# CMS Roles

Just as the jobs themselves have been broken down into discrete tasks, those who perform them are also divided accordingly. There are ***many*** roles within the system that have varying responsibilities, and some of those have configurable tasks all the way down to the conference level. However, roles in the CMS system are not simply collections of system capabilities. They are derived from and map to real world roles outside the concept of CMS. In the process of working with various districts, we've found many instances of work sharing and attempted to adapt the roles in a manner that allows for greater degrees of flexibility, without defeating the purpose of having defined system responsibilities. In simple terms, if you perform a particular function, you'll need to be assigned the role that allows you to perform that function in the system.

Accounts do not exist except within the concept of a role they fulfill. When an account is created, it is created with the initial role assignment (even if that role is as simple as conference member). The roles have the security tokens - the accounts have roles - hence single accounts can be given disparate roles across multiple conferences. For example, a treasurer of one conference may also be the treasurer of another and an intake worker in a centralized dispatch for the Diocese, all managed through a single user login.

Individuals may fulfill different roles within the same or different conferences. In addition, roles are used in some instances, like Express Assistance, to allow access to certain specific system functionality. Some conferences also have special advanced role functionality, where intake workers can assign cases to others, or themselves, or are allowed to perform functions that are configured for that conference. There may be some instances where the displayed information is restricted to the current conference, such as a treasurer reviewing a check register, but there is still a single login to the system, making it much easier for a volunteer to handle multiple tasks as needed.

**Conference Member:** Everyone who is part of a conference should be assigned the conference member role. This is a non-login role, but it allows for adding individuals to mailing lists or as volunteers who drive or participate as a ride-along on home visits and ensures accurate counts for reporting and volunteer task and time tracking.

**Intake Person:** This is a volunteer that is primarily tasked with collecting information from those seeking assistance, entering the data into the system, and validating that the person in question is either new or someone that's been helped before (and checking that accounts with previous assistance are reviewed for eligibility and fraud purposes).

**Case Worker:** This is the worker tasked with interviewing the client and working with them to determine what sort of help SVdP can provide. Whether via a home visit or conducted by phone, they work down a checklist of assessment items - exploring the person's household and habits and determining what sort of assistance is appropriate. They prepare the assistance request recommendations for the treasurer and perform the follow-ups.

**Secondary Case Worker:** This is the worker tasked as the alternate or additional caseworker who generally attends a home visit. Many times these volunteers are simply ride-alongs rather than people expected to perform work with CMS - but they represent a distinct set of individuals in your conference that fulfill the "Vincentians - Always Two" purpose.

**Conference Treasurer:** This role manages the conference check register and approves, denies, or alters assistance requests. It is responsible for balancing books and generating the monthly/ annual reports. There are many SVdP specific functions that have been accommodated here.

**Express Assistance Provider:** Express Assistance is simple, often in-kind assistance that is given to people outside the case workflow process. Those given this role will see the 'Express Assistance' option in the Main Menu and are eligible to disburse express assistance (or record said disbursements).

**Express Assistance Manager:** Express Assistance Managers have rights related to reporting and editing recorded Express Assistance.

**Case Manager:** This role amounts to a case distribution officer and acts as an intermediary between intake and casework. It allows conferences to accommodate a manual intervention phase between intake and casework where a single responsible person (or team of persons) assigns cases to caseworkers based on external factors such as caseworker availability.

**Conference President, Vice President, Secretary:** Conference leadership and executive roles with the ability to run certain administrative reports and create users/assign roles. As of this time the positions have the same system rights.

**Conference Volunteer Coordinator:** This role involves reviewing non-member volunteer tasks and will be extended to allow the management of conference volunteer efforts for conference members who might lag in their efforts to use CMS to record their work.

**Conference Administrator:** Role assigned to individual responsible for managing conference details inside CMS.

**Eligibility Auditor:** This is a role dedicated to reviewing red-flagged accounts and managing status changes for client records.

**District Administrator:** A role dedicated to managing district level

**District President:** A role with access to certain district reports and dashboards.

**District Treasurer:** This is a read-only treasurer role that has the rights to review all conference treasury records. They cannot process check request, but they have the ability to examine the register and reports to help diagnose problems the conference treasurer is having when using the system.

**Diocese Call Center Volunteer:** A centralized intake role with a very simple intake data collection screens. These 'call takers' simply collect the simplest information and pass the data on to others for the purpose of client matching and validation prior to assignment.

**Diocese Intake Person:** A centralized intake role with the same utility as a conference Intake Person. This role also serves to pick up the partial intake work captured by the diocese call center volunteers above.

**Diocese Case Manager:** A centralized intake role with the same utility as a conference Case Worker.

**Diocese Eligibility Auditor:** A diocese level red-flagging and client status management role.

**Diocese Administrator:** Role responsible for managing diocese wide configuration elements (such as adding red flag addresses or default vendors). This is an extremely senior role in the system.

**Diocese Development Officer:** A role related to grants that has access to some datamining functionality at the diocese level. (Also known as an Advancement Officer in some circles.)

**Diocese Treasurer:** Much as the district treasurer, this is a treasurer position able to run certain reports and view certain dashboards oriented to overview of all conferences within the diocese. They also have access to view the check registers of conference treasurers to help diagnose and resolve common issues.

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**Note:** the Outreach Center Conference model uses standard Intake and Caseworker roles. Simply use those when assigning members to perform those actions.

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