Welcome to CMG Connect!
This guide is your first step to preparing yourself as a resource for the individuals at your site who will be completing training. Review this document when you are beginning your role as a new coordinator and keep it on hand for when you have “how-to” questions about the system. If you can’t find the answer to your questions in this document, the CMG Connect team is ready to help you at cmgconnect@catholicmutual.org.

We’re excited to provide convenient online training for your Diocese—let’s get started!

Access CMG Connect at your custom link:
https://Steubenville.CMGConnect.org

It is recommended to use Google Chrome for full functionality.

Please note: Images in this guide are for demonstration purposes only—changes on the live platform will reflect customizations made by your Diocese.
General Information: Definitions
Defining a universal set of terms will help us to help you! Please familiarize yourself with the terms below as they will be used throughout the guide.

User: Any person who is accessing the CMG Connect training platform; an end-user refers to non-administrative individuals.

Site: The location/school/parish/organization to which a user is affiliated. Users can only select one site as their primary location.

Curriculum: (right) Any individual module that appears under the Required Training or Optional Training Curriculum areas on a user’s training Dashboard. Each curriculum is made up of different pages.

Curriculum page: (right) components of a training that make up a curriculum. Pages will reflect the progress of your training. If it is grayed, you do not have access to that page yet and need to complete the page before.

Please note that video training pages require watching the entire video before progressing to the next page. If you leave the training at any time during the video, it will restart upon return.

Certification (Status): (below, left) A certification status signifies whether or not a user has completed the components necessary for Safe Environment compliance. A “Yes” certification indicates compliance and shows up as a green star (left). Please see next page for more details regarding statuses.

USCCB Role: (below) Referred to simply as “Role” at account registration, users select from these 6 major categories: Employee, Candidate for Ordination, Priest, Deacon, Educator, Volunteer. These are used by the United States Conference of Catholic Bishops during the auditing process to define individuals who are Safe Environment certified.

MVR: Motor Vehicle Record; entered and viewed in the Background Check Status section of a user’s account page. This may not apply to your diocese.
**General Information: Certification Status Definitions**

Certification Statuses are a key part of identifying completion of Diocesan requirements. Understanding what these statuses mean will help you manage your records and verify compliance of your users.

**Please note that there are multiple options to select when applying a Certification Status.**

**The list below includes the ONLY statuses which are currently in use by the Diocese. These are subject to change.**

<table>
<thead>
<tr>
<th>Certification Status</th>
<th>Description</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yes</strong></td>
<td>User has completed all Safe Environment requirements for the Diocese and is approved. <em>(Current Foundation/Renewal Training + Diocesan Policy Acknowledgement + Screening/Background Check)</em></td>
<td>![Yes Icon]</td>
</tr>
<tr>
<td><strong>Renew</strong></td>
<td>User has previously met all Safe Environment requirements but needs to complete Annual Renewal Training.</td>
<td>![Renew Icon]</td>
</tr>
<tr>
<td><strong>Incomplete</strong></td>
<td>User has no record of Foundation OR Renewal training and/or background check screening requirements are missing.</td>
<td>![Incomplete Icon]</td>
</tr>
<tr>
<td><strong>No</strong></td>
<td>User is <strong>NOT</strong> approved to work with children and/or vulnerable adults. <em>Please contact Diocese for more information.</em></td>
<td>![No Icon]</td>
</tr>
<tr>
<td><strong>Expired</strong></td>
<td>User's training is expired. If previously in compliance, they must complete Renewal training within grace period.</td>
<td>![Expired Icon]</td>
</tr>
<tr>
<td><strong>Deceased</strong></td>
<td>User is deceased. <em>Please archive account from your user list.</em></td>
<td>![Deceased Icon]</td>
</tr>
</tbody>
</table>
General Information: Responsibilities
As a Safe Environment Coordinator for the Diocese of Steubenville, you are responsible for key functions in the process of making sure a safe environment is being maintained for the safety of your children and young adults. Thank you for your willingness to accept this responsibility of managing training and certification for your site(s).

Safe Environment Coordinator Responsibilities

- Once you have created your own account, you are required to email: cmgconnect@catholicmutual.org to be given site administrator credentials.
- Ensure that communication is sent to users who are nearing expiration for safe environment certification.
- Enter that "Letters of Recommendation" from at least two previous employers have been confirmed. The applicant may provide an additional letter from a professional reference. A Letter of Recommendation from a close friend or relative is not acceptable.
- Manage user profiles and assist end users with questions.

