY (1)

- How do I know I never used a charge?
 - *Manage Charges screen*
 - *‘EDIT’ the charge in question*
 - *The gray box will tell you in a red sentence.*
- How do I find these cases?
 - *Use Report 51 – Comprehensive Charges or a Custom Analytic*



Manage Charges/Issues > Edit existing

CHARGE/ISSUE TITLE

This is the "short form", used in drop down menus and, optionally, in your letters. It should remain relatively constant from year to year for statistical reporting purposes.

Plagiarism

This charge/issue currently appears in **3** cases.

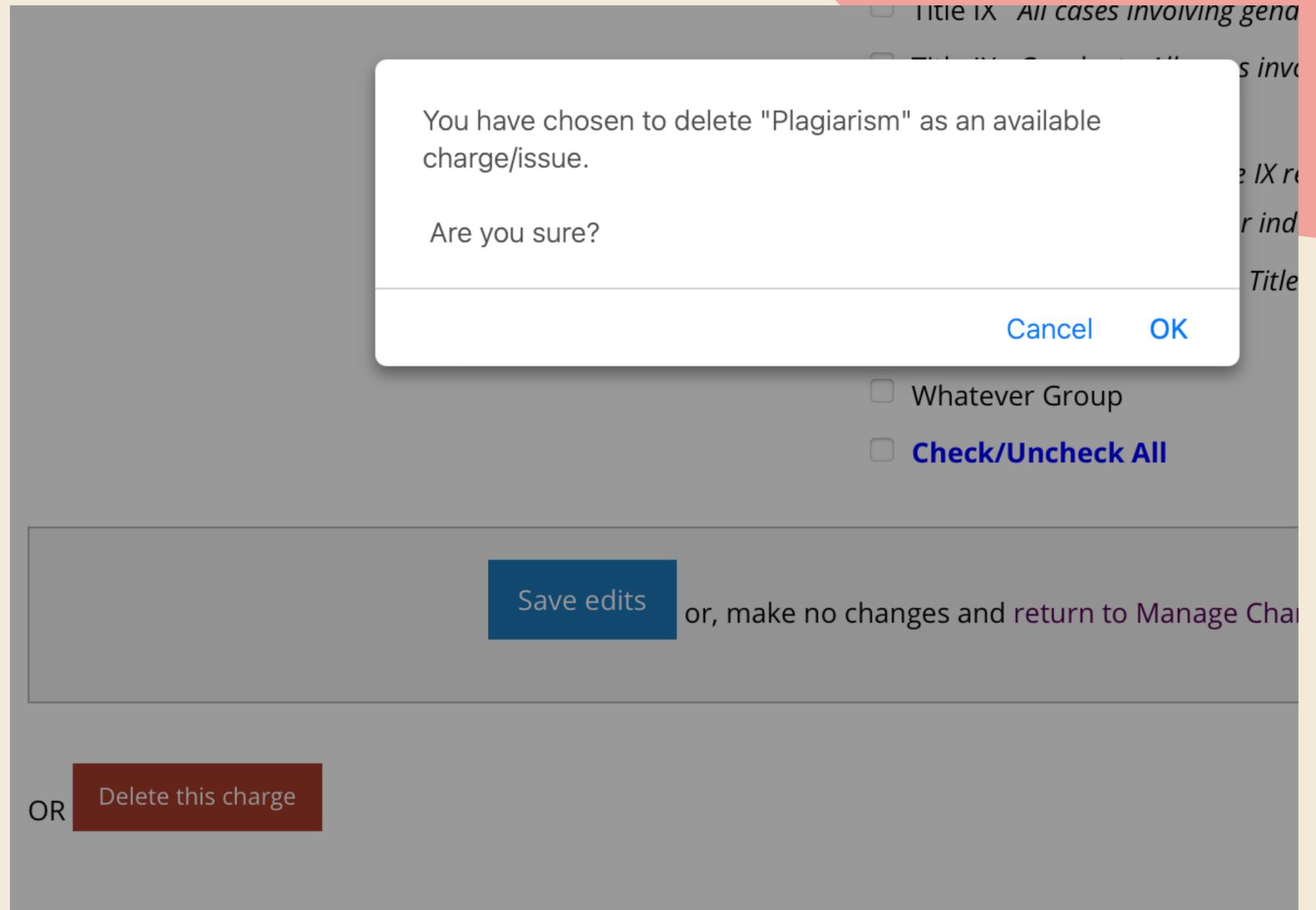
Are you are making a *cosmetic* adjustment to the title above, and wish to ensure this change affects those existing cases? We refer to this as "cascading".

