



CONFERENCE ADMINISTRATOR USER GUIDE v1.1.4

Hope in Action
Changing Lives...One at a Time



CMS Conference Administrator User Guide

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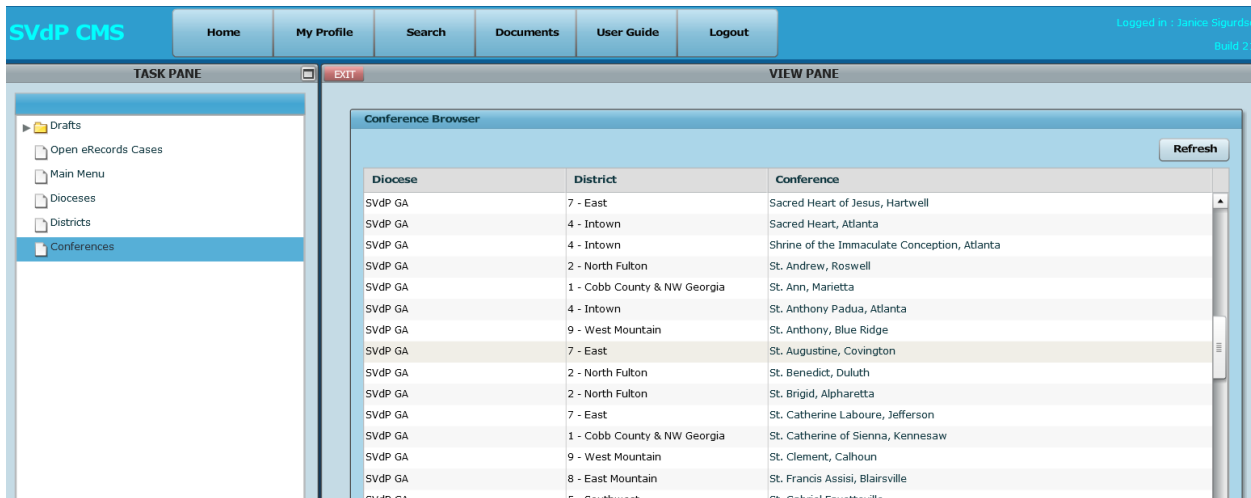
Getting Started

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.

The screenshot shows the main page for the conference 'St. Catherine of Sienna, Kennesaw in 1 - Cobb County & NW Georgia'. The page has a header with buttons for 'Check Register', 'Financial Reporting', and 'Assistance Reporting'. Below the header is a tabbed interface with tabs for 'Conference', 'Roles', 'Zip Codes', 'Required Documents', and 'Documentation'. The 'Conference' tab is active, showing a 'Case Distribution Report' button and a 'Save' button. The main content area displays the following information:

Archdiocese: [SVdP GA](#)

District: [1 - Cobb County & NW Georgia](#)

Conference: * St. Catherine of Sienna, Kennesaw

Case Intake: * [Intake Person Performs Intake](#)

Case Assignment: * [Case Manager Team Assigns](#)

Intake can Assign: ☒ Allow whichever role performs intake to assign case upon completion of intake.

Process notifications, such as check request notifications for the Treasurer, will also appear on the Message Board for the intended recipient. These notifications will disappear after the number of days specified in Notification Expiration if not viewed before then.

The Diocese-wide default (7 days) will be used if no value is provided here.

Notification Expiration: Days

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Conference Tab



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

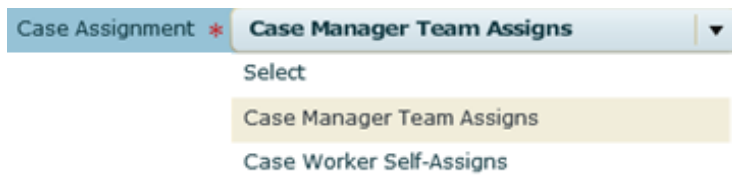
A blue input field with the text "Conference * Test". The asterisk indicates a required field.

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.


A dropdown menu for "Case Intake *". The selected option is "Intake Person Performs Intake". Other options include "Select", "Case Worker Performs Intake", and "Intake Person Performs Intake" (highlighted).

