



Site Administrator Website 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 Archdiocesan Safe Environment Coordinator.)

Frequently Asked Questions:

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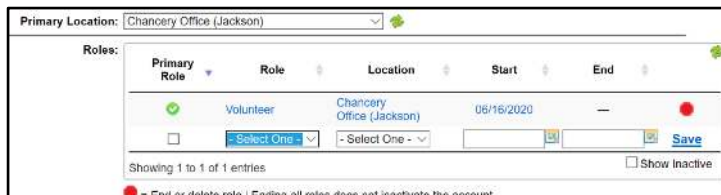
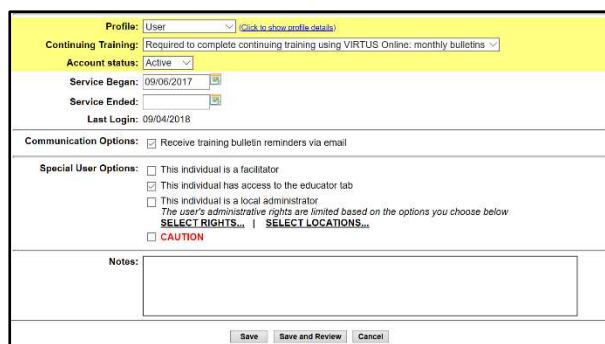
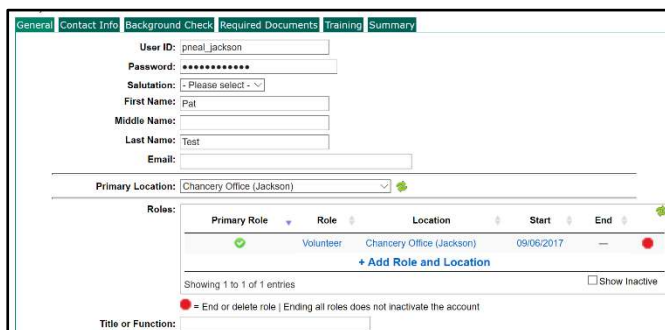
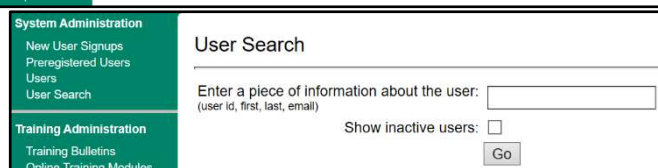
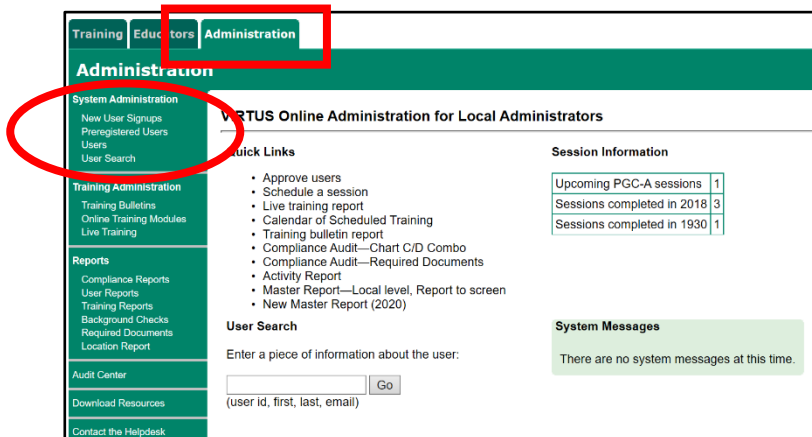
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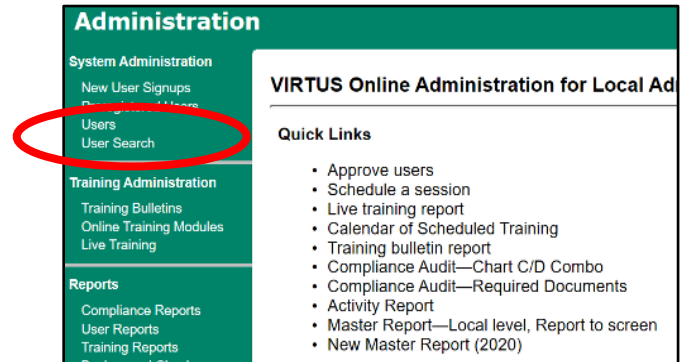
How do I view and edit my own location(s) accounts for the employees and volunteers who have online registrations within VIRTUS Online?

