



# Local Administrator Website Guide

(November 30, 2022)

## DIOCESE OF JOLIET



### **Frequently Asked Questions:**

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Log in to your VIRTUS account at [www.virtus.org](http://www.virtus.org) to review the functionalities of the VIRTUS Platform.

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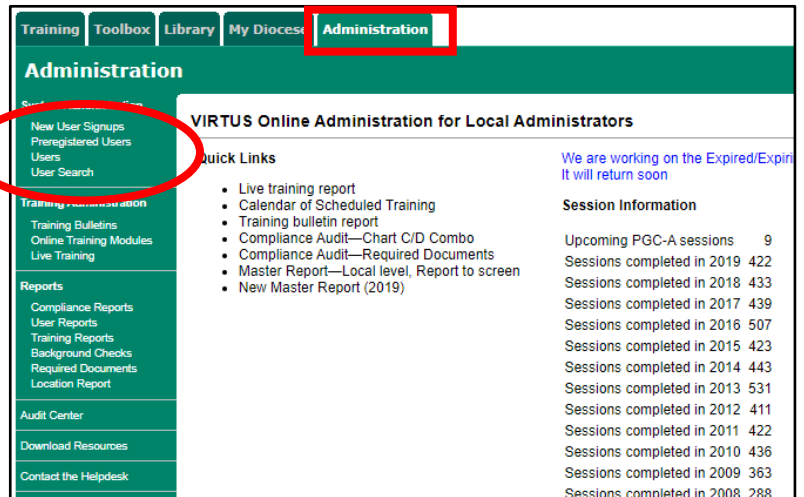
*Administrative Assistant to the Director, Child and Youth Protection*

815-221-6118

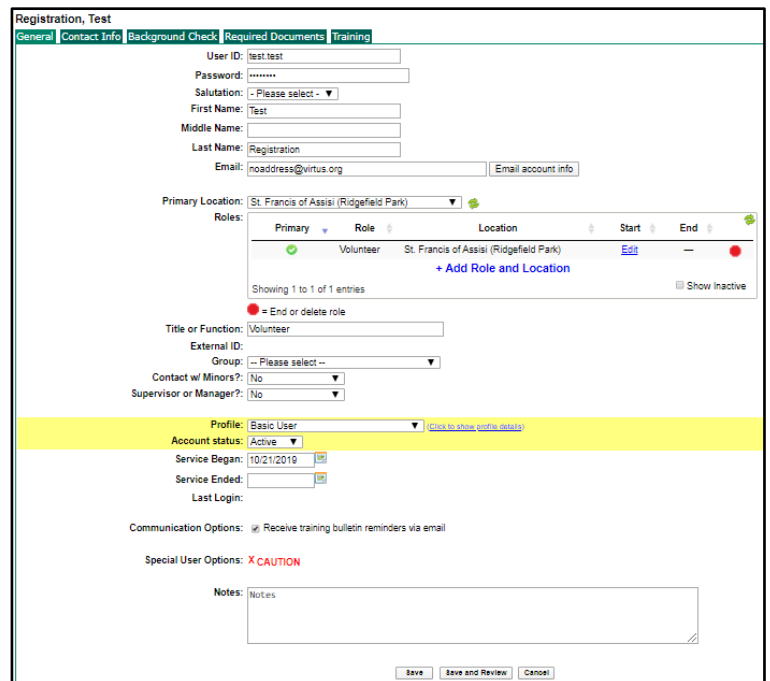
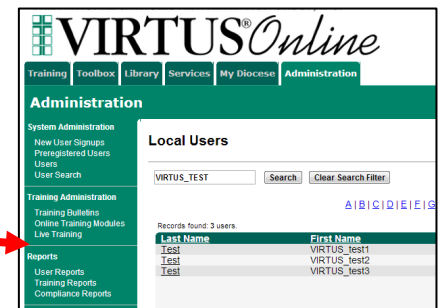
[mturone@dioceseofjoliet.org](mailto:mturone@dioceseofjoliet.org)

