Convention Management System (CMS)

Local User Guide

March 2022
# Table of Contents

- Overview .................................................................................................................. 5
- CWA ID ......................................................................................................................... 6
- Look up CWA ID in Aptify .......................................................................................... 7
- Create a new CMS user account ................................................................................ 9
  - Verify your email address ....................................................................................... 10
  - Forgot your password ......................................................................................... 13
- Meeting Registration ................................................................................................. 16
- Register for the President Meeting ........................................................................... 20
- Register as a Delegate ............................................................................................... 21
  - Personal Registration Details ................................................................................ 21
  - Text Message Alert .............................................................................................. 21
  - Credential Type .................................................................................................... 21
  - Are you a chairperson? ........................................................................................ 22
  - Choose an Alternate .............................................................................................. 22
  - Bargaining Units Designation .............................................................................. 23
    - Yes, I am a chairperson ..................................................................................... 23
    - No, I am not a chairperson .............................................................................. 23
    - Neither ............................................................................................................... 23
  - Badge Information .................................................................................................. 24
  - Complete Registration Process ........................................................................... 25
  - President Meeting Registration Confirmation Email – Confirmed ...................... 26
- Register as an Alternate ............................................................................................. 27
  - Personal Registration Details ................................................................................ 27
  - Text Message Alert .............................................................................................. 27
  - Credential Type .................................................................................................... 27
  - Choose a Delegate .............................................................................................. 28
  - Badge Information ................................................................................................ 29
  - Complete Registration Process ........................................................................... 29
  - President Meeting Registration Confirmation Email – Confirmed ...................... 31
- Registration Details - Delegate .................................................................................. 32
- Registration Details - Alternate .................................................................................. 34
Registration Changes .................................................................................................................. 65

Edit registration ..........................................................................................................................65

Unregister ..................................................................................................................................67

Registration Status Change Email – Unregistered ................................................................. 68

Undo Delete .............................................................................................................................. 69

CMS User Account Changes .................................................................................................... 70

Change your CMS User Password ............................................................................................ 71

Need Help? ................................................................................................................................ 72

CWA Credentials ..................................................................................................................... 72

District Dues Specialists .......................................................................................................... 72
Overview

This year, everyone who will attend the President’s meeting will need to do it through the Convention Management System (CMS), which will ease the registration process, and allow all attendees to create their own personal accounts and register online.

When local officers log into the CMS, and link their CWA ID, they will have the ability to do the following:

1. View their local’s summary details
   - Local name, number, officers
   - Number of delegates to which the local is entitled
   - Local voting strength
   - Issues that affect a local and/or individual members
   - Registered participants
   - Proxy information
2. Register as a delegate or an alternate
3. Register guests
4. Manage registrations for your local (register, unregister, edit)
5. View your bargaining units
6. Assign voting strength to each delegate
7. Designate a chairperson
8. View, download, and print credentials
9. Assign a proxy (if eligible)
10. Manage local and/or individual issues that would prevent delegates from being seated at the President Meeting

If you need to make changes to your registration or someone’s registration from your local, the CMS will automatically create system notifications via email to let users know the status of their registration each time it is updated in the system.

Let’s get started!
***IMPORTANT***

**CWA ID**

Before you sign up for a new Convention Management System (CMS) user account, please make sure you have your CWA ID (Aptify ID).

If you don’t know your CWA ID, you can log into Aptify and look up your CWA ID. Instructions on how to look up your CWA in Aptify are in the next page.

After you set up a CMS user account, and you log into the system, you will be prompted to “enter your CWA ID.” By linking your ID, the CMS will identify you as a member of your local and grant you the appropriate permission level.

Local Officers have the maximum level of access, and the CMS will allow them to view all the information pertaining to their specific local.

Local Officers can register themselves for the President’s meeting, and they have the option to also register other people from their local. Please see the “Register Additional People in your Local” section.
Look up CWA ID in Aptify

1. Log into Aptify - portal-cwa.aptify.com. Enter your email address and password and click “log in.”

![Login screenshot]

Note: If you need to request an Aptify account, please fill out the New Aptify Account Request form [https://cwaunion.aidaform.com/new-aptify-user-account-request](https://cwaunion.aidaform.com/new-aptify-user-account-request)

2. Click on “search” located at the top in the tool bar.

![Search screenshot]
3. To perform a search you are required to enter search criteria in 2 fields. For example, your first name and last name. Then, click “search.”

You will notice “Results” will populate at the bottom of the page, the CWA ID, also known as the Aptify ID is located in the first column. That’s the ID you will need to register for the President’s meeting.
Existing CMS User Account

If you attended the CWA Convention and you already have a CMS user account, you do **not** need to create a new one, just go to [https://cms.cwa-union.org](https://cms.cwa-union.org) and log in with your existing credentials.

Create a New CMS User Account

1. To create a new Convention Management System (CMS) user account, click on this link or type it in your browser: [https://cms.cwa-union.org](https://cms.cwa-union.org). Then click “create account.”

2. Fill out your:
   - First name / Last name
   - Email address
   - Create a password / Confirm your password
   - Click “create account”
Verify your email address

3. Once you click “create account” you will need to verify your email address to activate your new CMS user account.
4. Check your email inbox, you should receive a message with a link to verify your email address. Click “link to e-mail address verification.”