NOTE: If a user has completed the safe environment training on CMG Connect they have also completed: Applicant Certification Form, Criminal Background Check, Acknowledged the Code of Conduct, and Safe Environment Training.

Diocesan Administrator Responsibilities

- Assign site administrator credentials to accounts.
- Check user account for references checked entry.
- Review background check results via the CMG Connect administrative dashboard.
- Assign certification statuses to user accounts.
- Assist SECs with learning and utilizing CMG Connect as well as addressing direct questions from end users.
- Oversee CMG Connect operations for the Diocese of Steubenville.

We strongly recommend using Google Chrome as your web browser for optimal performance of the CMG Connect platform.

For technical assistance, please refer to the Support Tab at the top of your screen.

If you still need assistance, please email cmgconnect@catholicmutual.org and further describe your issue so someone can assist you.
General Information: Curriculums Contents and Timelines

The curriculum title will be what shows up on user profiles when you’re looking at what training has been completed under their CMG Connect Training Activity.

All users will need to create an account in CMG Connect and complete the new curriculum associated with their participation category. The categories below include the curriculum components they are required to complete.

- **Employees, Volunteers:**
  - Decree video
  - Code of conduct
  - Abuse document
  - Boundaries document
  - Reporting policy
  - Safe Haven video segments 1, 2, 3 with questions between each
  - Background check with Selection.com

- **Catechist, Teachers:**
  - Decree video
  - Code of conduct
  - Abuse document
  - Boundaries document
  - Reporting policy
  - Safe Haven video segments 1, 2, 3 with questions between each
  - Theology of the body
  - Guidelines of teaching
  - Background check with Selection.com

- **Clergy (Priest, Deacon, Candidate for Ordination):**
  - Decree video
  - Code of conduct
  - Abuse document
  - Boundaries document
  - Reporting policy
  - Safe Haven video segments 1, 2, 3 with questions between each
  - Theology of the body
  - Guidelines of teaching
  - Internet usage policy
  - Background check with Selection.com
End-Users: How to Create an Account

Go to [https://Steubenville.CMGconnect.org/](https://Steubenville.CMGconnect.org/) to create your account and access all training. New users should fill out all the required fields in the “Register for a New Account” section.

**We strongly recommend using Google Chrome as your web browser for optimal performance.**

If you cannot remember your username and/or password, please click ‘Forgot Password’ on the Sign In Here page. If you do not have a valid email address associated with your account, please contact cmgconnect@catholicmutual.org for a manual reset.

Site Admins: You WILL NEED to CREATE a NEW ACCOUNT. You are required to email the diocese for site administration credentials.

Select the participation category that best describes how you work or volunteer at your location. This will allow the platform to automatically assign the correct required training(s) to your dashboard.

If you are unsure of what category to select, please contact your safe environment coordinator or the Diocese.

Users wanting their accounts in Spanish can switch their language at the top of the page prior to registering for their account.
Administrative Tab Views
The tabs to the left of your screen allow you to access information about your specific location.

If you cannot view the tabs at the bottom of this list, either zoom out of your page or position your mouse over Dashboard, then scroll down.

- Dashboard—will bring you back to the main administrative screen.

- My Training—will give you access to take training for yourself. The first time you select this the system may have you update your own account. If this is the case, update and save. Click My Training again and your requirements will show up.

- Users—will pull a list of users at your parish/school.

- Resources—access resources posted by the diocese such as this coordinator guide, an end-user guide, and any other documents to help perform your responsibilities

- Curriculums—will allow you to run reports to see which users have completed trainings for CMG Connect curriculums.

- Live Events— the diocese is not using this feature at this time.

- Reports—an area to run customized reports for your location. Hover your mouse over this tab to select either a comprehensive report of your location or use the Export Builder.

- Children’s Data—add Children’s Training through this tab.

- Inbox—any automated messages that the platform attempts to email you will also be housed here. If your users do not have a valid email in the system they can login to check for these messages in their account.

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

- Logout—to log out of the platform.
Dashboard: Site Admin

Your coordinator dashboard will give you access to site administrator credentials. You can pull up users for your primary parish and identify individuals who are 60 days from expiration.