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

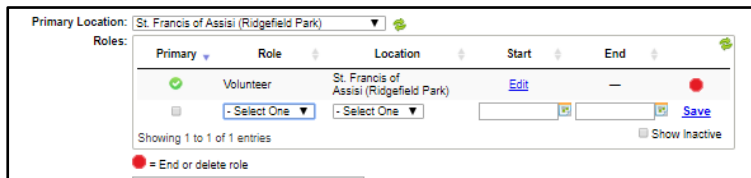
1. Select the "Administration" tab from the tabs at the top of the page:
  - a. New User Signups – indicates that the Protecting God's Children (PGC) training session has past and the user is awaiting approval by the Office of Child and Youth Protection (OCYP).
  - b. Preregistered Users – indicates that the user registered for an upcoming PGC session **\*currently, there are no in-person PGC trainings conducted in the Diocese of Joliet**
  - c. Users – indicates the list of users within the local administrator's location(s)



2. 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 "User Search" and place a check mark within the "Show inactive users" box. If an 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.
  - c. If the user is listed within your location(s), you will have the ability to edit information within the General Tab, such as User ID, Name, Email, Location and Role, and then select Save or Save and Review.
  - d. To fully inactivate a record, please click on the Inactive selection from the dropdown within Account status.
  - e. If a **Caution** appears in the Special User Options, please contact OCYP to determine the issue. The issue may appear in the Notes section.

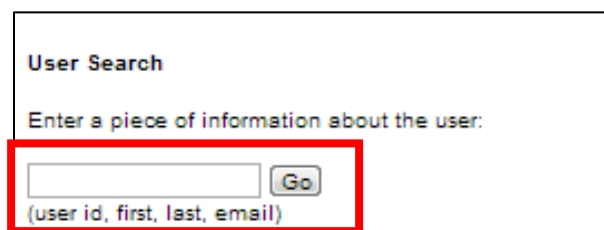
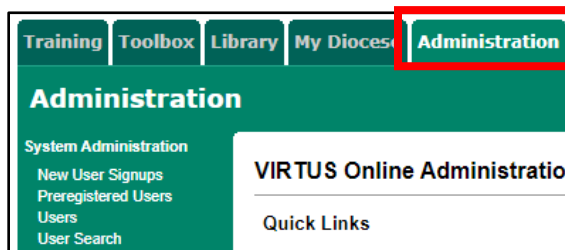


- f. To update Location and Role, click on **Add Role and Location** and select Role, Location and Start Date (if unknown, leave blank or put the date you enter the update) and **Save**. To inactivate a Role/Location, click on the red **stop sign** to inactivate or delete if it is an incorrect selection. The green check signifies the primary location and role.



## 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, 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

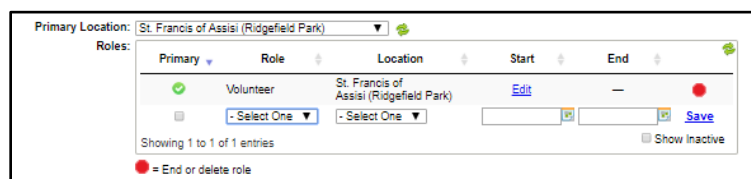


**Search Results for: test**

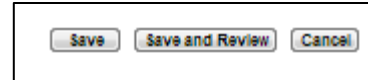
27 matches found.

Last Name	First Name
test	Alana registration
test	registration
test	registration
test	registration

**Note:** Within the searched person’s account page, the local administrator will not be able to make/save any changes if the person’s Primary Location or Additional Location(s) do not match the local administrator’s location. In this case, the local administrator should communicate with OCYP to request that the individual’s account be updated with the appropriate affiliated location.



If the searched person's "Primary" or "Additional" locations match the administrator's, then the local administrator will be able to update/save changes to their account, including the ability to change the person's "Profile," "Email Address," etc.

