

## Running Compliance Reports from Virtus

If you are the local administrator for your organization, from time to time you will wish to verify that all your users: employees and volunteers, are listed correctly for their status in Virtus. There are two ways to run the Compliance reports, a basic report and more indepth.

Running the basic compliance report below, will only show the overall name and status of the member, and their notes. In reviewing this report please keep in mind that all members marked Inactive should not be volunteers, educators or employees at your organization.

**Inactive:** A user that is missing, incomplete, or incriminating information and should not be volunteering or employed at the organization. If they have missing information, they may be able to complete that information and return to an Active status. If a member has incriminating information, the information returned to us through the normal course of the Safe Environment checks indicate that they are too high of a risk to be involved within our organization.

**Active:** A person that has completed the Safe Environment requirements and can volunteer or be employed at the organization in any capacity. Please note: a member may be temporarily marked as Active to allow for an Inactive user to complete some of their requirements within a specific time period. If that is the case, please refer to the user's notes which usually documents what is needed.

### Basic Compliance Report:

- 1) Please log into the Virtus website, which is located at this link: [www.virtusonline.org](http://www.virtusonline.org)
- 2) Click on the **Administration** tab at the top and your screen will be listed similar to the screen shot below:

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

# VIRTUS<sup>®</sup>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**

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

- 3) On the left side, under the **Reports** area, click on **Compliance reports** as seen in the image above. Your screen will refresh and appear similar to the screen shot below. Click on the area that says **Master Report** as indicated below:

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**VIRTUS<sup>®</sup>Online**

Update My Account | Logout

Toolbox Training Library Facilitators Parents Educators My Diocese Services Formacion Administration

Administration Anna Delaney  
Diocese of Madison, WI

System Administration  
New User Signups  
Preregistered Users  
Users  
User Search  
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Training Administration  
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Online Training Modules  
Live Training

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

Audit Center  
Download Resources

### Compliance Reports

- Master Report ←
- Compliance Audit Chart C
- Compliance Audit Chart D
- Compliance Audit Chart C/D Combo
- Compliance Audit  
Required Documents
- Calendar of Scheduled Training
- Children's Program Training Reports
- Condensed Training and Background Check Report
- Rankings

- 4) Within the Master Reports, first click on the drop down arrow and select the location you wish to view the report (unless your location is already showing)

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Toolbox Training Library Facilitators Parents Educators My Diocese Services Formacion Administration

Administration Anna Delaney  
Diocese of Madison, WI

System Administration  
New User Signups  
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Audit Center  
Download Resources  
Contact the Helpdesk

### Master Report

Location: -- Select a location -- (required)

Profile: ALL PROFILES

Role: ALL ROLES

Group: ALL GROUPS

Report Period:  
Start:    
End:    
Limits results to users who were active in the selected date range; however, all training bulletins will display.

Special Options:  
☐ Show bulletin counts for users who are not required to complete continuing training  
☐ Show the location of live training  
☐ Show the totals row at bottom of the Excel version (May interfere with sorting)

Display Options:  
☐ Display YES or NO for compliance items  
☒ Display the date for compliance items

Filters:  
☐ Show inactive users  
☒ Active ☐ Completed PGCA Live Training ☐ Completed Background Checks  
 The checkboxes limit the results to users that were active, completed training, or completed a background check during the report period. Previously, the report only checked "active". If none are checked then the date filters will not be used. Report will be limited to users meeting all checked criteria.

User Fields to Display:  
☒ Last Name, First Name  
☐ Login ID  
☒ Status  
☒ Caution  
☐ Email  
☐ Middle Initial  
☐ Salutation  
☐ Suffix

- 5) Next, look under the **Filters** area, seen below, and check mark the box to **Show inactive Users**.

## Master Report

Location:	All Saints Catholic School (Berlin) <span>(required)</span>
Profile:	ALL PROFILES
Role:	ALL ROLES
Group:	ALL GROUPS
Report Period:	Start: <input type="text"/> End: <input type="text"/> Limits results to users who were active in the selected date range; however, all training bulletins will display.
Special Options:	<input type="checkbox"/> Show bulletin counts for users who are not required to complete continuing training <input type="checkbox"/> Show the location of live training <input type="checkbox"/> Show the totals row at bottom of the Excel version (May interfere with sorting)
Display Options:	<input type="radio"/> Display YES or NO for compliance items <input checked="" type="radio"/> Display the date for compliance items
Filters:	<input checked="" type="checkbox"/> Show inactive users <input checked="" type="checkbox"/> Active <input type="checkbox"/> Completed PGCA Live Training <input type="checkbox"/> Completed Background Checks <small>The checkboxes limit the results to users that were active, completed training, or completed a background check during the report period. Previously, the report only checked "active". If none are checked then the date filters will not be used. Report will be limited to users meeting all checked criteria.</small>

- 6) Scroll further down till you see the **User Fields to Display** at the bottom of the list, click the box in front of the **User Notes** so you can see any last notes on the user:

The screenshot shows the VIRTUS Online web application interface. On the left is a green sidebar with navigation links: 'Audit Center', 'Download Resources', and 'Contact the Helpdesk'. The main content area is titled 'User Fields to Display' and contains a list of checkboxes for various user attributes. The 'User Notes' checkbox is checked, and an arrow points to it. Below this section is the 'Compliance Fields to Display' section, which includes checkboxes for 'Live Training' (with sub-options 'Protecting God's Children for Adults' and 'Protecting God's Children for Facilitators') and 'Bulletins'. The browser's address bar shows the URL 'https://www.virtusonline.org/csa/ComboReport.cfm'.