If you are a site administrator over more than one location, you can toggle between sites (assigned by the diocese) from the top of your main dashboard. You can also change which location shows up by default, your Primary location, on the right side of the screen.

Dashboard: Change Primary Site

To change the location that will appear as your default dashboard, click on Change Primary Parish

Choose a location from the drop-down list, then click Proceed
Dashboard: BG Checks/Certifications Expiring within the next 60 days
These sections show upcoming background check and certification expirations. If the account(s) have a valid email address, the individual will be notified when their background check or certification date is nearing expiration.

Once an individual’s background check or status has reached its expiration date, they will no longer appear on this list. Pulling a list to view individuals with an expired status or background check date can also be done via the Users tab or from the Export Builder.

Dashboard: Contacting for Expiring Background Checks/Certification
SECs can also contact individuals from the main dashboard to fulfill any recertification requirements. The system does send an email 60 days prior to expiration to individuals if they have a valid email address in the system, as well as a message in the platform Inbox.

1 - Search for individuals on the list
2 - Directly access the individual’s account overview by clicking their name
3 - Sort individuals via different column headings
4 - Email individuals directly (click address to open your default email program)
Users Tab: Overview

This tab allows you to pull up a list of your users. From this page you can view, edit demographic information, inactivate users, export your user list, and search for users within the diocese.

In addition to First Name and Last Name, there are search fields for Maiden Name as well as filter selections for Certification Status and sorting by USCCB Role.

You can also sort your user lists alphabetically by clicking headings at the top of the list. A small arrow icon will appear to show the sort order.

Star—allows you to add users to a ‘secondary user list’, or those who frequently volunteer at your church/school but are primary at a different location; would be used when searching in the entire diocese.

Eye—allows you to view trainings and screening records on the user's profile.

Edit—allows you to update demographic information for the users at your church/school.

File—allows you to archive a user's profile and remove them from your list.

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

Detailed instructions for using this function can be found on the next page.

Export CS V—allows you to run a report that will capture the user's name, location (site), username, USCCB role, certification date and status, background check date, last login date, and when the account was created. 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 ‘CS V (Comma delimited)’ to retain formatting changes)
Users Tab: Search User in Diocese

The Search in Diocese function allows you to look up individuals (by last name) with accounts on CMG Connect who are not listed as primary users at your location.

Search Results Using the 'Search in Diocese' Function

Search results will show any users in the diocese who meet your search criteria, including individuals whose accounts have been archived (see outline).

**NOTE: If using Internet Explorer, you may experience an error page when you click 'Search'. Hit F5 on your keyboard to resolve.**

Similar to your location User list, you will be able to view at a quick glance if a person is certified and their certification date (circled below).

To add an account to your Secondary User List for quick access, click the star icon. The account will be added to the list accessible under Users > Secondary User List.

Please contact the Diocese or CMG Connect if you need to recover an archived user who is not primary at your location.
Users: View User Profile
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 training profile by clicking the eyeball icon:
- **User Information**: Contact information
- **Associated Categories**: Identifies what category the is selected on the account
- **Certification Status**: "Yes" indicates compliance of diocesan Safe Environment Requirements *(See page 3)*
- **Background Check Status**: Date and type of background check(s) on file for the individual
- **CMG Training Activity**: Shows completed and in-progress trainings the individual has completed in CMG Connect
- **Imported Trainings**: Uploaded historical training data provided by the diocese from previous platform(s)
- **Imported Live Trainings**: Historical live training dates are housed in this area (if applicable)
**Manually Entering Reference Checks**

For users who have completed their references, you will need to manually enter this information to the training record.

Please be sure to **ONLY** complete this process after the reference check has been completed for the individual.

Look up the individual under the Users tab*. Then click the eyeball icon to view their profile. From this page, you can enter a completed training by clicking the edit icon (    ) in the CMG Connect Training Activity box.

*If individual DOES NOT have an account in the system, you will need them to do this.*

Enter the date the references were checked. In the next box, select the title for completed from the dropdown list. Click **Create** when finished.
Users Tab: All Users

All Users
Edit the demographic or contact information for a user by clicking the edit icon:

Or click to create a new user account. A user’s profile includes how they participate with their location. Please note these categories are customizable by the diocese and subject to change.

