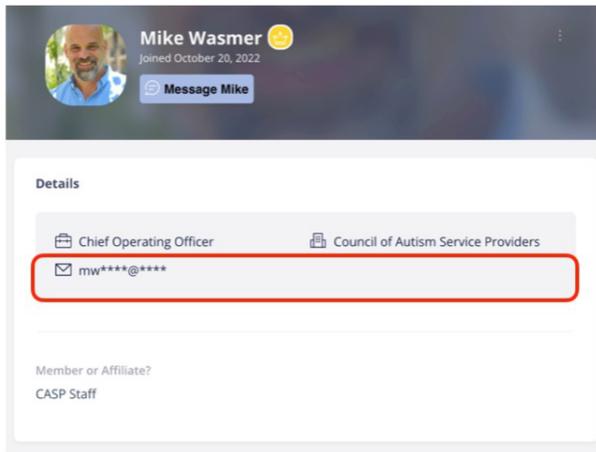


Getting started with Mobilize

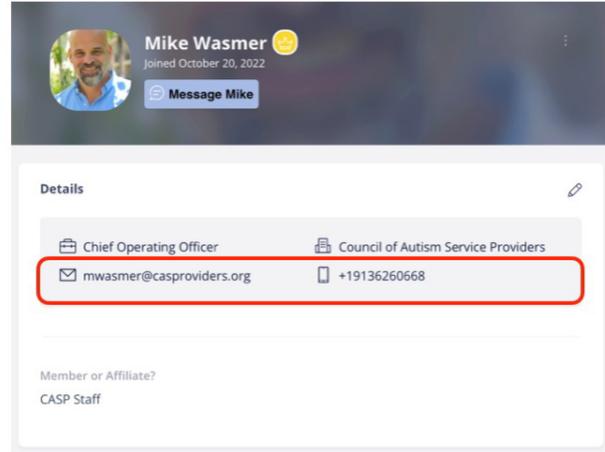
Complete your profile

- Email addresses and mobile phone numbers are only visible to CASP Staff and the primary group leader (e.g., SIG/Section leaders). Other members will not have access to this information in the member directory. (see image below)
- Mobile phone numbers may be used to occasionally send important notices via text message.

**Moderator (SIG Co-Leader)
and Member View**



**Manager
(CASP Staff and Primary SIG-Leader) View**



Site Navigation

The user interface is pretty intuitive but please see below for an overview of how to find your way around on the Mobilize platform.

Groups that you have joined →

Other groups that you can join →

Start a private chat with a group member →

Instructions and online support →

View Feed, make a post, comment

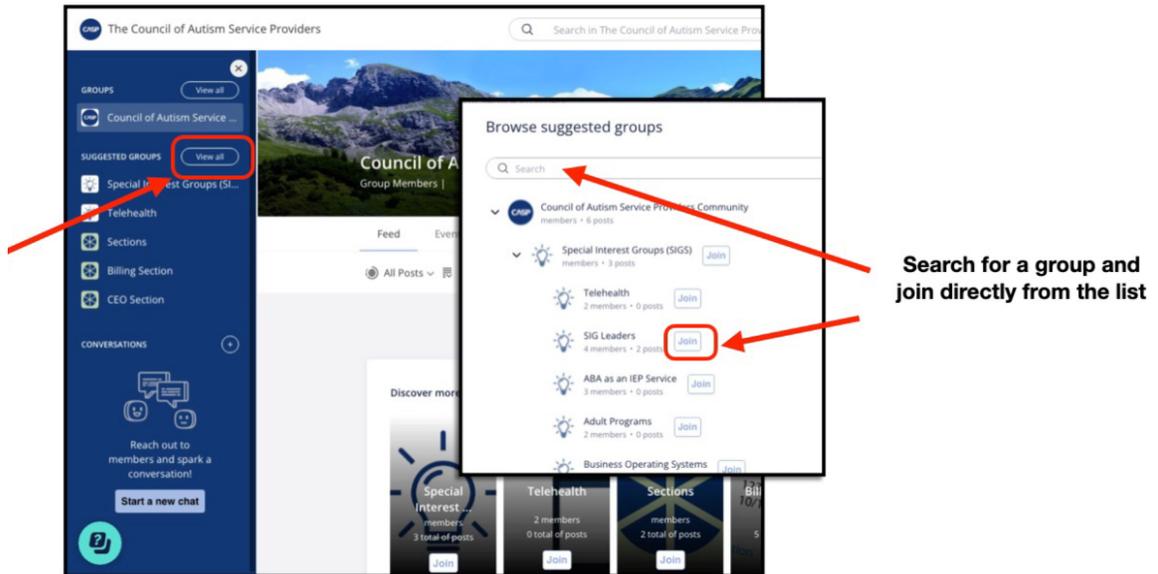
View group Events, subscribe to group calendar

Search or upload to group Resources

Getting started with Mobilize

How to find and join a group

1. Groups you are eligible to participate in will be listed under “Suggested Groups” in the left column. You may need to click the “View all” button to see the complete list. You can also search for a group by entering the name in the search bar. (see image)



2. To join a group, simply click the “Join” button next to the name of the group.
3. Joining a subgroup often requires SIG/Section leader approval. Some group leaders may request that you update your profile with additional information. For example, Business Affiliates must submit a letter of interest for consideration by the SIG leaders. *Statements of interest are optional for CASP Members.*
4. Once your request to join has been submitted, the group’s name will appear under “Pending Group Requests” in the left column of the page.

