



Your HR Department wants to use MAXIENT?

You won't believe what happens next!



Learning Objectives

- Participants will be able to identify 3 initial steps to allowing an HR department to use Maxient.
- Participants will be able to identify pros and cons of using Maxient for HR related issues.
- Participants will be able to identify security and access controls necessary for having HR use the Maxient system.



Lehigh and Maxient

- **Users since 2011**
- 2017 – 2018 Stats
 - 6289 cases
 - 4851 individual incidents
 - 3980 incident reports (as of May 14)
- 90 + users
- Integrated in to daily Student Affairs tasks.
- Used across Campus
 - Conduct
 - Residence Life
 - Academic Support
 - BIT Team
 - Study Abroad
 - Emergency Loans
 - Academic Petitions
 - Graduate Student Petitions
 - Fraternity and Sorority Affairs
 - Title IX
 - Human Resources



How did this all come about?

- Title IX/Harassment/Retaliation Process
 - One Process for all respondents (different decision makers).
 - Maxient used for student respondents and record keeping for student complainants – **Not for Faculty or Staff.**
 - Request by our Title IX coordinator to combine case management.
 - Need to standardized communication and track progress.



Initial Steps

- Demonstrations to HR Staff
 - Case management (flow chart of process).
 - Letters and other communication.
 - Reporting and Tracking.
 - Watch Lists.
 - *Create Test Case to show to HR staff.*



Stages in Implementation

Stage 1 – Initial Planning

- Working with HR to determine how they want to use Maxient
 - Just title IX?
 - Title IX / Other forms of harassment and retaliation?
 - Other forms of employee management?
 - Progressive discipline
 - Plans for improvement
- Determine Point Person for HR use
 - Who will be the “HR Maxient Administrator.
- Developing Access controls and groups
 - **More Later!**

Stages in Implementation

Stage 2 – Behind the Scenes

- ▶ Working with HR and IT
 - ▶ Field Mapping.
 - ▶ Which fields will mean what for HR? (Example: Advisor in Maxient might be supervisor)
 - ▶ **This is more complex than it seems and will likely be confusing for everyone involved**
 - ▶ Creation of “Charges/Issues”

Alleged misconduct - Inappropriate behaviors	Example: behaviors that conflict with the Principles of Our Equitable Community
Alleged misconduct - Job abandonment	Employee fails to appear or call for a period of several days
Alleged misconduct - Nepotism	Intent to hire or employment of relative (see policy) in immediate department
Alleged misconduct - Policy violation	Actions that are inconsistent with University policy
Alleged misconduct - Threats	Overt or guised threats, spoken or written
Alleged misconduct - Violence	Employee exhibits volatile behaviors toward or in the presence of others or alone

Stages in Implementation

Stage 2 – Behind the Scenes

- Working with HR and IT
 - Creation of Sanctions / Actions

Performance concern (PIP)	HR_PIP
Employee on Disability	HR_DIS
Resignation	HR_RESIGN
Involuntary resignation	HR_INVRESIGN
Separation agreement	HR_SEPAGREE