Note: You can edit demographic information or update email addresses for your primary users. This is also where you can reset a password for your user. Click directly in the box and type—we recommend something generic and then advise them to change it once they log in.

Emails are NOT required in this new platform, however you WILL need to put in the address, city, state, and phone number when editing an account for the first time. If you do not know this information you will just type anything as a place-holder. Examples include: . - ; / *

Select the description(s) that apply to how the user primarily works or volunteers at your location/within the diocese (This is how the system "assigns" training curriculums to user training dashboards)

Edit/Reset password or username.

Switch a user’s Language Settings to English (EN) or Spanish (ES)

Click 'Save' to keep changes
Secondary User List
This page will list any individuals within the diocese whom you have selected as a "secondary user" by clicking the star icon.

Please keep in mind that this list is kept on an individual basis—that is, individuals that you add to your own Secondary User List will not appear on lists for other safe environment coordinators, even if you are SECs at the same location.

Export Users - Exports an Excel document of all the accounts you "starred" to be on this list.

Gold Star Icon - To remove an individual from your Secondary User List, click the yellow star. Individuals can be added back to the list at any time by repeating the process of finding their account with the "Search User in Diocese" function then selecting the star icon.

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

Archived User List
To recover an archived individual at your location, click “Archived” under the Users tab options. Clicking the red arrow button will recover their account. They will retain all their training information and reappear on your main list of individuals. **If you need to recover an archived account from a DIFFER location, please contact the Diocese or email cmgconnect@catholicmutual.org for your request.**
**Search and Select Users to Merge**

Search for each user under primary and secondary individually. Click on the plus icon to ‘add’ that account to either the primary or duplicate user information.

Once the Primary is selected, complete a search for the duplicate account to be merged:

Click the plus icon to select the duplicate user. When both accounts are selected, check to make sure you have chosen the correct account for primary so the right information will merge. If you made a mistake with your selections, click ‘Select Again’ and repeat the process to choose the correct account.

**Merge Accounts**

When you have selected both accounts, the red button will appear. Click “Merge Users.”

**MERGING USERS CANNOT BE UNDONE**

Make sure to check both user profiles to ensure the accounts truly need to be merged.
Curriculums

To run a report for compliance numbers at your location, click the Curriculum tab. All the Diocese curriculums will be listed. You have the option to run reports or view compliance for each individual curriculum. To run reports for multiple curriculum, use the Export Builder located under the Reports tab.

Export Users: Pulls a list of individuals that have completed that specific curriculum into an Excel spreadsheet. This report will show percent of progress as well.

Export Data: Pulls same user information as the “Export Users” option, as well as individual responses to each question within the curriculum. Results are downloaded as an Excel spreadsheet.

View Curriculum: Shows individuals that have completed or started the selected curriculum (see below). This option will show you the individuals that have completed the curriculum and those who are only partially complete.
Reports / Export Builder Feature

To run reports for multiple curriculum and to select custom criteria for your report, you will be able to use the Export Builder located under the Reports tab.

Users with Trainings
Pulls a full report for your location with all historical trainings and current trainings.
*This report may take several minutes to load.*

Export Builder
Allows you to select what specific information you want to include in a report to view in an Excel file.
*This report may take several minutes depending on the amount of data you are reviewing.*

- **Select Users Data**
  - This area allows you to select demographic information about the individual along with certification status and background check date.

- **Select Users Curriculums**
  - This section allows you to select any trainings that are currently offered in CMG Connect. Each option selected shows up as a separate column in the exported Excel spreadsheet.

- **Select Users Imported Trainings**
  - This area allows you to include any training that was uploaded as historical data.

- **Select Users Live Trainings**
  - This area allows you to include any live trainings that were part of historical data.

- **Select Background Checks**
  - This area allows you to further specify a background check type and/or dates of previous background checks.
Microsoft Excel: Working with Your Downloaded Report(s)

Once you have the file open, your excel will look like the screenshot below. To expand the columns so you can view all of the contents of each cell, click the gray arrow to the left of Column A and above Row 1 (circled).

This will highlight the entire sheet. Move your mouse between Column A and Column B so that the mouse changes to the “split” arrow shown to the right, then double-click.

