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.

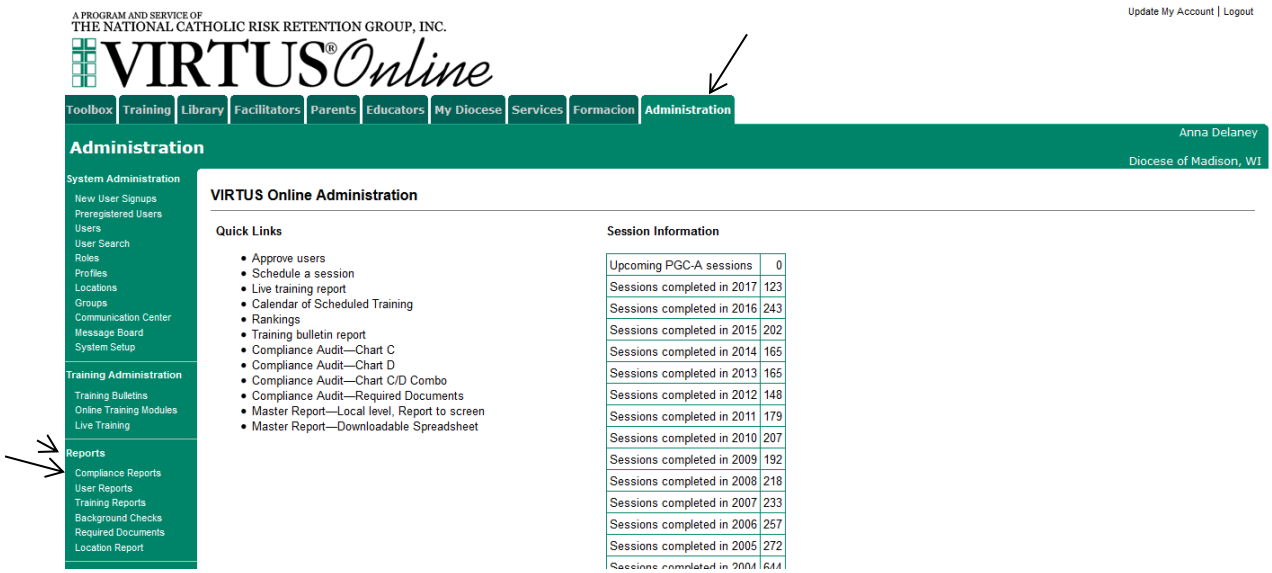
Running the basic compliance report below, will only show the overall name and status of the member, and their notes. In reviewing this report please keep in mind that all members marked Inactive should note be volunteers, educators or employees at your organization.

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.

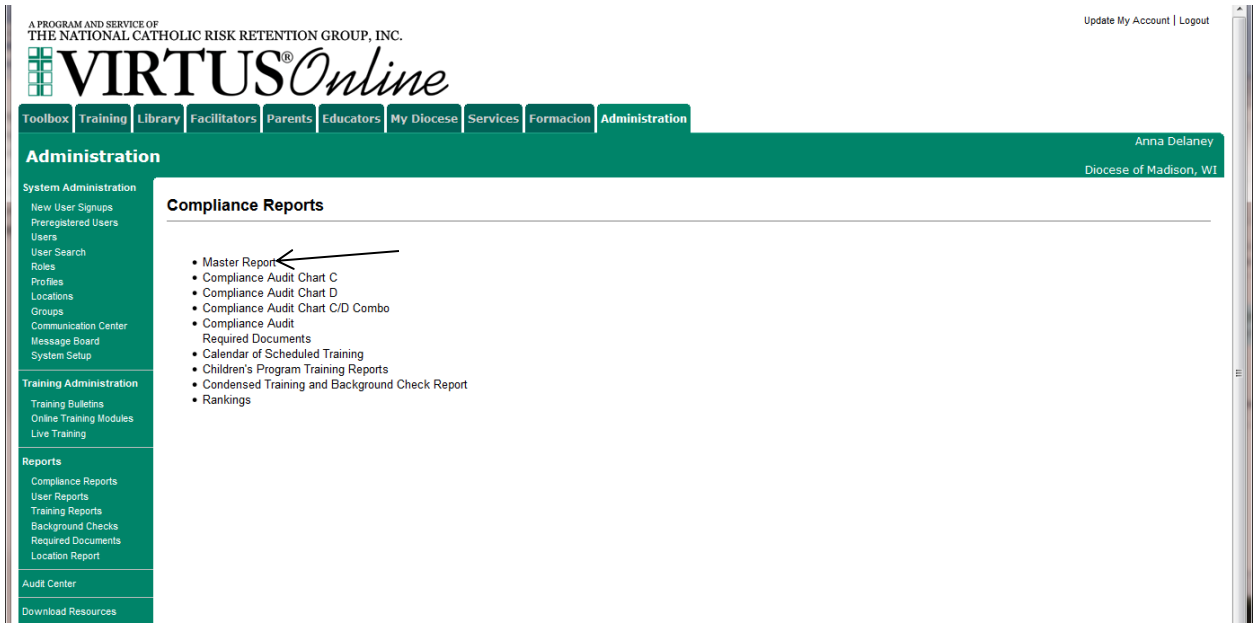
Active: A person that has completed the Safe Environment requirements and can volunteer or be employed at the organization in any capacity. Please note: a member may be temporarily marked as Active to allow for an Inactive user to complete some of their requirements within a specific time period. If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

Basic Compliance Report:

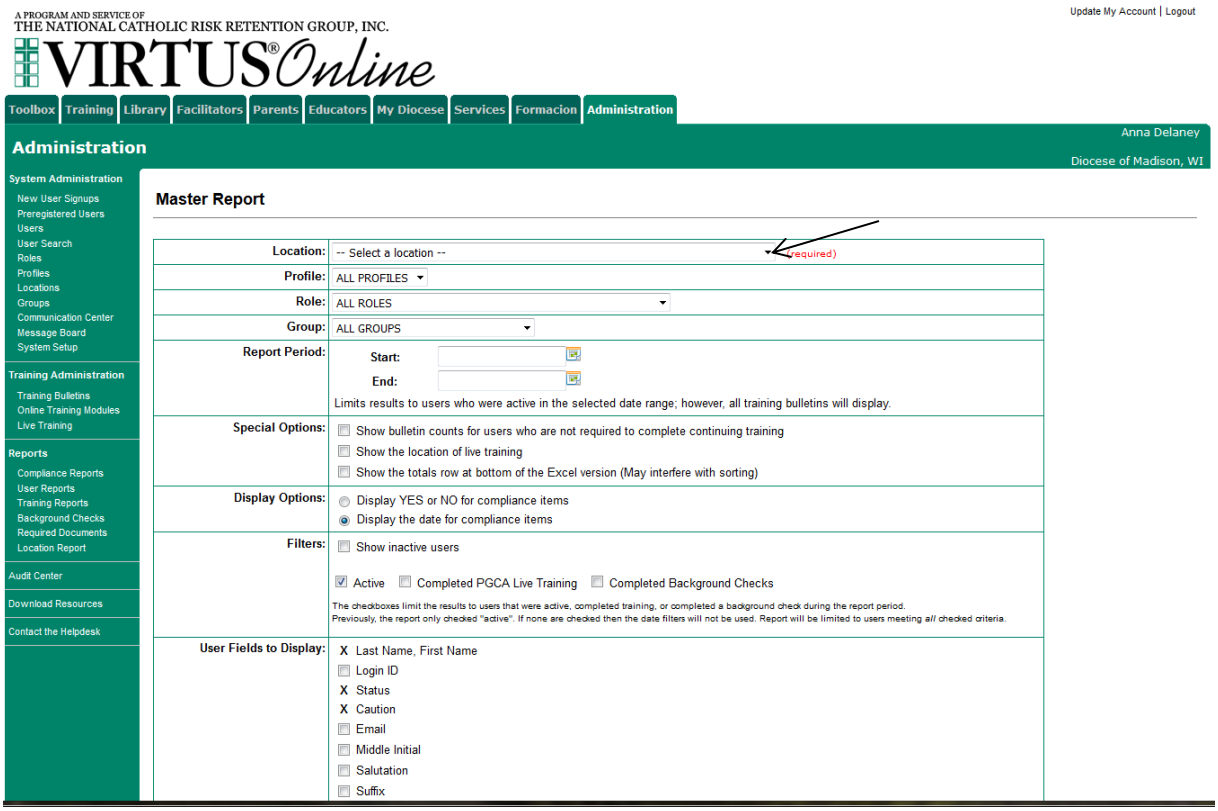
1) Please log into the Virtus website, which is located at this link: www.virtusonline.org
2) Click on the **Administration** tab at the top and your screen will be listed similar to the screen shot below:



