

## **Convention Management System (CMS)**

# **Local Officer User Guide**

July 2021

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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.

This year, we are launching the new web-based Convention Management System (CMS), which will ease the registration process, and allow all attendees to create their own personal accounts and register online.

As a local officer, once 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\*\*\*

## **CWAID**

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.

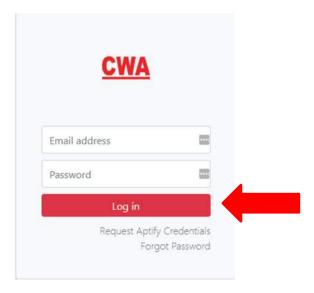
After you set up a CMS user account, and you log into the system, you will be prompted to "enter your CWA ID." By linking your CWA ID, the CMS will identify you as a Local Officer and grant you the appropriate permission level.

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.

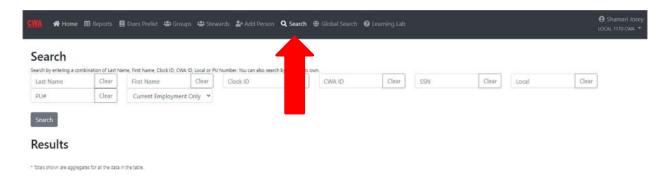
# **Look up CWA ID in Aptify**

1. Log into Aptify - <u>portal-cwa.aptify.com</u>. Enter your email address and password and click "**log in**."

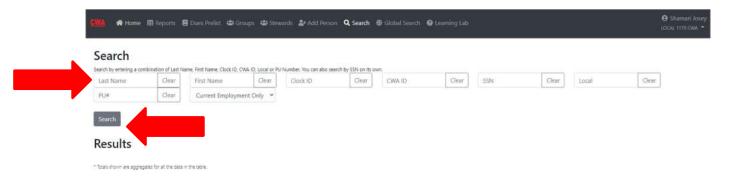


**Note**: If you need to request an Aptify account, please fill out the New Aptify Account Request form - <a href="https://cwaunion.wufoo.com/forms/z1af0ysc0kmo7lj/">https://cwaunion.wufoo.com/forms/z1af0ysc0kmo7lj/</a>

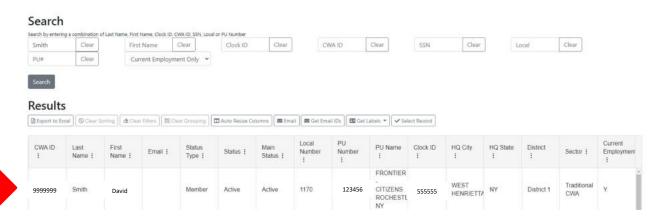
2. Click on "search" located at the top in the tool bar.



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."



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.

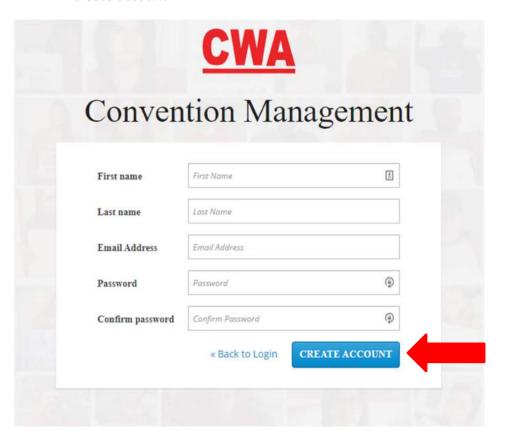


## Create a New CMS User Account

1. To create a new Convention management system (CMS) user account, click on this link or type it in your browser: <a href="https://cms.cwa-union.org">https://cms.cwa-union.org</a>. Then click "create account."

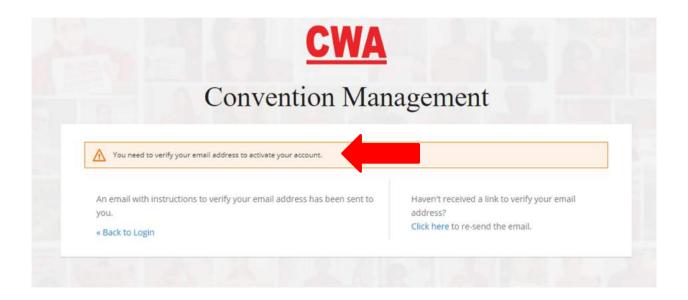


- 2. Fill out your:
  - First name / Last name
  - Email address
  - Create a password / Confirm your password
  - Click "create account"



## 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.

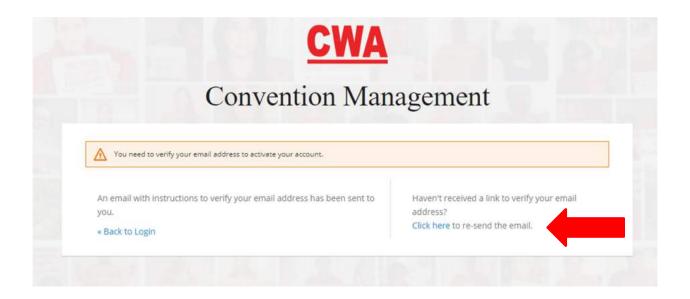


This link will expire within 1 day.

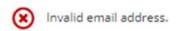
If you didn't create this account, just ignore this message.

*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.



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 <u>CWACredentials@cwa-union.org</u>.

## Forgot your password

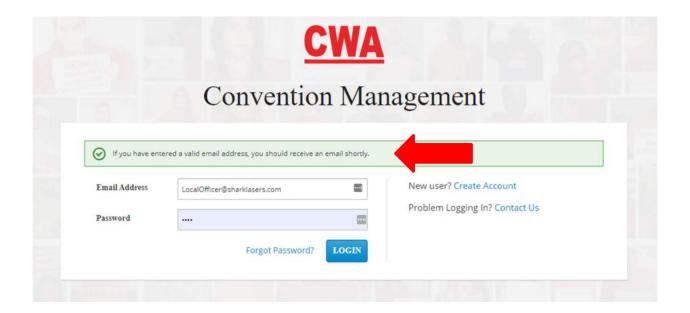
1. If you forgot your password and you need to reset your password, go to <a href="https://cms.cwa-union.org">https://cms.cwa-union.org</a> and click "forgot password?"



