

CMGConnect

Diocese of St Cloud — Safe Environment Program *Site Administrator Guide*

Welcome to CMG Connect!

This guide is your first step to preparing yourself as a resource for the individuals at your site(s) who will be completing training. Review this document when you are beginning your role as a new administrator 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.

Access CMG Connect at your custom link:
<https://StCloud.CMGConnect.org>



Note: Internet Explorer 11 is NOT supported at this time. Please use Google Chrome, FireFox, Microsoft Edge, or Apple Safari.



Questions? Contact us at
cmgconnect@catholicmutual.org

Last Updated: 07/11/2023

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.

Certification (Status): (*below, left*) **certification status** signifies whether or not a user has completed the components

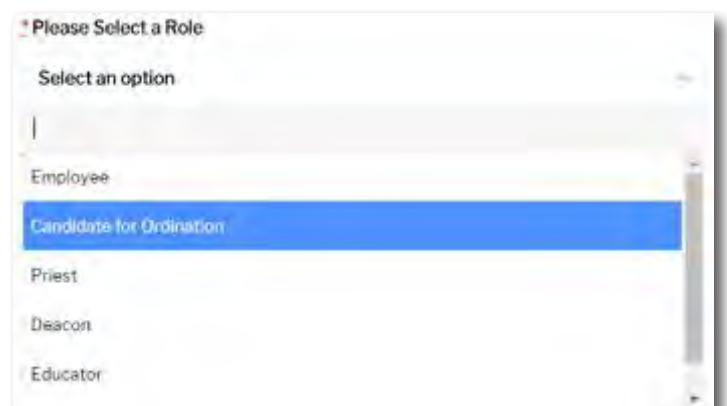


Yes

required by your organization for Safe Environment compliance: training (online or live), acknowledgment of policies, and a current background check/screening.

USCCB Role: (*below, right*) Referred to simply as "Role" at account registration, users select from these 6 major categories:

Employee; Candidate for Ordination (Seminarist or Deacon Candidate); Priest; Deacon; Educator (Catholic School Teacher or Principal ONLY); and Volunteer. These are used by the United States Conference of Catholic Bishops to define individuals who are Safe Environment certified.



General Information: Certification Status Definitions

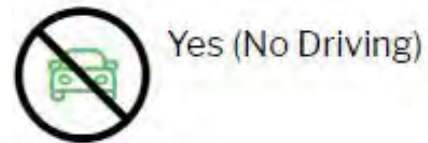
User has met all Safe Environment requirements for the Diocese.
(Training + Background Screening/Fingerprint)



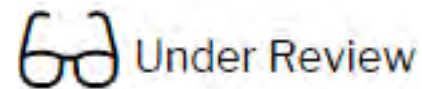
User has met all Vulnerable Adults requirements for the Diocese.
(Training + Background Screening)



User has met all Safe Environment requirements for the Diocese, but is **NOT** permitted to drive children and/or vulnerable adults.



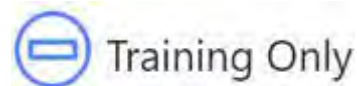
User's profile is currently under review
(Ex: User is missing training, background check had hits that are under review by the Diocese, etc.).



User has completed the background check but has not finished the training.



User completed Safe Environment training, but has NOT fulfilled background check requirement.
Check Notes on the entry for more information.



User is **NOT** approved to work with children and/or vulnerable adults.



User's training and/or background check is expired. *Accuracy of dates will vary based on data entry by Diocese Admin.*



General Information: Responsibilities

As a Site Administrator for the Diocese 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).

Site Administrator Responsibilities

- If needed, complete Safe Environment curriculum (including background check submission) via the CMG Connect training platform. Log in with your Site Admin account at <https://stcloud.cmgconnect.org>.
- Ensure that communication is sent to users who are nearing expiration for background checks and/or safe environment certification
- Manage user profiles and assist end users with questions

Diocese Admin Responsibilities

- Review background checks via the CMG Connect dashboard
- Assign Certification Statuses to users after reviewing background checks and confirming completion of training requirements
- Assist Safe Environment Site Administrators with learning and utilizing CMG Connect as well as addressing direct questions from end users

The Diocese requires safe environment training, policy acknowledgement, and background check submission every **5 years**.

Full Training includes online *Safe Haven - It's Up to You* videos & questions, Diocese policy acknowledgement, and background check submission.

End-users will be notified via email (and system inbox) 60 days before their Certification Status expiration date for recertification.

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

CONTACT INFORMATION

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

Linda Kaiser (Director)


lkaiser@gw.stcdio.org
320.251.2340

Bailey Ziegler (Tech Support)

bziegler@gw.stcdio.org
320.258.7655

Or visit the Diocese Safe Environment web page for more details:

<http://stcdio.org/safe-environment/>

For questions about your administrative account OR if you have end-users who need help with account access and technical questions, please submit a ticket via the  Support button on the website, or contact our customer support number: (833) 993-1667

CMG CONNECT SUPPORT HOURS:

Monday-Thursday

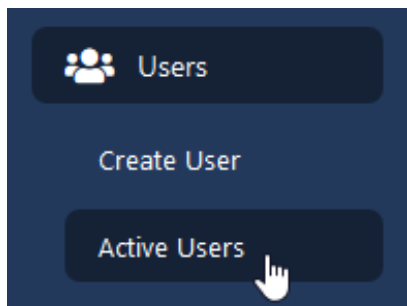
6:30AM – 5:00PM (CST)

Friday

6:30AM – 12:00PM (CST)

Our team will respond to support requests received outside of regular hours as quickly as possible on the following business day. Thank you for your patience and understanding!

Users Menu: Active Users



1. On the left side of your screen click the **"Users"** menu
2. Click **Active Users** from the list
3. A blue **Search Users** button is located on the right side of the page. Click to view your search and filter criteria options.
4. To include users who are NOT primary users at your selected location in your search results, select the **Search Full Diocese** check box.
5. To include users who have been inactivated in your search results, select the **Include Archived Users** check box
6. Click **Apply** to view your search results

A light blue header with 'Users' and 'Home / Users'. On the right are 'Search Users' (blue) and 'Add User' (dark blue) buttons. Below is a 'Search Users' section with input fields for Last Name, First Name, Maiden Name, Username, Email, and Phone. There are also dropdowns for USCCB, Certification Status, and Site. At the bottom, there are checkboxes for 'Include Archived Users' and 'Search Full Diocese' (checked), and an 'Apply' button circled in green next to a 'Clear' link.

Users

Home / Users

Search Users

Last Name First Name Maiden Name Username Email Phone

USCCB Certification Status Site

Select a Role Select a Status Select a Site

☐ Include Archived Users ☒ Search Full Diocese Apply Clear

Viewing Search Results

Search results will show any users in the diocese who meet your search criteria.

- If you select the **Include Archived Users** check box, those results will be highlighted in red, as shown in the sample screenshot below.
- If you select the **Search Full Diocese** check box, you will have limited "Action" options for users who are not primary at your location (outlined in **blue** below).

A table with 8 columns: First name, Last name, Username, USCCB Role, Certification Status, Certification Date, BG Check Date, and Actions. The second row is highlighted in red. The 'Actions' column has a dropdown menu with 'View' and 'Favorite' options, which is outlined in blue. A large 'SAMPLE' watermark is overlaid on the table.

Users

Home / Users

Search Users Add User Export

First name	Last name	Username	USCCB Role	Certification Status	Certification Date	BG Check Date	Actions
Test_Phoenix1	Test_Phoenix1	test_phoenix1	Volunteer	Approved	07/09/2019	07/09/2019	
Test_Phoenix2	Test_Phoenix2	test_phoenix2	Employee	No	12/01/2019	Not on File	
test_phoenix24	test_phoenix24	test_phoenix24	Volunteer			Not on File	

< Prev 1 Next >

View Favorite

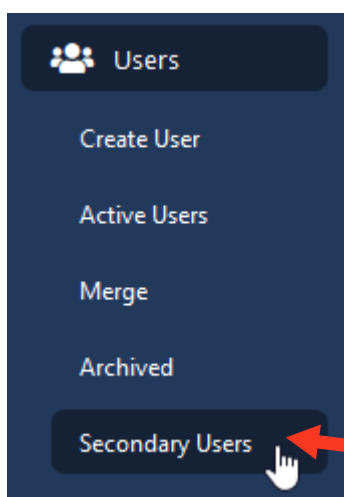
Viewing Search Results (continued)

The columns included with the User List and search results allow you to view a user's certification status at a quick glance. The individual's current status, certification date, and background check date are summarized for your convenience (outlined in **green**).

First name	Last name	Username	USCCB Role	Certification Status	Certification Date	BG Check Date	Actions
Test_Phoenix1	Test_Phoenix1	test_phoenix1	Volunteer	Approved	07/09/2019	07/09/2019	
Test_Phoenix2	Test_Phoenix2	test_phoenix2	Employee	No	12/01/2019	Not on File	
test_phoenix24	test_phoenix24	test_phoenix24	Volunteer			Not on File	

Please contact CMG Connect support if you need to recover an archived user who is not primary at your location.

Users Menu: Secondary Users



The Secondary User List allows you to add users from throughout the arch/diocese who are not primary at your location to a “watch list” for easy access. The list is specific to your site administrator account.

To add an account to your Secondary User List:

- 1) Make sure to select the *Search Full Diocese* check box for your search
- 2) Click the action menu button (see **black arrow** in the image above)
- 3) Select the “Favorite” option with the yellow star icon

Any accounts that you mark as a “Favorite” will be added to your personal Secondary User List. To access the full list, click Users on the left side of your screen then choose **Secondary Users** from the menu.

To REMOVE an account from this list, repeat the same steps as above. Step 3 will now show the option “Remove From Secondary List” for the user.

Users Tab: Active Users

Search Users & Export Features

The screenshot shows the 'Users' tab interface. On the left is a dark blue sidebar with navigation links: 'My Trainings', 'Users', 'Create User', 'Active Users' (highlighted with a red circle), 'Archived', 'Secondary Users', 'Curriculum', 'Resources', and 'Live Events'. The main content area is titled 'Users' and 'Home / Users'. At the top right, there are three buttons: 'Search Users' (blue, circled in red), 'Add User' (dark blue), and 'Export' (yellow, circled in red). Below these is a 'Search Users' section with various input fields: 'Last Name', 'First Name', 'Middle Name', 'Maiden Name', 'Username', 'Email', 'Phone', 'Address 1', 'USCCB', 'Certification Status', 'DOB' (with year, month, and day dropdowns), and 'Site'. At the bottom of the search section, there are two checkboxes: 'Include Archived Users' and 'Search Full Diocese', both circled in red. To the right of these checkboxes are 'Apply' and 'Clear' buttons.

Use any of our variety of search criteria to look up user accounts. Mix and match how you use the different fields to filter your results to the specific user or user groups you want to view:

- Last, First, Middle, or Maiden Name
- Username
- Email address (*must be entered as "@___.com"*)
- Phone Number
- Address
- Certification Status
- USCCB Role
- Date of Birth

You are also able to include archived/inactive users and users throughout the entire Arch/Diocese by selecting the check box(es) before clicking "Apply" to run your search.