An example of desired cascading would be to correct a charge that was misspelled `Alcho1` when it should have been `Alcohol`. Cascading inappropriately, however, can have devastating and unrecoverable consequences on your existing records. If you are uncertain about whether or not to cascade your change, [Ask for help first.](#)

Check here to cascade this adjustment

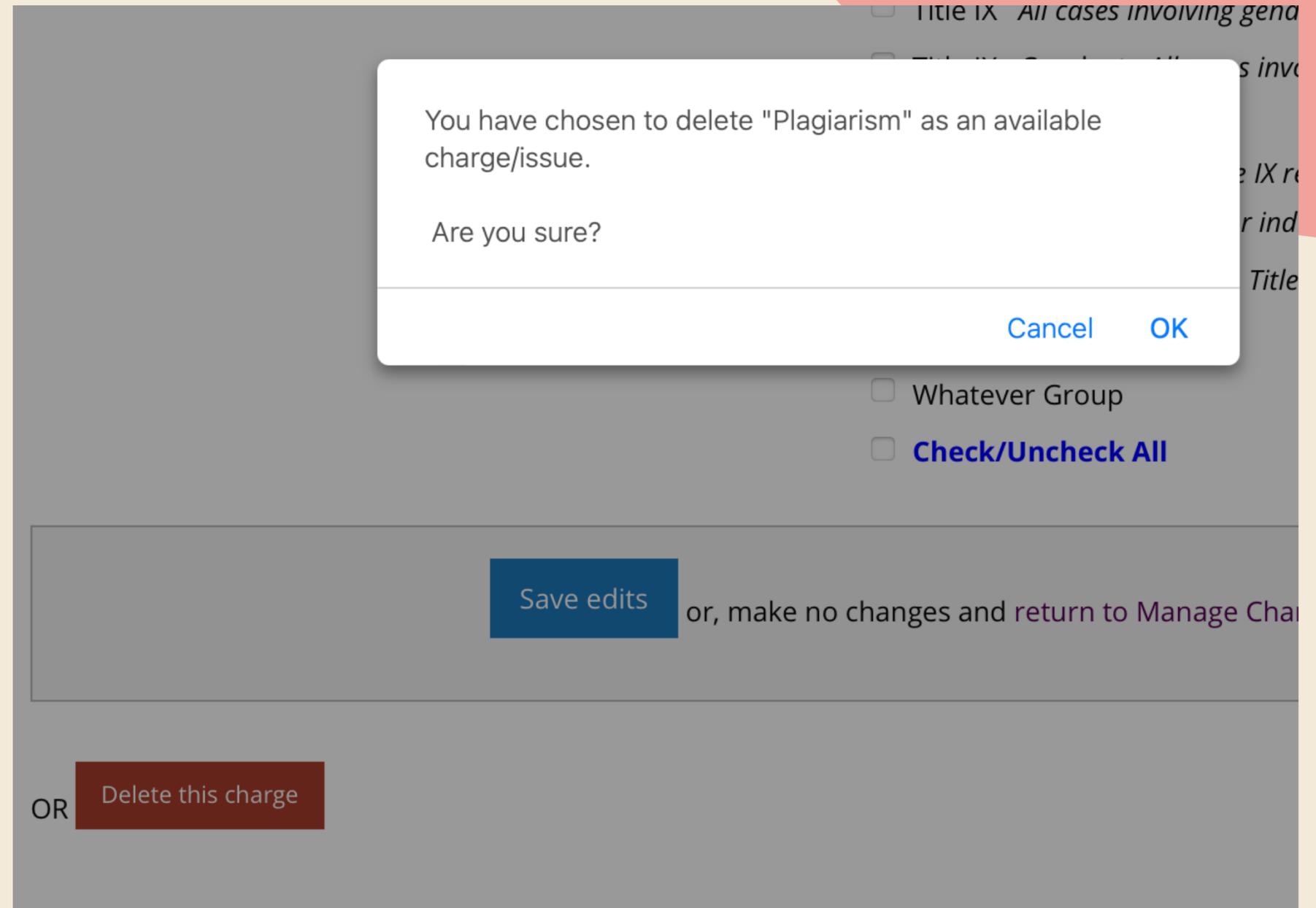
CHARGES USED AND GOING AWAY (2)