Your columns will now be auto-fitted to their contents. If you want to make all of the columns the same width, drag and drop the “split” arrow while the whole spreadsheet is highlighted.
Using the Filter Tool

One of the most helpful tools for managing reports within Excel is the Filter, which allows you manipulate what information you view based on the contents under each column heading.

To apply a filter, select Row 1 of your spreadsheet by clicking the “1” on the far left. This will highlight the entire top row of the spreadsheet.

Once Row 1 is highlighted, locate “Sort & Filter” at the top right of your Excel window. Then select “Filter” from the list of options that appear.

This will apply small drop-down arrows to each column in the first row.

To “filter” results for any column, click the arrow in the top row to open up your options. This menu is shown in the screenshot below. Within this menu, you can Sort (alphabetically and/or by formatted color) or Filter based on the contents of the column.

For example, if you want to only view users who are a specific USCCB category, you can type in the desired criteria in the “Search” box. You’ll see that the list below begins to shorten as you type. When only the category you want is selected, click OK.

This will make the spreadsheet filter to ONLY view users who have the specific participation category checked off on their account in CMG Connect.

TO CLEAR ALL FILTERS FROM YOUR REPORT, CLICK ON SORT & FILTER AT THE TOP OF THE PAGE THEN CLICK
Formatting Column Width / Hiding Columns

If you pulled a report with columns that you don't want to view, you can choose to Hide the information without deleting it from the spreadsheet. In the image below, I wanted to Hide the Categories column. First, right click on Column E (click the E above the top row), then select “Hide” from the menu options that appear.

If you want to view a hidden column again, select the surrounding columns (in this sample, click and drag to select Column D and F), then right click. Select “Unhide” from the menu.

From this point, it may easier to adjust the width of the training record columns so all of your information can be seen without needing to scroll so far to the right in your spreadsheet.

Highlight the columns for the selected trainings by clicking the letter above the column and dragging in either direction to select multiple columns that are next to each other (in this example, Columns F, G, and H).

Then, move your mouse between the columns so the “split” arrow icon appears again. Click and drag to adjust the width of the columns so they fit on your screen along with the other columns in the spreadsheet.

This will cut off the words in the top row— if you would like to be able to see the full title/contents of the column, click “Wrap Text” while you still have the columns selected.
Sorting by Site Name (Diocese-level Report ONLY)

For easier review of a full report by location, you can sort alphabetically by location to organize the list of users. **Note: In order to sort by Site Name, you must select it in the Export Builder when initially running your report.**

Click the drop-down arrow for the Site Name column, then click **Sort A to Z.**

Reviewing Training Records

The dates under each “training column” heading reflect when the user finished that curriculum. Please keep in mind that results from the Export Builder **DO show in-progress trainings.**

When reviewing if an individual has completed training, look up their name (either manually or using the Filter arrow in Column A or B to select them) then look under Columns F, G, and H to see if they have a completion date. You can also filter by completion date for each curriculum/column. This process can also be done within CMG Connect using the "View Curriculum" option.

In the sample shown, we can see that Francisco Manriquez from Cardinal Newman High School completed the “A. Sexual Harassment Training (Enquiron)- California” on 11/2/2017.

To remove an applied filter, such as the filter I put on the Last Name “Manriquez,” click on the filter icon for that column (circled in the image to the right) then click **Clear Filter from “COLUMN NAME”**.
**Saving the Report**

When saving your spreadsheet, make sure to change the file type to retain all of your formatting changes.

Select where you want the file saved, then click the drop-down list for “Save as type” to select ‘Excel Workbook’ rather than ‘CSV (Comma delimited)’

Click ‘Save’

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**Printing the Report**

To print your report of individuals, go to File > Print.

For best printing/viewing results, you'll most likely want to change your print settings.

Change the page orientation to “Landscape Orientation” in order to fit more columns.

Under the last option for scaling, select “Fit All Columns on One Page” so all of your columns will be together on a single page.
Children's Data (REQUIRED)

Enter children's training data on this tab by clicking **Add New** and filling out the information.

After the entry has been saved, training data can be viewed or edited.

To export all site trainings to a spreadsheet, click **Export CSV**. 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.**

You can also click **Training Data Report** to pull a report that can be printed as a hard copy, then signed by the location's Priest/Pastor that can be provided to the Diocese.
Resources
Any documents or resources the Diocese would like admins to have on hand can be found here. Resources can include user guides, webinar trainings, Diocesan policies and more. If looking for a specific document, you can use the search tool in the upper right.

