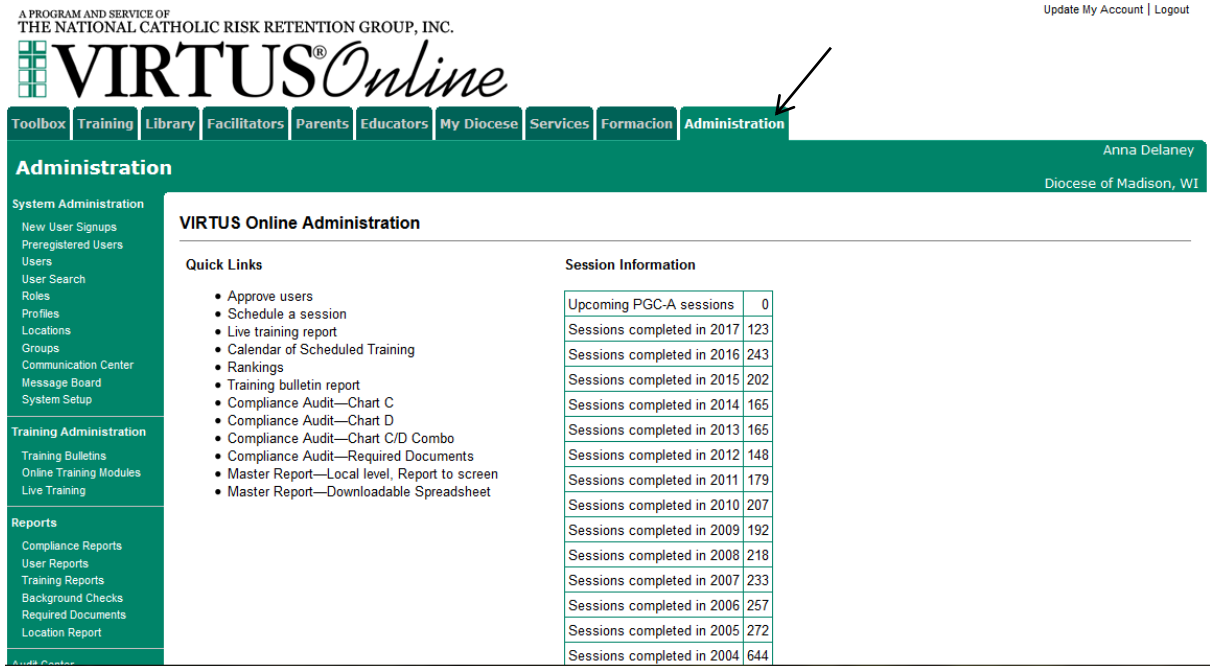


Changing a user's primary location and/or email in Virtus:

If you have a user contact where they moved to another location, you can change that in Virtus by following the steps below. **Please note: You can only “give away” a user, but cannot move a user into your organization.**

- 1) After logging into **Virtus**, click on the **Administration** tab, seen in the screen below.



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

VIRTUS[®]Online

Update My Account | Logout

Anna Delaney
Diocese of Madison, WI

Administration

System Administration

- New User Signups
- Preregistered Users
- Users
- User Search
- Roles
- Profiles
- Locations
- Groups
- Communication Center
- Message Board
- System Setup

Training Administration

- Training Bulletins
- Online Training Modules
- Live Training

Reports

- Compliance Reports
- User Reports
- Training Reports
- Background Checks
- Required Documents
- Location Report

