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

VIRTUS® Online

Local Administrator Website Guide

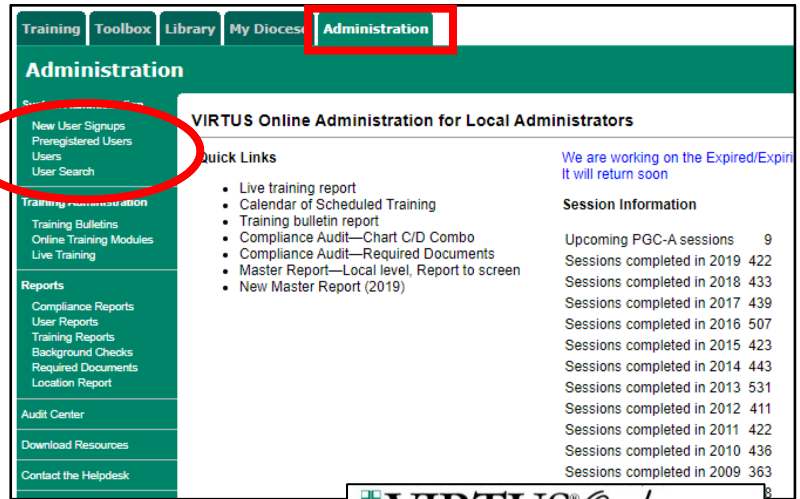
VIRTUS® Excellence Builds Trust

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 Coordinator.)

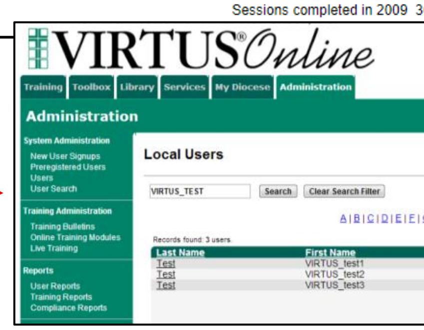
Frequently Asked Questions:

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

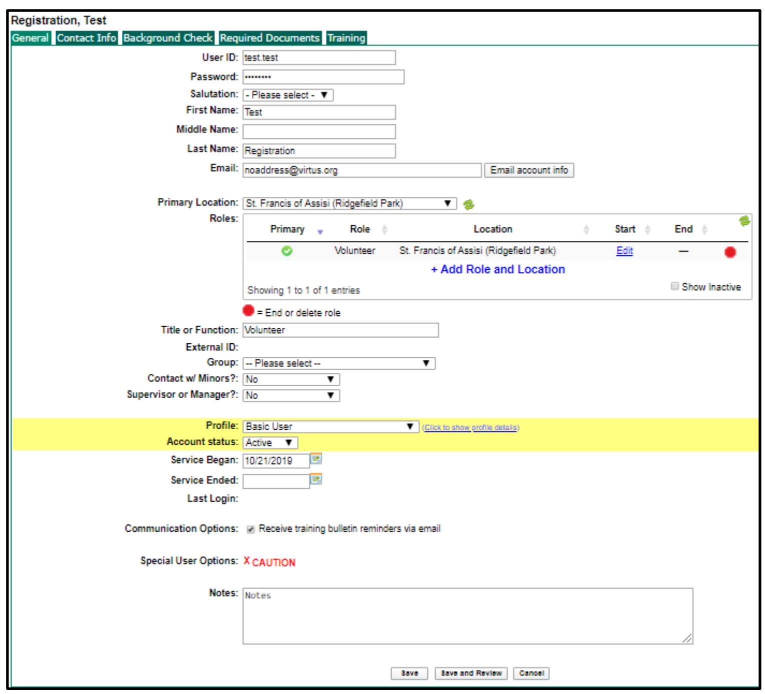


1. Select the "Administration" tab from the tabs at the top of the page:
   - **a.** New User Signups – indicates that the training session has past and the user is awaiting approval.
   - **b.** Preregistered Users – indicates that the user registered an upcoming session (the coordinators will be notified via email of the registration)
   - **c.** Users – indicates the list of users within the coordinators 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". If an individual is missing from your list:

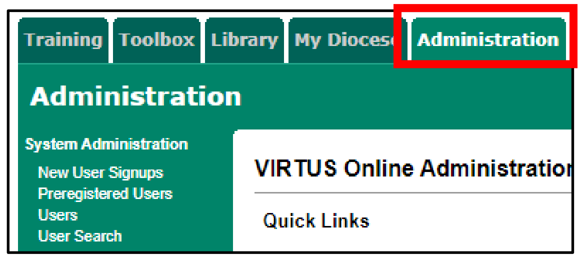


   - **a.** First, double check other possibilities of name spellings, including hyphenated last names and nicknames.
   - **b.** Additionally, the person may not have registered online, or they may have registered themselves with a different location within your organization.
   - **c.** If the user is 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 the Diocesan Safe Environment Office 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.



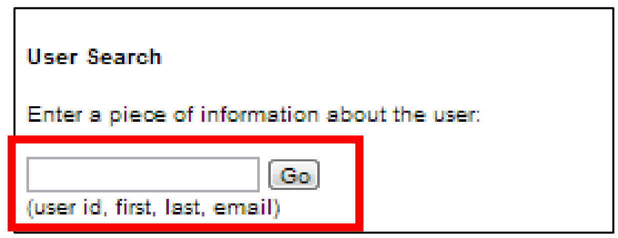
How do I search the entire organization to view if a particular person has an online registration, and make changes to their account and/or affiliate them with my location?

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



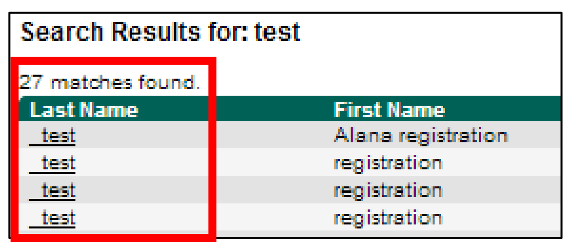
2. Search in the Search box for individual users, then select “Go”. For searching tips:

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”).



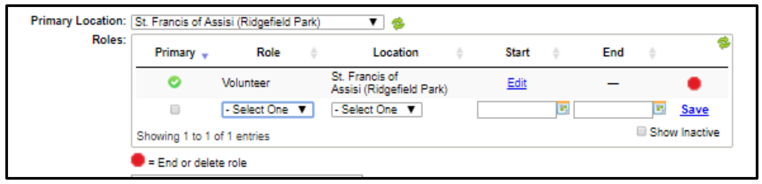
b. Searching with the first several letters of the last name usually yields the best and largest scope of results (i.e., search “Smi” rather than just “Smith”).

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.

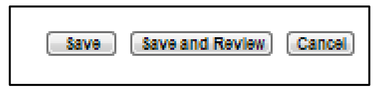


3. If a match is found, then click on the person's last name to view their account

   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 the Diocesan Coordinator 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.

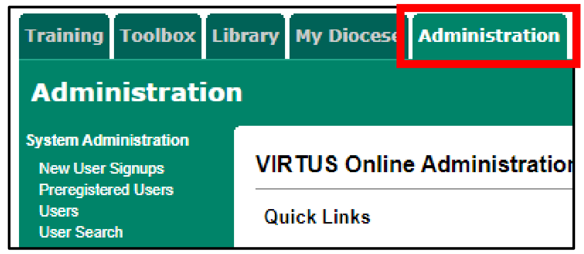


4. If a match is **not** found, it may be that the person did not create an online registration and still needs to create one.

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

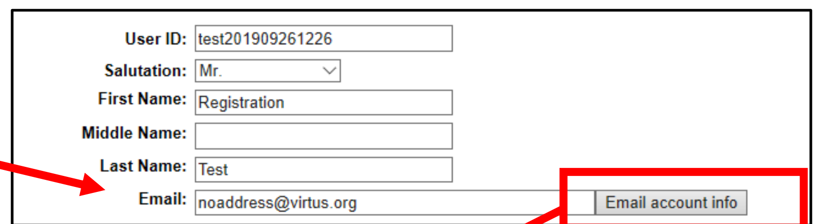
   First, search the database to find the online account by reviewing the instructions listed within this document under the section entitled, *"How do I search the entire organization to view if a particular individual has an online registration, make changes to their account and/or affiliate them with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