The screenshot shows a 'Report Download' screen. At the top, it says 'Report Download'. Below that, a message states: 'Our computers are working diligently to pull together the information you requested. The progress bar will reflect status of preparing your report. Once our computers have completed compiling the data, a download link will appear below and you will be sent a link to download the file at...'. A progress bar is shown with '100%' indicated. Below the progress bar, it says 'Your Report is Ready'. A message follows: 'Thank you for your patience while we compiled the results. Please click the link below to download the file.' At the bottom, there is a blue button labeled 'Download Report', which is circled in red.

Clicking the Export button will pull your user list into an Excel .csv spreadsheet. Once it downloads you will have the ability to open this report and view. If your email is in the system you will also receive a message and a download link.

Note: This report will pull first name, middle name, last name, username, email, USCCB role, parish name, parish city, certification status, certification date, background check date, background check type, when the account was created, and the last user login.

Users Tab: Active Users

View Users

The "View" page allows you to see a user's overall account activity and training history.

- 1) Click the **Users** tab on the left side of your screen
- 2) Select **Active Users** from the list. *If needed, use the "Search" tool to locate a specific user.*
- 3) When you have located the user you want to view, select the "Actions" menu arrow
- 4) Select **View** from the drop-down

First name	Last name	Username	USCCB Role	Certification Status	Certification Date	BG Check Date	Actions
Malorie	Adamson	madamson	Employee	Yes	08/08/2019	07/17/2019	
Gretchen	Anderson	AndersonGretchenE	Employee	Yes	09/18/2019	01/04/2020	View
Nick	Anderson	nicka02511	Employee	Yes	08/15/2019	08/09/2	Edit
Samantha	Anderson	sanderson	Employee	Approved	08/30/2019	12/06/2	Archive
Kim	Awadallah	kawadallah	Volunteer	Yes	11/25/2019	11/22/2019	

The User Profile page is split into demographic information at the top and all training data, background check/fingerprint records, imported training, and notes at the bottom.

SEC Sioux Falls (CMG)

Home / Users / User Details

[Edit User](#) [Users List](#)

SEC Sioux Falls (CMG)

Status: Active

First Name	SEC	Diocese	Sioux Falls	DL State
Middle Name		Site	Central Office/Bishop O'Gorman Catholic Schools - Sioux Falls	DL Number
Last Name	Sioux Falls (CMG)	USCCB Role	Other: Not incl in Audit	Categories
DOB	09/01/1927	Username	SEC_siouxfalls	Department
Email		System Role	site_admin	SR
Phone		Language	en	Yes
		Location	Sioux Falls, SD	

Account Created: 09/15/2019 07:25:43 Account Updated: 08/20/2019 11:08:10 Last Login: 08/20/2019 11:08:10

Certification Statuses

Certification Statuses:

Status	Completed At	Entered By	Notes
There are no certification statuses.			

Background Checks

Completed Training List

User Events

Imported Trainings

Imported Live Trainings

User Notes

Associated Sites

Secondary Users

In addition to the demographic information on the account, the top section of this page also displays when the account was created, updated, and the last login.

You can toggle between the **Edit** and **View** pages at the top of the page if their account is listed as a primary user at your location.

SEC SiouxFalls (CMG)

Home / Users / User Details

SEC SiouxFalls (CMG)
Status: *Active*

First Name	SEC	Diocese	Sioux Falls	DL State	
Middle Name		Site	Central Office/Bishop O'Gorman Catholic Schools - Sioux Falls	DL Number	
Last Name	SiouxFalls (CMG)	USCCB Role	Other: Not Incl in Audit	Categories	Employee - Pastoral Disposition
DOB	09/01/1927	Username	SEC_siouxfalls	Department	
Email		System Role	site_admin	SIR	Yes
Phone		Language	en		
		Location	AL...		

Account Created: 09/01/2018 17:27 - Account Updated: 03/03/2020 17:29 - Last Login: 03/03/2020 17:29 (07)

Support

The bottom half of the User Profile will allow you to click on each of the areas to see certification status, background check dates, training information, historical training, user notes, associated sites and what secondary user lists that this individual is on.

Note: You will only see the Associated Sites area if the user is also a site administrator.

Certification Statuses (1)

- Background Checks (0)
- Connect Trainings (0)
- Live Events (0)
- Imported Trainings (0)
- Imported Live Trainings (0)
- User Notes (0)
- Associated Sites (2)
- Secondary Lists (0)

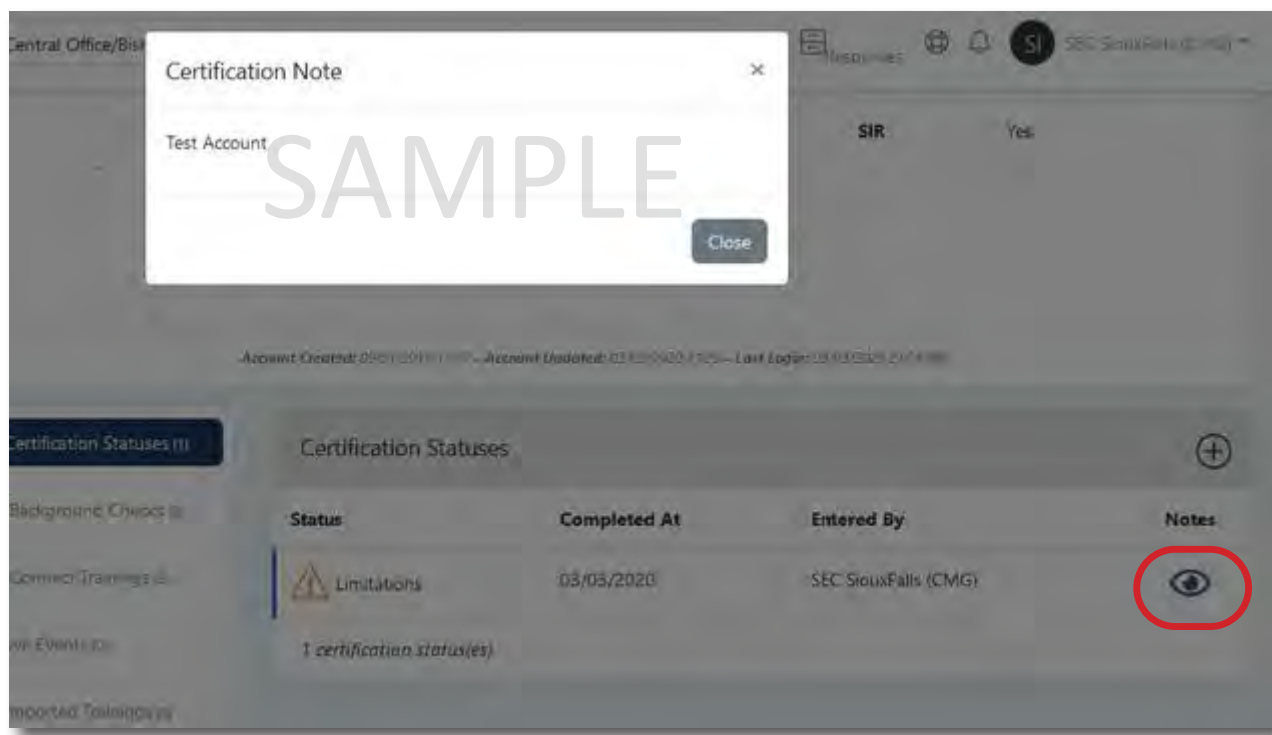
Certification Statuses

Status	Completed At	Entered By	Notes
Limitations	03/03/2020	SEC SiouxFalls (CMG)	

1 certification status(es)

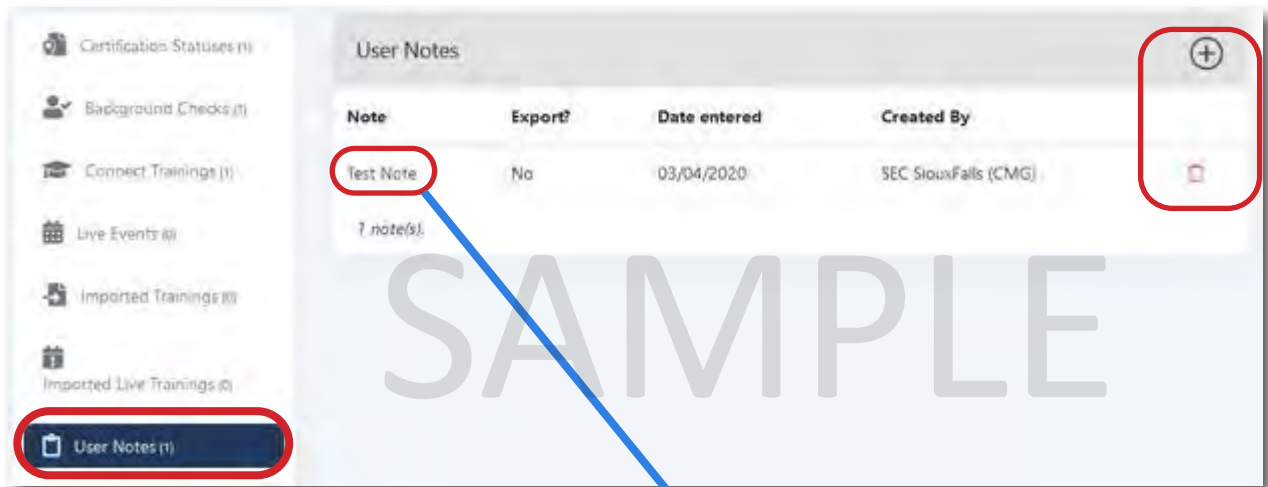
If there is an eyeball icon under the "Notes" section of an entry, click to view any notes that have been entered by an administrator regarding the record.

If you have questions about a Certification Status or need clarification on a user's Safe Environment clearance, please contact the arch/diocesan office for assistance.

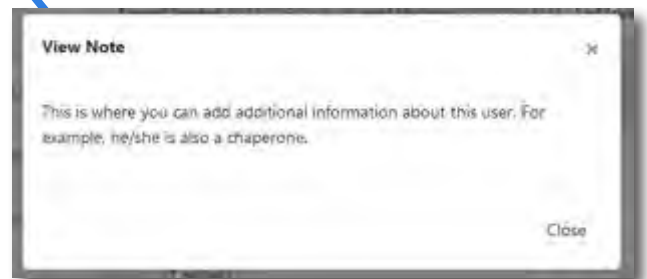


From the **Connect Trainings** section of the page, you can view records of completed and/or started curriculums. If a user has completed a training, you have the ability to print certificates and view the responses to questions within that curriculum.





The **User Notes** area allows administrators to add information to a user's account for other administrators to view. **Be sure to include the Note Title when creating your entry as the title is what hyperlinks to view the note.**



These notes can be added/removed at any time. Please note that while users can have as many notes as needed, only ONE user note can be Exported via the Export Builder tool.

The **Secondary Lists** area show other locations (if any) that the user has been marked as a secondary list and which admin for that site starred their account. There may be several entries if the user is affiliated with multiple parishes or schools.



