CONFERENCE ADMINISTRATOR

USER GUIDE v1.1.4

Hope in Action
Changing Lives...One at a Time
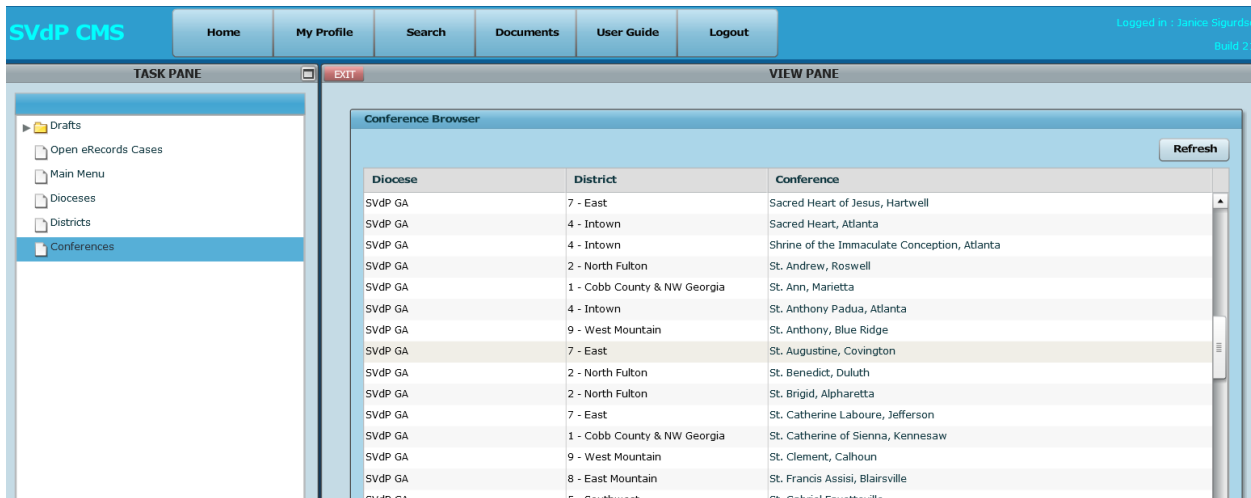
CMS Conference Administrator User Guide

Getting Started

Conference Administrators must log into the application just like a non-administrator user.

Conference administrators can:
- Set Conference options
- Maintain User Roles
- Maintain Documents
- Maintain Zip Codes
- Reset User Passwords

Click the Conference Page in the Task Pane and select your conference.

After selecting your conference you will see your conference main page.

Conference Tab

Make sure your conference name is correct and it is your conference.
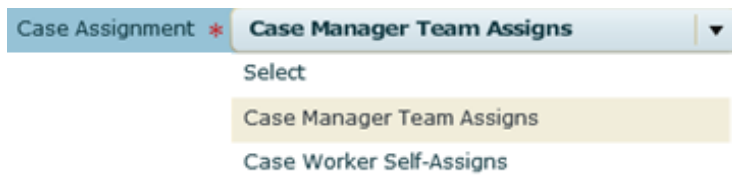
Required fields are Case Intake, and Case Assignment. Define which role your conference uses to perform case intake and to assign case workers.

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.

Notification Expiration	7	Days

Roles Tab [Roles]

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.

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.
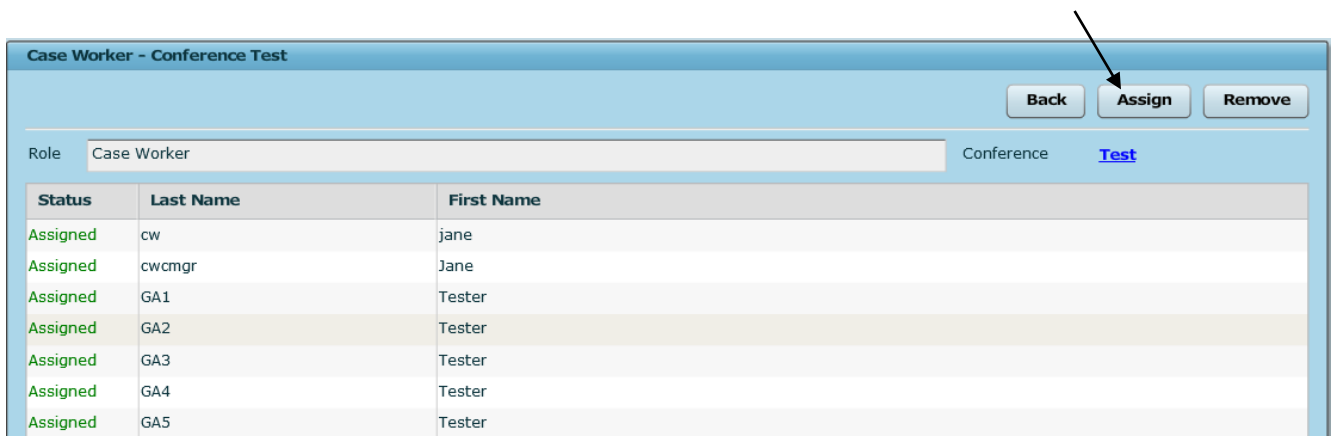
Assign conference member role(s).