Someone has created a CWA Convention Management System account with this email address. If this was you, click the link below to verify your email address.

Link to e-mail address verification

This link will expire within 1 day.

If you didn't create this account, just ignore this message.

Note: The link will expire within 1 day.
Note: If you do not see an email address verification email, please check your spam folder or you can “click here” to re-send the email.

Note: If an invalid email address configuration is entered, you will see the message below, please enter the correct email address to proceed.

Invalid email address.

If you entered the wrong email address, for example, there was a typo; you will not receive an email to verify your account. You will need to create a new account with the correct email address.

If you have any issues and/or questions, please email CWACredentials@cwa-union.org.
Forgot your password

1. If you forgot your password and you need to reset your password, go to https://cms.cwa-union.org and click “forgot password?”

2. You will be redirected to the screen below, where you can enter your email address and click “get new password.”
If you entered a valid email address, you should receive an email shortly.

3. Check your email inbox, you should receive an email to reset your password, please click "link to reset your password."

Note: The link will expire within 1 day.
4. After you click “link to reset your password,” the CMS will redirect you to a page where you will be prompted to create a “new password” and “confirm password.” Then click “submit.”

Note: After you click “submit,” the CMS will automatically log you into the system.
Meeting Registration

1. After you create your new CMS user account and click “link to e-mail address verification,” you will be automatically logged into the CMS to get started.

If you would like to register as a delegate or alternate for your local, or you need to assign a proxy, click “enter CWA ID” and enter your Aptify ID.

**IMPORTANT NOTE:** If you click “skip this step” instead of clicking “enter CWA ID,” you will only be able to register as CWA staff, a guest, or a vendor.
2. After you enter your CWA (Aptify) ID in the CWA ID field, click “search.”

3. Then verify the local displayed matches your CWA membership. If the information matches, please click on “yes, this is my local.”
**Note:** If the local name/number displayed does not match your local, please click “no, something is wrong” to re-enter your CWA (Aptify) ID.

Get Started

1. Link CWA ID
2. Verify
3. Select Convention

### Verify Local:

Please verify that the local displayed matches your CWA membership

TNG-CWA Local 1234  WASHINGTON-BALTIMORE

- YES, THIS IS MY LOCAL
- NO, SOMETHING IS WRONG

When you click “no, something is wrong,” the CMS will re-route you to the previous screen where you can click “enter CWA ID” to re-enter your CWA (Aptify) ID.
4. When you click “yes, this is my local” the system will show you a list of active meetings. Click on the meeting you would like to register for, in this instance the meeting you want to choose is 2022 President’s Meeting.

```
Convention Select

Please select a convention to view

ACTIVE INACTIVE

2021 Convention - New Orleans

2022 Presidents Meeting
```

5. If you entered the correct CWA ID and you chose the correct meeting you would like to register for, all the steps are completed and you are finished, please click “close.”

```
Get Started

Link CWA ID Verify Select Convention

All steps completed - you're finished

RESET CLOSE
```

*Note: If you would like to re-enter your CWA ID (Aptify ID), please click “reset.”*
Register for the President’s Meeting

If you followed the instructions above and linked your CWA ID your basic information should pre-populate automatically in the My Registration page.

Click on “My Registration” on the left hand side navigation and fill out the following information:

- First name / Middle name / Last name
- Email address / Primary phone number / Mobile number
- Text message alert – Please click “Yes” to OPT-IN to get President Meeting updates and other union-related news from CWA
- There are 5 credential types:
  - Delegate – Local delegate
  - Alternate – Local alternate
  - Guest – Meeting guest
  - Vendor – Meeting vendor
  - CWA Staff – Headquarters, district, local personnel staffing the meeting
- Badge nickname, country, state, city

If you linked your ‘CWA ID’ (Aptify ID) when you logged into the CMS, your basic information should be filled out already.
Register as a Delegate

If you followed the instructions above and linked your CWA ID, you should see your CWA ID, District # and Local # in the upper right hand corner; and your basic personal information should populate automatically in the My Registration page.

**Personal Registration Details**

1. Please verify your personal information is correct, or make the necessary edits you would like to reflect in your President’s Meeting registration details.

**Text Message Alert**

2. When registering for the President’s Meeting you will have the option to ‘OPT-IN’ to receive text message alerts regarding the President’s Meeting and union-related updates.

**Credential Type**

3. Choose the credential type “delegate” from the dropdown menu.
**Are you a chairperson?**

4. When registering as a *delegate* you will notice a new field will pop up where you can specify if you are a chairperson of the local, the system defaults to ‘no.’ If you are the chairperson of the local, click the down arrow in the ‘are you a chairperson?’ field and choose “yes.”

<table>
<thead>
<tr>
<th>Credential Type</th>
<th>Are you the Chairperson?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Choose an Alternate**

If you are a delegate who needs to choose an alternate you can do so by clicking the down arrow in the ‘choose alternate’ field.

Anyone who has registered as an alternate in your local will show up in the pull down menu, and you can choose one person.

