

# CMS Conference Administrator User Guide

## Conference Tab

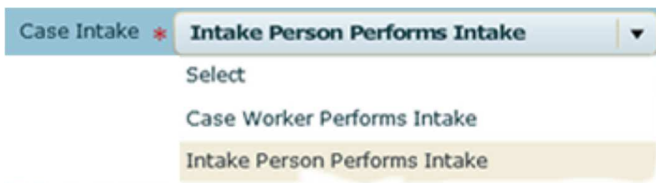


Make sure your conference name is correct and it is your conference.

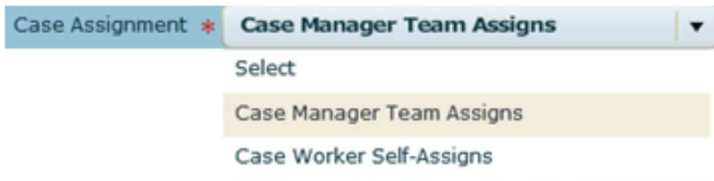


Required fields are Case Intake, and Case Assignment. Define which role your conference uses to perform case intake and to assign case workers.

Case Intake: Select Intake Person Performs Intake or Case Worker performs Intake.

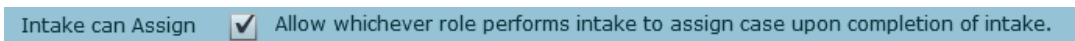


Case Assignment: Select Case Worker Self-Assigns or Case Manager Team Assigns.



Intake can assign.

If this box is checked then whichever role performs intake will be able to assign case workers regardless of their roles. If it is not checked then whichever role is chosen for case assignment will be the only one who can assign case workers.



These options should be decided by your conference and will depend upon how you want your conference to handle cases. Your job as administrator is to set up these options in accordance with your conference guidelines. Refer to Conference Page Settings for more detailed information.

**Note:** If your conference is already running successfully with Case Intake/Case Assignment options already set you need not make any changes.

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Notification Expiration at the bottom of the conference page indicates how many days your conference wants to process notifications, such as check request notifications for the Treasurer, to remain on your message board. These notifications will disappear after the number of days specified in Notification Expiration if not viewed before then.

Notification Expiration  Days

### Roles Tab

**It is important that everyone be assigned a “conference member” role in addition to their other roles. Secondary will NOT be displayed in the drop down if the user is not assigned a “conference member” role.**

Conference administrator’s job is to assign roles to conference members. Most members will have a role in your conference and you need to assign them to that role. You must also make them a conference member. As a conference administrator stress the importance of having all members who have roles other than just conference member go to My Profile and make sure all their personal information, especially their email address, is correct. If a person is no longer a conference member you may remove that person from your conference by removing him from all conference roles the conference member was assigned. If the conference member will remain a conference member but not have any role(s) you may just remove that conference member from the role(s).

### Working with conference roles.

Select a role by clicking the role your conference member will be assigned, for example Case Worker. A conference member may be assigned more than one role, this process works the same for all roles. Notice that the Conference Member designation has no box in the L column. That means that someone who is only a conference member cannot log into CMS.

Conference	Roles	Zip Codes	Required Document
L: Role applies to login. M: Role allows multiple assignees.			
L	M	Role	
<input type="checkbox"/>	<input type="checkbox"/>	Case Manager	
<input type="checkbox"/>	<input type="checkbox"/>	Case Worker	
<input type="checkbox"/>	<input type="checkbox"/>	Conference Administrator	
	<input type="checkbox"/>	Conference Member	
<input type="checkbox"/>	<input type="checkbox"/>	Intake Person	
<input type="checkbox"/>	<input type="checkbox"/>	Treasurer	

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### Assign conference member role(s).

In this example we will assign a member to the role of case worker. The process works the same for all roles.

