Local Safe Environment Administrator Guide

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.

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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.

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.
**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 training 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.

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.

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.

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.

   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.
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.

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 complete 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.
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.