



# Local Safe Environment Coordinator (LoSEC) Website Guide



Log in to your VIRTUS account at [www.virtus.org](http://www.virtus.org)  
to review the functionalities of the VIRTUS Platform.

## Office of Safe Environment

Deb Knaus  
920-272-8198  
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## VIRTUS Programs Office

888-847-8870  
[helpdesk@virtus.org](mailto:helpdesk@virtus.org)

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

## Frequently Asked Questions:

*How do I view my own location(s) employees  
and volunteers who have online registrations  
within VIRTUS Online? Pg. 2*

*How do I assist with recovering an individual's  
username or password as a LoSEC  
Administrator? Pg. 3*

*How do I add a new user? Pg. 4*

*How do I assign online training? Pg. 5*

*How do I view who has a past-due online  
training module, and send them a reminder  
email? Pg. 6*

*How do I review an account to view and add a  
background check and required document,  
and review training? Pg. 7*

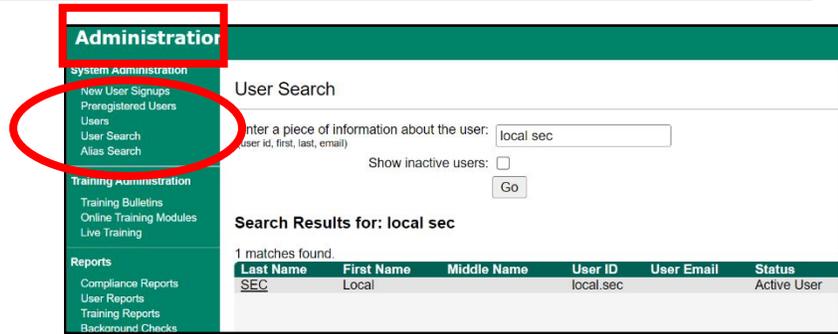
*How do I update references? Pg. 8*

*How do I create Reports within VIRTUS  
Online? Pg. 9-11*

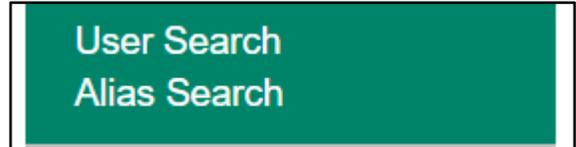
*If an individual took the training in another  
Diocese, how do we ensure the training  
appears in the Database? Pg. 12*

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

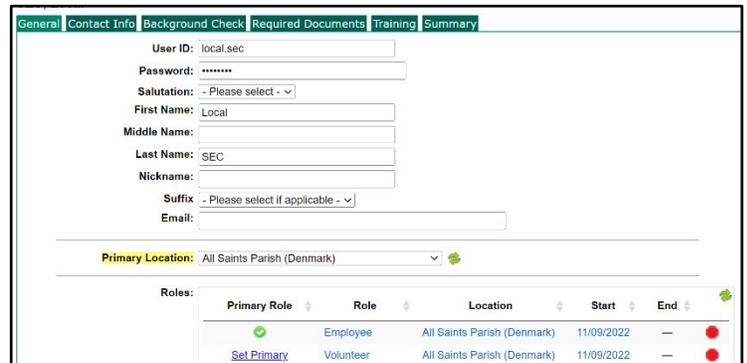
1. Select the “Administration” tab from the tabs at the top of the page:
  - a. New User Signups – indicates that the training session has passed, and the user is awaiting approval.
  - b. Preregistered Users – only used for live sessions (and the Diocese of Green Bay only utilizes online training).
  - c. Users – indicates the list of users within the coordinators location(s)



2. The employees and volunteers for your affiliated location(s) will be listed in alphabetical order by last name. You can search in the Search box for all individual users within the Diocese, then select 'User Search' and an 'Alias Search'. If an individual is missing from your list, the person may not have registered online.



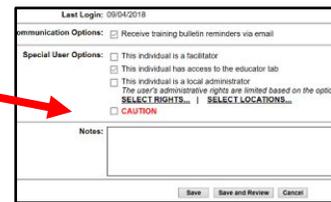
- a. If the user is listed within your location(s), you will have the ability to edit information within the General Tab, such as User ID, Name, Email, Location and Role, and then select Save or Save and Review. If the user is not within your location(s), you can request access to this user by clicking on 'Request access to this user' sending a message to the LoSEC to add the user to your location.