*For example, for this local, a delegate can choose Fatima Hussein as an alternate.*

<table>
<thead>
<tr>
<th>Credential Type</th>
<th>Choose Alternate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Fatima Hussein</td>
</tr>
</tbody>
</table>

**Note:** If no one from your local has registered as an alternate, then the alternate field, would say ‘no alternate available.’

*Note: Only alternates who have registered will display in the alternate dropdown menu. If the person you would like to designate as your alternate is not registered, please contact your local.
Bargaining Units Designation

5. Since you linked your CWA ID, when registering as a delegate for the President Meeting, your bargaining units designation will populate automatically and display the most current Aptify data specific to your local. Please validate and confirm the information is correct.

<table>
<thead>
<tr>
<th>Bargaining Units Designation</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TNG &amp; Canada</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chairperson</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delegate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neither</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Yes, I am a chairperson**

If you choose “yes” because you are a chairperson, you will notice the bargaining units designation will automatically default to ‘chairperson.’

**No, I am not a chairperson**

If you choose “no” because you are not a chairperson, you will notice the bargaining units designation will automatically default to ‘delegate.’

**Neither**

In your bargaining units designation section, you may also select ‘neither.’
**Badge Information**

6. Please fill out the *badge information* section with the specifics you would like to print on your President Meeting badge:

**Badge nickname:** Type the name you would like to see on your badge.

*Note: The nickname must be a first name only because the badge has a size limit.*

**Badge country:** Choose the country you reside in, the system defaults to United States, but you can choose other countries by clicking the down arrow.

**Badge state/region:** Choose the state or region you would like to print on your badge. Click the down arrow and a state or region menu will populate based on the country you choose.

**Badge city:** Type the name of the city you would like print on your badge.

*Note: Generally, the city and state on the President Meeting badge reflects the geographic location of the member’s local. However, the person registering may choose the city and state they prefer to see printed.*
Complete Registration Process

7. When you finish entering all of your personal details, please click “register” to save the information and complete your President Meeting registration.

Notes

All of the fields in the My Registration page are required. If you click “register” without entering all of the information, the system will highlight the missing fields highlighted in red.

Please enter information in all the required fields and click “register” to proceed.
If you did not click the text message alert option to OPT-IN, after you click “register” you will see a message asking you ‘are you sure?’

Click “go back” to OPT-IN to receive text message updates from CWA or “confirm” to OPT-OUT and proceed.

**President Meeting Registration Confirmation Email – Confirmed**

Once you submit your registration, check your email inbox, you should receive a registration confirmation email with the following information:

- **Event name**: Meeting name
- **Attendee name**: Your name and CWA Local #
- **Credential Type**: Delegate
- **Registration status**: Confirmed

Hi David Smith,

This email is to notify you that the status of your convention registration has changed.

**Event**: 2022 President Meeting
**Attendee Name**: David Smith - 32035
**Credential Type**: Delegate
**Registration status**: Confirmed

You can view your registration by logging into the convention system [here](#).

Please contact us at [cwacredentials@cwa-union.org](mailto:cwacredentials@cwa-union.org) if you have any additional questions.

In Unity,
CWA Convention Management System

**Note**: If you do not see a registration confirmation email, please check your spam folder, or log back into the CMS to view your registration details.
Register as an Alternate

If you followed the instructions above and linked your CWA ID, you should see your CWA ID, District # and Local # in the upper right hand corner; and your basic personal information should populate automatically in the My Registration page.

**Personal Registration Details**

1. Please verify your personal information is correct, or make the necessary edits you would like to reflect in your President Meeting registration details.

2. When registering for the President Meeting you will have the option to ‘OPT-IN’ to receive text message alerts regarding President Meeting and union-related updates.

**Text Message Alert**

3. Choose the credential type “alternate” from the dropdown menu.
Choose a Delegate

4. After you choose the credential type alternate, a new field called choose delegate(s) will appear.

Click the down arrow in the choose delegate(s) field, and a list of delegates from your local, who registered for the President Meeting will display in the pull down menu.

To choose a delegate, click on any of the names that populate in the menu.
**Badge Information**

5. Please fill out the *badge information* section with the specifics you would like to print on your President Meeting badge:

*Badge nickname:* Type the name you would like to see on your badge.

*Note:* The nickname must be a first name only because the badge has a size limit.

*Badge country:* Choose the country you reside in, the system defaults to United States, but you can choose other countries by clicking the down arrow.

*Badge state/region:* Choose the state or region you would like to print on your badge. Click the down arrow and a state or region menu will populate based on the country you choose.

*Badge city:* Type the name of the city you would like to print on your badge.

*Note:* Generally, the city and state on the President Meeting badge reflects the geographic location of the member’s local. However, the person registering may choose the city and state they prefer to see printed.

---

**Complete Registration Process**

6. When you finish entering all of your personal details, please click “register” to save the information and complete your President Meeting registration.
Notes

All of the fields in the My Registration page are required, if you click “register” without entering all of the information, the system will highlight the missing fields highlighted in red.

Please enter information in all the required fields and click “register” to proceed.

If you did not click the text message alert option to OPT-IN, after you click “register,” you will see a message pop up asking you ‘are you sure?’

