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

Local Safe Environment Coordinator (LoSEC) Website 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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888-847-8870
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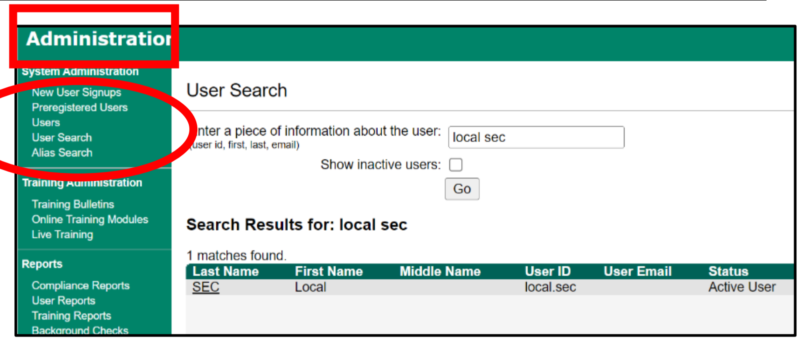
(To inquire about your specific access, communicate with your Diocesan Safe Environment Coordinator.)

Frequently Asked Questions:

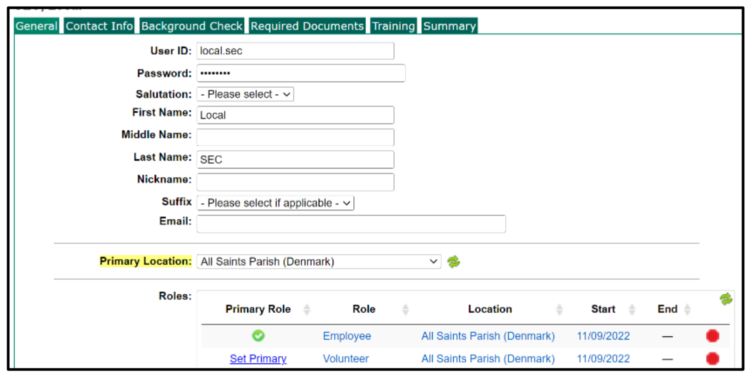
How do I view my own location(s) accounts for the employees and volunteers who have online registrations within VIRTUS Online?



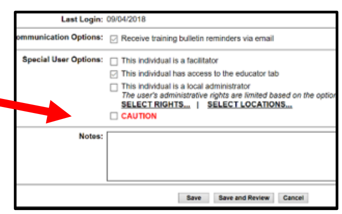
1. Select the "Administration" tab from the tabs at the top of the page:
   a. New User Signups – indicates that the training session has passed, and the user is awaiting approval.
   b. Preregistered Users – only used for live sessions (and the Diocese of Green Bay only utilizes online training).
 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

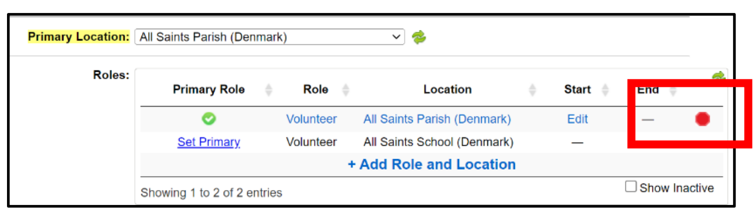


   b. If a **CAUTION** or  appears in the Special User Options, please contact the Diocesan Safe Environment Office to determine the issue. The issue may appear in the Notes section.



   c. 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.

      Please do not list a user as inactive when removing them from your location, as they will still show up as active within the system.