1. Select the “Administration” tab from the tabs at the top of the page:
 - a. New User Signups – indicates that the training session has passed, and the user is awaiting approval.
 - b. Preregistered Users – indicates that the user registered an upcoming session
 - 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 also search in the Search box for individual users, then select “User Search”. If an individual is missing from your list:
 - 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 Archdiocesan 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. 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.



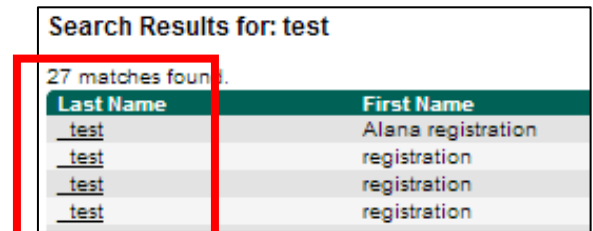
How do I search the entire organization to view if a person has an online registration, and make changes to their account and/or affiliate them with my location?

1. Select the “Administration” tab from the tabs at the top of the page.



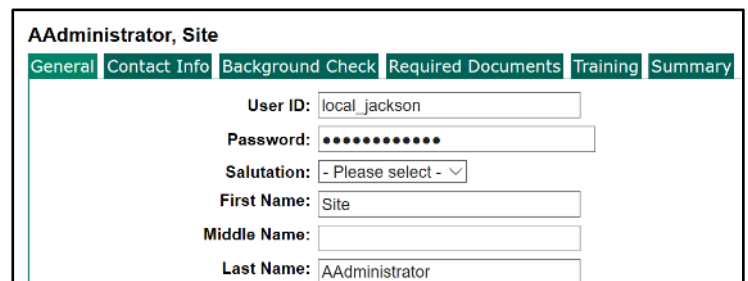
2. To see the most complete list of users available click on the **User Search** in the left-hand side of your screen. Enter in search term and make sure to click “**Show Inactive Users**”, then select “Go”. For searching tips:

- a. Insert the letters of the individual’s last name, first name, user id **or** the email address. Each one of these items must be searched separately and cannot be combined into one individual search (i.e., “John Smith” must either be searched as “John” or “Smith”).
- b. Searching with the first several letters of the last name usually yields the best and largest scope of results (i.e., search “Smi” rather than just “Smith”).
- c. If an individual is missing, double check other possibilities of name spellings, including hyphenated last names and nicknames. It is also best to search more than once for the same person using a different search query.

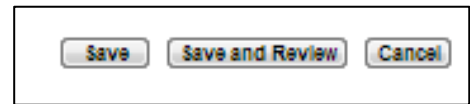


3. If a match is found, then click on the person’s last name to view their account

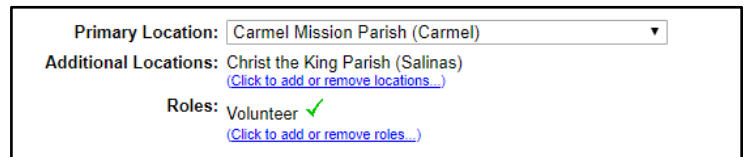
Note: Within the searched person’s account page, the Site Administrator will not be able to make/save any changes if the person’s Primary Location or Additional Location(s) do not match the Site Administrator’s location.



If the searched person's "Primary" or "Additional" locations match the Administrator's, then the Site Administrator will be able to update/save changes to their account, including the ability to change the user's "Email Address," "Mailing Information," inactivate or activate an account, etc.



If the "Save" buttons are not located at the bottom of the account, it is likely that the Site Administrator's account does not match the searched individual's account. **In this case, the Site Administrator should communicate with the Archdiocesan Safe Environment Coordinator to request that the individual's account be updated with the appropriate affiliated location.**



4. If a match is **not** found, it may be that the person did not create an online registration and still needs to create one.

If the individual is unable to complete a registration online, an account can be added by clicking on **Add New User** (see page 8).



If an individual completed training at another diocese, the **VIRTUS Help Desk** (helpdesk@virtus.org or 888-847-8870) can **transfer** the user into the Diocese. 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.

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

1. The Site 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 Site 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, the Site Administrator 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 Site Administrator does not share the same “Primary” or “Additional” location as the individual, the Site Administrator 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.

The screenshot shows a user profile page for 'AAAdministrator, Site'. The 'Administration' tab is highlighted with a red box. The profile information includes: User ID: local_jackson, Password: [masked], Salutation: - Please select -, First Name: Site, Middle Name: [empty], Last Name: AAAdministrator, and Email: pNeal@virtus.org. A red box highlights the 'Email account info' button in the bottom right corner.