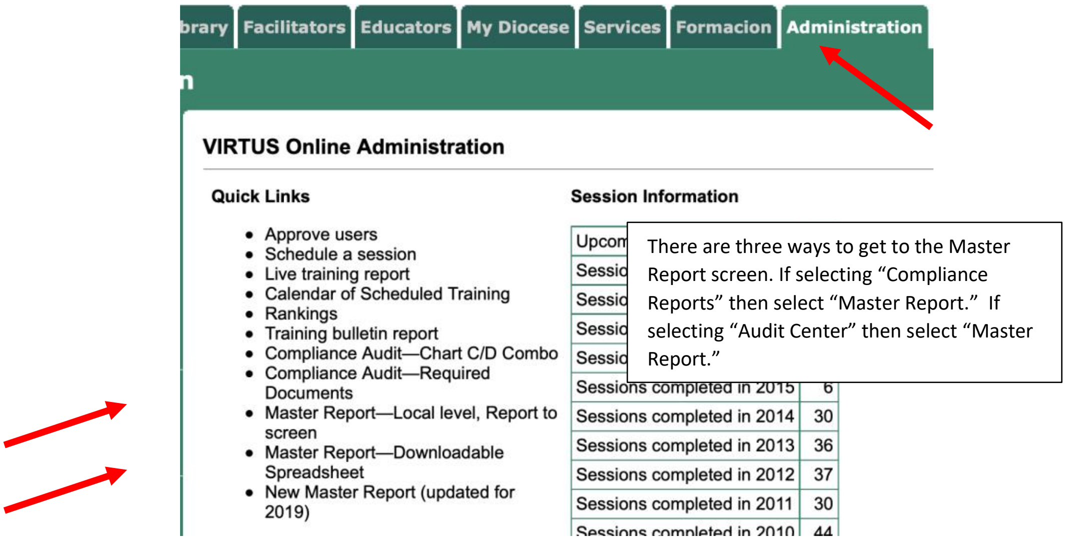
      ii. If the email is not accurate, then the administrator should update the email address and select "Save and Review" at the bottom of the page

      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

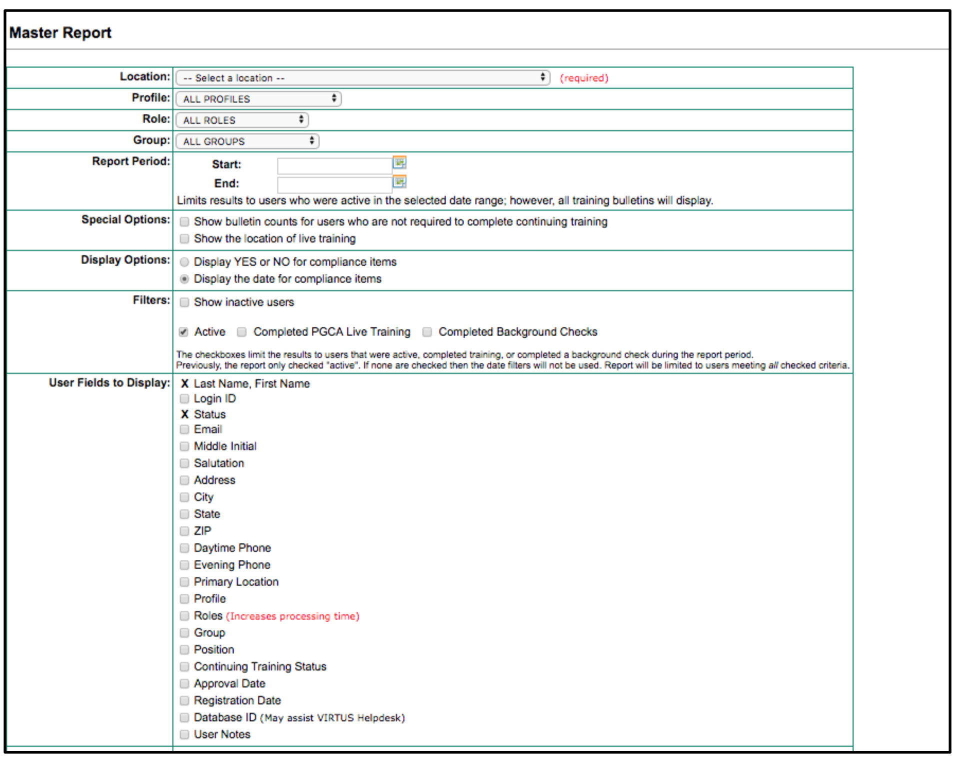
   b. If the Local Administrator does not share the same "Primary" or "Additional" location as the individual, the Local Administrator can only inform the individual of his/her User ID and request that the individual use the password recovery function on the homepage of www.virtus.org

How do I create a Master Report within VIRTUS Online?