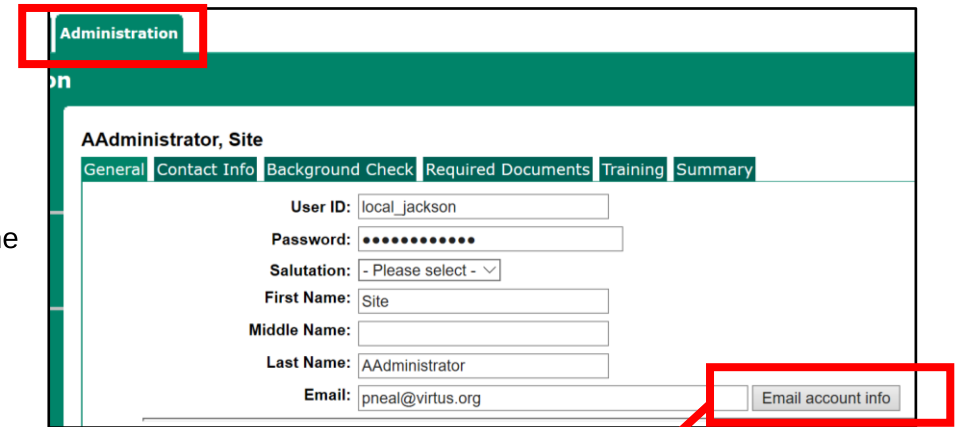


   d. If you are the only location listed in the Roles Section, once you click the red stop sign and click "set" this will inactivate the record.

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?"*



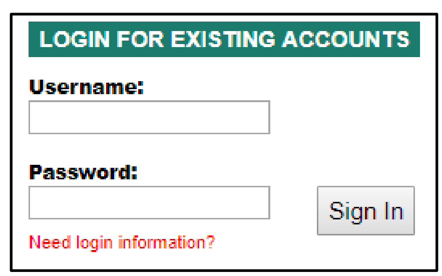
2. Once the account is located, click on the last name to pull up the profile information.

   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.

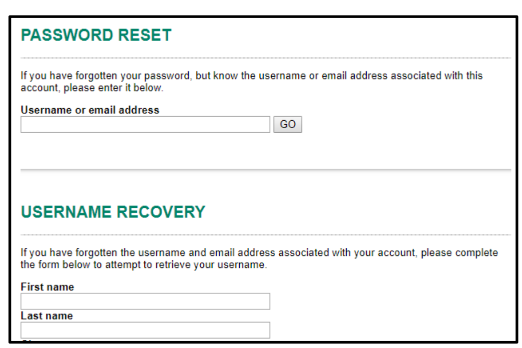
      i. First, the LoSEC should check that the email listed within the account is accurate

      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.

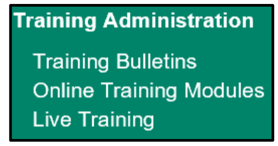


   b. If the LoSEC does not share the same "Primary" or "Additional" location as the individual, the LoSEC can only inform the individual of his/her User ID and request that the individual use the password recovery function on the homepage of [www.virtus.org.](http://www.virtus.org)

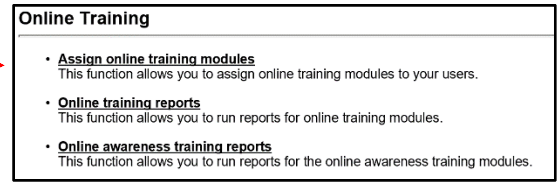


How do I assign a Module?

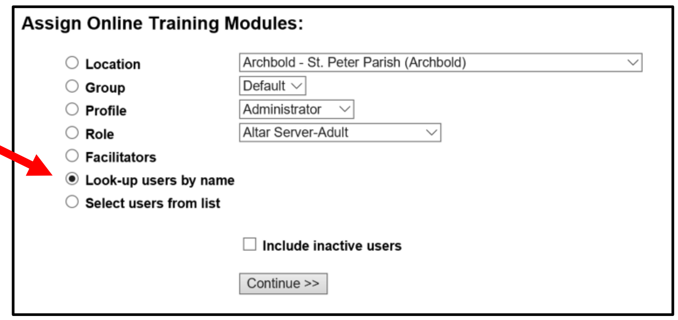
1. Within the Administration tab, click on the “Online Training Modules” on the left-hand side of the screen.