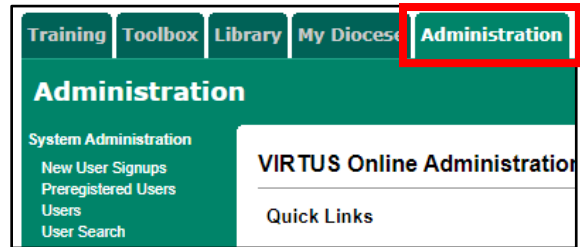


4. If a match is **not** found, it may be that the person did not create an online registration and still needs to create one. Or it may be that the user has a VIRTUS account with a different diocese

# How do I assist with recovering an individual's username or password as a local administrator?

1. The local administrator may assist with recovering the username/password only for accounts that already exist

First, search the database to find the online account by reviewing the instructions listed within this document under the section entitled, *“How do I search the entire organization to view if a particular individual has an online registration, make changes to their account and/or affiliate them with my location?”*



2. Once the account is located, click on the last name to pull up the profile information

- a. If the local administrator shares the same “Primary” or “Additional” location as the individual, then the administrator can ask the system to send the individual his/her user ID and password

- i. First, the local administrator should check that the email listed within the account is accurate
- ii. If the email is not accurate, then the administrator should update the email address and select “Save and Review” at the bottom of the page
- iii. Once the email is updated and correct, select “Email account info,” and ask the individual to retrieve the message from their email account and proceed accordingly

User ID:	test201909261226
Salutation:	Mr.
First Name:	Registration
Middle Name:	
Last Name:	Test
Email:	noaddress@virtus.org

Email account info

- b. If the local administrator does not share the same “Primary” or “Additional” location as the individual, the local administrator can only inform the individual of his/her User ID and request that the individual use the password

## How do I review an account for compliance – to see if a background check, required document, and/or training was completed?

1. Search for the user and click on the person's name to open up the profile.
2. Edits can be made to the **General** and **Contact Info** Tabs. Within the Primary Location box should be the users primary location. To update Location and Role, click on **Add Role and Location** and select Role, Location and Start Date and **Save**. To inactivate a Role/Location, click on the red **stop sign** to inactivate or delete if it is an incorrect selection. The green check signifies the primary role. To edit, **Click** on the designated Role, Location or Date.

The screenshot shows the user profile page with the 'Background Check' tab highlighted in red. The user ID is local.administrator657. The primary location is Athens - St. Edward (Athens). There are two roles listed: a primary role as a Volunteer at Athens - St. Edward (Athens) starting on 06/03/2022, and another role as a Volunteer at Atlanta - St. Catherine (Atlanta).

3. The **Background Check** information will appear with the **Background Check Tab**.

The screenshot shows the 'Background Check' tab with the 'Background Check' header highlighted in red. It displays a table of background screening records.

Date	Type & Provider	Name Submitted	Run By	Report Location	Comments	Private Comments	Complete	Edit
06/01/2022	Volunteer ISP	Test Record					Yes	

The **Required Documents** that are electronically acknowledged will appear within the **Required Documents Tab**.

The screenshot shows the 'Required Documents' tab with the 'Required Documents' header highlighted in red. It displays a table of required documents.

Document	Date Acknowledged	Recorded By	Comments	Edit
Code of Ethics and Integrity for Conduct of Church Personnel	06/01/2022			

The **training information** will appear within the **Training Tab**, and the ability exists to print the training certificate by clicking on the certificate icon.

The screenshot shows the 'Training' tab with the 'Training' header highlighted in red. It displays a table of training records.

Training	Location	Assigned	Started	Completed	
Protecting God's Children for Adults	Athens - St. Edward (Athens)	N/A	N/A	06/01/22	

Below the table are links: "Add this user to an upcoming LIVE session", "Add this user to a past LIVE session", and "Assign ONLINE training to this user".

- a. If training bulletins need to be adjusted, please contact OCYP.
- b. To assign online training, such as SHPT, please contact OCYP.

To view **compliance status** and review a summary of the compliance items, please click on the **Summary Tab**.