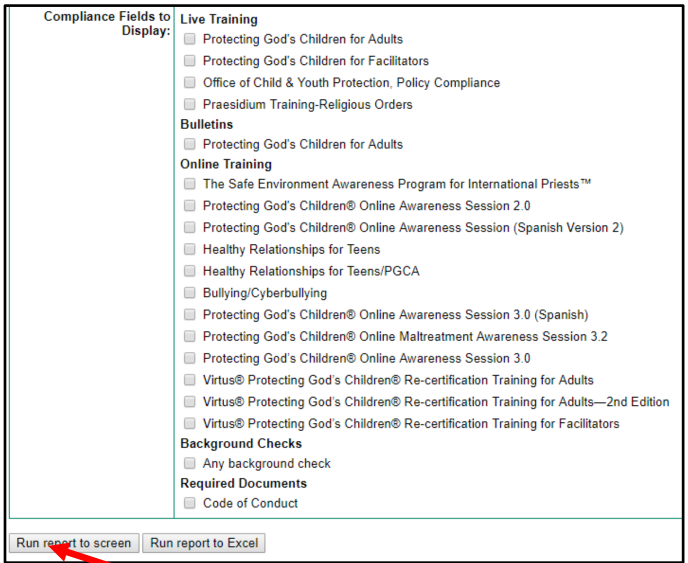
There are three ways to get to the Master Report screen after selecting the Administrative Tab.



The Master report allows for a variety of selections and combinations to filter your database information to customize a report. This is the top half of the screen. Make selections from this menu.



In order to generate the most effective report, make the desired selections to create the needed report.



It is advisable to "Run report to screen" first to make sure the report is what you expected. If not, you can go back to this screen and select other options.

Generate the <u>New Master Report</u>

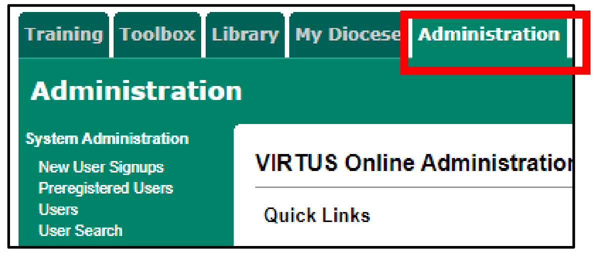
The report that is essential for auditing locations and combining all the most important details into one easy to read report is the New Master Report. The This report allows administrators to filter user requirements revealing only the most recent dates of completion.

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, or active during a specific period of time, or reveal all users active and inactive for a location. This is very helpful as an end of year report for locations.

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 select the "Training" Tab from the tabs at the top of the page; then, click on "Training Compliance" and then "Training Report"



Training Compliance

- Proof of Attendance
- Training Report
- Contact My Coordinator

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

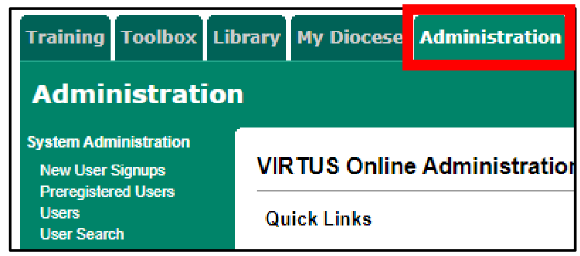
Title	Date	Training Location	Status
Protecting God's Children for Adults	10/07/2006 1:30 PM	Center for Pastoral Leadership (Wickliffe)	Approved