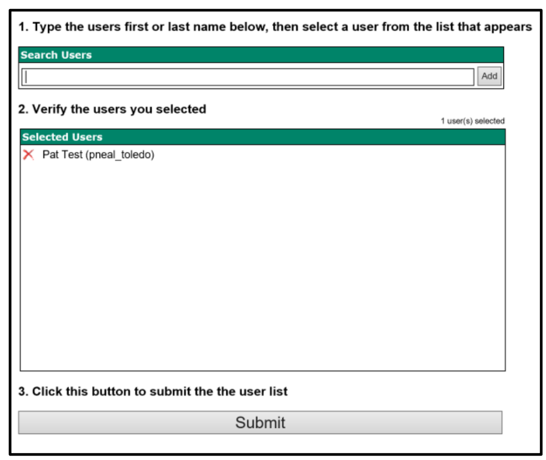
2. Click on “Assign online training modules” to assign the module.



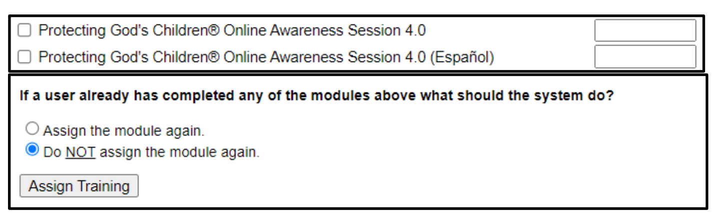
3. Select a user(s) by selecting “Look up users by name” to view. Then click on “Continue”.



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.



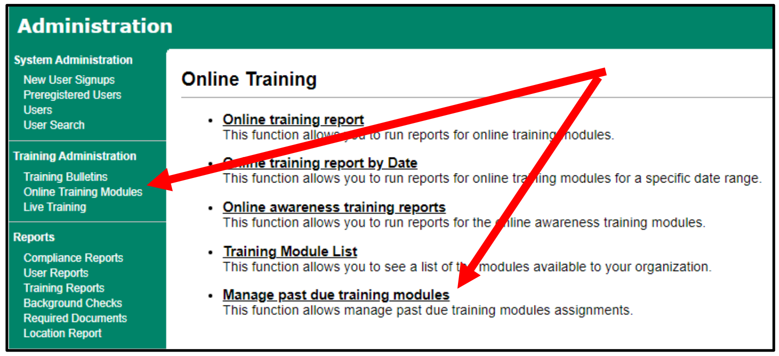
5. Click on the training module you would like to assign. It will default to a due date of two weeks; however, you can change this date. Click “Assign Training” to complete the assignment.



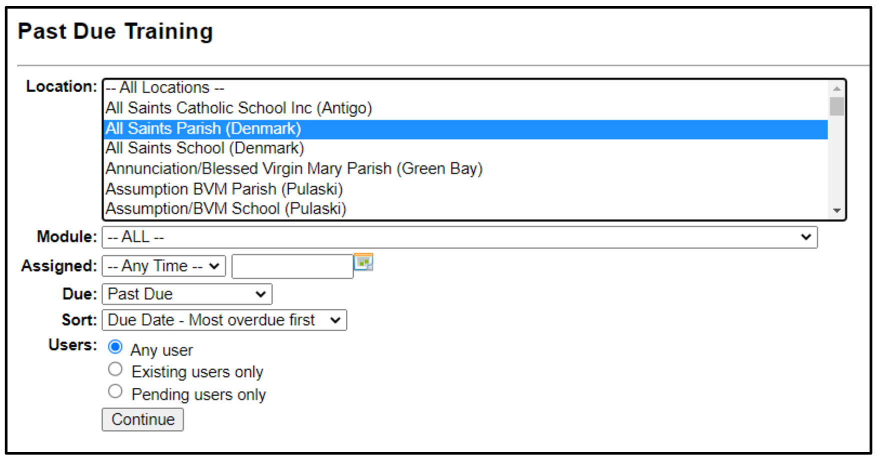
Please note that once assigned to a person’s approved record, they will have access to the online training when they next log in to their account.

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.



