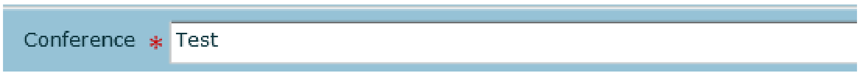
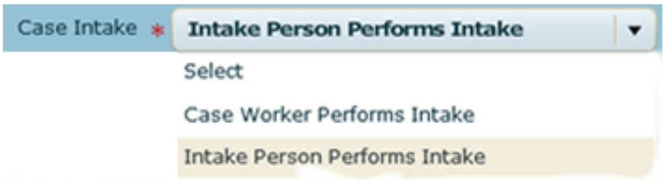
Conference Tab 

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.

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.

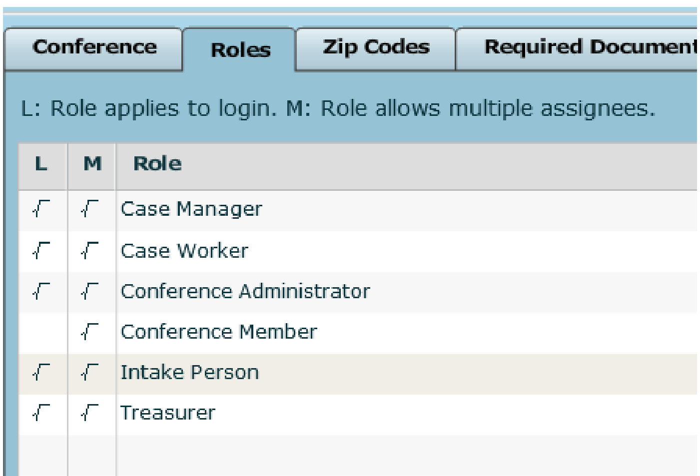
Roles Tab 

<u>**It is important that everyone be a 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.**</u>

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.

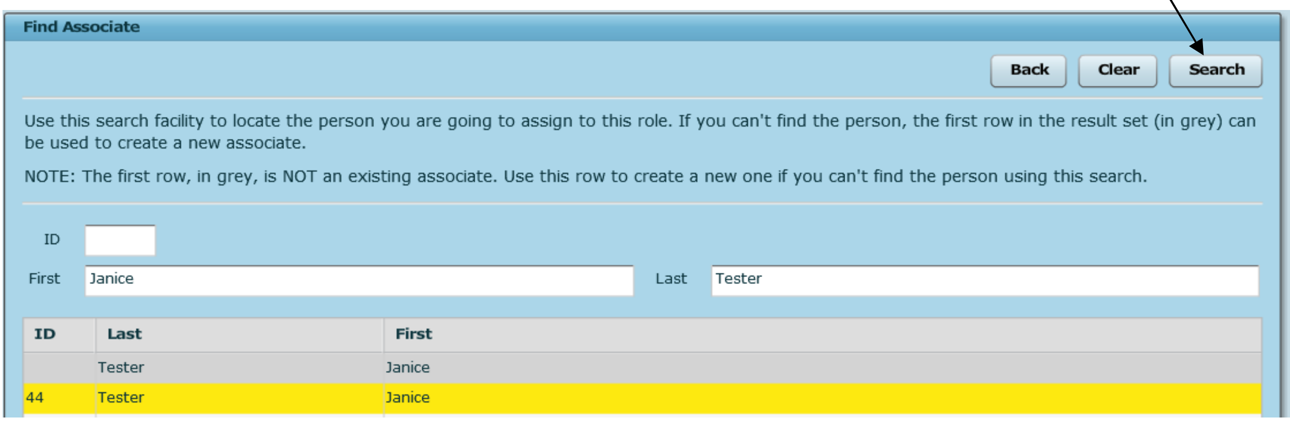


Assign conference member role(s).