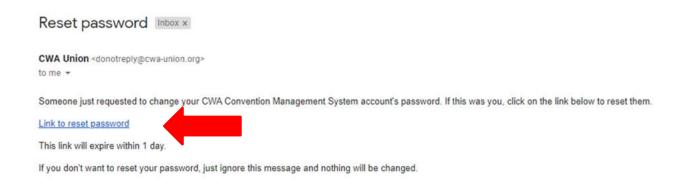
2. You will be redirected to the screen below, where you can enter your email address and click "get new password."



If you entered a valid email address, you should receive an email shortly.

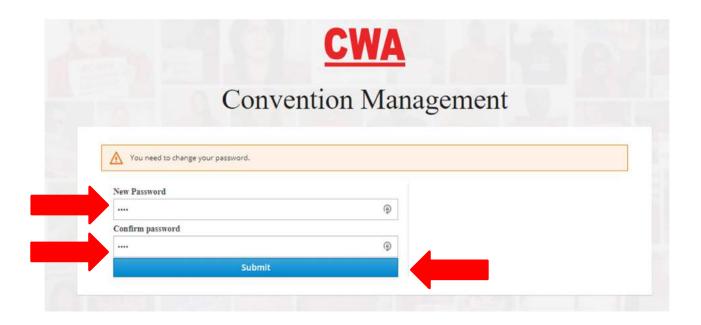


3. Check your email inbox, you should receive an email to reset your password, please click "link to reset your password."



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

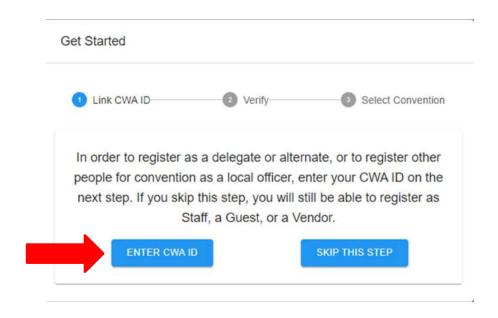


**Note**: After you click "**submit**," the CMS will automatically log you into the system.

## **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.

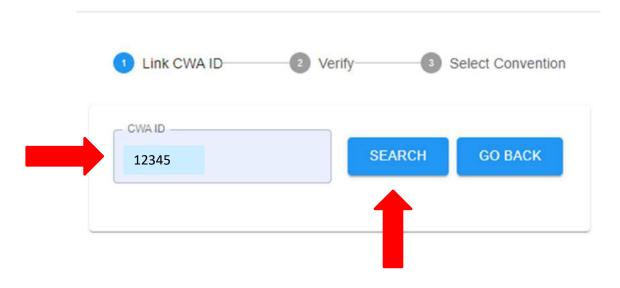
If you would like to register as a delegate or alternate for your local, or you need to assign a proxy, click "enter CWA ID" and enter your Aptify ID.



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.

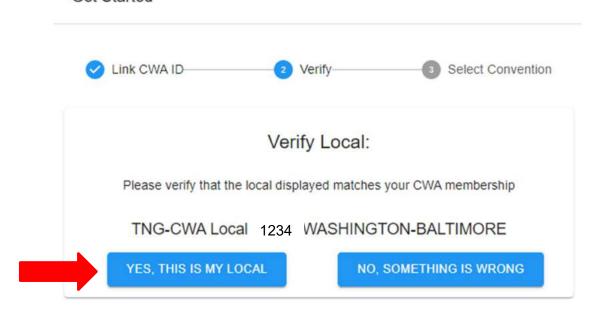
2. After you enter your CWA (Aptify) ID in the CWA ID field, click "search."

#### Get Started



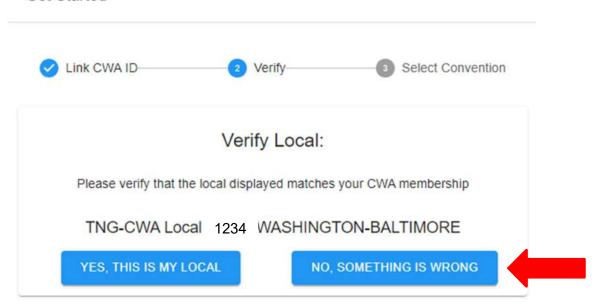
3. Then verify the local displayed matches your CWA membership. If the information matches, please click on "yes, this is my local."

#### Get Started

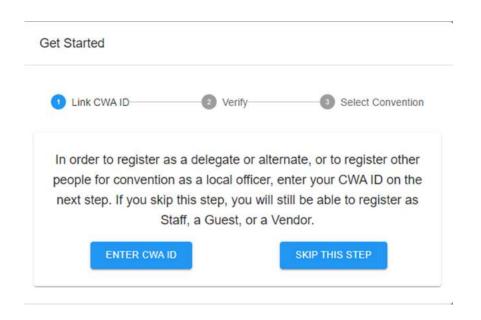


**Note**: If the local name/number displayed does not match your local, please click "no, something is wrong" to re-enter your CWA (Aptify) ID.

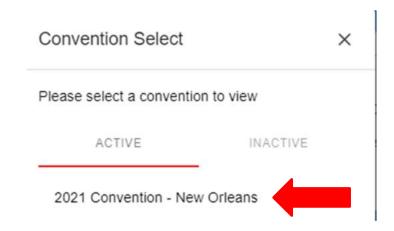
#### Get Started



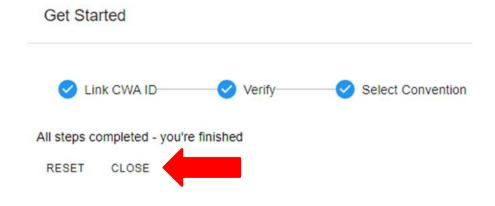
When you click "no, something is wrong," the CMS will re-route you to the previous screen where you can click "enter CWA ID" to re-enter your CWA (Aptify) ID.



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 2021 Convention – New Orleans.



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."



Note: If you would like to re-enter your CWA ID (Aptify ID), please click "reset."

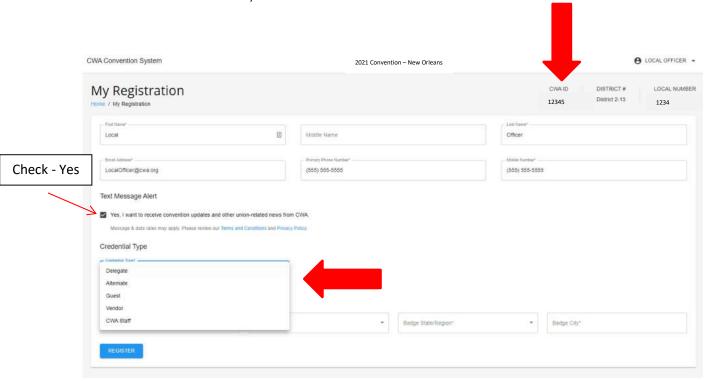
## **Register for the CWA Convention**

If you followed the instructions above and linked your CWA ID your basic information should prepopulate 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:
  - o **Delegate** Local Convention delegate
  - o Alternate Local Convention delegate
  - o **Guest** Convention guest
  - o Vendor Convention exhibit vendor
  - o **CWA Staff** Headquarters, district, local personnel staffing the Convention
- 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 Convention registration details.