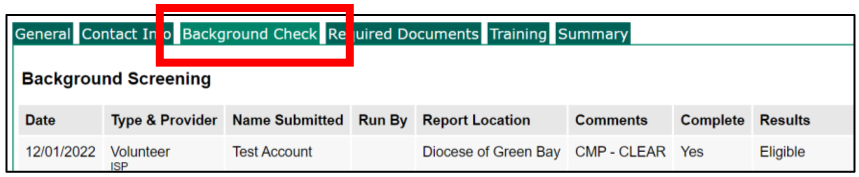
From here, you have the option to:

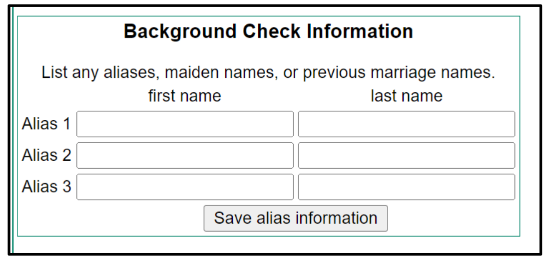
- Send a reminder email about the past due training
- Remove the past due training assignments
- Remove the assignments and inactivate the accounts
- Export to CSV in an excel file

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

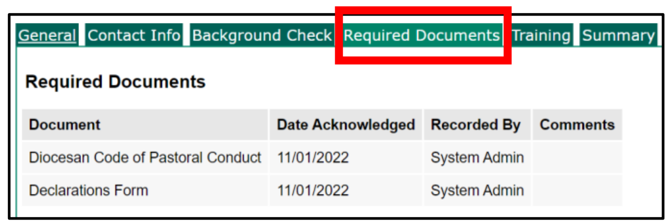
1. In order to review an account's main profile page, the LoSEC must first search for the user and click on the person's name to open up the profile. Once a user is selected, an "active" user will have all of the following tabs associated within the account.

   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.**

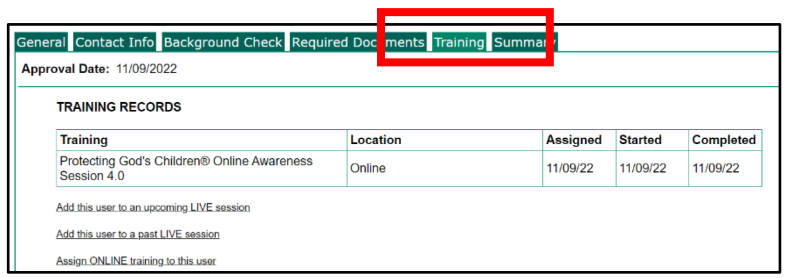




   The Required Documents that are electronically acknowledged will appear within the **Required Documents Tab**, and the ability exists to Record a document and prompt for a user. The prompt will send an email to the person asking that they log in to acknowledge the policy.



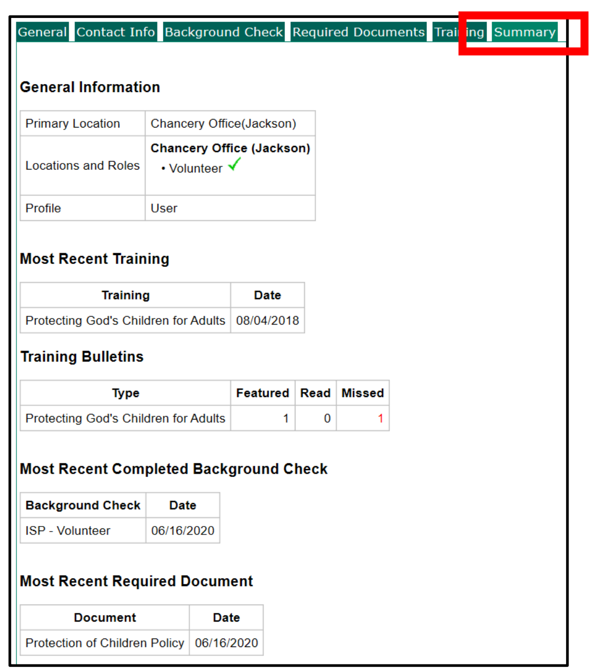
   The training information will appear within the **Training Tab,** and the ability exists to print the training certificate by clicking on the certificate icon.



   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).

