



ADDING YOUR KEY PARISH LEADERS TO CLI PORTAL

1. As a Pastor or Parish Primary Point of Contact (PPOC), log into the Portal:

URL: <https://portal.catholicleaders.org/home/>

USERNAME: *your username*

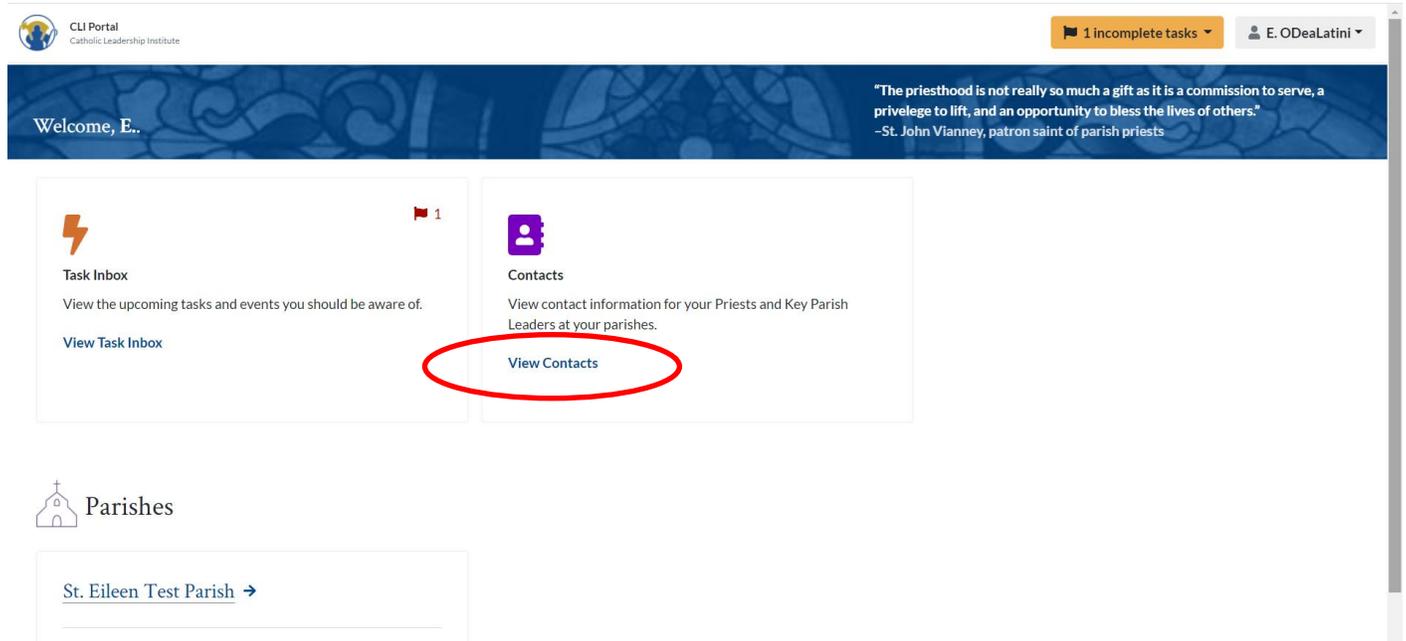
PASSWORD: *your password*

A. **Pastor:** Access your Homepage and select View Contacts.

A screenshot of the CLI Portal homepage. The header includes the CLI Portal logo, the user name "E. ODeaLatini", and a notification for "2 incomplete tasks". A blue banner contains a quote from St. John Vianney. The main content area has three cards: "Task Inbox" with a lightning bolt icon and a red flag with the number 2; "My Priest Profile" with a person icon and a "75% Complete Complete Priest Profile" status; and "Contacts" with a puzzle piece icon. The "View Contacts" link in the Contacts card is circled in red. Below the cards is a "Parishes" section with a church icon and a dropdown menu showing "Diocese of CLI" and "St. Eileen Test Parish" with a right-pointing arrow.

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B. **PPOC**: Access your Homepage and select View Contacts:



CLI Portal
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1 incomplete tasks | E. ODeaLatini

Welcome, E..

"The priesthood is not really so much a gift as it is a commission to serve, a privilege to lift, and an opportunity to bless the lives of others."
-St. John Vianney, patron saint of parish priests

Task Inbox 1

View the upcoming tasks and events you should be aware of.

