



Catholic Leadership
INSTITUTE

CATHOLIC LEADERSHIP INSTITUTE PARISH SET UP IN PORTAL FOR DMI

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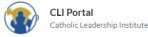
This document provides instructions for accessing and using the Catholic Leadership Institute Online Portal to complete your *Disciple Maker Index* Parish Set Up. If at any time you need assistance with the Portal, please email onlinesupport@catholicleaders.org.

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:



CLI Portal
Catholic Leadership Institute

Welcome to the CLI Portal!

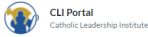
An account has already been made for you using the email address provided to us.

Confirm Your Email Address

Is this the email address you wish to use to set up your account?

eod2@catholicleaders.org [Change email address](#)

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



CLI Portal
Catholic Leadership Institute

Welcome to the CLI Portal!

An account has already been made for you using the email address provided to us.

Set Your Password

Set a password for your account.

Email Address

Password

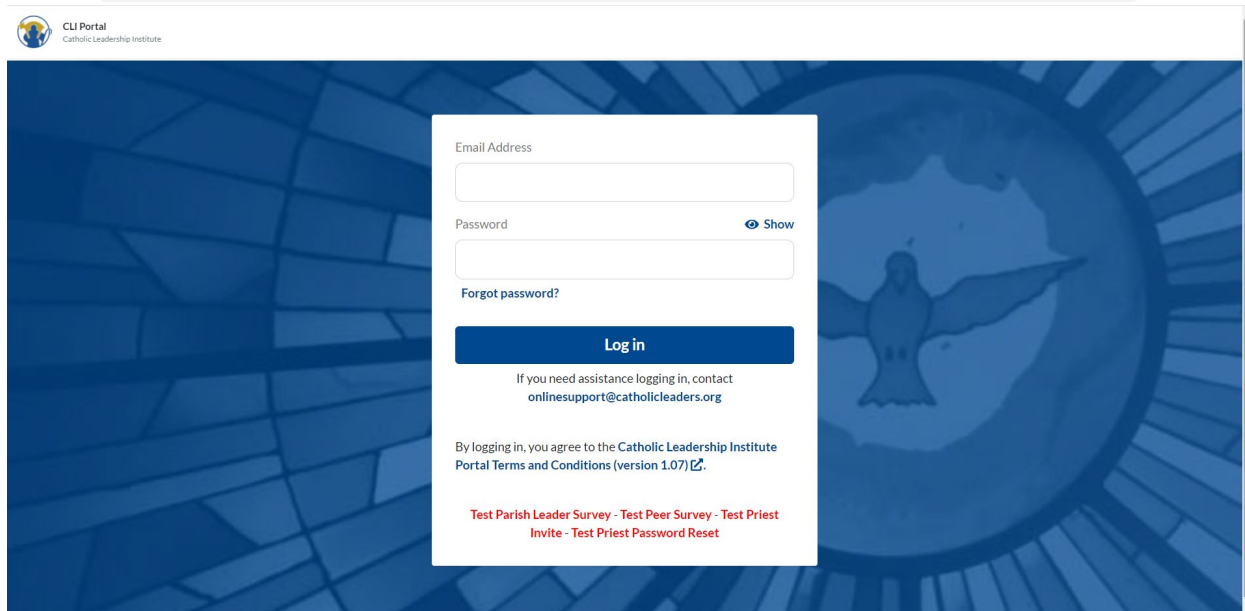
Confirm Password

[Go back](#)

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

Email Address

Password Show

[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](#)