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

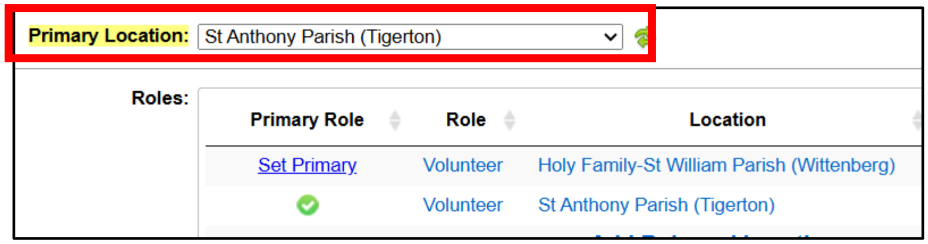
If you see a **CAUTION** notification on a users account, please contact the Diocesan Safe Environment Coordinator for additional information.



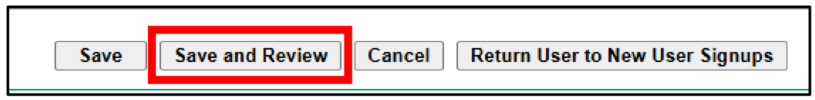
How do I prompt a background check, if one is needed?

1. When someone is new at your location, even if they have a recent background check at another Diocesan location, you must prompt them for a new background check.

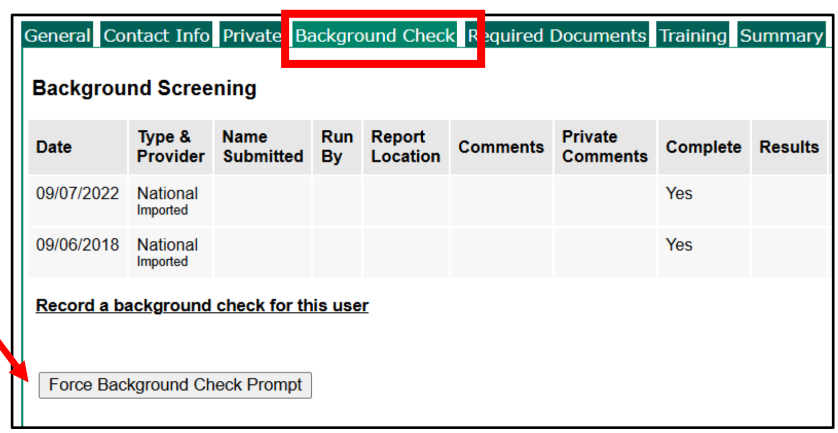
   To do so, please snsure that your location is listed under “primary location” as this is where your invoice will be sent to.



2. Once your location is listed as the “primary location” select “Save and Review.”



3. Next, please navigate to the “Background Check” tab and please select “Force Background Check Prompt.”

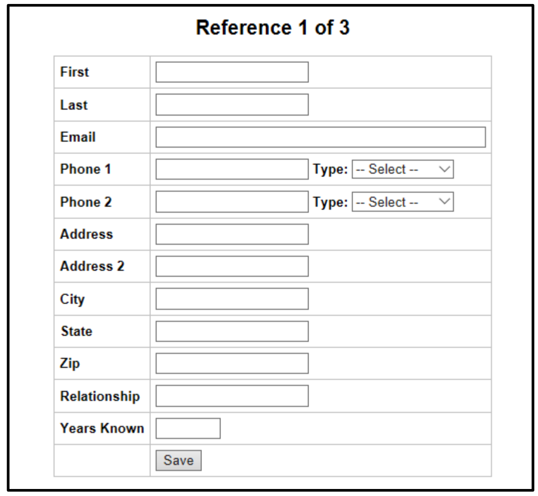


As a reminder, background checks are valid for 4 years (unless if someone is NEW to your location). When someone is coming due for a background check, the system will automatically prompt them to complete their background check and will send a reminder email every 3 days until they sign into their VIRTUS account to complete it.

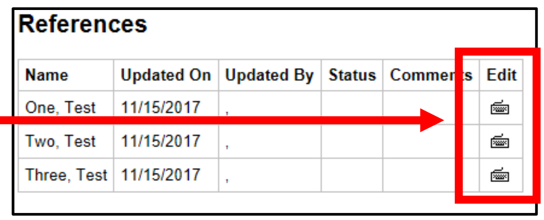
How do I update References?

1. 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.



2. 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.