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

A dropdown menu for "Case Assignment *". The selected option is "Case Manager Team Assigns". Other options include "Select", "Case Manager Team Assigns" (highlighted), and "Case Worker Self-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.

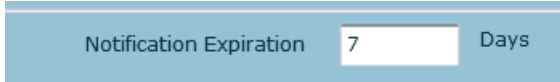
A checkbox labeled "Intake can Assign" which is checked. The text next to it says "Allow whichever role performs intake to assign case upon completion of intake."

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.

A light blue rectangular box containing the text "Notification Expiration" on the left, a white input field with the number "7" in the center, and the text "Days" on the right.

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.

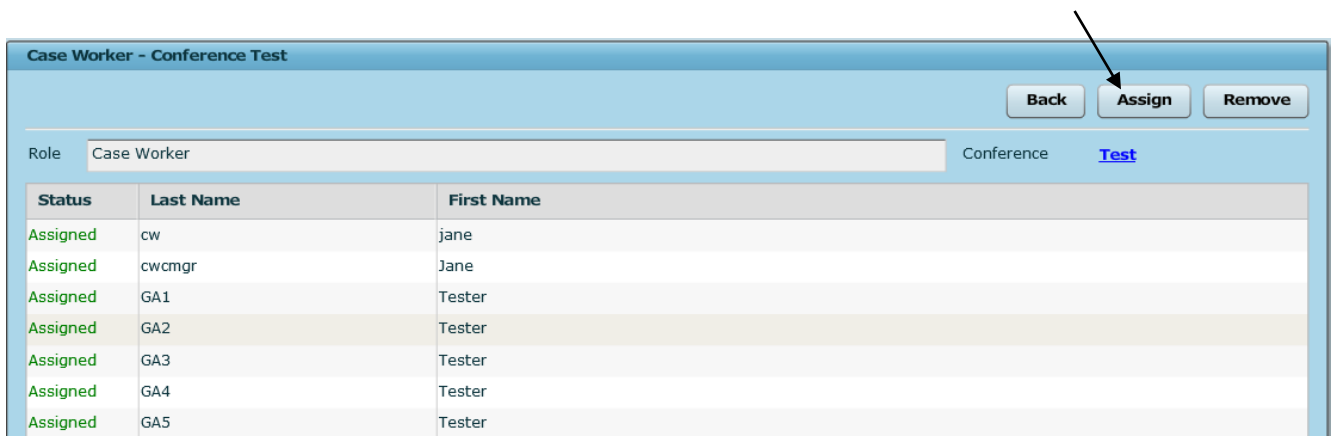
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Conference		
Roles		
Zip Codes		
Required Document		
L: Role applies to login. M: Role allows multiple assignees.		
L	M	Role
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Case Manager
<input checked="" type="checkbox"/>	<input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

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.



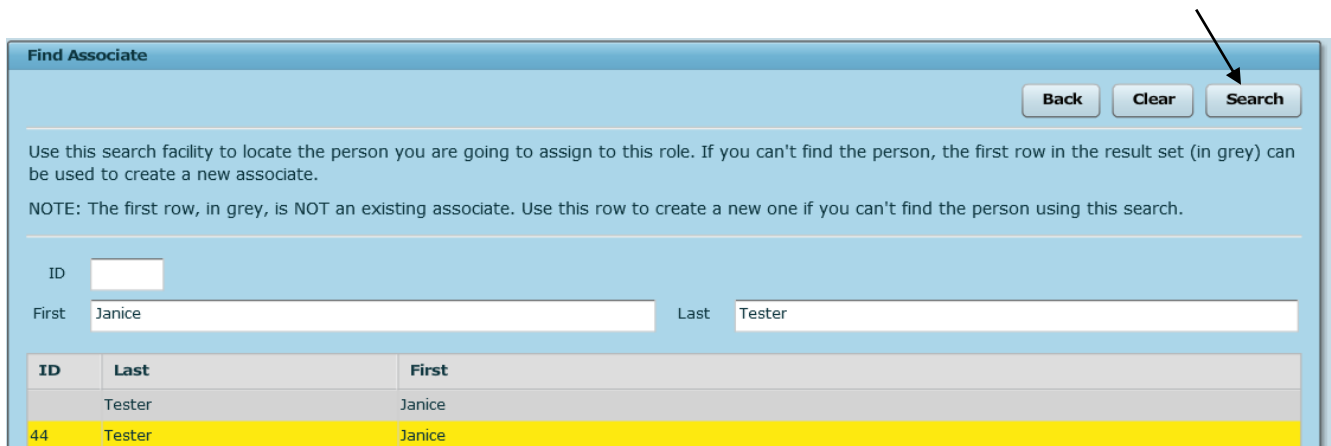
Case Worker - Conference Test

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



Find Associate

Back Clear Search

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.