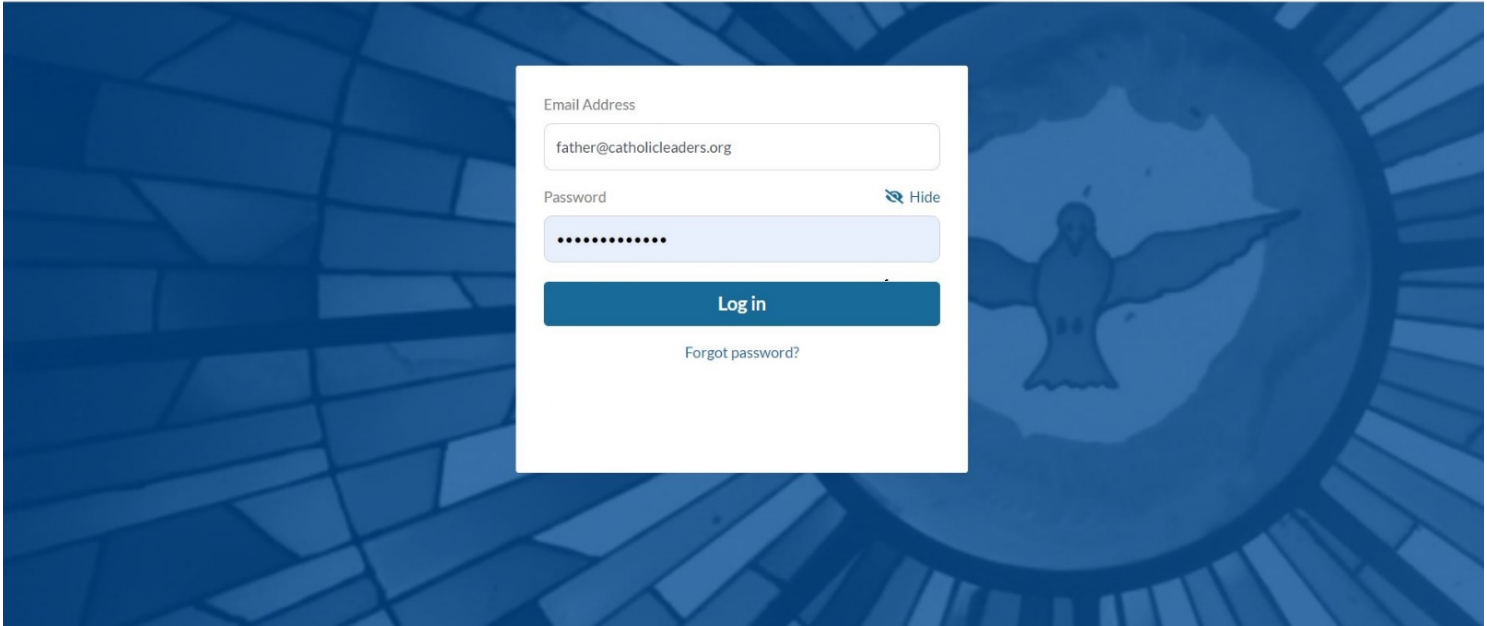
Enter your username and your password and click on Log in.

Accessing the Portal After Account Setup

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

Or to access directly:

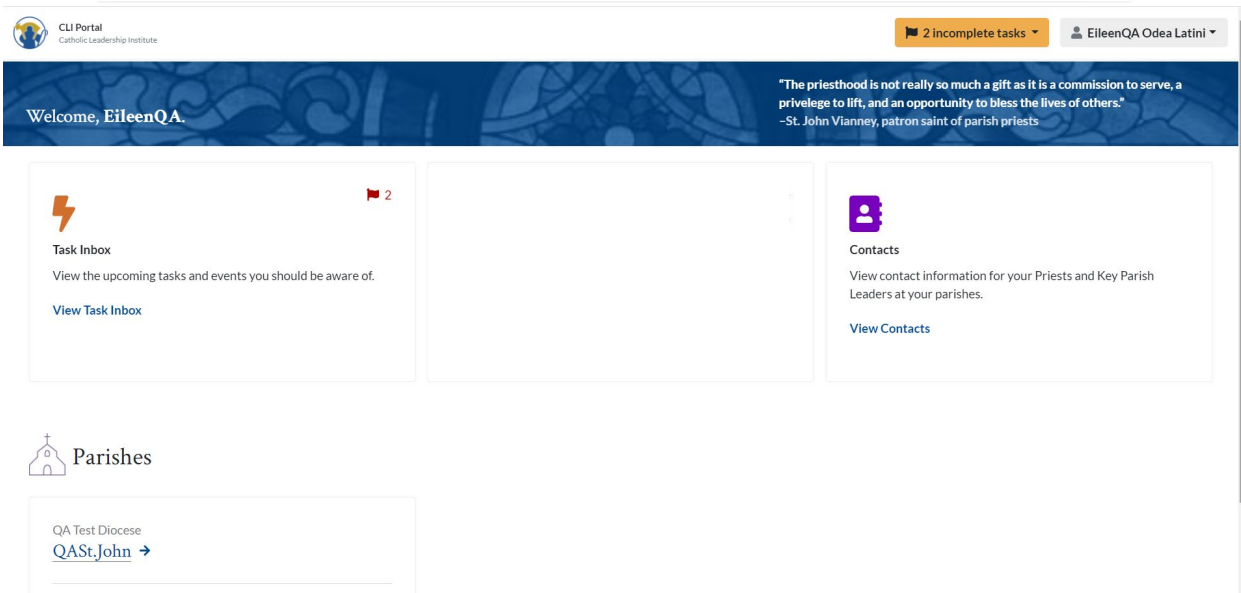
WEB ADDRESS: <https://portal.catholicleaders.org/home/>



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

If you have forgotten your password, then click on [Forgot Password?](#) on the log-in screen, enter your email address on the screen that appears and click on [Send Password](#) to send a password change email to your address. In your email, follow the instructions to reset your password.

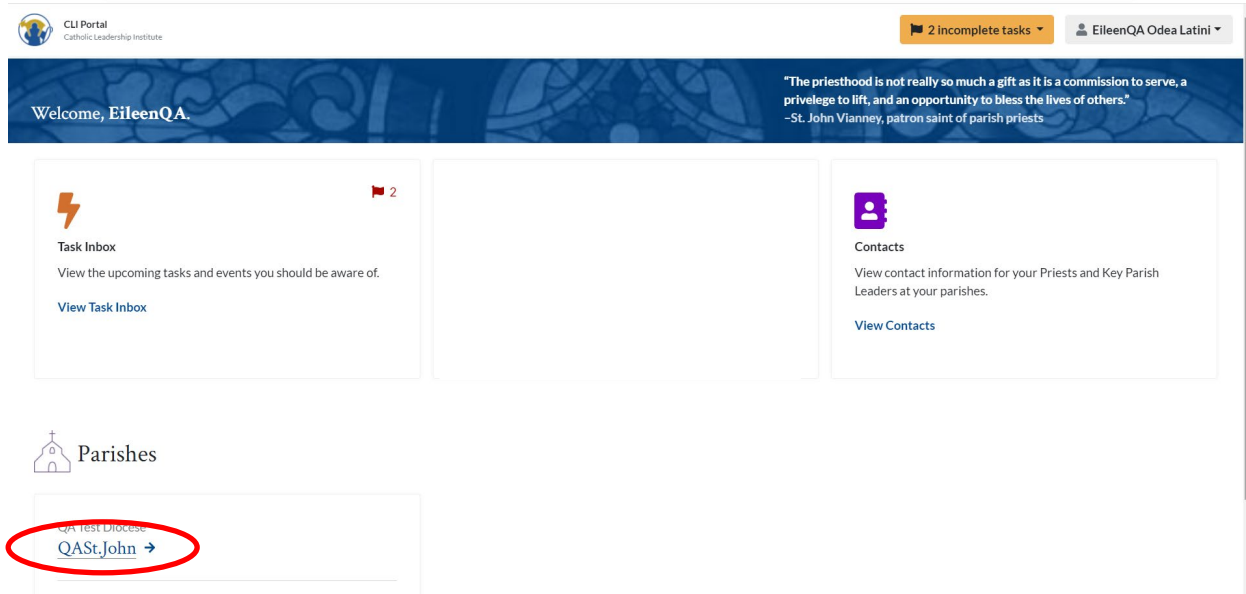
For DMI-only users, you will land on a screen similar to the one below.