- b. If a **CAUTION** or  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, **Hover** over the designated Role, Location or Date.



- d. If you are the only location listed in the Roles Section, once you click the red stop sign and click “set” this will inactivate the record.

# How do I assist with recovering an individual's username or password as a LoSEC?

1. The LoSEC may assist with recovering the username/password only for accounts that are active and the location is listed in the "Roles" section.

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 LoSEC 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, the LoSEC should 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.

- b. If the LoSEC does not share the same "Primary" or "Additional" location as the individual, the LoSEC can only inform the individual of his/her User ID and request that the individual use the password recovery function on the homepage of [www.virtus.org](http://www.virtus.org).

The screenshot shows a web interface for account administration. At the top, a green bar contains the word 'Administration'. Below it, the user profile for 'AAdministrator, Site' is displayed. The profile includes fields for User ID (local\_jackson), Password (masked with dots), Salutation (- Please select -), First Name (Site), Middle Name, Last Name (AAdministrator), and Email (pneal@virtus.org). A red box highlights the 'Email account info' button in the bottom right corner of the profile section.

The screenshot shows a login form titled 'LOGIN FOR EXISTING ACCOUNTS'. It has two input fields: 'Username:' and 'Password:'. Below the password field is a 'Sign In' button. A red link 'Need login information?' is located below the password field.

The screenshot shows two forms. The top form is titled 'PASSWORD RESET' and contains the text: 'If you have forgotten your password, but know the username or email address associated with this account, please enter it below:'. It has an input field for 'Username or email address' and a 'GO' button. The bottom form is titled 'USERNAME RECOVERY' and contains the text: 'If you have forgotten the username and email address associated with your account, please complete the form below to attempt to retrieve your username.' It has input fields for 'First name' and 'Last name'.

# How do I Add a New User?

1. To add a New User, click on Add New User and provide the needed information.

Under “Continuing Training Status” please select “Required to complete continuing training per policy.”

Under “Profile” select either Employee or Volunteer.

2. Select the primary location and then the associated role(s), and any additional locations and corresponding roles.

3. Please select the option needed to set up the account:

- a. Select “No training” and click “Continue.”
- b. Then under “Training session” toward the bottom click on “Make Changes.”
- c. **ONLY** select “Assign online training to this user” and then **Process registration.**”

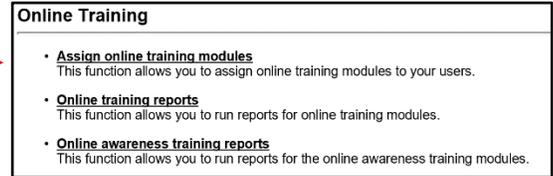
Training session: **Do not** provide session information during the registration process. (Make changes...)

# How do I assign a Module?

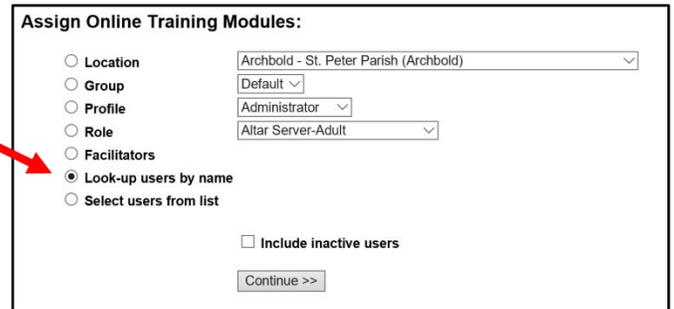
1. Within the Administration tab, click on the "Online Training Modules" on the left-hand side of the screen.



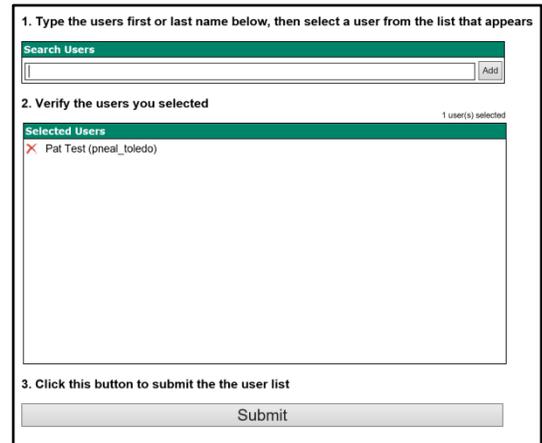
2. Click on "Assign online training modules" to assign the module.