The screenshot shows a login form titled 'LOGIN FOR EXISTING ACCOUNTS'. It has two input fields: 'Username:' and 'Password:'. A 'Sign In' button is located to the right of the password field. Below the fields, there is a link that says 'Need login information?' in red text.

The screenshot shows two sections: 'PASSWORD RESET' and 'USERNAME RECOVERY'. The 'PASSWORD RESET' section has a heading and a sub-heading: 'If you have forgotten your password, but know the username or email address associated with the account, please enter it below.' It includes an input field for 'Username or email address' and a 'Go' button. The 'USERNAME RECOVERY' section has a heading and a sub-heading: 'If you have forgotten the username and email address associated with your account, please complete the form below to attempt to recover your information.' It includes two input fields for 'First name' and 'Last name'.

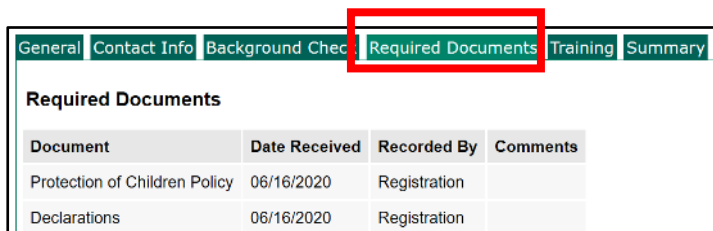
How do I review an account's Safe Environment items and add a new background check/required document?

In order to review an account's main profile page, the Site 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 information will appear with the **Background Check Tab**, and the ability exists to Record a background check for a user.

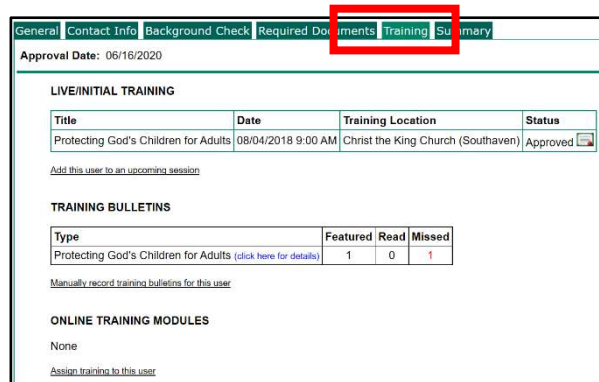


The Required Documents that are electronically acknowledged will appear within the **Required Documents Tab**, and the ability exists to Record a document for a user.



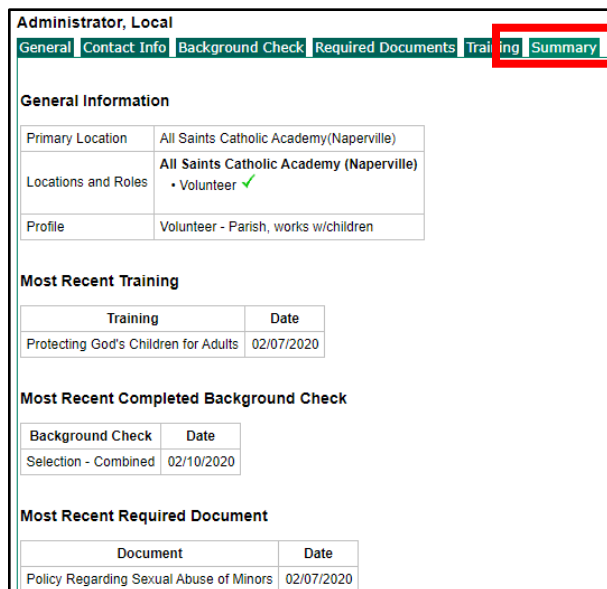
The training information will appear within the **Training Tab**, and the ability exists to print the training certificate by clicking on the certificate icon.

- If live training is accessible, the user can be added to an upcoming session.
- Online training can be assigned, as needed.
- To record previous training use the instructions on pg 9



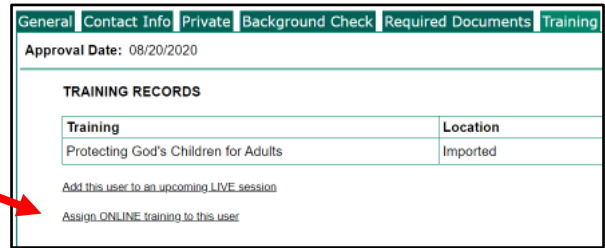
To review a summary of the compliance items, please click on the **Summary Tab**.