- Unpublishing
 - *Recommended immediately.*
 - *Prevents addition in new cases*
 - *Preserves language for use in letters*
- When to delete?
 - *Recommended when no open cases are left.*
 - *Use Report 61*



CHARGES USED AND GOING AWAY (3)

- How do I delete them?
 - *Manage Charges screen*
 - *'EDIT' the charge in question*
 - *Use the red-orange "DELETE THIS CHARGE" button at the bottom*
 - *Pop-up will appear*
 - *"Select OK" to delete*





CHARGES THAT HAVE BEEN USED AND NEED MODIFICATIONS





PSA

You will need to use your professional judgement.
Feel free to reach out to us!



CHARGES USED AND NEEDING MODIFICATIONS(1)

- If the policy is largely the same, you can simply change the title.
 - *This will change the title in future cases BUT NOT existing cases.*
- What if the new policy has additional elements but it has the same name?
 - *See Cascade Slide*

Manage Charges/Issues > Edit existing

CHARGE/ISSUE TITLE
This is the "short form", used in drop down menus and, optionally, in your letters. It should remain relatively constant from year to year for statistical reporting purposes.

Plagiarism

This charge/issue currently appears in **3** cases.

Are you are making a *cosmetic* adjustment to the title above, and wish to ensure this change affects those existing cases? We refer to this as "cascading".

An example of desired cascading would be to correct a charge that was misspelled `Alcho1` when it should have been `Alcohol`. Cascading inappropriately, however, can have devastating and unrecoverable consequences on your existing records. If you are uncertain about whether or not to cascade your change, [Ask for help first](#).

Check here to cascade this adjustment



CASCADING

What if I need to keep the charge unpublished but need a variant?

- *When making changes to existing charges, you will see a box under the Charge Title that gives you the option to make a "cosmetic" change, such as correcting a spelling error, and "cascade" it through all instances where that Charge already appears in existing cases.*

Are you are making a *cosmetic* adjustment to the title above, and wish to ensure this change affects those existing cases? We refer to this as "cascading".

An example of desired cascading would be to correct a charge that was misspelled `Alchol` when it should have been `Alcohol`. Cascading inappropriately, however, can have devastating and unrecoverable consequences on your existing records. If you are uncertain about whether or not to cascade your change, [Ask for help](#) first.

Check here to cascade this adjustment

CASCADING EXAMPLES

OLD CHARGES VS NEW CHARGE

Alcohol & Drug Abuse

*Consumption, use,
possession, distribution or
involvement with alcohol,
illegal drugs , or substances,
or presence
when/there/these
substances are being used
or consumed*

Alcohol & Drug Abuse

*Underage consumption, use,
possession, distribution,
manufacture of alcohol,
illegal drugs , or substances
when/where/these
substances are being used
or consumed*

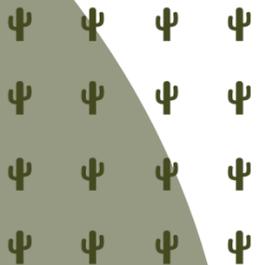
CASCADING IN PRACTICE

HOW YOU MIGHT DO THIS

- Let's do it together (***but don't follow along in your real system!***)
- "Alcohol and Drug Abuse" - as an example.
 - Click "Edit" text next to the "Alcohol and Drug Abuse" charge.
 - Change the charge title to "20-24: Alcohol and Drug Abuse", and then "cascade" those changes back in your system using the gray box
 - This will change the charge title in all your old cases so that it is marked with the year of that code of conduct. Old cases will now read "20-24: Alcohol and Drug Abuse" in the "Charges" section, rather than just "Alcohol and Drug Abuse." This differentiates the old charge from the new/active charge in your analytic reporting and is an easy visual that indicates the handbook year associated with your charges.



