



## Diocese of Helena VIRTUS Local Administrators Guide

### Role of VIRTUS Local Admins

As highlighted in the Safe Environment Policy Quick Guide, each Parish, School, or Ministry leader needs to identify a local administrator who is responsible for:

- Tracking employee and volunteer compliance with all VIRTUS and safe environment requirements in their location(s);
- Ensuring that youth trainings are conducted annually and that reports are submitted into VIRTUS by their location(s) prior to the spring deadline of May 31 each year;
- Serving as a point of contact for the Safe Environment/VIRTUS staff at the Diocesan level and assisting with policy implementation and communication at the local level.

On the Annual Attestation of Policy Implementation form (due by June 30 each year), each Parish, School, or Ministry location leader is asked to confirm the name and email address of their designated VIRTUS Local Administrator. Changes to local administrators that happen mid-year should be communicated in a timely manner to the **Diocesan VIRTUS Coordinator**:

- **Phone number:** (406) 442-5820 | **Fax:** (406) 442-5191
- **Email address:** [cfcladmin@dohmt.org](mailto:cfcladmin@dohmt.org)
- **Mailing address:** PO Box 1729, Helena, MT 5924

Local Administrators are given access to several reports and features in the VIRTUS system that will assist them with helping their location or entity maintain compliance. This guide offers more detailed information about these responsibilities and resources.

### Managing Employee and Volunteer Lists

One of the most difficult responsibilities of a VIRTUS local administrator is keeping an up-to-date list of the employees and volunteers at your location. Regular monitoring of your location's list should be done ***on a weekly basis*** so that you can identify:

- Which employees/volunteers are no longer active at your location
- Which employees/volunteers need help with compliance
- Most importantly, which employees/volunteers are NOT on your list but should be!

Changes pertaining to the status of an employee or volunteer should be reported ***weekly*** to the Diocesan VIRTUS coordinator at the contact information provided above.

## Tracking Employee and Volunteer Compliance

Before being able to track the compliance status with VIRTUS for your location(s), you must know what is needed to be compliant. These are the three steps that every employee and volunteer must complete after registering for their VIRTUS account but ***before beginning service***:

- 1) **Background Check** – reports can take 3-5 business days to come back, and sometimes longer
- 2) **Policy Acceptance**
- 3) **Protecting God's Children Training** – new employees have up to 30 days after the date of hire to complete the initial training requirement, but they are encouraged to do so right away

It is also important to know that when an employee or a volunteer registers for a VIRTUS account they must provide an email address, which is how VIRTUS communicates with the user to provide reminders about ongoing training (monthly bulletins), background check renewal notices, etc.

**Background Check:** A background check that is clear of any disqualifying activity is required ***before*** the start date of employment or volunteer service. This background check will be good for five years. For those without computer access, paper forms are available for the user to fill out and they can be sent to the office by mail, fax, or secure (encrypted) email. If the user is unable to complete the background check submission through their VIRTUS account, please provide one of the links below. It is important to understand that the links are different, and they should be provided depending on the type of user.

- **Background check entry form for NEW users only:**  
<https://www04.8f7.com/4DACTION/WebAppOrderEntryZCustom/American/14003>
- **Background check entry form for RENEWALS (every five years) only:**  
<https://www04.8f7.com/4DACTION/WebAppOrderEntryZCustom/American/8213>

**Policy Acceptance:** Each VIRTUS user is required to read and sign off on the Diocese of Helena Safe Environment/Sexual Conduct policy when they first register, and then any time there is a policy revision. For those without computer access, paper forms are available for the user to fill out and they can be sent to the office by mail, fax or secure (encrypted) email.

**Protecting God's Children Training:** All new VIRTUS users, or those returning to service after being inactive, are required to complete the newest version of the *Protecting God's Children* training program. The most convenient and accessible option is the online version of the training, which contains 13 lessons and takes approximately two hours to finish. For those without computer access or who prefer an in-person training, the Diocese also offers live training provided by a facilitator; if there is no upcoming live training scheduled in your area, please contact the Diocesan VIRTUS coordinator.

- **Ongoing (Monthly) Training:** Once the initial training module is completed, each employee and volunteer is required to read the training bulletin that is published by VIRTUS within the first week of each month. Users should receive a reminder email, but they can also log into their VIRTUS account at any time to read the bulletin and answer the question at the bottom. It is extremely important to hit the submit button, otherwise the progress made will be lost and the bulletin will continue to show as Not Read.
  - VIRTUS users who ***fall behind six monthly bulletins will be considered inactive*** and their accounts will be made inactive due to noncompliance; those who need to restore compliance will be required to complete the full training module again.
  - For those without computer access, bulletins can be printed by the parish/school office and completed via paper, then they can be mailed, emailed or faxed to the office so that the VIRTUS profile can be updated.

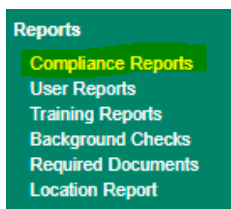
## Steps for Running Compliance Reports in VIRTUS

Each Local Administrator is given special rights in VIRTUS so that they can run compliance reports for their assigned location(s) by following the steps below. This report should be run at least every 15 days. If you have employees or volunteers who are no longer active at your parish, you must report these changes via phone or email to the Diocesan VIRTUS Coordinator, who can make these user status changes and keep your location(s) list as clean and updated as possible.