Click “go back” to OPT-IN to receive text message updates from CWA or “confirm” to OPT-OUT and proceed.
President Meeting Registration Confirmation Email – Confirmed

Once you submit your registration, check your email inbox, you should receive a registration confirmation email with the following information:

- **Event name**: Meeting name
- **Attendee name**: Your name and CWA Local #
- **Credential Type**: Alternate
- **Registration status**: Confirmed

Hi Joe Smith,

This email is to notify you that the status of your convention registration has changed.

**Event**: 2022 President Meeting  
**Attendee Name**: Joe Smith - 32035  
**Credential Type**: Alternate  
**Registration status**: Confirmed

You can view your registration by logging into the convention system here.

Please contact us at cwacredentials@cwa-union.org if you have any additional questions.

In Unity,  
CWA Convention Management System
Registration Details - Delegate

After you click “register,” you can view all of ‘My Registration’ details in the Registration Details page.

- Personal Details
  - Name / Email / Phone (primary/mobile)
- Credential Type
  - Delegate
  - Chairperson
  - Alternate
  - Bargaining units
- Local Bargaining Units
  - Bargaining Units / Vote share / Designation
- Registration Status
- Badge Information
  - Badge # / Nickname / Country / State / City / Type
- Registration Issues
  - Issue title / Status / Date opened / Date closed

***IMPORTANT NOTE***

Registering on the CMS does not in itself guarantee that any individual or their local is in good standing and able to be seated at the President Meeting or any other official meeting.

It is therefore critical that Local officers check the REGISTRATION ISSUES section and resolve any items listed there prior to arriving at the event.

Since most issues of good standing are resolved prior to the President Meeting, the CMS will allow registration to proceed and a credential to be issued – however, unresolved issues will still prevent a delegate from being seated by the Credentials Committee.

To resolve any local and/or individual issues, please contact CWACredentials@cwa-union.org.
For example, a delegate registration details would look like this:
Registration Details - Alternate

After you click “register,” you can view all of ‘My Registration’ details in the Registration Details page.

- Personal Details
  - Name / Email / Phone (primary/mobile)
- Credential Type
  - Alternate
  - Chairperson - No
  - Alternate – N/A
  - Bargaining units – N/A
- Registration Status
- Badge Information
  - Badge # / Nickname / Country / State / City / Type
- Registration Issues
  - Issue title / Status / Date opened / Date closed

***IMPORTANT NOTE***

Registering on the CMS does not in itself guarantee that any individual or their local is in good standing and able to be seated at the President Meeting or any other official meeting.

It is therefore critical that Local officers check the REGISTRATION ISSUES section and resolve any items listed there prior to arriving at the event.

Since most issues of good standing are resolved prior to the President Meeting, the CMS will allow registration to proceed and a credential to be issued – however, unresolved issues will still prevent a delegate from being seated by the Credentials Committee.

To resolve any local and/or individual issues, please contact CWACredentials@cwa-union.org.
For example, an alternate registration details would look like this:

**Personal Details**
- Name: Joe Smith
- Email: Joe@Alternate.com
- Primary Phone: (555) 555-5555
- Mobile Phone: (333) 333-3333

**Text Message Alert**
- Yes, I want to receive conference updates and other unique alerts from CWA.

**Credential Type**
- Type: Alternate
  - Ask you the Chairman: N/A
  - Alternate: N/A
  - Regarding Wills: N/A
Navigation Menu

The left navigation menu will help local officers navigate through the CMS and includes the modules below, and we will explain each one in the following pages.

- Home
- My Registration
- Registration Search
- Local Summary
- My Account
- Contact Us
**Home Page/Local Summary**
The *Home Page* and *Local Summary* pages include information pertaining to your local for the current President Meeting, such as:

- Local name and number
- Local Officers
- Delegate entitlement
- Local average votes (Local voting strength)
- Local and/or individual issues
- Registered participants
- Proxy information
- Bargaining units

**My Registration**
After you log into the system and choose a meeting and you register, you can click “My Registration” to register for a meeting or review your meeting registration.

**Registration Search**
View and search all members who belong to your local.

**Local Summary**
View information pertaining to your local for each particular meeting.

**My Account**
Edit CMS user account information, such as email, first name, last name and password.

**Contact us**
Contact information (phone and email address) for any questions or concerns related to the meeting you are attending.
Local Summary

The Local Summary page includes all the pertaining information for your local in connection with the meeting you selected:

- Local name and number
- Names of local officers (President, Vice President, Secretary-Treasurer, Secretary or Treasurer)
- Delegate entitlement and count
- Local average (voting strength)
- Local issues (if there are any) – Individual and/or Local issues
- Download credentials
- Registered delegates / alternates/ guests / unregistered records
- Bargaining units

Note: All of the data in the CMS is synced with our Aptify membership system on a nightly basis, and reflects the most current data.

Local name / Local number / Local Officers / Delegate Entitlement and Count / Local Average

Local and/or individual issues summary includes the date the issues were open and close, as well as the status Resolved/Unresolved.
**Registration Issues**

To increase transparency and efficiency, the *Local Summary* page, includes a *Local Issues* section, where individual members and locals can easily identify if there are any concerns, disputes, or problems that have pending solutions, and must be resolved or granted an exception prior to the start of the President Meeting. If you have any local and/or individual issues, please email CWACredentials@cwa-union.org to determine next steps.

