



Convention Management System (CMS)

**Convention
Local User Guide**

February 2023

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Overview

Convention is CWA's most important mechanism for union governance. CWA is committed to developing tools that will ensure we conduct our union business in an efficient, accurate, and focused manner. Maintaining the integrity of our meeting keeps the focus on the Convention outcomes instead of the mechanics. Reliable methods for registering delegates and assigning voting strength increase our members' trust in our decisions and elections.

We launched the new web-based Convention Management System (CMS) a couple of years ago, which eases the registration process, and allow all attendees to create their own personal accounts and register online.

As a local officer, when you log into the CMS, and you link your CWA ID, you have the ability to do the following:

1. View your 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 Convention

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.

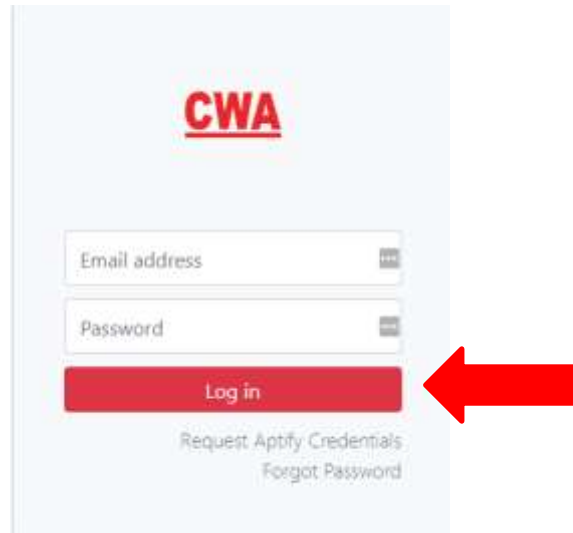
After you set up a CMS user account, and you log into the system, you will be prompted to **“enter your CWA ID.”** By linking your ID, the CMS will identify you as a Local Officer and grant you the appropriate permission level.

In your case, once you link your CWA ID, you will have the *Local Officer permissions/role*, which gives you the maximum level of access, and allows you to view all the information pertaining to your specific local.

As a Local Officer, you can register yourself for Convention, and you have the option to also register other people from your local. Please see the *“Register Additional People in your Local”* section.

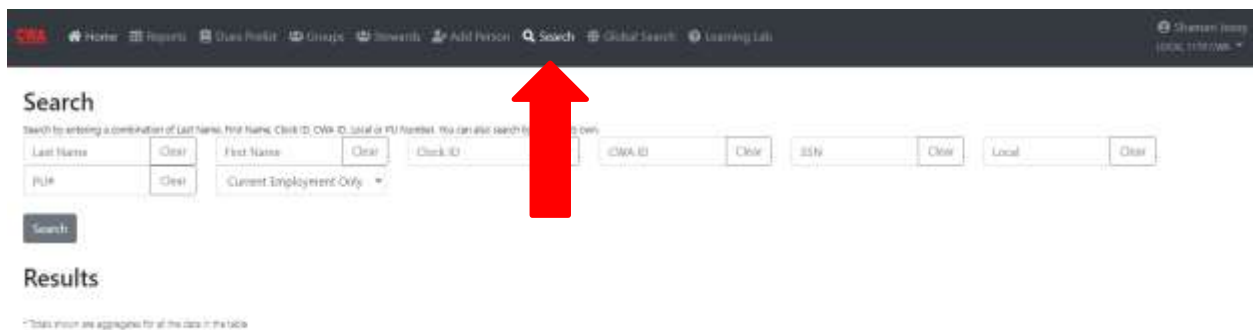
Look up CWA ID in Aptify

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

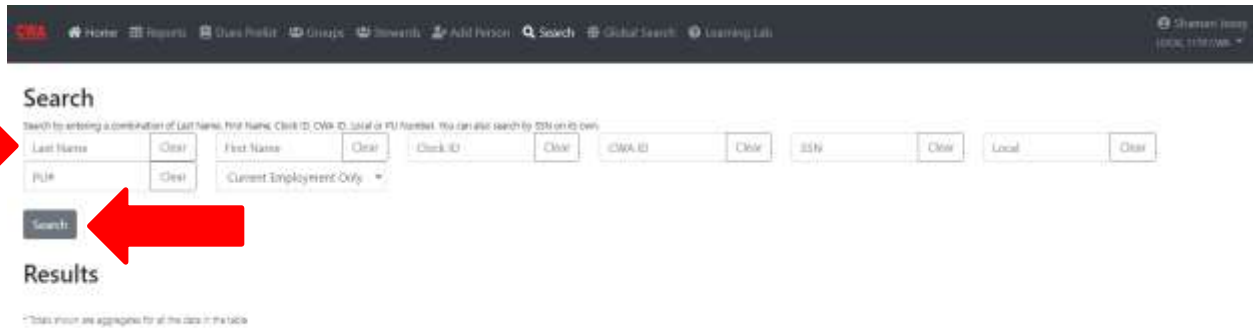


Note: If you need to request an Aptify account, please fill out the New Aptify Account Request form - <https://cwaunion.aidaform.com/new-aptify-user-account-request>

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



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.**”



The screenshot shows the CWA Search interface. At the top is a navigation bar with links: Home, Reports, Data Portal, Groups, Members, Add Person, Search, Global Search, and Learning Lab. The Search section has a header "Search" and a sub-header "Search by entering a combination of Last Name, First Name, Click ID, CWA ID, Local or PU Number. You can also search by SSN on its own." Below this are input fields for Last Name, First Name, Click ID, CWA ID, SSN, and Local, each with a "Clear" button. There is also a "PU#:" field and a "Current Employment Only" dropdown menu. A "Search" button is located below the input fields. A red arrow points to the "Search" button, and another red arrow points to the "Last Name" input field.

Search

Search by entering a combination of Last Name, First Name, Click ID, CWA ID, Local or PU Number. You can also search by SSN on its own.

Last Name: Clear First Name: Clear Click ID: Clear CWA ID: Clear SSN: Clear Local: Clear

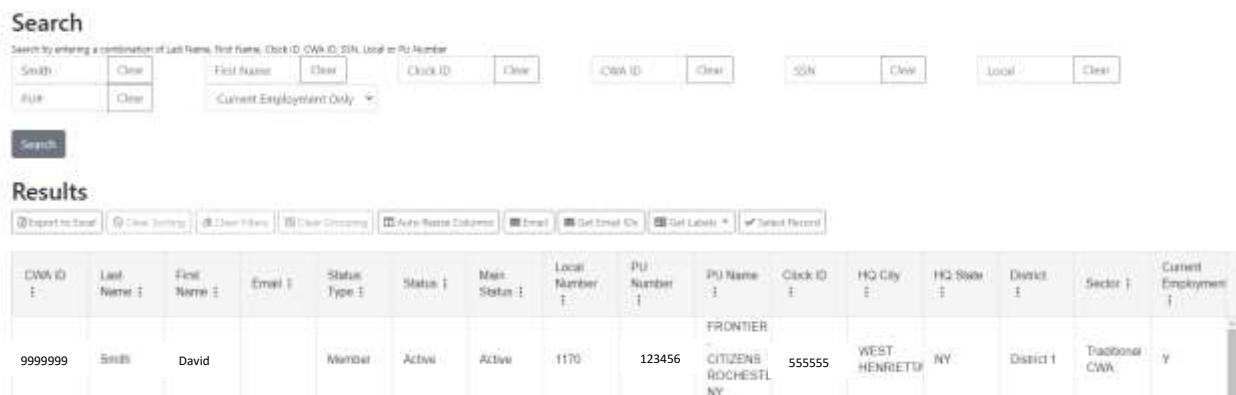
PU#: Current Employment Only:

Search

Results

* Totals shown are aggregates for all the data in the table

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 Convention.



The screenshot shows the CWA Search Results interface. At the top is a navigation bar with links: Home, Reports, Data Portal, Groups, Members, Add Person, Search, Global Search, and Learning Lab. The Search section has a header "Search" and a sub-header "Search by entering a combination of Last Name, First Name, Click ID, CWA ID, SSN, Local or PU Number". Below this are input fields for Last Name, First Name, Click ID, CWA ID, SSN, and Local, each with a "Clear" button. There is also a "PU#:" field and a "Current Employment Only" dropdown menu. A "Search" button is located below the input fields. The Results section has a header "Results" and a sub-header "Results". Below this is a table with columns: CWA ID, Last Name, First Name, Email, Status Type, Status, Main Status, Local Number, PU Number, PU Name, Click ID, HQ City, HQ State, District, Sector, and Current Employment. A red arrow points to the CWA ID column.