Edit Profile
Edit your own account information by clicking Edit Profile on the left side of your screen. On this page, you can change any of your user profile information.

Update any changes with your participation category, USCCB Role, or any other personal user information.

You can also enter an email address or update your password on this page.

Click Save to keep your changes.
My Training
Go here to complete any required trainings. Click “Start Curriculum” to begin. **Note:** Available curriculum will depend on the participation category selected for the account. To change, go to Edit Profile then save any updates.

Click the gray arrow bar to navigate available trainings under *Optional Training Curriculums*.

Trainings include videos, questions, and policy acknowledgments. Watch videos all the way to the end—when videos are completely finished, the page will show as Done and automatically progress to the next segment.

If you need to pause the video you are watching, click the middle of the video or the bottom left hand side of the video.
My Training (continued)

After a background check request is submitted, the curriculum will remain marked as "In Progress" until the results are processed and reviewed.

Once a background check has been processed, the account will either be auto-certified or the diocese will review the profile information and continue to process the certification.

If a current email address is associated with an account, the individual will receive a system message when the entire process is complete. Please allow 7-10 business days for the background check and certification status processing.

After a background check has been reviewed and approved, an individual can log back in to their CMG Connect account to access a completion certificate. SECs will also be able to verify completion of trainings on individual profiles.

Click “Download Certificate” under the to view and download the completion certificate.
For account access or technical questions, please direct individuals to cmgconnect@catholicmutual.org

If you have any additional questions or need further assistance with your SEC administrative account on CMG Connect, please contact:

**Shannon Ronhovde**  
Loss Control Rep I  
sronhovde@catholicmutual.org  
800.228.6108 ext. 2397

For questions specific to the requirements, policies, and/or guidelines of the Diocese of Steubenville, please contact:

**Dcn. Paul Ward**
Frequently Asked Questions (FAQs)

What can I enter for my username and password?
When creating an account, select a unique username and password that you will remember. If the username you select has been chosen by someone else, you will be asked to select a new one. If you had an account in the previous system, you already HAVE an account. Login with the same username and password.

The site says my username is already registered, but I am new to the training.
Your username might already be in use or you may already have an account on the system. All the accounts from the old system were transferred. Click the username/password recovery at the top of the page. You should contact your Safe Environment Coordinator or the Diocese if the username/password recovery does not find your account.

Can I register if I share an email account with someone else?
Yes. Ensure that your usernames are unique. An email is not required, but is highly recommended due to the automatic recertification alerts you will get.

Can I register if I don’t have an email account?
Yes. An email is not required, but is highly recommended due to the automatic recertification alerts you will get. The system does have a system inbox, so you can login to get any messages or alerts.

I have a new email address, should I register again?
No. You need to log in using your original account information and edit your profile.

My role within my parish/school has changed. Where can I update that information?
You will log into your account and edit your profile.

How do I keep in touch with my users?
When checking user account information, verify their personal information is up to date. This includes their address, phone number, and their participation category. Also confirm that the email address on the user's account is accurate and current. Email correspondence is the core of a successful online tracking program.

How often do I need to check my user list?
At a minimum, check the platform weekly to assess certifications and expirations. Keeping your user list up to date on a regular basis will help you remain in compliance as well as run clean and accurate reports.
User Tab: Search & Sort Features

We've added more robust options for you to search and filter users at your location within the Users tab on CMG Connect. We've added a search field for Maiden Name as well as filter selections for Certification Status and sorting by USCCB Role.

[Image of search and sort features]

In addition to the refined search options, you can also sort your user lists alphabetically by First Name, Last Name, Username, or USCCB Role. Simply click the heading at the top of the list. A small arrow icon will appear to show if the sort order is ascending or descending.

Notes

The second new feature is the User Note section in the view area (eyeball). You will now be able to add notes to a user account that diocese admins and site admins can see.

This will be completed by clicking the little edit icon in the right corner of the User Notes area, fill out the form, click Create.

You will have the ability to include one note on the Export Builder report which can be designated on the form. If you select Export for multiple notes the system will default to the most recent note entered.

[Image of user note feature]

This feature will allow you to store additional information about the user – end users will not see any notes entered on their account.