- a. You can review the most recent training, background check and required document status.
- b. The **Compliance Status** will note "Compliant" or "Non-compliant" where non-compliant identifies missing compliance items.

The screenshot shows the 'Summary' tab with the 'Summary' header highlighted in red. It displays a summary of the user's compliance status.

**General Information**

Primary Location: Athens - St. Edward (Athens)

Athens - St. Edward (Athens) - Volunteer ✓

Locations and Roles: Atlanta - St. Catherine (Atlanta) - Volunteer

Profile: User

**Most Recent Training**

Training	Date
Protecting God's Children for Adults	06/01/2022

**Most Recent Completed Background Check**

Background Check	Date
ISP - Volunteer	06/01/2022

**Most Recent Required Document**

Document	Date
Code of Ethics and Integrity for Conduct of Church Personnel	06/01/2022

The screenshot shows the 'Summary' tab with the 'Compliance Status' highlighted in green as "Compliant".

- c. If you see a CAUTION notification on a user's account, please contact OCYP.

General	Contact Info	Private	Background Check	Required Documents	Training	Summary
Compliance Status: <b>Not compliant</b> Missing: BGC, Code						
General Information						

## How do I create Reports within VIRTUS Online?

1. There are various reports that can be created using VIRTUS Online. To begin, select the "Administration" tab from the tabs at the top of the page. Then choose a report within Quick Links. The reports can be viewed on the screen or exported to a CSV file and saved in Excel format.

Run Report to Screen
Export Report to CSV

**Quick Links**

- Live training report
- Calendar of Scheduled Training
- Training bulletin report
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Activity Report by Location
- Activity Report by User
- Renewal Report
- Master Report - User Level Report to screen (previous version)
- **New Master Report (2022)**

2. The **New Master Report – 2022** is essential for auditing locations and combining all the most important details into one easy to read report is the New Master Report.

This report allows coordinators to filter user requirements revealing only the most recent dates of completion. This report offers you the flexibility of combining or listing requirements separately.

In addition to filtering locations and/or roles, the new master report can filter users who are currently active, active and pending, or reveal all users active and inactive for a location. This is very helpful as an end of year report for locations.

**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 locations)
- Roles in primary location only (select to limit to primary location)
- All Roles
- Profile
- Language
- Position/Title
- Facilitator Tab
- Educator Tab
- Continuing Training Status
- Contact with minors
- Contact with vulnerable adults
- Address
- Address 2
- City
- State
- ZIP
- Daytime Phone
- Evening Phone
- Group
- Approval Date

**Background Checks**

Combine all selected background check types into one column - You must select the items below to combine

- Background Check: Background Check Package
- Import: Premium-3yr rescreen
- ISP: Employee
- ISP: Employee plus MVR
- ISP: Motor Vehicle
- ISP: Rescreening
- ISP: Volunteer

[I want to show another background check grouping](#)

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**Required Documents**

Combine all selected document types into one column - You must select the items below to combine

- Code of Ethics and Integrity for Conduct of Church Personnel
- Policies: Catholic Diocese of Tyler (ENG) (inactive)
- Policy on Conduct of Church Personnel - Diocese of Tyler (ENG) (inactive)

[I want to HIDE the initial training section](#)

**Initial Training**

The first training record from the training types selected below will appear in a single column

**Live**

- Creating a Safe Environment (CASE) - In-Person Training
- Protecting God's Children for Adults
- Protecting God's Children for Facilitators
- Protecting God's Children for Parents

**Online**

- A Plan to Protect God's Children 4.0
- A Plan to Protect God's Children 4.0 (Español)
- Protecting God's Children® Online Awareness Session 4.0
- Protecting God's Children® Online Awareness Session 4.0 (Español)

**Continuing Training**

Combine all selected training types into one column - You must select the items below to combine

**Live**

- Creating a Safe Environment (CASE) - In-Person Training
- Protecting God's Children for Adults
- Protecting God's Children for Facilitators
- Protecting God's Children for Parents

**Online**

- A Plan to Protect God's Children 4.0
- A Plan to Protect God's Children 4.0 (Español)
- Protecting God's Children® Online Awareness Session 4.0
- Protecting God's Children® Online Awareness Session 4.0 (Español)

A report can be run to screen, allowing the ability to drill into a user's account. Or, export the report to a CSV file with the ability to save to Excel.