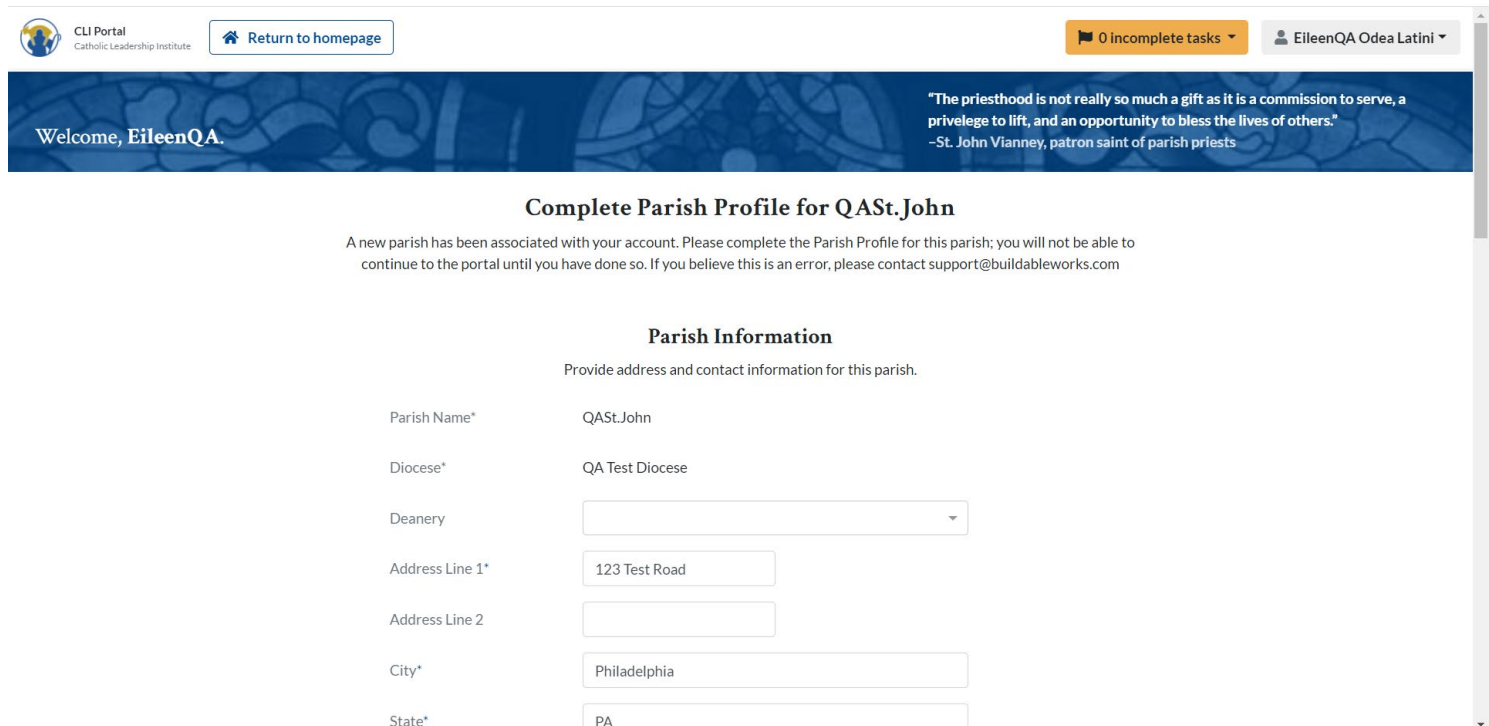
Completing the Parish Set Up

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:



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 Add a new contact 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)