CMTS (Case Management & Tracking System) Quick Tour Videos: Managing Teams

Speaker: Welcome to the CMTS demo.

Today, we're going to walk you through how CMTS makes managing teams both simple and effective.

Whether you're organizing small groups or large departments, CMTS provides the flexibility you need to ensure the right people have the right access at all times.

On the Manage Teams page, you can easily create a new team by clicking the ADD team button.

From here, you'll assign a team name, select a team leader, and add the team members you want to include.

This allows you to structure your teams exactly as needed to support your organization's goals.

CMTS offers three main access options for teams. With the "Anyone Can Edit", setting any authorized user, regardless of their team can edit cases assigned to the team.

Promoting collaboration across groups the "Anyone can View" option allows only team members to edit the case while others with appropriate permissions can still view it. Encouraging transparency while limiting who can make changes.

For highly sensitive cases, the team only setting restricts both viewing and editing rights to team members only providing enhanced security.

This flexibility ensures that your agency can maintain secure case management while adjusting to each team's unique needs.

Once your teams are set up, you can always go back and make adjustments.

Simply click the "Edit" button to change team members, change access, or even delete the team entirely when necessary.

With CMTS, you have the tools to keep team management both streamlined

and secure, ensuring every case is handled with the right level of access and control.

For more information or to schedule a personalized demo, please reach out at 855-636-5361 or team_cmts@securecasemanagement.com.

Thanks for choosing CMTS.