How to Record Safe Environment Items in VIRTUS
Best Practices

Code of Conduct –

- Valid only if signed after 6/28/2022 (v 1.5 or later). Please use most recent version (1.6 in 2023).
- If valid version, no need to re-sign until Vicar General announces new *substantive* version.
- If Code is signed online in VIRTUS (indicated by "Self-Registration" or "User via Prompt" in "Recorded" column"), the administrator does not need to do any additional recording.
- Versions signed online are valid across AOD.
- Versions signed in hard copy are only valid at parish with the hard copy.
- Use the **"Force a Required Document Prompt"** under an individual user's "Required Documents Tab" prompt them to log in and sign the new Code of Conduct online.

Recording:

- ➢ Go to User Contact Record
- ➢ Click Required Documents Tab
- ➢ "Record a document for this user"
- ➢ In "Recorded By" field, remove your name and note your location (if a hard copy) or "PayCom" if signed in PayCom.

Document Retention:

- ✓ No hard copies necessary if signed within VIRTUS or signed within PayCom (and recorded in VIRTUS)
- ✓ Code Signatures not recorded by "Self Registration" or "User via Prompt" should be maintained in both hard copy **and** date recorded in VIRTUS.

Background Check

- Must be current as of the last 5 years
- Parishes and schools must have access to a copy of all background checks in their Selection account. Notation in VIRTUS is not sufficient to meet auditor and legal requirements.
- If a background check has been run by another parish in the last 5 years, it *may* be possible to share that check with a different parish. Contact OMAAP to confirm.
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Recording:

- ➢ Go to User Contact Record
- ➢ Background Checks Tab
- ➢ "Record a Background check for this user"
- ➢ "Run By" should indicate service used (Selection or other) (*remove your name*)
- ➢ Results Location" should indicate your location

Document Retention:

- ✓ Background checks conducted through Selection.com/Fastrax (since 2/2018) do not need to have hard copies in files.
- ✓ Background checks not conducted in Selection.com or previous to 2/2018 must be in hard copy form in church worker's file.

Safe Environment Training

- Every employee and volunteer with minors must have an initial **live** training (Called to Protect for Parents and Families or Protecting God's Children) documented
- Must have been renewed within the last 5 years to be valid.
- After initial live training, online training is possible.

Recording of a training taken before August 2020.

- ➢ Go to Administration tab
- ➢ "Live Training" in left menu
- ➢ "Record Training"
- ➢ "Step 1" Select Individual User(s)
- ➢ "Step 2" Select Training Session (use bottom portion for all classes prior to 8/1/2020)

Recording of a Protecting God's Children training after August 2020

- ➢ If credit is missing for a PGC class given since August 2020, it is likely the person did not properly register for the PGC class and will need to create an account now.
- ➢ Contact OMAAP to confirm attendance from the sign in sheet in order to give credit.

Document Retention:

- ✓ If initial live class and any refresher classes are documented in VIRTUS, no need to keep hard copies of certificates.
- ✓ Starting in August 2020 with the switch to VIRTUS, attendance is confirmed online and certificates are no longer being regularly issued.
- ✓ Individuals have access to their own certificates online through the "Compliance Summary" button on the Home tab of their individual VIRTUS account.

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