VIRTUS Online Administration

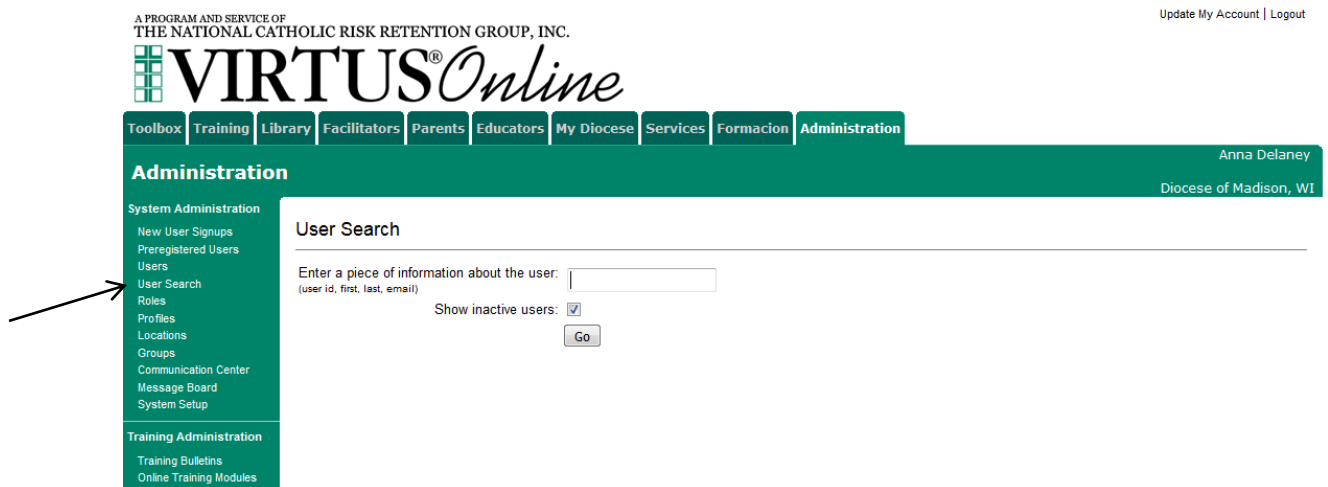
Quick Links

- Approve users
- Schedule a session
- Live training report
- Calendar of Scheduled Training
- Rankings
- Training bulletin report
- Compliance Audit—Chart C
- Compliance Audit—Chart D
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Master Report—Local level, Report to screen
- Master Report—Downloadable Spreadsheet

Session Information

Session Information	
Upcoming PGC-A sessions	0
Sessions completed in 2017	123
Sessions completed in 2016	243
Sessions completed in 2015	202
Sessions completed in 2014	165
Sessions completed in 2013	165
Sessions completed in 2012	148
Sessions completed in 2011	179
Sessions completed in 2010	207
Sessions completed in 2009	192
Sessions completed in 2008	218
Sessions completed in 2007	233
Sessions completed in 2006	257
Sessions completed in 2005	272
Sessions completed in 2004	644

- 2) Next, on the left navigation bar, click on the User Search area. Your screen should refresh similar to below:



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User Search

Enter a piece of information about the user:
(user id, first, last, email)

Show inactive users: ☒

Go

- 3) Make sure the checkmark to “Show Inactive Users” is checked, then enter in the last name of the individual and click **Go**. You will see your results, similar to below (the image below has greyed out the sensitive information about these members, as this is a “live data” view)



[Toolbox](#) [Training](#) [Library](#) [Facilitators](#) [Parents](#) [Educators](#) [My Diocese](#) [Services](#) [Formacion](#) [Administration](#)

Administration

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System Administration

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Training Administration

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Reports

User Search

Enter a piece of information about the user:
(user id, first, last, email)

smith

Show inactive users: ☒

[Go](#)

Search Results for: smith

132 matches found.

Last Name	First Name	Middle Name	User ID	User Email	Status	Trained
cantwell-smith	kathy	a	annawestover	annawestover@madisondiocese.org	Active User	08/24/2005 6:00 PM
Kopplin Smith	Holly	Susan	hollyk	hollyk@madisondiocese.org	Active User	08/25/2004 6:30 PM
mccann-smith	wanda		wanda@madisondiocese.org	wanda@madisondiocese.org	Active User	09/30/2015 6:00 PM
Smith	Aaron	Gene	asmith	asmith@madisondiocese.org	Active User	08/13/2013 6:00 PM
Smith	Alana		alana@madisondiocese.org	alana@madisondiocese.org	Active User	08/22/2016 3:00 PM
smith	amy	I	aldabee	aldabee@madisondiocese.org	Active User	01/14/2006 9:00 AM

- 4) Click on the person's last name (as seen in the example below) and you will see more information about that person. Please, **DOUBLE CHECK** that the email listed to the left of the **Email account info** button, is correct. If it is not, please correct it, by entering in the userID in the email and then clicking **Save** at the bottom of the screen.



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Administration

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System Administration

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Delaney, Anna

[General](#) [Contact Info](#) [Private](#) [Background Check](#) [Required Documents](#) [Training](#)

User ID: annawestover

Password: ••••••••

Salutation: - Please select -

First Name: Anna

Middle Name:

Last Name: Delaney

Email: Anna.Delaney@madisondiocese.org

[Email account info](#)

[Save](#)

[Save and Review](#)

[Cancel](#)

- 5) Next, directly below the Email area, verify that the user's Primary location is correct. If it should not be your location, you can click the arrow and "give them" to the correct parish. If you wish to add a user to your location, contact the Office of Safe Environment.

Delaney, Anna

General | Contact Info | Private | Background Check | Required Documents | Training

User ID:

Password:

Salutation:

First Name:

Middle Name:

Last Name:

Email: [Email account info](#)

Primary Location:

Additional Locations:

Roles:

Title or Function:

External (diocese) ID:

Group:

Contact w/ Minors?:

Supervisor or Manager?:

Profile:

Continuing Training:

Account status:

6) After selecting the new **Primary Location** click the **Save** icon at the bottom of the screen.