



CMS Helpful Hints

1. In CMS you only need to click (left click on your mouse) on anything once, not double click as most of us are trained to do in other systems/software.
2. The lists within CMS (of unassigned cases, search lists for past clients or cases, etc.) is in different orders depending on the list. To make it easier to search any list you can click on the header for any column to put the entire list in ascending order, based on the column header that you clicked. So if you click once on the column headed Case, it will put the information in ascending numerical case number order (smallest to largest case number). If you click once on the column headed Client, it will put the information in ascending alphabetical client name order.
 - a. Clicking on any header twice gives you the list in descending order (largest case number to smallest).
3. On all of the drop down/selection menus (of states, counties, income, expenses, etc.) if you click on "Select" and then enter any letter of the alphabet on your keyboard it will take you to that alphabetical portion of the drop down menu. For instance when selecting an income entry, you can either scroll down to Social Security or you can click on "Select", hit the "S" on your keyboard and it will take you straight to Social Security to save you time and clicks on your scrolling.
4. When you type in phone numbers in the client profile tab the "-" don't appear until you move to the next field, but they will appear so you don't have to enter them manually.
5. If you are doing a search and are not sure of the spelling of a name, you can use a % sign as a way to match any trailing letters. For example, if you search for a client using First name:Ch%, Last name:Clarke, CMS will let you choose from Chan'Te Clarke as well as Chante Clarke as well as Chanti Clarke, etc. You can use the % function on First Name, Last Name, Address, City and SSN. It is especially helpful to use with address suffixes such as Drive/Dr., Place/Pl., etc. If the client was previously entered as Dr. and you enter Drive in your search, you will not find a match. So when doing the search put in D% and you will find all potential matches.
6. For Vincentians using tablets (versus desktop systems) it is particularly helpful to maximize the "working section" of the CMS screen, called View Pane. Doing this hides the Task Pane (that runs down the left hand side of the screen at each launch) and widens the View Pane. You can do this by clicking on the box to the far right of the grey View Pane header.
7. If CMS seems to get "stuck" and is frozen while trying to move to the next field or screen, if you open any other program on your computer (Solitaire, Poker, Outlook, Word, PowerPoint, etc.) CMS will immediately become "unstuck" and let you progress to the next step. The only time this does not work is when the system is "searching" for a match to a prior client/when you are trying to move from the Client tab to the Household tab.