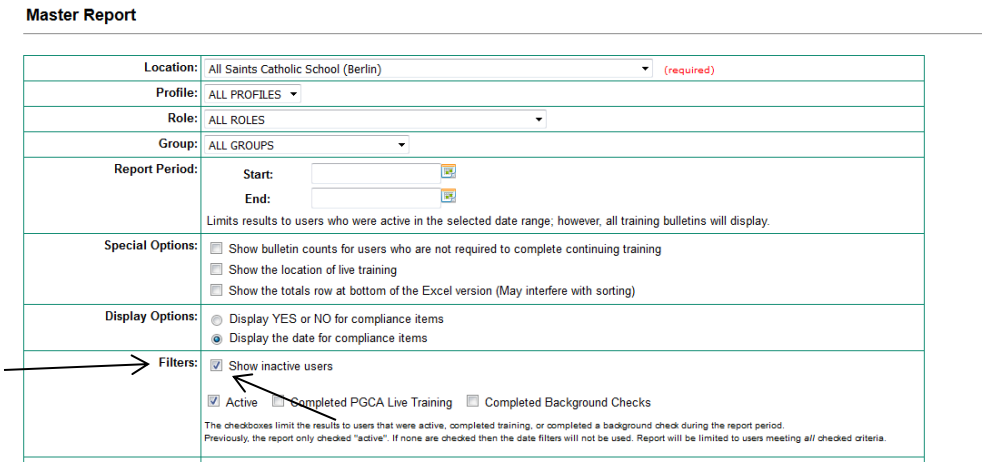
3) On the left side, under the **Reports** area, click on **Compliance reports** as seen in the image above. Your screen will refresh and appear similar to the screen shot below. Click on the area that says **Master Report** as indicated below:



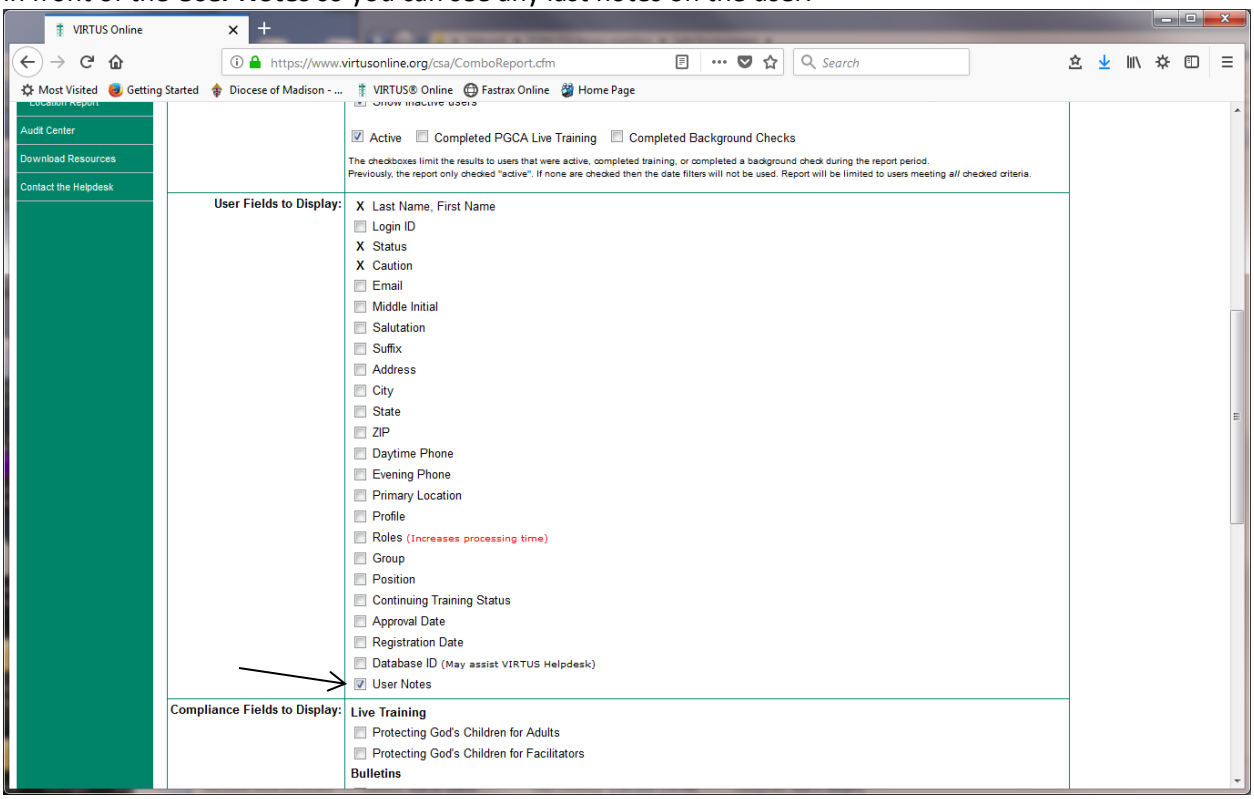
4) Within the Master Reports, first click on the drop down arrow and select the location you wish to view the report (unless your location is already showing)



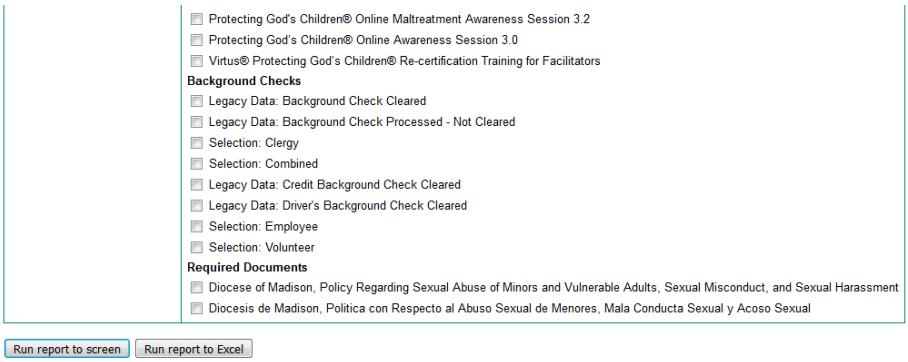
5) Next, look under the **Filters** area, seen below, and check mark the box to **Show inactive Users.**



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:

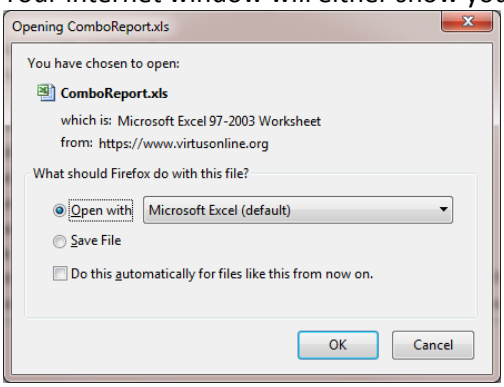


7) Continue scrolling to the bottom of the screen, there will be two options, either to view the report within your internet window (Run Report to Screen) or to view the information in Microsoft Excel. (Run Report to Excel)