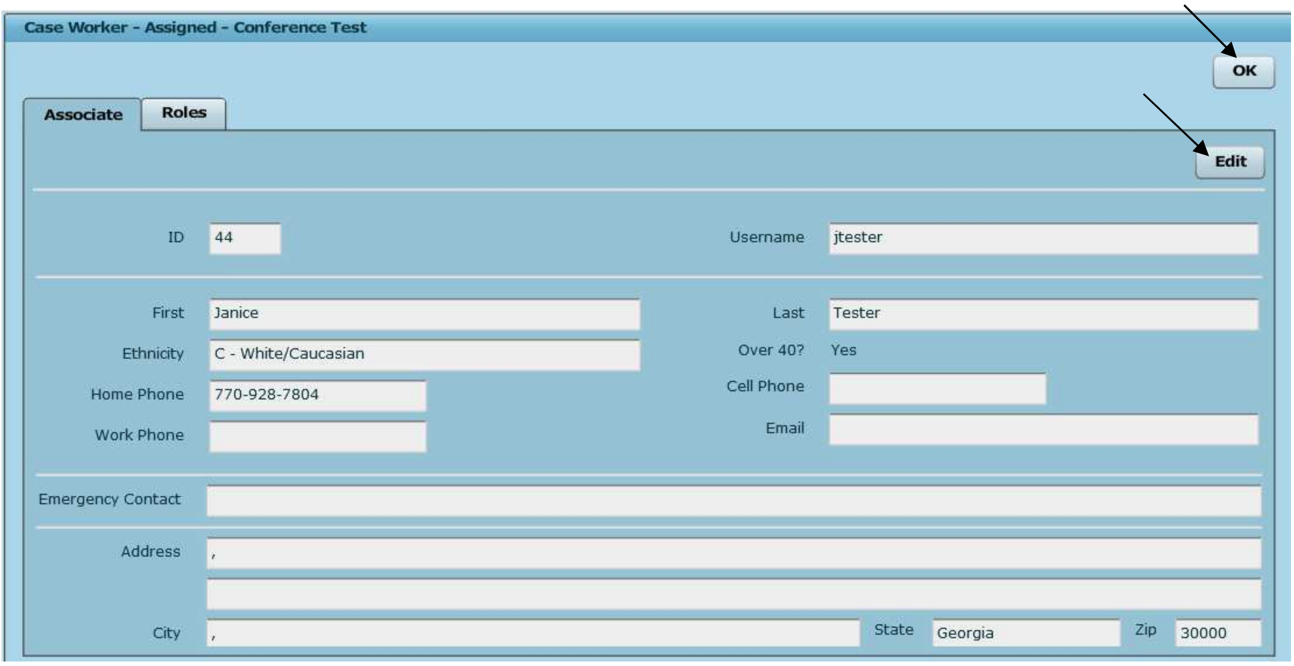
In this example we will assign a member to the role of case worker. The process works the same for all roles.

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

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



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.



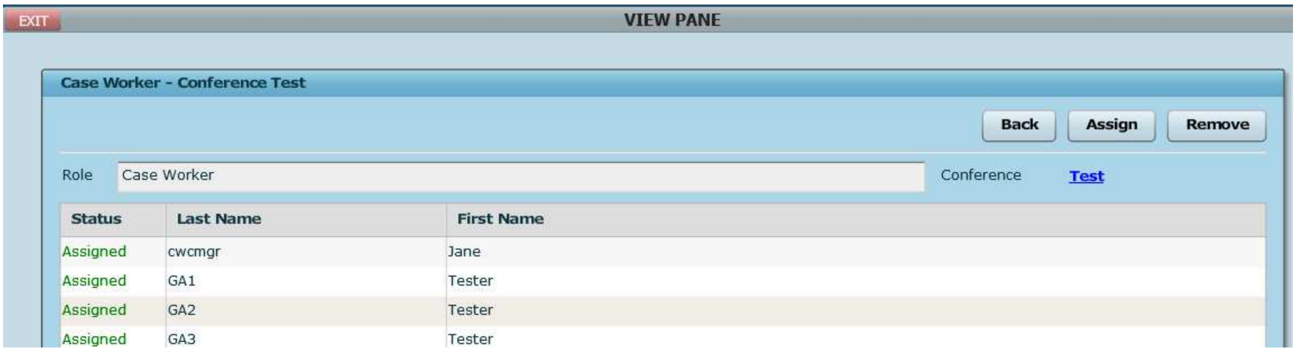
Remove conference member role(s).

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.

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.