- Show only users who are currently active
- Show only users who are currently active (including pending users)
- Show only users who are currently pending
- Show users who were active from:  to:  (e.g. audit period)
- Show facilitators only
- Show only users who are inactive
- Show all users (including inactive users)\*

Run Report to Screen
Export Report to CSV

3. The **C/D Report** assists diocesan coordinators with completing the Audit C/D report. It gathers and totals Role data for specific line items on the annual audit, such as training and background checks. It will report Role totals regarding the # of complete and # of not complete items for the audit period selected. To access this report, select the Administration tab, then the quick link for **Compliance Audit - Chart C/D Combo**. Choose your report year, your location, and training and background check renewal parameters from the drop-down menus. Select the Run button.

### Compliance Audit - Chart C/D

There two different methods for running this report:

- [Include users who were active at ANY TIME during the audit period](#)  
This is the traditional method and the method that has been the understanding from the earliest audit reports.
- [Include users who were active on June 30 of the current audit period](#)  
This is the method that is currently defined on the audit materials produced by the USCCB and is the method used by the current auditors audit period

### Compliance Audit - Chart C/D (Active on June 30, 2022)

Report Year: 2022 (7/1/2021 - 6/30/2022) Training is valid for: -- Select -- Background checks are valid for: -- Select -- Run [Filter by location](#)

4. To run a report of a list of emails or other related filters, please click on **User Reports** on the left hand side of the screen, and then **Customized Report** to build your report.

Reports

Compliance Reports

User Reports

Training Reports

Displays a user counts by category of user

- **Customized Report**  
Displays a list of users with the fields that you select

5. The **Background Check Report by Date, Location, Status** displays a list of users and a report of their background checks, filterable by background check date, user location, and background check status.

- **Background Check Report by Date, Location, Status**  
Displays a list of users and a report of their background checks,

You may filter the background check report by any of the criteria below, but none are required. If the date filters are used, the report will include all background check records created between the start date and end date.

All checked statuses will be reported. If no status is checked, all statuses will be included in the report; Incomplete, Initiated, Pending and/or Complete. Within the report, you can drill into the user's record to review.



**User Location:**  
-- Select a user location -- v

**Background Check Start Date:**

**Background Check End Date:**

**Background Check Status:**

Incomplete

Initiated

Pending

Complete

Get Report

6. When available, the **Renewal Report** provides an snapshot view of users that have received notification of a needed compliance item to complete. [The system is set to send out an automatic email providing notification when a user is due to complete online training. The renewal report identifies the users receiving notifications until the user completes the requirement.](#)



# How do I create a Compliance Report?

- Under "Quick Links" click on "Compliance Report."

**VIRTUS Online Administration**

**Quick Links**

- Approve users
- Schedule a session
- Live training report
- Calendar of Scheduled Training
- Rankings
- Training bulletin report
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Activity Report by Location
- Activity Report by User
- Master Report—Local level, Report to screen (previous version)
- Master Report—Downloadable Spreadsheet (previous version)
- Compliance Report
- **New Master Report (2022)**

- Select your location from the dropdown menu. You can either add additional filters, or just select "Run Report.":
  - You may export to Excel as a CSV file by selecting "Export."

**Compliance Report**

Use this page to see user compliance status

First Name:  Last Name:  Compliant:  Active:

Location:  Role:  Profile:

Items:  BGC  Bulletins  Documents  Training

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

- After running the report, those in compliance will have a green checkmark, and those not in compliance will have a red dash.

