

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:

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.

- 1) Ensure that all your *parish* 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 before running the Master Report (see separate instructions on “Making Use of the Compliance Report”).
- 2) Only count users who have your parish designated as their primary location in VIRTUS. 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 automatically ensure you are reporting only those with your location as a primary.*

Reach out to Alex Kwan Alex.Kwan@archden.org or 303-715-2085 for assistance in getting you VIRTUS records updated.

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 Reporting2025

This will fill in the appropriate “User Fields”

Master Report

Saved Reports [manage](#)

FILTERS:

Location: Choose only the location being reported (parish)

Role:

Choose “Employee” or “Volunteer” and run report 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
DO NOT CHANGE

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

<div>TRAINING</div> <div>INITIAL TRAINING CONTINUING TRAINING</div> <div>The correct options are already filled in.</div> <div>*Do not change any of the selections in this section.*</div>	<div><div>Initial Training</div><div>The first training record from the training types selected I</div><div>Live</div><div><div><input checked="" type="checkbox"/> Called to Protect for Ministries</div><div><input checked="" type="checkbox"/> Called to Protect for Parents and Families</div><div><input checked="" type="checkbox"/> OMAAP Approved Alternate Live Training</div><div><input checked="" type="checkbox"/> Protecting God's Children for Adults</div><div><input type="checkbox"/> Protecting God's Children for Facilitators</div></div></div> <div><div>Live</div><div><div><input checked="" type="checkbox"/> Called to Protect for Ministries</div><div><input checked="" type="checkbox"/> Called to Protect for Parents and Families</div><div><input checked="" type="checkbox"/> OMAAP Approved Alternate Live Training</div><div><input checked="" type="checkbox"/> Protecting God's Children for Adults</div><div><input checked="" type="checkbox"/> Protecting God's Children for Parents</div></div></div> <div><div>Online</div><div><div><input checked="" type="checkbox"/> Denver - Annual Preschool Teacher Refresher</div><div><input checked="" type="checkbox"/> Denver - Colorado Mandated Reporter Training</div><div><input checked="" type="checkbox"/> Denver - It Happened to Me</div><div><input checked="" type="checkbox"/> Denver - Keeping Your Church Safe</div><div><input checked="" type="checkbox"/> Denver - Keeping Your School Safe</div><div><input checked="" type="checkbox"/> Denver - Meet Sam</div><div><input checked="" type="checkbox"/> Denver - OMAAP Approved Alternate Online Trai</div><div><input checked="" type="checkbox"/> Denver - Preventing Sexual Activity Between You</div><div><input type="checkbox"/> Healthy Boundaries for Adults: Boundary Develo</div><div><input type="checkbox"/> Healthy Relationships for Teens 2.0 Online Modu</div><div><input type="checkbox"/> Healthy Relationships for Teens 2.0 with Safe En</div><div><input type="checkbox"/> Protecting God's Children Online Awareness Ses</div><div><input type="checkbox"/> Protecting God's Children Online Awareness Ses</div><div><input type="checkbox"/> Protecting God's Children® Online Awareness S</div><div><input type="checkbox"/> Protecting God's Children® Online Awareness S</div><div><input type="checkbox"/> Protecting God's Children Online Awareness Ses</div><div><input type="checkbox"/> Safe Environment Awareness Program for Intern</div><div><input type="checkbox"/> The Safe Environment Awareness Program for Ir</div><div><input checked="" type="checkbox"/> VIRTUS Children's Programs_Lesson Leader Or</div><div><input checked="" type="checkbox"/> VIRTUS Children's Programs_Lesson Leader Or</div><div><input checked="" type="checkbox"/> Vulnerable Adults 2.0</div><div><input checked="" type="checkbox"/> Vulnerable Adults 2.0 - Spanish</div><div><input checked="" type="checkbox"/> Vulnerable Adults Training Module</div><div><input checked="" type="checkbox"/> Vulnerable Adults Training Module (Spanish)</div><div><input checked="" type="checkbox"/> Vulnerable Adults Training Module 2.0</div><div><input checked="" type="checkbox"/> Vulnerable Adults Training Module 2.0 (Español)</div></div></div>
---	--

Instructions for using Master Report Spreadsheet to fill out Form B

Use these instructions for each of the reports run for employees and for volunteers separately.

Section 1

Section 1A	Enter in total number of employees or volunteers on the spreadsheet
Section 1B	Enter in the COUNT of those with a date in Column titled "Initial Training"
Section 1C	Enter in the COUNT of those without a date in Column titled "Initial Training"
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 ON or AFTER 7/1/2022 in column titled "Code of Conduct"
Section 1G	Enter the COUNT of those with a date BEFORE 7/1/2022 in column titled "Code of Conduct" Note: Dates before 7/1/2022 are not compliant

Section 2

*****First from the Data Menu, select "Filter" to show the drop down menu arrows at the top of each column.*****

Section 2A-2C	
FIRST Filter <u>Initial Training</u> column by: <ul style="list-style-type: none"> • Check years 2019 and earlier ONLY – UNCHECK "blanks" 	
Section 2A	Filter <u>Continuing Training</u> as below and enter COUNT of remaining names in Section 2A: <ul style="list-style-type: none"> ○ Check years 2019 and earlier ○ Check 2024 ○ Check "(blanks)"
Section 2B	Filter <u>Continuing Training</u> as below and enter COUNT of names remaining in Section 2B: <ul style="list-style-type: none"> ○ Check 2024 (and 2025 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

Section 2D -2F	
REMOVE ALL PREVIOUS FILTERS TO <u>INITIAL AND CONTINUING TRAINING</u> Columns	
Section 2D	Enter in sum of 2E plus 2F
Section 2E	Filter column " <u>Import: Criminal Background Check</u> " as below and enter COUNT in 2E <ul style="list-style-type: none"> ○ Check 2024 ○ Note – this will also count initial new hire backgrounds from the year; it is fine to count these.
Section 2F	Filter column " <u>Import: Criminal Background Check</u> " as below and enter COUNT in 2F <ul style="list-style-type: none"> ○ Check all years 2019 and earlier ○ Do NOT Check "(blanks)"