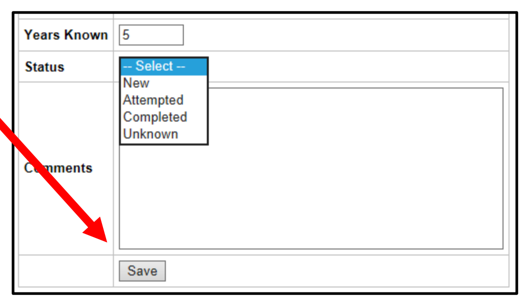


References

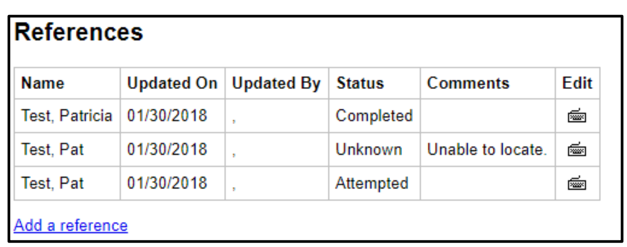
Name	Updated On	Updated By	Status	Comments	Edit
One, Test	11/15/2017	,			
Two, Test	11/15/2017	,			
Three, Test	11/15/2017	,			

3. 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.



4. Once the references have been completed, the information willl 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.'



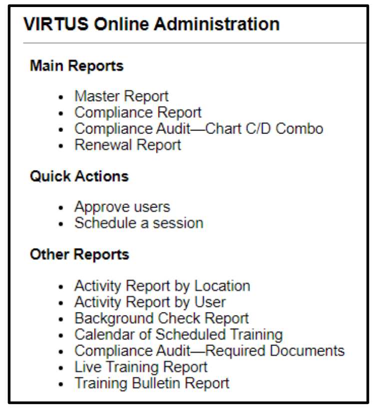
References

Name	Updated On	Updated By	Status	Comments	Edit
Test, Patricia	01/30/2018	,	Completed		
Test, Pat	01/30/2018	,	Unknown	Unable to locate.	
Test, Pat	01/30/2018	,	Attempted		

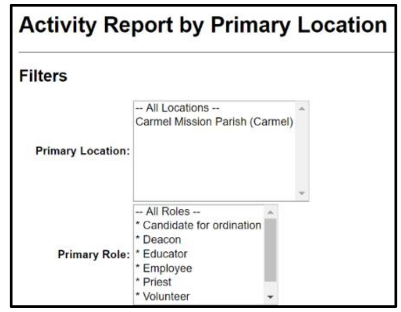
Add a reference

How do I create Reports within VIRTUS Online?

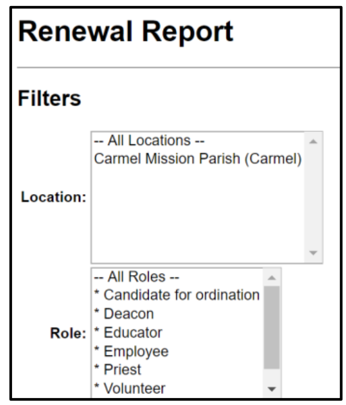
1. There are various reports that can be created using VIRTUS Online. To begin, select the “Administration” tab from the tabs at the top of the page. Then choose a report within “VIRTUS Online Administration.” The reports can be viewed on the screen or exported to a CSV file and saved in Excel format.



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.



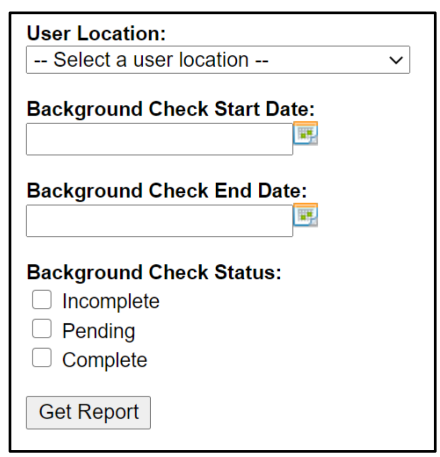
3. The **Renewal Report** provides a snapshot view of users that have received notification of a needed compliance item to complete. The system is set to send out an automatic email providing notification when a user is due to complete online training. The renewal report identifies the users receiving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



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.