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



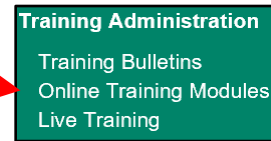
How do I assign the Vulnerable Adults Training Module?

1. To assign directly from the user's account, please click on the Training tab and then click on 'Assign Online training to this user' and follow the instructions in number 6 below.



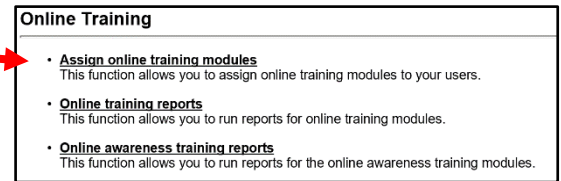
A screenshot of a user profile page with tabs: General, Contact Info, Private, Background Check, Required Documents, and Training. The Training tab is active. It shows an 'Approval Date: 08/20/2020' and a 'TRAINING RECORDS' table with columns 'Training' and 'Location'. The table contains one row: 'Protecting God's Children for Adults' and 'Imported'. Below the table are two links: 'Add this user to an upcoming LIVE session' and 'Assign ONLINE training to this user'.

2. For multiple assignments, click on the "Online Training Modules" on the left-hand side of the screen.



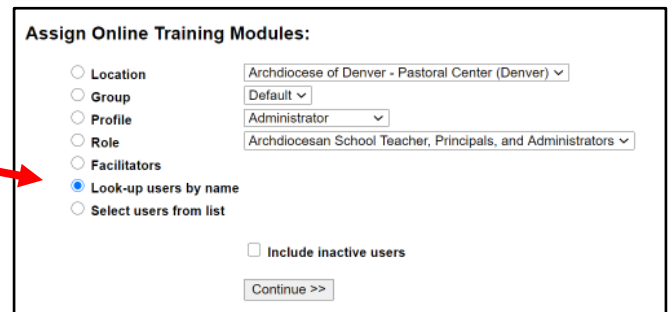
A green box containing the text 'Training Administration' and a list of options: 'Training Bulletins', 'Online Training Modules', and 'Live Training'.

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



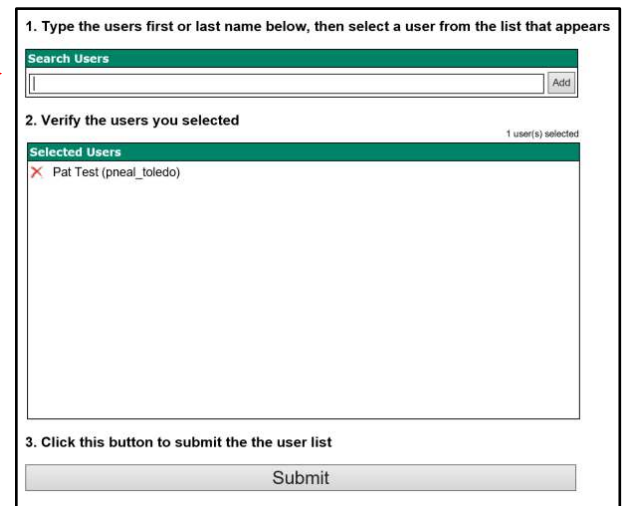
A box titled 'Online Training' containing three bullet points: 'Assign online training modules' (with subtext 'This function allows you to assign online training modules to your users.'), 'Online training reports' (with subtext 'This function allows you to run reports for online training modules.'), and 'Online awareness training reports' (with subtext 'This function allows you to run reports for the online awareness training modules.').

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



A form titled 'Assign Online Training Modules:'. It has several radio buttons: 'Location', 'Group', 'Profile', 'Role', 'Facilitators', 'Look-up users by name' (which is selected), and 'Select users from list'. There are dropdown menus for 'Location' (Archdiocese of Denver - Pastoral Center (Denver)), 'Group' (Default), 'Profile' (Administrator), and 'Role' (Archdiocesan School Teacher, Principals, and Administrators). There is also an 'Include inactive users' checkbox and a 'Continue >>' button.

