A PROGRAM AND SERVICE OF
THE NATIONAL CATHOLIC RISK RETENTION GROUP, INC.

VIRTUS®*Online*

Local Safe Environment Administrator Guide

VIRTUS®
Excellence
Builds
Trust

Log in to your VIRTUS account at www.virtus.org to review the functionalities of the VIRTUS Platform.

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To inquire about your specific access, communicate with your Diocesan Safe Environment Coordinator.

How do I view and edit my own location(s) accounts for the employees and volunteers who have online registrations within VIRTUS Online?

1. Select the "Administration" tab from the tabs at the top of the page:

    a. New User Signups – indicates that the online training has been completed, in progress, or assigned or in person training scheduled attendance.

    b. Users – indicates the list of users within the coordinators location(s)

    c. User Search – Ability to search the entire database within the Diocese to search for an individual.
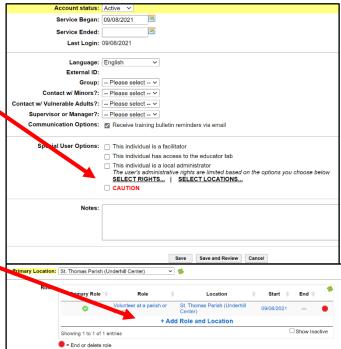
2. The employees and volunteers for your affiliated location(s) will be listed in alphabetical order by last name. You can also search in the Search box for individual users, then select "User Search". Click on the 'Show inactive users' to determine if an account is in an inactive status.

    a. If the user is listed within your location(s), you will have the ability to edit information within the General Tab, such as User ID, Name, Email, Location and Role, and then select 'Save' or 'Save and Review'.

    b. If a **CAUTION** appears in the Special User Options, please contact the Diocesan Safe Environment Office to determine the issue. The issue may appear in the Notes section.

    c. The Primary Location should be selected within the box. To update Location and Role, click on **Add Role and Location** and select Role, Location and Start Date (if unknown, put the date you enter the update) and **Save.** To inactivate a Role/Location, click on the red stop sign to inactivate or delete if it is an incorrect selection. The green check signifies the primary role. To edit, **Click** on the designated Role, Location or Date.

    d. The ability does exist to add additional locations/roles to the user's record. If you fully inactivate your location from a user's record, you can no longer edit the record.

How do I assist with recovering an individual's username or password as a Local Safe Environment Administrator?

1. The Local Safe Environment Administrator may assist with recovering the username/password only for accounts that already exist.

   First, search the database to find the online account by reviewing the instructions listed within this document under the section entitled, *"How do I search the entire organization to view if a particular individual has an online registration, make changes to their account and/or affiliate them with my location?"*

2. Once the account is located, click on the last name to pull up the profile information.

   a. If the Local Safe Environment Administrator shares the same "Primary" or "Additional" location as the individual, then the administrator can ask the system to send the individual his/her user ID and password.

      i. First, check that the email listed within the account is accurate

      ii. If the email is not accurate, then the administrator should update the email address and select "Save and Review" at the bottom of the page.

      iii. Once the email is updated and correct, select "Email account info," and ask the individual to retrieve the message from their email account and proceed accordingly. If not found, please ask the individual to check their spam folder.

   b. Need login information is always accessible at https://www.virtus.org to recover one's username and/or password.

How do I review an account to view background check dates, required document dates, and review training?

1. In order to review an account's main profile page, the Safe Environment Administrator must first search for the user and click on the person's name to open up the profile. Once a user is selected, an "active" user will have all of the following tabs associated within the account.

   The Background Check dates will appear within the **Background Check Tab**. A background check prompt feature is available if a user is in need of a background check.
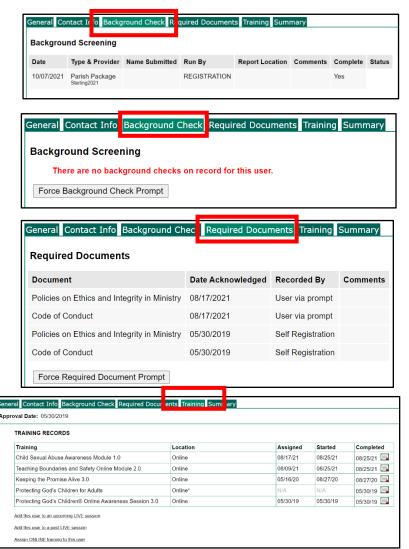
   The Required Documents dates that are electronically acknowledged will appear within the **Required Documents Tab**, and the ability exists to Prompt a document for a user to log in and acknowledge.
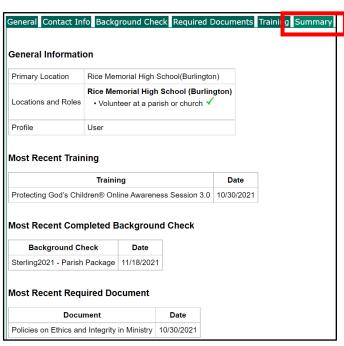
   The training information will appear within the **Training Tab,** and the ability exists to print the training certificate by clicking on the certificate icon.