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.

Case Worker - Assigned - Conference Test

		OK

Associate | Roles

Edit

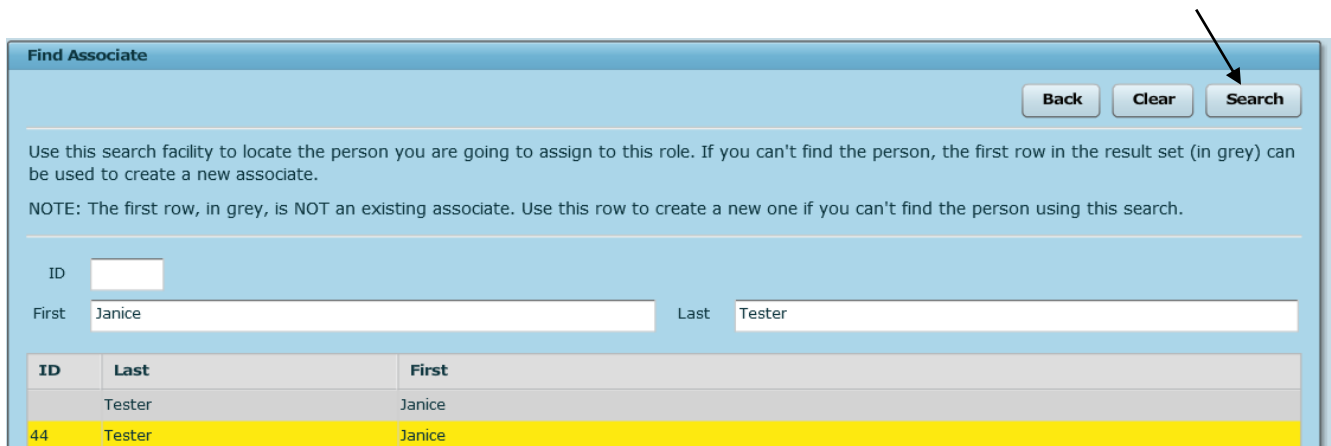| Field	Value	Field	Value
ID	44	Username	jtester
First	Janice	Last	Tester
Ethnicity	C - White/Caucasian	Over 40?	Yes
Home Phone	770-928-7804	Cell Phone	
Work Phone		Email	
Emergency Contact			
Address	,		
City	,	State	Georgia	Zip	30000

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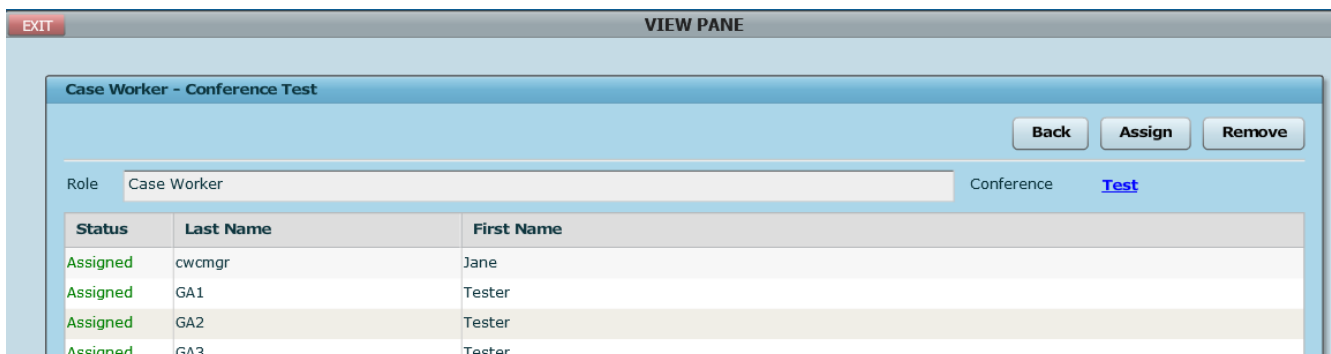
When the Case Worker screen opens you will see a list of all conference members assigned to the case worker role. Place a check mark in the box next to the name of the conference member you want to remove (you may remove more than one member at a time) and click the Remove button. In this case we checked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