TRAINING BULLETINS

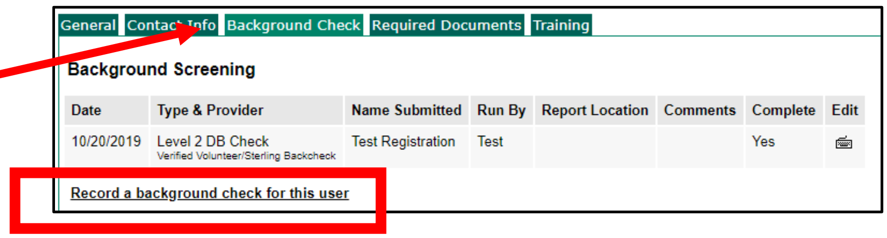
Type	Featured	Read	Missed
Protecting God's Children for Adults (click here for details)	111	110	1

How do I review an account to see if a background check, required document and/or training have been completed?

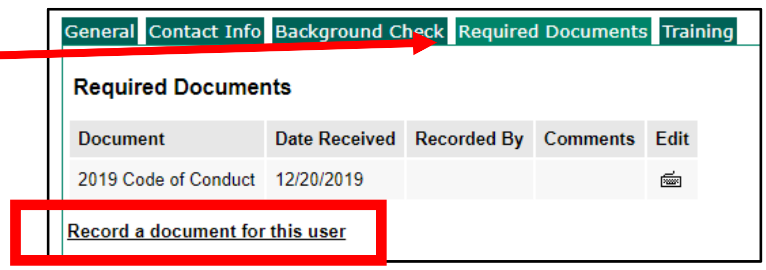
1. In order to review an account's main profile page, the Local Administrator must first search for the user and click on the person's name to open up the profile. If the Local Administrator is having difficulties locating an individual who has an account, please view the section in this document entitled,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



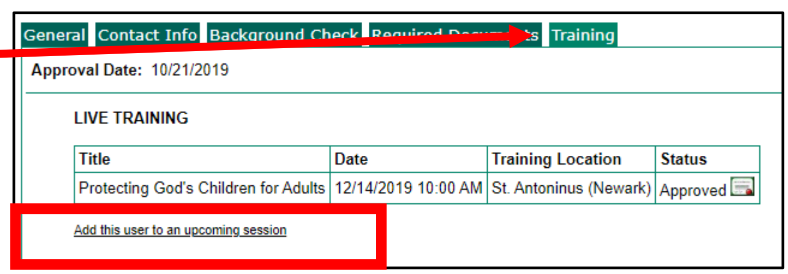
2. To view the Background Check, select the "Background Check" tab. To record a background check, please click on <u>Record a background check for this user</u>.



3. To view a Required Document acknowledgment, select the Required Documents Tab. To record a required document, please click on <u>Record a dcoument for this user</u>.

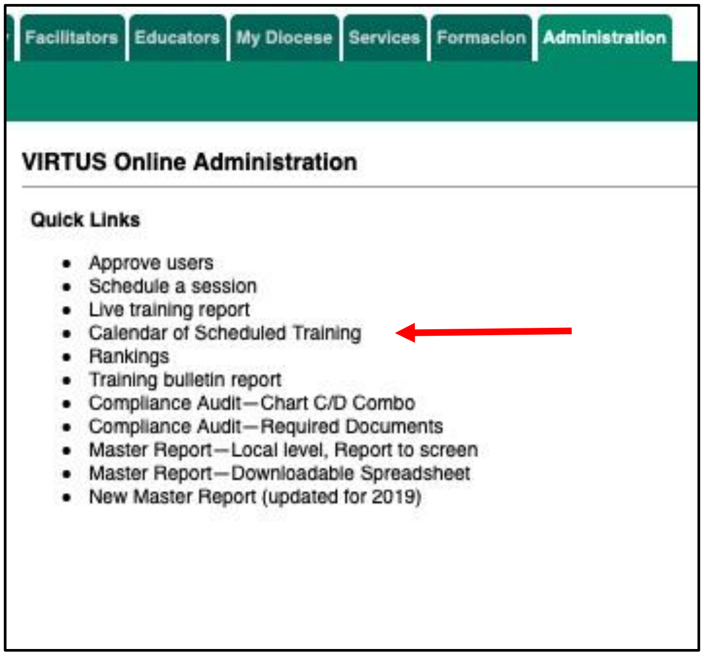


4. To view a training information, select the Training Tab. To add this user to an upcoming session, please click on <u>Add this user to an upcoming session</u>.

