

## Verifying a User has completed their requirements in Virtus:

Local Administrators can verify that someone has completed their training by logging into Virtus Online to search and check on an individual.

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

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# VIRTUS<sup>®</sup>Online

Toolbox Training Library Parents My Diocese **Administration**

**Administration** Anna Delaney - Local Admin  
Diocese of Madison, WI

**VIRTUS Online Administration for Local Administrators**

**System Administration**  
New User Signups  
Users  
User Search

**Training Administration**  
Training Bulletins  
Online Training Modules  
Live Training

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

**Audit Center**

**Download Resources**

**Quick Links**

- Live training report
- Calendar of Scheduled Training
- Training bulletin report
- Compliance Audit—Chart C/D Combo
- Compliance Audit—Required Documents
- Master Report—Local level, Report to screen
- New Master Report (updated for 2019)

**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

- 2) Next, on the left navigation bar, click on the words: **User Search** (highlighted below). Your screen should appear similar to below. Make sure the checkmark to “**Show Inactive Users**” as seen below, enter in the last name of the individual, and click **Go**.

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**Contact the Helpdesk**

**User Search**

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

Show inactive users: ☒

**Go**

- 3) You will see results, as seen below:



[Toolbox](#) [Training](#) [Library](#) [Parents](#) [My Diocese](#) [Administration](#)

Anna Delaney - Local Admin

Diocese of Madison, WI

## Administration

### System Administration

[New User Signups](#)  
[Users](#)  
[User Search](#)

### Training Administration

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

### Reports

[Compliance Reports](#)  
[User Reports](#)  
[Training Reports](#)  
[Background Checks](#)  
[Required Documents](#)  
[Location Report](#)

### Audit Center

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## User Search

Enter a piece of information about the user:

(user id, first, last, email)

Show inactive users: ☒

## Search Results for: smith

144 matches found.

Last Name	First Name	Middle Name	User ID	User Email	Status	Trained
Cantwell-Smith --	Kathleen	A	richiesmith	kathyc@salonsystems.com	Active User	08/24/2005 8:00 PM
Goldsmith --	Nancy		nancy.goldsmith-16898		Inactive user	
Goldsmith --	Russ		russ.goldsmith-16899		Inactive user	
Kopplin-Smith --	Holly	Susan	hksmith	smithsquad@sbcglobal.net	Active User	07/30/2019 11:28 AM
mccann-smith --	wanda		wandamccannsmith@yahoo.com	wandamccannsmith@yahoo.com	Inactive user	09/30/2015 8:00 PM
Smith --	Aaron	Gene	asmith87654	aaronandsarahsmith@gmail.com	Active User	08/13/2013 8:00 PM
Smith --	Alana	R	alana.r.s.10		Inactive user	08/22/2016 3:00 PM
Smith --	Amy	L	aldeboe	aldeboe@yahoo.com	Active User	01/14/2006 9:00 AM
Smith --	Amy	Lynn Cotter	rsmith@charter.net	rsmith@charter.net	Active User	09/15/2004 8:00 PM
Smith --	Andrea		andrea.smith-41378	smith.andrea@live.com	Active User	09/10/2014
Smith --	Andrew		andrew.smith-28439		Inactive user	
Smith --	Ann	M	asmi14	asmi14@yahoo.com	Inactive user	05/16/2005 8:00 PM
Smith --	Anne		mugan	anne.m.smith@win-na.com	Active User	09/14/2004 8:30 PM

Please note that these are search results for ALL PARISHES/SCHOOLS in the Diocese of Madison and that you are viewing both historical records (marked Inactive as seen above) and currently Active records. To view the details of a member that is at another parish, click on their name to see more information. This area will ALSO show a member if they are still in the **New User Signups** area at the other parish. (a good way to check on a member if they accidentally signed up for the wrong parish)

- 4) If the user is still in the **New User Signups** (they will be in the pending status) and their information will appear similar to the record below: (if they are not New Users, go to step 5))
  - i. First, check that they signed up for the correct parish/school location and that their **Role** is correct.