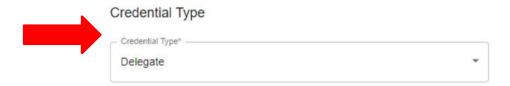
## Text Message Alert

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 the local chairperson?

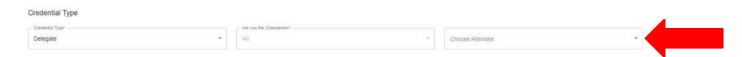
4. When registering as a *delegate* you will notice a new field will pop up where you can specify if you are the chairperson for your local, the system defaults to 'no.' If you are the chairperson for your local, click the down arrow in the 'are you the local chairperson?' field and choose "yes."



*Note*: Every local needs to select 1 chairperson so the vote counts are allocated correctly.

#### 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.

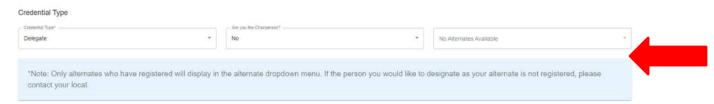


Anyone who has registered as an alternate in your local will show up in the pull down menu, and you can choose one person.

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



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



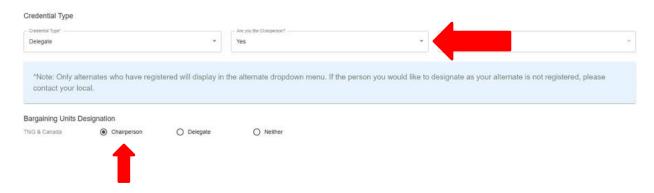
### **Bargaining Units Designation**

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.



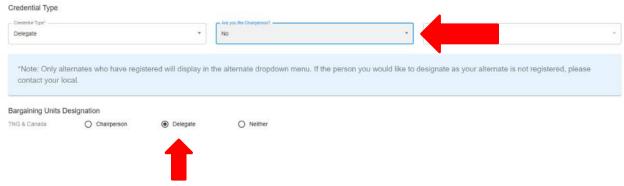
#### Yes, I am a chairperson

If you choose "yes" because you are your local's chairperson, you will notice the bargaining units designation will automatically default to 'chairperson.'



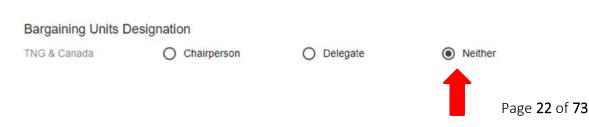
#### No, I am not a chairperson

If you choose "**no**" because you are not your local's *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 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.



For example, a delegate badge will print like this:



## **Complete Registration Process**

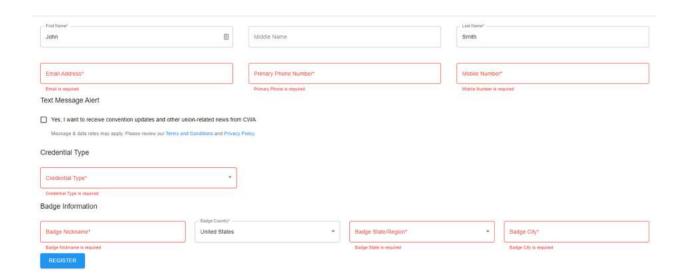
7. When you finish entering all of your personal details, please click "**register**" to save the information and complete your Convention registration.



#### **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.



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 2021

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.



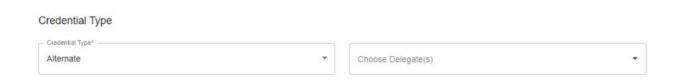
## **Credential Type**

3. Choose the credential type "alternate" from the dropdown menu.



## Choose a Delegate

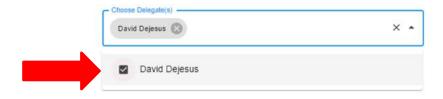
4. After you choose the credential type *alternate*, a new field called *'choose delegate(s)'* will appear.



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.



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 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.



## **Complete Registration Process**

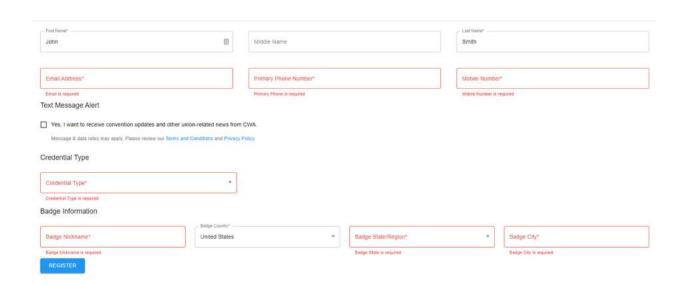
6. When you finish entering all of your personal details, please click "register" to save the information and complete your Convention registration.



#### **Notes**

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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.

## 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 2021
Attendee Name: Joe Smith - 32035
Credential Type: Alternate

Credential Type: Alternate
Registration status: Confirmed

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

Please contact us at <a href="mailto:cwa-union.org">cwa-union.org</a> 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
  - o Delegate
  - o Chairperson
  - o Alternate
  - o Bargaining units
- Local Bargaining Units
  - o Bargaining Units / Vote share / Designation
- Registration Status
- Badge Information
  - Badge # / Nickname / Country / State / City / Type
- Registration Issues
  - o Issue title / Status / Date opened / Date closed

#### \*\*\*IMPORTANT NOTE\*\*\*

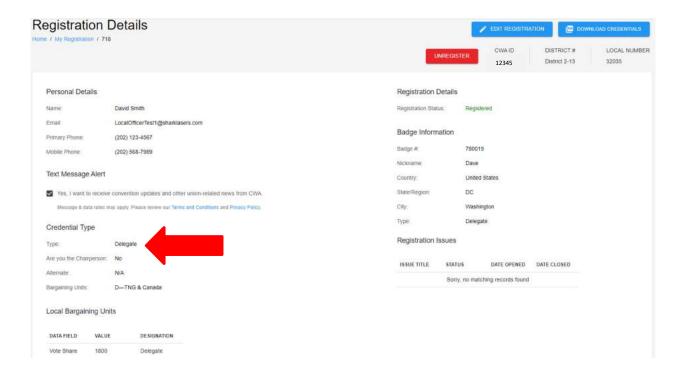
Registering on the CMS does not in itself guarantee that any individual or their local is in good standing and able to be seated at Convention or any other official meeting.