**No Issues – Good standing**

When a member who **does not** have any issues, the member’s personal registration details will show a registration status as ‘registered’ and the *Registration Issues* section will be blank.

![Registration Details]

If you see this in your personal registration details, it means you are in good standing and there are no individual issue(s) associated with your CWA membership record. Everything is in order and no action is required.
**Individual Issues - Member**

An *individual issue* refers to any problem that may be blocking a member from being able to come to the President Meeting, check-in at registration, and pick up the appropriate badge credentials.

***IMPORTANT***

*A member’s individual registration issue(s) must be resolved prior to the start of the President Meeting. The CMS will allow CWA members to complete the online President Meeting registration with the understanding that members must proactively work with the CWA Credentials Committee to resolve the issue(s) prior to President Meeting check-in on site.*

There may be cases when CWA Credentials Committee grants a member’s individual registration issue(s) an exception to allow them to attend the President Meeting, check-in, pick up their badge, and participate in the President Meeting proceedings.

**Unresolved Individual Registration Issue**

When a member has an individual issue associated with the CWA membership record, the member’s personal registration details will show a registration status as ‘registered,’ but the Registration Issues section will list the issue(s) that must be resolved prior to the President Meeting.

*For example,* a member who has an ‘inactive’ status registers as a delegate for the President Meeting, the member’s personal registration details will show the status as ‘registered,’ but the Registration Issues section indicates there is an issue titled *MemberNot Active*, with an Unresolved status, and the issue was opened on 6/25/21. The member should email CWACredentials@cwa-union.org to remediate the issue prior to the start of the President Meeting.
**Resolved Individual Registration Issue**

When a member’s individual registration issue is resolved, the CMS will update the issue’s status automatically.

*For example*, a member registered, but there is a MemberNotActive issue in their President Meeting registration details. The member reached out to CWACredentials@cwa-union.org, and the issue was resolved.

So the next time the member logs into the CMS, the personal registration status will still show as ‘registered,’ and the Registration Issues section will indicate the issue titled MemberNotActive, now has a with an **Resolved** status, and the issue was closed on 7/12/21. No further action is required.
Individual Issue Exception

At times, the CWA Credentials Committee may determine a member’s individual registration issue warrants an exception, once the exception is captured in the CMS, the issue’s status will update automatically.

For example, a member registered, but there is a MemberNotActive issue in their President Meeting registration details. The member reached out to CWACredentials@cwa-union.org, and an exception was issued to unblock the registration.

So the next time the member logs into the CMS, the personal registration status will still show as ‘registered,’ and the Registration Issues section will indicate the issue titled MemberNot Active, now has a with an Exception status. No further action is required.

Note: In summary, to check-in and participate in the President Meeting, a member who has an individual registration issue(s) must be granted an exception and/or the issue(s) must be resolved prior to the start of the President Meeting.
**Local Issues**

A local issue refers to any problem that may be blocking a local from being in good standing by the time the President Meeting starts.

***IMPORTANT***

A local’s registration issue(s) must be resolved prior to the start of the President Meeting. The CMS will allow members of the local to complete the online President Meeting registration with the understanding that the local must proactively work with the CWA Credentials Committee to resolve the issue(s) prior to President Meeting check-in on site.

There may be cases when CWA Credentials Committee grant a local’s registration issue(s) an exception to allow the local’s members to attend the President Meeting, check-in, pick up their badge, and participate in the President Meeting proceedings.

CWA interprets any of the following as a local/member registration issue:

<table>
<thead>
<tr>
<th>Issues</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td>LocalNotActive</td>
<td>Local is not active</td>
</tr>
<tr>
<td>LocalDelinquent</td>
<td>Local is delinquent</td>
</tr>
<tr>
<td>MemberNotActive</td>
<td>Member is not active</td>
</tr>
<tr>
<td>LocalNoOfficers</td>
<td>Local has no active officer assignments</td>
</tr>
<tr>
<td>LocalNoPresident</td>
<td>Local has no active president assignments</td>
</tr>
<tr>
<td>LocalNoSecretary</td>
<td>Local has no active secretary assignments</td>
</tr>
<tr>
<td>LocalNoChair</td>
<td>Local has no assigned chair</td>
</tr>
<tr>
<td>BargainingUnitNoChair</td>
<td>Bargaining unit has no assigned chair</td>
</tr>
<tr>
<td>BargainingUnitNoDelegate</td>
<td>Bargaining unit has no assigned delegate</td>
</tr>
<tr>
<td>LocalCarryingTooManyProxies</td>
<td>Local is carrying too many proxies</td>
</tr>
<tr>
<td>DelegateOrAlternateRegisteredForProxiedLocal</td>
<td>Local proxied has registered delegate or alternate</td>
</tr>
<tr>
<td>Other</td>
<td>Manually added issues</td>
</tr>
<tr>
<td>LateRegistration</td>
<td>Attendee registered after credential cutoff date</td>
</tr>
<tr>
<td>LocalCarryingTooManyDelegates</td>
<td>Local has registered too many delegates</td>
</tr>
<tr>
<td>Alternates exceed Delegates</td>
<td>Local has registered too many alternates</td>
</tr>
</tbody>
</table>

*Note: Local issues are automatically initiated by the CMS based on the most current Aptify data, except for the “Other-manual” type, which is manually added for a specific reason by CWA headquarters.*
Local and individual member issues are detailed in the *Local Summary page*, in the upper right-hand corner in the *Local Issues* section.