Zip Code Tab   Zip Codes

Make sure the zip codes for your conference are correct and up to date. When you click the Zip Code tab the zip code screen will open and you may add or remove zip codes for your conference.

Conference	Roles	Zip Codes	Required Documents	Documentation		
					Add	Remove
Zip Code						
30000						

Required Documents Tab   Required Documents

The Required Documents Tab is no longer used. In order to speed up the case worker process the required documents tab was removed from the case work input screens. There will be a separate procedure for conferences to upload their required documents that should be in place by version 2.0 if not before. Meanwhile, if your conference has already uploaded a client bill you may view it by selecting Search>Documents.

Documentation Tab   Documentation

Currently you may upload a document or link to a URL but be aware the document or link can be seen by all conferences.
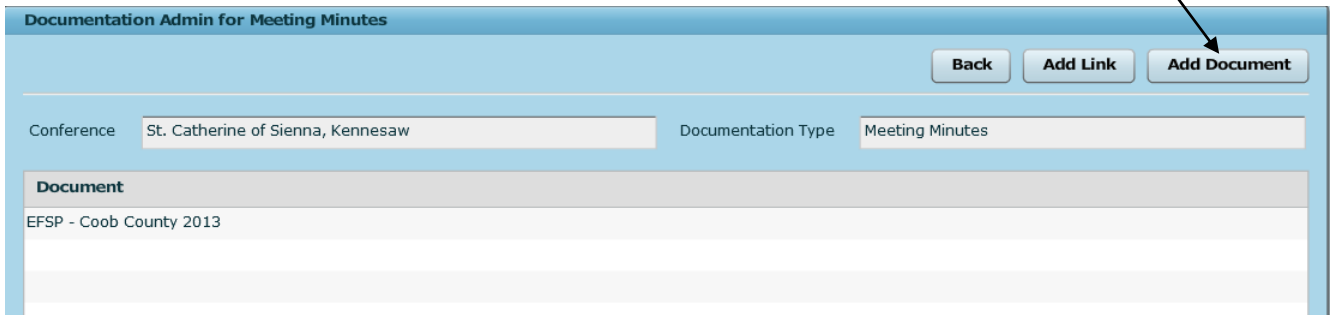
Add a Document

To upload a document select the type of document you want to upload. For example, meeting minutes. Click Meeting Minutes.

Conference	Roles	Zip Codes	Required Documents	Documentation	
					User Guide Admin
Documentation Type					
Conference Report					
Bank Statment					
Meeting Minutes					
References					
Case Record Form					

Documentation Admin for Meeting Minutes screen will open. Click Add Document.

Name must be entered first. Enter the file name in the Name box. This will be the name of the file that will appear when you select Meeting Minutes from Document Type found in the Documents button.

For example, clicking Meeting Minutes in Documentation will show your *Meeting Minutes for April 8 2014* in the list of documents.

Click the Browse button and find the name of your file and click Open button. The name of the file you opened will display in the File box. The Clear button will clear the File name and you may try again if you wish.
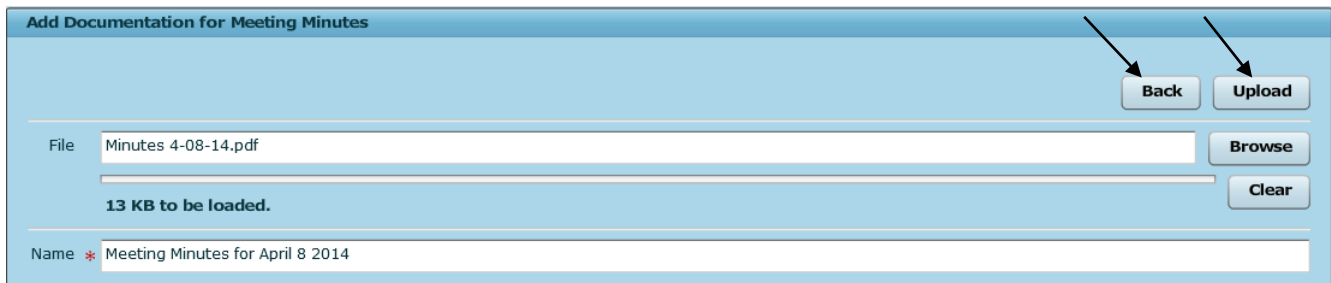
File	Minutes 4-08-14.pdf	Browse
		Clear
13 KB to be loaded.		