ID

First Janice Last Tester

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

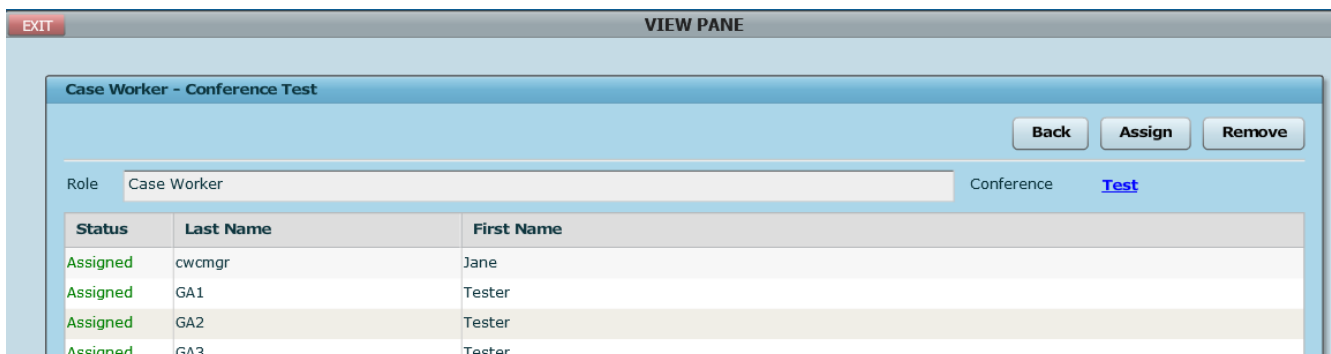
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When the Case Worker screen opens you will see a list of all conference members assigned to the case worker role. Place a check mark in the box next to the name of the conference member you want to remove (you may remove more than one member at a time)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



	Status	Last Name	First Name
<input checked="" type="checkbox"/>	Assigned	cw	jane
<input type="checkbox"/>	Assigned	cwcmgr	Jane
<input type="checkbox"/>	Assigned	GA1	Tester
<input type="checkbox"/>	Assigned	GA2	Tester
<input type="checkbox"/>	Assigned	GA3	Tester
<input type="checkbox"/>	Assigned	GA4	Tester

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.



Status	Last Name	First Name
Assigned	cwcmgr	Jane
Assigned	GA1	Tester
Assigned	GA2	Tester
Assigned	GA3	Tester

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.

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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.

The screenshot shows the 'Zip Codes' tab selected in a navigation bar. The main area contains a table with a header 'Zip Code' and one row with the value '30000'. To the right of the table are two buttons: 'Add' and 'Remove', each with an arrow pointing to it from the right.

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.

