



DISCIPLE MAKER INDEX QUICK START GUIDE

1. Once you have set up your username and password, log in to the Catholic Leadership Institute Portal at <https://portal.catholicleaders.org>
2. After logging in you should see a landing page like the one below. If you have completed the Parish Set Up described in the Parish Set Up guide, you can select your parish name at the bottom of the screen. If not, you will be prompted to walk through the process of confirming your parish details.

The screenshot shows the landing page of the Catholic Leadership Institute Portal. It features three main sections: "Task Inbox" with a lightning bolt icon and a notification badge, "Contacts" with a purple icon, and "Parishes" with a church icon. The "Parishes" section is highlighted with a red box and contains a list of links: "Holy Name Parish" with a right-pointing arrow, "DMI - All Analytics & Reports", "Data Snapshot", and "Parish Profile".

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

- [Holy Name Parish](#) →
- [DMI - All Analytics & Reports](#)
- [Data Snapshot](#)
- [Parish Profile](#)

3. After selecting your parish, you will land on the DMI Dashboard (pictured below.) Here you can:
 - a. view your schedule
 - b. access the survey link to share with parishioners
 - c. print paper copies
 - d. Review the demographic info you provided in your Parish Set Up.
4. Once on your Parish DMI Dashboard, you can view your **Parish Roadmap**, which contains Key Dates including Survey Open and Survey Close dates, the **unique link** you will share with parishioners to take the survey, and options for **printing paper surveys**.

The screenshot displays the DMI Dashboard interface. At the top, the 'Roadmap' section features a horizontal timeline with five key dates: 'Start promoting September 20th', 'Survey live October 14th', 'Continue promoting', 'Online survey closes November 22nd', and 'Paper surveys (if applicable) will be processed during a 4-6 week period after online survey closes'. Below this, the 'DMI Setup' section shows two completed items: 'Parish Information' and 'Schedule Roadmap'. The 'Survey Access' section contains two main areas: 'Online Surveys' with a share link and a 'Click to copy' button, and 'Paper Surveys' with a language selection dropdown and a 'Download' button.

5. Your **Parish Roadmap** contains key dates to remember.

This screenshot shows a detailed view of the 'Roadmap' timeline. The key dates are: 'Start promoting January 31st', 'Survey live February 17th', 'Continue promoting', 'Online survey closes March 22nd', and 'Paper surveys (if applicable) will be processed during a 4-6 week period after online survey closes'. The timeline ends with the instruction 'Interpret results and plan for the future'.

6. Your **unique survey link** can be found on this dashboard. Copy this link to paste it into your bulletin announcements, emails, or web page and social media posts to invite parishioners to complete the survey. (This link will not be active until the Survey Live date as seen on the Roadmap.)

Survey Access

Online Surveys

Share Link:

<https://portal.catholicleaders.org/d/kyxbck>

[Click to copy](#)

7. **To print paper copies to** distribute to parishioners, select the language you would like to download in the dropdown bar in the “Paper Surveys” box, which can be found directly below the unique link. The survey is available to be taken in 17 different languages.

Paper Surveys

Select a language to download printable PDF surveys.

Language

English

French

French (Canadian)

Haitian Creole

DI Italian

Lea Kinyarwanda

8. After selecting your language from the dropdown, click on the download button below the dropdown box. It will turn blue when you hover over or click the button.

Online Surveys

Share Link:

<https://portal.catholicleaders.org/d/k3x83k>

[Click to copy](#)

Paper Surveys

Select a language to download printable PDF surveys.

English

[Download](#)

- 9. The file will download immediately. When viewing the paper survey, verify that the correct Diocese, Parish, and Pastor Name are all displayed on the front cover. DO NOT REMOVE this page when printing and distributing, as it is the only way CLI can identify the correct parish when processing paper surveys.

Below is the cover page of the Disciple Maker Index Survey.



Catholic Leadership
INSTITUTE
Disciple Maker Index Survey

Diocese: Diocese of Saginaw
Parish: CLI Parish
Pastor: Mike School

Dear Parishioner,

Thank you for participating in the Disciple Maker Index survey. This survey will provide you the opportunity to reflect on your own spiritual growth and provide feedback on the efforts of the parish to help you grow.

The survey should take you between 10-15 minutes to complete. Please do not skip questions unless instructed to do so. Please note that your responses are kept confidential. Your parish and Catholic Leadership Institute will not have access to individual survey responses.

We thank you again for your participation in this important initiative!

- 10. On your main DMI Dashboard you can monitor response counts while the survey is live. Responses are updated 2-3 times per day. You may need to scroll down to view the response updates.

Analytics & Reporting

[View all analytics & reports →](#)

Once your DMI is set up, you will have access to analytics on survey performance.