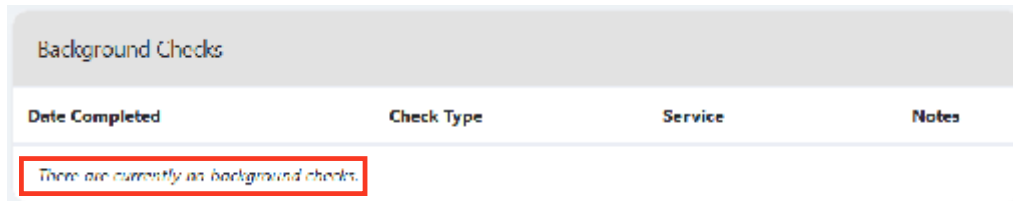
Users: Tips to Reading the Background Check Section

These tips will help you understand what to look for in the “Background Check” section to confirm if a user’s background check has been submitted successfully or if additional action(s) are needed.

- 1) Click the **Users** tab on the left side of your screen
- 2) Select **Active Users** from the list. *Use the “Search” tool to locate a specific user.*
- 3) Choose **View** from the “Actions” menu drop-down
- 4) Scroll down and click the **Background Checks** section

NO RECORDS: Background Check request has *NOT* been submitted for processing

If there are no background checks listed, *regardless of a user’s curriculum percentage*, it means the user did not complete the last step of actually submitting their background check details.



Background Checks			
Date Completed	Check Type	Service	Notes
There are currently no background checks.			

User Steps: 1) Log back in to their CMG Connect account, 2) Click “Resume” to return to the background check page within the curriculum, 3) Click “Submit Background Check Request” at the bottom of the page. A summary page will load confirming their submission attempt. *Processing can take up to 7-10 business days from the time of submission. The user’s curriculum will remain marked as “Resume” until the results are complete.*

BLANK RECORD: Background Check is *PENDING* submission (*Live Training* or *Payment*)

A blank record as shown below can mean different things depending on your organization’s settings.



Background Checks			
Date Completed	Check Type	Service	Notes
1 background check(s).			

If utilizing the Live Events feature: A blank record indicates that a user completed their full curriculum (including the background check submission form) but attendance has not yet been confirmed by an administrator.

User Steps: NONE. The user’s submission request will be sent for processing when an administrator confirms their RSVP via the Live Events function of CMG Connect.

If utilizing the Self-Pay feature: A blank record indicates that a user completed their full curriculum (including the background check submission form) but has not provided their payment information for the request to be processed.

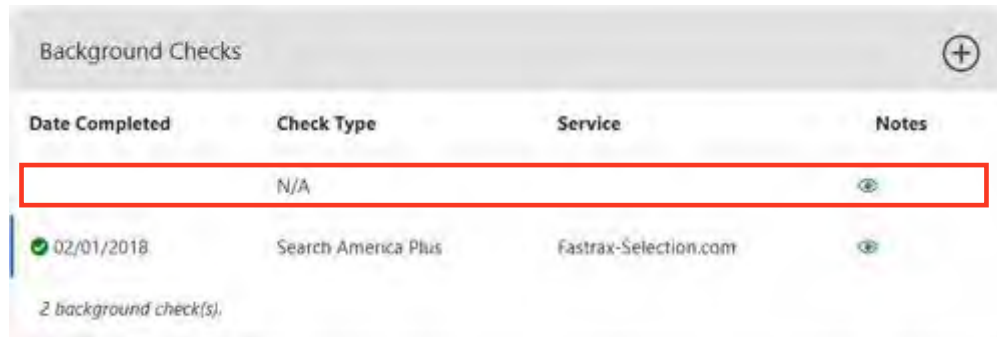
User Steps: 1) Log back in to their CMG Connect account, 2) Click “Resume” to return to the CC payment page 3) Enter Credit or Debit card information, 4) Click the blue “Pay” button. A summary page will load confirming their submission attempt. *Processing can take up to 7-10 business days from the time of submission. The user’s curriculum will remain marked as “Resume” until the results are complete.*

If NOT using Live Events or Self-Pay: A blank record indicates that a user completed their full curriculum (including the background check submission form) but their request may have encountered a technical error which has prevented it from being sent for processing.

Please contact CMG Connect Support for assistance.

"N/A" ENTRY: User's submission was blocked and is NOT processing

If a user completed their full curriculum with the integrated Background Check submission request but their profile already has an "Active" background check on file, CMG Connect will automatically block the request to help avoid unnecessary costs to your organization.



Date Completed	Check Type	Service	Notes
	N/A		
02/01/2018	Search America Plus	Fastrax-Selection.com	

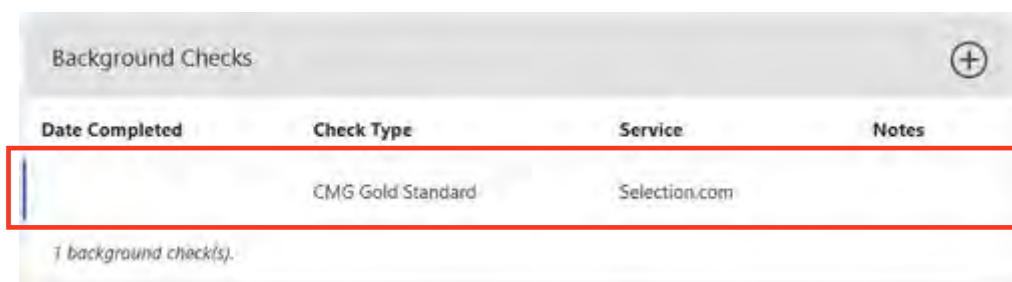
2 background check(s).

Please note that the **N/A** entry can also mean that the user had an invalid site/location selected at time of their submission or they were under 18 at time of submission. Click the eyeball icon (if visible) to view Notes about the entry or contact support for more information about why the request was stopped.

User Steps: NONE. However, **if the submission needs to be force submitted**, please contact CMG Connect Support or your Safe Environment administrator so the new request can be processed.

CMG GOLD STANDARD ENTRY (No Date): User's submission is SUCCESSFULLY processing

A CMG Gold Standard background type entry WITHOUT a Date Completed indicates that a user's submission request was successfully sent to Selection.com and is currently being processed.



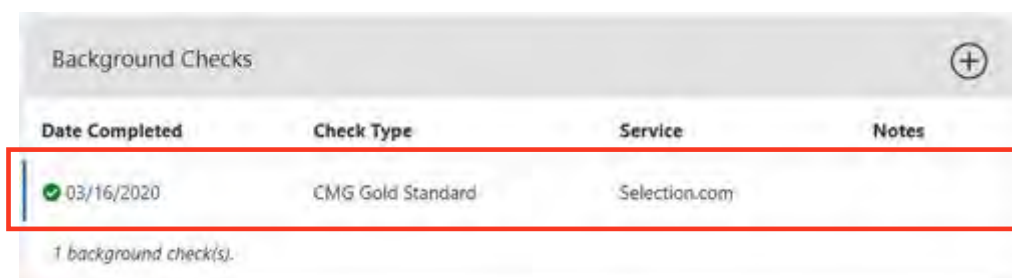
Date Completed	Check Type	Service	Notes
	CMG Gold Standard	Selection.com	

1 background check(s).

User Steps: NONE. Please note that processing can take up to 7-10 business days from the time of submission. The user's curriculum will remain marked as "Resume" until the report is processed. The record will update to 100% complete when the background check report is returned to CMG Connect.

CMG GOLD STANDARD ENTRY (WITH Date): User's background check is COMPLETE

The Date Completed column will automatically populate when the report results are returned to the CMG Connect platform. Results go to the *Awaiting Review* area of the background check administrator's dashboard so an appropriate Certification Status to be assigned to the account.





Date Completed	Check Type	Service	Notes
03/16/2020	CMG Gold Standard	Selection.com	

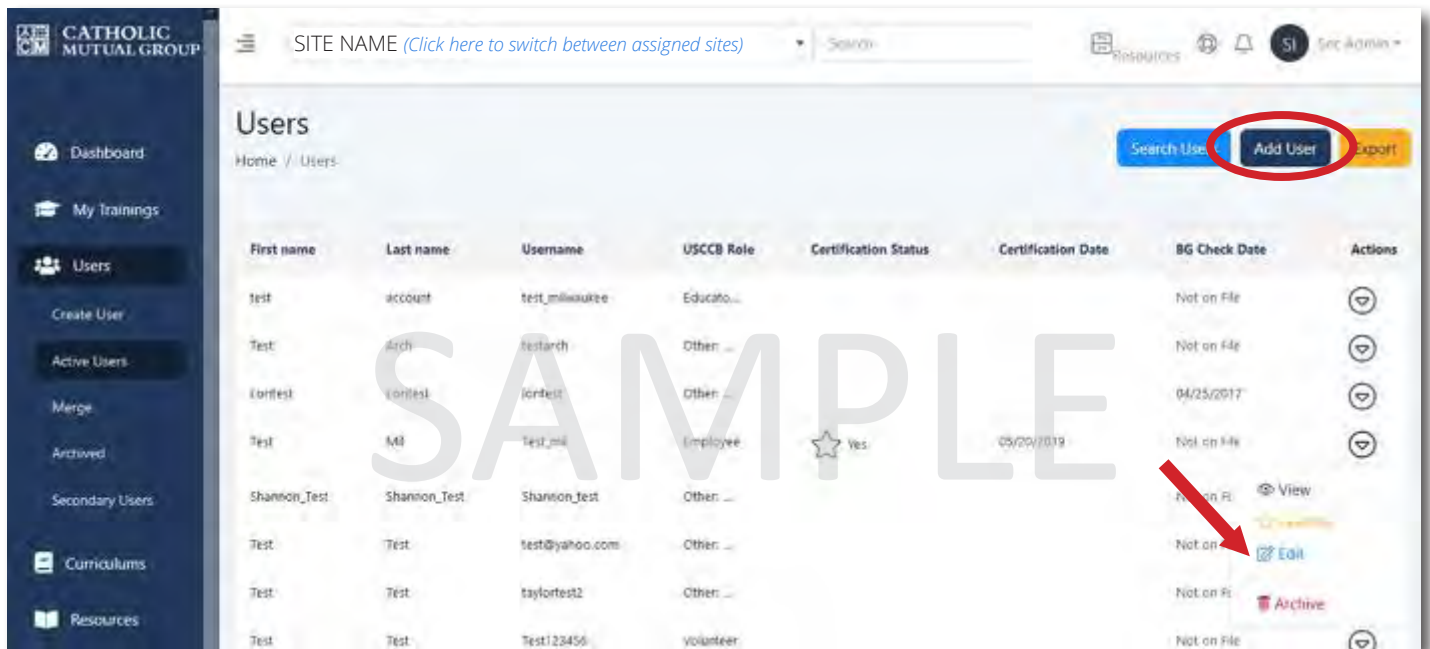
1 background check(s).

Users Tab: Edit Profile Details

Edit primary users demographic and password information.

