Instructions for using VIRTUS Master Report to fill out <u>Form B</u>

There are 2 steps:

    1) Running a New Master Report (2023) to pull the information out of VIRTUS into a spreadsheet and

    2) Using that spreadsheet to fill in Form B.

Notes to keep in mind:

1) You should ensure that all your employees and volunteers with minors are "Active" in VIRTUS <u>and</u> listed under your location. Use the "Compliance Report" from the Quick Links to help make sure your list is up to date (see separate instructions on "Making Use of the Compliance Report".

2) You should only count those who have your parish designated as their <u>primary location</u>. Employees will default to primary at their place of employment. Volunteers at multiple locations should be primary at their main parish/school of service.

If you find your VIRTUS listing is not complete or you have any questions about using the Compliance or Master Reports, please reach out to Alex Kwan <u>Alex.Kwan@archden.org</u> or 303-715-2085 for assistance.

<u>Running a New Master Report 2023 from VIRTUS</u>

    Choose Administration Tab

    Choose **New Master Report (2023)** from "Quick Links"

MASTER REPORT

Choose only the location being reported

Do not select a specific Role, Profile, or Continuing Training
(or choose "All…" option)

Filters

Location:
```
-- All Locations --
Archdiocese of Denver Priests (Denver)
```

Role:
```
-- All Roles --
* Archdiocesan School Teacher, Principals, and Administrators
* Candidate for ordination
* Deacon
Deacon: Active
Deacon: Retired
* Employee
```

Profile:
```
-- All Profiles --
Administrator
Default
Educator Tab
International Priests
User
```

Continuing Training:
```
-- All Training Statuses --
Not Required
Required: Bulletins
Required: Printed
Childrens Program Only
Completed: Access
Completed: No Access
```

USER FIELDS
 	
Choose:
   o Last
   o First
   o Primary Location
   o Roles in primary location only
	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 sites)
	☑ Roles in primary location only (select to limit roles to only those in the user's primary location)
	☐ All Roles
	☐ Profile
	☐ Language

BACKGROUND CHECKS
 	
   o For Parish reports, Check only "Import: Criminal Background Check"
 	
REQUIRED DOCUMENTS
 	
   o Check "Code of Conduct"
	Background Checks
	
	☐ Combine all selected background check types into one column
	
	☑ Import: Criminal Background Check
	
	Required Documents
	
	☐ Combine all selected document types into one column
	
	☑ Code of Conduct
	☐ Hold Harmless Agreement
	☐ Volunteer Driver Agreement

TRAINING
 	
You must select/click on the option to show initial training separate from continuing.
 	
INTIAL TRAINING
 	
Choose only:
   o
   o Called to Protect for Ministries
   o Called to Protect for Parents and Families
   o OMAAP Approved Alternate Live Training
   o Protecting God's Children for Adults
	<u>I want to show initial training separate from continuing training</u>
	
	Training
	
	Initial Training
	
	The first training record from the training types selected below will appear in a single column
	
	Live
	☑ Called to Protect for Ministries
	☑ Called to Protect for Parents and Families
	☑ OMAAP Approved Alternate Live Training
	☑ Protecting God's Children for Adults
	☐ Protecting God's Children for Facilitators
	☐ Protecting God's Children for Parents

