Managing Approved Drivers

If you are responsible for managing approved drivers at your location, please email cmgconnect@catholicmutual.org to request access to your site.

This short guide includes instructions to:

- View users at your location and confirm approved driver status
- Look up users within the arch/diocece to verify driving status
- Pull curriculum reports to view who has completed training at your location

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Administrative Tab Views

The tabs to the left of your screen allow you to access information about your specific location.

- **My Training**—will give you access to take training for your own training.

- **Users**—will pull a list of users at your location; you can also search for Approved Drivers in the diocese

- **Resources**—access resources such as this coordinator guide, end-user instructions, and any other documents the diocese has available to assist you in your role

- **Curriculums**—will allow you to run reports to see which users have completed the Required Defensive Driving training

- **Children's Data**—N/A

- **Inbox**—N/A

- **Edit Profile**—where you can update your own profile (address, participation category, password, etc.)

- **Logout**—log out of the platform
Users Tab
This tab allows you to pull up a list of your location's end-users. From this page you can view user profiles, edit demographic information, inactivate users, export your user list, and search for users within the diocese.

You can view a driver's certification status at a quick glance on this page. Users with a current MVR will be marked as Approved Driver, Declined Driver, or Driver not recommended.

Star—allows you to create a 'secondary user list' to keep for those who frequently volunteer at your parish/school; would be used when searching in the entire diocese.

Eye—allows you to view the user account.

Search User in Diocese—allows you to search for users that are volunteering at your parish/school but are not primary to your location. You will also have the option to star them for your secondary user list.

Export CSV—allows you to run a report of your users to sort and view a complete list of users at your site and who has an Approved Driver status. The downloaded document will open in Excel. 
Note: If you would like to save your downloaded file, change the file type to 'Excel Workbook' rather than 'CSV (Comma delimited)' to retain formatting changes.

Add New—allows you to create a user account, although it is highly recommended to have the end user create their account themselves.
Users Tab (continued)
Hovering your mouse over the Users tab will offer different page options: view all users, look at your ‘starred’ secondary list, and any archived (inactive) users for your location.

All Users
This list is of all the individuals who have selected your location as their primary school/parish/organization. Note that this list will also show by clicking the main “Users” button.

Secondary User List
This list will not have any users listed unless you specifically select them. Typically this is used for volunteers who frequently help at your location, but are still a primary user at a different location.

Archived
User data is never completely erased from the system. If you accidentally archive an individual on your All Users list, go here to recover their account.

All Users
View a user’s account overview by clicking the eyeball icon:

User Information: User Contact information
Associated Categories: Identifies what category that user is (Employee, Volunteer, Priest, etc.)
Certification Status: Approved Driver status
Background Check Status: Motor Vehicle Records (MVR) and other documentation for background check approval

CMG Training Activity: Shows completed and in-progress trainings the user has completed in this system
Imported Trainings: Historical trainings uploaded from the previous platform—driving, safety training, etc.
Imported Live Trainings: Historical live trainings are housed in this area (if applicable)
Users Tab (continued)

Secondary User List
This page will list any users within the diocese whom you have selected as a secondary user by clicking the star icon.

Please keep in mind that this list is individual—that is, users you add to your own Secondary User List will not appear on lists for other administrators, even if you are admins for the same location.

Export Users - Exports an excel document of all the secondary users on this list.

Gold Star Icon - To remove a user from your Secondary User List, click the yellow star. This will de-select them as a “favorite” and they will no longer appear on the list. Users can be added back to the list at any time by repeating the process of finding their account under All Users and/cr Searching the Diocese then selecting the Star icon.

Eyeball Icon - View user account information for individuals who are not at your site. This icon will pull up the account overview which shows the user’s location, personal information, certification status, and training activity.

Archived User List
To recover an archived user at your location, click “Archived” under the Users options. Clicking the red arrow button will recover their account. They will retain all their training information and reappear on your user list.
Certification Status Definitions

Driver has completed training and their MVR results were cleared. 
**Covered by insurance.**

User may have less than 3 incidents/ moving violations within the past 3 years. 
**Covered by insurance, but use your own discretion to allow driving assignment.**

User has citations and/or convictions that fall under the “MVR Rejection Guidelines” shown below. **Not covered by insurance.**

MVR is missing correct data. (Ex: User submitted inaccurate driver's license #, date of birth, etc.)
**PLEASE CONTACT YOUR MEMBER SERVICES REPRESENTATIVE TO RESOLVE.**

MVR REJECTION GUIDELINES

MVR reports with any of the following citations or convictions in the last three years will be marked as “Declined Driver”:

a. Driving under the influence of alcohol or drugs.
b. Hit and run.
c. Failure to report an accident.
d. Negligent homicide arising out of the use of a motor vehicle.
e. Operating a vehicle during a period of suspension or revocation.
f. Using a motor vehicle for the commission of a felony.
g. Operating a motor vehicle without owner's authority (grand theft).
h. Permitting unlicensed person to drive.
i. Reckless driving.
jj. Speed contest.
k. Any combination of accidents and moving violations which total three (3).
l. Drivers license expired/revoked/suspended.
m. No record of a drivers license found (more information may be needed).
n. International drivers license.
Curriculums

To run a report for training compliance at your location, click the **Curriculum** tab. All the diocese curriculum will be listed. Search for the Required Driving Curriculum to run reports.

**Export Users**: Pulls users who have completed the selected curriculum into an Excel spreadsheet. This report will show users’ percent of progress as well.

**Export Data**: Pulls users and their data into an Excel spreadsheet.

**View Curriculum**: Pulls users that have completed or started the selected curriculum (see below).

"View Curriculum" will show you the users that have completed the curriculum as well as those who have started the curriculum but have not yet finished it.