| General | Contact Info | **Background Check** | Required Documents | Training | Summary |

Background Screening

Date	Type & Provider	Name Submitted	Run By	Report Location	Comments	Complete	Status
10/07/2021	Parish Package Sterling2021		REGISTRATION			Yes	

| General | Contact Info | **Background Check** | Required Documents | Training | Summary |

Background Screening

There are no background checks on record for this user.

Force Background Check Prompt

| General | Contact Info | Background Check | **Required Documents** | Training | Summary |

Required Documents

Document	Date Acknowledged	Recorded By	Comments
Policies on Ethics and Integrity in Ministry	08/17/2021	User via prompt	
Code of Conduct	08/17/2021	User via prompt	
Policies on Ethics and Integrity in Ministry	05/30/2019	Self Registration	
Code of Conduct	05/30/2019	Self Registration	

Force Required Document Prompt

| General | Contact Info | Background Check | Required Documents | **Training** | Summary |

Approval Date: 05/30/2019

TRAINING RECORDS

Training	Location	Assigned	Started	Completed
Child Sexual Abuse Awareness Module 1.0	Online	08/17/21	08/25/21	08/25/21
Teaching Boundaries and Safety Online Module 2.0	Online	08/09/21	08/25/21	08/25/21
Keeping the Promise Alive 3.0	Online	05/16/20	08/27/20	08/27/20
Protecting God's Children for Adults	Online*	N/A	N/A	05/30/19
Protecting God's Children® Online Awareness Session 3.0	Online	05/30/19	05/30/19	05/30/19

Add this user to an upcoming LIVE session

Add this user to a past LIVE session

Assign ONLINE training to this user

To review a summary of the compliance items, please click on the **Summary Tab**.

If you see a **CAUTION** notification on a users account, please contact the Diocesan Safe Environment Coordinator for additional information.

Please note: For educator and non-educators of the Catholic Schools, current VCIC dates are being added to the background check tab by the Office of Catholic Schools.

| General | Contact Info | Background Check | Required Documents | Training | **Summary** |

General Information

Primary Location	Rice Memorial High School(Burlington)
Locations and Roles	**Rice Memorial High School (Burlington)** • Volunteer at a parish or church ✓
Profile	User

Most Recent Training

Training	Date
Protecting God's Children® Online Awareness Session 3.0	10/30/2021

Most Recent Completed Background Check

Background Check	Date
Sterling2021 - Parish Package	11/18/2021

Most Recent Required Document

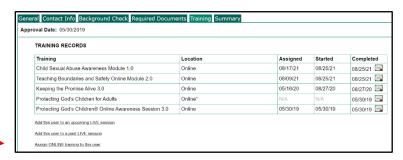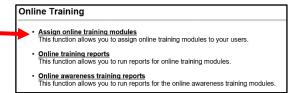| Document	Date
Policies on Ethics and Integrity in Ministry	10/30/2021

How to assign a Module?

1. The best method to assign online training is to click on the Training tab of the user's record and then "Assign Online training to this user" that will send out a notification to the user to log in and complete the online traning assigned.

2. To assign a module to multiple users, click on the "Online Training Modules: on the left-hand side of the screen.

3. Click on "Assign online training modules" to assign the module.

4. Select a user(s) by selecting "Look up users by name" to view. Then click on "Continue".

5. In Step 1, Type in the users first or last name and select when it appears in the "Search Users" box, then add. The user(s) will appear in Step 2 within "Selected Users", and you always have the ability to de-select as needed. Then "Submit" the user(s) selected in Step 3.

