

Making Use of the Compliance Report on VIRTUS Online

The Compliance Report allows administrators to quickly and comprehensively manage Safe Environment records:

- 1) **LIST MANAGEMENT:** This is the most comprehensive way to confirm that your VIRTUS list accurately reflects the active employees and volunteers at your location.
 - a. You can easily inactivate those who are no longer serving at your parish.
 - b. If someone is missing, now is the time to get them added/activated for your location.
- 2) **CHECKING COMPLIANCE** – Red circles indicate missing compliance items and the last column indicates the specific items missing. If you have documentation of these items elsewhere, please update them in VIRTUS. If they are missing items, please instruct them on how to get them completed ASAP.

The instructions below will help get you started, but please reach out for training on more specific needs!

How to Access of the Compliance Report

- Administration Tab in VIRTUS Online
- Choose “Compliance Report” from list under “Main Reports” on main screen

VIRTUS Online Administration for Local Administrators

Main Reports

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

Filtering Notes

Location: If you are administrator of multiple locations, you may want to filter by one location at a time

Role: Can view all or filter by individual roles. Please note report will pull anyone who has that role in any location. I.e. you may see your volunteer show up on a report pulling employees if that person is an employee elsewhere.

Profile: Leave as “All”

Compliant : Choose “Any” to see all your active users. Choose “No” to only see those missing compliance items

Items: Choose any or all items to see list of those compliant or not compliant in those items.

BGC- Background Check within 5 years

Documents – Code of Conduct signed 6/28/2022 or after

Training – Will note if missing initial or refresher training within 5 years

Bulletins – Not applicable in the Archdiocese of Denver

Run Report: click to see names on screen

Export: Click to export as a spreadsheet and further work with list management and compliance.

Any name on the list can be clicked on to open that user record to make any necessary updates.

Please note – Updates made to a user’s record can take up to 24 hours to reflect correctly in the compliance icons