Search

Search by entering a combination of Last Name, First Name, Click ID, CWA ID, SSN, Local or PU Number

Last Name: Clear First Name: Clear Click ID: Clear CWA ID: Clear SSN: Clear Local: Clear

PU#: Current Employment Only:

Search

Results

Report to Excel Clear Settings Clear Filter Clear Grouping Auto Refresh Disabled Email Get Email Ck Get Labels Select Record

CWA ID	Last Name	First Name	Email	Status Type	Status	Main Status	Local Number	PU Number	PU Name	Click ID	HQ City	HQ State	District	Sector	Current Employment
9999999	Bridith	David		Member	Active	Active	1170	123456	FRONTIER CITIZENS ROCHESTER NY	555555	WEST HENRIETTA NY	NY	District 1	Traditional CWA	y

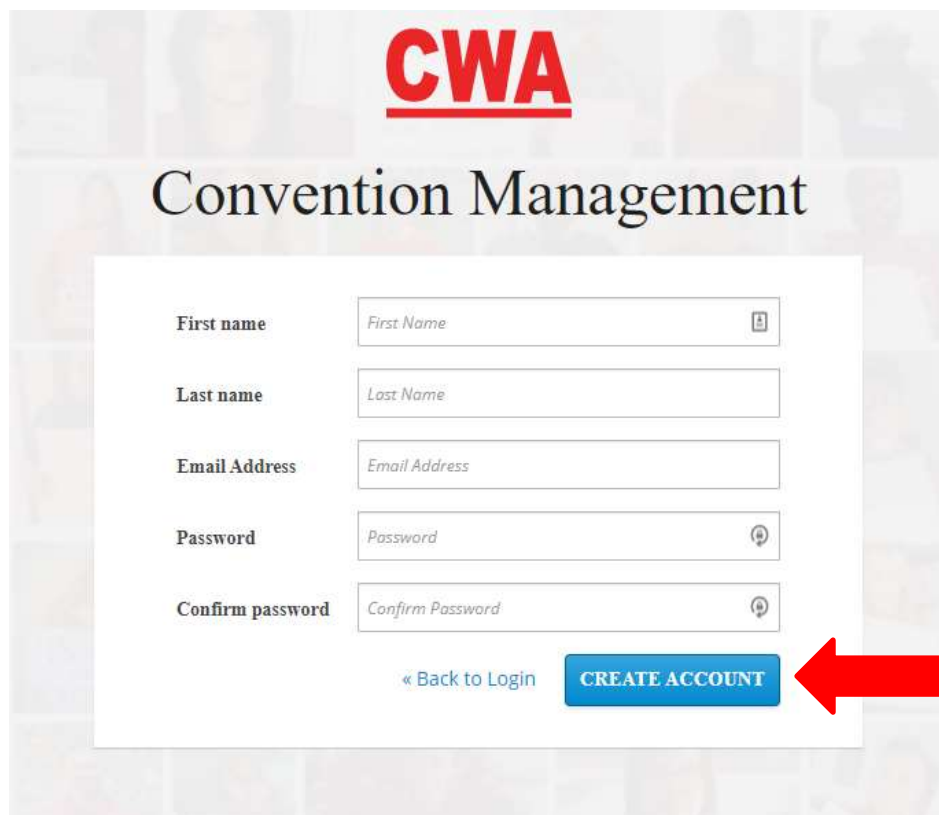
Create a New CMS User Account

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>. Then click “**create account**.”



The screenshot shows the CWA Convention Management login page. At the top is the CWA logo in red. Below it is the title "Convention Management". The login form has two input fields: "Email Address" and "Password". To the right of the form are links: "New user? Create Account" and "Problem Logging In? Contact Us". Below the form are links: "Forgot Password?" and a blue "LOG IN" button.

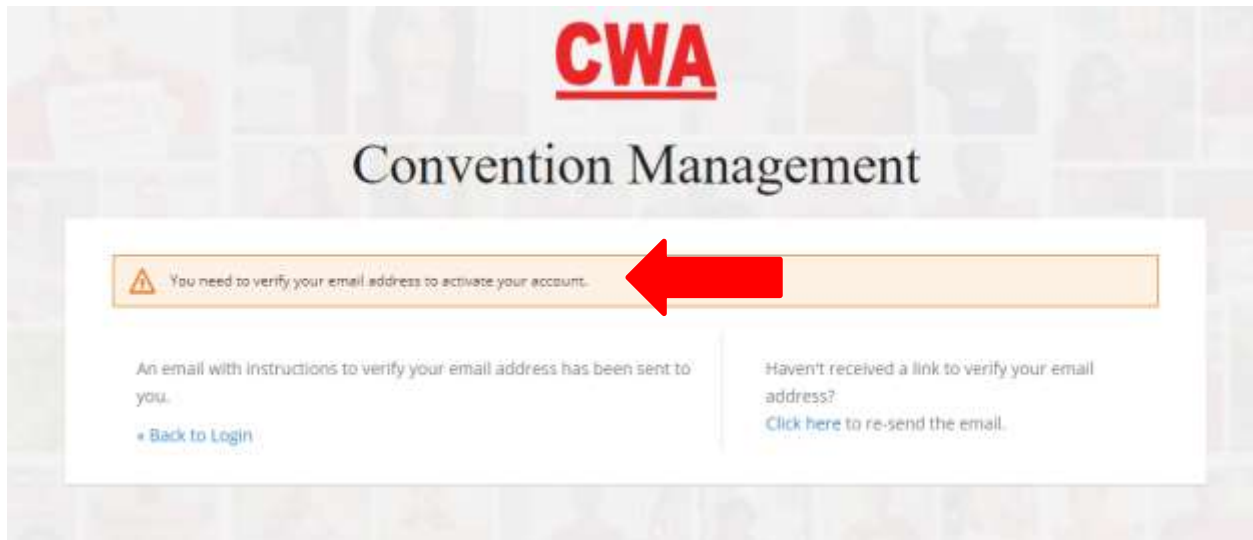
2. Fill out your:
 - First name / Last name
 - Email address
 - Create a password / Confirm your password
 - Click “**create account**”



The screenshot shows the CWA Convention Management account creation page. At the top is the CWA logo in red. Below it is the title "Convention Management". The form has five input fields: "First name", "Last name", "Email Address", "Password", and "Confirm password". Each field has a placeholder text and a small icon (eye or person) to its right. Below the form are two links: "« Back to Login" and a blue "CREATE ACCOUNT" button. A red arrow points to the "CREATE ACCOUNT" button.

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](#)

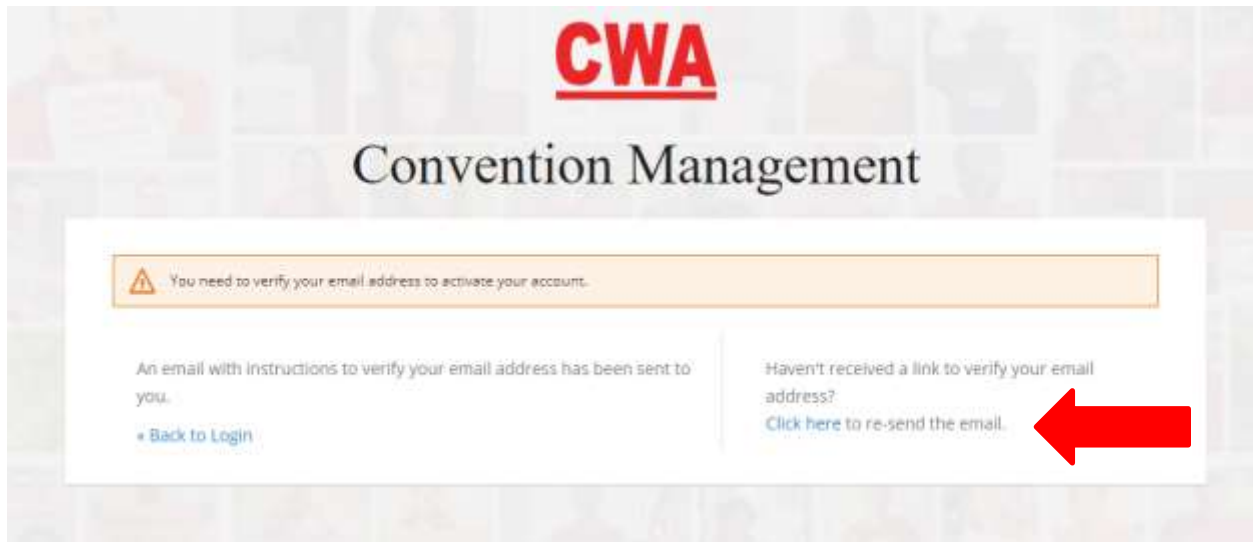


This link will expire within 1 day.

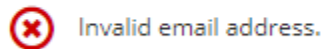
If you didn't create this account, just ignore this message.

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 on “**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.

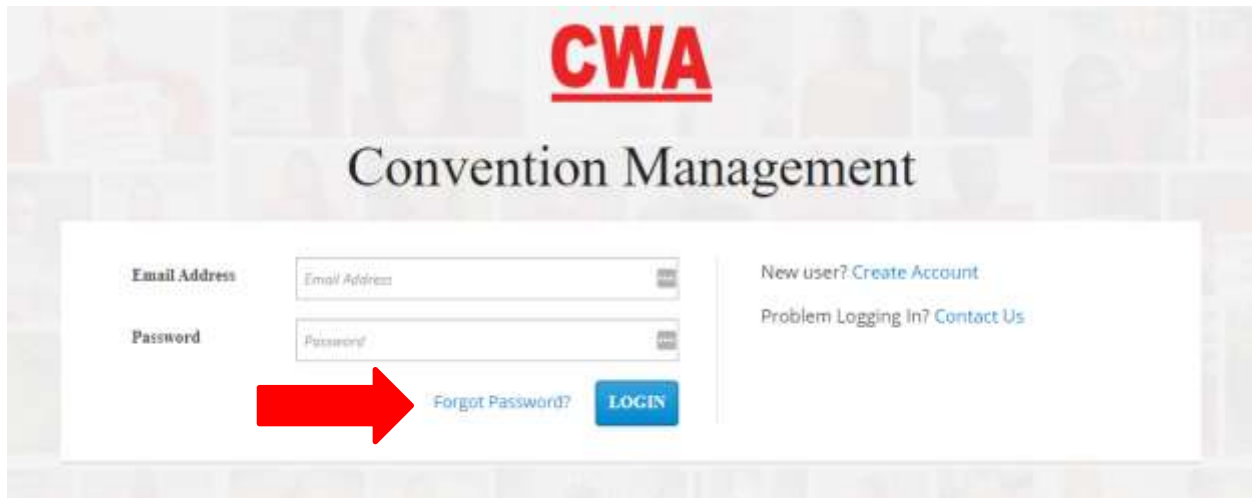


If you entered the wrong email address, for example, there was a typo; you will not receive an email to verify your account. You will need to create a new account with the correct email address.