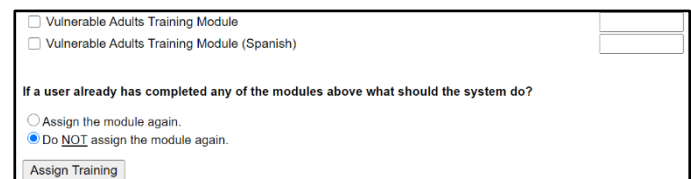
5. In Step 1, type in the users first or last name, and select when it appears in the 'Search Users' box. Then add. The user(s) will appear in Step 2 within 'Selected Users', and you always have the ability to de-select as needed. Then "Submit" the user(s) selected in Step 3.



A two-step interface. Step 1: 'Type the users first or last name below, then select a user from the list that appears'. It shows a 'Search Users' box with an 'Add' button. Step 2: 'Verify the users you selected'. It shows a 'Selected Users' box with one user: 'Pat Test (pneal_toledo)'. Step 3: 'Click this button to submit the the user list'. It shows a 'Submit' button.

6. Click on either English or Spanish Vulnerable Adults online training. 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.



A form with two checkboxes: 'Vulnerable Adults Training Module' and 'Vulnerable Adults Training Module (Spanish)'. Below is a question: 'If a user already has completed any of the modules above what should the system do?'. There are two radio buttons: 'Assign the module again.' and 'Do NOT assign the module again.' (which is selected). There is an 'Assign Training' button.

How do I add a new user?

1. On the Administration tab, click “Users” in the left menu and choose Add New User and provide the needed information.



Choose “Required to complete continuing training by policy” as the Continuing Training Status and “User” as the Profile.

A screenshot of the 'Add New User' form. The form is titled 'Add New User' and contains several input fields: 'First Name', 'Middle Name', 'Last Name', 'Nickname', 'Email', 'Address', 'Address line 2', 'City', 'State', 'ZIP', 'Daytime Phone', 'Evening Phone', and 'Cell Phone'. There are two dropdown menus: 'Continuing Training Status' and 'Profile'. A red arrow points from the text above to these two dropdown menus. A 'Continue' button is at the bottom of the form.

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

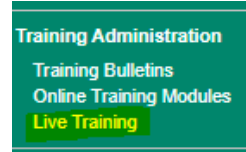
A screenshot of a form with the heading 'Please select the primary location where Test Registration works or volunteers.' Below the heading is a dropdown menu labeled 'Location: - Please select -' and a 'Continue' button. A red arrow points from the text above to the dropdown menu.A screenshot of a list of roles. At the top, it says 'Please check all that apply. You must select at least one role.' Below this is a list of roles with checkboxes: 'Archdiocesan School Teacher, Principals, and Administrators', 'Candidate for ordination', 'Deacon', 'Employee', 'Non-Employee/Non-Volunteer', 'Priest', and 'Volunteer'. A red arrow points from the text above to the first role, 'Archdiocesan School Teacher, Principals, and Administrators'.

3. Please select the option needed to set up the account:
 - a. Add to an upcoming session scheduled.
 - b. Add to a session already attended (PGC only – if CTP, see pg. 9).
 - c. If training is not scheduled through Schedule Training, select No Training. The user will be placed in New User Signup until a session is chosen or previous training recorded as explained on page 9.

A screenshot of the 'Add New User: Test Registration' form. The form is titled 'Add New User: Test Registration' and contains the heading 'Please select an option for Test Registration'. Below the heading are three radio buttons: 'Add Test Registration to an upcoming session', 'Test Registration already attended a session', and 'No training'. A red arrow points from the text above to the first radio button. A 'Continue' button is at the bottom of the form.

How do I record training to an existing record (including one that occurred before the transition to VIRTUS)?

1. To record training when the session is not scheduled within the site, you can **click on 'Live Training' in left hand menu of the Administration Tab**, and choose 'Record Training'



- **Record training**
This function allows you to manually record training.
- **Approve training**
This function allows you to approve user training records.

Type in the User information and then select to enter into the box and then continue.

A screenshot of a web form titled "Record Training:". The main heading is "Step 1 - Select the Users:". Below it is a text input field labeled "Type the user information:". Underneath, it says "Filtered by INDIVIDUAL [Click here to change](#)". A large empty box contains the text "No Users Selected". At the bottom left is a "Continue" button.

2. Use the top sections to record a training that occurred since August 2020 under the VIRTUS curriculum.

If the session is not scheduled within the dropdown or was taken before July 31, 2020, you can enter the training session information that the user attended.