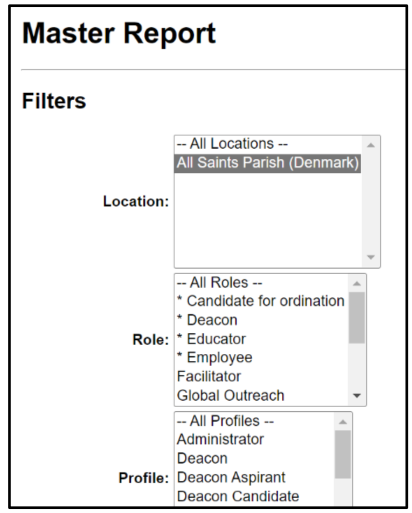
   You may filter the background check report by any of the criteria below, but none are required. This report also shows any user who has an invalid email address.

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

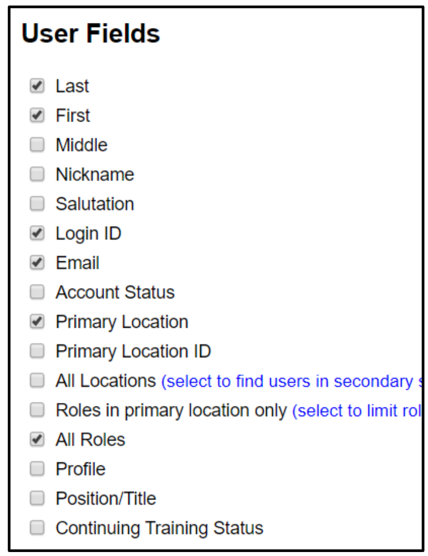


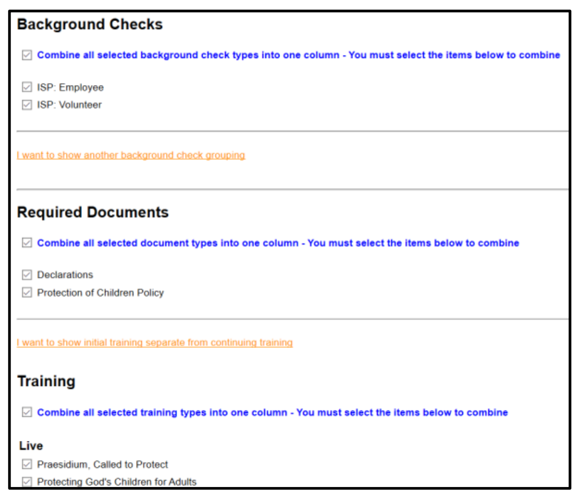
   All checked statuses will be reported. If no status is checked, all statuses will be included in the report; Incomplete, Pending and Complete. Within the report, you can drill into the user’s record to review.

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

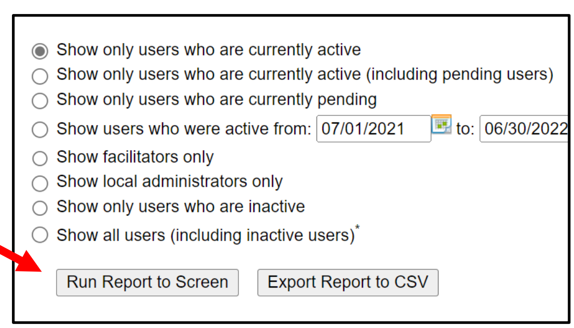


This report allows coordinators to filter user requirements revealing only the most recent dates of completion. This report offers you the flexibility of combining or listing requirements separately.

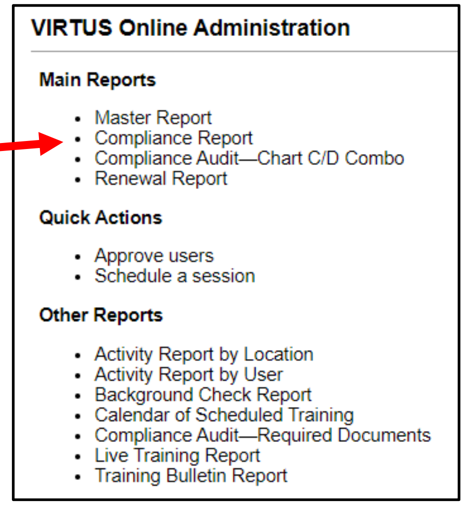




In addition to filtering locations and/or roles, the new master report can filter users who are currently active, or active during a specific period of time, or reveal all users active and inactive for a location. This is very helpful as an end of year report for locations.