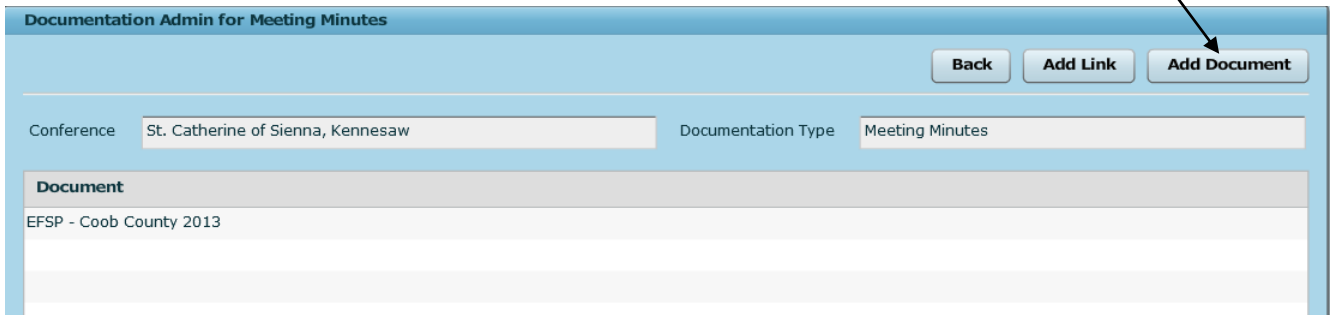
Add a Document

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

The screenshot shows the 'Documentation' tab selected in a navigation bar. The main area contains a table with a header 'Documentation Type' and five rows: 'Conference Report', 'Bank Statment', 'Meeting Minutes', 'References', and 'Case Record Form'. An arrow points to the 'Meeting Minutes' row. To the right of the table is a button labeled 'User Guide Admin'.

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



Documentation Admin for Meeting Minutes

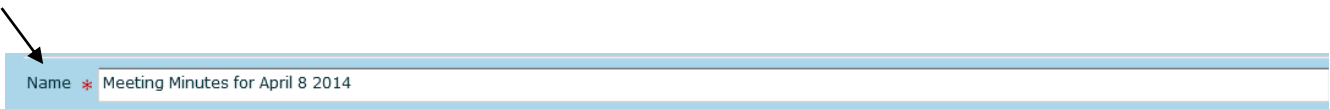
Back Add Link Add Document

Conference St. Catherine of Sienna, Kennesaw Documentation Type Meeting Minutes

Document

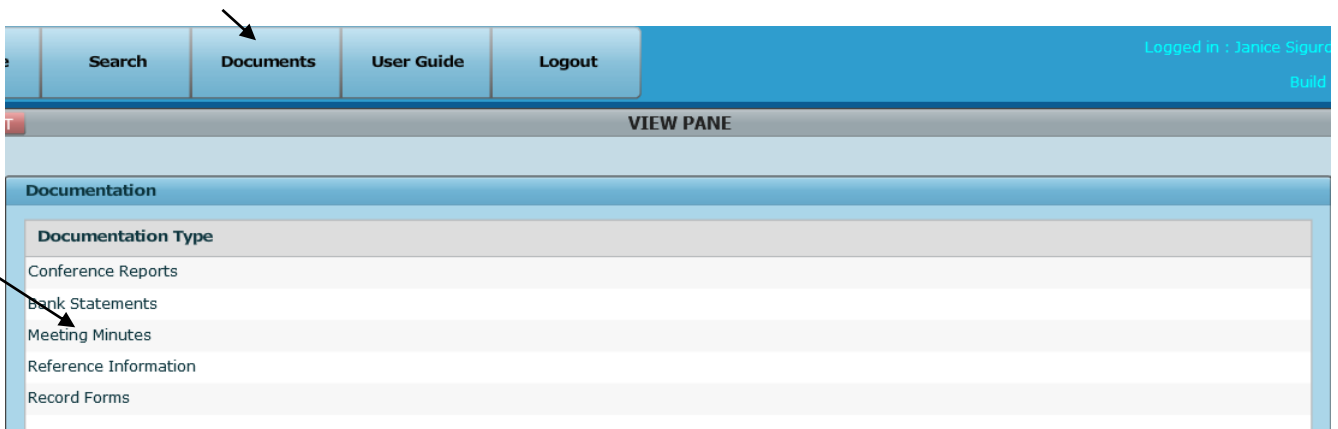
EFSP - Coob County 2013

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.



Name * Meeting Minutes for April 8 2014

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



Search Documents User Guide Logout

Logged in : Janice Sigurdson Build

VIEW PANE

Documentation

Documentation Type

- Conference Reports
- Bank Statements
- Meeting Minutes
- Reference Information
- Record Forms

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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.