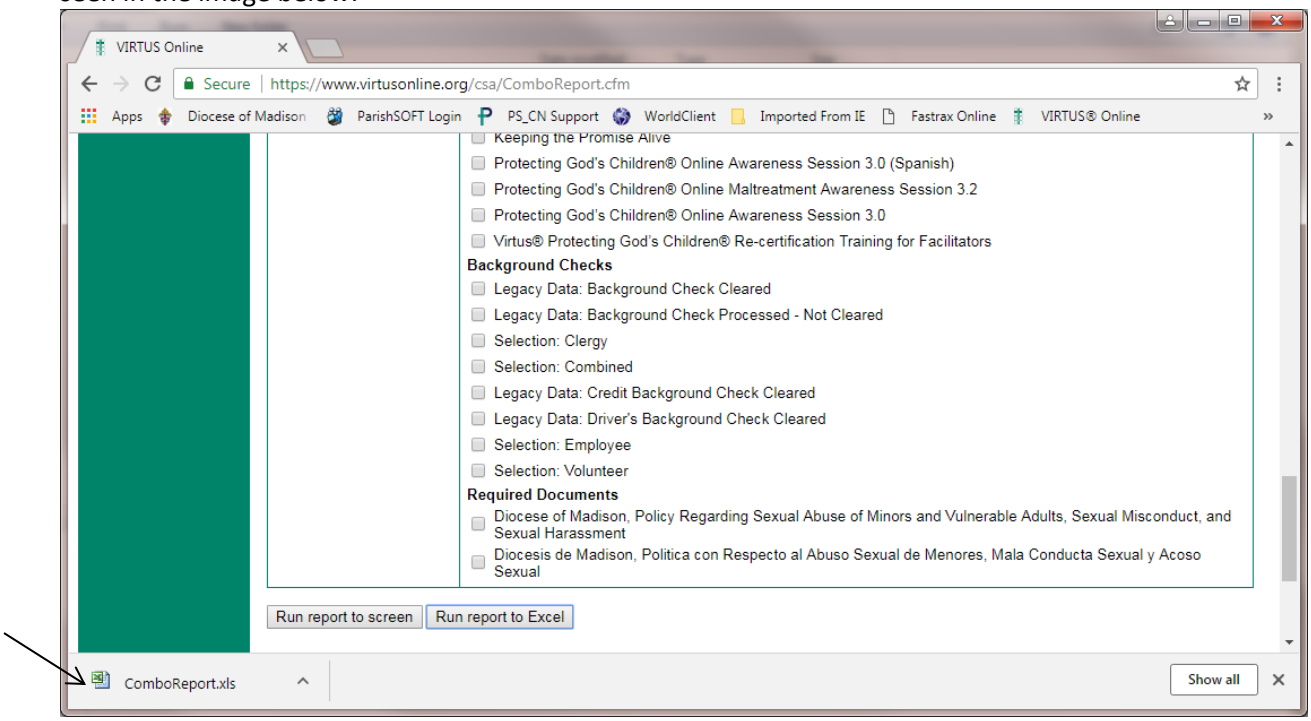


Most will want to click **Run Report to Excel.**

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

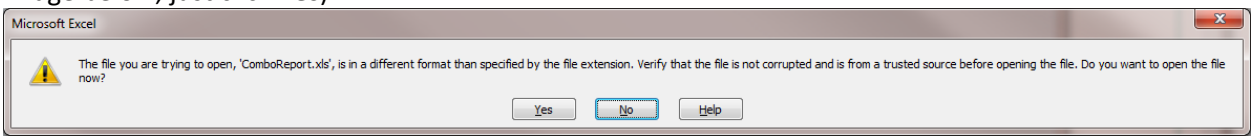


OR you may see your internet browser show you the document at the bottom of the screen, as seen in the image below:

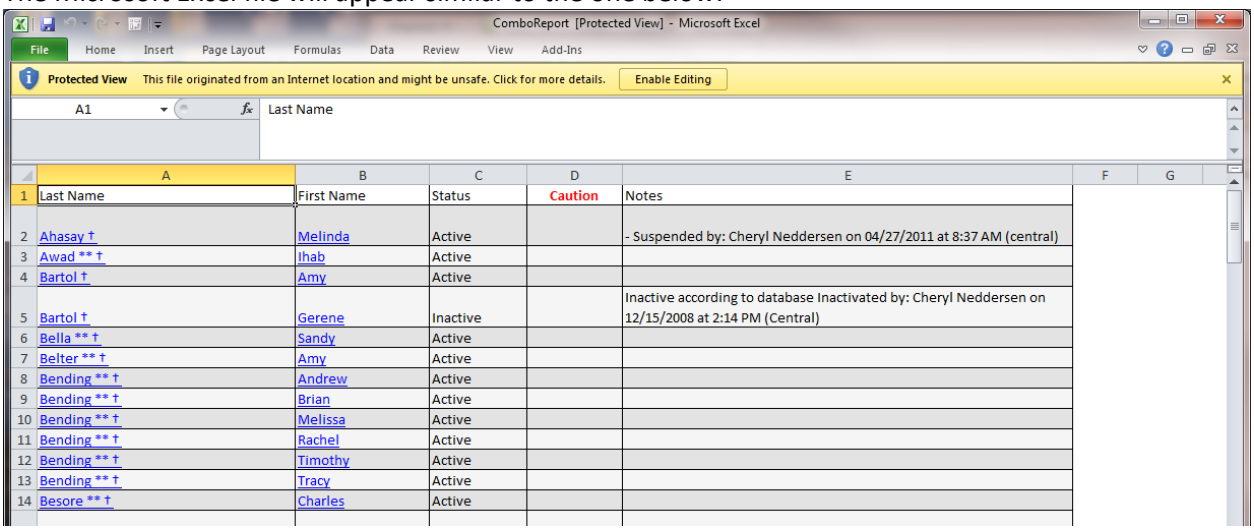


8) In either circumstance, click to open the document and you will see a document similar to the one seen below:

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

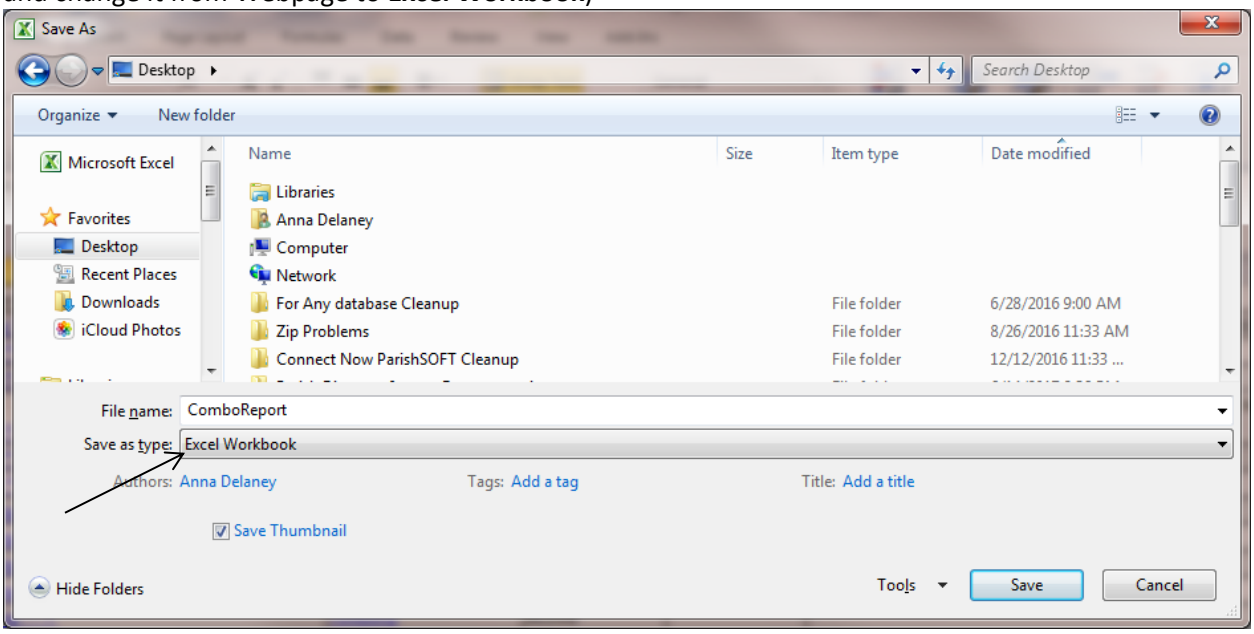


The Microsoft Excel file will appear similar to the one below:



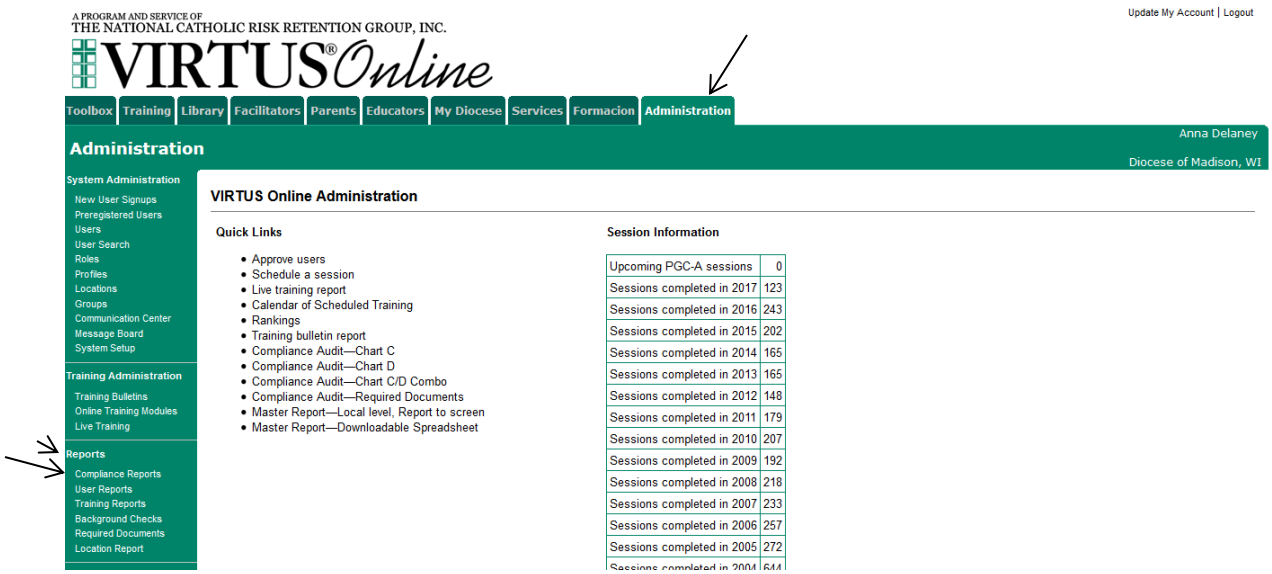
	A	B	C	D	E
1	Last Name	First Name	Status	Caution	Notes
2	Ahasay †	Melinda	Active		- Suspended by: Cheryl Neddersen on 04/27/2011 at 8:37 AM (central)
3	Awad ** †	Ihab	Active		
4	Bartol †	Amy	Active		
5	Bartol †	Gerene	Inactive		Inactive according to database Inactivated by: Cheryl Neddersen on 12/15/2008 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**)