A screenshot of a web form titled "Record Training: INDIVIDUAL Users". The main heading is "Step 2 - Select the Training Session Attended:". It asks the user to "Please select the live training session that the user(s) attended from the list below:" and features a dropdown menu with "-- Please select --". Below the dropdown is a "Record attendance" button. An "OR" separator is present. Below that, it says "If you do not see the training session that the user(s) attended on the list above please enter the course, date and location for the boxes below:". There are three input fields: "Training Course" (dropdown), "Training Location" (dropdown), and "Training Date" (Month, Day, Year, and AM/PM dropdowns). A "Record attendance" button is at the bottom.

3. Select the training course from the list (usually Called to Protect), enter the location, and the training date. Click on 'Record attendance' to add the training to the user's account.

How do I create Reports within VIRTUS Online? (see Step 5 for shortcut)

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.



Quick Links

- Approve users
- Schedule a session
- [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**
- Master Report—Local level, Report to screen (previous version)
- Compliance Report
- **New Master Report (2022)**

2. The **Compliance Report** provides the most clear snapshot of the compliance status of users. Filters include Location Role and the Safe Environment required elements.

Compliance Report

Use this page to see user compliance status

First Name: Last Name: Compliant: Active:

Location: Role: Profile: Items: BGC Bulletins Documents Training

3. The **New Master Report – 2022** is essential for auditing locations and combining all the most important details into one easy to read report.

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

Filters

Location:

User Fields

- Last
- First
- Middle
- Nickname
- Salutation
- Login ID
- Email
- Account Status
- Primary Location
- Primary Location ID
- All Locations (select to)
- Roles in primary location
- All Roles
- Profile
- Position/Title
- Continuing Training Status

Background Checks

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

Manual Test: BGC

Selection: Combined

[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 combine

Code of Conduct

Hold Harmless Agreement

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

Training

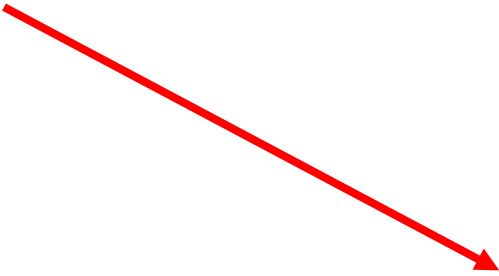
Combine all selected training types into one column - You must select the items below to combine

Live

Protecting God's Children for Adults

Protecting God's Children for Employees

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.



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: to:

Show all users*

4. The **C/D Report** assists diocesan coordinators with completing the audit reports. 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.

- Calendar of Completed 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](#)

5. **Expiring Background Checks and Training can also be quickly viewed by choosing “Click here for details” the main Administration tab.**

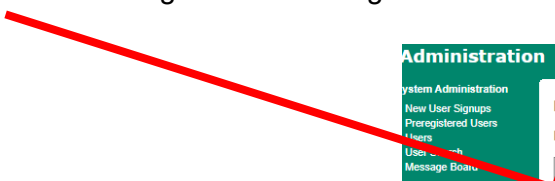
VIRTUS Online Administration for Local Administrators

- Quick Links
- Approve users
 - Schedule a session

Expiring Background Checks and Training

[Click here for details](#)

Click on number expiring to see list of users needing to renew background or training.



NOTE: This is a quick look option to see upcoming expirations. Please use the “Compliance Report” for the most accurated listing of compliance status.

Administration

System Administration

- New User Signups
- Preregistered Users
- Users
- User Search
- Message Board

Training Administration

- Training Bulletins
- Online Training Modules
- Live Training

Reports

- Compliance Reports
- User Reports
- Training Reports
- Background Checks
- Required Documents
- Location Report

Expiring Background Checks

Background checks are valid for: 5 years

Expiring in 60 Days

4

Expiring Training

Training is valid for: 5 years

Expiring in 60 Days

22

How do I merge a duplicate record?

If in doubt – please contact the Safe Environment Office to request the merge.

1. To merge a duplicate record, it is extremely important to ensure that you are confident the accounts to be merged are for the same individual—as there are many individuals who share the same name. If you're aware that there is an incorrect merge, or a merge mistake, we must be notified at the VIRTUS Helpdesk within 24 hours at 888-847-8870. Otherwise, we may not be able to retrieve the information to correct the account. **Please do not backspace after completing the merge.**
2. A potential duplicate is possible when you see **NOTE: This is a potential duplicate account.** (Click here to see potential matches) within a users account.
3. All of the potential matches should appear here. If this seems accurate, toggle “This is a duplicate” for each of the individuals and select “Continue with merge process” at the bottom of the page
4. Review the potential duplicates. You will see the full details of the accounts, and you will be able to select the “destination” account by clicking first on the “Keep this account” option located on the left. NOTE: You are maintaining one of the accounts and adding the information from the other account(s) to the destination account denoted/toggled as “Keep this account”.
5. Check the “Keep” box options on the right to select what’s maintained in the merge. Proceed by clicking on the box at the bottom of the page of “Merge Records and Review.”
6. Review all of the tabs within the individual’s profile to verify the merged records.