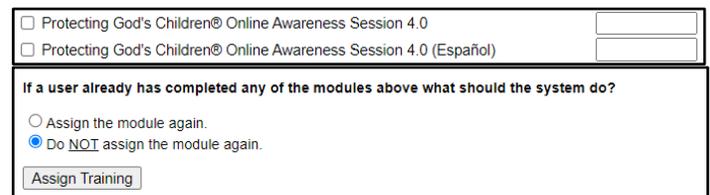
3. Select a user(s) by selecting "Look up users by name" to view. Then click on "Continue".



4. 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.



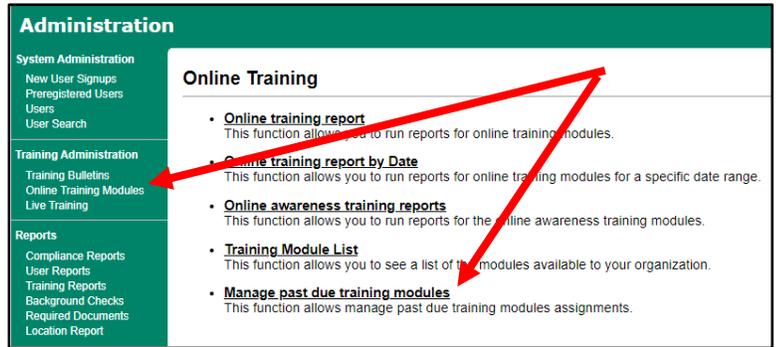
5. Click on the training module you would like to assign. It will default to a due date of two weeks; however, you can change this date. Click "Assign Training" to complete the assignment.



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 view who has a past due online training module assigned to them, and send them a reminder email?

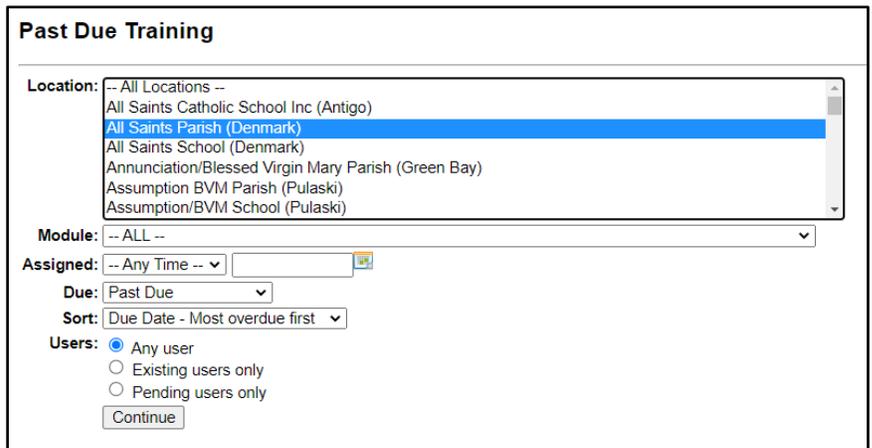
1. To view who has a **past due training module**, go to “Administration,” click on “Online Training Modules” and then click on “Manage past due training modules.”



2. Select your location, and any specific parameters you would like to include. Then click “continue” at the bottom.

From here, you have the option to:

- Send a reminder email about the past due training
- Remove the past due training assignments
- Remove the assignments and inactivate the accounts
- Export to CSV in an excel file



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

1. In order to review an account's main profile page, the LoSEC 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 information will appear with the **Background Check Tab**. A background check prompt feature is available if a user is in need of a background check. The prompt will send an email to the person asking that they log in to submit a background check. **BE SURE THE EMAIL IS CORRECT.**

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

**Background Screening**

Date	Type & Provider	Name Submitted	Run By	Report Location	Comments	Complete	Results
12/01/2022	Volunteer ISP	Test Account		Diocese of Green Bay	CMP - CLEAR	Yes	Eligible

**Background Check Information**

List any aliases, maiden names, or previous marriage names.

first name                      last name

Alias 1

Alias 2

Alias 3

The Required Documents that are electronically acknowledged will appear within the **Required Documents Tab**, and the ability exists to Record a document and prompt for a user. The prompt will send an email to the person asking that they log in to acknowledge the policy.