Making a post

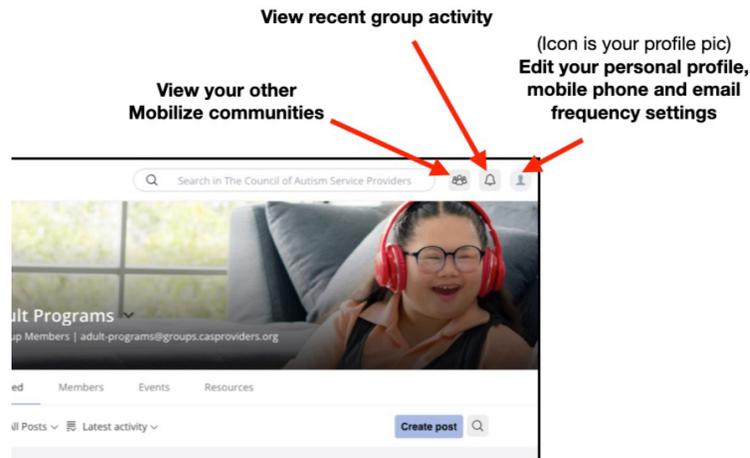
1. All group participants can make (and reply to) a post and create and respond to a group poll on the web app (desktop or mobile)
2. Similar to groups.io, posts and replies can also be made via email. However, there is more functionality in the app versus email.
 - To post via email, mail to [group-name]@groups.casproviders.org
 - Options to reply to a post via email
 - Click the “Join Conversation” to open the app to reply
 - “Reply all” - posts a public response to the group feed
 - “Reply” - posts a private response to the person who made the post

Getting started with Mobilize

3. For your convenience, the Mobilize web app is directly linked to the CASP website via single sign-on (SSO). If you are signed into the CASP website you can access the app via the menu bar: Community > SIGs and Sections > Start collaborating. You may also want to bookmark the CASP Community site, but you will need to be logged into the CASP website to access it.

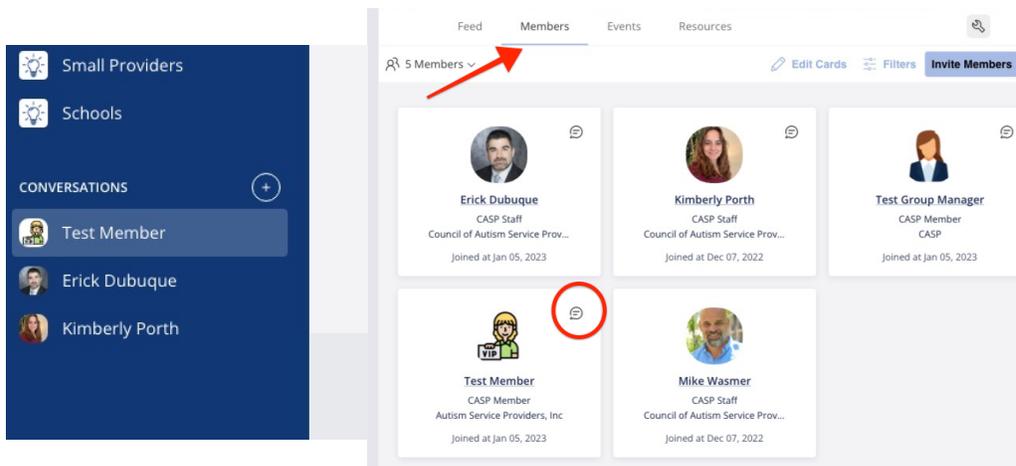
Email Frequency

1. By default, each member of the CASP Community will receive daily **“community highlights.”** This setting provides highlights from all groups that you have joined in a single email once a day.
2. However, if you wish to change the frequency, your personal settings will override this default. You can choose to receive **“group highlights”** (individual group highlights from selected groups) or **“immediate emails”**
3. To change your email frequency, click your profile pic (or the profile icon) in the top right corner of the page, then click the gear icon to update your profile settings.



Sending a private chat

1. To start a private chat with a member in Mobilize, find their profile in the group's member directory and click on the chat icon in the upper right corner of their profile (see image



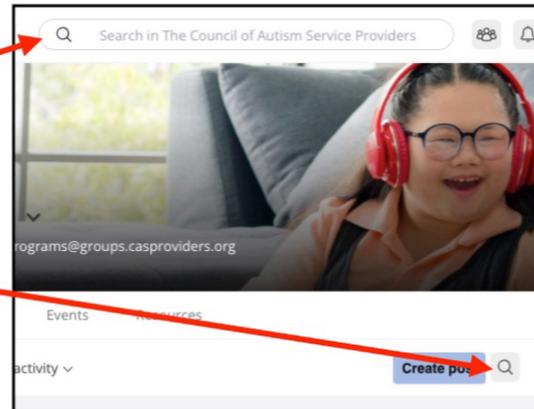
Getting started with Mobilize

2. Your active chats can be found under “Conversations” in the left column of the page.

Group Resources and Searching

1. Each group has its own dedicated Resource Center, where members can upload files, organize files into folders, highlight resources and provide links to URLs of interest to the group.
2. Members can search for items within the group you are currently in or all groups *you are enrolled in*. Search results are arranged by posts, members, groups, and resources. (see image)

- Search **ALL GROUPS that you belong to** (sorted by posts, members, groups, resources)
- Search the **SINGLE GROUP that you are currently in** (within Feed, Members, Events or Resources)



Please note: Resources stored in groups that you are not enrolled will not appear in your search results

Support and FAQs

1. Mobilize has excellent support features that are accessible to all members. If you have questions, click the question mark icon in the green circle on the bottom left of the page to access the online support center.
2. Download the Mobilize mobile app
 - [Google Play](#)
 - [Apple](#)
3. For responses to frequently asked questions, see [here](#).