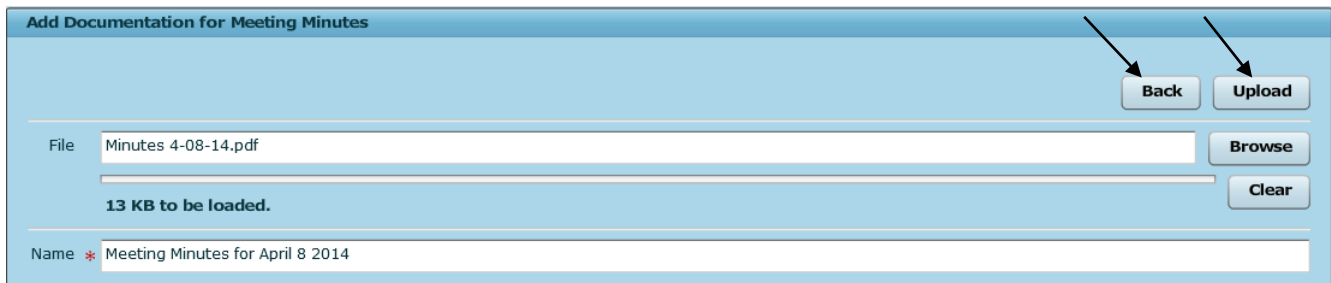


File

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.

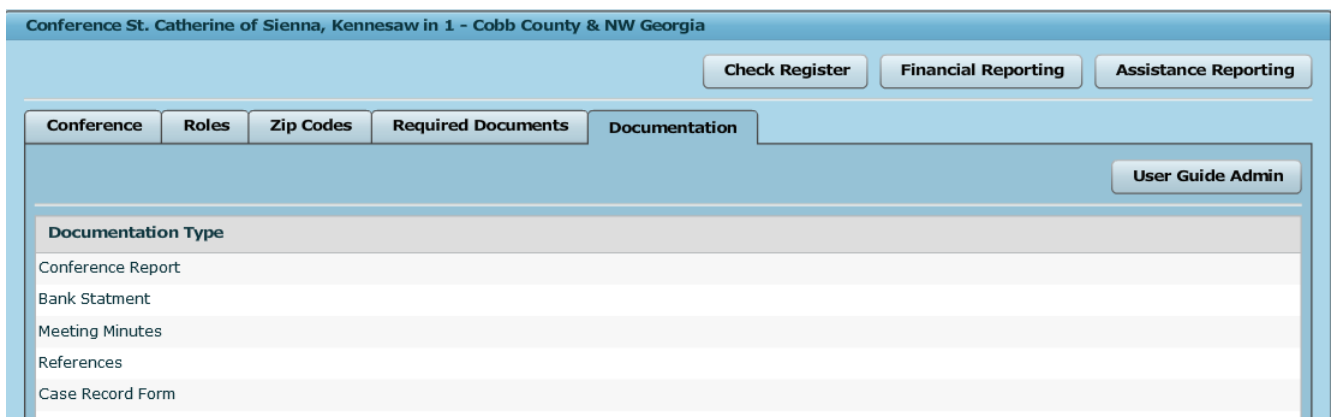


Add Documentation for Meeting Minutes

File

13 KB to be loaded.

Name *



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

Conference **Roles** **Zip Codes** **Required Documents** **Documentation**

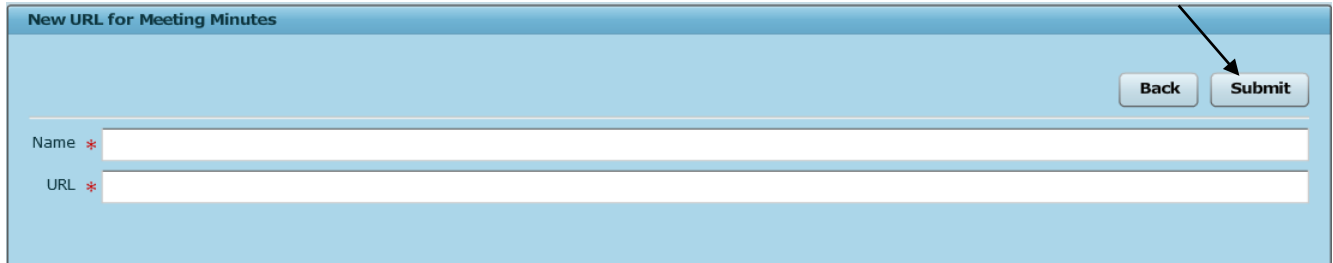
Documentation Type

- Conference Report
- Bank Statment
- Meeting Minutes
- References
- Case Record Form

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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



The screenshot shows a web form titled "New URL for Meeting Minutes". The form has a light blue header bar with the title. Below the header, there are two text input fields. The first field is labeled "Name *" and the second field is labeled "URL *". To the right of the input fields, there are two buttons: "Back" and "Submit". An arrow points to the "Submit" button.