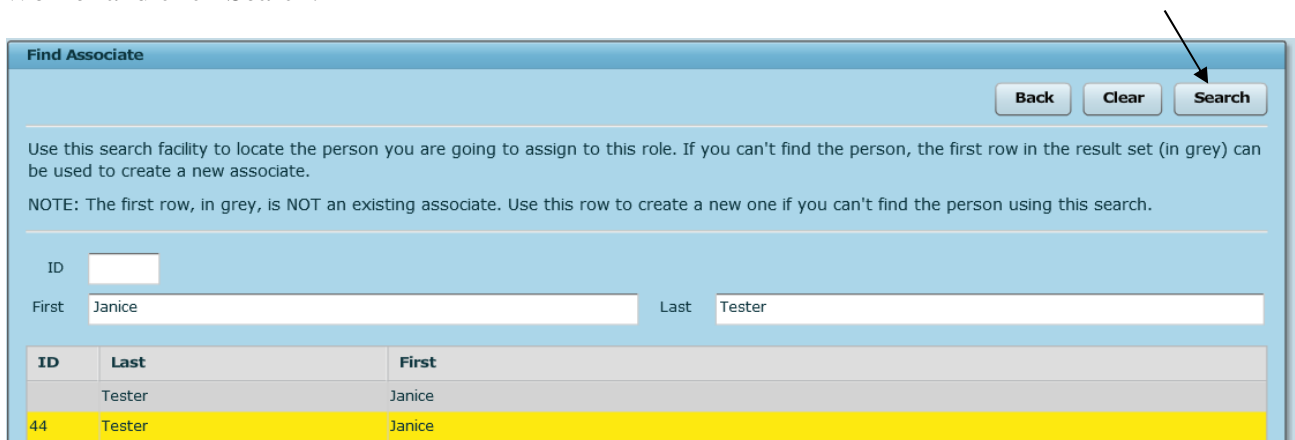
When the Case Worker screen opens click the Assign button to Assign a member to the Case Worker role.



The screenshot shows the 'Case Worker - Conference Test' interface. At the top right, there are three buttons: 'Back', 'Assign', and 'Remove'. An arrow points to the 'Assign' button. Below the buttons, there is a 'Role' dropdown menu set to 'Case Worker' and a 'Conference' dropdown menu set to 'Test'. A table lists assigned members with columns for Status, Last Name, and First Name.

Status	Last Name	First Name
Assigned	cw	jane
Assigned	cwcmgr	Jane
Assigned	GA1	Tester
Assigned	GA2	Tester
Assigned	GA3	Tester
Assigned	GA4	Tester
Assigned	GA5	Tester

When the Find Associate screen opens type in the name of the person you want to assign as a Case Worker and click Search.



The screenshot shows the 'Find Associate' interface. At the top right, there are three buttons: 'Back', 'Clear', and 'Search'. An arrow points to the 'Search' button. Below the buttons, there is a text area with instructions: 'Use this search facility to locate the person you are going to assign to this role. If you can't find the person, the first row in the result set (in grey) can be used to create a new associate. NOTE: The first row, in grey, is NOT an existing associate. Use this row to create a new one if you can't find the person using this search.' Below the text area, there are input fields for 'ID', 'First' (containing 'Janice'), and 'Last' (containing 'Tester'). A table shows search results with columns for ID, Last, and First.

ID	Last	First
	Tester	Janice
44	Tester	Janice

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When the Case Worker Assign screen opens add user information and click OK. If the Associate already has a role you may click the Edit button if you wish to change user information. When you are satisfied with the associate's information you may click the Roles tab and you will see all roles assigned to this associate. Click OK and you will be returned to the Case Worker screen.

Case Worker - Assigned - Conference Test

Associate Roles

ID 44 Username jtester

First Janice Last Tester

Ethnicity C - White/Caucasian Over 40? Yes

Home Phone 770-928-7804 Cell Phone

Work Phone Email

Emergency Contact

Address

City State Georgia Zip 30000

OK Edit

### Remove conference member role(s).

Remove conference members. In this example we will remove a member from the role of Case Worker. The process works the same for all roles.

When the Case Worker screen opens click the Remove button to Remove a case worker from the Case Worker role.