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

**Required Documents**

Document	Date Acknowledged	Recorded By	Comments
Diocesan Code of Pastoral Conduct	11/01/2022	System Admin	
Declarations Form	11/01/2022	System Admin	

The training information will appear within the **Training Tab**, and the ability exists to print the training certificate by clicking on the certificate icon.

- a. Assign online training to this user sends a notification to the user to log in and complete the assigned online training (refer to How to Assign a Module).

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

Approval Date: 11/09/2022

**TRAINING RECORDS**

Training	Location	Assigned	Started	Completed
Protecting God's Children® Online Awareness Session 4.0	Online	11/09/22	11/09/22	11/09/22

[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.

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

**General Information**

Primary Location: Chancery Office(Jackson)

Locations and Roles: Chancery Office (Jackson) • Volunteer ✓

Profile: User

**Most Recent Training**

Training	Date
Protecting God's Children for Adults	08/04/2018

**Training Bulletins**

Type	Featured	Read	Missed
Protecting God's Children for Adults	1	0	1

**Most Recent Completed Background Check**

Background Check	Date
ISP - Volunteer	06/16/2020

**Most Recent Required Document**

Document	Date
Protection of Children Policy	06/16/2020

## How do I update References?

- When a person registers through the Registration process, they will be directed to complete the Reference screens.

**Note that volunteers are required to submit 3 references, and employees are required to submit 5 references.**

**Reference 1 of 3**

First	<input type="text"/>
Last	<input type="text"/>
Email	<input type="text"/>
Phone 1	<input type="text"/> Type: -- Select --
Phone 2	<input type="text"/> Type: -- Select --
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Relationship	<input type="text"/>
Years Known	<input type="text"/>
<input type="button" value="Save"/>	

- To view and update the reference fields, you can click on the Background Tab of a User within the Administration Tab. Then click on the Edit box.

**References**

Name	Updated On	Updated By	Status	Comments	Edit
One, Test	11/15/2017	,			<input type="button" value="Edit"/>
Two, Test	11/15/2017	,			<input type="button" value="Edit"/>
Three, Test	11/15/2017	,			<input type="button" value="Edit"/>

- To view a reference, click the Edit field to view and update the Status to Attempted or Completed. And, enter any Comments needed. Then 'Save' to store the data.

If there is a need to contact a fourth reference due to a failed attempt to contact a given reference, please note in the Comments section.

Years Known	<input type="text" value="5"/>
Status	-- Select -- New Attempted Completed Unknown
Comments	<input type="text"/>
<input type="button" value="Save"/>	

- Once the references have been completed, the information will be noted in the 'Status' and 'Comments' fields. The 'Updated By' will default to the Screening Coordinators name. The ability exists to 'Add a reference.'

**References**

Name	Updated On	Updated By	Status	Comments	Edit
Test, Patricia	01/30/2018	,	Completed		<input type="button" value="Edit"/>
Test, Pat	01/30/2018	,	Unknown	Unable to locate.	<input type="button" value="Edit"/>
Test, Pat	01/30/2018	,	Attempted		<input type="button" value="Edit"/>

[Add a reference](#)

# 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 “VIRTUS Online Administration.” The reports can be viewed on the screen or exported to a CSV file and saved in Excel format.



**VIRTUS Online Administration**  
**Main Reports**

- Master Report
- Compliance Report
- Compliance Audit—Chart C/D Combo
- Renewal Report

**Quick Actions**

- Approve users
- Schedule a session

**Other Reports**

- Activity Report by Location
- Activity Report by User
- Background Check Report
- Calendar of Scheduled Training
- Compliance Audit—Required Documents
- Live Training Report
- Training Bulletin Report

2. The **Activity Report** provides 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.

**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 online training. The renewal report identifies the users receiving notifications until the user completes the requirement.*

**Renewal Report**  
**Filters**  
Location: -- All Locations --  
Carmel Mission Parish (Carmel)  
Role: -- All Roles --  
\* Candidate for ordination  
\* Deacon  
\* Educator  
\* Employee  
\* Priest  
\* Volunteer

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

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

### Master Report

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**Filters**

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

Role: -- All Roles --  
\* Candidate for ordination  
\* Deacon  
\* Educator  
\* Employee  
Facilitator  
Global Outreach

Profile: -- All Profiles --  
Administrator  
Deacon  
Deacon Aspirant  
Deacon Candidate

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.