CHARGES THAT ENTIRELY NEW AND NOT PRESENT IN YOUR SYSTEM



CHARGES THAT ENTIRELY NEW AND NOT PRESENT

Manage Charges/Issues > Overview

Charge title is the so-called "short form" utilized on dropdown menus. **Expanded language** is an optional "long form" that can be used in letters.

Get CSV File

+ Add Charge

EDIT

CATEGORY



CHARGE TITLE



EXPANDED LANGUAGE



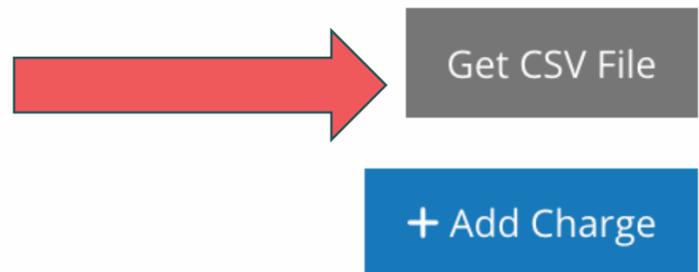
CU
PU

- Use the blue "+ Add Charge" button to add the policy to your system.
 - *Remember! The title cannot be same as an existing policy*
- If you need a new category, simply type a new category into the field. It will be created after saving.
 - *Remember! This will be used by the system to organize charges and will be helpful when assigning permissions.*

NEED TO ADD AN ENTIRE LIST? OR REMOVE?

Manage Charges/Issues > Overview

Charge title is the so-called "short form" utilized on dropdown menus. **Expanded language** is an optional "long form" that can be used in letters.



EDIT	CATEGORY	▲ CHARGE TITLE	▲ EXPANDED LANGUAGE ▼	CU PU
------	----------	----------------	-----------------------	----------

- If you need to update 30+ charges, we can help!
 - *No hard and fast rule, just be aware of the time needed on our end.*
- Use the grey "Get CSV file" button to export your entire list of charges/issues.
 - *Remember! Do not save the exported file as anything other than a csv.*
- We can help batch upload a sheet you modify!



CONFIGURATION AND ANALYTICS AND MANAGE GROUPS



WHAT ABOUT YOUR SYSTEM CONFIGURATION?

- Check specific settings that use Charges/Issues of Concern
 - *These settings are all found on the Configuration Screen.*
 - Clery Associated Charges
 - *Remember! Never delete from this list* but only add! Must be an exact match*
 - Title IX Associated Charges
 - *We recommend acting similarly here to the Clery Associated Charges*