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 <u>CWACredentials@cwa-union.org</u>.

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
  - o Alternate
  - o Chairperson No
  - o Alternate − N/A
  - Bargaining units N/A
- Registration Status
- Badge Information
  - o Badge # / Nickname / Country / State / City / Type
- Registration Issues
  - o Issue title / Status / Date opened / Date closed

#### \*\*\*IMPORTANT NOTE\*\*\*

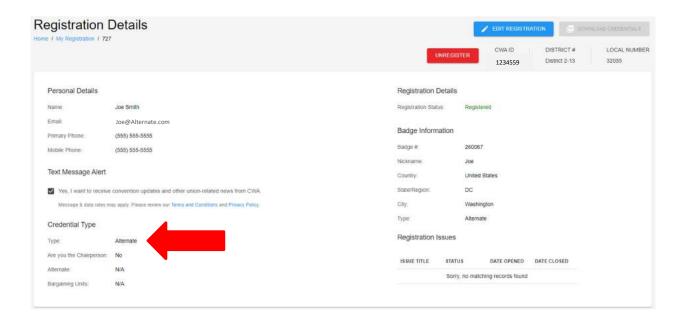
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To resolve any local and/or individual issues, please contact <u>CWACredentials@cwa-union.org.</u>

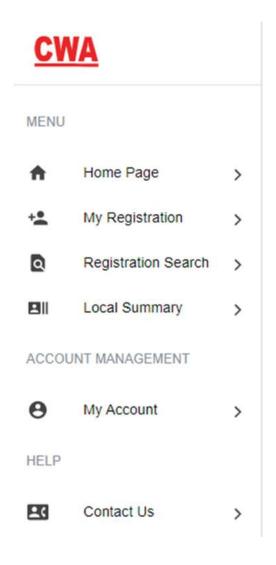
For example, an alternate's registration details would look like this:



# **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

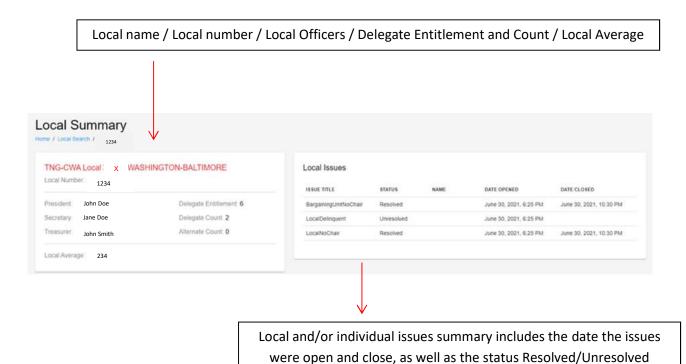
Contact information (phone and email address) for any questions or concerns related to the meeting you are attending.

## **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.

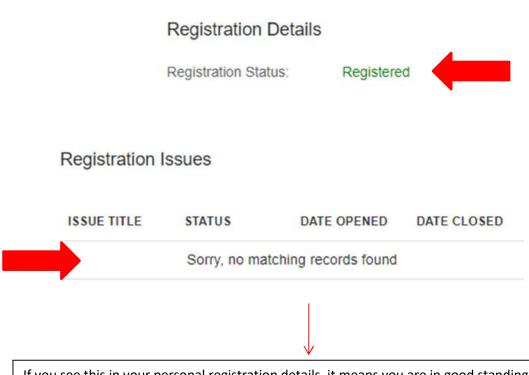


#### Registration Issues

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, please email <a href="mailto:CWACredentials@cwa-union.org">CWACredentials@cwa-union.org</a> to determine next steps.

#### No Issues - Good standing

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



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\*\*\*

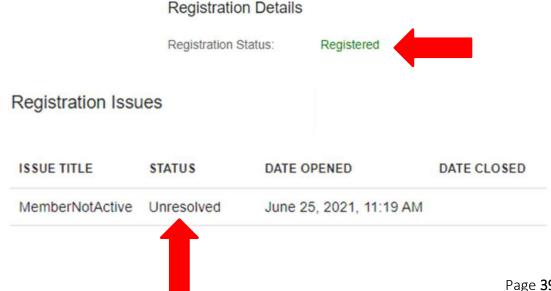
A member's individual registration issue(s) must be resolved prior to the start of the CWA Convention. The CMS <u>will allow</u> CWA members to complete the online Convention registration with the understanding that members must proactively work with the CWA Credentials Committee to <u>resolve the issue(s) prior to Convention check-in on site</u>.

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,' <u>but</u> the *Registration Issues* section will list the issue(s) that <u>must be resolved prior to the Convention</u>.

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.



### 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 <a href="mailto:CWACredentials@cwa-union.org">CWACredentials@cwa-union.org</a>, 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 <u>Resolved</u> status, and the issue was closed on 7/12/21. No further action is required.



## Registration Issues

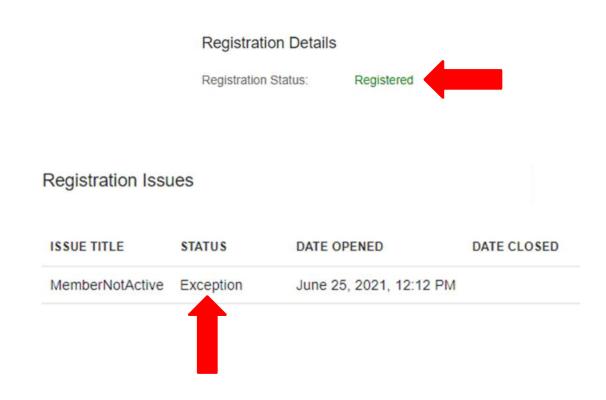
ISSUE TITLE	STATUS	DATE OPENED	DATE CLOSED
MemberNotActive	Resolved	June 25, 2021, 11:19 AM	July 12, 2021, 7:05 PM

#### **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 <a href="mailto:CWACredentials@cwa-union.org">CWACredentials@cwa-union.org</a>, 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 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 <u>will allow</u> 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 <u>resolve the issue(s) prior to Convention check-in on site</u>.

