

Instructions for using VIRTUS Master Report to fill out Form B

There are 2 steps:

- 1) Running a Master Report 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 and 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 primary location. Employees will default to primary at their place of employment. Volunteers at multiple locations should be primary at their main parish/school of service. Using these instructions below will ensure you are only including those who have your location as a primary.

If you find your VIRTUS listing is not complete or updated, this Master Report will not be accurate. To maintain the integrity of the reporting, please update your VIRTUS records first before running your reports.

Reach out to Alex Kwan Alex.Kwan@archden.org or 303-715-2085 if you need suggestions on how to tackle updating your VIRTUS compliance records.

Running a Master Report from VIRTUS

Choose Administration Tab

Choose **Master Report** under “Main Reports” listing on the main page

MASTER REPORT

From the “Saved Reports” Choose:
– Form B Reporting2024a

This will fill in the appropriate “User Fields”

Master Report

Saved Reports [manage](#)

FILTERS:

Location: Choose only the location being reported (parish)

Role: Choose “--All Roles--” to run one report and filter by role later
or
Choose “Employee” or “Volunteer” and then run the report again with the other role. .

Profile: Choose --All Profiles--

Continuing Training: Choose “Required: Per Policy”

Filters

Location:

Role:

Profile:

Continuing Training:

USER FIELDS

- The required fields are filled in
- If you would like additional information in your report, click the desired boxes.

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
REQUIRED DOCUMENTS**

- The required fields are filled in

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

<p>TRAINING</p> <p>INITIAL TRAINING CONTINUING TRAINING</p> <p>The correct options are already filled in.</p> <p>*Do not change any of the selections in this section.*</p>	<p>Initial Training</p> <p>The first training record from the training types selected is</p> <p>Live</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Called to Protect for Ministries <input checked="" type="checkbox"/> Called to Protect for Parents and Families <input checked="" type="checkbox"/> OMAAP Approved Alternate Live Training <input checked="" type="checkbox"/> Protecting God's Children for Adults <input type="checkbox"/> Protecting God's Children for Facilitators <p>Live</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Called to Protect for Ministries <input checked="" type="checkbox"/> Called to Protect for Parents and Families <input checked="" type="checkbox"/> OMAAP Approved Alternate Live Training <input checked="" type="checkbox"/> Protecting God's Children for Adults <input type="checkbox"/> Protecting God's Children for Facilitators <p>Online</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Denver - Annual Preschool Teacher Refresher <input checked="" type="checkbox"/> Denver - Colorado Mandated Reporter Training <input checked="" type="checkbox"/> Denver - It Happened to Me <input checked="" type="checkbox"/> Denver - Keeping Your Church Safe <input checked="" type="checkbox"/> Denver - Keeping Your School Safe <input checked="" type="checkbox"/> Denver - Meet Sam <input checked="" type="checkbox"/> Denver - OMAAP Approved Alternate Online Training <input checked="" type="checkbox"/> Denver - Preventing Sexual Activity Between You <input type="checkbox"/> Healthy Boundaries for Adults: Boundary Development <input type="checkbox"/> Healthy Relationships for Teens 2.0 Online Module <input type="checkbox"/> Healthy Relationships for Teens 2.0 with Safe Environment <input type="checkbox"/> Protecting God's Children Online Awareness Session <input type="checkbox"/> Protecting God's Children Online Awareness Session <input type="checkbox"/> Protecting God's Children® Online Awareness Session <input type="checkbox"/> Protecting God's Children® Online Awareness Session <input type="checkbox"/> Protecting God's Children Online Awareness Session <input type="checkbox"/> Safe Environment Awareness Program for Intern <input type="checkbox"/> The Safe Environment Awareness Program for Intern <input checked="" type="checkbox"/> VIRTUS Children's Programs_Lesson Leader Orientation <input checked="" type="checkbox"/> VIRTUS Children's Programs_Lesson Leader Orientation <input checked="" type="checkbox"/> Vulnerable Adults 2.0 <input checked="" type="checkbox"/> Vulnerable Adults 2.0 - Spanish <input checked="" type="checkbox"/> Vulnerable Adults Training Module <input checked="" type="checkbox"/> Vulnerable Adults Training Module (Spanish) <input checked="" type="checkbox"/> Vulnerable Adults Training Module 2.0 <input checked="" type="checkbox"/> Vulnerable Adults Training Module 2.0 (Español)
<p>BULLETINS</p> <ul style="list-style-type: none"> <input type="radio"/> Ignore - Do not click box 	
<p>USERS TO SHOW</p> <ul style="list-style-type: none"> <input type="radio"/> The standard "Show users who were active any time from: 12/31/2023 to 12/31/2023" is correctly chosen. <input type="radio"/> If in the process of updating your VIRTUS list, you have added users since 12/31/23, you should change the ending date to the day you run the report. 	<p>Users to Show</p> <ul style="list-style-type: none"> <input type="radio"/> Show only users who are currently active <input type="radio"/> Show only users who are currently active (including pending users) <input type="radio"/> Show only users who are currently pending <input checked="" type="radio"/> Show users who were active any time from: 12/31/2023  to: 12/31/2023 
<p>SAVE REPORT (Optional)</p> <ul style="list-style-type: none"> <input type="radio"/> Change name to a customized name so that the original template remains and you have your customized report saved as well. . <p>Click "Export Report to CSV" to have option to download report.</p> <ul style="list-style-type: none"> <input type="radio"/> Open in Excel to view report. 	

Instructions for using Master Report Spreadsheet to fill out Form B

If you chose “—All Roles—, you will need to 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 6/27/2022** in column titled “Code of Conduct”
(Note: Dates before 6/27/2022 are no longer compliant)

Section 2:

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

For 2A-2C -FIRST Filter Initial Training column as follows:

- Check only years 2018 and earlier ONLY – UNCHECK “blanks”

THEN:

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

- Check years 2018 and earlier
- Check 2023
- Check “(blanks)”

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

- Check 2023 (and 2024 if applicable due to catching up)

Section 2C: Enter Difference of 2A-2B

OR

- Filter by checking years 2018 and earlier only – then enter COUNT of names in 2C

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

Section 2D – Filter column “Import: Criminal Background Check” as below and enter COUNT in 2D

- Check 2023
- 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 – Filter column “Import: Criminal Background Check” as below and enter COUNT in 2E

- Check all years 2018 and earlier
- Do NOT Check “(blanks)”