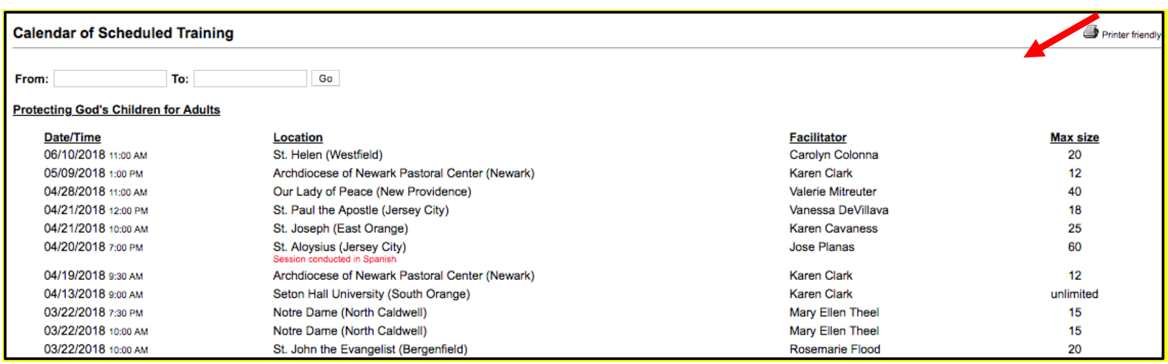


View a List of Upcoming Training Sessions

Select the “Administrator tab” and then select either “Calendar of Scheduled Training” in the middle of the screen or “Live Training” under “Training Administration” in the left-hand green margin.

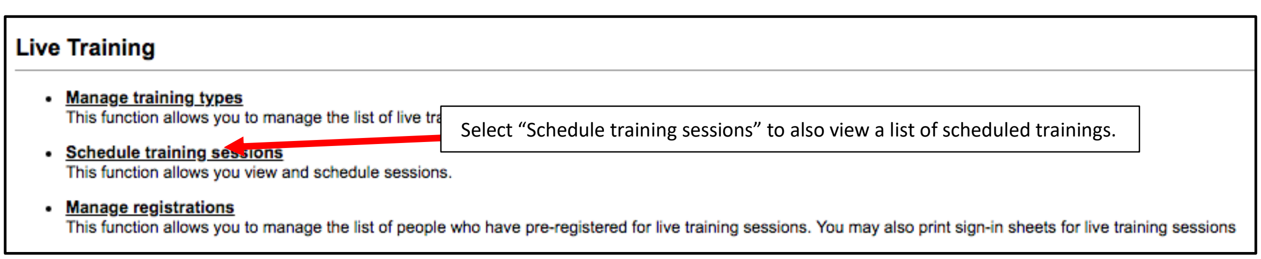


If “Calendar of Scheduled Training” is selected, this screen is displayed. Note the print icon.



