CMS Conference Administrator User Guide

Conference Page Settings

Intake Performs Intake   **Case Worker Self Assigns – Intake can assign checked**

Role *Intake Only* - Options
- Intake Submit Options:
  - Intake can assign
  - Done button clicked case available in My Assigned Cases

Role *Intake, Case Worker* – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned cases
- Intake Submit Options:
  - Can choose Accept, Assign or Done
  - Accept – assign to self
  - Assign – Assign Case Workers
  - Done button clicked case available in Unassigned Cases for a Case Manager

Role *Intake, Case Worker, Case Manager* – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned cases
- Intake Submit Options:
  - Can choose Accept, Assign or Done
  - Accept – assign to self
  - Assign – Assign Case Workers
  - Done button clicked case available in Unassigned Cases for a Case Manager

Intake Performs Intake   **Case Worker Self Assigns – Intake can assign NOT checked**

Role *Intake Only* - Options
- Intake Submit Options:
  - Message: The Case Intake has completed.
  - The case has been filed to a work list for assignment to a case worker.
  - Done button clicked case available in Unassigned Cases for a Case Manager
  - (Gone if conference has no case manager)

Role Intake, Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned cases
- Intake Submit Options:
  - Can choose Accept or Done
  - Accept – assign to self or Case Manager and Secondary
  - Done button clicked case available in Unassigned Cases for a Case Manager

Role Intake, Case Worker, Case Manager – Options, same as Intake Case Worker
- Intake Submit Options:

Can choose Accept or Done
Accept – assign to self or Case Manager and Secondary
Done button clicked case available in Unassigned Cases for a Case Manager

Intake Performs Intake   Case Manager Team Assigns – Intake can assign checked
Role Intake Only – Options, My Assigned Cases, Volunteer Tasks, Case Intake
 Intake Submit Options:
  Can Assign Case Workers and Case Manager
  OK button – Case available in Unassigned Cases for a Case Manager

Role Intake, Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake
 Intake Submit Options:
  Can Assign Case Workers and Case Manager
  OK button – Case available in Unassigned Cases for a Case Manager

Role Intake, Case Worker, Case Manager – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned cases for case worker
 Intake Submit Options:
  Can Assign Case Workers and Case Manager
  OK button – Case available in Unassigned Cases for a Case Manager

Intake Performs Intake   Case Manager Team Assigns – Intake can assign NOT checked
Role Intake Only - Options, My Assigned Cases, Volunteer Tasks, Case Intake
 Intake Submit Options:
  Message: The Case Intake has completed.
  The case has been filed to a work list for assignment to a case worker.
  OK button – Case available in Unassigned Cases for a Case Manager

Role Intake, Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake
 Intake Submit Options:
  Message: The Case Intake has completed.
  The case has been filed to a work list for assignment to a case worker.
  OK button – Case available in Unassigned Cases for a Case Manager

Role Intake, Case Worker, Case Manager – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned cases for case worker
 Intake Submit Options:
  Message: The Case Intake has completed.
  The case has been filed to a work list for assignment to a case worker.
  OK button – Case available in Unassigned Cases for a Case Manager

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Case Worker Performs Intake　　　Case Worker Self Assigns – Intake can assign checked

Role Intake – Options My Assigned Cases, Volunteer Tasks

Role Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned Cases for Case Worker
> Can choose Accept, Assign or Done
> Accept – assign to self
> Assign – Assign Case Workers and Case Manager
> Done (Case goes to Unassigned Cases for Case Worker)

Role Case Worker, Case Manager – Options My assigned cases, Volunteer Tasks, Case Intake, Unassigned Cases for Case Worker
> Can choose Accept, Assign or Done
> Accept – assign to self
> Assign – Assign Case Workers and Case Manager
> Done (Case goes to Unassigned Cases for Case Worker)

Case Worker Performs Intake Case Worker Self Assigns – Intake can assign NOT checked

Role Intake – Options, My Assigned Cases, Volunteer Tasks

Role Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned Cases for Case Worker
> Can choose Accept or Done
> Done (Case goes to Unassigned Cases for Case Worker)

Role Case Worker, Case Manager – Options My assigned cases, Volunteer Tasks, Case Intake, Unassigned Cases for Case Worker
> Can choose Accept or Done
> Can also assign Case Manager and Secondary
> Done (Case goes to Unassigned Cases for Case Worker)

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Case Worker Performs Intake   Case Manager Team Assigns – Intake can assign checked

Role Intake – Options, My Assigned Cases, Volunteer Tasks

Role Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake
    Can choose Assign or OK
    Click OK button – Case goes to a Case Manager in Unassigned Cases for Case Worker

Role Case Worker, Case Manager - Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned Cases for Case Worker
    Can choose Assign or OK
    Click OK button – Case goes to a Case Manager in Unassigned Cases for Case Worker

Case Worker Performs Intake   Case Manager Team Assigns – Intake can NOT assign checked

Role Intake – Options, My Assigned Cases, Volunteer Tasks

Role Case Worker – Options, My assigned cases, Volunteer Tasks, Case Intake
    Click OK button – Case goes to a Case Manager in Unassigned Cases for Case Worker

Role Case Worker, Case Manager - Options, My assigned cases, Volunteer Tasks, Case Intake, Unassigned Cases for Case Worker
    Message: The Case Intake has completed.
    The case has been filed to a work list for assignment to a case worker.
    OK button – Case available in Unassigned Cases for a Case Manager