### 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

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

### Background Checks

Combine all selected background check types into one column - You must select the items below to combine

ISP - Employee  
 ISP - Volunteer

[I want to show another background check grouping](#)

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### Required Documents

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

Declarations  
 Protection of Children Policy

[I want to show initial training separate from continuing training](#)

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### Training

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

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### Live

Praesidium, Called to Protect  
 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

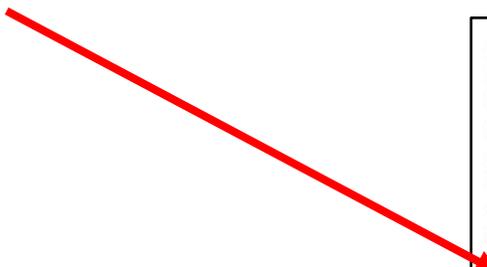
Show users who were active from:  to:

Show facilitators only

Show local administrators only

Show only users who are inactive

Show all users (including inactive users)\*



6. The **Compliance Report** provides a quick overview of who is in or out of compliance, per diocesan requirements. To run this report, go to the “Administratin” tab and under “Main Reports” select “Compliance Report.”

**VIRTUS Online Administration**

**Main Reports**

- Master Report
- Compliance Report
- Compliance Audit—Chart C/D Combo
- Renewal Report

**Quick Actions**

- Approve users
- Schedule a session

**Other Reports**

- Activity Report by Location
- Activity Report by User
- Background Check Report
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- Compliance Audit—Required Documents
- Live Training Report
- Training Bulletin Report

Select your location from the dropdown menu. You can either add additional filters, or just select “Run Report”:

You may export to Excel as a CSV file by selecting “Export.”

**Compliance Report**

Use this page to see user compliance status

First Name:  Last Name:  Compliant:  Active:

Location:  Role:  Profile:

Items:  BGC  Bulletins  Documents  Training

Run Report Reset Cancel Export Update

After running the report, those in compliance will have a green checkmark, and those not in compliance will have a red dash.

<input type="checkbox"/>	First Name	Last Name	Role(s)	Site(s)	Active	Compliance	Details
<input type="checkbox"/>	Roxana	[REDACTED]	Volunteer	Our Lady of Victories (Paterson)	Y	+	
<input type="checkbox"/>	Rosa	[REDACTED]	Volunteer	Our Lady of Victories (Paterson) St. John Cathedral (Paterson)	Y	+	

For those not in compliance, the items they are missing will be indicated in the right-hand column and are labeled “Needs Attention.”

<input type="checkbox"/>	First Name	Last Name	Role(s)	Site(s)	Active	Compliance	Details
<input type="checkbox"/>	Nivene	[REDACTED]	Employee	Straight & Narrow (Paterson)	Y	-	Needs Attention • BGC • Code
<input type="checkbox"/>	Kelly	[REDACTED]	Educator	Villa Walsh Academy (Morristown)	Y	-	Needs Attention • BGC

## ***If an individual took the VIRTUS training in another Diocese, how do we ensure the training appears in the Database?***

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1. If an individual tells you that they have completed the training in another diocese, as long as they received credit for that training and have an online account, the VIRTUS Help Desk can transfer that user into the Diocese so that the training they completed appears in the VIRTUS database. When transfers occur, the VIRTUS Help Desk will contact the Diocesan Safe Environment Office, and ask them to review the account to ensure that it is properly situated.
2. To contact the VIRTUS Helpdesk, please call 888-847-8870 or email at [helpdesk@virtus.org](mailto:helpdesk@virtus.org).

Resources	Reporting Child Abuse	Contact Information	Help / FAQs
<p><b>For help with registration, passwords, User IDs, background checks and website questions, please <a href="#">click here to first review our Online Help / FAQs section</a> as your question may already be answered.</b></p> <p>After reviewing the <a href="#">Online Help / FAQs section</a>, for additional questions regarding online assistance, <a href="#">message us using our Online Helpdesk Email Form</a>.</p> <p><b>VIRTUS toll-free phone number for online assistance, questions and ordering:</b> <a href="tel:1-888-847-8870">1-888-847-8870</a></p>			