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



**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.



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



#### 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.



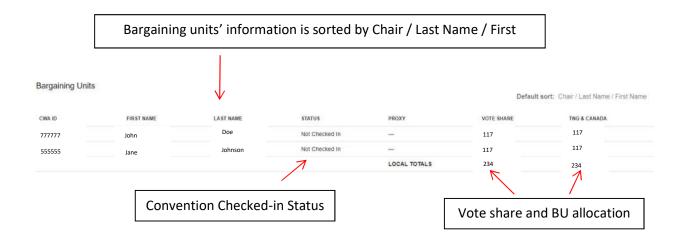
#### Deleted tab

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 Convention.

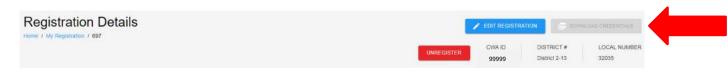


## **Download Individual Credentials**

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

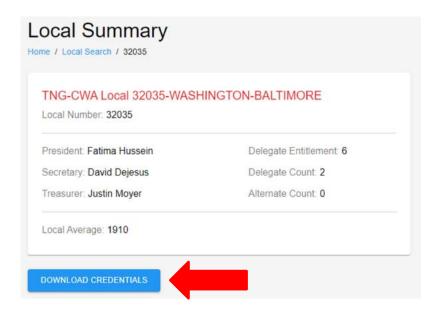


**Note**: You may download/save or print your Convention credentials by clicking the icons on the upper right-hand corner of the PDF document.



## **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."



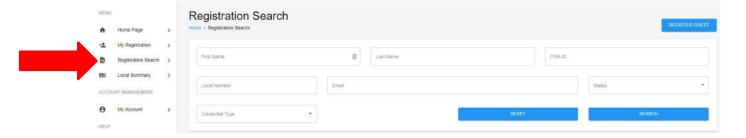
After clicking "download credentials," the system will generate a PDF document in a new window with <u>all of the Convention credentials for your local</u>. Both delegates and alternates have the ability to download/print credentilas for their local.

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 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.



### 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)
  - o Active / Inactive
- Credential type pull down menu (multiple choices)
  - o 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.

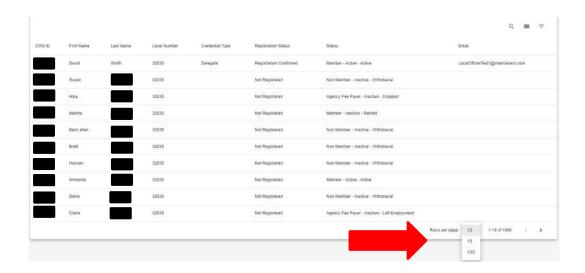


Note: You can click "reset" to clear all fields.

### 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



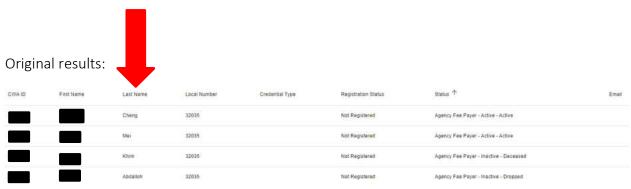
**Note**: You can click on "rows per page" and choose 10, 15 or 100 to display more records per page.

### 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."



#### Results sorted by last name:



#### 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.



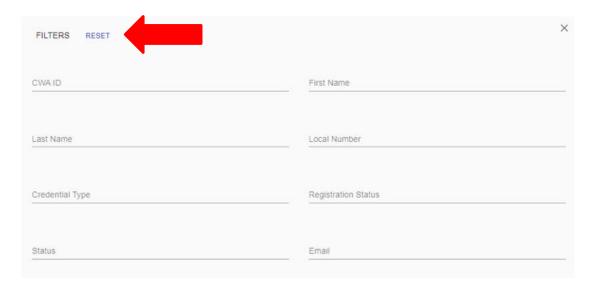
### Filter Registration Search Results

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:

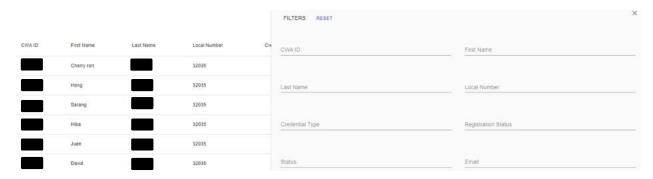
- First name
- Last name
- CWAID
- Local #
- Email address
- Member Status type Active or Inactive
- Credential type type any of the following:
  - o Delegate
  - o Alternate
  - o Guest
  - o Vendor
  - o CWA Staff
  - o Other



Note: You can click "reset" to clear all fields.

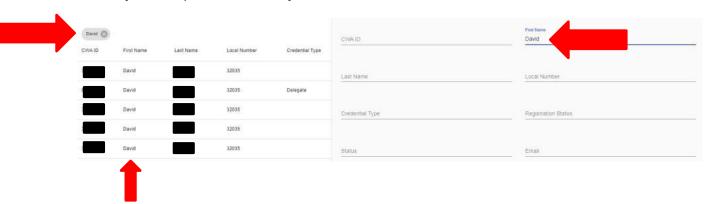
For example, you would like to filter for all the members named 'David' in your local.

#### 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

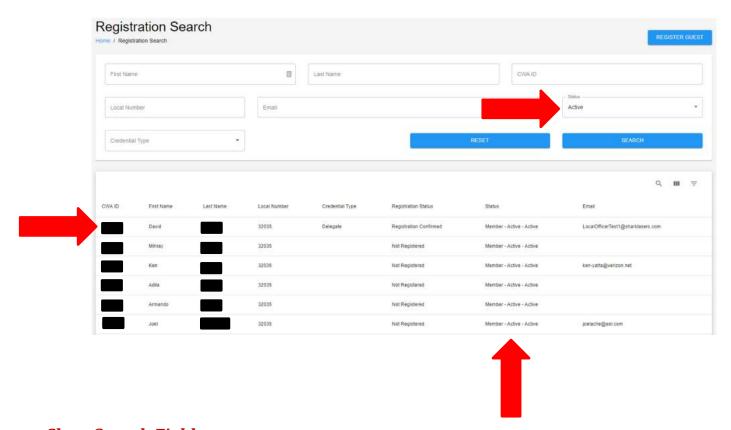
When you are done entering your filters, and you would like to get back to your *Registration Search* results, click the "X" in the upper right-hand corner to close the filter pop-up box.