## Approve User

User ID:

Salutation:

First Name:

Middle Name:

Last Name:

Email:

More Contact Info: [\(Click here for more contact info\)](#)

Primary Location:

Additional Locations: [\(Click to select locations...\)](#)

Roles:

[\(Click to select roles...\)](#)

Title or Diocesan Function:

Group:

Contact w/ Minors?:

Supervisor or Manager?:

ii. Second, check what is required, by scrolling down to the bottom of the screen, as seen below. In the record below, we can tell that the background check is waiting to be released OR it's still processing. The order for a new users in completing the requirements is:

1. Required Documents –Sign off first
2. Training Session – Completed 2<sup>nd</sup>
3. Background check- Complete 3<sup>rd</sup>.

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<b>Background Check:</b>	Selection: Employee - 08/09/19 - pending <a href="#">(View background check info for this user...)</a> <a href="#">(Force background check prompt...)</a>
<b>Required documents:</b>	<a href="#">(View required document info for this user...)</a> <a href="#">(Force required document prompt...)</a>

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<b>Training session:</b>	Protecting God's Children® Online Awareness Session 3.0 8/9/2019 10:14 AM Online <a href="#">Online Training Completed</a>
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<b>Notes:</b>	<div></div>
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- iii. If the user is missing any of the three required areas above, (say the logged in initially, then exited out and logged back in) as local administrators, we will need to follow up with the user to ask them to complete this information. In the screen above, we can see that the training is completed, and if we click on the link to "View required document info for this user" we would see that they've completed that also.
- iv. On the record above, we're just waiting for the background check to finish. Either we need to go into Fastrax and release the background check, OR, if we've already don't that, it's just finishing processing.

5) All other users, either Active or Inactive will appear similar to the record below:

## Delaney, Anna

General	Contact Info	Background Check	Required Documents	Training
<p>User ID: <input type="text" value="annadelaney"/></p> <p>Password: <input type="password" value="....."/></p> <p>Salutation: <input type="text" value="- Please select -"/></p> <p>First Name: <input type="text" value="Anna"/></p> <p>Middle Name: <input type="text" value=""/></p> <p>Last Name: <input type="text" value="Delaney"/></p> <p>Email: <input type="text" value=""/> <input type="button" value="Email account info"/></p>				
<p>Primary Location: <input type="text" value="Madison - Diocese of Madison Chancery (Madison)"/></p> <p>Additional Locations: <a href="#">(Click to add or remove locations...)</a></p> <p>Roles: <input checked="" type="checkbox"/> Employee <input checked="" type="checkbox"/> <a href="#">(Click to add or remove roles...)</a></p> <p><input checked="" type="checkbox"/> = primary role as defined by USCCB</p> <p>Title or Function: <input type="text" value="Employee"/></p> <p>External (diocese) ID: <input type="text" value=""/></p> <p>Group: <input type="text" value="Diocesan Offices"/></p> <p>Contact w/ Minors?: <input type="text" value="Yes"/></p> <p>Supervisor or Manager?: <input type="text" value="No"/></p>				

If the top of the record does NOT say Inactive, as seen below, highlighted in Yellow for this example. Typically, as seen in the example below, the **Primary Location** is also Unknown.