Click the Upload button and your file will be uploaded to the Documents folder.

Click the Back button and you will be back at the Documentation tab.
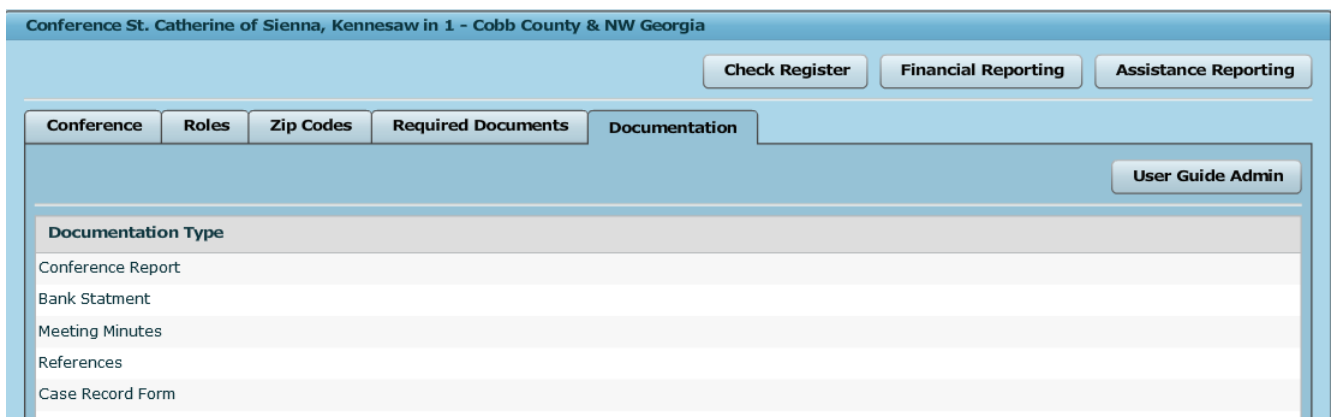
Add Documentation for Meeting Minutes

Back   Upload

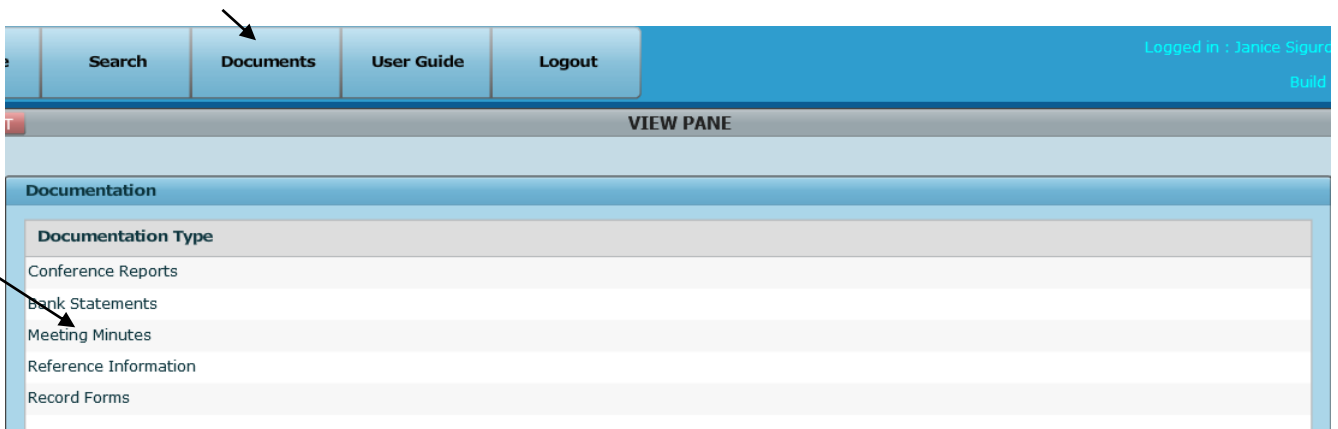| File	Minutes 4-08-14.pdf	Browse
		Clear
13 KB to be loaded.		
Name *	Meeting Minutes for April 8 2014	