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?**”



CWA
Convention Management

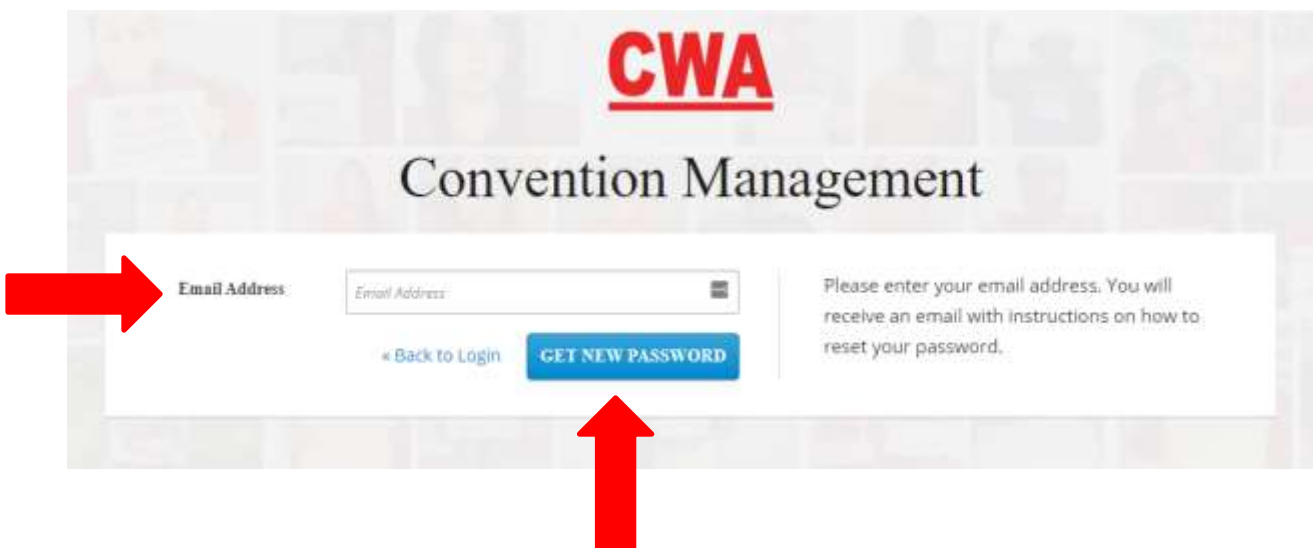
Email Address:

Password:

[Forgot Password?](#) [LOGIN](#)

New user? [Create Account](#)
Problem Logging in? [Contact Us](#)

2. You will be redirected to the screen below, where you can enter your email address and click “**get new password.**”



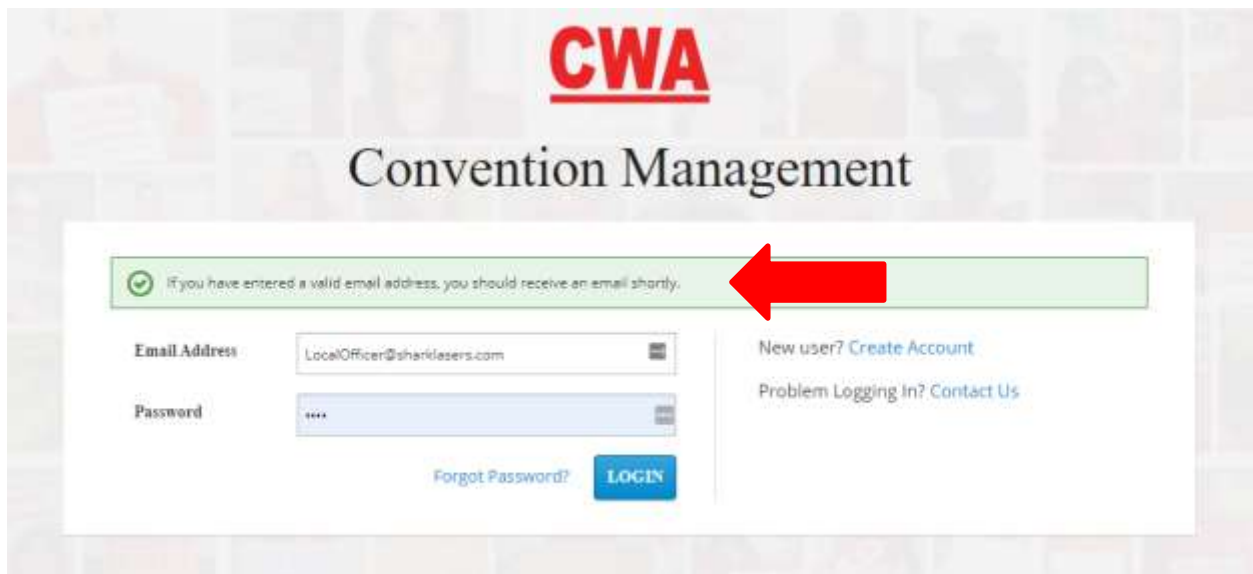
CWA
Convention Management

Email Address:

[Back to Login](#) [GET NEW PASSWORD](#)

Please enter your email address. You will receive an email with instructions on how to reset your 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.”**

Reset password Inbox x

CWA Union <donotreply@cwa-union.org>
to me ▾

Someone just requested to change your CWA Convention Management System account's password. If this was you, click on the link below to reset them.

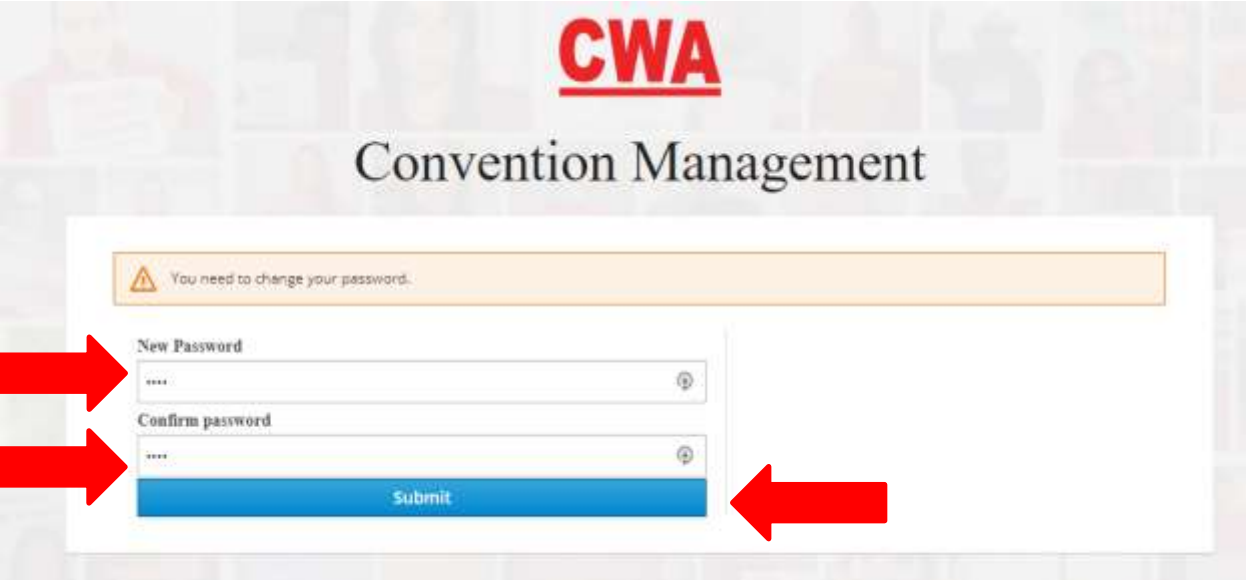
[Link to reset password](#)

This link will expire within 1 day.

If you don't want to reset your password, just ignore this message and nothing will be changed.

***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 to where you will be prompted to create a “*new password*” and “*confirm password*.” Then click “**submit**.”



The screenshot shows the CWA Convention Management interface. At the top, the text "CWA" is in large red letters, followed by "Convention Management" in black. Below this is a yellow warning box with a triangle icon and the text "You need to change your password..". The main form area contains two input fields: "New Password" and "Confirm password", both with masked text (dots) and a small circular icon to the right. A blue "Submit" button is located below these fields. Three red arrows are overlaid on the image: two on the left pointing to the "New Password" and "Confirm password" fields, and one on the right pointing to the "Submit" button.

***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.

Get Started

1

Link CWA ID


2

Verify

3

Select Convention

In order to register as a delegate or alternate, or to register other people for convention as a local officer, enter your CWA ID on the next step. If you skip this step, you will still be able to register as Staff, a Guest, or a Vendor.