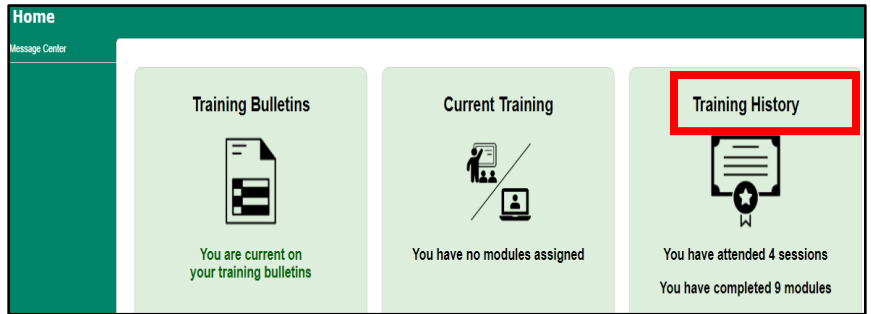
<input type="checkbox"/>	First Name	Last Name	Role(s)	Site(s)	Active	Compliance	Details
<input type="checkbox"/>	Roxana		Volunteer	Our Lady of Victories (Paterson)	Y	+	
<input type="checkbox"/>	Rosa		Volunteer	Our Lady of Victories (Paterson) St. John Cathedral (Paterson)	Y	+	

- For those not in compliance, the items they are missing will be indicated in the right-hand column and are labeled "Needs Attention."

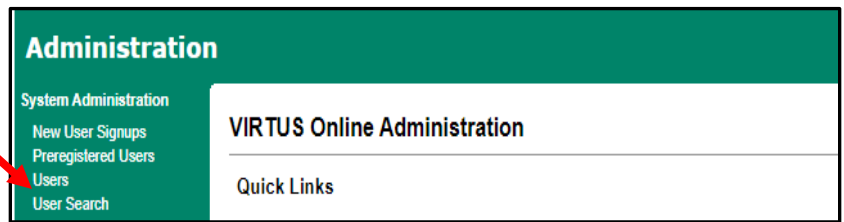
<input type="checkbox"/>	First Name	Last Name	Role(s)	Site(s)	Active	Compliance	Details
<input type="checkbox"/>	Nivene		Employee	Straight & Narrow (Paterson)	Y	-	Needs Attention • BGC • Code
<input type="checkbox"/>	Kelly		Educator	Villa Walsh Academy (Morristown)	Y	-	Needs Attention • BGC


# How do I view my own online personal training completion/ requirements and print my certificate?

1. There are multiple ways to view your completed training. One way is to go to your "Home" tab and click on "Training History." Another way is to use the "Administration" tab and look up your account using "User" or "User Search." Once in your account, select the "Training" Tab from the tabs at the top of the page.



2. As shown below, all completed training and training bulletins read will be listed. It is also possible to print a certificate by clicking on the certificate icon.



LIVE TRAINING			
Title	Date	Training Location	Status
Protecting God's Children for Adults	10/07/2006 1:30 PM	Center for Pastoral Leadership (Wickliffe)	Approved 

TRAINING BULLETINS			
Type	Featured	Read	Missed
Protecting God's Children for Adults ( <a href="#">click here for details</a> )	111	110	1

## ***If an individual took the VIRTUS training in another diocese, how do we ensure the training appears in the Database?***

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1. If an individual tells you that they have completed the training in another diocese, as long as they received credit for that training and have an online account, the VIRTUS Help Desk can transfer that user into the Diocese of Joliet so that the training they completed appears in the VIRTUS database. When transfers occur, the VIRTUS Help Desk will contact OCYP, and ask them to review the account to ensure that it is properly situated.

[Resources](#)   [Reporting Child Abuse](#)   [Contact Information](#)   [Help / FAQs](#)

**For help with registration, passwords, User IDs, background checks and website questions, please [click here to first review our Online Help / FAQs section](#) as your question may already be answered.**

After reviewing the [Online Help / FAQs section](#), for additional questions regarding online assistance, [message us using our Online Helpdesk Email Form](#).

**VIRTUS toll-free phone number for online assistance, questions and ordering:**  
[1-888-847-8870](tel:1-888-847-8870)