**Note**: The search results with the filter criteria you entered will not clear when you close the filter pop-up box. If you want to clear the results, click "**reset**."

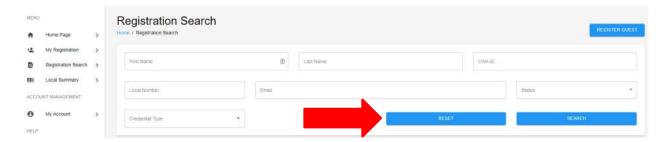
For example, if you want to search all the members in your local with an ACTIVE status, so you can see who registered for Convention – click the down arrow in the Status field, and choose **ACTIVE**, then click "**search**."

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



#### Clear Search Fields

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



## Register attendees 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.

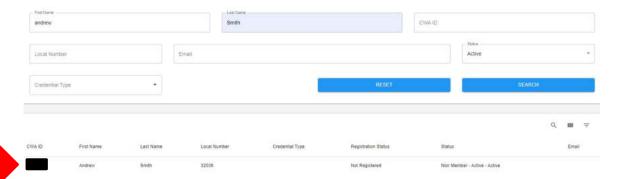
### Individual member search and registration

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.



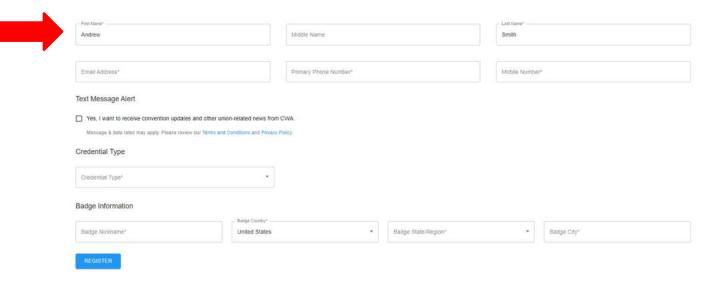
**Important Note**: In the example above, please note that the search results populated an active result, but Andrew Smith is a non-member, which would make him ineligible to participate in the CWA Convention.

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.

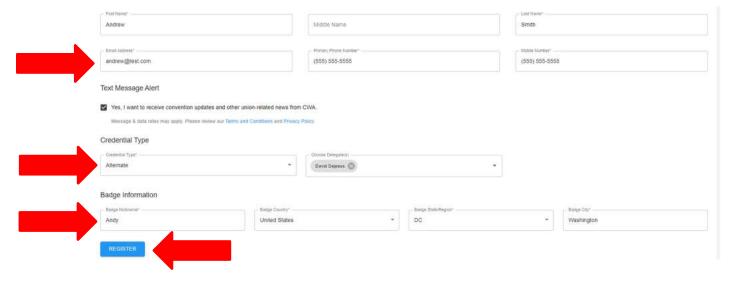
Choose the row for Andrew Smith, and click it with your mouse.



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



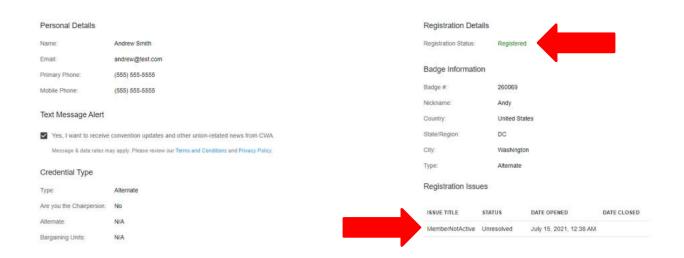
Enter the rest of the information in the registration page, choose the appropriate credential type, and click "register" to complete the process.



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.



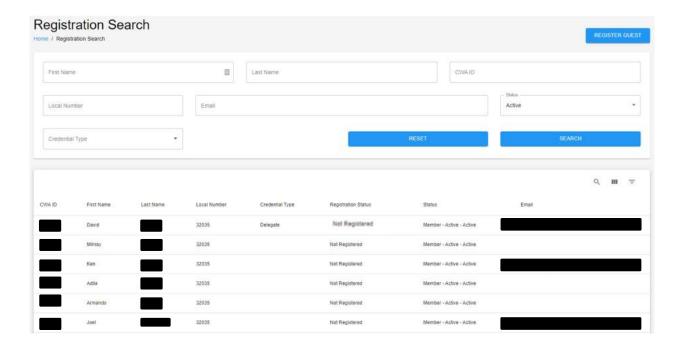
As mentioned above, since Andrew Smith's status is non-member-active-active, when you look at his registration details – you will notice the Convention registration status is 'Registered' and CMS created an individual registration issue. The individual issues needs to be resolved or the CWA Credentials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



#### Multiple member search and registration

If you want 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.

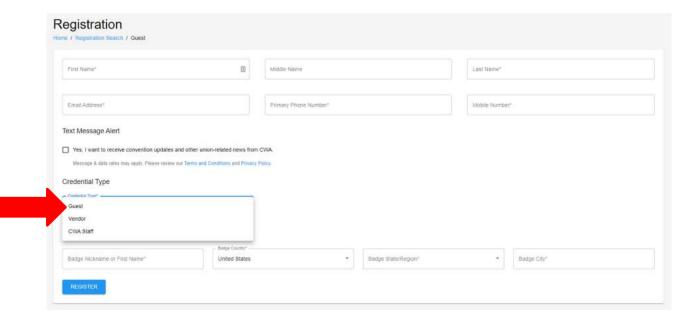
### Register a guest

1. If the local needs to register a guest, go to the *Registration Search* page, and click on 'register guest.'



**Note**: If the 'guest' you want to register is a member of the local, please follow the steps detailed in the Individual Member Search and Registration section (above). Once you click the person's name, their basic information will populate, make sure you choose the credential type 'guest.'

- 2. A new window will pop-up, please type the guest information:
  - First name
  - Last name
  - Email address where convention confirmation will be sent
  - Member Status type Active or Inactive
  - Credential type click on the down arrow and choose *Guest*



3. After you choose the 'guest' credential type, 2 other fields will appear, where you can enter an AKA/Alias, organization name or something descriptive, and the last field will auto-populate with your local number.

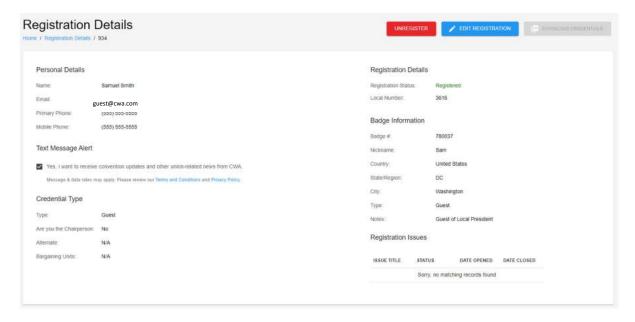
For example, if a local officer from CWA 3616 was registering a 'guest of the local president,' it would look like the screenshot below.