New URL for Meeting Minutes

Back Submit

Name *

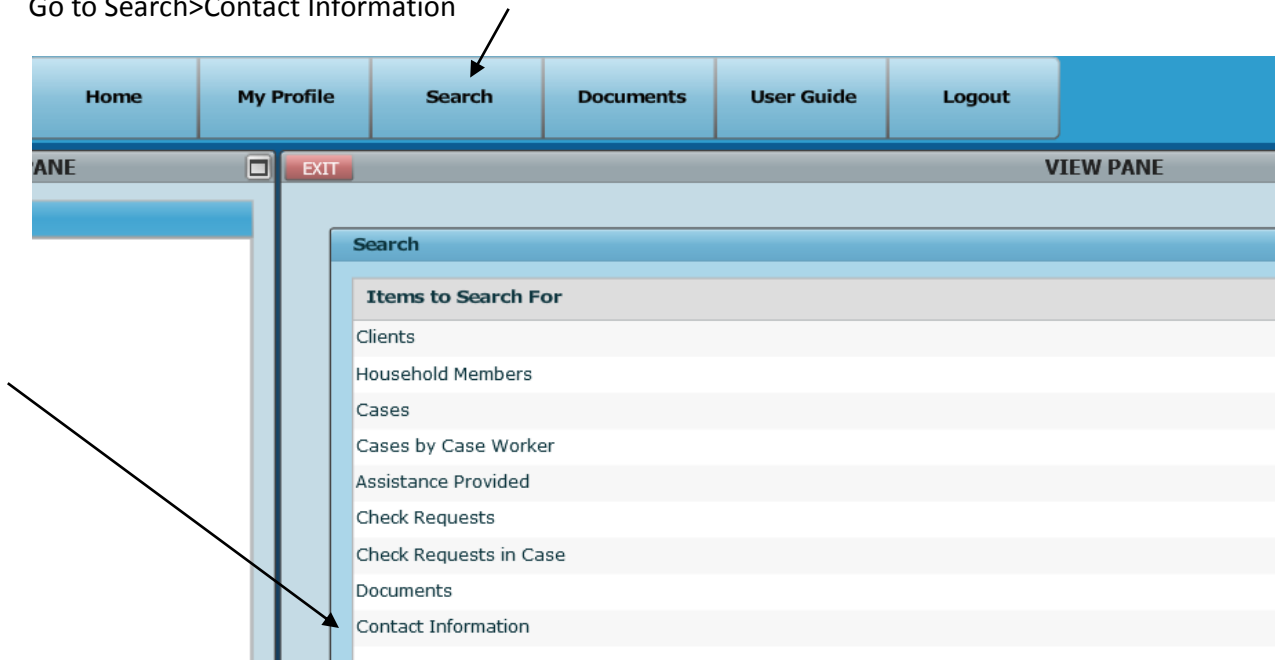
URL *

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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.

The screenshot shows the 'Contact Information' form. It includes a 'Conference' dropdown menu with 'St. Catherine of Sienna' selected. Below the dropdown are input fields for ID, First, Last, Email, State, and Zip. A table at the bottom displays search results with columns: Conference, Last, First, St, Zip, Username, Work, Home, Cell, and Email. An arrow points to the 'Conference' dropdown menu.

Conference	Last	First	St	Zip	Username	Work	Home	Cell	Email

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

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Click on the user in the search results grid

VIEW PANE

Contact Information

Back Clear Search

Note: After viewing an associate record, to return to the search, use the "Exit" button in the top left corner of the View Pane.

Conference: Test

ID:

Username:

First: janice Last: tester

Email:

State: State Zip:

Conference	Last	First	St	Zip	Username	Work	Home	Cell	Email
Test	Tester	Janice	GA	30000	jttester	770-928-7804			

Click the Change Password button

Associate Record

OK

Associate Roles Volunteer Tasks

Change Password Edit

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

Change Password

Back Submit

Username: jsigurdson

New Password:

Re-enter New Password:

Notify user of new password.