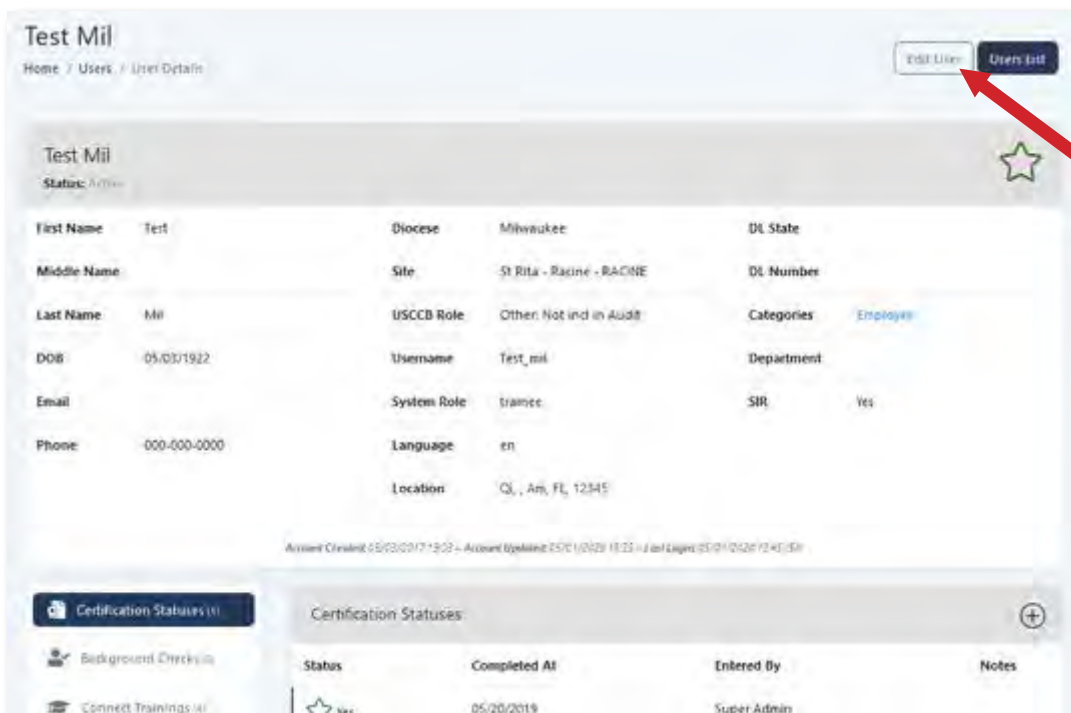
- 1) Click the **Users** tab on the left side of your screen
- 2) Select **Active Users** from the list. If needed, use the "Search" tool to locate a specific user.
- 3) When you have located the user you want to view, select the "Actions" menu arrow
- 4) Select **Edit** from the drop-down:  **Edit**
- 5) IF NEEDED, click  to create a new user account

A user's profile includes how they participate with their location. Please note these categories are subject to change per customization requests by your arch/diocese/organization.



The screenshot shows the 'Users' tab interface. On the left is a sidebar with navigation options: Dashboard, My Trainings, Users, Create User, Active Users, Merge, Archived, Secondary Users, Curriculums, and Resources. The main area displays a table of users with columns: First name, Last name, Username, USCCB Role, Certification Status, Certification Date, BG Check Date, and Actions. A red circle highlights the 'Add User' button in the top right. A red arrow points to the 'Edit' option in the Actions menu for a user.

First name	Last name	Username	USCCB Role	Certification Status	Certification Date	BG Check Date	Actions
test	account	test_milwaukee	Educatio...			Not on File	
Test	Arch	testarch	Other ...			Not on File	
loritest	loritest	loritest	Other ...			04/25/2017	
Test	MI	Test_mil	Employee	Yes	05/20/2019	Not on File	
Shannon_Test	Shannon_Test	Shannon_test	Other ...			Not on File	View
Test	Test	test@yahoo.com	Other ...			Not on File	Edit
Test	Test	tayloritest2	Other ...			Not on File	Archive
Test	Test	Test123456	volunteer			Not on File	



The screenshot shows the 'Edit User' page for 'Test Mil'. The page has a header with 'Test Mil' and 'Status: Active'. Below is a form with fields for First Name, Middle Name, Last Name, DOB, Email, Phone, Diocese, Site, USCCB Role, Username, System Role, Language, Location, DL State, DL Number, Categories, and Department. A red arrow points to the 'Edit User' button in the top right.

First Name	Middle Name	Last Name	DOB	Email	Phone	Diocese	Site	USCCB Role	Username	System Role	Language	Location	DL State	DL Number	Categories	Department
Test		Mil	05/03/1922		000-000-0000	Milwaukee	St Rita - Racine - RACINE	Other: Not ind in Audit	Test_mil	trainee	en	Q1, Am, FL, 12345			Employee	

Account Created: 05/03/2017 13:03 - Account Updated: 05/01/2020 18:25 - Last Login: 05/01/2020 12:45:50

Status	Completed All	Entered By	Notes
Yes	05/20/2019	Super Admin	

The Edit page can also be accessed via the **View** page of a user's account.

NOTE: You will only have access to Edit an account if the user is primary at your selected site.

Edit Account Details

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.

If creating a **NEW** account, you will need to fill in the address, city, state, and phone number fields for the profile to save successfully. If unknown, you can type in placeholder text such as a space or one of the following characters: . - : ; / *

Edit User
Home / Users / Edit

[View User](#) [Users List](#)

Personal information

First Name: *Include additional category/department notes for the user*

Last Name: Maiden/Other Name:

Department:

USCCB Role *:

DL State: DL Number: Language: *Change language settings*

Date of Birth:

Login and password information

Email:

Username *: ✓ *Edit the username or set a new password for the user*

Password:

Password Confirmation:

While recommended, emails are NOT required to have an account

Address 1 *: ✓

Address 2:

City *: ✓

State *:

Zipcode *: ✓

Phone *: ✓

Settings

☐ Safe environment coordinator

☐ Driving coordinator

☐ Schoolparish safety coordinator

☐ Read only

☒ Allow User to Submit Self Inspection Reports

Role:

Site:

Categories: *Select the description(s) that apply to how the user primarily works or volunteers at your location*

*Click **Update User** to keep changes. Look for a green "Success" ribbon at the top of the page to confirm that your edits saved.*

Toggle to the "View" page or return to the user list

Change language settings

Edit the username or set a new password for the user

While recommended, emails are NOT required to have an account

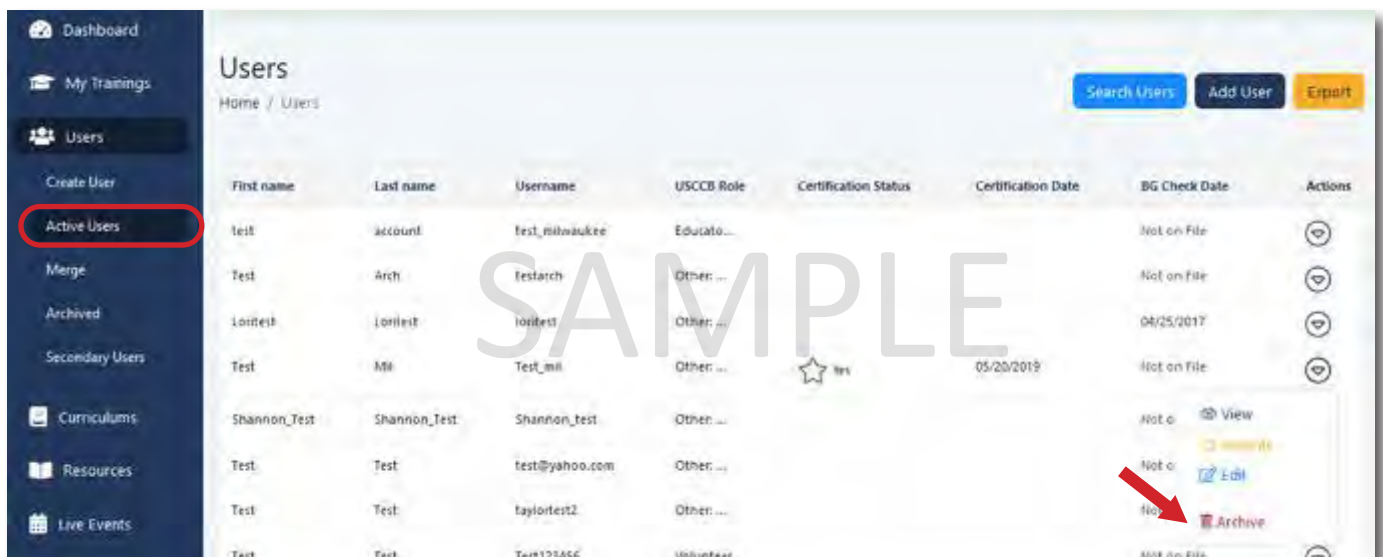
Select the description(s) that apply to how the user primarily works or volunteers at your location

*Click **Update User** to keep changes. Look for a green "Success" ribbon at the top of the page to confirm that your edits saved.*

Users Tab: Archived Users

If one of your primary users is no longer actively employed/volunteering at your site, you can Archive their profile to remove them from your Active Users list. Archived users can be recovered, if needed.

*Note that a user cannot access their account while their profile is in an Archived state. Training records are **NOT** removed from the user's profile when Archived.*



Recovering Archived Users

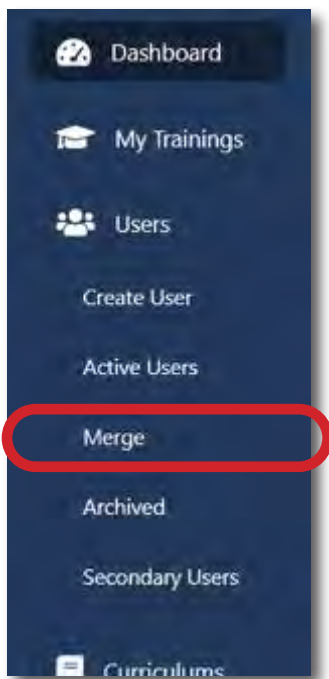
- 1) Click the **Users** tab on the left side of your screen
- 2) Select **Archived** from the list. *If needed, use the "Search" tool to locate a specific user.*
- 3) When you have located the account that you want to Restore, select the "Actions" menu arrow.
- 4) Click **View** to confirm the account details match the correct individual.
- 5) Click **Restore** to move the account back to your Active User list

Note: You will only be able to restore users that were archived at your location. Please contact CMG Connect Support to restore users from other locations.



From the **Archives** page, you can also Export a report a list of all Archived users at your location. Results will download in a CSV file format that can be opened in Excel.

Users Tab: Merge



How to Merge Users

If you have a user who accidentally creates a duplicate account, you can consolidate their profiles into one using the Merge tool.

- 1) Click the **Users** tab on the left side of your screen
- 2) Select **Merge** from the list.

Combining duplicate accounts takes three steps:

- 1) Choose the Primary and Duplicate User Accounts
- 2) Search and Select Users to Merge
- 3) Merge Accounts

NOTE: You will only be able to merge users who's accounts are both primary at your site.

If the duplicate is registered under a different location, please contact CMG Connect Support or your Safe Environment administrator to combine the accounts for you.