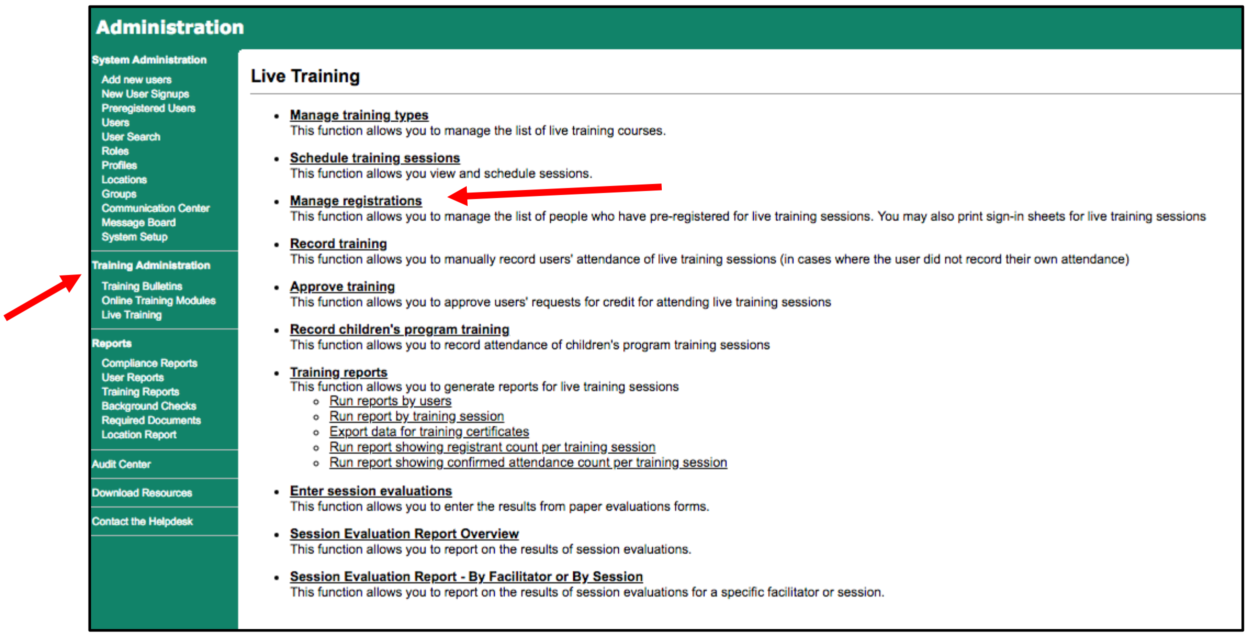
Date/Time	Location	Facilitator	Max size
06/10/2018 11:00 AM	St. Helen (Westfield)	Carolyn Colonna	20
05/09/2018 1:00 PM	Archdiocese of Newark Pastoral Center (Newark)	Karen Clark	12
04/28/2018 11:00 AM	Our Lady of Peace (New Providence)	Valerie Mitreuter	40
04/21/2018 12:00 PM	St. Paul the Apostle (Jersey City)	Vanessa DeVillava	18
04/21/2018 10:00 AM	St. Joseph (East Orange)	Karen Cavaness	25
04/20/2018 7:00 PM	St. Aloysius (Jersey City) Session conducted in Spanish	Jose Planas	60
04/19/2018 9:30 AM	Archdiocese of Newark Pastoral Center (Newark)	Karen Clark	12
04/13/2018 9:00 AM	Seton Hall University (South Orange)	Karen Clark	unlimited
03/22/2018 7:30 PM	Notre Dame (North Caldwell)	Mary Ellen Theel	15
03/22/2018 10:00 AM	Notre Dame (North Caldwell)	Mary Ellen Theel	15
03/22/2018 10:00 AM	St. John the Evangelist (Bergenfield)	Rosemarie Flood	20

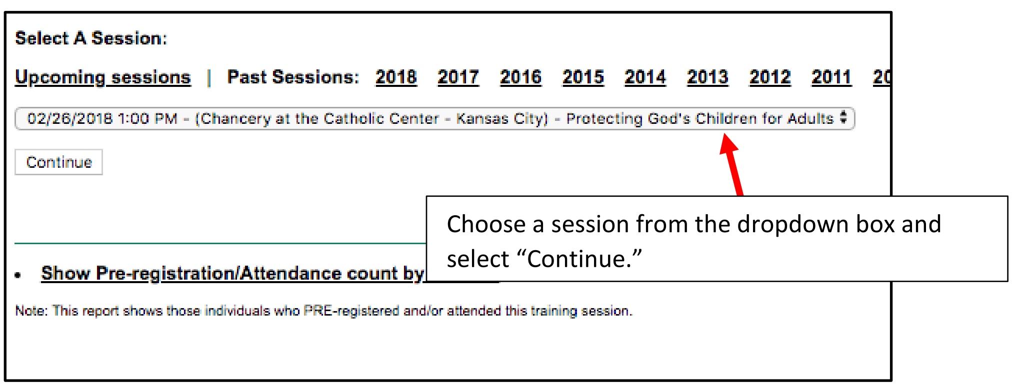
If “Live Training” is selected, this screen is displayed: (screen only partially displayed)



Print Attendance Sheets for Live Training Sessions

Select the “Administrator tab” and select “Live Training” under “Training Administration” on the left green bar. Then select “Manage Registrations.”





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

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 so that the training they completed appears in the VIRTUS database. When transfers occur, the VIRTUS Help Desk will contact the Diocesan Safe Environment Coordinator, and ask them to review the account to ensure that it is properly situated.