## Delaney, Stephanie (Inactive)

General	Contact Info	Background Check	Required Documents	Training
<p>User ID: <input type="text" value="mommy4life"/></p> <p>Password: <input type="password" value="....."/></p> <p>Salutation: <input type="text" value="Ms."/></p> <p>First Name: <input type="text" value="Stephanie"/></p> <p>Middle Name: <input type="text" value=""/></p> <p>Last Name: <input type="text" value="Delaney"/></p> <p>Email: <input type="text" value=""/> <input type="button" value="Email account info"/></p>				
<p>Primary Location: <input type="text" value="Unknown Location"/></p> <p>Additional Locations: <a href="#">(Click to add or remove locations...)</a></p> <p>Roles: <i>No roles selected</i> <a href="#">(Click to add or remove roles...)</a></p> <p><input checked="" type="checkbox"/> = primary role as defined by USCCB</p> <p>Title or Function: <input type="text" value="Child Care Teacher"/></p>				

For more information on the individual, please scroll to the bottom to the **Notes:** area, as we can see in the user below. (They need to finish their training, as indicated in the notes)

**Notes:** Background check good, cannot volunteer until training is completed. Sent email to Julie on 06/12/18 Crs 06/12/18

- 6) If you are **double checking** the status of a user, go to the top tabs in green, and click on each of the following, highlighted in yellow below:

**Delaney, Anna**

**General** **Contact Info** **Background Check** **Required Documents** **Training**

User ID: annadelaney  
Password: .....  
Salutation: - Please select - ▼  
First Name: Anna  
Middle Name:   
Last Name: Delaney  
Email: .....@...org [Email account info](#)

Primary Location: Madison - Diocese of Madison Chancery (Madison) ▼  
Additional Locations: [\(Click to add or remove locations...\)](#)  
Roles: Employee ✓  
[\(Click to add or remove roles...\)](#)  
✓ = primary role as defined by USCCB  
Title or Function: Employee  
External (diocese) ID:   
Group: Diocesan Offices ▼  
Contact w/ Minors?: Yes ▼  
Supervisor or Manager?: No ▼

- a. **Background Check:** your screen should appear similar to below:

**General** **Contact Info** **Background Check** **Required Documents** **Training**

**Background Screening**

Date	Type & Provider	Name Submitted	Run By	Report Location	Comments	Complete	Status
07/23/2019	Credit Background Check Cleared <b>Selection</b>	Joseph Thompson	Anna Delaney			Yes	
07/19/2019	Employee <b>Selection</b>		REGISTRATION	Madison, WI		Yes	Approved
10/25/2005	Background Check Cleared Legacy Data					Yes	

[Force Background Check Prompt](#)

Please note that **Selection** highlighted in Yellow above is a current background check in Fastrax. The user above has both an Employee and a Credit check that was processed and completed (see Completed column)

- b. **Required Documents:** your screen should appear similar to below: We see the historical record on 10/12/05 and that the user updated and re-signed off the documents on 7/19/19

**General** **Contact Info** **Background Check** **Required Documents** **Training**

**Required Documents**

Document	Date Received	Recorded By	Comments
Diocese of Madison, Policy Regarding Sexual Abuse of Minors and Vulnerable Adults, Sexual Misconduct, and Sexual Harassment	07/19/2019	Self Signup	
Statement of Receipt and Agreement (import)	10/12/2005		



Force Required Document Prompt

- c. **Training:** your screen should appear similar to below. The user's original training was a Live Training listed on 11/08/05 and then they did the Online Protecting God's Children for Adults on 7/19/19 and that shows under both the **Live Training** and the **Online Training Modules**. (even though they took just one course, it shows up in two spots)

**General** **Contact Info** **Background Check** **Required Documents** **Training**


Approval Date: 07/23/2019

**LIVE TRAINING**

Title	Date	Training Location	Status
Protecting God's Children for Adults	07/19/2019 3:20 PM	Online	Approved 
Protecting God's Children for Adults	11/08/2005 6:30 PM	St. Peter Parish (Madison)	Approved 

[Add this user to an upcoming session](#)

**ONLINE TRAINING MODULES**

Module	Assigned	Started	Completed
Protecting God's Children® Online Awareness Session 3.0	07/19/19	07/19/19	07/19/19 

[Assign training to this user](#)

In the circumstance above, the user may have been changing their roles, (going from Volunteer to Employee) which is why they were asked to re-do their requirements.