1. Log into your VIRTUS account and click on the **Administration tab** (yours will look a bit different, but if you do not see the Administration tab, please contact the Diocesan VIRTUS coordinator)



2. In the left-hand navigation menu, find Reports and then click on **Compliance Reports**



3. Click on **Compliance Report**

### Compliance Reports

#### Reports

- Master Report
- **Compliance Report**
- Compliance Audit - Chart C/D Combo
- Compliance Audit Required Documents
- Children's Program Training Reports

4. Select your desired **Location(s)** and then leave the default as **All Roles** and **All Profiles**. Also leave Active set to Yes (unless you want to see all Inactive users for your location as well), and then leave all of the Items boxes checked with the blue check. The *recommended* option is to **Export** and then download your report to Excel; however, for a quick check you may also choose to **Run Report** to your screen.

### Compliance Report

Use this page to see user compliance status

First Name:	<input type="text"/>	Last Name:	<input type="text"/>	Compliant:	<input type="text" value="- Any -"/>	Active:	<input type="text" value="Yes"/>	
Location:	<input type="text" value="Our Lady of the Valley Parish"/>	Role:	<input type="text" value="- All -"/>	Profile:	<input type="text" value="- All -"/>	<div>Items</div> <div><input checked="" type="checkbox"/> BGC <input checked="" type="checkbox"/> Bulletins</div> <div><input checked="" type="checkbox"/> Documents <input checked="" type="checkbox"/> Training</div>		
<input type="button" value="Run Report"/>		<input type="button" value="Reset"/>		<input type="button" value="Cancel"/>		<input type="button" value="Export"/>		<input type="button" value="Update"/>

***Pro Tip:*** If you download the report to Excel, immediately do a **Save As** and change your file type from .csv to .xlsx -- if you leave it as a .csv file, then any formatting you do to your spreadsheet will be lost the next time you open it. Please also make sure to save the report to a secure location since it does contain sensitive information.

5. Your compliance report **Export in Excel** will list all VIRTUS users associated with your location, the email address affiliated with their VIRTUS account, their role at your location, and their compliance status – users who are out of compliance will have an “N” listed in their **Compliance** column with the reason(s) for being non-compliant listed in the **Issues** column.

The compliance rules for the Diocese of Helena are set up in VIRTUS as follows:

- **Sexual Conduct Policy 2022** has been reviewed and acknowledged (“Document” listed in Issues column if non-compliant in this area)
- **Background Check** has been completed within the last 5 years (“BGC” listed in Issues column if non-compliant)
- **Bulletins** are up-to-date, meaning the user has fewer than 6 months missed (“Bulletins” listed in issues column if non-compliant)
  - *Note:* In rare cases where a user is not required to complete monthly bulletins, their Training must have been completed within the last 5 years (“Training” listed in Issues column if non-compliant)

If you choose to **Run Report** to your screen, users who are compliant will be identified with a green plus sign, and those out of compliance with a red minus sign, and their compliance issue noted in the Needs Attention box:

◆ Active	◆ Compliance	Details
Y	+	
Y	-	Needs Attention • Bulletins

6. Review your list and complete the following actions:
  - **First off, is someone missing who should be on your list?** If an employee/volunteer is active at your location but not on your VIRTUS list, please contact the Diocesan VIRTUS Coordinator right away to identify the issue.
  - For users who are or want to be active volunteers or employees at your location, **follow up with those who are non-compliant** by letting them know what they need to do and providing them with a clear deadline.
    - If volunteers do not meet your deadline and remain non-compliant, send an email to the Diocesan VIRTUS Coordinator ([cfcladmin@diocesehelena.org](mailto:cfcladmin@diocesehelena.org)) with a request to make the user account inactive, and take the volunteer off your list.

- All employees *must* remain compliant with VIRTUS and any issues need to be communicated to the Human Resources and Safe Environment director. ***Non-compliance with Safe Environment and VIRTUS requirements is grounds for termination.***
  - For users who are not active volunteers or employees at your location, email the Diocesan VIRTUS coordinator ([cfcladmin@diocesehelena.org](mailto:cfcladmin@diocesehelena.org)) with a request to make the user account inactive or remove your location from their VIRTUS profile.
7. The VIRTUS coordinator for the Diocese of Helena will also conduct larger-scale compliance checks on an annual or semi-annual basis to inactivate users who are not in compliance.

### **Ensuring that Youth Trainings are Conducted Annually and Reports are Submitted into VIRTUS**

Each year the Diocese of Helena **requires every parish/school to facilitate a VIRTUS *Teaching Safety—Empowering God’s Children Lesson*** to all of their registered young people. This requirement is part of our Safe Environment policy and is something that each location will attest to completing when filling out the Annual Attestation of Policy Implementation Form each June.

- **Empowering God’s Children Resources**: This link will take you to the Diocese of Helena web page section that provides you with the resources that you need: <https://diocesehelena.org/home-2/offices-and-ministries/safe-environment/protecting-gods-children-resources/>

### **Serving as a Contact for the Safe Environment/VIRTUS Staff at the Diocesan level**

When there is a safe environment update or issue, Diocesan staff will communicate with the appropriate parish/school/ministry leadership and the VIRTUS Local Administrator.

- VIRTUS compliance or user issues/questions will most often be communicated to local admins by the Diocesan VIRTUS Coordinator, **Mathias Gisondi Cormack**, (406) 442-5820 or [cfcladmin@dohmt.org](mailto:cfcladmin@dohmt.org).
- Safe Environment policy issues/questions will most often be communicated to local admins by the HR & Safe Environment Director, **Cassie Hall**, (406) 389-7070 or [chall@dohmt.org](mailto:chall@dohmt.org).

### **THANK YOU!**

On behalf of Bishop Vetter and all Parish, School, and Ministry leaders throughout the Diocese of Helena, we express our gratitude for your commitment to building and maintaining safe environments for our youth and vulnerable adults. The job of a Local Administrator is often thankless – but we see and appreciate all of the efforts you put into this important role. Providing resources, upholding standards, and communicating with your local community is essential to ensuring the safety of those entrusted to our care. Thank you for support and faithfulness to the work of God!