ENTER CWA ID

SKIP THIS STEP

*****IMPORTANT*****

*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.**”

Get Started

1 Link CWA ID — 2 Verify — 3 Select Convention

CWA ID
12345

SEARCH

GO BACK

3. Then verify the local displayed matches your CWA membership. If the information matches, please click on “**yes, this is my local.**”

Get Started

✓ 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

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

✓ 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.

Get Started

1 Link CWA ID — 2 Verify — 3 Select Convention

In order to register as a delegate or alternate, or to register other people for convention as a local officer, enter your CWA ID on the next step. If you skip this step, you will still be able to register as Staff, a Guest, or a Vendor.

ENTER CWA ID

SKIP THIS STEP

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, always choose the current year’s Convention.

Convention Select

×


Please select a convention to view

ACTIVE

INACTIVE

2022 Presidents Meeting

2023 - Convention - St Louis (July 2023)



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, 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 CWA Convention

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 Convention updates and other union-related news from CWA
- There are 5 credential types:
 - **Delegate** – Local Convention delegate
 - **Alternate** – Local Convention delegate
 - **Guest** – Convention guest
 - **Vendor** – Convention vendor
 - **CWA Staff** – Headquarters, district, local personnel staffing the Convention
- Badge nickname, country, state, city

*****IMPORTANT*****

*If you linked your ‘CWA ID’ (Aptify ID) your name and personal information should automatically appear in the “My Registration” page. If you are registering someone else, **DO NOT** change the name in the “My Registration” page. See “Register Attendees from your Local” section in this document and follow instructions.*

CWA Convention System

Convention Training 2021 - Table 3

LOCAL OFFICER

My Registration

Home / My Registration

1234
661158

DISTRICT #
District 3-15

12345
32335

First Name
Local

Middle Name

Last Name
Officer

Email Address
LocalOfficer@cwa.org

Primary Phone Number
(555) 555-5555

Mobile Number
(555) 555-5555

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.
Messages & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Delegate
Alternate
Guest
Vendor
CWA Staff

Badge Nickname

Badge State/Region

Badge City

REGISTER

Check - Yes

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.



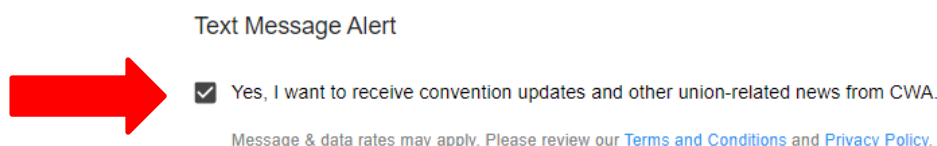
Personal Registration Details

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



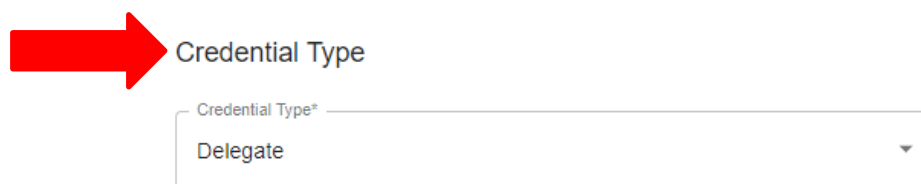
Text Message Alert

2. When registering for Convention you will have the option to 'OPT-IN' to receive text message alerts regarding Convention 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, the system defaults to 'no.' If you are the chairperson, click the down arrow in the 'are you a chairperson?' field and choose "yes."

Credential Type

Credential Type*	Are you the Chairperson?
Delegate	No Yes




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.

Credential Type

Credential Type*	Are you the Chairperson?	Choose Alternate
Delegate	No	



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.

Credential Type

Credential Type*	Are you the Chairperson?	Choose Alternate
Delegate	No	Fatima Hussein



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

Credential Type

Credential Type*	Are you the Chairperson?	Choose Alternate
Delegate	No	No Alternates 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 Convention, 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.

Bargaining Units Designation

TNG & Canada

☐ Chairperson

☒ Delegate

☐ Neither

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*.’

Credential Type

Credential Type: Delegate

Are you the Chairperson? YES

*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

TNG & Canada

☒ Chairperson

☐ Delegate

☐ Neither

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*.’

Credential Type

Credential Type: Delegate

Are you the Chairperson? No

*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

TNG & Canada

☐ Chairperson

☒ Delegate

☐ Neither

Neither

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

Bargaining Units Designation

TNG & Canada

☐ Chairperson

☐ Delegate

☒ Neither

Badge Information

6. Please fill out the *badge information* section with the specifics you would like to print on your Convention 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 character 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.

Badge Information

Badge Nickname* Dave	Badge Country* United States	Badge State/Region* DC	Badge City* Washington
-------------------------	---------------------------------	---------------------------	---------------------------

Note: Generally, the city and state on the Convention 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.

For example, a delegate badge will print like this:



Complete Registration Process

- When you finish entering all of your personal details, please click “**register**” to save the information and complete your Convention registration.

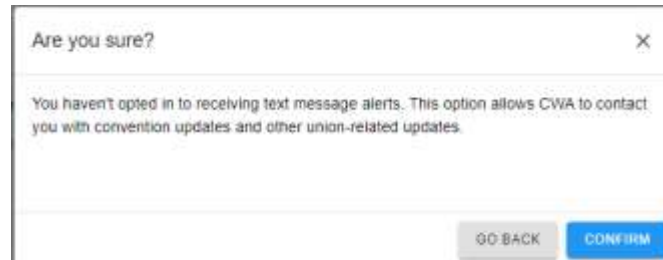
REGISTER

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.*

First Name*	John	Last Name*	Smith
Email Address*		Primary Phone Number*	
<small>Email is required</small>		<small>Primary Phone is required</small>	
Mobile Number*			
<small>Mobile Number is required</small>			
Text Message Alert			
<input type="checkbox"/> Yes, I want to receive convention updates and other union-related news from CWA.			
<small>Message & data rates may apply. Please review our Terms and Conditions and Privacy Policy.</small>			
Credential Type			
Credential Type*			
<small>Credential Type is required</small>			
Badge Information			
Badge Nickname*	Badge Number*	Badge State/Region*	Badge City*
<small>Badge Nickname is required</small>	<small>Badge Number is required</small>	<small>Badge State is required</small>	<small>Badge City is required</small>
REGISTER			

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.

Convention 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: **CWA Convention**
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 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.



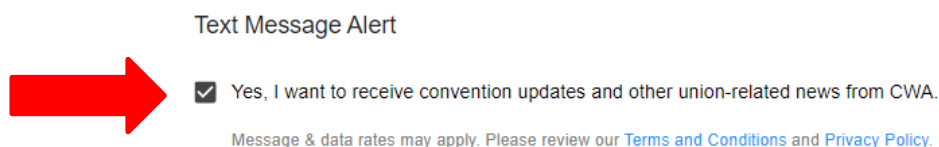
Personal Registration Details

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



Text Message Alert

2. When registering for Convention you will have the option to 'OPT-IN' to receive text message alerts regarding Convention and union-related updates.



Credential Type

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.

Credential Type

Credential Type*

Alternate

Choose Delegate(s)

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

Credential Type

Credential Type*

Alternate

Choose Delegate(s)

Badge Information

☐ David Dejesus

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

Choose Delegate(s)

David Dejesus

☒ David Dejesus

Badge Information

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

Badge Information

Badge Nickname Joe	Badge Country United States	Badge State/Region DC	Badge City Washington
-----------------------	--------------------------------	--------------------------	--------------------------

Complete Registration Process

6. When you finish entering all of your personal details, please click “**register**” to save the information and complete your Convention 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.

The screenshot shows a registration form with the following fields and their status:

- First Name***: John (filled)
- Last Name***: Smith (filled)
- Email Address***: (empty, highlighted in red)
- Primary Phone Number***: (empty, highlighted in red)
- Mobile Number***: (empty, highlighted in red)
- Text Message Alert**: ☐ Yes, I want to receive convention updates and other union-related news from CWA. (Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).)
- Credential Type***: (empty, highlighted in red)
- Badge Information**:
 - Badge Nickname***: (empty, highlighted in red)
 - Badge Number***: (empty, highlighted in red)
 - Badge State/Region***: (empty, highlighted in red)
 - Badge City***: (empty, highlighted in red)
- REGISTER**: (blue button)

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?’

The dialog box titled “Are you sure?” contains the following text:

You haven't opted in to receiving text message alerts. This option allows CWA to contact you with convention updates and other union-related updates.

At the bottom, there are two buttons: **GO BACK** (grey) and **CONFIRM** (blue).

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

Convention 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: **CWA Convention**

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*****

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 Convention 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 Convention, 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

[Home](#) / [My Registration](#) / 718

[EDIT REGISTRATION](#)[DOWNLOAD CREDENTIALS](#)

UNREGISTER

NA ID12345NA ID1105DISTRICT #District 2-13LOCAL NUMBER32035

Personal Details

Name: David Smith

Email: LocalOfficerTest1@shankiasers.com

Primary Phone: (202) 123-4567

Mobile Phone: (202) 568-7589

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.

Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type: Delegate

Are you the Chairperson: No

Alternate: N/A

Bargaining Units: D---TNG & Canada

Local Bargaining Units

DATA FIELD	VALUE	DESIGNATION
Vote Share	1800	Delegate

Registration Details

Registration Status: Registered

Badge Information

Badge #: 780019

Nickname: Dave

Country: United States

State/Region: DC

City: Washington

Type: Delegate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found			

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*****

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 Convention 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 Convention, 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:

Registration Details

[Home](#) / [My Registration](#) / 727

[EDIT REGISTRATION](#)[DOWNLOAD CREDENTIALS](#)

UNREGISTER

1234559

DISTRICT #
District 2-13

LOCAL NUMBER
32035

Personal Details

Name:	Joe	Joe@Alternate.com
Email:	Lathita@Cwa-21906.org	
Primary Phone:	(555) 555-6565	
Mobile Phone:	(555) 555-6565	

Text Message Alert

☒ Yes, I want to receive convention updates and otheration related news from CWA.

Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type:	Alternate
Are you the Chairperson:	No
Alternate:	N/A
Bargaining Units:	N/A

Registration Details

Registration Status: Registered

Badge Information

Badge #:	250067
Nickname:	Joe
Country:	United States
State/Region:	DC
City:	Washington
Type:	Alternate

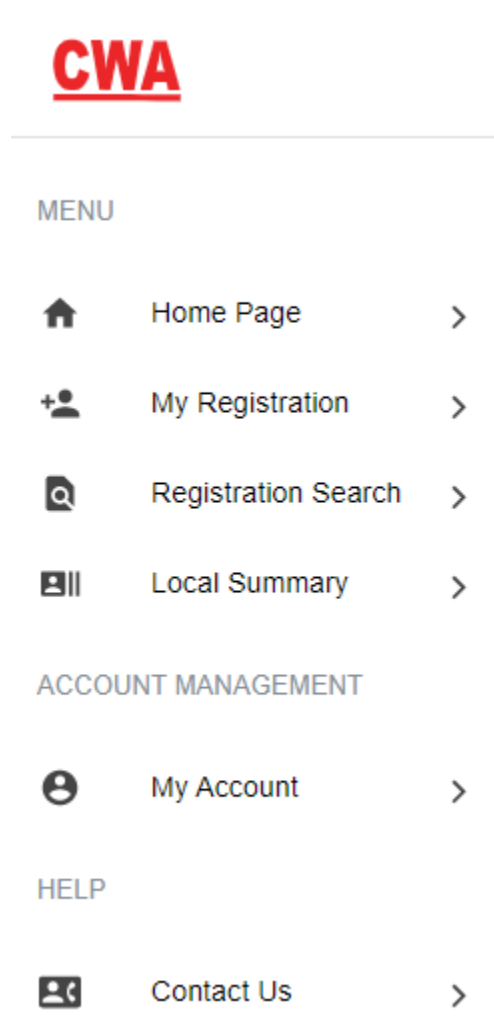
Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found.			

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 CWA Convention, 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 / deleted 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

The screenshot shows the 'Local Summary' page. At the top left, there is a breadcrumb trail: 'Home / Local Search / 1234'. Below this, the page title 'Local Summary' is displayed. A red arrow points from the text box above to the local name and number section. This section shows 'TNG-CWA Local' with a red 'x' icon and 'WASHINGTON-BALTIMORE'. Below this, the 'Local Number' is '1234'. A table lists local officers: President John Doe (Delegate Entitlement: 6), Secretary Jane Doe (Delegate Count: 2), and Treasurer John Smith (Alternate Count: 0). At the bottom, the 'Local Average' is '234'. To the right, there is a 'Local Issues' section with a table of issues.

ISSUE TITLE	STATUS	NAME	DATE OPENED	DATE CLOSED
BargainingUnitNoChair	Resolved		June 30, 2021, 6:25 PM	June 30, 2021, 10:30 PM
LocalDelinquent	Unresolved		June 30, 2021, 6:25 PM	
LocalNoChair	Resolved		June 30, 2021, 6:25 PM	June 30, 2021, 10:30 PM

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 Convention. If you have any local and/or individual issues, 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

Registration Status: Registered



Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
-------------	--------	-------------	-------------



Sorry, no matching records found			
----------------------------------	--	--	--



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 Convention, 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 CWA Convention. The CMS **will allow** CWA members to complete the online Convention registration with the understanding that members must proactively work with the CWA Credentials Committee to **resolve the issue(s) prior to Convention 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 Convention, check-in, pick up their badge, and participate in the Convention 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 Convention.

For example, a member who has an 'inactive' status registers as a delegate for the CWA Convention, 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 Convention.

Registration Details			
Registration Status:		Registered	
Registration Issues			
ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
MemberNotActive	Unresolved	June 25, 2021, 11:19 AM	



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 Convention 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 **MemberNot Active**, now has a with an **Resolved** status, and the issue was closed on 7/12/21. No further action is required.

Registration Details

Registration Status: Registered



Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
MemberNotActive	Resolved	June 25, 2021, 11:19 AM	July 12, 2021, 7:05 PM





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 Convention 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.

Registration Details			
Registration Status:		Registered	
Registration Issues			
ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
MemberNotActive	Exception	June 25, 2021, 12:12 PM	



Note: *In summary, to check-in and participate at the CWA Convention, 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 Convention.*

Local Issues

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

*****IMPORTANT*****

*A local's registration issue(s) must be resolved prior to the start of the CWA Convention. The CMS **will allow** members of the local to complete the online Convention registration with the understanding that the local must proactively work with the CWA Credentials Committee to **resolve the issue(s) prior to Convention 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 Convention, check-in, pick up their badge, and participate in the Convention proceedings.

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

- **Bargaining unit has no assigned chair**
- **Bargaining unit has no assigned delegate**
- **Local has no active president assignments**
- **Local has no active secretary assignments**
- **Local has no assigned chair**
- **Local is delinquent**
- **Other (manual)**

***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

Local Issues

ISSUE TITLE	STATUS	NAME	DATE OPENED	DATE CLOSED
LocalDelinquent	Unresolved	Both Local issues	June 18, 2021, 1:46 PM	
LocalNoPresident	Resolved		June 18, 2021, 1:46 PM	July 7, 2021, 2:21 PM
MemberNotActive	Unresolved	John Smith	July 1, 2021, 11:48 AM	



Member issue

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 grated an exception prior to the start of the Convention.

Local Credentials and Registered Members

As a local officer, you can download and/or print all of your local's Credentials by clicking the **"download credentials"** button.

DOWNLOAD CREDENTIALS

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

Delegate tab



Default sort: Chair / Last Name / First Name										
BADGE NICKNAME	CWA ID	PROXY	CHAIRPERSON	FIRST NAME	LAST NAME	BADGE CITY	BADGE STATE	TOTAL VOTES	INDIVIDUAL ISSUES	BADGE #
John	777777		Yes	John	Doe	Nageroy	MD	117		780007

Alternate tab



Default sort: Chair / Last Name / First Name										
BADGE NICKNAME	CWA ID	PROXY	CHAIRPERSON	FIRST NAME	LAST NAME	BADGE CITY	BADGE STATE	TOTAL VOTES	INDIVIDUAL ISSUES	BADGE #
Jane	555555		No	Jane	Johnson	Nageroy	MD	117		780008

Guest tab

No one has registered as a guest for this local, but if there was a registered *Guest*, it would be listed in this tab.

DELETE



DELETE

Default sort: Chair / Last Name / First Name

BADGE NICKNAME	CWA ID	FIRST NAME	LAST NAME	BADGE CITY	BADGE STATE	TOTAL VOTES	INDIVIDUAL ISSUES	BADGE #
Sorry, no matching records found								

Unregistered tab

Anyone who registered and then unregistered would be listed in this tab.



Default sort: Chair / Last Name / First Name										
BADGE NICKNAME	CWA ID	PROXY	CHAIRPERSON	FIRST NAME	LAST NAME	BADGE CITY	BADGE STATE	TOTAL VOTES	INDIVIDUAL ISSUES	BADGE #
SABE	999999		No	SABBARA	SANHAJI	WASHINGTON	DC			781255

Bargaining Units

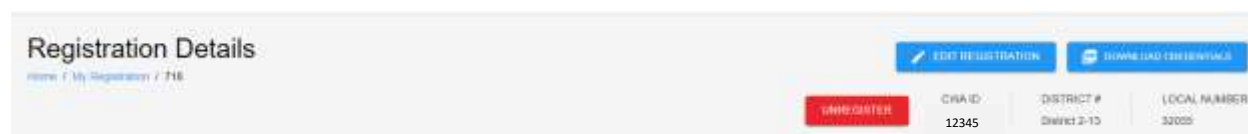
The bargaining units section will only reflect information for people who have already registered for the Convention.