[View Task Inbox](#)

Contacts

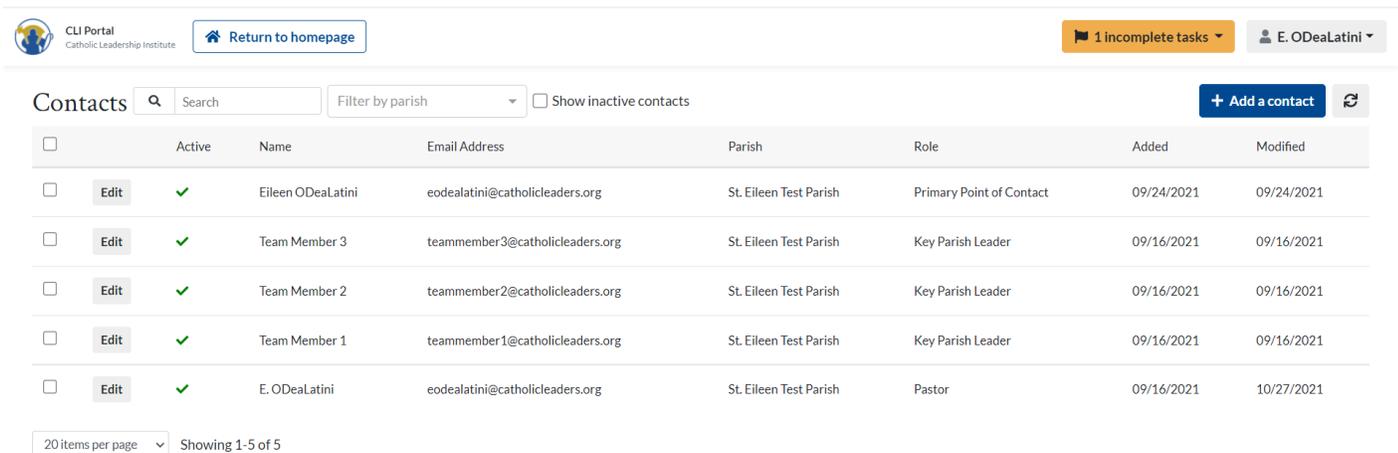
View contact information for your Priests and Key Parish Leaders at your parishes.

[View Contacts](#)

Parishes

[St. Eileen Test Parish](#) →

C. On the Contacts screen, click on +Add a contact button



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[Return to homepage](#) | 1 incomplete tasks | E. ODeaLatini

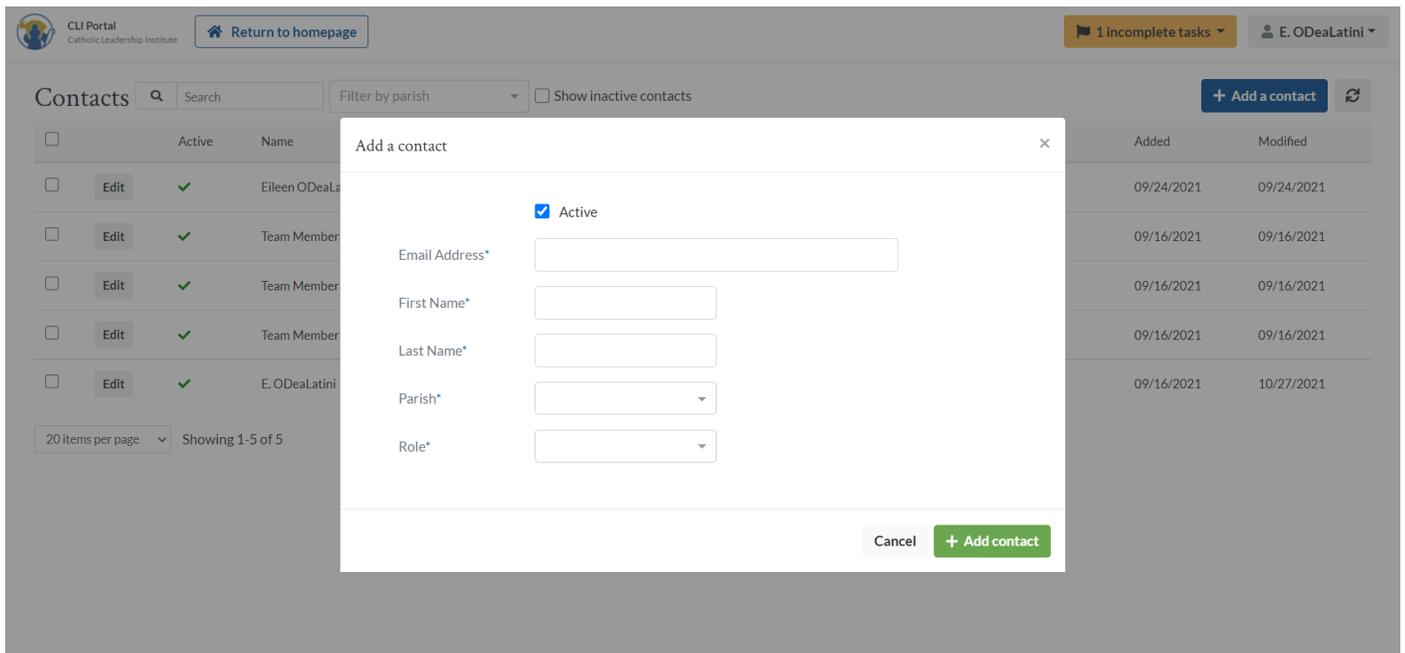
Contacts Show inactive contacts [+ Add a contact](#)

