

CATHOLIC LEADERSHIP INSTITUTE PARISH SET UP IN PORTAL FOR DMI

Table of Contents

Accessing the Online Portal the First Time2	
Accessing the Portal After Account Setup3	
Completing the Parish Set Up5	

This document provides instructions for accessing and using the Catholic Leadership Institute Online Portal to complete your *Disciple Maker Index* Parish Set Up. If at any time you need assistance with the Portal, please email <u>onlinesupport@catholicleaders.org</u>.

It is recommended that you use Chrome, Microsoft Edge or Mozilla Firefox as your browser; Internet Explorer does not work. If you are on a Mac or Apple device, you can use Safari.

Accessing the Online Portal the First Time

Open the email you received from the Catholic Leadership Institute Portal and click on the link in the email.

This screen will appear:



If the email address is correct, click on Continue with this email address. This screen will appear:

	We	lcome to the CLI Portal!		
	An account has already been a	made for you using the email add	ress provide	
		Set Your Password		
	Set a password for your account.			
	Email Address	eod2@catholicleaders.org		
	Password	Password	٥	
	Confirm Password	Password	0	
🖌 Go back 🔓 Set password				

Type in a password and click on Set password.

The password requirements are specific and must meet the following standards: at least eight characters, including one lowercase and one uppercase letter, one number, and one special character (! @ # \$ or %). **Only** the special characters listed are accepted (so you **cannot** use a ?, &, or *) nor are spaces accepted

This screen will appear:

CLI Portal Catholic Leadership Institute		ĺ
	Email Address	
	Designed and the second	
	Password Show	é - F
	Forgot password?	
	Log in	
	If you need assistance logging in, contact onlinesupport@catholicleaders.org	
	By logging in, you agree to the Catholic Leadership Institute Portal Terms and Conditions (version 1.07) 🖒.	
	Test Parish Leader Survey - Test Peer Survey - Test Priest Invite - Test Priest Password Reset	
LAX .	YM	

Enter your username and your password and click on Log in.

Accessing the Portal After Account Setup

Go to **Catholic Leadership Institute Website:** <u>https://www.catholicleaders.org/</u> Select **Called for More Client Portal** from the Menu on the right side

Or to access directly:

WEB ADDRESS: https://portal.catholicleaders.org/home/

	Le.		
Email Address father@catholicleaders.org			
Password	X Hide	à	
Log in Forgot password?			
///			
	father@catholicleaders.org Password Log in	father@catholicleaders.org Password Reader Stress Hide Log in	father@catholicleaders.org Password Note: The second sec

Log into the Portal by entering your username (email address) and password.

If you have forgotten your password, then click on <u>Forgot Password?</u> on the log-in screen, enter your email address on the screen that appears and click on <u>Send Password</u> to send a password change email to your address. In your email, follow the instructions to reset your password.

For DMI-only users, you will land on a screen similar to the one below.



Completing the Parish Set Up

The Parish Set Up can be completed by either the Pastor or the Primary Point of Contact.

After you log into the Portal, the homepage will display. Click on the parish name:



This screen will appear:

CLI Portal Catholic Leadership institute Return to homepage	📁 0 incomplete tasks 🔻 💄 EileenQA Odea Latini 👻
Welcome, EileenQA.	"The priesthood is not really so much a gift as it is a commission to serve, a privelege to lift, and an opportunity to bless the lives of others." –St. John Vianney, patron saint of parish priests

Complete Parish Profile for QASt. John

A new parish has been associated with your account. Please complete the Parish Profile for this parish; you will not be able to continue to the portal until you have done so. If you believe this is an error, please contact support@buildableworks.com

Parish Information Provide address and contact information for this parish.

Parish Name*	QASt.John	
Diocese*	QA Test Diocese	
Deanery		-
Address Line 1*	123 Test Road	
Address Line 2		
City*	Philadelphia	
State*	PA	

C4M Parish Set Up (9.20.21) Page 5 There are 3 sections to the Parish Set Up process:

- Parish Information
- Primary Point of Contact
- Parish Demographics

Parish Information – add the correct information into the fields

Primary Point of Contact - If a Primary Point of Contact (PPOC) was not designated prior to beginning the DMI process, the pastor is defaulted to be the PPOC. To finalize the PPOC, go to the Primary Point of Contact section and do the following:

- If the name displayed in the drop-down list box is correct, click in the box next to "I am the PPOC for this parish"
- If you need to add a new PPOC, click on <u>Add a new contact</u> and enter the first and last name of the contact and the email address. Then click in the box next to "I am the PPOC for this parish".

Parish Demographics – answer the 4 questions that are displayed:

- How many registered households are in your parish?
- What setting is your parish in?
- What is your average number of weekly Mass goers?
- Which best describes your parish? (regarding your school situation)