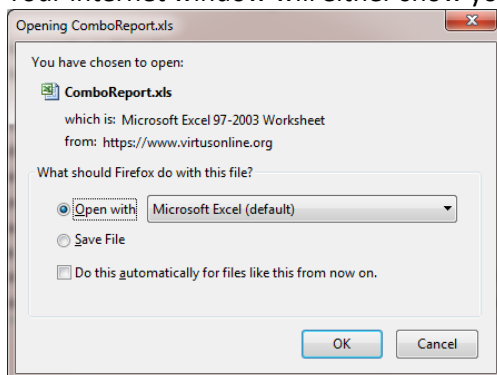
- 7) Continue scrolling to the bottom of the screen, there will be two options, either to view the report within your internet window (Run Report to Screen) or to view the information in Microsoft Excel. (Run Report to Excel)

<input type="checkbox"/>	Protecting God's Children® Online Maltreatment Awareness Session 3.2
<input type="checkbox"/>	Protecting God's Children® Online Awareness Session 3.0
<input type="checkbox"/>	Virtus® Protecting God's Children® Re-certification Training for Facilitators
<b>Background Checks</b>	
<input type="checkbox"/>	Legacy Data: Background Check Cleared
<input type="checkbox"/>	Legacy Data: Background Check Processed - Not Cleared
<input type="checkbox"/>	Selection: Clergy
<input type="checkbox"/>	Selection: Combined
<input type="checkbox"/>	Legacy Data: Credit Background Check Cleared
<input type="checkbox"/>	Legacy Data: Driver's Background Check Cleared
<input type="checkbox"/>	Selection: Employee
<input type="checkbox"/>	Selection: Volunteer
<b>Required Documents</b>	
<input type="checkbox"/>	Diocese of Madison, Policy Regarding Sexual Abuse of Minors and Vulnerable Adults, Sexual Misconduct, and Sexual Harassment
<input type="checkbox"/>	Diocesis de Madison, Política con Respecto al Abuso Sexual de Menores, Mala Conducta Sexual y Acoso Sexual

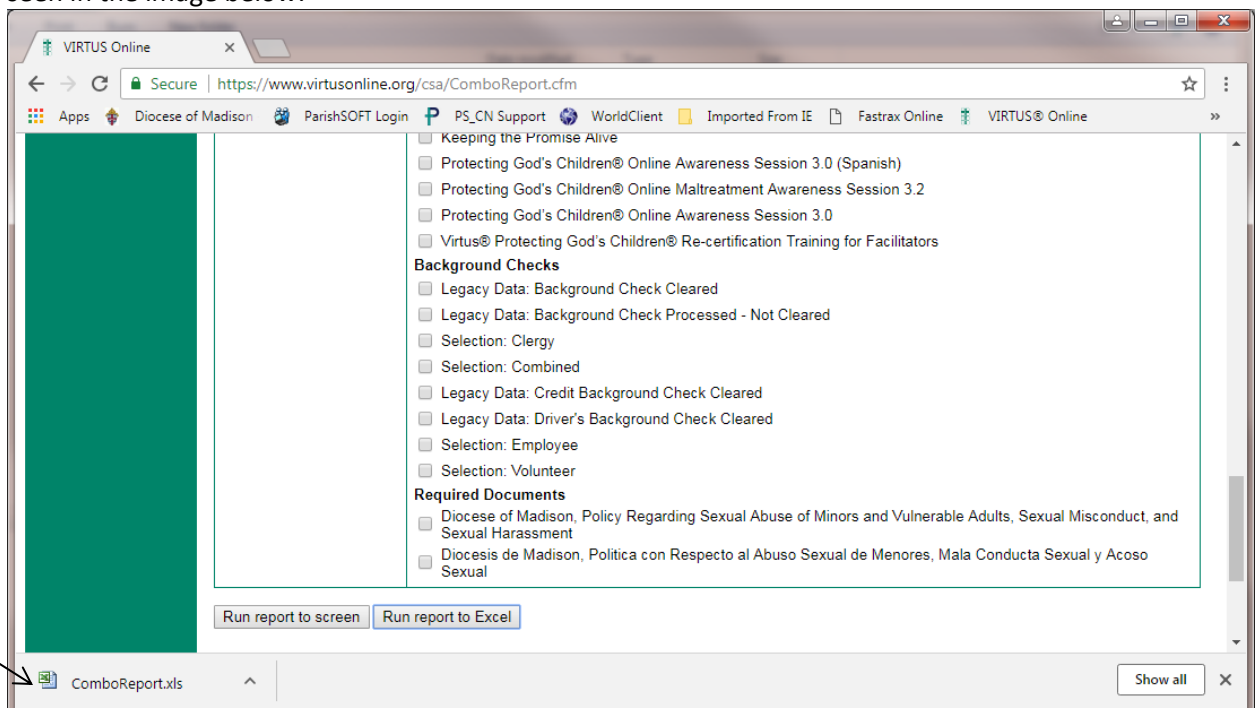
Run report to screen   Run report to Excel

Most will want to click **Run Report to Excel**.