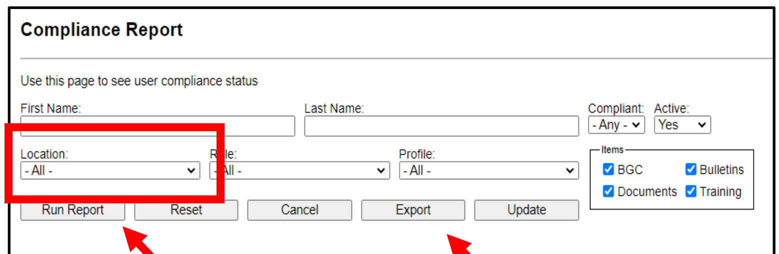


6. The **Compliance Report** provides a quick overview of who is in or out of compliance, per diocesan requirements. To run this report, go to the “Administratin” tab and under “Main Reports” select “Compliance Report.”

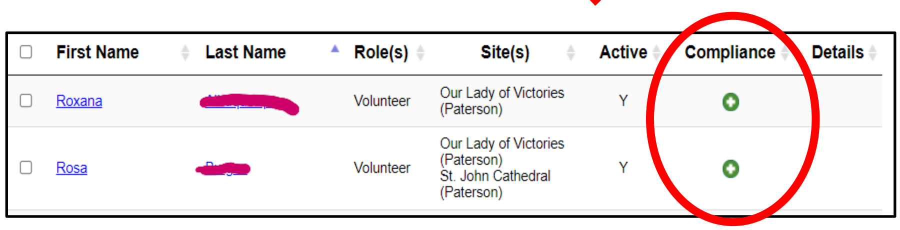


Select your location from the dropdown menu. You can either add additional filters, or just select “Run Report”:

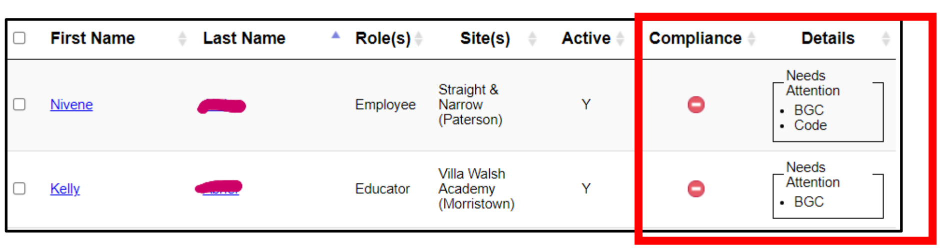
You may export to Excel as a CSV file by selecting “Export.”



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

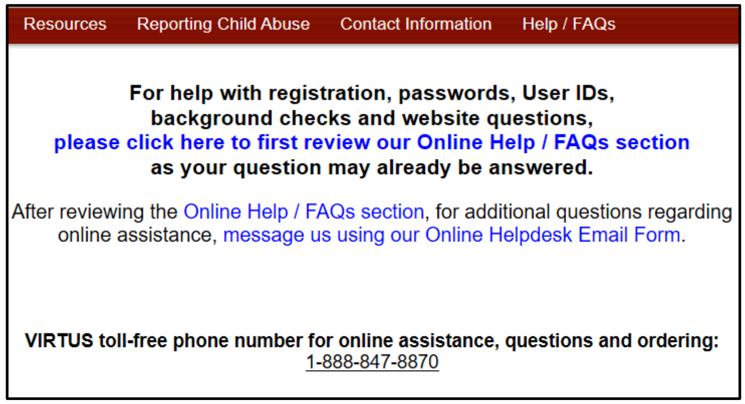


For those not in compliance, the items they are missing will be indicated in the right-hand column and are labeled “Needs Attention.”



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

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.