6. Click on the Protecting God's Children Online Awareness Session 4.0 or the needed module. It will default to a due date of two weeks; however, you can change this date. Click "Assign Training" to complete the assignment.

   Please note that once assigned to a person's approved record, they will have access to the online training when they next log in to their account.

How do I create Reports within VIRTUS Online?

1. There are various reports that can be created using VIRTUS Online. To begin, select the "Administration" tab from the tabs at the top of the page. Then choose a report within Quick Links. The reports can be viewed on the screen or exported to a CSV file and saved in Excel format.
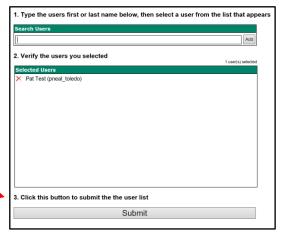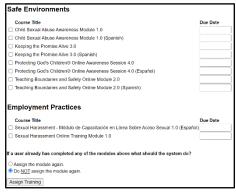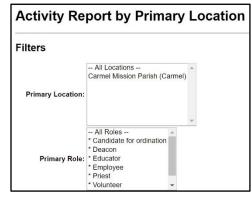
> | Run Report to Screen | Export Report to CSV |

Quick Links

- Live training report
- Calendar of Scheduled Training
- Training bulletin report
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Activity Report by Location
- Activity Report by User
- Renewal Report
- Master Report—Local level, Report to screen (previous version)
- **New Master Report (2022)**

2. The **Activity Report** allows an overall view of the Primary Location's Training, Background Checks run, and Required Documents acknowledged in the date period selected. Select the needed filters to build the needed report. The selections will remain selected until revised. The report can be run by Location or User.

Activity Report by Primary Location

Filters

Primary Location:
-- All Locations --
Carmel Mission Parish (Carmel)

Primary Role:
-- All Roles --
* Candidate for ordination
* Deacon
* Educator
* Employee
* Priest
* Volunteer

3. The **Renewal Report** provides a snapshot view of users that have received notification of a needed compliance item to complete. The system is set to send out an automatic email providing notification when a user is due to complete annual online training. The renewal report identifies the users receiving notifications until the user completes the requirement.

Renewal Report

Filters

Location:
-- All Locations --
All Saints Parish (Richford)

Role:
-- All Roles --
* Candidate for ordination
* Deacon
* Educator at a diocesan affiliated school
* Employee at a parish or church
* Employee at a residential care facility adi
* Employee of the diocese

From: 01/04/2022   To: 01/07/2022

| Run Report to Screen | Export Report to CSV |

4. The **Background Check Report by Date, Location, Status** displays a list of users and a report of their background checks, filterable by background check date, user location, and background check status.

- **Background Check Report by Date, Location, Status**
  Displays a list of users and a report of their background checks,

You may filter the background check report by any of the criteria below, but none are required.

If the date filters are used, the report will include all background check records created between the start date and end date.

All checked statuses will be reported. If no status is checked, all statuses will be included in the report; Incomplete, Pending and Complete. Within the report, you can drill into the user's record to review.

User Location:
-- Select a user location --

Background Check Start Date:

Background Check End Date:

Background Check Status:
☐ Incomplete
☐ Pending
☐ Complete

Get Report

5. The **New Master Report – 2021** is essential for auditing locations and combining all the most important details into one easy to read report is the New Master Report.

This report allows coordinators to filter user requirements revealing only the most recent dates of completion. This report offers you the flexibility of combining or listing requirements separately.

In addition to filtering locations and/or roles, the new master report can filter users who are currently active, active and pending, or reveal all users active and inactive for a location. This is very helpful as an end of year report for locations.
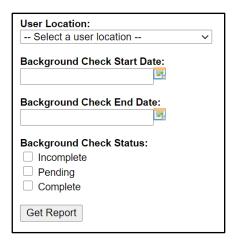
Master Report

Filters

-- All Locations --
All Saints Parish (Richford)

Location:

User Fields

- ☑ Last
- ☑ First
- ☐ Middle
- ☐ Nickname
- ☐ Salutation
- ☑ Login ID
- ☑ Email
- ☐ Account Status
- ☑ Primary Location
- ☐ Primary Location ID
- ☐ All Locations (select to find users in secondary s
- ☐ Roles in primary location only (select to limit rol
- ☑ All Roles
- ☐ Profile
- ☐ Position/Title
- ☐ Continuing Training Status

Background Checks

☐ Combine all selected background check types into one column - You must select the items