Your internet window will either show you the document to open, as seen in the image below:

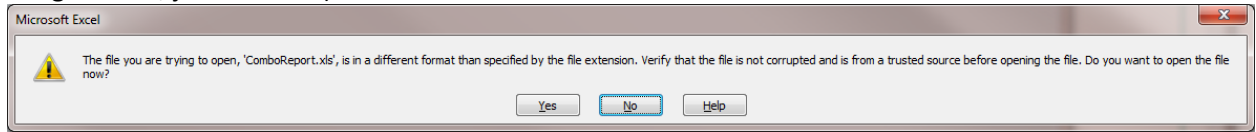


OR you may see your internet browser show you the document at the bottom of the screen, as seen in the image below:



- 8) In either circumstance, click to open the document and you will see a document similar to the one seen below:

(you may get a warning that you are opening a file different from the extension, as seen in the image below, just click **Yes**)

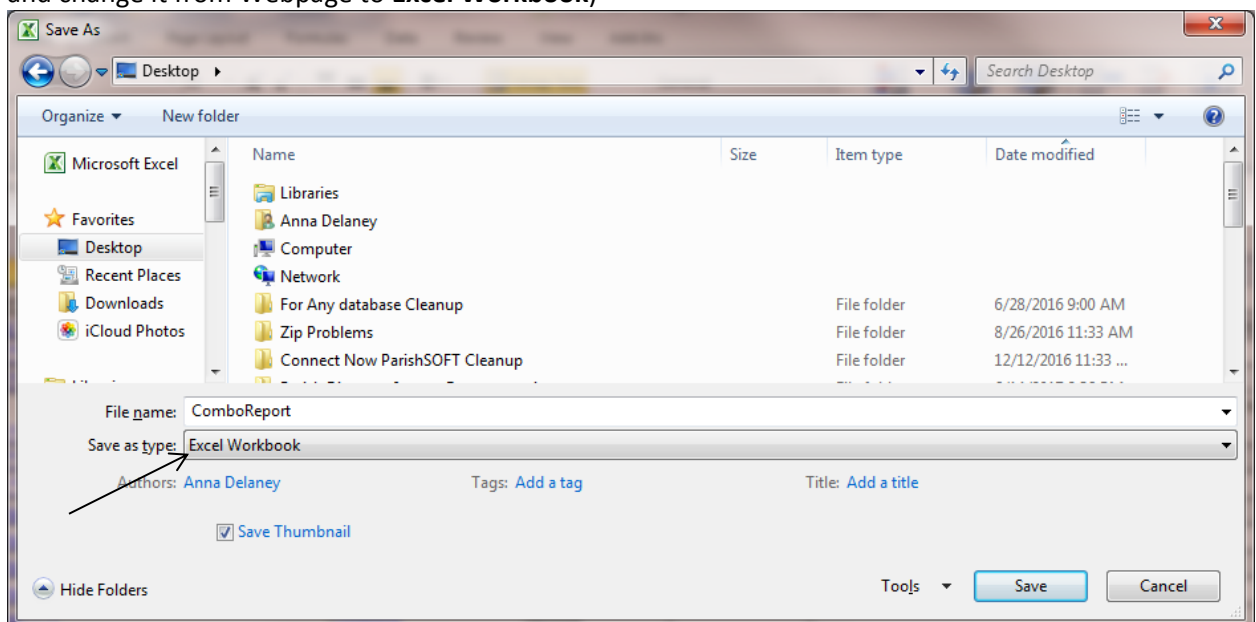


The Microsoft Excel file will appear similar to the one below:

The screenshot shows a Microsoft Excel window titled "ComboReport [Protected View] - Microsoft Excel". A yellow banner at the top says "Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing". The table below has the following data:

	A	B	C	D	E	F	G
	Last Name	First Name	Status	Caution	Notes		
1	Last Name	First Name	Status	Caution	Notes		
2	Ahasay †	Melinda	Active		- Suspended by: Cheryl Neddersen on 04/27/2011 at 8:37 AM (central)		
3	Awad ** †	Ihab	Active				
4	Bartol †	Amy	Active				
5	Bartol †	Gerene	Inactive		Inactive according to database Inactivated by: Cheryl Neddersen on 12/15/2008 at 2:14 PM (Central)		
6	Bella ** †	Sandy	Active				
7	Belter ** †	Amy	Active				
8	Bending ** †	Andrew	Active				
9	Bending ** †	Brian	Active				
10	Bending ** †	Melissa	Active				
11	Bending ** †	Rachel	Active				
12	Bending ** †	Timothy	Active				
13	Bending ** †	Tracy	Active				
14	Besore ** †	Charles	Active				

- 9) Click the **Enable Editing** button to make any of the changes you want to this document.
- 10) When you go to save the document, make sure you change the "type" of the document to be a Excel workbook (see **Save as Type** area marked below, click the drop down arrow on the right and change it from Webpage to **Excel Workbook**)



**Advanced Compliance Report:**

1. Please log into the Virtus online site, at the website listed here: [www.virtusonline.org](http://www.virtusonline.org)
2. Click on the **Administration** tab, then on the left side, under the **Reports** area, click on the **Compliance Reports**

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**VIRTUS<sup>®</sup>Online**

Update My Account | Logout

Toolbox Training Library Facilitators Parents Educators My Diocese Services Formacion **Administration**