Bargaining units' information is sorted by Chair / Last Name / First

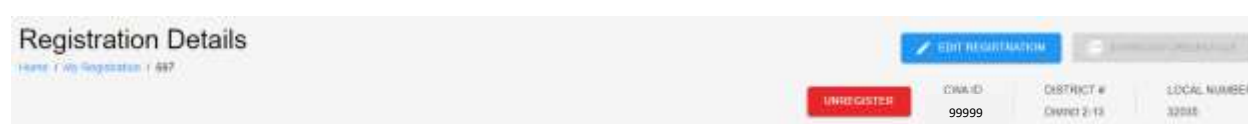
CWA ID	FIRST NAME	LAST NAME	STATUS	PROXY	VOTE SHARE	TNU & CANADA
777777	John	Doe	Not Checked in	—	117	117
555555	Jane	Johnson	Not Checked in	—	117	117
LOCAL TOTALS					234	234

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

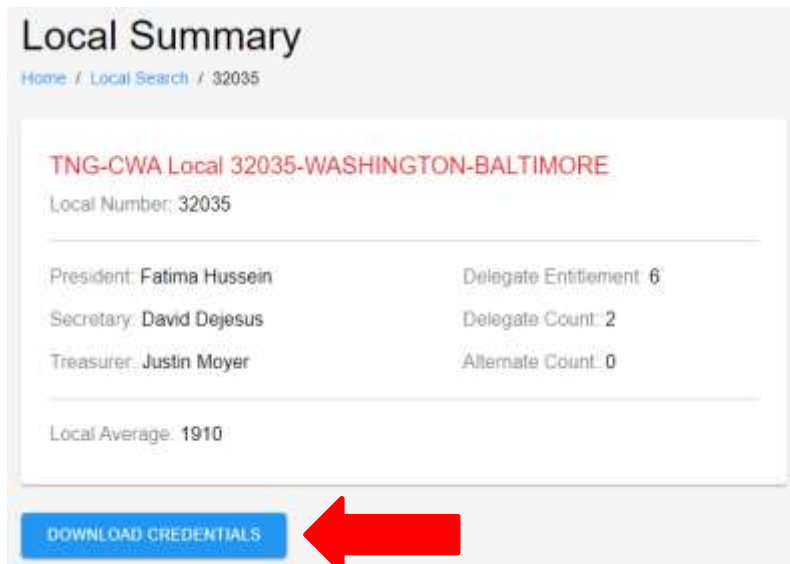


Note: You may download/save or print your Convention credentials by clicking the icons on the upper right-hand corner of the PDF document.



Download/Print Local Credentials

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



Local Summary
Home / Local Search / 32035

TNG-CWA Local 32035-WASHINGTON-BALTIMORE
Local Number: 32035

President: Fatima Hussein	Delegate Entitlement: 6
Secretary: David DeJesus	Delegate Count: 2
Treasurer: Justin Moyer	Alternate Count: 0

Local Average: 1910

DOWNLOAD CREDENTIALS

After clicking “**download credentials**,” the system will generate a PDF document in a new window with **all of the Convention 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.



Download Credentials

LOCAL_32035_CRED.pdf

June 30, 2021

CWA

CREDENTIAL TO THE 2021 CONVENTION TESTING - TAKE 5
NEW ORLEANS, LA

Communications Workers of America

We hereby certify that **Justin Moyer** was elected by secret ballot among the members in good standing, in accordance with Article VI of the CWA Constitution as a (X) - CHAIRPERSON () - DELEGATE to represent **CWA Local 32035**, located in , of the 2021 Convention Testing - Take 5 which will be held on **October 30, 2021** in **New Orleans, LA**, and has been authorized to cast the assigned share of the local's 2020 votes, subject to approval of the Credentials Committee and Convention.

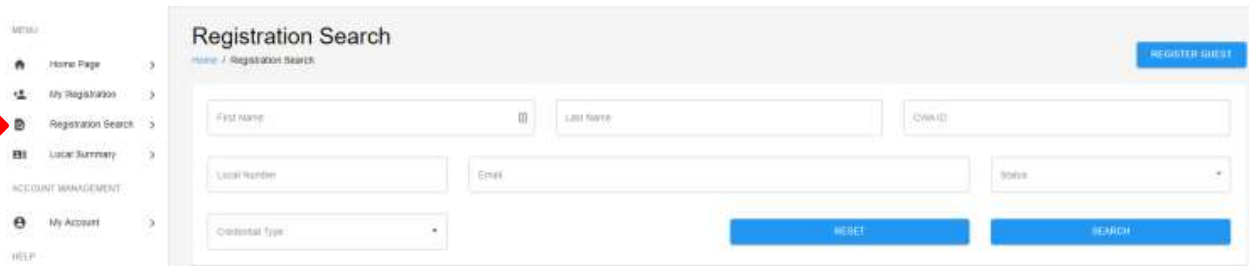
Given under our hand and seal this day on June 30, 2021.

President: Fatima Hussein
Secretary: David DeJesus

District/Section/National - Bargaining Units
Chair - TNG & Canada

Local Registration Search

As a local officer, when you log into the current Convention 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.



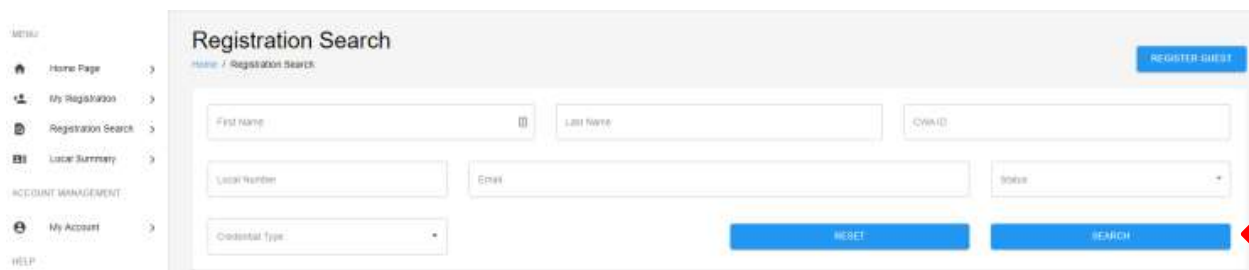
The screenshot shows the 'Registration Search' page. On the left is a navigation menu with items: Home Page, My Registration, Registration Search (highlighted with a red arrow), Local Summary, ACCOUNT MANAGEMENT, My Account, and HELP. The main content area is titled 'Registration Search' and includes a breadcrumb 'Home / Registration Search' and a 'REGISTER SHEET' button. The search form contains fields for First Name, Last Name, CWA ID, Local Number, Email, Status (a pull-down menu), and Credential Type (a pull-down menu). At the bottom of the form are 'RESET' and 'SEARCH' buttons.

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.



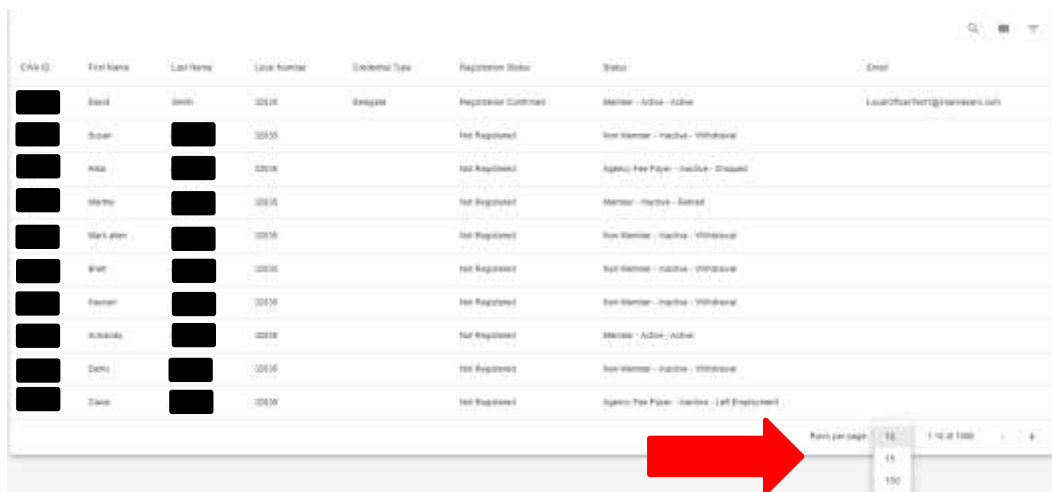
This screenshot is identical to the one above, showing the 'Registration Search' page. A red arrow points to the 'SEARCH' button at the bottom right of the search form.

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



CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
[REDACTED]	David	Joshi	00418	Delegate	Registration Confirmed	Member - Active - Active	LocalOfficeNet1@gmail.com
[REDACTED]	Sharon	[REDACTED]	00455		Not Registered	Not Member - inactive - Withdrawal	
[REDACTED]	Anita	[REDACTED]	00008		Not Registered	Agreed Fee Payer - inactive - Closed	
[REDACTED]	Melissa	[REDACTED]	00005		Not Registered	Member - inactive - Retired	
[REDACTED]	Mark Allen	[REDACTED]	00006		Not Registered	Not Member - inactive - Withdrawal	
[REDACTED]	Walt	[REDACTED]	00005		Not Registered	Not Member - inactive - Withdrawal	
[REDACTED]	Flavien	[REDACTED]	00458		Not Registered	Not Member - inactive - Withdrawal	
[REDACTED]	Alvinda	[REDACTED]	00008		Not Registered	Member - Active - Active	
[REDACTED]	Dani	[REDACTED]	00006		Not Registered	Not Member - inactive - Withdrawal	
[REDACTED]	David	[REDACTED]	00009		Not Registered	Agreed Fee Payer - inactive - Left Employment	

Rows per page: 10, 15, 100. 1-10 of 1000

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:



CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status ↑	Email
████	████	Ching	32035		Not Registered	Agency Fee Payer - Active - Active	
████	████	Mel	32035		Not Registered	Agency Fee Payer - Active - Active	
████	████	Kim	32035		Not Registered	Agency Fee Payer - Inactive - Deceased	
████	████	Abdullah	32035		Not Registered	Agency Fee Payer - Inactive - Dropped	

Results sorted by last name:

CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status ↑	Status	Email
████	████	Abdullah	32035		Not Registered	Non Member - Inactive - Withdrawal	
████	████	Abdullah	32035		Not Registered	Agency Fee Payer - Inactive - Dropped	
████	████	Abebe	32035		Not Registered	Member - Inactive - Retired	
████	████	Abel	32035		Not Registered	Non Member - Inactive - Withdrawal	

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*.



CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
--------	------------	-----------	--------------	-----------------	---------------------	--------	-------

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.

CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status
[REDACTED]	Justin	[REDACTED]	32939	Delegate	Registration Confirmed	Member - Active - Active
[REDACTED]	David	[REDACTED]	32936	Delegate	Registration Confirmed	Member - Active - Active
[REDACTED]	Susan	[REDACTED]	32936		Not Registered	Non-Member - Inactive - Withdrawn
[REDACTED]	Hila	[REDACTED]	32936		Not Registered	Agency Fee Payer - Inactive - Dropped
[REDACTED]	Martina	[REDACTED]	32936		Not Registered	Member - Inactive - Retired



Show Columns

- ☒ CWA ID
- ☒ First Name
- ☒ Last Name
- ☒ Local Number
- ☒ Credential Type
- ☒ Registration Status
- ☒ Status
- ☒ Email

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.

CWA ID	First Name	Last Name	Credential Type	Registration Status	Status
[REDACTED]	Justin	[REDACTED]	Delegate	Registration Confirmed	Member - Active - Active
[REDACTED]	David	[REDACTED]	Delegate	Registration Confirmed	Member - Active - Active
[REDACTED]	Susan	[REDACTED]		Not Registered	Non-Member - Inactive - Withdrawn
[REDACTED]	Hila	[REDACTED]		Not Registered	Agency Fee Payer - Inactive - Dropped
[REDACTED]	Martina	[REDACTED]		Not Registered	Member - Inactive - Retired

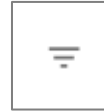


Show Columns

- ☒ CWA ID
- ☒ First Name
- ☒ Last Name
- ☐ Local Number
- ☒ Credential Type
- ☒ Registration Status
- ☒ Status
- ☐ Email

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*.



CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
--------	------------	-----------	--------------	-----------------	---------------------	--------	-------

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

The screenshot shows a filter window with a title bar containing 'FILTERS' and 'RESET' (highlighted by a red arrow), and a close button 'X'. The window contains eight text input fields arranged in a 4x2 grid:

CWA ID	First Name
Last Name	Local Number
Credential Type	Registration Status
Status	Email

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:

CWA ID	First Name	Last Name	Local Number	Ch
	Clarissa		32035	
	Meng		32035	
	Barang		32035	
	Mike		32035	
	Joan		32035	
	David		32035	

FILTERS RESET

CWA ID

First Name

Last Name

Local Number

Credential Type

Registration Status

Status

Email

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':

Save

CWA ID	First Name	Last Name	Local Number	Credential Type
	David		32035	
	David		32035	Delegate
	David		32035	
	David		32035	
	David		32035	

CWA ID

First Name David

Last Name

Local Number

Credential Type

Registration Status

Status

Email

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.

FILTERS RESET

CWA ID

First Name david

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 Convention – 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 Convention.

Registration Search

Home / Registration Search

REGISTER GUEST

First Name: [] Last Name: [] CWA ID: []

Local Number: [] Email: [] Status: **Active** ▼

Credential Type: []

RESET SEARCH

CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
[REDACTED]	David	[REDACTED]	32936	Delegate	Registered/Confirmed	Member - Active - Active	LocalOfficerTerm@charitables.com
[REDACTED]	Edna	[REDACTED]	32936		Not Registered	Member - Active - Active	
[REDACTED]	Kim	[REDACTED]	32936		Not Registered	Member - Active - Active	kim-yv@charitables.com
[REDACTED]	Adie	[REDACTED]	32936		Not Registered	Member - Active - Active	
[REDACTED]	Armand	[REDACTED]	32936		Not Registered	Member - Active - Active	
[REDACTED]	Joel	[REDACTED]	32936		Not Registered	Member - Active - Active	joelach@char.com

Clear Search Fields

If you made a mistake or would like to clear all search fields to search for something else, click “**reset**.”

Registration Search

Home / Registration Search

REGISTER GUEST

First Name: [] Last Name: [] CWA ID: []

Local Number: [] Email: [] Status: []

Credential Type: []

RESET SEARCH

Menu:

- Home Page
- My Registration
- Registration Search
- Local Summary
- ACCOUNT MANAGEMENT
- My Account
- HELP

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.

The screenshot shows the 'Registration Search' form. A red arrow points to the 'First Name' field containing 'andrew'. Another red arrow points to the 'Last Name' field containing 'Smith'. A third red arrow points to the 'Status' dropdown menu, which is set to 'Active'. A fourth red arrow points to the 'SEARCH' button. The form also includes fields for 'Local Number', 'Email', 'CWA ID', and 'Credential Type', along with a 'RESET' button.

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

The screenshot shows the search results table. A red arrow points to the first row of the table. The table has columns for CWA ID, First Name, Last Name, Local Number, Credential Type, Registration Status, Status, and Email. The first row shows a result for Andrew Smith, who is a non-member.

CWA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
[REDACTED]	andrew	Smith	32538		Not Registered	Non Member - Active - Active	

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 CWA Convention.*

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 Convention.


Choose the row for Andrew Smith, and click it with your mouse.



CNA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Clear
	Andrew	Smith	3208		Not Registered	Not Member - Active - Active	

Rows per page: 10 1 of 1

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



First Name* Andrew Address Name Last Name* Smith

Email Address* Privacy Policy Number* Mobile Number*

Text Message Alert

☐ Yes, I want to receive convention updates and other union-related news from CNA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type


Credential Type*

Badge Information

Badge Nickname* Badge Country* United States* Badge State/Region* Badge City*

REGISTER

Enter the rest of the information in the registration page, choose the appropriate credential type, and click “register” to complete the process.




First Name* Andrew Address Name Last Name* Smith

Email Address* andrew@test.com Privacy Policy Number* (555) 555-5555 Mobile Number* (555) 555-5555

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CNA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).


Credential Type

Credential Type* Alternate* Choose Credential: 

Badge Information

Badge Nickname* Andy Badge Country* United States* Badge State/Region* DC* Badge City* Washington

REGISTER



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.



CRA ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
████	Andrew	Smith	32028	Alternate	Registration Confirmed	Non Member - Active - Active	andrew@test.com

As mentioned above, since Andrew Smith's status is non-member-active-active, when you look at his registration details – you will notice the Convention 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 Convention, so Andrew Smith will be allowed to check-in and receive a badge.

Personal Details

Name: Andrew Smith
 Email: andrew@test.com
 Primary Phone: (555) 555-5555
 Mobile Phone: (555) 555-5555

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#)

Credential Type

Type: Alternate
 Are you the Chairperson: No
 Alternate: N/A
 Bargaining Units: N/A

Registration Details

Registration Status: **Registered**

Badge Information

Badge #: 260069
 Nickname: Andy
 Country: United States
 State/Region: DC
 City: Washington
 Type: Alternate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
MemberNotActive	Unresolved	July 10, 2021, 12:38 AM	

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.

Registration Search

[Home](#) / [Registration Search](#)

[REGISTER GUEST](#)

Status
Active

Credential Type

RESET

SEARCH

Check ID	First Name	Last Name	Local Number	Credential Type	Registration Status	Status	Email
	David		32916	Delegate	Not Registered	Member - Active - Active	
	John		32936		Not Registered	Member - Active - Active	
	Ken		32936		Not Registered	Member - Active - Active	
	John		32936		Not Registered	Member - Active - Active	
	Armando		32936		Not Registered	Member - Active - Active	
	Joel		32936		Not Registered	Member - Active - Active	

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.

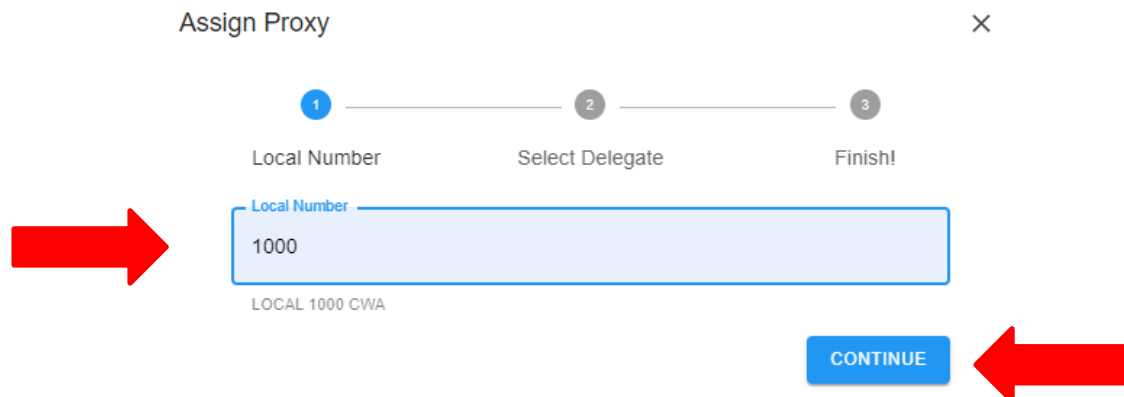
Assign a Proxy

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



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

Note: Only delegates who have registered 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

SUBMIT



Note: Only delegates who have registered for Convention will display in the drop down menu to select from. If the person you would like to designate is not registered, please contact the local directly, so they can make sure a delegate registers. If the local you wanted to designate is going to proxy someone to attend in their place, please choose a different local.