5. Then click "register" to complete the process.



A registration confirmation will be sent to the email address you entered in the email field, and the registration details will look like this:



## **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 <u>local composed of less than 200</u> 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.

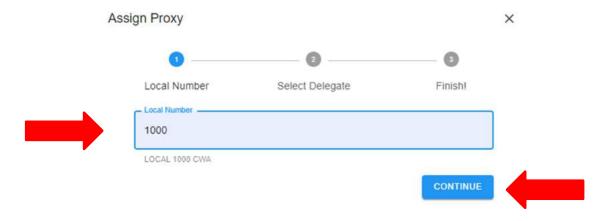
### Assign a Proxy

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

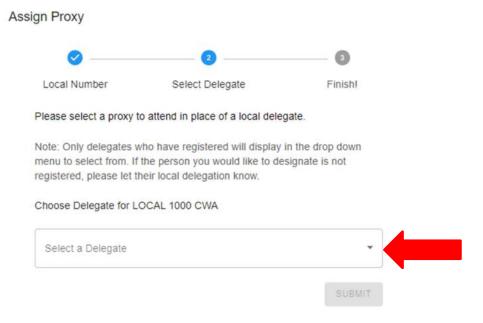
- 1. Create a CMS user account and make sure you link your CWA (Aptify) ID to your profile, so your local information will be associated appropriately. (*Follow instructions each of those sections above*)
- 2. From the *Local Summary page*, if your local is eligible, you should see an "assign proxy" 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."

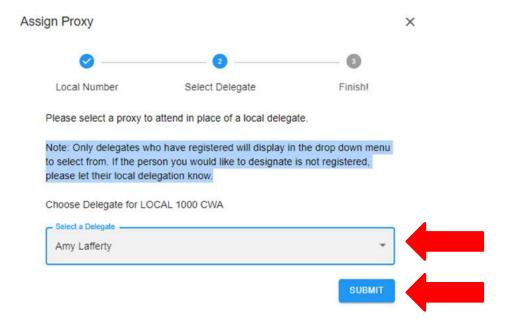


4. If the local you entered belongs to your district and/or your sector, you should see the screen below, click the down-arrow in the 'select a delegate' field.



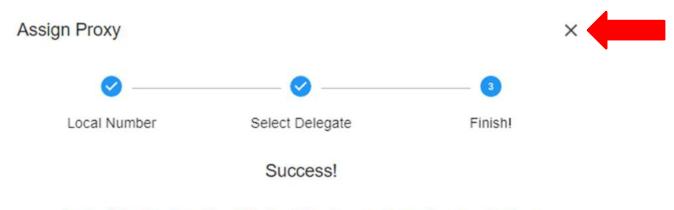
**Note**: Only delegates who have registered for Convention will display in the drop down menu to select from. If the person you would like to designate is not registered, please contact the local directly, so they can make sure a delegate registers. If the local you wanted to designate is going to proxy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

5. Choose a delegate from the list, and click "submit."



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."

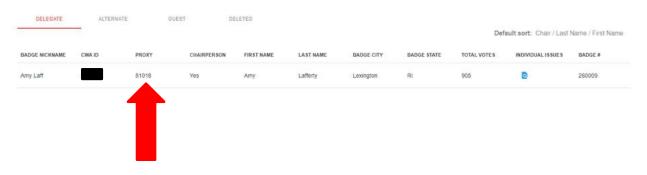
If you have any questions, concerns, or need further assistance, please email CWACredentials@CWA-union.org.



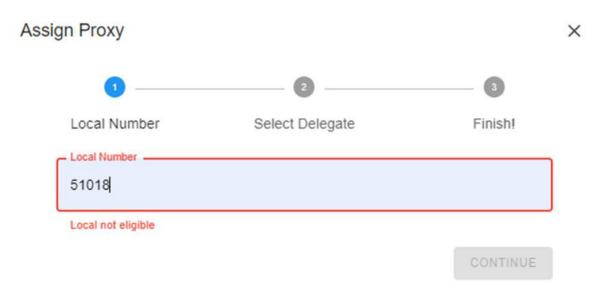
An email has been sent to notify the delegate you assigned a proxy to. If you have any questions or concerns, please contact us at <a href="mailto:CWACredentials@CWA-union.org">CWACredentials@CWA-union.org</a> for more help.

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.

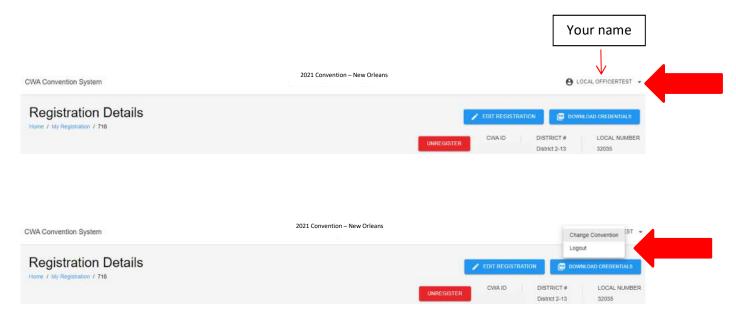


Note: If the local you entered to be your proxy <u>is not in your district and/or your sector</u>, you will see an error message that says 'Local not eligible.' Please make sure you enter a new local number that meets the proxy requirement and click "**continue**."



# **Logout of the CMS**

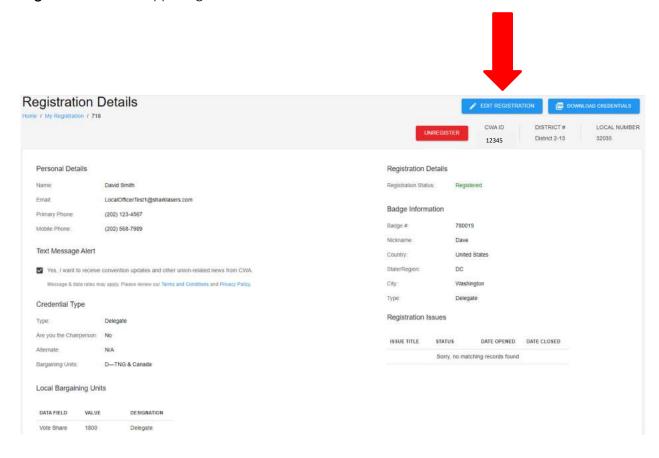
To logout of the CMS, click the down arrow in the upper right hand-corner (next to your name) and choose "logout."