Local officers are able to view both local and individual member registration issues. The *Local Issues* section will list the following:

- Issue title
- Issue status – *Unresolved / Resolved / Exception*
- Member name – individual issues only
- Date issues was opened
- Date issue was closed

**Note:** You can differentiate a local issue from an individual issue because a member’s individual registration issue will have the person’s name listed under the Name column, see above – John Smith.

**REMINDER:** Local and individual issues must be resolved and/or granted an exception prior to the start of the President Meeting.
**Download Local Credentials**

As a local officer, you can download and/or print all of your local’s Credentials by clicking the “download credentials” button.

**Registered Members**

You can click on the delegate, alternate, guest, and unregistered tabs to view pertaining President Meeting registration information for each of those credential types. As well as proxy, total votes, individual issues and badge information.

**Delegate tab** - Anyone who registered as a delegate would be listed in this tab.

**Alternate tab** - Anyone who registered as an alternate would be listed in this tab.

**Guest tab** - Anyone who registered as a guest would be listed in this tab.

**Unregistered tab** - Anyone who registered and then unregistered would be listed in this tab.
**Bargaining Units**

The bargaining units section will only reflect information for people who have already registered for the President Meeting.

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Vote Share</th>
<th>TAG &amp; Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>John</td>
<td>Doe</td>
<td>Not Checked In</td>
<td>117</td>
<td>117</td>
</tr>
<tr>
<td>2</td>
<td>Jane</td>
<td>Johnson</td>
<td>Not Checked In</td>
<td>117</td>
<td>117</td>
</tr>
</tbody>
</table>

**Meeting Checked-in Status**

**Vote share and BU allocation**
Download Individual Credentials

If you registered as a Delegate, you can download your credentials from the Registration Details page, click “download credentials” in the upper right-hand corner.

Note: If someone registers as an alternate, they will not have the option to ‘download credentials,’ the button will be disabled.

After clicking “download credentials,” the system will generate a PDF document in a new window, which will include the following information:

- Date / Meeting name / City / State / Date
- Your name / Denote – chairperson and/or delegate with an “X”
- CWA Local # / Vote share # / Local Officers / Bargaining units

Note: You may download/save or print your President Meeting credentials by clicking the icons on the upper right-hand corner of the PDF document.
### Download/Print Local Credentials

If you would like to download all President Meeting credentials for your local, go to the Local Summary page, and click on “download credentials.”

<table>
<thead>
<tr>
<th>Local Summary</th>
<th>Home / Local Search / 32035</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TNG-CWA Local 32035-WASHINGTON-BALTIMORE</strong></td>
<td></td>
</tr>
<tr>
<td>Local Number: 32035</td>
<td></td>
</tr>
<tr>
<td>President: Fatima Hussein</td>
<td>Delegate Entitlement: 6</td>
</tr>
<tr>
<td>Secretary: David DeJesus</td>
<td>Delegate Count: 2</td>
</tr>
<tr>
<td>Treasurer: Justin Moyer</td>
<td>Alternate Count: 0</td>
</tr>
<tr>
<td>Local Average: 1910</td>
<td></td>
</tr>
</tbody>
</table>

After clicking “download credentials,” the system will generate a PDF document in a new window with all of the President Meeting credentials for your local. Both delegates and alternates have the ability to download/print credentials for their local.

You may download or print credentials by clicking on the icons in the upper right-hand corner.
**Local Registration Search**

As a local officer, when you log into the current President Meeting in the CMS you can click on ‘registration search’ in the left navigation menu, and view, search, and filter through any records pertaining to your local.

**Specific Records Search**

If you would like to search for specific member records, you may enter any of the following:

- First name - *free text*
- Last name - *free text*
- CWA ID - *digits only*
- Local # - *digits only*
- Email address - *free text*
- Member Status – *pull down menu (multiple choices)*
  - Active / Inactive
- Credential type - *pull down menu (multiple choices)*
  - Delegate / Alternate / Guest / Vendor / CWA Staff / Other

Type text and/or digits into any of the fields above, or pick a choice from the pull down menus, and click “search” to display results.

**Note:** You can click “reset” to clear all fields.
**View Local Membership Registration Statuses**

The *Registration Search page*, will display a comprehensive summary report of everyone in your local, which includes the following information:

- CWA ID / First Last / Last Name / Local # (your local # only)
- Credential type – If the member registered for the meeting, you can see the type of credential
- Registration Status
- Member Status
- Email address

*Note: You can click on “rows per page” and choose 10, 15 or 100 to display more records per page.*
Sort Registration Search Results

You may click on any column header (listed below) in the registration search results to sort the summary report by that particular field.

- CWA ID / First / Last / Last Name / Local # (your local # only)
- Credential type – If the member registered for the meeting, you can see the type of credential
- Registration Status
- Member Status
- Email address

For example, if the system is showing the summary report below, and you would like to sort by last name, you click on the column header “Last Name.”