5. Choose a delegate from the list, and click “**submit.**”

Assign Proxy

×



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

Note: Only delegates who have registered 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

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



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 Convention registration details.

DELEGATE										
ALTERNATE										
GUEST										
DELETED										
Default sort: Chair / Last Name / First Name										
BADGE NICKNAME	CWA ID	PROXY	CHAIRPERSON	FIRST NAME	LAST NAME	BADGE CITY	BADGE STATE	TOTAL VOTES	INDIVIDUAL ISSUES	BADGE #
Amy Lat		51018	Yes	Amy	Lafferty	Levington	RI	500	0	200007



*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**."*

Assign Proxy



1

2

3

Local Number

Select Delegate

Finish!

Local Number

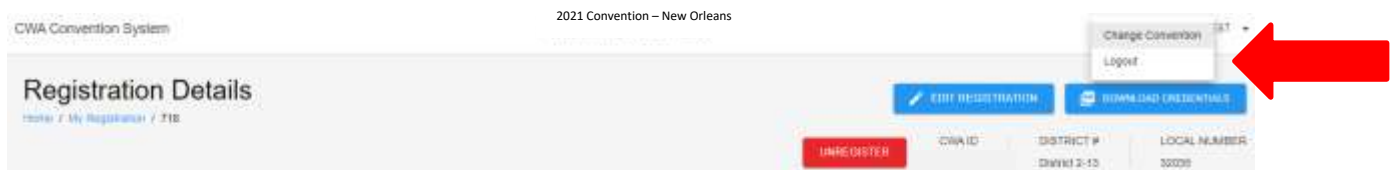
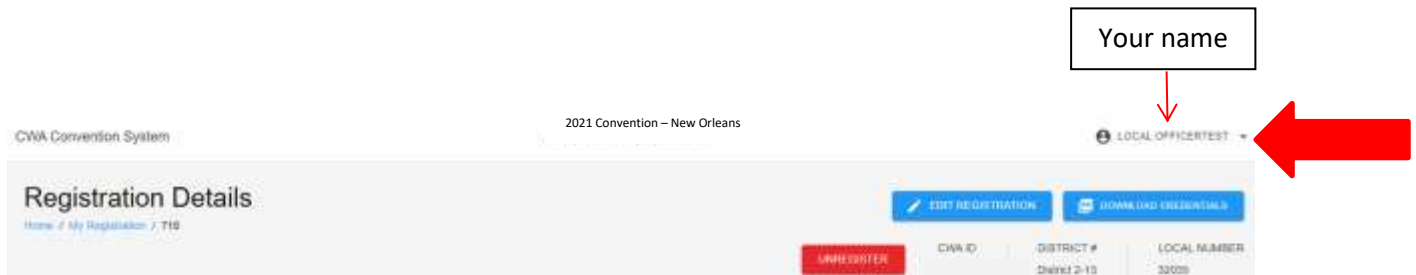
51018

Local not eligible

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> 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.



Registration Details

Home / My Registration / 718

[EDIT REGISTRATION](#)[DOWNLOAD CREDENTIALS](#)

[UNREGISTER](#)

CWU
0911

12345

DISTRICT #
District 2-13

LOCAL NUMBER
32035

Personal Details

Name: David Smith

Email: LocalOfficerTest1@sharklazers.com

Primary Phone: (202) 123-4567

Mobile Phone: (202) 568-7989

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type: Delegate

Are you the Chairperson: No

Alternate: N/A

Bargaining Units: D—TNG & Canada

Local Bargaining Units

DATA FIELD	VALUE	DESIGNATION
Vote Share	1800	Delegate

Registration Details

Registration Status: Registered

Badge Information

Badge #: 780019

Nickname: Dave

Country: United States

State/Region: DC

City: Washington

Type: Delegate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found			

- 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.

CWA Convention System Convention Testing 2021 - Take 3 LOCAL OFFICERTEST

First Name*

Middle Name

Last Name*

Email Address*

Primary Phone Number*

Mobile Number*

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Credential Type*

Are you the Chairperson?

*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

TNC & Canada ☐ Chairperson ☒ Delegate ☐ Neither


Badge Information

Badge Name*

Badge Country*

Badge State/Region*

Badge City*




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.

Registration Details

Home / My Registration / 718

[EDIT REGISTRATION](#)[DOWNLOAD CREDENTIALS](#)

[UNREGISTER](#)

CWA ID: 12345DISTRICT #: District 2-13LOCAL NUMBER: 32035

Personal Details

Name: David Smith

Email: LocalOfficerTest1@shankasers.com

Primary Phone: (202) 123-4567

Mobile Phone: (202) 568-7989

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.

Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type: Delegate

Are you the Chairperson: No

Alternate: N/A

Bargaining Units: D—TNG & Canada

Local Bargaining Units

DATA FIELD	VALUE	DESIGNATION
Vote Share	1800	Delegate

Registration Details

Registration Status: Registered

Badge Information

Badge #: 750019

Nickname: Dave

Country: United States

State/Region: DC

City: Washington

Type: Delegate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found			

- The system will ask you 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.

Unregister

×

Are you sure you wish to unregister this attendee?

CANCEL

CONFIRM

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 Details

Home / My Registration / 718

Deleted records cannot be edited

UNDO DELETE

Download Credentials

CWA ID

DISTRICT #

LOCAL NUMBER

12345

District 2-13

32038

Personal Details

Name: David Smith

Email: LocalOfficerTest1@shankiasers.com

Primary Phone: (202) 123-4567

Mobile Phone: (202) 568-7989

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.

Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type: Delegate

Are you the Chairperson: No

Alternate: N/A

Bargaining Units: D—TNG & Canada

Local Bargaining Units

DATA FIELD	VALUE	DESIGNATION
------------	-------	-------------

Registration Details

Registration Status: **Unregistered**

Badge Information

Badge #: 700019

Nickname: Dave

Country: United States

State/Region: DC

City: Washington

Type: Delegate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found.			

Page 67 of 72

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: *Convention Testing 2021 - Take 3*

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

Registration Details

Home / My Registration / 718

Deleted records cannot be edited **UNDO DELETE**

CWA ID	DISTRICT	LOCAL NUMBER
12345	District 2-13	32035

Personal Details

Name: David Smith

Email: LocalOfficerTest1@shankiasers.com

Primary Phone: (202) 123-4567

Mobile Phone: (202) 568-7989

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type: Delegate

Are you the Chairperson: No

Alternate: N/A

Bargaining Units: D—TNG & Canada

Local Bargaining Units

DATA FIELD	VALUE	DESIGNATION
------------	-------	-------------

Registration Details

Registration Status: **Unregistered**

Badge Information

Badge #: 790019

Nickname: Dave

Country: United States

State/Region: DC

City: Washington

Type: Delegate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found.			

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**.'

Personal Details

Name: David Smith
Email: LocalOfficerTest1@sharklasers.com
Primary Phone: (202) 123-4567
Mobile Phone: (202) 568-7989

Text Message Alert

☒ Yes, I want to receive convention updates and other union-related news from CWA.
Message & data rates may apply. Please review our [Terms and Conditions](#) and [Privacy Policy](#).

Credential Type

Type: Delegate
Are you the Chairperson: No
Alternate: N/A
Bargaining Units: D—TNG & Canada

Registration Details

Registration Status: **Registered**



Badge Information

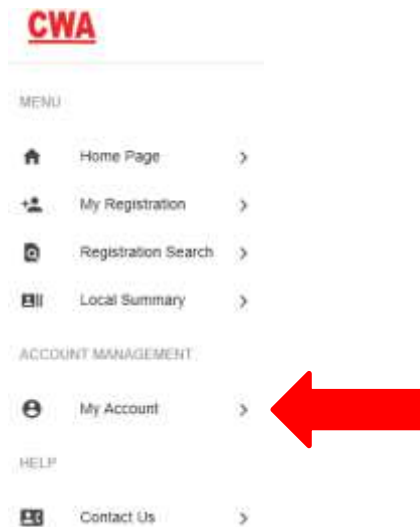
Badge #: 780019
Nickname: Dave
Country: United States
State/Region: DC
City: Washington
Type: Delegate

Registration Issues

ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
Sorry, no matching records found			

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> 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.**”

Edit Account


* Required fields

Email *	<input type="text" value="LocalOfficer@test.com"/>
First name *	<input type="text" value="David"/>
Last name *	<input type="text" value="Smith"/>

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.



The screenshot shows a web interface for changing a password. On the left, there is a sidebar menu with three items: 'Account', 'Password', and 'Authenticator'. A red arrow points to the 'Password' item. The main content area is titled 'Change Password' and includes a note 'All fields required'. Below the title, there are three input fields labeled 'Password', 'New Password', and 'Confirmation', each with a password icon on the right. At the bottom right of the form is a blue 'Save' button, which is also pointed to by a red arrow.

***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.



This screenshot shows the same 'Change Password' form as the previous one, but with a different focus. In the top right corner of the page, there are two links: 'Back to CMS System' and 'Sign Out'. A red arrow points to the 'Sign Out' link. The sidebar menu and the main form fields remain the same.

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>