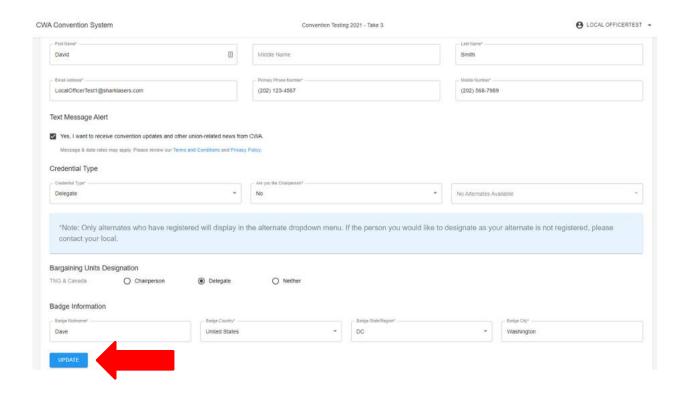
## **Registration Changes**

## **Edit registration**

- 1. If you need to make any changes to your meeting registration, click on the following link <a href="https://cms.cwa-union.org">https://cms.cwa-union.org</a> 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.

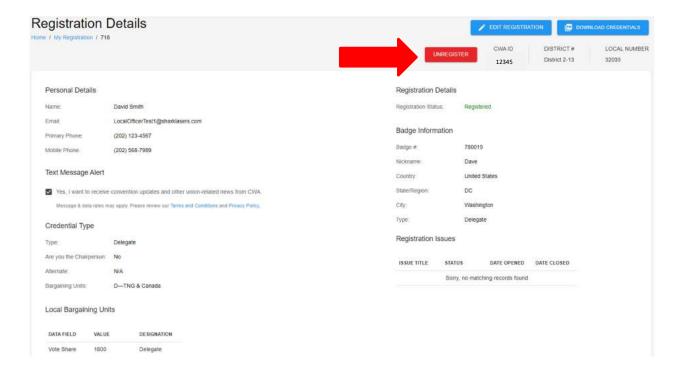


3. The system will redirect you to the registration page, where you can edit any field necessary. When you finish making changes to your registration, click "update" to save the changes.



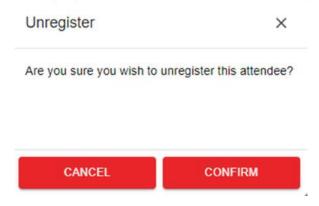
### Unregister

- 1. If you need to unregister, click on the following link <a href="https://cms.cwa-union.org">https://cms.cwa-union.org</a> and log into the CMS.
- 2. Go to the *Home* or *My Registration* page, and click "**unregister**" in the upper right-hand corner.

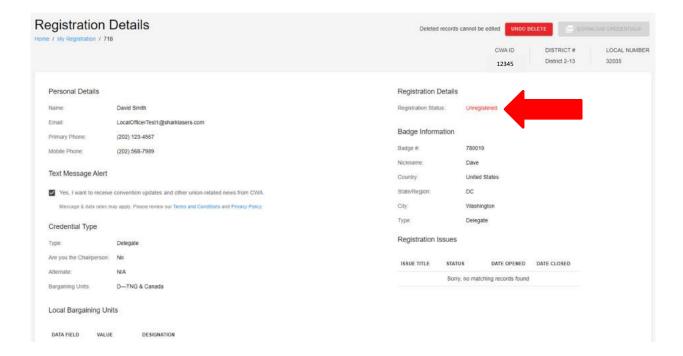


3. The system will ask you ask you "are you sure you wish to unregister this attendee?"

**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: Convention Testing 2021 - Take 3
Attendee Name: David Smith - 32035
Credential Type: Delegate
Registration status: Unregistered

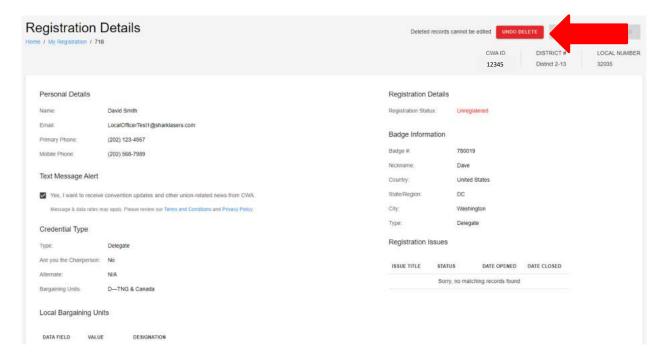
You can view your registration by logging into the convention system here.

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

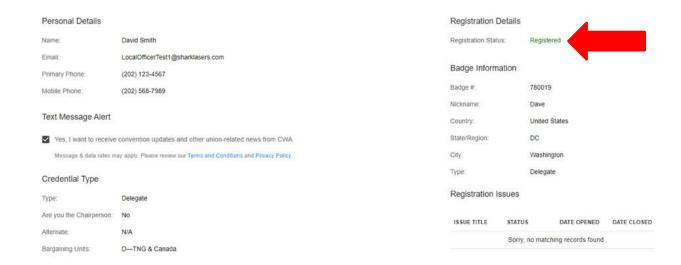
In Unity,
CWA Convention Management System

#### **Undo Delete**

- 1. If you made a mistake and you did not mean to unregister from the meeting, click on the following link <a href="https://cms.cwa-union.org">https://cms.cwa-union.org</a> and log into the CMS.
- 2. Go to the *Home* or *My Registration* page, and click "**undo delete**" in the upper right-hand corner.

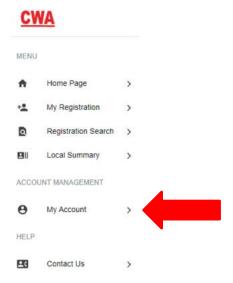


The system will navigate back to the *Registration Details* page, where you can see your registration status has changed to from 'unregistered' (see above) to 'registered.'



## **CMS User Account Changes**

- 1. If you would like to make changes to your CMS user account, please click on the following link <a href="https://cms.cwa-union.org">https://cms.cwa-union.org</a> 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 <a href="mailto:CWACredentials@cwa-union.org">CWACredentials@cwa-union.org</a>.

## **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