A PROGRAM AND SERVICE OF
THE NATIONAL CATHOLIC RISK RETENTION GROUP, INC.

⊞VIRTUS®*Online*

Safe Environment Coordinators Website Guide

VIRTUS® Excellence Builds Trust

Log in to your VIRTUS account at www.virtus.org to review the functionalities of the VIRTUS Platform.

(To inquire about your specific access, communicate with your Diocesan Safe Environment Compliance Coordinator.)

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How do I view my own location's employees and volunteers who have online registrations within VIRTUS Online?

1. Select the "Administration" tab from the tabs at the top of the page;
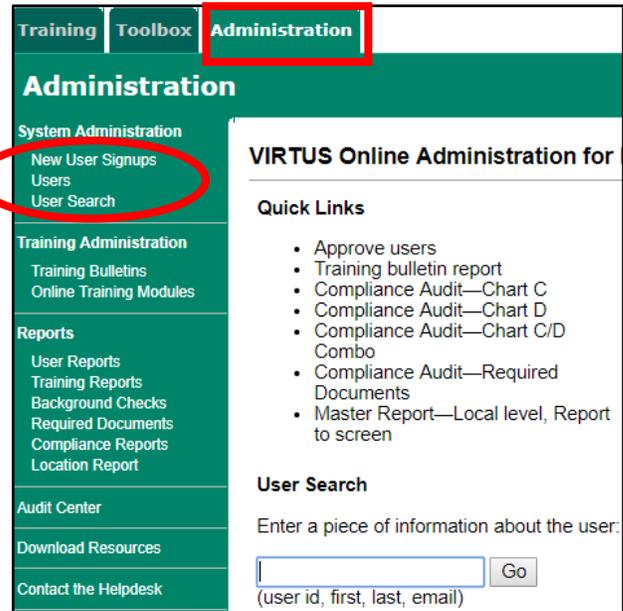
2. Click on a category under "System Administration" within the left-hand menu. One possible selection is "Users"

3. The employees and volunteers for your affiliated location(s) will be listed in alphabetical order by last name. You can also search in the Search box for individual users, then select "Search". If a particular individual is missing from your list:
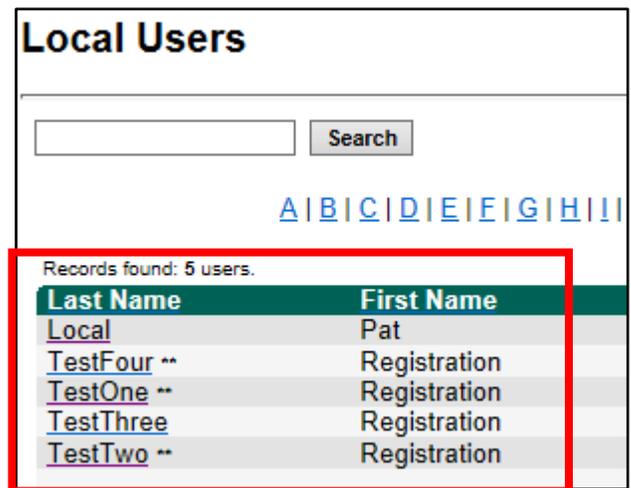
   a. First, double check other possibilities of name spellings, including hyphenated last names and nicknames.

   b. Additionally, the person may not have registered online, or they may have registered themselves with a different location within your organization.

      Note: Within this section, you, as a Safe Environment Coordinator, will only be able to see individuals who have affiliated themselves with your location(s).

How do I search the entire organization to view if a particular person has an online registration, and make changes to their account and/or affiliate them with my location?

1. Select the "Administration" tab from the tabs at the top of the page;

2. Search in the Search box for individual users, or click on the User Search in the left-hand side of your screen, then select "Go". For searching tips:

   a. Insert the letters of the individual's last name, first name, user id **or** the email address. Each one of these items must be searched separately and cannot be combined into one individual search (i.e., "John Smith" must either be searched as "John" or "Smith").

   b. Searching with the first several letters of the last name usually yields the best and largest scope of results (i.e., search "Smi" rather than just "Smith").

   c. If a particular individual is missing, double check other possibilities of name spellings, including hyphenated last names and nicknames. It is also best to search more than once for the same person using a different search query.

3. If a match is found, then click on the person's last name to view their account

4. To assist an individual to recover their username and password, you can inform the individual of his/her User ID and request that the individual use the password recovery function on the homepage of www.virtus.org.