Original results:

<table>
<thead>
<tr>
<th>CWA ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Local Number</th>
<th>Credential Type</th>
<th>Registration Status</th>
<th>Status</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Results sorted by last name:

<table>
<thead>
<tr>
<th>CWA ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Local Number</th>
<th>Credential Type</th>
<th>Registration Status</th>
<th>Status</th>
<th>Email</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
**Search Results Column Headers**

If you would like to tailor the summary report column headers, click on the **three-vertical bars icon**, right above the header row, *see red arrow below.*

When you click on the columns icon, a menu will pop-up with a list of all the column headers. All of the columns are included (checked-off) by default. You may choose as many or as few columns as you wish to see in your report and, and the columns will shift accordingly.

**Customize Column Headers**

To customize the column headers in your summary report, you can choose the ones you want to exclude in your summary report, click on the names you would like to omit. You will notice the checkmark will disappear, and the report will reflect the changes immediately.

*For example, if you want do not want to see the Local number and Email columns, you can click on the blue checkmark, and the checkbox will turn white.*

*Notice how the report on the left has fewer columns.*
Filter Registration Search Results

If you would like to filter your local’s summary report table, click on the upside down triangle icon right above the column headers, see red arrow below.

A new window will pop-up, and you can type free text into any field:

- First name
- Last name
- CWA ID
- Local #
- Email address
- Member Status – type *Active or Inactive*
- Credential type – type any of the following:
  - Delegate
  - Alternate
  - Guest
  - Vendor
  - CWA Staff
  - Other

Note: You can click “reset” to clear all fields.
For example, you would like to filter for all the members named ‘David’ in your local.

Original results:

Type ‘David’ in the First Name field, and the list on the left will automatically show you the results with your filter specifications. The words you are filtering by, will also show up right above the column headers.

Results filtered by members with first name ‘David’:

Close Filter Pop-Up Box
When you are done entering your filters, and you would like to get back to your Registration Search results, click the “X” in the upper right-hand corner to close the filter pop-up box.

Note: The search results with the filter criteria you entered will not clear when you close the filter pop-up box.
For example, if you want to search all the members in your local with an ACTIVE status, so you can see who registered for the President Meeting – click the down arrow in the Status field, and choose ACTIVE, then click “search.”

Result: The registration search shows several pages of members with an ACTIVE status, but only 1 member – David Smith has registered for the President Meeting.

Clear Search Fields
If you made a mistake or would like to clear all search fields to search for something else, click “reset.”
Register people from your local

CMS users who have local officer permission/role have the ability to register multiple people from their local from the Registration Search page. There are a couple of ways for local officers to register people from their own CMS user account.

**Searching for members to register**

You can follow any of the steps search steps in Registration Search section above to find the people in your local who have not registered.

**Individual member search and registration**

If you are looking for one specific member, you can search for that person individually by entering their first/last names, email or CWA ID and then click “search.”

*For example, if I want to find a member named Andrew Smith with an active member status, enter that information in the search fields.*

Then click “search,” and the search results will appear in the lower section of the Registration Search page.

*Important Note: In the example above, please note that the search results populated an active result, but Andrew Smith is a non-member, which would make him ineligible to participate in the President Meeting.*

*If Andrew Smith is in fact a member, please make sure you update his status in Aptify, and the CMS will automatically reflect the change the next day. If you go ahead and register Andrew Smith as a non-member, the CMS will allow it, but an individual registration issue will be generated – which needs to be remediated prior to the start of the President Meeting.*
Choose the row for Andrew Smith, and click it with your mouse.

The system will open a brand new registration page with Andrew Smith populated in the first name and last name fields.

Enter the rest of the information in the registration page, choose the appropriate credential type, and click “register” to complete the process.
You will notice that now Andrew Smith is registered and his registration status changed to ‘registration confirmed.’ If you want to register additional members, repeat the same process.

As mentioned above, since Andrew Smith’s status is non-member-active-active, when you look at his registration details – you will notice the President Meeting registration status is ‘Registered’ and CMS created an individual registration issue. The individual issues needs to be resolved or the CWA Credentials committee will need to issue an exception prior to the President Meeting, so Andrew Smith will be allowed to check-in and receive a badge.
Multiple member search and registration

To search for multiple members, choose your search criteria and follow the steps in the ‘Filter Registration Results’ section.

For example, you can search for members with a ‘not registered’ registration status, then repeat the process detailed for an individual member registration for each one.

Note: A local officer does not have to register everyone in their local, each person can register individually by creating their own CMS account.
Proxy voting

The following instructions are intended to provide guidance to locals composed of less than 200 members concerning proxy voting procedures and requirements in accordance with the CWA Constitution, ARTICLE XXIV:

“There shall be no voting by proxy, except that a local composed of less than 200 members may assign its vote to a delegate from another local attending the Convention. No local shall be allowed to vote more than one such assignment."

Elections for a delegate who will carry another local's proxy must be conducted in accordance with federal law, including a secret ballot vote.

Assign a Proxy

If you need to choose a proxy for your local, you do not need to complete the registration process.