Case Worker - Conference Test

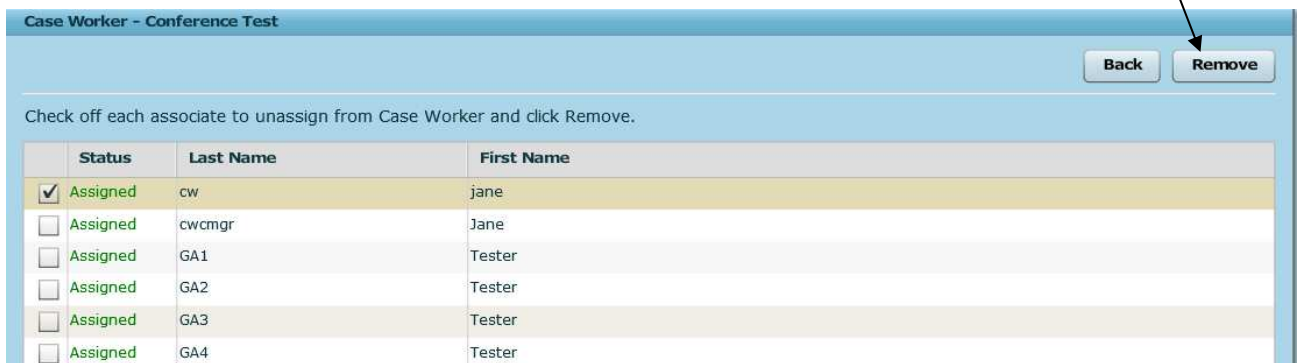
Back Assign Remove

Role Case Worker Conference [Test](#)

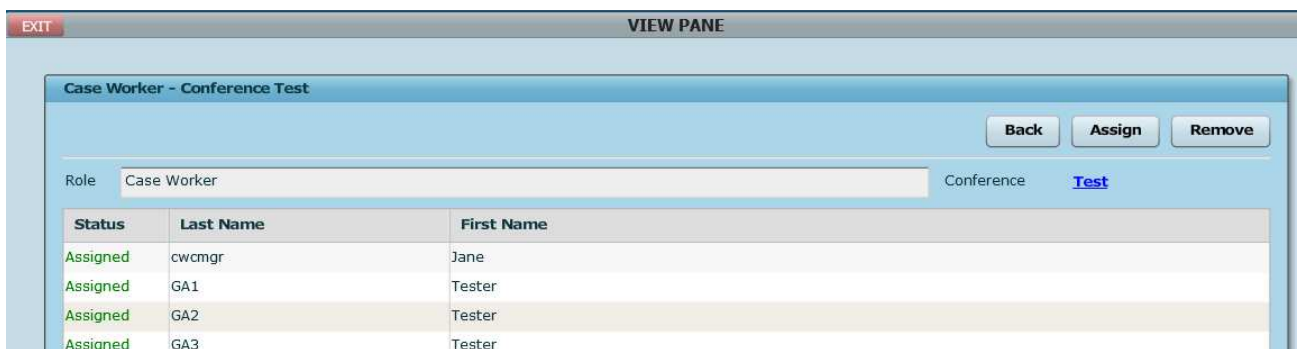
Status	Last Name	First Name
Assigned	cw	jane
Assigned	cwcmgr	Jane
Assigned	GA1	Tester
Assigned	GA2	Tester
Assigned	GA3	Tester
Assigned	GA4	Tester
Assigned	GA5	Tester

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When the Case Worker screen opens you will see a list of all conference members assigned to the case worker role. Place a check mark in the box next to the name of the conference member you want to remove (you may remove more than one member at a time) and click the Remove button. In this case we checked jane cw to remove.



After you click Remove you will be returned to the case worker list and you can verify that the case worker(s) you wanted to remove are indeed removed. Notice jane cw has been removed from the case worker role.



It is important that everyone be a conference member regardless of their roles. All conference member names will display in the drop down for Secondary case assignment.