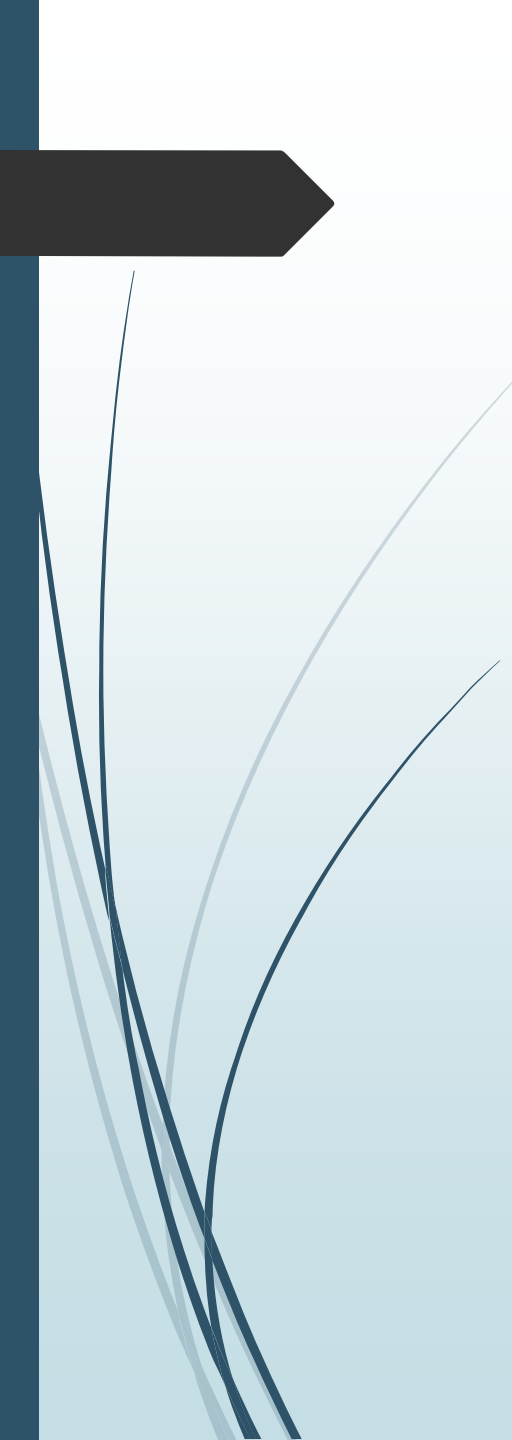
- Integration with Campus Information System (ex: Banner)
 - This will involve working with your IT department to change the information that Maxient pulls in from your campus information system.



Stages in Implementation

Stage 3 – Letters and IR Layouts

- Have HR gather samples of letters they use related to the areas that they are going to use in Maxient.
 - Your Title IX letters will likely be similar if you have a similar system but you may need to create new letters because of the field mapping.
- Have HR gather pamphlets and other materials that they might attach to letters in PDF format (preferably high resolution from the printer).
- Once you have the sample letters you will need to review them with HR to make sure they will work with Maxient. There may be slight changes you need to make.



Stages in Implementation

Stage 3 – Letters and IR Layouts

- Discuss different types of IR's and begin planning for reporting forms to HR
 - Title IX / Harassment / Retaliation Reports.
 - Submission of documentation.
 - Requests for Leaves or other accommodations.
- This is also a good time to begin thinking about what kind of reports your HR department might need.



Managing Groups

- One of the primary concerns that your HR department may have is security of sensitive material.
 - You already do this with your own cases.
 - Somewhere on campus someone besides HR already has access to this information (IT) and it is secure.
 - Maxient has incredibly audit trails that will help if someone does violate access controls
- Create at Least one Access Group for HR cases.
 - You may already have one for Title IX / Harassment Cases.
 - At the outset include yourself of the primary Maxient administrator as there will be times you need to access cases to assist. (This will change.)

Access Levels

- As with any user identify what their needs are and then assign access level.
 - At least one person in your HR area should be a level 4 (After they are trained).
 - ACCESS LEVELS:
 - Level 1 - Complete a CRF, Find cases, Find priors, review and edit IRs assigned to them only. Run analytics for which they are given permission.
 - Level 2 - Same as above
 - Level 3 - Above + open a case, make case updates on the Update Existing Case screen, generate letters, post/delete announcements, view audit trail.
 - Level 4 - Above + view and reassign any IR, create new IR layouts, manipulate IR routing rules, manage letter templates. This is the beginning of our administrative levels.
 - *Level 5 - On-site Database Administrator. All functions including above + manage users, manage groups, manage offices, manage analytics, alter configuration, view usage log, alter sanction templates, alter charges.*



What don't you know that you want to know?

- Questions and Answers
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