Administrator, Local

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

NOTE: This is a potential duplicate account.
(Click here to see potential matches)

Merge Duplicated Users

Current User	Potential Matches
<p>Name Local Administrator 6834060 User ID local_admin_test Address Daytime Phone Evening Phone Email Primary Location Carmel Mission Parish (Carmel) Training Date Training Location Registered 05/06/2020 Approved 05/06/2020</p>	<p>Name Local Administrator 6659867 User ID lerry_monterey Address Daytime Phone Evening Phone Email pneal@virtus.org Primary Location Carmel Mission Parish (Carmel) Training Date 12/16/2019 1:00 PM Training Location Sacred Heart & St. Benedict Parish (Hollister) Registered On 12/13/2017 Approved On 12/13/2017 Account Status Active User <input type="checkbox"/> This is a duplicate</p>

Continue with merge process

Keep this account

Name Local Administrator
User ID local_admin_test
Address
Daytime Phone
Evening Phone
Profile User
Primary Location Carmel Mission Parish (Carmel)
Account Status: **Active User**
Registered 05/08/2020
Approved 05/09/2020
Last Login
Live Training None
Background Checks None
Required Documents None

Module	Assigned	Started	Completed	Score	Keep
ST2_3351124 - Protect Children (CA - Monterey - STV Training Imported)	05/06/13	05/20/13	05/20/13		<input checked="" type="checkbox"/>

Keep this account

Name Local Administrator
User ID lerry_monterey
Address
Daytime Phone
Evening Phone
Profile User
Primary Location Carmel Mission Parish (Carmel)
Account Status: **Active User**
Date Registered 12/13/2017
Approved On 12/13/2017
Last Login 05/09/2020

Type	Location	Date	Status	Keep
Protecting God's Children for Adults	Sacred Heart & St. Benedict Parish (Hollister)	12/16/2019	Approved	<input checked="" type="checkbox"/>

Type	Date	Status	Keep
Department of Justice DOJ	04/24/2020	Complete	<input checked="" type="checkbox"/>

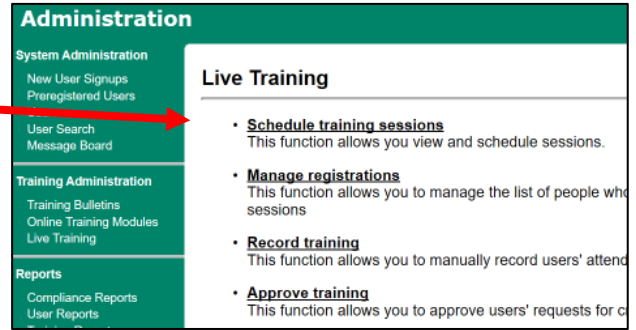
Type	Date	Keep
Driver Training Record	04/24/2020	<input checked="" type="checkbox"/>

Module	Assigned	Started	Completed	Score	Keep
ST2_2438818 - Protecting God's Children® Online Awareness Section 3.9	04/20/18	05/04/18	05/04/18		<input checked="" type="checkbox"/>

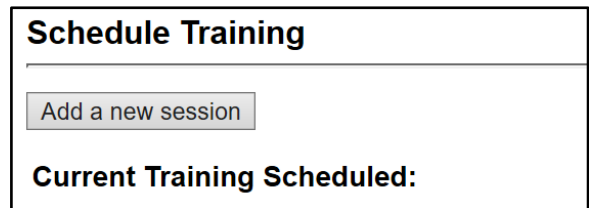
Merge records and review | Merge records and return to user list

How do I schedule and manage records for Protecting God's Children Live Sessions

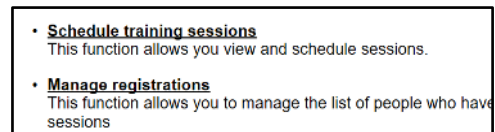
1. After selecting the "Administrator tab" select "Live Training" under the "Training Administration" tab on the left green bar. Then select "Schedule training sessions," then "Add a new session."