**Administration**

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**Reports**

Compliance Reports  
User Reports  
Training Reports  
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Required Documents  
Location Report

**VIRTUS Online Administration**

Quick Links

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- 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

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	244

3. Click on the area that says **Master Report** as indicated below:

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**VIRTUS<sup>®</sup>Online**

Update My Account | Logout

Toolbox Training Library Facilitators Parents Educators My Diocese Services Formacion **Administration**

**Administration**

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**Reports**

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Location Report

**Compliance Reports**

- Master Report
- Compliance Audit Chart C
- Compliance Audit Chart D
- Compliance Audit Chart C/D Combo
- Compliance Audit Required Documents
- Calendar of Scheduled Training
- Children's Program Training Reports
- Condensed Training and Background Check Report
- Rankings

4. Within the **Master Report** again, click on the **Location** dropdown and select the location for your report.

**Administration**

Anna Delaney

Diocese of Madison, WI

**System Administration**

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[Preregistered Users](#)  
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**Training Administration**

[Training Bulletins](#)  
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[Live Training](#)

**Reports**

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[Background Checks](#)  
[Required Documents](#)  
[Location Report](#)

**Master Report**

Location:	All Saints Catholic School (Berlin) <span style="color: red;">(required)</span>	
Profile:	ALL PROFILES ▼	
Role:	ALL ROLES ▼	
Group:	ALL GROUPS ▼	
Report Period:	Start: <input type="text"/> <input type="button" value="Go"/> End: <input type="text"/> <input type="button" value="Go"/> <small>Limits results to users who were active in the selected date range; however, all training bulletins will display.</small>	
Special Options:	<input type="checkbox"/> Show bulletin counts for users who are not required to complete continuing training <input type="checkbox"/> Show the location of live training <input type="checkbox"/> Show the totals row at bottom of the Excel version (May interfere with sorting)	
Display Options:	<input type="radio"/> Display YES or NO for compliance items <input checked="" type="radio"/> Display the date for compliance items	
Filters:	<input type="checkbox"/> Show inactive users	

5. If you wish to verify all your users that are assigned to your location, under the **Filters**, again select the checkbox to **Show Inactive users**.

**Administration**

Anna Delaney

Diocese of Madison, WI

**System Administration**

[New User Signups](#)  
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**Training Administration**

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**Reports**

[Compliance Reports](#)  
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**Audit Center**

[Download Resources](#)

[Contact the Helpdesk](#)

**Master Report**

Location:	All Saints Catholic School (Berlin) <span style="color: red;">(required)</span>	
Profile:	ALL PROFILES ▼	
Role:	ALL ROLES ▼	
Group:	ALL GROUPS ▼	
Report Period:	Start: <input type="text"/> <input type="button" value="Go"/> End: <input type="text"/> <input type="button" value="Go"/> <small>Limits results to users who were active in the selected date range; however, all training bulletins will display.</small>	
Special Options:	<input type="checkbox"/> Show bulletin counts for users who are not required to complete continuing training <input type="checkbox"/> Show the location of live training <input type="checkbox"/> Show the totals row at bottom of the Excel version (May interfere with sorting)	
Display Options:	<input type="radio"/> Display YES or NO for compliance items <input checked="" type="radio"/> Display the date for compliance items	
Filters:	<input checked="" type="checkbox"/> Show inactive users <input checked="" type="checkbox"/> Active <input type="checkbox"/> Completed PGCA Live Training <input type="checkbox"/> Completed Background Checks <small>The checkboxes limit the results to users that were active, completed training, or completed a background check during the report period. Previously the report only checked "active". If none are checked then the date filters will not be used. Report will be limited to users meeting all checked criteria.</small>	

6. In the **User Fields to Display**, if you wish to see any additional information on the report, click any of the additional fields. At a minimum, click the **User Notes** field.

Download Resources

Contact the Helpdesk

Filter: All Users | Completed / Ongoing Training | Completed Background Checks

The checkboxes limit the results to users that were active, completed training, or completed a background check during the report period. Previously, the report only checked "active". If none are checked then the date filters will not be used. Report will be limited to users meeting all checked criteria.

**User Fields to Display:**

- ☒ Last Name, First Name
- ☐ Login ID
- ☒ Status
- ☒ Caution
- ☐ Email
- ☐ Middle Initial
- ☐ Salutation
- ☐ Suffix
- ☐ Address
- ☐ City
- ☐ State
- ☐ ZIP
- ☐ Daytime Phone
- ☐ Evening Phone
- ☐ Primary Location
- ☐ Profile
- ☐ Roles (Increases processing time)
- ☐ Group
- ☐ Position
- ☐ Continuing Training Status
- ☐ Approval Date
- ☐ Registration Date
- ☐ Database ID (May assist VIRTUS Helpdesk)
- ☒ User Notes

Compliance Fields to Display:

7. In order to look for all the different requirements your users have fulfilled, under the **Compliance Fields to Display:** please click the following fields shown below:

☐ Database ID (May assist VIRTUS Helpdesk)

☒ User Notes

**Compliance Fields to Display:**

**Live Training**

- ☒ Protecting God's Children for Adults
- ☐ Protecting God's Children for Facilitators