- ☐ Fastrax: Manually entered (inactive)
- ☐ iCORI: iCORI (Massachusetts) (inactive)
- ☐ OSEP Background Check: OSEP
- ☐ Out of State: Out of State (inactive)
- ☐ Pre-Fastrax: Background Check (inactive)
- ☐ Selection: Fastrax
- ☐ Sterling2021: Parish Package
- ☐ VCIC: VCIC (inactive)
- ☐ VT Agency of Human Service: Adults (inactive)
- ☐ VT Agency of Human Service: Children (inactive)
- ☐ VT Agency of Human Service: VT Drivers License (inactive)
- ☐ VT Drivers License: VT Drivers License (inactive)

I want to show another background check grouping

Required Documents

☐ Combine all selected document types into one column - You must select the items below to

- ☐ Code of Conduct
- ☐ Policies on Ethics and Integrity in Ministry

I want to HIDE the initial training section

Initial Training

The first training record from the training types selected below will appear in a single column

Live
- ☐ Protecting God's Children for Adults
- ☐ Protecting God's Children for Facilitators
- ☐ Protecting God's Children for Parents
- ☐ Sex Abuse Prevention

Online
- ☐ Bullying/Cyberbullying
- ☐ Child Sexual Abuse Awareness Module 1.0
- ☐ Child Sexual Abuse Awareness Module 1.0 (Spanish)
- ☐ Keeping the Promise Alive 3.0
- ☐ Keeping the Promise Alive 3.0 (Spanish)
- ☑ Protecting God's Children® Online Awareness Session 3.0 (Spanish)
- ☑ Protecting God's Children® Online Awareness Session 4.0
- ☑ Protecting God's Children® Online Awareness Session 4.0 (Español)
- ☑ Protecting God's Children® Online Awareness Session 3.0
- ☐ Sexual Harassment - Módulo de Capacitación en Línea Sobre Acoso Sexual 1.0 (Español)
- ☐ Sexual Harassment Online Training Module 1.0
- ☐ Teaching Boundaries and Safety Online Module 2.0
- ☐ Teaching Boundaries and Safety Online Module 2.0 (Spanish)
- ☐ The Safe Environment Awareness Program for International Priests™

Continuing Training

☐ Combine all selected training types into one column - You must select the items below to co

Live
- ☐ Protecting God's Children for Adults
- ☐ Protecting God's Children for Facilitators
- ☐ Protecting God's Children for Parents
- ☐ Sex Abuse Prevention

Online
- ☐ Bullying/Cyberbullying
- ☑ Child Sexual Abuse Awareness Module 1.0
- ☑ Child Sexual Abuse Awareness Module 1.0 (Spanish)
- ☑ Keeping the Promise Alive 3.0
- ☑ Keeping the Promise Alive 3.0 (Spanish)

Bulletins

☑ Protecting God's Children for Adults

- ○ Show only users who are currently active
- ● Show only users who are currently active (including pending users)
- ○ Show only users who are currently pending
- ○ Show users who were active from: 07/01/2019 to: 06/30/2020
- ○ Show all users*

[Run Report to Screen] [Export Report to CSV]

6. The **C/D Report** assists Archdiocesan coordinators with completing the Audit C/D report. It gathers and totals Role data for specific line items on the annual audit, such as training and background checks. It will report Role totals regarding the # of complete and # of not compete items for the audit period selected. To access this report, select the Administration tab, then the quick link for Compliance Audit- Chart C/D Combo. Choose your report year, your location, and training and background check renewal parameters from the drop-down menus. Select the Run button.

- Calendar of Scheduled Training
- Rankings
- Training bulletin report
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Activity Report

Compliance Audit - Chart C/D

There two different methods for running this report:

1. **Include users who were active at ANY TIME during the audit period**

How do I create Reports for Children's Training within the Educators Tab?

1. To record children's training, click on the Educators Tab and then **Record Training**.

2. To record a training session:

   a. Select the program name
   b. Enter where the training occurred
   c. Select the report year
   d. Number of children trained
   e. Number opted out
   f. Number absent
   g. Any needed comments
   h. Select Continue

3. Please confirm the record and click on **Record Training**.

4. Click on **Detailed Report** to review recorded training for all locations with the ability to select a specific location. Only locations that have recorded training will appear in the dropdown.

5. The **Summary Report** will show a summary of totals for all locations.