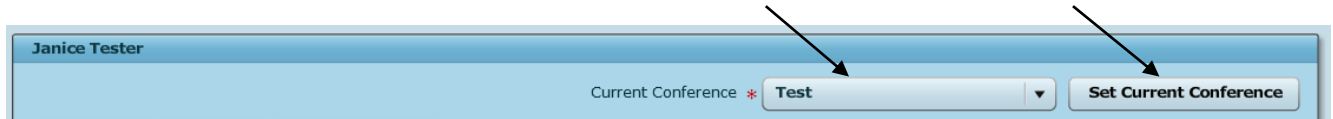
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Conference members need to know

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.

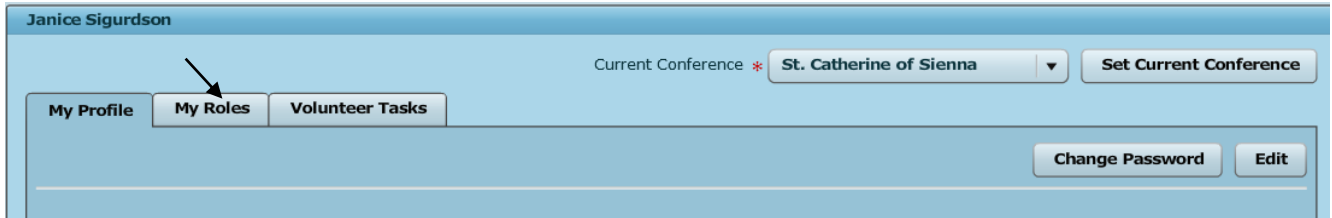
A screenshot of the 'My Profile' form. The form is titled 'Janice Tester' and has tabs for 'My Profile', 'My Roles', and 'Volunteer Tasks'. The 'My Profile' tab is active. At the top right of the form, there is a 'Current Conference' dropdown set to 'Test' and a 'Set Current Conference' button. Below this, there are two buttons: 'Change Password' and 'Edit'. The form contains several input fields: 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), and Zip (30000). An arrow points to the Email field.

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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.

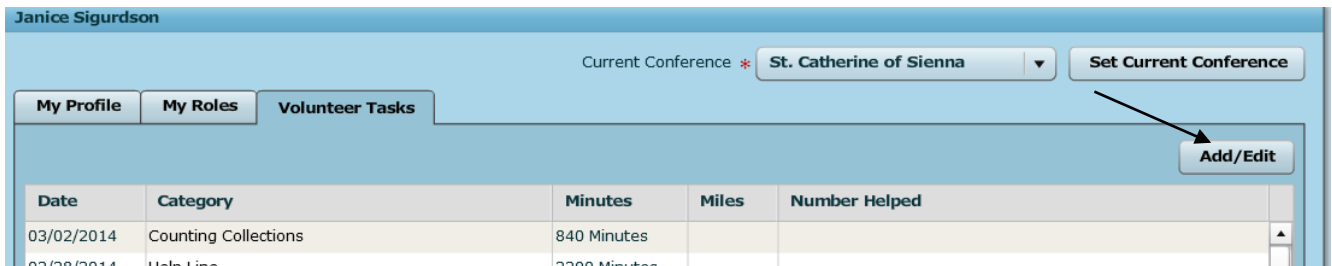


Volunteer Tasks



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.

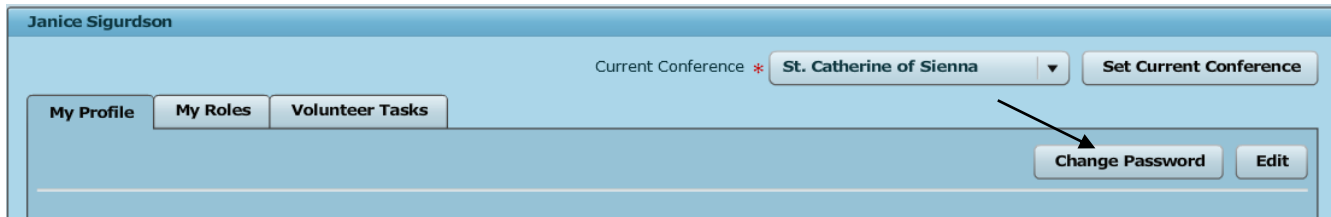


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User changing password

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.



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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:

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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