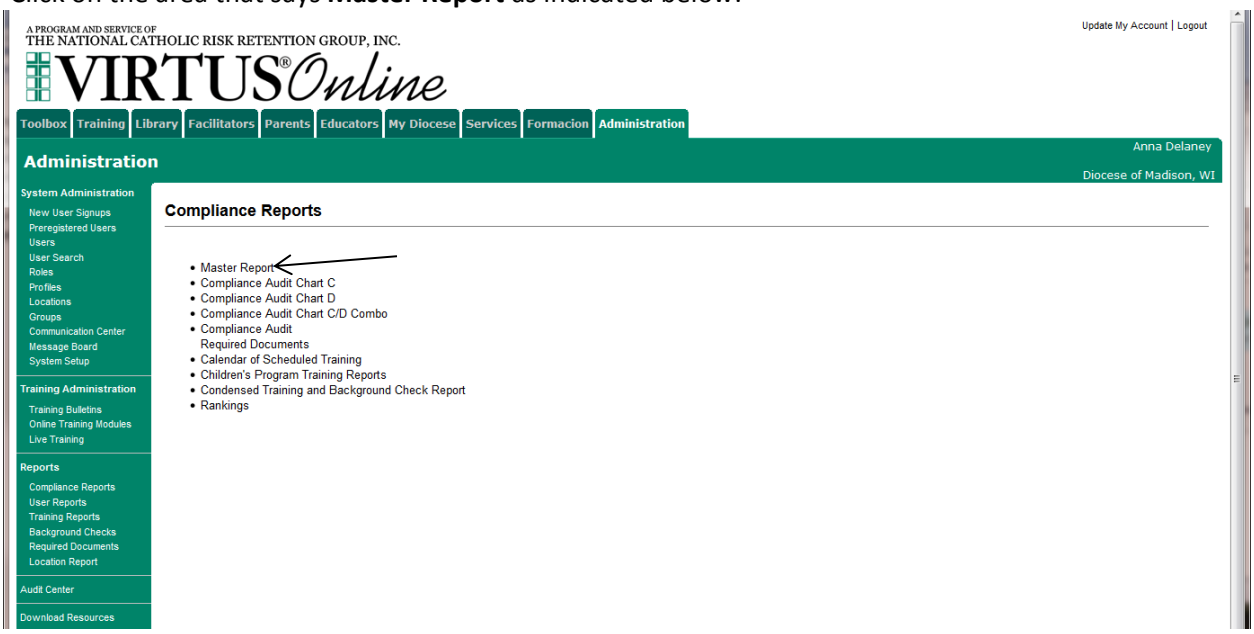


Advanced Compliance Report:

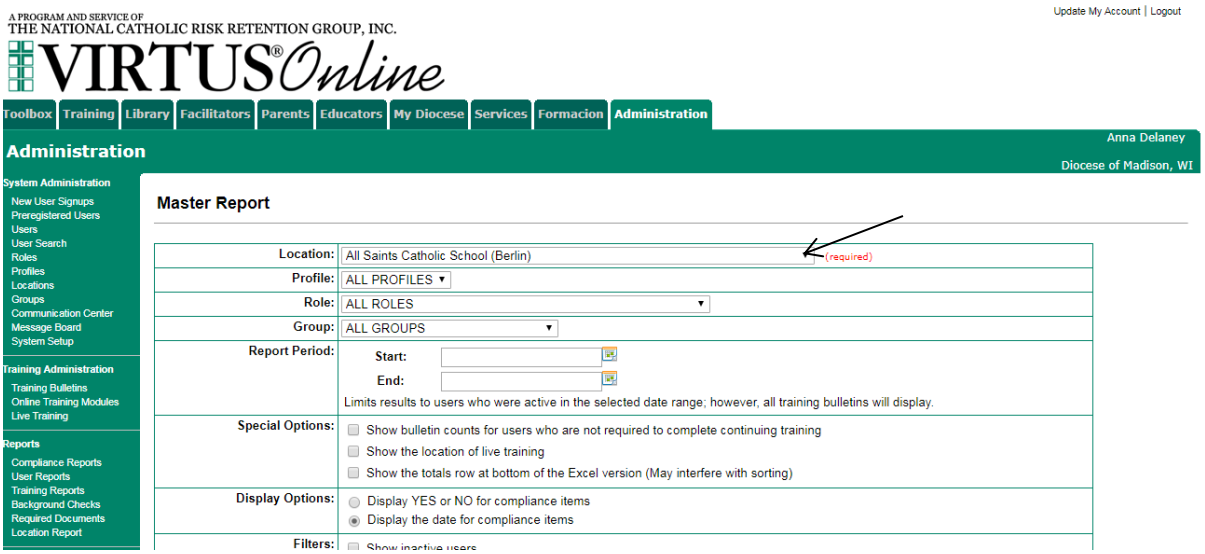
1. Please log into the Virtus online site, at the website listed here: www.virtusonline.org
2. Click on the **Administration** tab, then on the left side, under the **Reports** area, click on the **Compliance Reports**



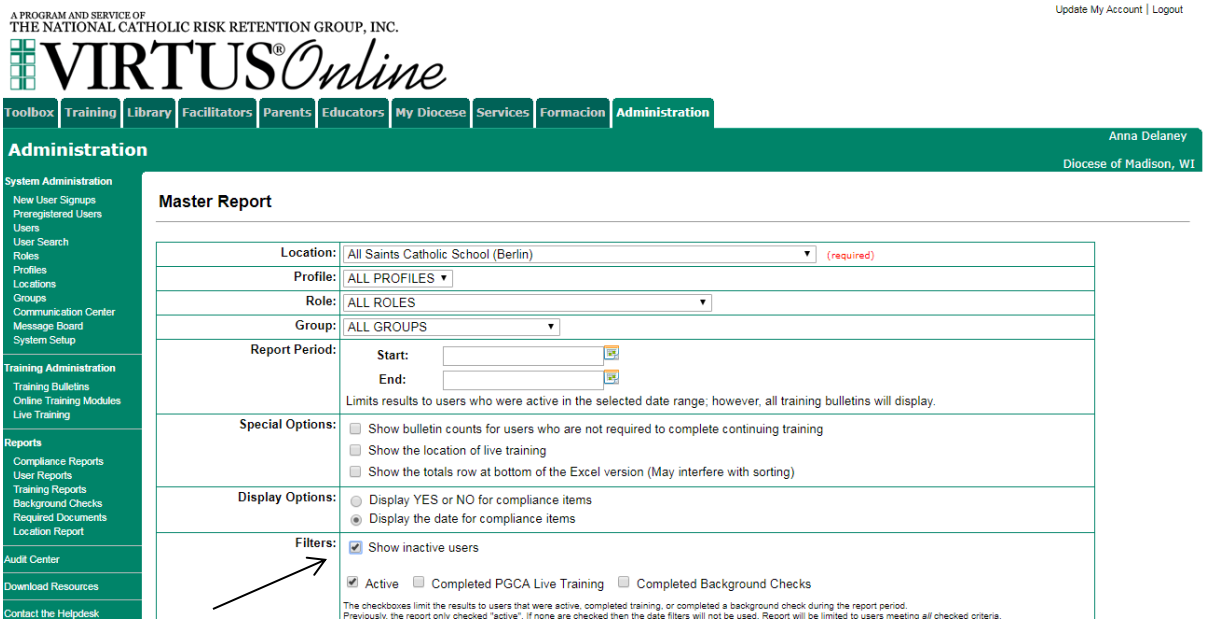
3. Click on the area that says **Master Report** as indicated below:



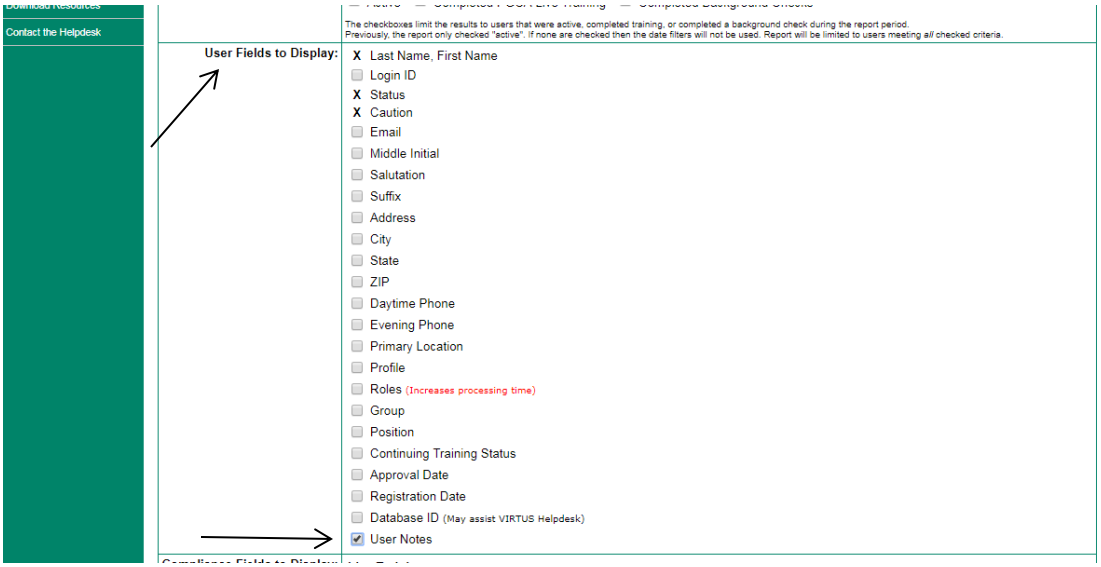
4. Within the **Master Report** again, click on the **Location** dropdown and select the location for your report.



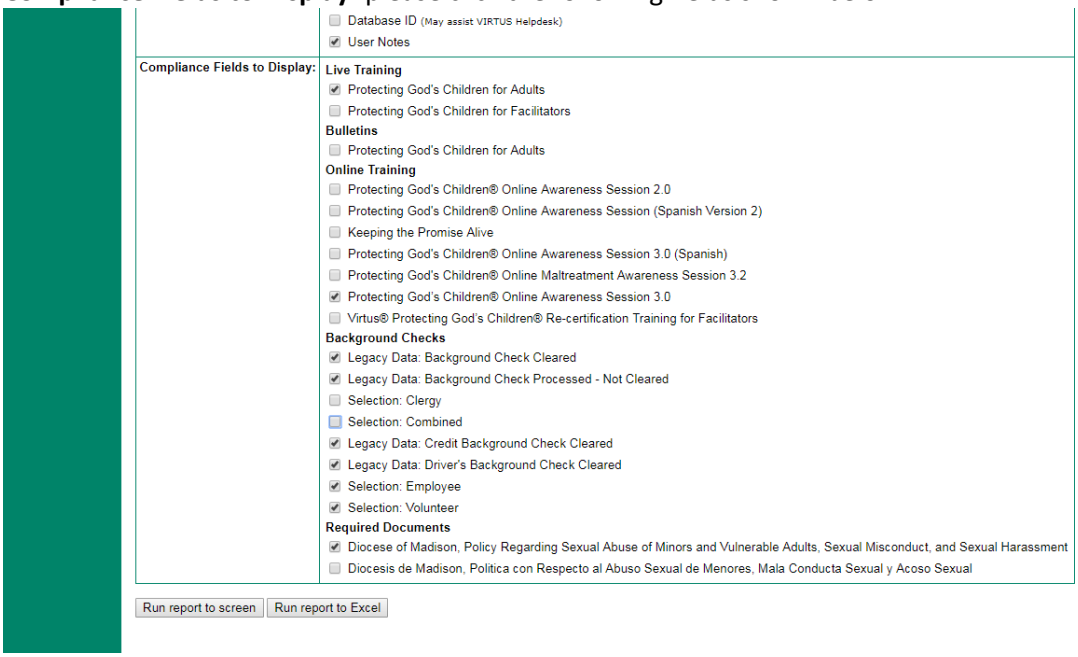
5. If you wish to verify all your users that are assigned to your location, under the **Filters,** again select the checkbox to **Show Inactive users.**



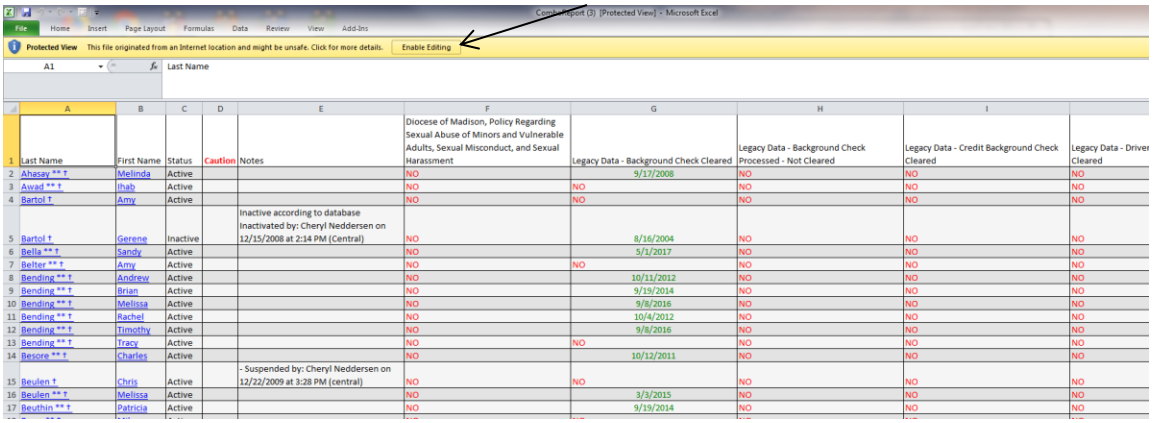
6. In the **User Fields** to Display, if you wish to see any additional information on the report, click any of the additional fields. At a minimum, click the **User Notes** field.



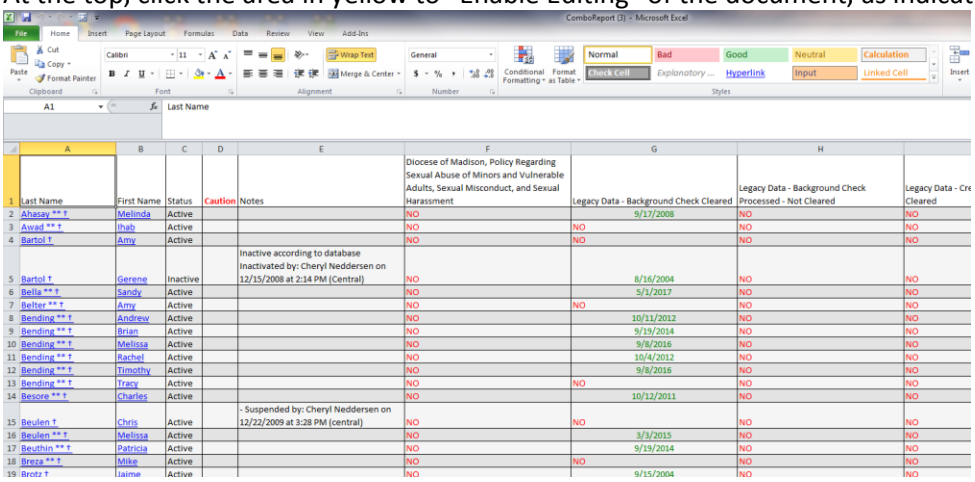
7. In order to look for all the different requirements your users have fulfilled, under the **Compliance Fields to Display:** please click the following fields shown below:



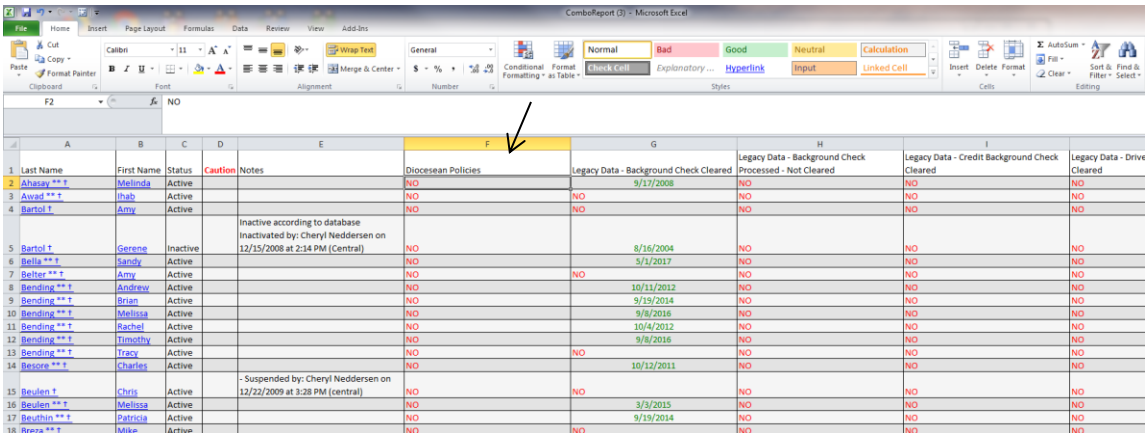
8. Click the button at the bottom to **Run Report to Excel**
9. Open the document from your internet browser to view it in Excel, as seen below:



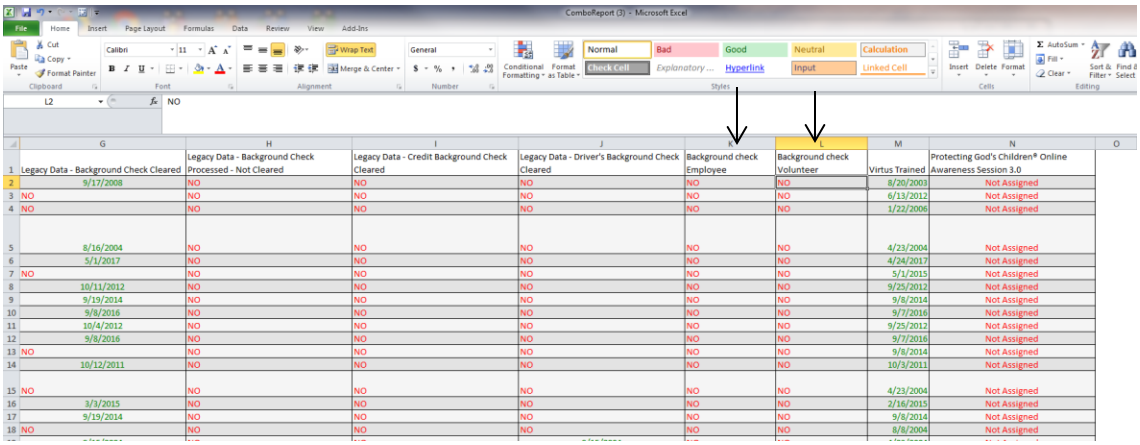
10. At the top, click the area in yellow to "Enable Editing" of the document, as indicated above.



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

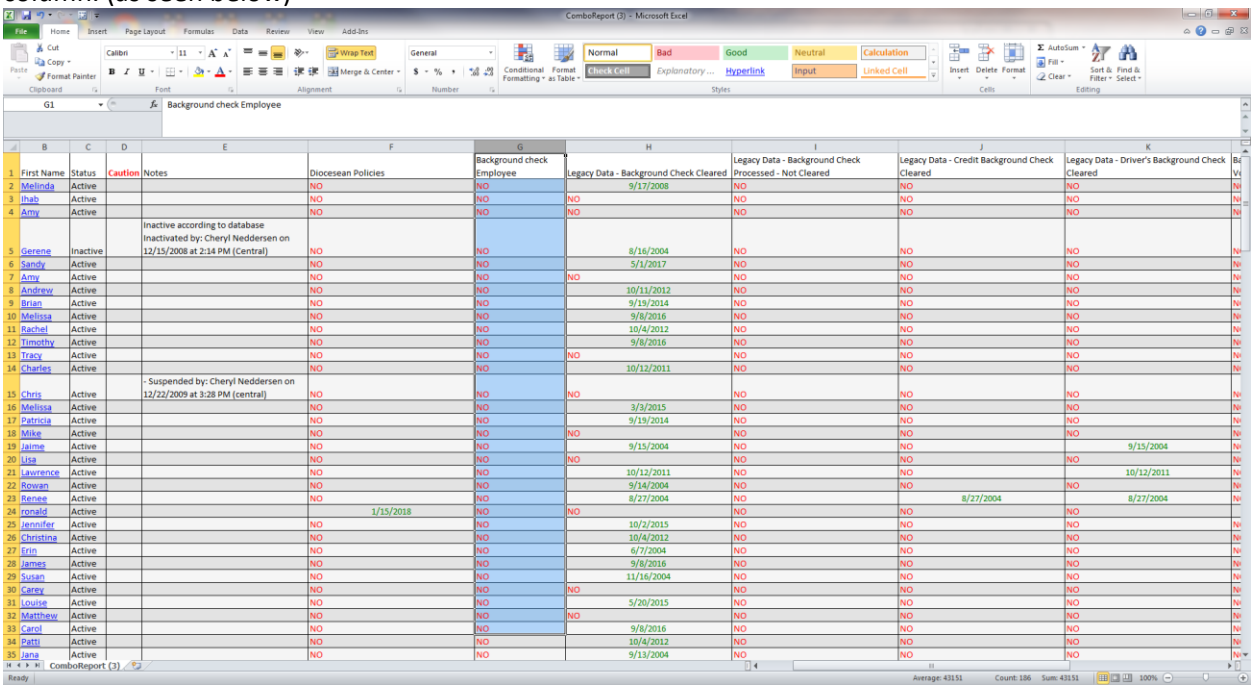


12. Scroll over till you see the columns K and L. These are titled: Selection –Employee and Selection –Volunteer. Please replace those titles with the words Background check Employee and Background check Volunteer



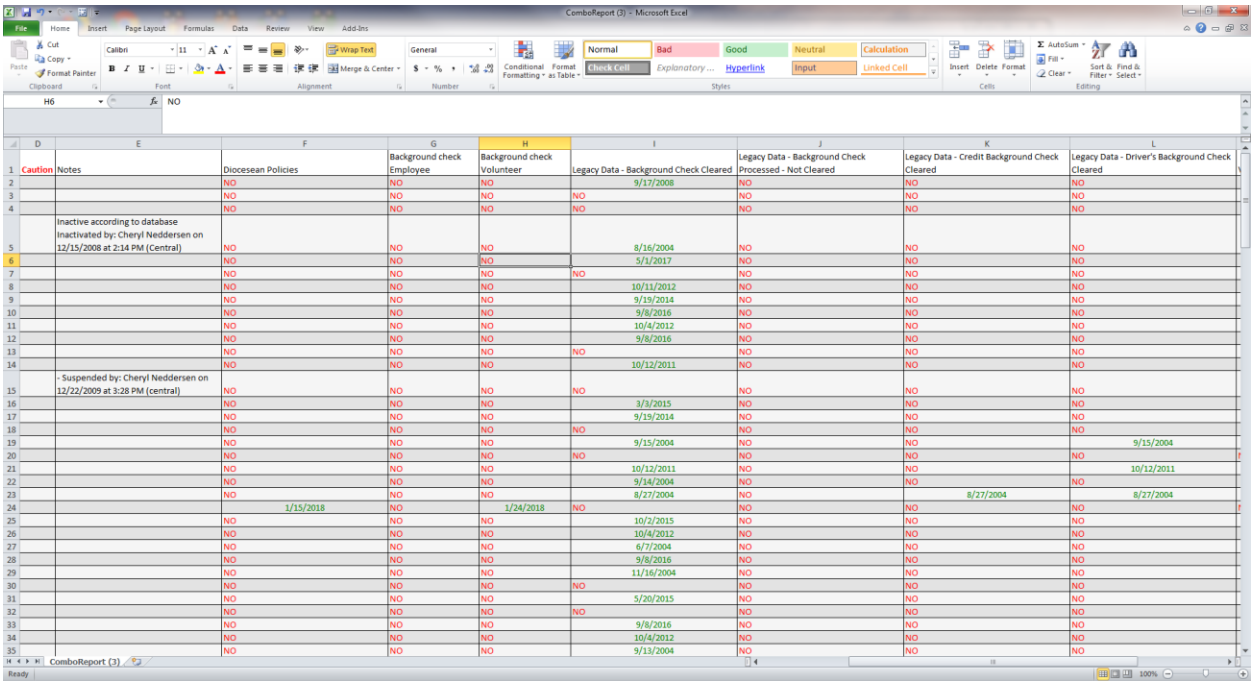
	G	H	I	J	K	L	M	N
1	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver's Background Check Cleared	Background check Employee	Background check Volunteer	Virtus Trained	Protecting God's Children® Online Awareness Session 3.0
2	9/17/2008	NO	NO	NO	NO	NO	8/20/2003	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	4/23/2004	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	2/16/2015	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 in right after the Diocesan Policies column. (as seen below)