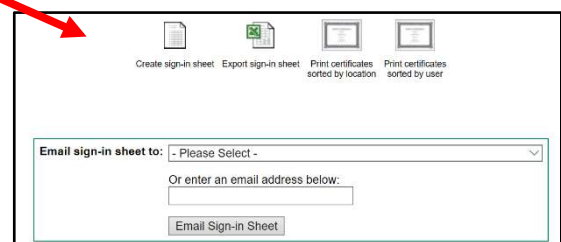
2. All the fields on this screen should be complete. The more information you have about a scheduled session the easier it will be to manage. Make sure to include instructions to where and what building the training is being held, especially where one should go once an attendee arrives on the property. This will reduce people arriving late and frustrated for not knowing where the training is held. Then click on **Add Session**.

A screenshot of the 'Add Training Session' form. It contains several fields: 'Training Title' (dropdown), 'Language' (dropdown), 'Location' (dropdown), 'Start Date' (calendar), 'Number of days' (dropdown), 'Start Time' (dropdown), 'Length' (dropdown for hours and minutes), 'Maximum Size' (text input), 'Facilitator' (optional, with 'Available Facilitators' and 'Selected Facilitators' lists), 'Contact Name' (text input), 'Contact Number' (text input), 'Contact Info' (checkbox), and 'Notes' (text area). There are also 'Add Session' and 'Back (Discard changes)' buttons at the bottom.

3. Select the "Administrator tab" and select "Live Training" under "Training Administration" on the left green bar. Then select "Manage Registrations" and "Select a Session" to manage.

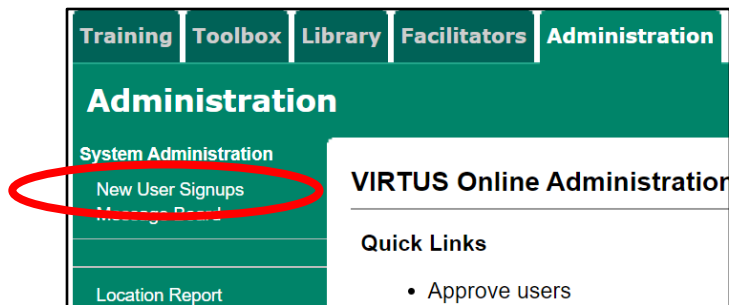


4. You may create a sign in sheet and print, export to Excel, or email the sign in sheet. It is also possible to print certificates prior to the session so they are ready to be signed, and an email reminder may be sent to the preregistered users. Facilitators can view this same screen for only the sessions they facilitate, so they can therefore perform these tasks themselves. Diocesan administrators can view all scheduled sessions.

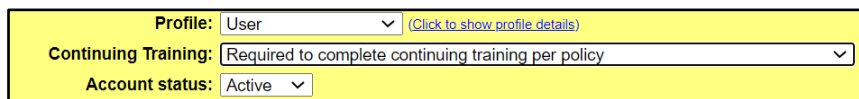
A screenshot of the 'Select A Session' screen. It shows 'Upcoming sessions' and 'Past Sessions: 2020 2019 2018'. A dropdown menu is open showing '11/24/2018 10:00 AM - (Our Lady of the Assumption Parish - Watsonville) - Protecting God's Children for Adults (Spanish)'. There is a 'Continue' button below.

How do I approve training of a record and use batch processing?

1. To approve records from a Protecting God's Children Awareness session, click on the Administration tab and click on New User Signups or Approve Users within the Quick Links. Review the sign in sheet for accuracy and completeness, so the training can be "approved."



2. Within the New User Signup link, this allows you to view the list of individuals who have preregistered for a training that has already taken place. A review of the account should include a review for account accuracy, profile and user designation, continuing training status and completion, acknowledgement of required documents, and background check submission disposition.



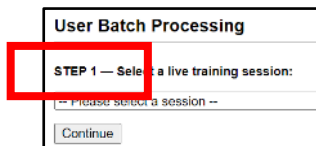
3. Once all diocesan requirements are met, the registrant is considered approved and their account can be processed by selecting "User" as the profile with an Account status as Active and then select "Process Registration."



4. **Batch processing:** Batch processing must be used with due care or it will require going back into accounts to find incorrect information and make corrections. To Batch Process, select the link on the top right of the New User Signups list and select the session in STEP 1.



5. Within STEP 2, select the user from the list of users who attended the session.



6. Within STEP 3, select the action to approve the attendees:

- Click on Approve the training records
- Select 'User' as the Profile
- Select 'These users are required to complete continuing training per policy'
- Complete the batch process

