



CMS Connect Start-Up Guide

<http://connect.cmsdocs.org>

Chicago Medical Society (CMS) is pleased to introduce its new collaboration center, CMS Connect. This new site offers expanded opportunities for members to access CMS information and communicate with other CMS colleagues through issue-focused online communities.

1. Login with Your CMS Web site Login.

There are two ways to access CMS Connect:

- You can log in from the CMS web site, www.cmsdocs.org, using the login box in the upper right corner.
- You can go directly to <http://connect.cmsdocs.org> and click “Login to see members only content”.

Both the Login box and Login page will ask for your user name and password. Your username is your primary email address on file with CMS. A default password has been sent to you via email.

The first time you log into CMS Connect, you will need to read and agree to the Code of Conduct. After you agree, you will have complete access to the site and see Welcome with your name on the top right part of the CMS Connect home page.

2. Fill Out Your Profile.

Click on the “My Profile” tab. On your profile page, you can update and add information and upload a photo. If you have a LinkedIn account profile you would like to use, you can grab profile information from your LinkedIn account.

Click on the “Edit” buttons to update your information. Clicking on “Edit” will usually open an editable area right on the screen—you can make your updates there and click “Save.” If you have been on the site for a while, clicking “Edit” may redirect you to your profile page within the **CMS Account** area, and you may need to re-enter your login information. After making edits here, be sure to save them, and then click on the CMS Connect link to return to the community area.

The more information you enter into your profile, the more ways the system can match you with other members who have similar experiences or interests.

3. Change or Retrieve Your Password.

To change the default password that was provided to you by CMS, click on the “My Profile” tab. On your profile page, you will see a link in the middle of your profile (under your contact information) that says Change Your Password. Click on this link and you will be redirected over to the **CMS Account** area. If you are already logged in, you will land on the **My Information** page. On this page, you will see a link to change your password. Click on that link and you will be presented with the change password page. Enter your existing or default password (referred to as “old”), and then enter your new password twice. Save your changes. Then click on the CMS Connect link on the confirmation page or in the main navigation to return to the CMS Connect site.

If you ever forget your password, you can use the Forgot Password feature. You will find this link in the Login box that appears in the upper right corner of the main **CMS web site**. Click on that **Forget Password** link. You will be redirected over to the CMS Account area. Enter your primary email address on file with CMS and an email will be sent to you which contains a link to reset your password. When that email arrives, click on the link it contains, and you will be brought to a page that asks you to set a new password. (Please note, you cannot use the Forget Password feature until you have logged into the CMS Web site at least once with the default password that was provided to you by CMS).

4. Set Up Your Privacy Settings for the CMS Member Directory.

Click on “My Privacy Settings” in your profile or under the “My Profile” tab. The default is “Yes” to allow other members to contact you; it is highly recommended that you keep that setting as is.

You can forward non-discussion group messages to your email address, so if a member sends you a contact/friend request, a message, or a community invitation you will receive that message in your inbox on your computer. Otherwise, the messages sent will only go to your inbox in the CMS Connect website. You can also change your notification email address if you want these messages to go to a different email address.

The default is to be included in the member directory and community rosters; it is highly recommended that you keep that setting as is.

From there, you can adjust who sees what parts or attributes of your profile.

- **Select Nobody** if you don’t want anyone except you to see an attribute.
- **Select Public** if you want members and registered visitors to see an attribute. By default, the entire CMS Member Directory is only accessible to individuals who have logged into the community area.
- **Select Members Only** if you want only want CMS members to see an attribute.
- **Select My Contacts** if you only want your contacts or friends (from contact requests) to see an attribute.

When finished, click “Save”.

Think of your profile as your professional calling card. It helps other members find you and helps them to understand your experience and areas of expertise.

5. Customize Your Discussion Subscription Settings

Click on **“My Subscriptions”** under the **My Profile** area. Here you can see all the discussions you can join. You can customize how you want to receive emails in each discussion.

- **Real Time:** receive discussion emails as they are contributed;
- **Daily Digest:** receive one discussion email per day that has all contributions from the previous day.
- **Legacy:** receive discussion emails as they are contributed in plain text format—best for smart phones, and if you wish to contribute to the community via email (versus posting on the site).

You can also choose to receive **no emails**, which means you still have access to the community and can read any posting online; or you can choose to **unsubscribe**, which means you will not be able to view the postings online.

It is recommended that you keep the HTML default as your mail format. This format sends enhanced messages with easy links to respond to or view discussion threads. It also enables you to add attachments to your post in which the file will become part of the resources area associated with the discussion group.

To ensure delivery of discussion email messages, please add these addresses to your email address book and as safe senders:

- noreply@egroups.cmsdocs.org and
- noreply@notifications.cmsdocs.org

6. Start Networking: Make and Receive Contact Requests.

In the **“Directory”** tab, find members you know or want to know better and send them a **contact request**. You can also send a message to that member from here.

You can also go to your profile and click on **“My Networks”** on the left. This is where the system matches you with other members who have entered common attributes in their profiles. You will see a list of the attributes you have in your profile with the number of members or potential contacts with the same attributes. Click on the number and you will see a list of the members in that group. Here you can also send a contact request or message to any of those members.

Your profile page lets you know when you have messages or contact requests and has links to manage your contacts and communities. The more contacts you make, the more points you accumulate and increase your chance of being featured as one of CMS’s “Most Active Members.”

7. Post a Message, View or Search the Discussions.

Under the “**Communities**” link in the main navigation, you will see “**View Community Discussions.**” You have several options to participate in ongoing discussions. You can view **All Discussions**, **Post a Message** to discussion groups (cross post means the message will go to an additional discussion group if you select one), and easily **search the discussion archives** by keyword, author, or date.

All recent discussions show up on the CMS Connect home page, so you can always see what members are talking about even if you don't receive emails, or have missed them.

8. Search for or Post Files to the Libraries area.

Under the “**Communities**” link, you can **View Libraries**, where you can view **All Resources**; easily **Search Library** for files throughout the Libraries area by keyword, author or date; and **Add a New Entry** to the libraries.

Click on a resource area name to view its contents. The default “folder view” will show the name of the folder on the left and all the files (in alphabetical order) and file types (Word, Excel, PDF, etc.) on the right. Highlight the file name you want to see and click on “View.”

You can also click on “Switch to List View” as another way to view files. “List view” has tabs where you can view most recent files, most viewed files, etc.

Each resource entry shows who posted it and when, and has the file attached (click on the name of the file to open it). There are many things you can do here:

- **Give a file a star rating**—let others know how helpful it is.
- **Add a comment**—give feedback on the file.
- **Add a related link**—have a link you can share that is related to a document in the resource area? Click on “Add Related Links” and enter the URL address in the pop-up window.
- **Add a document to your Favorites**—click on “Add to Favorites” and the those files will show up in “My Favorites” under the “Community Resources” tab so you can easily find the document when you need to without having to search for it.

You can also blog about the document, share it with a friend, and view the profile of or contact the member who added the document.

To add a document into a library area, click on “Add a New Entry” under the “View Libraries” tab, enter your document name and description, and select which resource area to add it to. Click “Save” and then browse to find the file on your computer and upload it.

CMS wants to hear from you.

Log into CMS Connect and join the conversation today!