Conference St. Catherine of Sienna, Kennesaw in 1 – Cobb County & NW Georgia

Check Register   Financial Reporting   Assistance Reporting
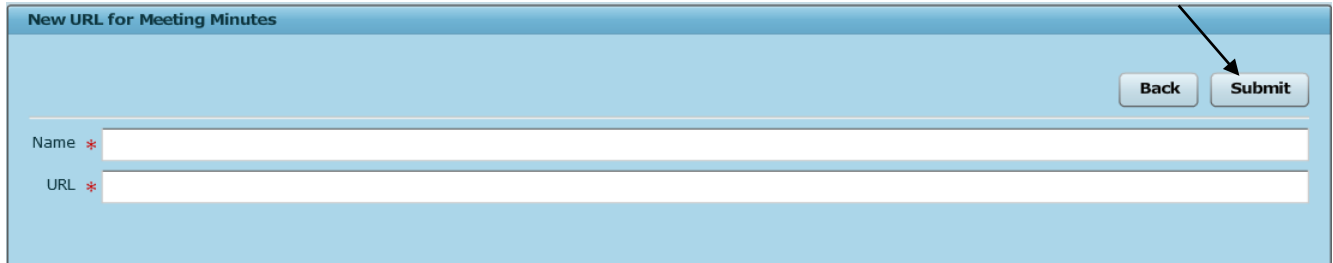
Conference	Roles	Zip Codes	Required Documents	Documentation

User Guide Admin

Documentation Type

Conference Report

Bank Statment

Meeting Minutes

References

Case Record Form

Add a Link

To add a link you use the same process as you used for adding a document except instead of entering a document name and document file name you add the name of your link and the URL for the link. After you have entered the Name and the URL click the Submit button

New URL for Meeting Minutes

Back   Submit

Name *

URL *

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Resetting User's Passwords

The Conference Administrator now has the ability to reset passwords for all users within their conference.

Go to Search>Contact Information
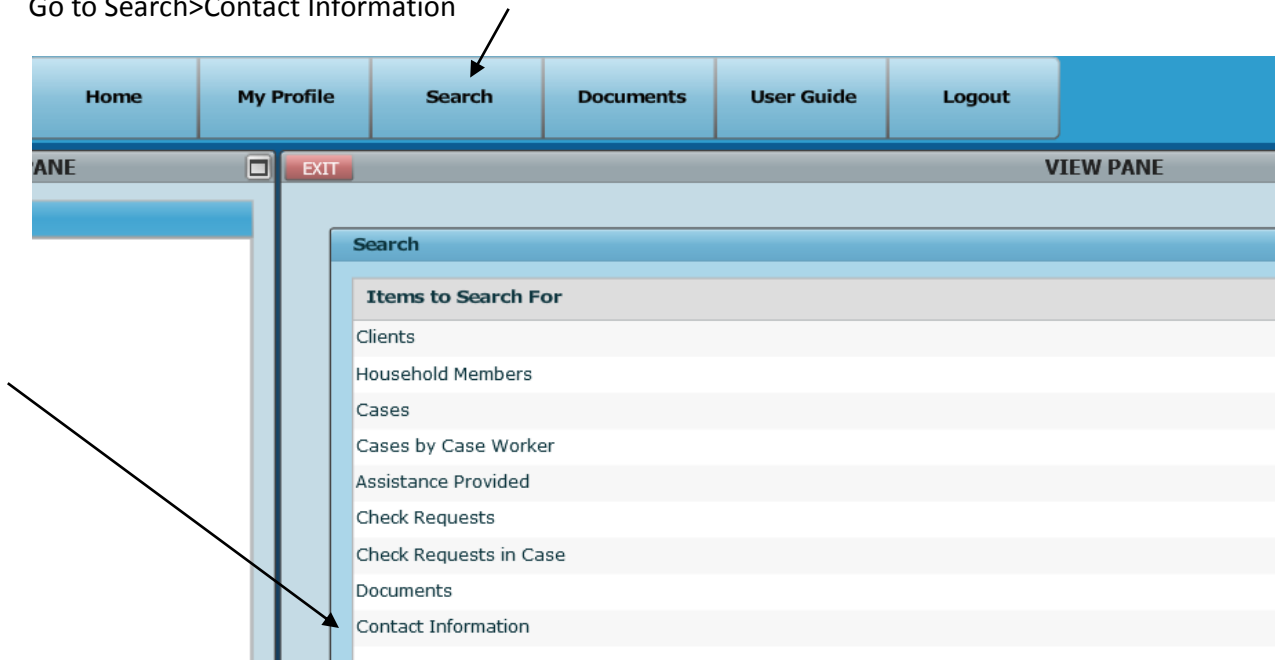
Select your conference from the drop down list box if the default is not entered.