**Bulletins**

- ☐ Protecting God's Children for Adults

**Online Training**

- ☐ Protecting God's Children® Online Awareness Session 2.0
- ☐ Protecting God's Children® Online Awareness Session (Spanish Version 2)
- ☐ Keeping the Promise Alive
- ☐ Protecting God's Children® Online Awareness Session 3.0 (Spanish)
- ☐ Protecting God's Children® Online Maltreatment Awareness Session 3.2
- ☒ Protecting God's Children® Online Awareness Session 3.0
- ☐ Virtus® Protecting God's Children® Re-certification Training for Facilitators

**Background Checks**

- ☒ Legacy Data: Background Check Cleared
- ☒ Legacy Data: Background Check Processed - Not Cleared
- ☐ Selection: Clergy
- ☐ Selection: Combined
- ☒ Legacy Data: Credit Background Check Cleared
- ☒ Legacy Data: Driver's Background Check Cleared
- ☒ Selection: Employee
- ☒ Selection: Volunteer

**Required Documents**

- ☒ Diocese of Madison, Policy Regarding Sexual Abuse of Minors and Vulnerable Adults, Sexual Misconduct, and Sexual Harassment
- ☐ Diocesis de Madison, Política con Respecto al Abuso Sexual de Menores, Mala Conducta Sexual y Acoso Sexual

Run report to screen Run report to Excel

8. Click the button at the bottom to **Run Report to Excel**
9. Open the document from your internet browser to view it in Excel, as seen below:



Protected View: This file originated from an Internet location and might be unsafe. Click for more details. [Enable Editing](#)

	A	B	C	D	E	F	G	H	I	J
	Last Name	First Name	Status	Caution	Notes	Diocese of Madison, Policy Regarding Sexual Abuse of Minors and Vulnerable Adults, Sexual Misconduct, and Sexual Harassment	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver Cleared
1	Ahasay **	Melinda	Active			NO	9/17/2008	NO	NO	NO
2	Award **	Ihab	Active			NO	NO	NO	NO	NO
3	Bartol **	Amy	Active			NO	NO	NO	NO	NO
4	Bartol **	Gerene	Inactive		Inactivated according to database on 12/15/2008 at 2:14 PM (Central)	NO	8/16/2004	NO	NO	NO
5	Bella **	Sandy	Active			NO	5/1/2017	NO	NO	NO
6	Belter **	Amy	Active			NO	NO	NO	NO	NO
7	Bending **	Andrew	Active			NO	10/11/2012	NO	NO	NO
8	Bending **	Brian	Active			NO	9/19/2014	NO	NO	NO
9	Bending **	Melissa	Active			NO	9/8/2016	NO	NO	NO
10	Bending **	Rachel	Active			NO	10/4/2012	NO	NO	NO
11	Bending **	Timothy	Active			NO	9/8/2016	NO	NO	NO
12	Bending **	Tracy	Active			NO	NO	NO	NO	NO
13	Becore **	Charles	Active			NO	10/12/2011	NO	NO	NO
14	Beulen **	Chris	Active		- Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	NO	NO
15	Beulen **	Melissa	Active			NO	3/3/2015	NO	NO	NO
16	Beuthin **	Patricia	Active			NO	9/19/2014	NO	NO	NO
17	Beuthin **	Mike	Active			NO	NO	NO	NO	NO
18	Beuthin **	Jaime	Active			NO	9/15/2004	NO	NO	NO

10. At the top, click the area in yellow to “Enable Editing” of the document, as indicated above.

ComboReport (3) - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J
	Last Name	First Name	Status	Caution	Notes	Diocese of Madison, Policy Regarding Sexual Abuse of Minors and Vulnerable Adults, Sexual Misconduct, and Sexual Harassment	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver Cleared
1	Ahasay **	Melinda	Active			NO	9/17/2008	NO	NO	NO
2	Award **	Ihab	Active			NO	NO	NO	NO	NO
3	Bartol **	Amy	Active			NO	NO	NO	NO	NO
4	Bartol **	Gerene	Inactive		Inactivated according to database on 12/15/2008 at 2:14 PM (Central)	NO	8/16/2004	NO	NO	NO
5	Bella **	Sandy	Active			NO	5/1/2017	NO	NO	NO
6	Belter **	Amy	Active			NO	NO	NO	NO	NO
7	Bending **	Andrew	Active			NO	10/11/2012	NO	NO	NO
8	Bending **	Brian	Active			NO	9/19/2014	NO	NO	NO
9	Bending **	Melissa	Active			NO	9/8/2016	NO	NO	NO
10	Bending **	Rachel	Active			NO	10/4/2012	NO	NO	NO
11	Bending **	Timothy	Active			NO	9/8/2016	NO	NO	NO
12	Bending **	Tracy	Active			NO	NO	NO	NO	NO
13	Becore **	Charles	Active			NO	10/12/2011	NO	NO	NO
14	Beulen **	Chris	Active		- Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	NO	NO
15	Beulen **	Melissa	Active			NO	3/3/2015	NO	NO	NO
16	Beuthin **	Patricia	Active			NO	9/19/2014	NO	NO	NO
17	Beuthin **	Mike	Active			NO	NO	NO	NO	NO
18	Beuthin **	Jaime	Active			NO	9/15/2004	NO	NO	NO

11. Next, we will re-name the columns to make sense for analysis of your users. In column F, click where it says “Diocese of Madison, Policy regarding Sexual Abuse of Minors and Vulnerable Adults, Sexual Misconduct and Sexual Harassment” and having highlighted that cell type in **Diocesan Policies**