CONTINUING TRAINING o Check box "Combine all selected training types into one column o Check "Live" and "Online" choices as indicated in graphic to the right.	**Training** ☑ Combine all selected training types into one column - You must select the items below to combine **Live** ☑ Called to Protect for Ministries ☑ Called to Protect for Parents and Families ☑ OMAAP Approved Alternate Live Training ☑ Protecting God's Children for Adults ☑ Protecting God's Children for Facilitators ☑ Protecting God's Children for Parents **Online** ☑ Denver - Annual Preschool Teacher Refresher ☑ Denver - Colorado Mandated Reporter Training ☑ Denver - It Happened to Me ☑ Denver - Keeping Your Church Safe ☑ Denver - Keeping Your School Safe ☑ Denver - Meet Sam ☑ Denver - OMAAP Approved Alternate Online Training ☑ Denver - Preventing Sexual Activity Between Young Children ☐ Healthy Boundaries for Adults: Boundary Development and Implementation 1.0 ☑ Healthy Relationships for Teens 2.0 Online Module_Expansion with Safe Environment Component ☑ Protecting God's Children® Online Awareness Session 3.0 (Spanish) ☑ Protecting God's Children® Online Awareness Session 2.0 ☑ Protecting God's Children® Online Awareness Session 4.0_ ☑ Protecting God's Children® Online Awareness Session 3.0 ☐ Safe Environment Awareness Program for International Priests ☐ The Safe Environment Awareness Program for International Priests™ ☑ VIRTUS Children's Programs_Lesson Leader Orientation and Certification Training ☑ VIRTUS Children's Programs_Lesson Leader Orientation and Certification Training (Spanish) ☑ Vulnerable Adults Training Module ☑ Vulnerable Adults Training Module (Spanish) ☑ Vulnerable Adults Training Module 2.0 ☑ Vulnerable Adults Training Module 2.0 (Español)
FINAL… o (Do not click anything for "Bulletins") o Click radio button for "Show only uses who were active from: 12/31/2022 to 12/31/2022" (You will have to input dates)" o Click "Export Report to CSV" to have option to download report. o Open in Excel to view report.	○ 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: 12/312022 ▦ to: 12/31/22 ▦ (e.g. audit period) ○ Show facilitators only ○ Show local administrators only ○ Show only users who are inactive ○ Show all users (including inactive users)* [Run Report to Screen] [Export Report to CSV]

Instructions for using Master Report Spreadsheet to fill out Form B

First - sort column titled "Roles in Primary Location Only" by Employee and Volunteer and separate the lists. Apply instructions below to the two lists separately.

Section 1:

Section 1A: Enter in the COUNT of those **with** a date in Column titled "Initial Training"

Section 1B: Enter in the COUNT of those **without** a date in Column titled "Initial Training"

Section 1C: Add 1A and 1B (should equal total number of active employees or volunteers)

Section 1D: Enter the COUNT of those **with** a date in column titled "Import: Criminal Background Check"

Section 1E: Enter the COUNT of those **without** a date in column titled "Import: Criminal Background Check"

Section 1F: Enter the COUNT of those with a date **AFTER 6/28/2022** in column titled "Code of Conduct" (Note: Dates before 6/28/2022 no longer count as compliant - the employee/volunteer must sign an updated v 1.5 Code)

Section 2:

*Choose the Data Menu and select "Filter" option. to create filter drop down menu at the top of each column.*****

For2A-2C -FIRST Filter <u>Initial Training</u> column as follows:

- Check only years 2017 and prior (make sure to uncheck "blanks")

THEN:

Section 2A: Filter <u>Continuing Training</u> as below and enter COUNT of names remaining in Section 2A:

- o   Check years 2017 and earlier
- o   Check 2022
- o   Check "(blanks)"

Section 2B: Filter <u>Continuing Training</u> as below and enter COUNT of names remaining in Section 2B:

- o   Check 2022 (and 2023 if applicable due to catching up)

Section 2C:

- o   Difference of 2A-2B

****For Section 2D and 2E REMOVE ALL PREVIOUS FILTERS TO <u>INITIAL AND CONTINUING TRAINING</u> Columns****

Section 2D - Total count once filter below applied to column "<u>Import: Criminal Background Check</u>"

- o   Check 2022
- o   Note – this will count initial new hire backgrounds from that year. It is fine to leave in, or you can subtract out manually

Section 2E - Total count once filter below applied to column "<u>Import: Criminal Background Check</u>"

- o   Check all years 2017 and earlier
- o   Do NOT Check "(blanks)"