<input type="checkbox"/>	Active	Name	Email Address	Parish	Role	Added	Modified
<input type="checkbox"/>	<input type="checkbox"/> Edit ✓	Eileen ODeaLatini	eodealatini@catholicleaders.org	St. Eileen Test Parish	Primary Point of Contact	09/24/2021	09/24/2021
<input type="checkbox"/>	<input type="checkbox"/> Edit ✓	Team Member 3	teammember3@catholicleaders.org	St. Eileen Test Parish	Key Parish Leader	09/16/2021	09/16/2021
<input type="checkbox"/>	<input type="checkbox"/> Edit ✓	Team Member 2	teammember2@catholicleaders.org	St. Eileen Test Parish	Key Parish Leader	09/16/2021	09/16/2021
<input type="checkbox"/>	<input type="checkbox"/> Edit ✓	Team Member 1	teammember1@catholicleaders.org	St. Eileen Test Parish	Key Parish Leader	09/16/2021	09/16/2021
<input type="checkbox"/>	<input type="checkbox"/> Edit ✓	E. ODeaLatini	eodealatini@catholicleaders.org	St. Eileen Test Parish	Pastor	09/16/2021	10/27/2021

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- D. Enter the email address, First Name and Last Name of the person, click in the Parish field and select the parish name, click in the Role field [options are Key Parish Leader or PPOC] and select Key Parish Leader. Click on the [+Add contact](#) button.



- E. You will now see this new person on the list of contacts. This person will receive an email from the Portal telling them they have been added to the Parish; see below

<p>Subject</p> <p>New Contact Introduction</p> <p>Body</p> <p>Hello Mary Smith,</p> <p>You have been added as a point of contact for the St. Eileen Test Parish.</p> <p>Thanks,</p> <p>Catholic Leadership Institute</p> 
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- F. When reporting is turned on for the Disciple Maker Index Survey, Key Parish Leaders will receive another email with the title “New Contact Invitation to Disciple Maker Index Portal” with a link to the parish’s reporting. They will then be able to go into the Portal and look at the DMI data.

Dear Team Member,

Your pastor has invited you to be a point of contact and a member of the Disciple Maker Index Planning Team at St. Eileen Test Parish.

As a member of the team, you’ll have access to your parish’s results and will be expected to assist your pastor and parish community in understanding and communicating these results. This might include taking part in consultations about results and assisting in identifying priorities based on the unique strengths and opportunities of your parish.

We know this information is exciting, but it can also be overwhelming. We ask that you wait until you have begun your CLI consultation to share these results with your parish community, and not just publish the hard numbers. The information can be confusing or misleading without the proper context.

You can access the DMI portal at the link below to review your survey information and results.

<https://portal.catholicleaders.org/t/testlink>

Thank you again for your participation in the Disciple Maker Index! If you have any questions throughout the process, please contact us at onlinesupport@catholicleaders.org.

Blessings,

Catholic Leadership Institute