1. Create a CMS user account and make sure you link your CWA (Aptify) ID to your profile, so your local information will be associated appropriately. (Follow instructions each of those sections above)

2. From the Local Summary page, if your local is eligible, you should see an “assign proxy” button, click on it.

3. A window will pop-up, enter the local number you would like to choose as a proxy, and click “continue.”
4. If the local you entered belongs to your district and/or your sector, you should see the screen below, click the down-arrow in the ‘select a delegate’ field.

**Assign Proxy**

![Assign Proxy Screen](image)

*Please select a proxy to attend in place of a local delegate.*

**Note:** Only delegates who have registered for the President Meeting will display in the drop down menu to select from. If the person you would like to designate is not registered, please let their local delegation know.

Choose Delegate for LOCAL 1000 CWA

![Select Delegate](image)

5. Choose a delegate from the list, and click “submit.”
Then, you will see a ‘Success’ confirmation screen, and the CMS will automatically send an email to the delegate you assigned a proxy. To exit out of this screen, click the “X.”

If you have any questions, concerns, or need further assistance, please email CWACredentials@CWA-union.org.

Assign Proxy

![Assign Proxy Image]

Success!

An email has been sent to notify the delegate you assigned a proxy to. If you have any questions or concerns, please contact us at CWACredentials@CWA-union.org for more help.

Once the local accepts the proxy and CWA Credential approves, the proxy will be recorded in the Delegate’s personal registration details and it will be reflected in the Local Summary’s page.

In the example above, CWA Local 51018 chose delegate Amy Lafferty from CWA Local 1000 as their proxy. The proxy delegation is reflected in local 1000’s ‘Local Summary’ page. Delegate Amy Lafferty will also receive an email regarding the proxy request and the proxy designation will be added to her personal President Meeting registration details.
Note: If the local you entered to be your proxy is not in your district and/or your sector, you will see an error message that says ‘Local not eligible.’ Please make sure you enter a new local number that meets the proxy requirement and click “continue.”
Logout of the CMS

To logout of the CMS, click the down arrow in the upper right hand-corner (next to your name) and choose "logout."
Registration Changes

**Edit registration**

1. If you need to make any changes to your meeting registration, click on the following link [https://cms.cwa-union.org](https://cms.cwa-union.org) and log into the CMS.

2. You can view your registration details in the *Home* or *My Registration* page, click “edit registration” in the upper right-hand corner.
3. The system will redirect you to the registration page, where you can edit any field necessary. When you finish making changes to your registration, click “update” to save the changes.
**Unregister**

1. If you need to unregister, click on the following link https://cms.cwa-union.org and log into the CMS.

2. Go to the Home or My Registration page, and click “unregister” in the upper right-hand corner.

3. The system will ask you “are you sure you wish to unregister this attendee?”

   **Note:** If you do not wish to unregister, click “cancel,” and you will navigate back to the Registration Details page.
If you would like to unregister, click “confirm,” and you will navigate back to the Registration Details page, where you can see your registration status has changed to ‘unregistered.’

**Registration Status Change Email – Unregistered**

When you unregister, you will receive a registration status change email with a new ‘unregistered’ registration status.

Hi David Smith,

This email is to notify you that the status of your convention registration has changed.

Event: 2022 President Meeting  
Attendee Name: David Smith - 32035  
Credential Type: Delegate  
Registration status: Unregistered

You can view your registration by logging into the convention system here.

Please contact us at cwacredentials@cwa-union.org if you have any additional questions.

In Unity,  
CWA Convention Management System
**Undo Delete**

1. If you made a mistake and you did not mean to unregister from the meeting, click on the following link [https://cms.cwa-union.org](https://cms.cwa-union.org) and log into the CMS.

2. Go to the Home or My Registration page, and click “undo delete” in the upper right-hand corner.

The system will navigate back to the Registration Details page, where you can see your registration status has changed to from ‘unregistered’ (see above) to ‘registered.’
CMS User Account Changes

1. If you would like to make changes to your CMS user account, please click on the following link [https://cms.cwa-union.org](https://cms.cwa-union.org) and log into the CMS.

2. On the left-hand side Navigation Menu, click on “My Account.”

3. You will be redirected to the ‘Edit Account’ page, where you can make changes to your CMS user account:
   - Email address
   - First name
   - Last name

4. Once you make the necessary changes, click “Save.”

*Note: If you do not want to save the changes, click “cancel.”*
**Change your CMS User Password**

1. If you would like to make changes to your CMS user password, click “password” on the left-hand side menu.

2. Enter the following information:
   - Current password
   - New password
   - Confirmation: Re-enter your new password

3. Once you make the necessary edits, click “save” to capture the changes.

**Note:** If you change your mind and you do not want to change your CMS user password, click “back to CMS system” in the upper right-hand corner to return to the Home/My Registration page.

When you finish making all of the changes to your CMS user account, click “sign out” in the upper right-hand corner to logout of the system.
Need Help?

**CWA Credentials**
If you have any additional questions or need help navigating the CMS, please contact CWACredentials@cwa-union.org.

**District Dues Specialists**
You can also contact your District’s Dues Specialist or Coordinator, you may view a complete list with contact information by going to the following link:

https://cwa-union.org/sites/default/files/duescoordinators.pdf