ComboReport (3) - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J
	Last Name	First Name	Status	Caution	Notes	Diocesan Policies	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver Cleared
1	Ahasay **	Melinda	Active			NO	9/17/2008	NO	NO	NO
2	Award **	Ihab	Active			NO	NO	NO	NO	NO
3	Bartol **	Amy	Active			NO	NO	NO	NO	NO
4	Bartol **	Gerene	Inactive		Inactivated according to database on 12/15/2008 at 2:14 PM (Central)	NO	8/16/2004	NO	NO	NO
5	Bella **	Sandy	Active			NO	5/1/2017	NO	NO	NO
6	Belter **	Amy	Active			NO	NO	NO	NO	NO
7	Bending **	Andrew	Active			NO	10/11/2012	NO	NO	NO
8	Bending **	Brian	Active			NO	9/19/2014	NO	NO	NO
9	Bending **	Melissa	Active			NO	9/8/2016	NO	NO	NO
10	Bending **	Rachel	Active			NO	10/4/2012	NO	NO	NO
11	Bending **	Timothy	Active			NO	9/8/2016	NO	NO	NO
12	Bending **	Tracy	Active			NO	NO	NO	NO	NO
13	Becore **	Charles	Active			NO	10/12/2011	NO	NO	NO
14	Beulen **	Chris	Active		- Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	NO	NO
15	Beulen **	Melissa	Active			NO	3/3/2015	NO	NO	NO
16	Beuthin **	Patricia	Active			NO	9/19/2014	NO	NO	NO
17	Beuthin **	Mike	Active			NO	NO	NO	NO	NO
18	Beuthin **	Jaime	Active			NO	9/15/2004	NO	NO	NO

12. Scroll over till you see the columns K and L. These are titled: Selection –Employee and Selection –Volunteer. Please replace those titles with the words Background check Employee and Background check Volunteer

	G	H	I	J	K	L	M	N	O
1	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver's Background Check Cleared	Background check Employee	Background check Volunteer	Virtus Trained	Protecting God's Children® Online Awareness Session 3.0	
2	9/17/2008	NO	NO	NO	NO	NO	8/20/2001	Not Assigned	
3	NO	NO	NO	NO	NO	NO	6/13/2012	Not Assigned	
4	NO	NO	NO	NO	NO	NO	1/22/2006	Not Assigned	
5	8/16/2004	NO	NO	NO	NO	NO	4/21/2004	Not Assigned	
6	5/1/2017	NO	NO	NO	NO	NO	4/24/2017	Not Assigned	
7	NO	NO	NO	NO	NO	NO	5/1/2015	Not Assigned	
8	10/11/2012	NO	NO	NO	NO	NO	9/25/2012	Not Assigned	
9	9/19/2014	NO	NO	NO	NO	NO	9/8/2014	Not Assigned	
10	9/8/2016	NO	NO	NO	NO	NO	9/7/2016	Not Assigned	
11	10/4/2012	NO	NO	NO	NO	NO	9/25/2012	Not Assigned	
12	9/8/2016	NO	NO	NO	NO	NO	9/7/2016	Not Assigned	
13	NO	NO	NO	NO	NO	NO	9/8/2014	Not Assigned	
14	10/12/2011	NO	NO	NO	NO	NO	10/3/2011	Not Assigned	
15	NO	NO	NO	NO	NO	NO	4/23/2004	Not Assigned	
16	3/3/2015	NO	NO	NO	NO	NO	2/18/2015	Not Assigned	
17	9/19/2014	NO	NO	NO	NO	NO	9/8/2014	Not Assigned	
18	NO	NO	NO	NO	NO	NO	8/8/2004	Not Assigned	

13. Finally we will “move” the columns from one part of the document to another to easily view who has completed what information. Highlight Column K by clicking where the column has the letter K. It will highlight the whole column, next, with your mouse still over column K, right click and select **Cut**. Scroll over and click on the column G header, to highlight that column, right click and select **Insert Cut Cells**. That will have inserted the cells right after the Diocesan Policies column. (as seen below)