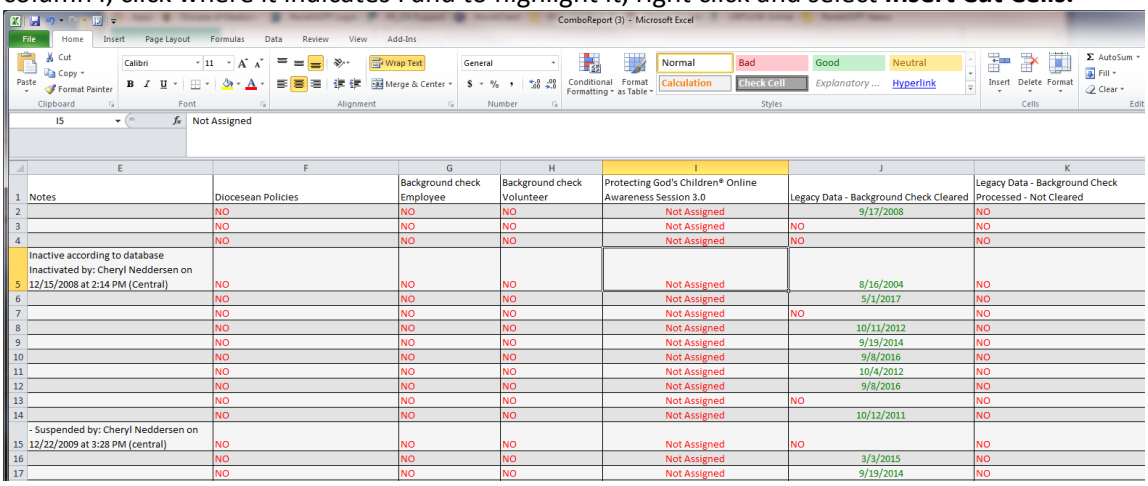
	B	C	D	E	F	G	H	I	J	K
1	First Name	Status	Caution	Notes	Diocesean Policies	Background check Employee	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver's Background Check Cleared
2	Melinda	Active			NO	NO	9/17/2008	NO	NO	NO
3	Ihab	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			NO	NO	10/12/2011	NO	NO	NO
15	Chris	Active		- Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	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	Jaime	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	Rowan	Active			NO	NO	9/14/2004	NO	NO	NO
23	Renee	Active			NO	NO	8/27/2004	NO	8/27/2004	8/27/2004
24	ronald	Active			1/15/2018	NO	NO	NO	NO	NO
25	Jennifer	Active			NO	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	Carey	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	Jana	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.**



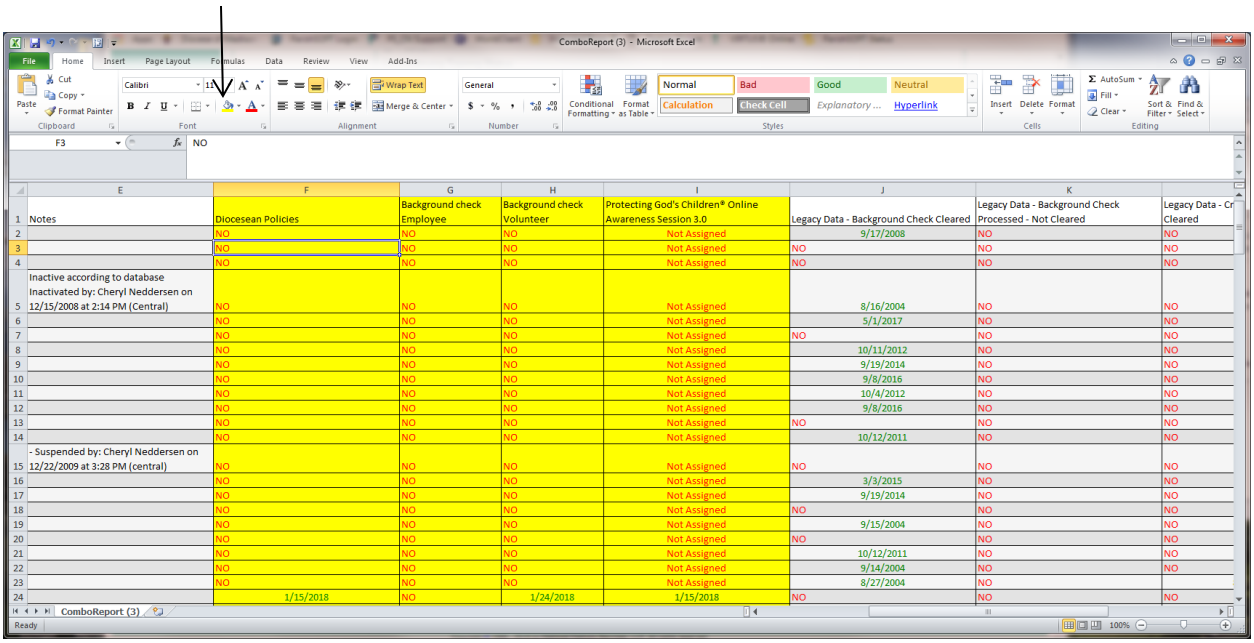
	D	E	F	G	H	I	J	K	L
1	Caution	Notes	Diocesean Policies	Background check Employee	Background check Volunteer	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Credit Background Check Cleared	Legacy Data - Driver's Background Check Cleared
2			NO	NO	NO	9/17/2008	NO	NO	NO
3			NO	NO	NO	NO	NO	NO	NO
4			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	5/1/2017	NO	NO	NO
7			NO	NO	NO	NO	NO	NO	NO
8			NO	NO	NO	10/11/2012	NO	NO	NO
9			NO	NO	NO	9/19/2014	NO	NO	NO
10			NO	NO	NO	9/8/2016	NO	NO	NO
11			NO	NO	NO	10/4/2012	NO	NO	NO
12			NO	NO	NO	9/8/2016	NO	NO	NO
13			NO	NO	NO	NO	NO	NO	NO
14			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	3/3/2015	NO	NO	NO
17			NO	NO	NO	9/19/2014	NO	NO	NO
18			NO	NO	NO	NO	NO	NO	NO
19			NO	NO	NO	9/15/2004	NO	NO	9/15/2004
20			NO	NO	NO	NO	NO	NO	NO
21			NO	NO	NO	10/12/2011	NO	NO	10/12/2011
22			NO	NO	NO	9/14/2004	NO	NO	NO
23			NO	NO	NO	8/27/2004	NO	8/27/2004	8/27/2004
24			1/15/2018	NO	1/24/2018	NO	NO	NO	NO
25			NO	NO	NO	10/2/2015	NO	NO	NO
26			NO	NO	NO	10/4/2012	NO	NO	NO
27			NO	NO	NO	6/7/2004	NO	NO	NO
28			NO	NO	NO	9/8/2016	NO	NO	NO
29			NO	NO	NO	11/16/2004	NO	NO	NO
30			NO	NO	NO	NO	NO	NO	NO
31			NO	NO	NO	5/20/2015	NO	NO	NO
32			NO	NO	NO	NO	NO	NO	NO
33			NO	NO	NO	9/8/2016	NO	NO	NO
34			NO	NO	NO	10/4/2012	NO	NO	NO
35			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.**



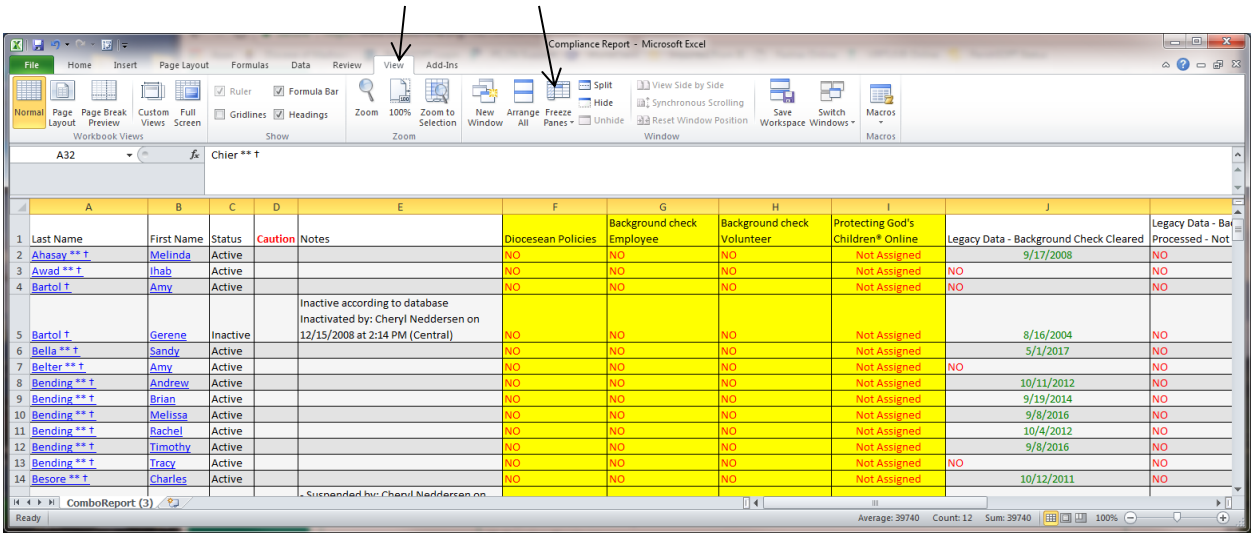
	E	F	G	H	I	J	K
1	Notes	Diocesean Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online Awareness Session 3.0	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared
2		NO	NO	NO	Not Assigned	9/17/2008	NO
3		NO	NO	NO	Not Assigned	NO	NO
4		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	Not Assigned	5/1/2017	NO
7		NO	NO	NO	Not Assigned	NO	NO
8		NO	NO	NO	Not Assigned	10/11/2012	NO
9		NO	NO	NO	Not Assigned	9/19/2014	NO
10		NO	NO	NO	Not Assigned	9/8/2016	NO
11		NO	NO	NO	Not Assigned	10/4/2012	NO
12		NO	NO	NO	Not Assigned	9/8/2016	NO
13		NO	NO	NO	Not Assigned	NO	NO
14		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	Not Assigned	3/3/2015	NO
17		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:



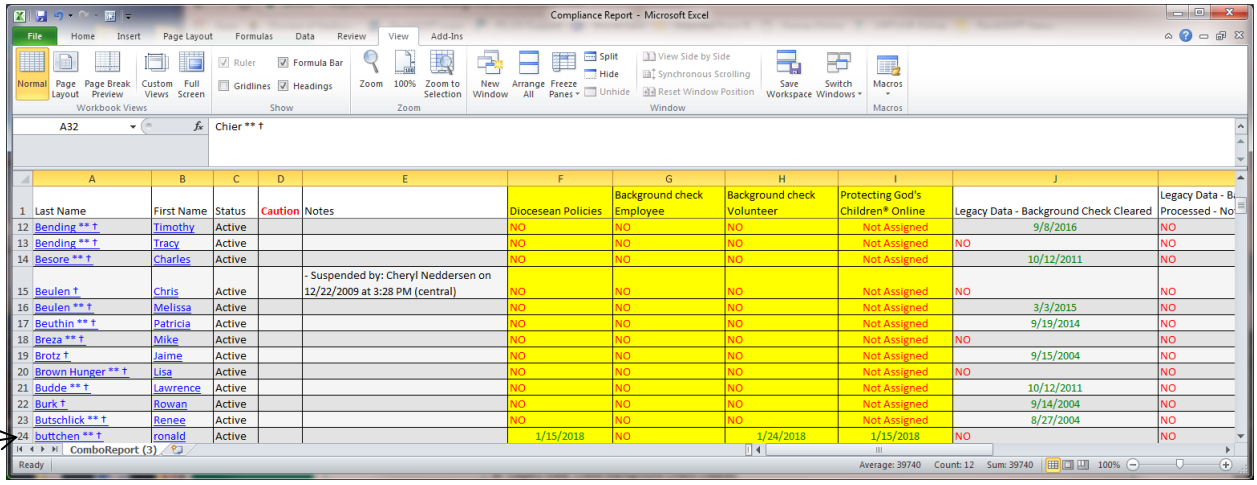
	E	F	G	H	I	J	K	
1	Notes	Diocesean Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online Awareness Session 3.0	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - Not Cleared	Legacy Data - Cr Cleared
2		NO	NO	NO	Not Assigned	9/17/2008	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	
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	
1	Last Name	First Name	Status	Caution	Notes	Diocesean Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online	Legacy Data - Background Check Cleared	Legacy Data - Ba Processed - Not
2	Ahasay ** †	Melinda	Active			NO	NO	NO	Not Assigned	9/17/2008	NO
3	Awad ** †	Ihab	Active			NO	NO	NO	Not Assigned	NO	NO
4	Bartol †	Amy	Active			NO	NO	NO	Not Assigned	NO	NO
5	Bartol †	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 ** †	Sandy	Active			NO	NO	NO	Not Assigned	5/1/2017	NO
7	Belter ** †	Amy	Active			NO	NO	NO	Not Assigned	NO	NO
8	Bending ** †	Andrew	Active			NO	NO	NO	Not Assigned	10/11/2012	NO
9	Bending ** †	Brian	Active			NO	NO	NO	Not Assigned	9/19/2014	NO
10	Bending ** †	Melissa	Active			NO	NO	NO	Not Assigned	9/8/2016	NO
11	Bending ** †	Rachel	Active			NO	NO	NO	Not Assigned	10/4/2012	NO
12	Bending ** †	Timothy	Active			NO	NO	NO	Not Assigned	9/8/2016	NO
13	Bending ** †	Tracy	Active			NO	NO	NO	Not Assigned	NO	NO
14	Besore ** †	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:



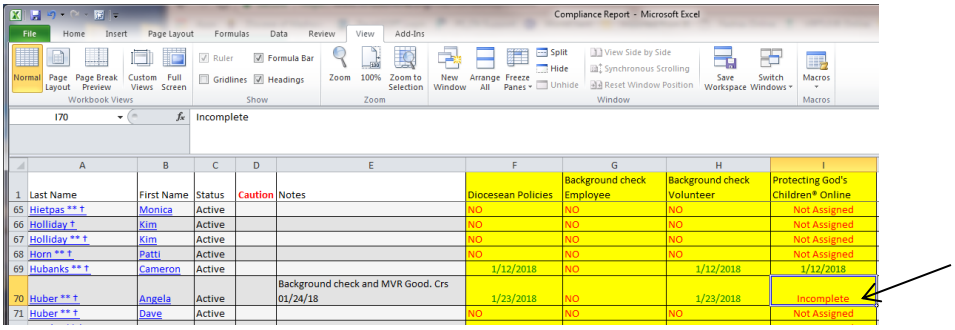
	Last Name	First Name	Status	Caution	Notes	Diocesean Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online	Legacy Data - Background Check Cleared	Legacy Data - Background Check Processed - No
12	Bending ** †	Timothy	Active			NO	NO	NO	Not Assigned	9/8/2016	NO
13	Bending ** †	Tracy	Active			NO	NO	NO	Not Assigned	NO	NO
14	Besore ** †	Charles	Active			NO	NO	NO	Not Assigned	10/12/2011	NO
15	Beulen †	Chris	Active		- Suspended by: Cheryl Neddersen on 12/22/2009 at 3:28 PM (central)	NO	NO	NO	Not Assigned	NO	NO
16	Beulen ** †	Melissa	Active			NO	NO	NO	Not Assigned	3/3/2015	NO
17	Beuthin ** †	Patricia	Active			NO	NO	NO	Not Assigned	9/19/2014	NO
18	Breza ** †	Mike	Active			NO	NO	NO	Not Assigned	NO	NO
19	Brotz †	Jaime	Active			NO	NO	NO	Not Assigned	9/15/2004	NO
20	Brown Hunger ** †	Lisa	Active			NO	NO	NO	Not Assigned	NO	NO
21	Budde ** †	Lawrence	Active			NO	NO	NO	Not Assigned	10/12/2011	NO
22	Burk †	Rowan	Active			NO	NO	NO	Not Assigned	9/14/2004	NO
23	Butschlick ** †	Renee	Active			NO	NO	NO	Not Assigned	8/27/2004	NO
24	buttchen ** †	ronald	Active			1/15/2018	NO	1/24/2018	1/15/2018	NO	NO

If the user has either of the background check's present, then the background check was completed. (either the background check for an employee/educator or a volunteer)

Please note, there should be a date filled in for all three aspects needed for training:
Diocesan Policies,
Background check (Employee or Volunteer) and
Protecting God's Children training

If the individual has dates in one or two and not all, they may need to be looked up individually in Virtus to decide if they have all they need to remain Active (unless they are already marked Inactive)

You may also see something similar to below, where the training is incomplete and still needs to be finished:



	Last Name	First Name	Status	Caution	Notes	Diocesean Policies	Background check Employee	Background check Volunteer	Protecting God's Children® Online
65	Hietpas ** †	Monica	Active			NO	NO	NO	Not Assigned
66	Holliday †	Kim	Active			NO	NO	NO	Not Assigned
67	Holliday ** †	Kim	Active			NO	NO	NO	Not Assigned
68	Horn ** †	Patti	Active			NO	NO	NO	Not Assigned
69	Hubanks ** †	Cameron	Active			1/12/2018	NO	1/12/2018	1/12/2018
70	Huber ** †	Angela	Active		Background check and MVR Good. Crs 01/24/18	1/23/2018	NO	1/23/2018	Incomplete
71	Huber ** †	Dave	Active			NO	NO	NO	Not Assigned

19. For those members that do NOT have information listed in the yellow collumns, these are older "Legacy" data which was pulled in from the older Safe Environment system. Please check the columns that say "Legacy Data- Background Check Cleared" that typically needs to be check marked with a date along with the final "Virtus Trained" column, which indicates that they accomplished the Virtus training and a basic background check.
20. If any of these dates are missing, please look up the user individually in Virtus to verify their status, or contact the Office of Safe Environment to verify how to get their training complete.

Please note, since this list includes some Inactive users, some you may skip over if they are no longer current employees or volunteers.