5. Please contact the Diocesan Safe Environment Coordinator of any updates needed to an individual's account.
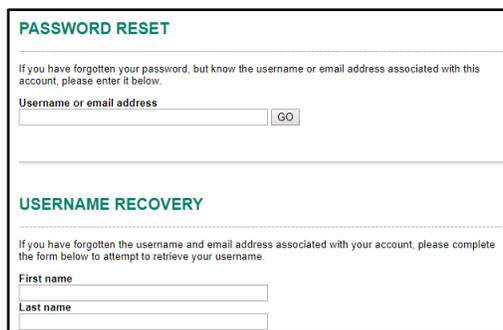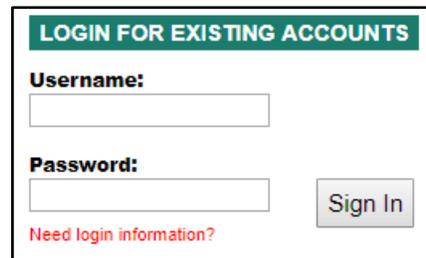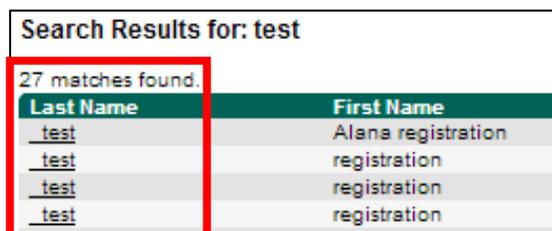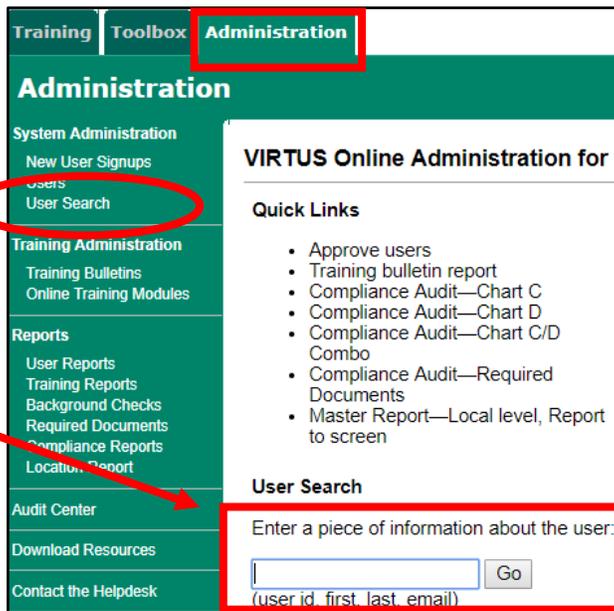
How do I create a Master Report within VIRTUS Online?

1. Various reports exist that can be created within VIRTUS Online. One report is the Master Report. A Master Report generated by a Safe Environment Coordinator will actually be a local master report that provides information only about the locations that are specifically affiliated with the Safe Environment Coordinator's account. To begin, select the "Administration" tab from the tabs at the top of the page.
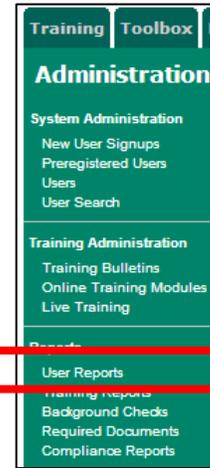
2. Click on a category under "Reports" within the left-hand menu. One possible selection is "Compliance Reports". Then, select the type of report you would like to peruse—one possible selection would be the "Master Report".

   Or, please click on the quick link labeled "Master Report – Local level, Report to screen"
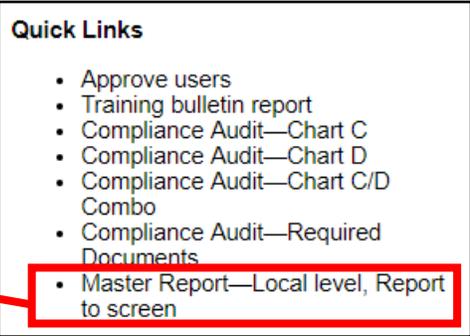
3. Select the specific location (the system will only allow one location to be selected at a time) and the desired parameters of the report. The Safe Environment Coordinator will be able to:
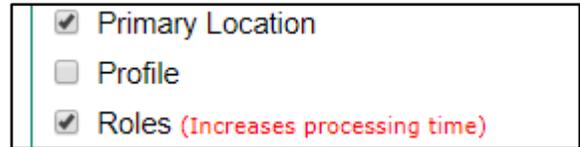
   a. Continue to select the desired parameters of the report, including the checked boxes shown here for 'User Fields to Display' and 'Compliance Fields to Display'.
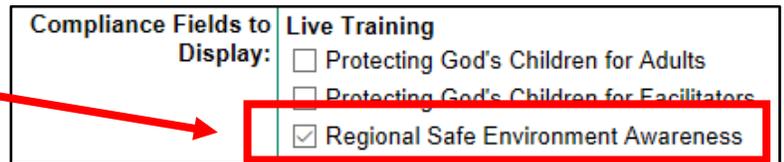
   b. Choose to run the report directly to the screen where the ability exists to drill into a user's record or populate the report into Excel (populating the report into Excel allows the report to be saved onto the Safe Environment Coordinator's computer and allows the person to sort the data, and first 'save as' an Excel document).

How do I review an account to see if a background check and training are completed on the individual record?

1. In order to review an account's main profile page, the Safe Environment Coordinator [Local Administrators] must first search for the user and click on the person's name to open up the profile. If the Safe Environment Coordinator is having difficulties locating an individual who has an account, please view the section in this document entitled, *"How do I view my own location's employees and volunteers who have online registrations within VIRTUS Online"?*

   Once the user is selected, an approved record will have all of the following tabs associated within the account.
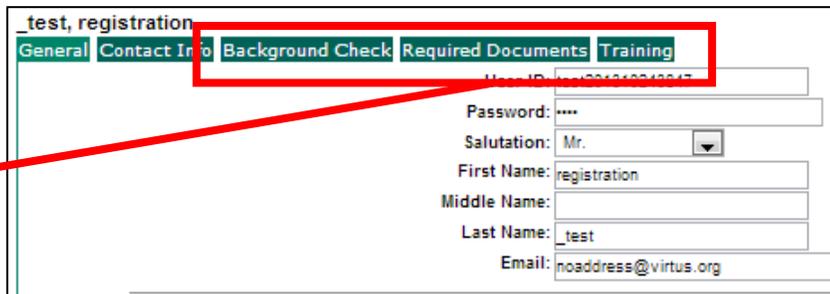
   a. To view the Background Check, select the "Background Check" tab to view the background check data and the answers to the questions asked during the registration process.

   b. To view the training, select the Training tab. It will show the attendance of training and the ability to print a certificate.