Locate the user by entering any of the available search criteria (such as, First, Last name)

Click on the user in the search results grid

Click the Change Password button

Enter the New Password and Re-Enter Password then click the Submit button.

Notify user of new password.

Conference members need to know

Select My Profile

Make sure their conference is selected and Set Current Conference (this needs to be done only once)
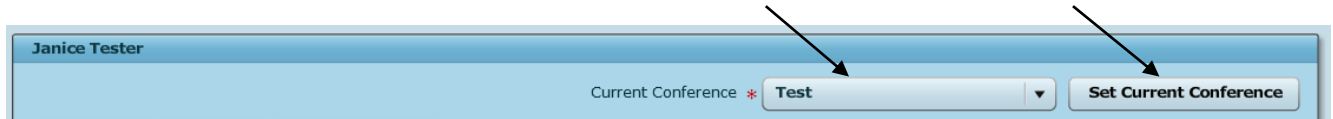
Ensure that all information including email address is present and correct. You cannot receive system emails that your case is ready to close if you do not have a good email address. If you are a treasurer you cannot receive "new check request" emails if you don't have a valid email address.

My Roles

Clicking this tab will show the user what roles he is assigned in CMS. If your user thinks these roles are incorrect he should contact you, the conference administrator.

Volunteer Tasks

Very important that users log in their volunteer hours that are not spent with a client. For example, counting second collection, working in the food pantry, attending conference meetings and so forth.

Click the Add/Edit button to add or change volunteer hours.
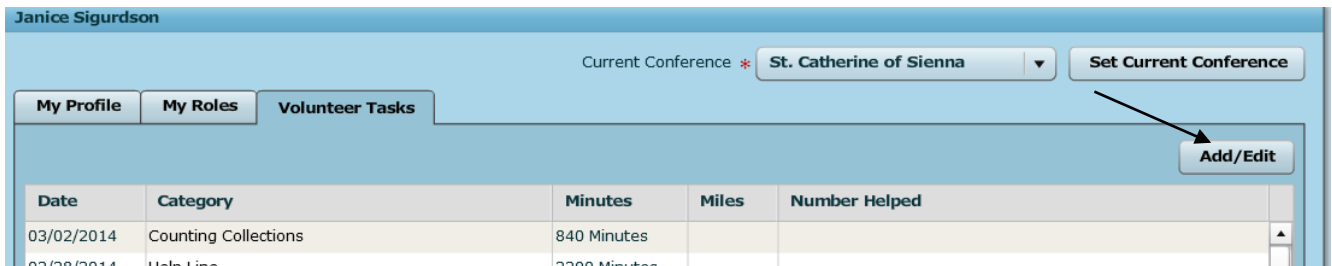
User changing password

If you reset a user's password, notify the user to login with his user name and the new password you created. The user may then log in and change their password to one of their choosing.

Users may also change their password at any time.
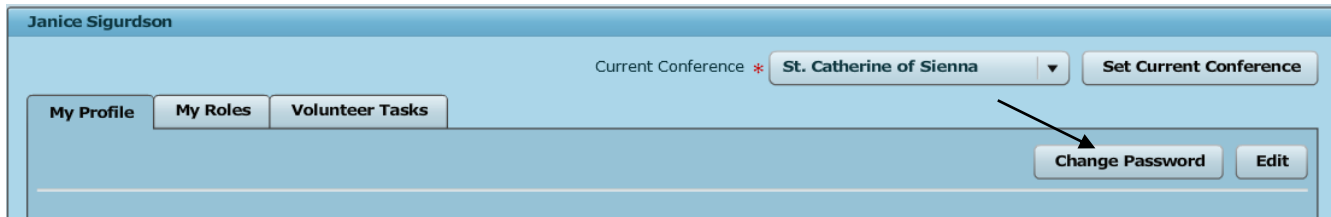
Conference Page Settings

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)

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