CLERY ASSOCIATED CHARGES

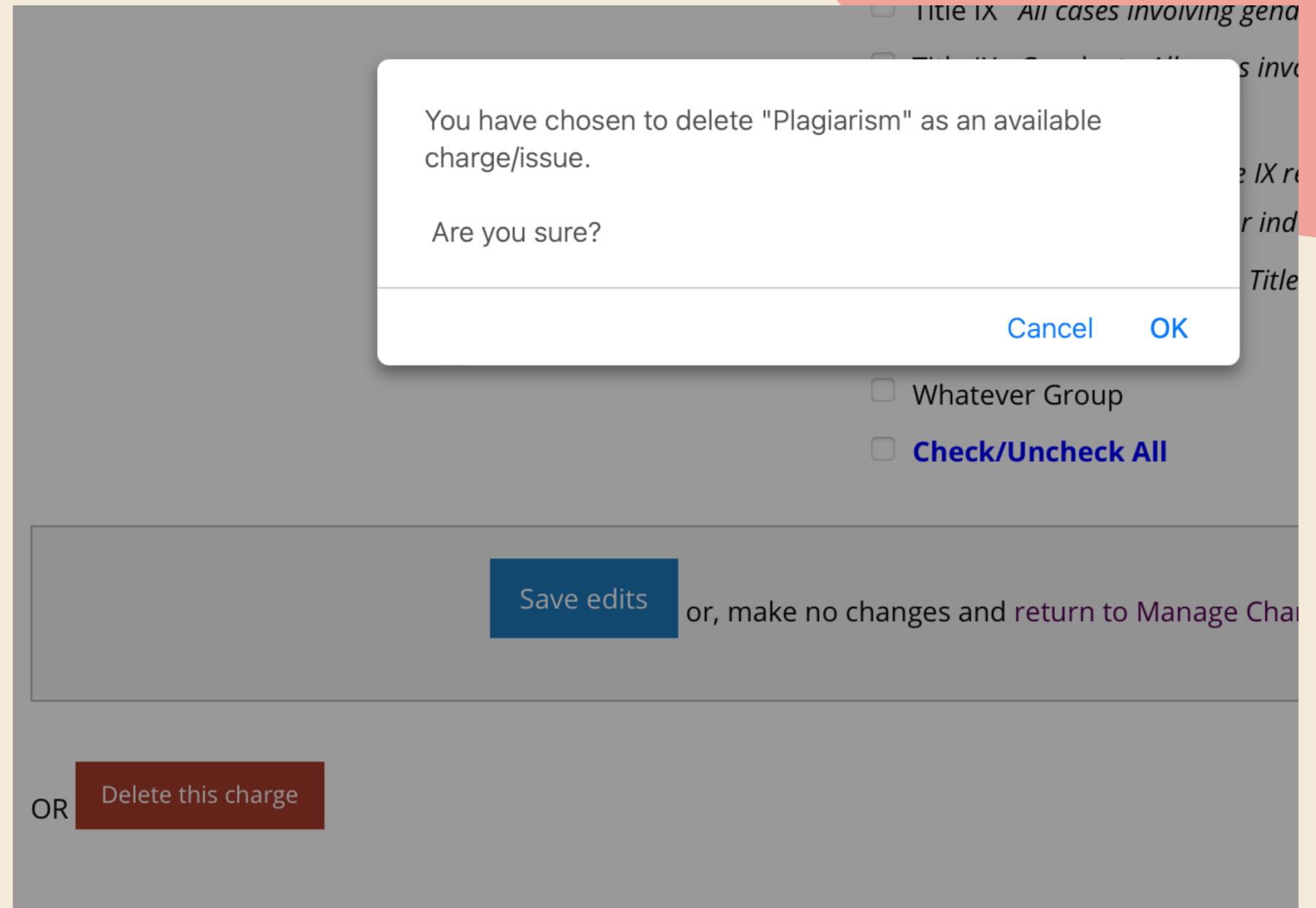
List of charges in your system that, when present in a case, should generally also be in your Clery report. This is used by the Clery Crosscheck report.

TITLE IX ASSOCIATED CHARGES/ISSUES

List of charges/issues in your system that, when present in a case, may indicate relevance for review with respect to Title IX.

WHAT ABOUT ANALYTICS?

- Has Maxient built reports for your institution that are coded to run using specific charges/issues of concern?
 - *These are generally categorized as "Institution-Requested Reports"*
 - *Reach out to Maxient Support to have those updated.*
- Not sure? Check the legend for the report and ask us!



USE MANAGE GROUPS TO ASSIGN ACCESS

- Make it easier to assign access to new charges/issues of concern
- Choose policies by group
 - *Can use the checkbox to select or uncheck by category!*

The screenshot shows a web application interface with a navigation bar at the top containing tabs for 'Analytics', 'Charges/Issues', 'IR Layouts', 'Letters', and 'Forms'. Below the navigation bar is a sub-section labeled 'Sanctions/Actions'. The main content area contains the text: 'Which charges/issues are available for members of this group to select in cases?'. Underneath this text is a section titled 'ACADEMIC INTEGRITY' with a list of five items, each preceded by an unchecked checkbox: 'Cheating', 'Facilitating academic dishonesty', 'Plagiarism', 'Unauthorized Cooperation', and 'Check/Uncheck All Academic Integrity Charges/Issues'. The last item is highlighted in blue.

PSA

IT'S OKAY TO DELETE CHARGES

REPEAT AFTER ME

- *There is no impact on historical cases.*
- *There is no impact on analytics.*
- *It will be saved on the Resolution tab as a "snapshot in time"*
- *You only lose the ability to use the expanded language (e.g. sending letters)*



Questions?



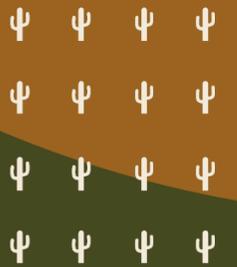
Thank You!

Shalin Shah “Shah”

support@maxient.com

shah@maxient.com

434-295-1748



If you want to schedule with me, please come up and scan my nametag!

Please also complete our survey in Guidebook.