	B	C	D	E	F	G	H	I	J	K
1	First Name	Status	Caution	Notes	Diocesan Policies	Background check Employee	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver's Background Check Cleared
2	Melinda	Active			NO	NO	9/17/2008	NO	NO	NO
3	Shab	Active			NO	NO	NO	NO	NO	NO
4	Amy	Active			NO	NO	NO	NO	NO	NO
5	Gerene	Inactive		Inactive according to database Inactivated by Cheryl Neddersen on 12/15/2008 at 2:14 PM (Central)	NO	NO	8/16/2004	NO	NO	NO
6	Sandy	Active			NO	NO	5/1/2017	NO	NO	NO
7	Amy	Active			NO	NO	NO	NO	NO	NO
8	Andrew	Active			NO	NO	10/11/2012	NO	NO	NO
9	Brian	Active			NO	NO	9/19/2014	NO	NO	NO
10	Melissa	Active			NO	NO	9/8/2016	NO	NO	NO
11	Rachel	Active			NO	NO	10/4/2012	NO	NO	NO
12	Timothy	Active			NO	NO	9/8/2016	NO	NO	NO
13	Tracy	Active			NO	NO	NO	NO	NO	NO
14	Charles	Active		Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	10/12/2011	NO	NO	NO
15	Chris	Active			NO	NO	NO	NO	NO	NO
16	Melissa	Active			NO	NO	3/3/2015	NO	NO	NO
17	Patricia	Active			NO	NO	9/19/2014	NO	NO	NO
18	Mike	Active			NO	NO	NO	NO	NO	NO
19	James	Active			NO	NO	9/15/2004	NO	NO	9/15/2004
20	Lisa	Active			NO	NO	NO	NO	NO	NO
21	Lawrence	Active			NO	NO	10/12/2011	NO	NO	10/12/2011
22	Ronan	Active			NO	NO	9/14/2004	NO	NO	NO
23	Renae	Active			NO	NO	8/27/2004	NO	8/27/2004	8/27/2004
24	ronald	Active			NO	NO	NO	NO	NO	NO
25	Joseph	Active			1/15/2018	NO	10/2/2015	NO	NO	NO
26	Christina	Active			NO	NO	10/4/2012	NO	NO	NO
27	Erin	Active			NO	NO	6/7/2004	NO	NO	NO
28	James	Active			NO	NO	9/8/2016	NO	NO	NO
29	Susan	Active			NO	NO	11/16/2004	NO	NO	NO
30	Carol	Active			NO	NO	NO	NO	NO	NO
31	Louise	Active			NO	NO	5/20/2015	NO	NO	NO
32	Matthew	Active			NO	NO	NO	NO	NO	NO
33	Carol	Active			NO	NO	9/8/2016	NO	NO	NO
34	Patti	Active			NO	NO	10/4/2012	NO	NO	NO
35	Jane	Active			NO	NO	9/13/2004	NO	NO	NO

14. Next, we will “move” the column L also by scrolling over, highlighting column L by clicking where the column has the letter L. It will highlight the whole column, next, with your mouse still over column L, right click and select **Cut**. Scroll over and click on the column H header, to highlight that column, right click and select **Insert Cut Cells**.

	D	E	F	G	H	I	J	K	L
1	Caution	Notes	Diocesan Policies	Background check Employee	Background check Volunteer	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver's Background Check Cleared
2		NO	NO	NO	NO	9/17/2008	NO	NO	NO
3		NO	NO	NO	NO	NO	NO	NO	NO
4		NO	NO	NO	NO	NO	NO	NO	NO
5		Inactive according to database Inactivated by: Cheryl Neddersen on 12/15/2008 at 2:14 PM (Central)	NO	NO	NO	8/16/2004	NO	NO	NO
6		NO	NO	NO	NO	5/1/2017	NO	NO	NO
7		NO	NO	NO	NO	NO	NO	NO	NO
8		NO	NO	NO	NO	10/11/2012	NO	NO	NO
9		NO	NO	NO	NO	9/19/2014	NO	NO	NO
10		NO	NO	NO	NO	9/8/2016	NO	NO	NO
11		NO	NO	NO	NO	10/4/2012	NO	NO	NO
12		NO	NO	NO	NO	9/8/2016	NO	NO	NO
13		NO	NO	NO	NO	NO	NO	NO	NO
14		NO	NO	NO	NO	10/12/2011	NO	NO	NO
15		Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	NO	NO	NO	NO
16		NO	NO	NO	NO	3/3/2015	NO	NO	NO
17		NO	NO	NO	NO	9/19/2014	NO	NO	NO
18		NO	NO	NO	NO	NO	NO	NO	NO
19		NO	NO	NO	NO	9/15/2004	NO	NO	9/15/2004
20		NO	NO	NO	NO	NO	NO	NO	NO
21		NO	NO	NO	NO	10/12/2011	NO	NO	10/12/2011
22		NO	NO	NO	NO	9/14/2004	NO	NO	NO
23		NO	NO	NO	NO	8/27/2004	NO	8/27/2004	8/27/2004
24		1/15/2018	NO	NO	1/24/2018	NO	NO	NO	NO
25		NO	NO	NO	NO	10/2/2015	NO	NO	NO
26		NO	NO	NO	NO	10/4/2012	NO	NO	NO
27		NO	NO	NO	NO	6/7/2004	NO	NO	NO
28		NO	NO	NO	NO	9/8/2016	NO	NO	NO
29		NO	NO	NO	NO	11/16/2004	NO	NO	NO
30		NO	NO	NO	NO	NO	NO	NO	NO
31		NO	NO	NO	NO	5/26/2015	NO	NO	NO
32		NO	NO	NO	NO	NO	NO	NO	NO
33		NO	NO	NO	NO	9/8/2016	NO	NO	NO
34		NO	NO	NO	NO	10/4/2012	NO	NO	NO
35		NO	NO	NO	NO	9/13/2004	NO	NO	NO

15. Finally, we will move the last column, Column N, so that it is also next to the columns we just moved. Click where is lists column N to highlight it, right click and select **Cut**. Scroll over to column I, click where it indicates I and to highlight it, right click and select **Insert Cut Cells**.