Step 1: Choose the Primary and Duplicate User Accounts

Pick one of the user's accounts to be the primary user and the other as the duplicate user. Typically, selecting the account with the most recent "Last Login" date as the primary account will result in the most accurate merged profile.

You will only be able to merge two profiles if both accounts are primary users at your site. All CMG & Imported Training records on file will be retained in the merge process. However, **ONLY the personal information (address/contact info/etc.) for the account selected as primary will be kept.** Details on the profile of the "Duplicate User" will be overwritten.

Please verify that the multiple profiles are definitely the same person before proceeding.
Once two profiles are merged, the action cannot be undone.

A screenshot of a web form titled "Merge Duplicate Users". Below the title is a breadcrumb trail: "Home / Merge Duplicate Users". The form is divided into two main sections: "Primary User" and "Duplicate user". Each section contains three input fields: "Username", "Last Name", and "First Name". Below these fields in each section is a "Search" button. The input fields have placeholder text: "Username", "Last name", and "First name".

Step 2: 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.

Primary User

Username: Last Name: First Name: Search

Duplicate user

Username: Last Name: First Name: Search

Primary User Search Result

Name	Name	Diocese	Site	Username	Role	Last Login	Select
Mil	Test	Milwaukee	W Alk / RACINE / RACINE	TestMil	trainee	03/13/2020 14:19	

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

Primary User

Last Name: First Name: Diocese: Username: Role: Last Login: Select Again

Mil Test Milwaukee Test_mil trainee 03/13/2020 14:19

Duplicate user

Username: Last Name: First Name: Search

Click the plus icon to select the duplicate user. Once both accounts are selected, double-check to make sure you have chosen the correct account as the Primary so the right profile details will be retained. If you select the wrong account, click **Select Again** and repeat the process as needed.

Primary User

Last Name	First Name	Diocese	Username	Role	Last Login
Mil	Test	Milwaukee	Test_mil	trainee	03/13/2020 14:19

Select Again

Duplicate user

Last Name	First Name	Diocese	Username	Role	Last Login
Mil	Test	Milwaukee	Test_mil	trainee	03/13/2020 14:19

Select Again

Merge Users

Step 3: 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 belong to the same individual and need to be merged.

Reports Tab

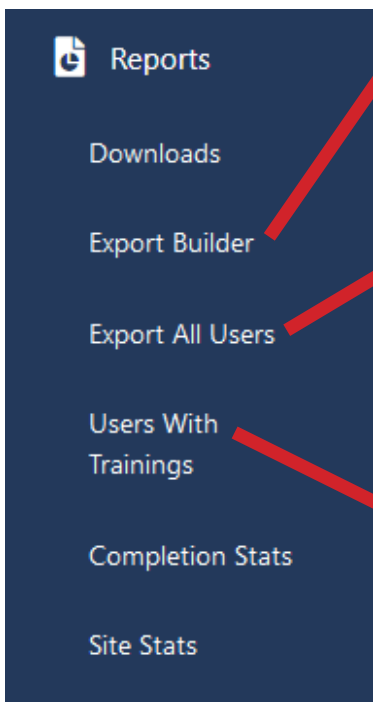
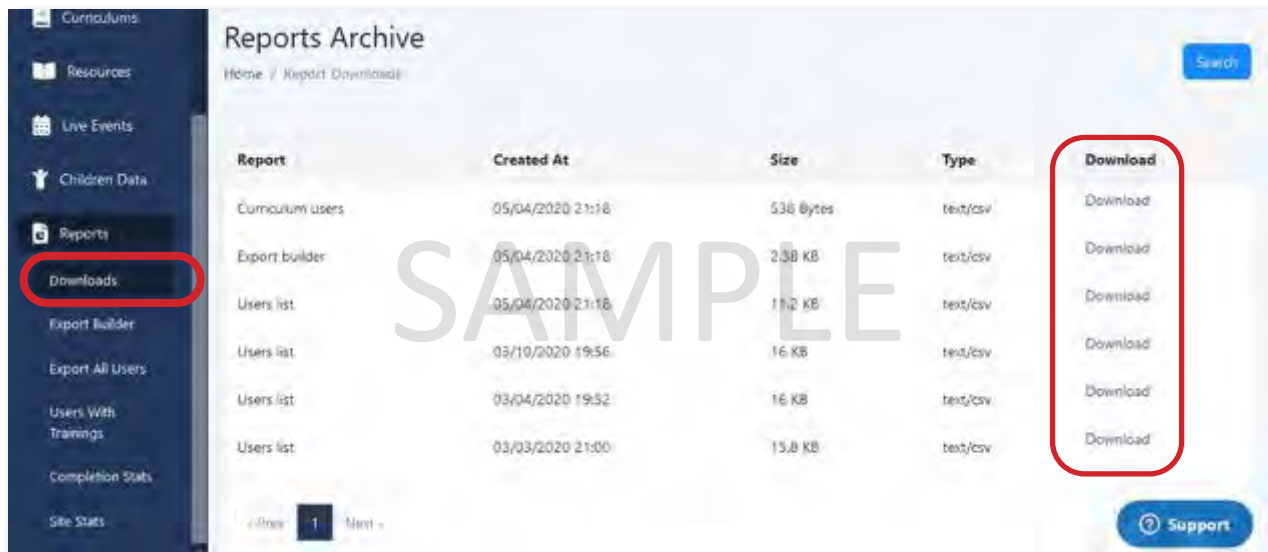
CMG Connect offers many different options to pull data from the platform. All reports will download in Excel .CSV format, which does not retain formatting. Make sure to "Save As" an Excel file type if you wish to work with a spreadsheet outside of the system and save any changes.

PLEASE NOTE: Edits made to downloaded reports will NOT be reflected in CMG Connect.
Once a report is downloaded, the results are not linked with the platform.

Downloads

The Downloads page lists previous reports that you have downloaded from your administrative account on the platform. Click the **Download** hyperlink to re-download report results.

Note: Clicking "Download" on this page will NOT download real time/updated data from the platform. A new report should be run if you need current data.



Export Builder

The Export Builder tool allows admins to custom select their query details to run reports. Additional instructions for this feature are covered more in-depth in the **Reports - Export Builder** guide.

Export All Users

This will run a full report for your location (if site admin) or for the entire organization (if global admin). Columns in the report include basic user information, certification status, background check information, last sign-in and when the account was created.

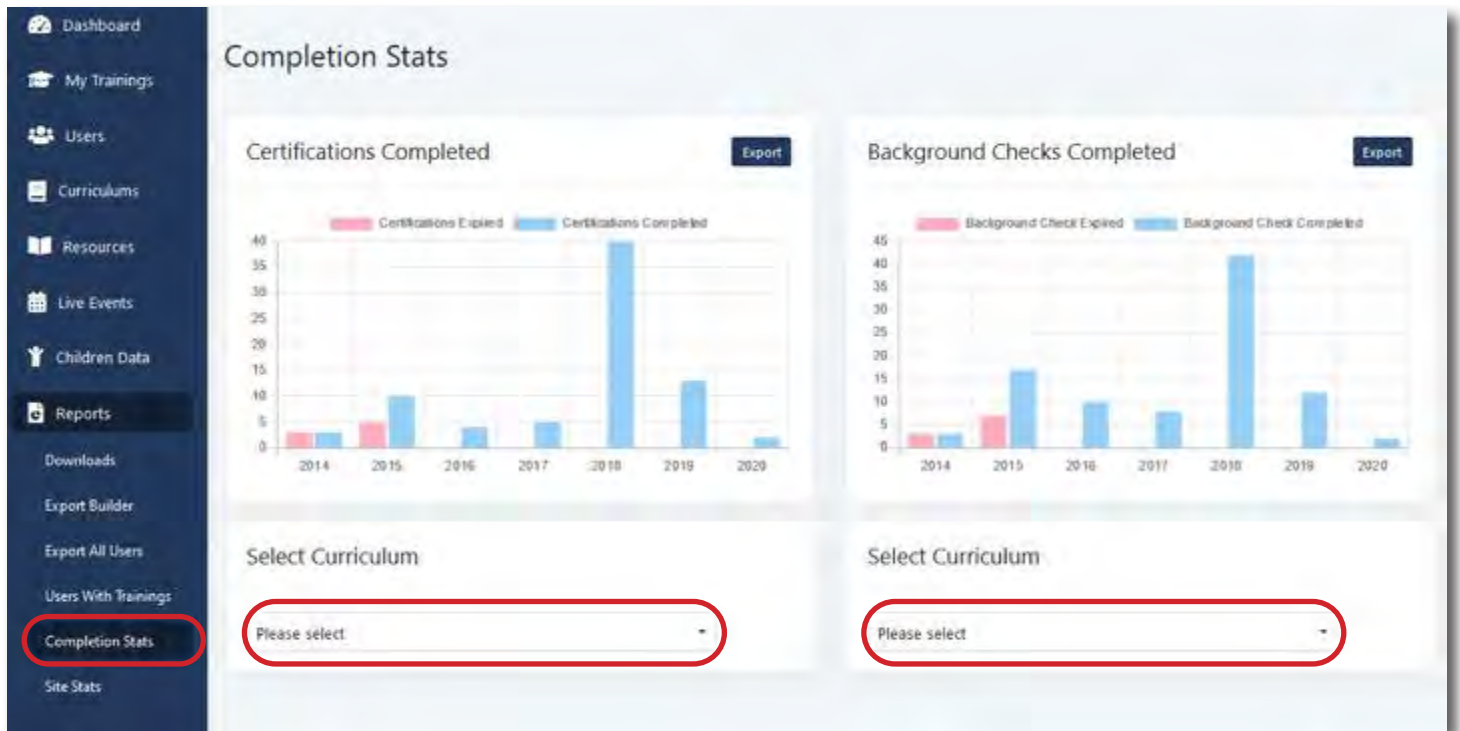
Users With Trainings

This will run a report for all active users with your location (if site admin) or for the entire organization (if global admin) and the trainings each person has completed. Columns in this report include basic user information, certification status, background check information, and every curriculum that is active on your platform.

Completion Stats

This page allows you to view graphs for your location of Year-over-Year (YoY) completion numbers for Certifications and Background Checks.

You can also select a specific curriculum under the "Select Curriculum" area to view graphs of individual training modules. Use the second "Select Curriculum" area to compare two graphs.

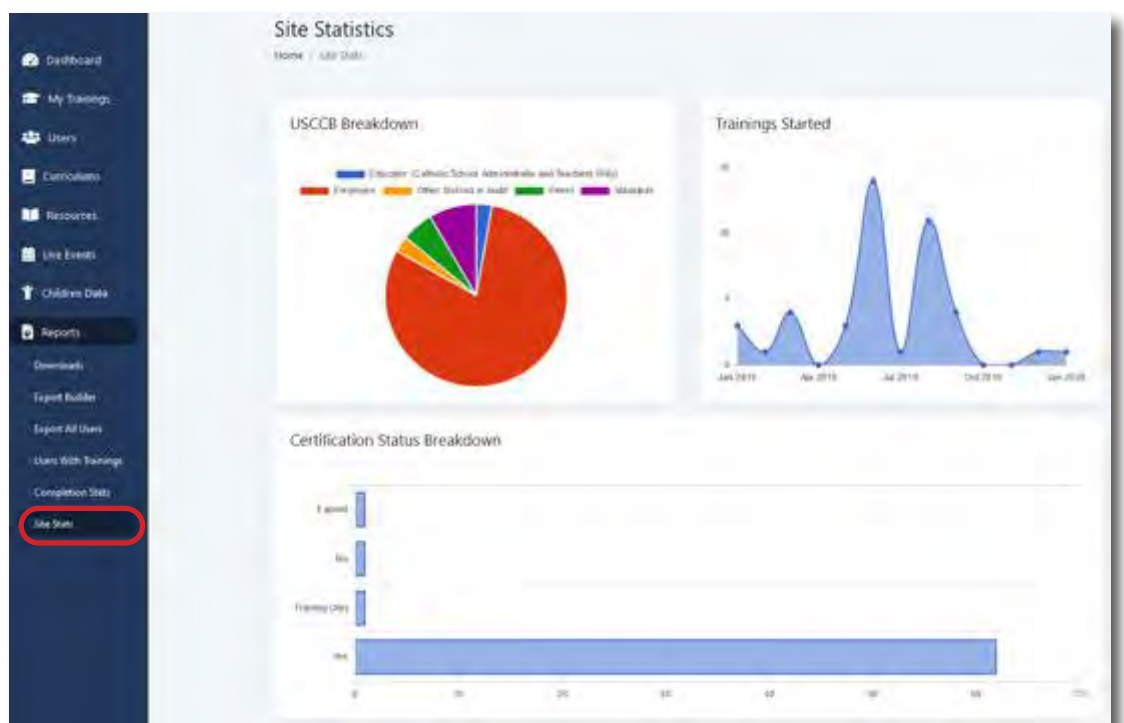


Site Stats

View general statistics for your selected location, including the breakdown of USCCB Roles and Certification Statuses among your users.

Hover over data points on each visual for summary information.

Interact with the USCCB chart by clicking a category to view the updated visual breakdown.



Last Updated: Last Updated: 07/11/2023

Reports Tab: 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.



Downloads

Shows the history of all the reports that you have downloaded.

Export Builder

Allows you to select what specific information you want to include in a report to view in an Excel file.

Export All Users

Will export all users affiliated with your site. Includes their certification status and background check date/type.

NOTE: These report may take several minutes depending on the amount of data you are reviewing.

Select Users Data

<input type="checkbox"/> First Name	<input type="checkbox"/> Middle Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Maiden/Other Name
<input type="checkbox"/> Address 1	<input type="checkbox"/> Address 2	<input type="checkbox"/> City	<input type="checkbox"/> Zip Code
<input type="checkbox"/> Phone	<input type="checkbox"/> Categories	<input type="checkbox"/> Certification Status	
<input type="checkbox"/> Site Name	<input type="checkbox"/> BG Check type	<input type="checkbox"/> BG Check Date	<input type="checkbox"/> Date Of Birth
<input type="checkbox"/> Certification Date	<input type="checkbox"/> Note		
<input type="checkbox"/> Department			

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

Select Users Curriculums

<input type="checkbox"/> 1. School Safety Coordinator Program Requirements 2017/2018	<input type="checkbox"/> 1. School Safety Coordinator Program Requirements 2018/2019
<input type="checkbox"/> A Safe Haven Starts at Home	<input type="checkbox"/> A Safe Haven Starts at Home
<input type="checkbox"/> A Safe Haven Starts at Home	
<input type="checkbox"/> A. Safe Environment Program	
<input type="checkbox"/> A. Safe Haven - It's Up to You - Segment 1 - Lincoln	<input type="checkbox"/> A. Entrenamiento en Ambiente Seguro (Safe Environment) - Lincoln
<input type="checkbox"/> A. Entrenamiento en Ambiente Seguro y Verificación de Antecedentes (Safe Environment) - Lincoln	<input type="checkbox"/> A. Safe Environment Training & Background Check - Lincoln

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

<input type="checkbox"/> CM Be Smart Drive Safe (HTML5)	<input type="checkbox"/> CM Be Smart Drive Safe (Spanish)(HTML5)
<input type="checkbox"/> CM Bloodborne Pathogens	<input type="checkbox"/> CM Spanish Transportation (HTML5)
<input type="checkbox"/> CM Passenger Van Policy	<input type="checkbox"/> CM School Safety 101
<input type="checkbox"/> Smarter Adults-Safer Children: Technology Safety and Security	

This area allows you to include any training that was uploaded as historical data.

Select Users Live Trainings

<input type="checkbox"/> Be Smart - Drive Safe (incl. q...
--

This area allows you to include any live trainings that were part of historical data.

Select Background Checks

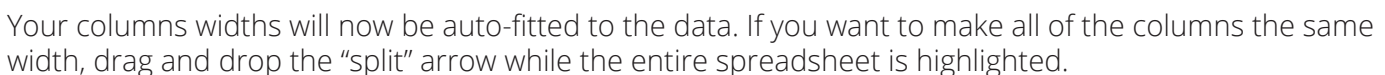
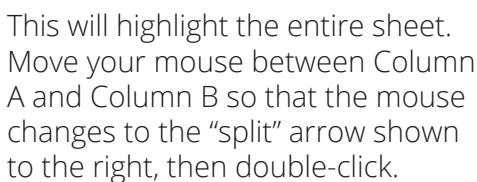
<input type="checkbox"/> CMG Gold Standard
<input type="checkbox"/> Export

This area allows you to further specify a background check type and/or dates of previous background checks.

If you have questions about any part of this process,
please contact CMG Connect Support

Last Updated: Last Updated: 07/11/2023

When you open the downloaded file, your Excel will look like the screenshot below. To expand column widths to view the full contents of each cell, click the gray arrow to the left of Column A and above Row 1 (circled).

23

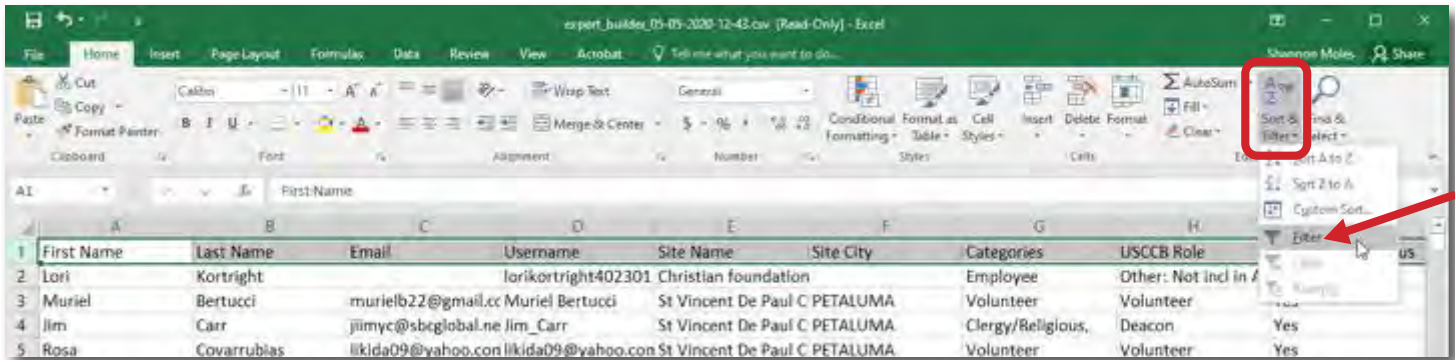
Filtering by Category/Column

One of the most helpful tools for working with reports in Excel is the **Filter**. This tool allows you to manipulate what information you view based on the contents under each column heading.

	A	B	C	D	E
1	First Name	Last Name	Email	Username	Site Name
2	Lori	Kortright		lorikortright402301	Christian fo
3	Muriel	Bertucci	murielb22@gmail.co	Muriel Bertucci	St Vincent t
4	Jim	Carr	jimyc@sbcglobal.net	Jim Carr	St Vincent t
5	Rosa	Covarrubias	likida09@yahoo.com	likida09@yahoo.com	St Vincent t
6	Bernadette	Crnich	b.crnich@comcast.net	b.crnich@comcast.net	St Vincent t
7	Donna	Dillena	dwdillena@yahoo.com	DonnaDillena	St Vincent t
8	Fallie	Dundley	undleyfallie57@earthlink.net	undleyfallie57@earthlink.net	St Vincent t

To apply a filter:

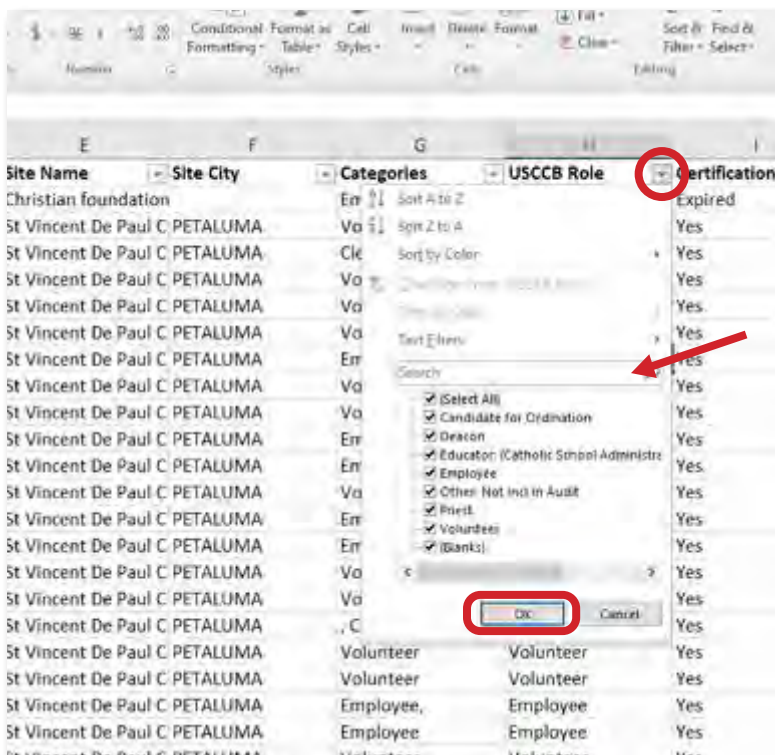
- 1) Select Row 1 of the spreadsheet by clicking the "1" on the far left. This will highlight the entire top row of the spreadsheet in gray as shown above.
- 2) After Row 1 is highlighted, locate the **Sort & Filter** button at the top right of your Excel window.
- 3) While your row is still highlighted, select **Filter** from the drop-down menu.



This will apply small drop-down arrows to each column headings.

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.

	A	B	C	D	E
1	First Name	Last Name	Email	Username	Site Name
2	Lori	Kortright		lorikortright402301	Christian fo
3	Muriel	Bertucci	murielb22@gmail.co	Muriel Bertucci	St Vincent t
4	Jim	Carr	jimyc@sbcglobal.net	Jim Carr	St Vincent t
5	Rosa	Covarrubias	likida09@yahoo.com	likida09@yahoo.com	St Vincent t
6	Bernadette	Crnich	b.crnich@comcast.net	b.crnich@comcast.net	St Vincent t



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* field. The list below begins to shorten as you type. When only the category you want is selected, click **OK**. You can also manually select (or deselect) certain check boxes to filter the report view.

Using the filter tool changes the view to ONLY records matching your specific criteria (check boxes) marked.

TO CLEAR A FILTER FOR ONE COLUMN:

- 1) Click the menu button on the heading.
- 2) Select **Clear Filter from "[heading]"** to unfilter the selected column.

TO CLEAR ALL FILTERS ON YOUR REPORT:

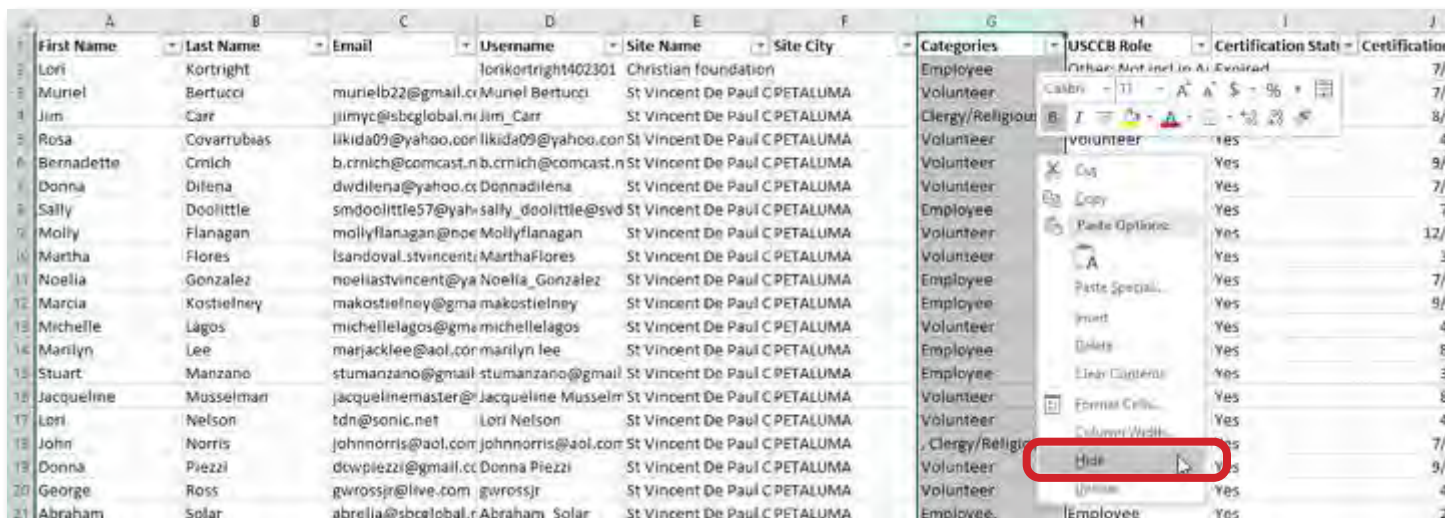
- 1) Click **Sort & Filter** at the top of the page
- 2) Click **Clear** to view the full spreadsheet

“Hide” Unneeded Columns

If you pull 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 sample below, we will hide the **Categories** column (Column E).

To hide a column:

- 1) Highlight the column you want to Hide from your view by clicking the letter above the heading
- 2) Right click on the highlighted column
- 3) Select **Hide** from the menu that appears



To view the hidden “Categories” column again later, highlight the surrounding columns (D and F in this example) then follow the same process but select “Unhide” instead of “Hide”.

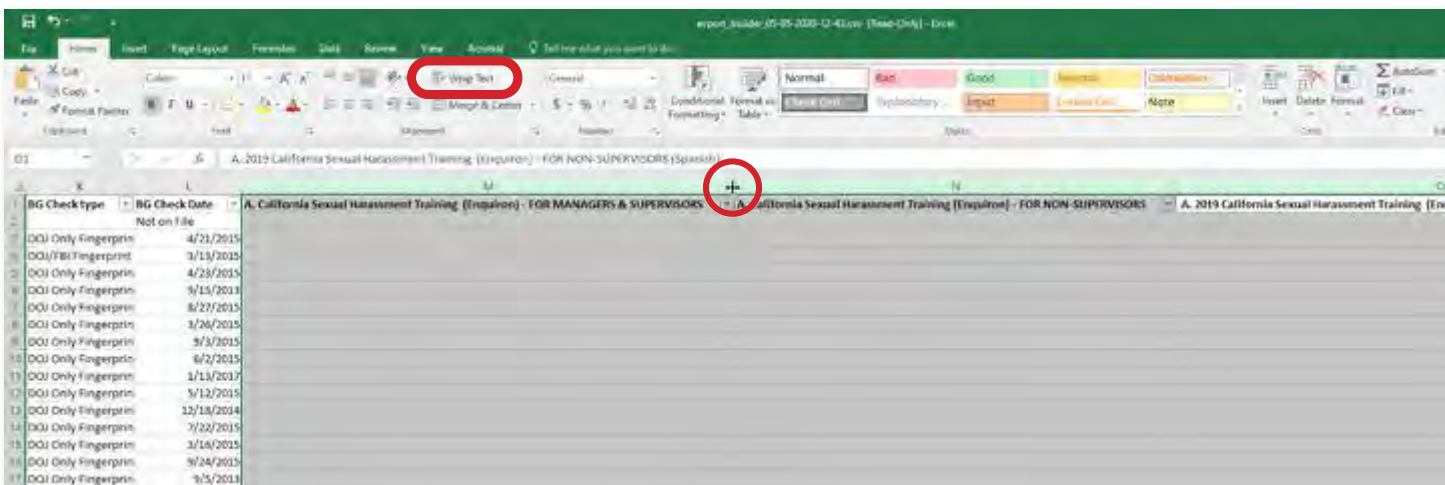
Formatting Column Width

It is sometimes easier to manage data when all columns are the same width. This helps limit the amount that you have to scroll to the right in the spreadsheet to view all of the data.

To change the width multiple columns at once:

- 1) Highlight the columns you want to update. (To highlight multiple columns, click the letter above a column and drag in either direction to select adjacent columns. Ex: Columns F, G, and H in the screenshot below).
- 2) Move your mouse between the highlighted columns so the “split” arrow icon appears again.
- 3) Click and drag to adjust to your desired width.

Narrowing your column widths may cut off the words in the top row (headings). If you would like to be able to see the full title/contents of a column, you can click “Wrap Text” while you still have the columns selected.



Sorting by Location: Diocese-level Report

For easier review of a full report, you can sort the list alphabetically by location to organize users.

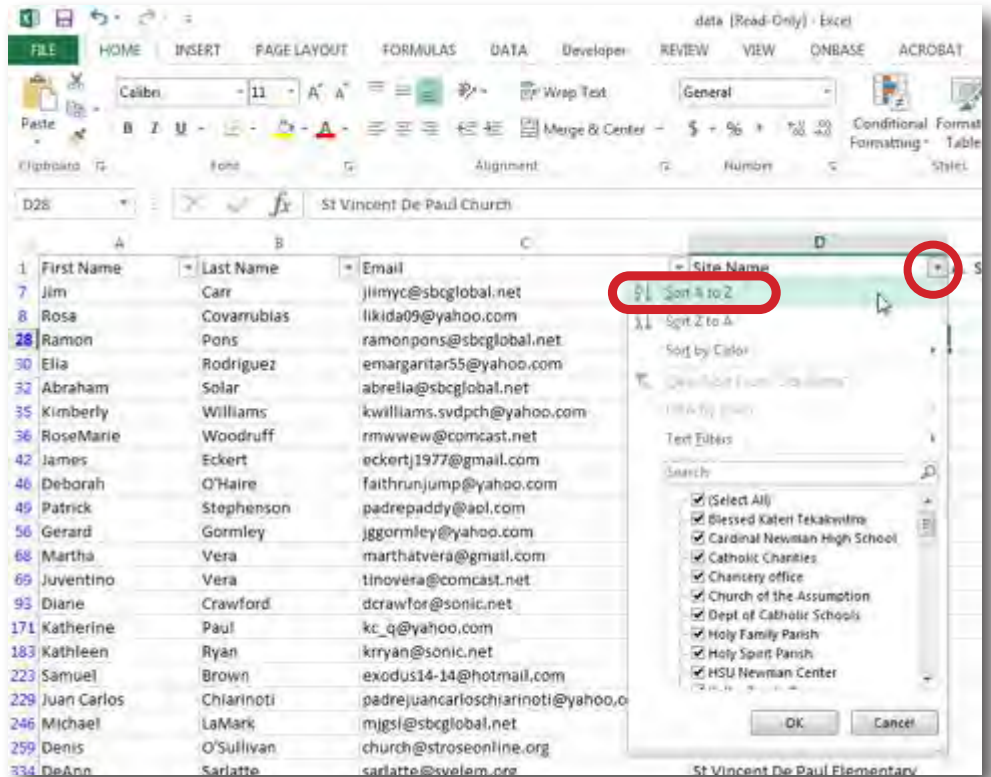
To Sort a Column:

1) Click the drop-down arrow for the column.

(In this example, you would select the arrow for the **Site Name** column.)

2) Select **Sort A to Z** to organize the column alphabetically.

Note: In order to have the option to sort by Site Name/Site City, you must select those on the Export Builder when initially selecting the criteria for your report.



Reviewing Training Records


The dates under each training column (curriculum title) heading reflect when the user completed the curriculum on CMG Connect. Please keep in mind that results from the Export Builder include both percentages of in-progress trainings AND completion dates of finished records.

When reviewing if an individual has completed training, you can look up their name (either using Ctrl + F or using the Filter tool in the name columns) then look under the column of specific headings to see if there is a completion date. You can also filter by completion date for each curriculum/column. This process can be done within CMG Connect via "View Curriculum" page as well.

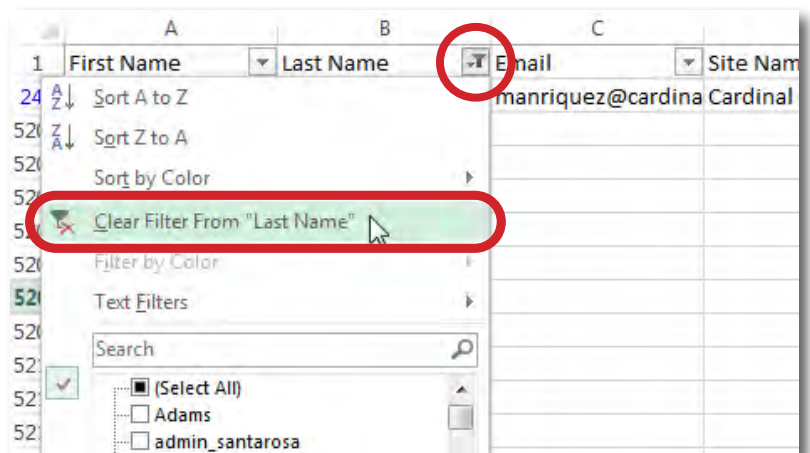
The sample below is filtered by the last name of Sample "User". Following their details to the right, we can see that account completed the curriculum listed in Column J on **1/9/2020**.

	A	B	C	D	J	K
1	First Name	Last Name	Username	Site Name	A. California Sexual Harassment Trainin	A. California Sexual Harassment
2	Sample	User	SampleUser	St Mary's Sample	1/9/2020	

TO REMOVE AN APPLIED FILTER:

1) Click the  menu button on the heading.

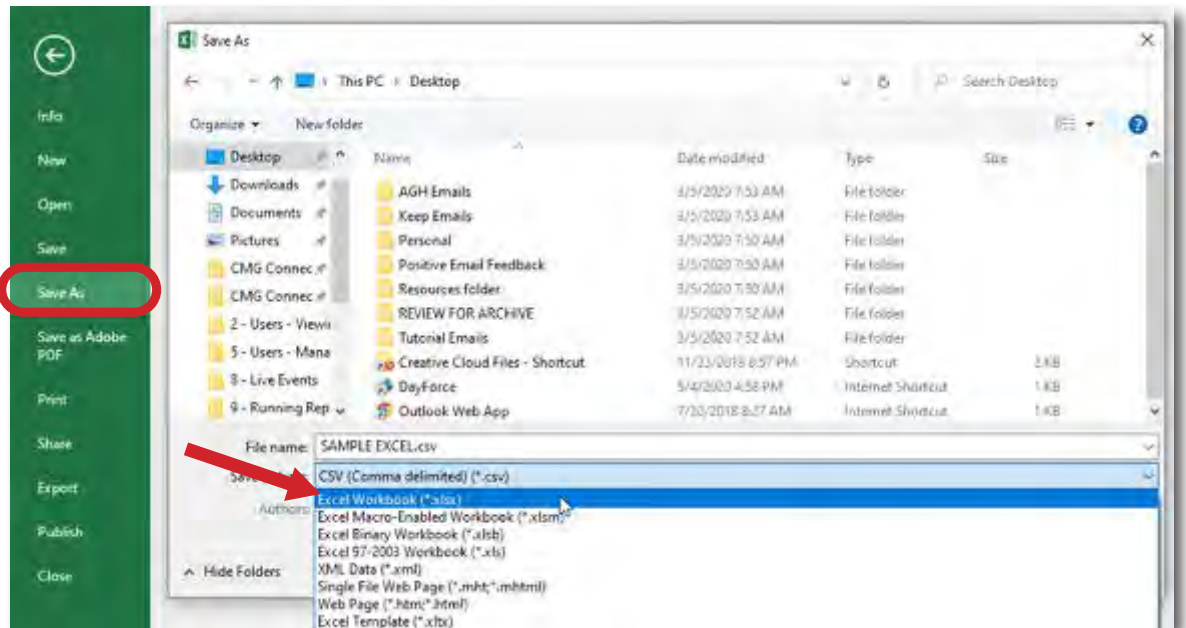
2) Select **Clear Filter from "[heading]"** to unfilter the data in the selected column.



Saving the Report

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

- 1) Click **File** in the upper left corner
- 2) Select **Save As** from the menu options on the left side of the screen
- 3) Choose where you want the file to be saved. (You may need to click "Browse" to find a specific file location.)
- 4) If needed, edit the **File Name** field
- 5) Click the drop-down list for **Save as type** and select 'Excel Workbook' from the list
- 6) Click **Save**



Printing the Report

For best printing/viewing results, you may want to change your print settings.

To print your report:

- 1) Click **File** in the upper left corner
- 2) Select **Print** from the menu options on the left side of the screen

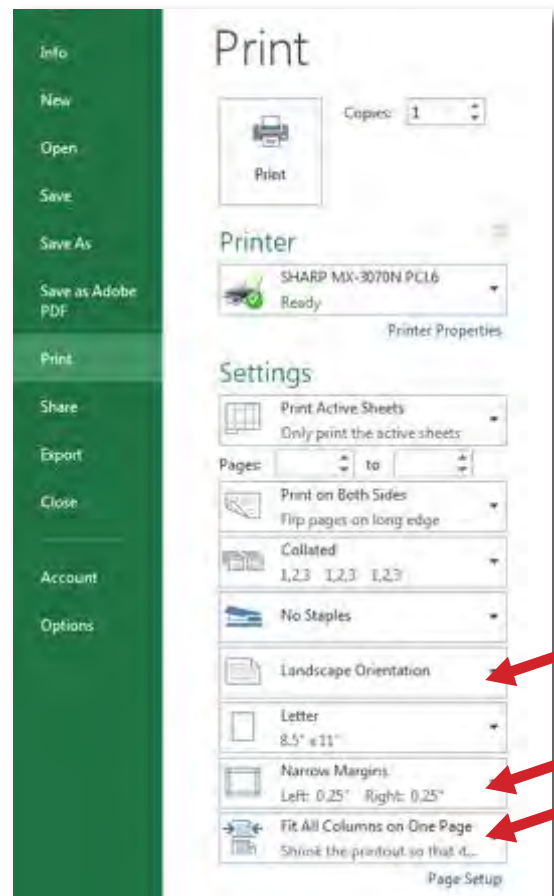
Other Tips for Print Settings:

Change the page orientation to **Landscape Orientation** to fit more columns on the printed page.

Set **Narrow Margins** to allow your data to print closer to the edge of the page and attempt to fit more columns.

Under the last option for scaling, select **Fit All Columns on One Page**. Excel will automatically shrink the view of your data to fit all columns on a single page.

Other scaling options may better suit your needs to make sure the print is still a readable size once printed.



Children's Training Data

You can input children's training numbers in CMG Connect. From this feature, you can Search existing records, Add new data, pull a Training Data Report, or Export all entries for your location.



Click **Add** to enter training numbers.

Fill in all fields then click **Save Training Data**. The newly saved record can be viewed by returning to the Children Data page.

Trainer	Program name	Grade range	# Trained	# Opted Out	# Absent	
Cardwell	Circle of Grace	K-8	270	0	17	👁️
lyn Andrews	Circle of Grace	8	29	0		👁️
Manasse	Circle of Grace	5	21	0		👁️
hanie Fidler	Circle of Grace	6	35	0	0	👁️
A. Bazz	Circle of Grace	7	35	0	0	👁️

Once created, you will have the option **View** or **Edit** the entry.

Please contact CMG Connect Support if you need a record to be Deleted.

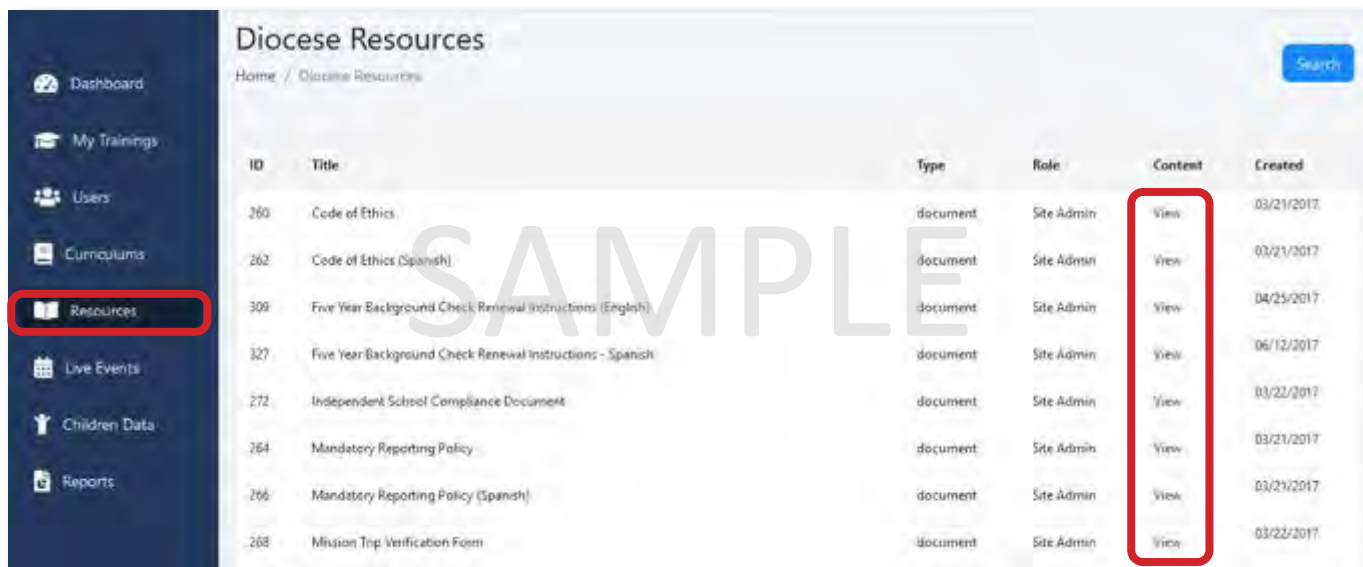
A **Training Data Report** for each location if desired. Select the desired date range and program then click **Generate Report**. The resulting page can be printed if signatures are required.

Resources: Administrative & End Users

Various resources for your organization can be stored privately for administrators only or publicly to be available for all end-users, as with the Catholic Mutual CARES Resource Library.

Resources Tab: Administrators

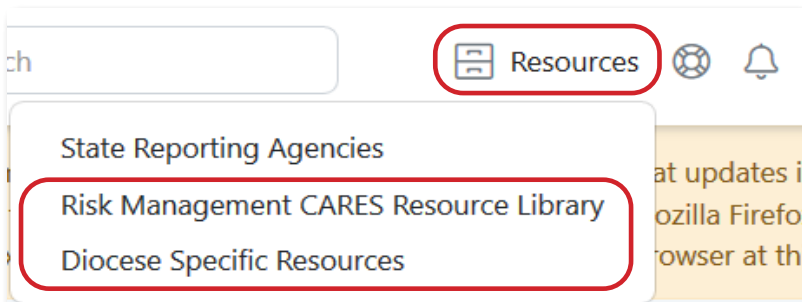
The resource area can be used to store administrative guides, specific forms your organization uses, children's training lesson plans, etc. We will store your administrative guides in this area for easy access. Click to **View** to open the document or URL in another window.



ID	Title	Type	Role	Content	Created
260	Code of Ethics	document	Site Admin	View	03/21/2017
262	Code of Ethics (Spanish)	document	Site Admin	View	03/21/2017
309	Five Year Background Check Renewal Instructions (English)	document	Site Admin	View	04/25/2017
327	Five Year Background Check Renewal Instructions - Spanish	document	Site Admin	View	06/12/2017
272	Independent School Compliance Document	document	Site Admin	View	03/22/2017
264	Mandatory Reporting Policy	document	Site Admin	View	03/21/2017
266	Mandatory Reporting Policy (Spanish)	document	Site Admin	View	03/21/2017
268	Mission Trip Verification Form	document	Site Admin	View	03/22/2017

Resources: End Users

At the top of all accounts is another resource area for your specific policies and documents, as well as full access to the Risk Management CARES Resource Library. The State Reporting Agencies feature is also listed.



Using the “Search Library” button, users can look up documents by name or keywords to easily navigate Catholic Mutual’s full library of best-practice documents.