	E	F	G	H	I	J	K
1	Notes	Diocesan Policies	Background check Employee	Background check Volunteer	Protecting God's Children* Online Awareness Session 3.0	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared
2	NO	NO	NO	NO	Not Assigned	9/17/2008	NO
3	NO	NO	NO	NO	Not Assigned	NO	NO
4	NO	NO	NO	NO	Not Assigned	NO	NO
5	Inactive according to database Inactivated by: Cheryl Neddersen on 12/15/2008 at 2:14 PM (Central)	NO	NO	NO	Not Assigned	8/16/2004	NO
6	NO	NO	NO	NO	Not Assigned	5/1/2017	NO
7	NO	NO	NO	NO	Not Assigned	NO	NO
8	NO	NO	NO	NO	Not Assigned	10/11/2012	NO
9	NO	NO	NO	NO	Not Assigned	9/19/2014	NO
10	NO	NO	NO	NO	Not Assigned	9/8/2016	NO
11	NO	NO	NO	NO	Not Assigned	10/4/2012	NO
12	NO	NO	NO	NO	Not Assigned	9/8/2016	NO
13	NO	NO	NO	NO	Not Assigned	NO	NO
14	NO	NO	NO	NO	Not Assigned	10/12/2011	NO
15	Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	Not Assigned	NO	NO
16	NO	NO	NO	NO	Not Assigned	3/3/2015	NO
17	NO	NO	NO	NO	Not Assigned	9/19/2014	NO

16. Finally, we will be highlighting different columns, to create ease in reading your report. Click and drag your mouse to highlight Column F, G, H and I. Then click the highlight icon and select the yellow color those columns yellow, as seen below:

	E	F	G	H	I	J	K	L
1	Notes	Diocesan Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online Awareness Session 3.0	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Background Check Processed - Not Cleared
2		NO	NO	NO	Not Assigned	9/17/2008	NO	NO
3		NO	NO	NO	Not Assigned	NO	NO	NO
4		NO	NO	NO	Not Assigned	NO	NO	NO
5	Inactive according to database Inactivated by: Cheryl Neddersen on 12/15/2008 at 2:14 PM (Central)	NO	NO	NO	Not Assigned	8/16/2004	NO	NO
6		NO	NO	NO	Not Assigned	5/1/2017	NO	NO
7		NO	NO	NO	Not Assigned	NO	NO	NO
8		NO	NO	NO	Not Assigned	10/11/2012	NO	NO
9		NO	NO	NO	Not Assigned	9/19/2014	NO	NO
10		NO	NO	NO	Not Assigned	9/8/2016	NO	NO
11		NO	NO	NO	Not Assigned	10/4/2012	NO	NO
12		NO	NO	NO	Not Assigned	9/8/2016	NO	NO
13		NO	NO	NO	Not Assigned	NO	NO	NO
14		NO	NO	NO	Not Assigned	10/12/2011	NO	NO
15	- Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	Not Assigned	NO	NO	NO
16		NO	NO	NO	Not Assigned	3/3/2015	NO	NO
17		NO	NO	NO	Not Assigned	9/19/2014	NO	NO
18		NO	NO	NO	Not Assigned	NO	NO	NO
19		NO	NO	NO	Not Assigned	9/15/2004	NO	NO
20		NO	NO	NO	Not Assigned	NO	NO	NO
21		NO	NO	NO	Not Assigned	10/12/2011	NO	NO
22		NO	NO	NO	Not Assigned	9/14/2004	NO	NO
23		NO	NO	NO	Not Assigned	8/27/2004	NO	NO
24		1/15/2018	NO	1/24/2018	1/15/2018	NO	NO	NO

17. Next in order to better review the users at your organization, click on the **View** tab, seen indicated below, select **Freeze Panes**, and then select **Freeze Top Row**, which will allow the headers to remain in the document as you review the users.

	A	B	C	D	E	F	G	H	I	J	K
1	Last Name	First Name	Status	Caution	Notes	Diocesan Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared
2	Ahasay ** t	Melinda	Active			NO	NO	NO	Not Assigned	9/17/2008	NO
3	Awad ** t	Ihab	Active			NO	NO	NO	Not Assigned	NO	NO
4	Bartol t	Amy	Active			NO	NO	NO	Not Assigned	NO	NO
5	Bartol t	Gerene	Inactive		Inactive according to database Inactivated by: Cheryl Neddersen on 12/15/2008 at 2:14 PM (Central)	NO	NO	NO	Not Assigned	8/16/2004	NO
6	Bella ** t	Sandy	Active			NO	NO	NO	Not Assigned	5/1/2017	NO
7	Belter ** t	Amy	Active			NO	NO	NO	Not Assigned	NO	NO
8	Bending ** t	Andrew	Active			NO	NO	NO	Not Assigned	10/11/2012	NO
9	Bending ** t	Brian	Active			NO	NO	NO	Not Assigned	9/19/2014	NO
10	Bending ** t	Melissa	Active			NO	NO	NO	Not Assigned	9/8/2016	NO
11	Bending ** t	Rachel	Active			NO	NO	NO	Not Assigned	10/4/2012	NO
12	Bending ** t	Timothy	Active			NO	NO	NO	Not Assigned	9/8/2016	NO
13	Bending ** t	Tracy	Active			NO	NO	NO	Not Assigned	NO	NO
14	Besore ** t	Charles	Active			NO	NO	NO	Not Assigned	10/12/2011	NO

18. Finally, as you start to review each member, please be aware that anyone that signed up through Virtus more current than June 2017, will have their compliance sections shown in the yellow highlighted area. As seen in the record on the very bottom of the screen below:

