LSECs and the VIRTUS Database:

Does your VIRTUS account have an Administration tab? As a LSEC or a parish/Catholic administrator with these rights, you should see this tab at the top of your VIRTUS page after logging in to your account.

Click on this tab to go to the administration page. You will now see various tabs on the left sidebar.

Important tabs for you:

Under System Administration:

1. New User Signups: Here you will find people that recently registered in VIRTUS with your assigned location as their primary location. Be careful not to review the account on the same day the person registers as the person may still be in the process of registering. Review this user to see if you know the individual (registered for correct primary location) and if the person has completed the required documents and if the background check is pending or complete. If this is a minor, please contact Sherry Kalow immediately and make her aware of the individual’s birthdate. Sherry Kalow ([skalow@dnu.org](mailto:skalow@dnu.org)) is the VIRTUS database support person with the diocese and she is your main contact regarding any changes or questions with the database or background checks. If the background check on the new user account is a “No” or “Incomplete” contact Sherry to force a background check on the account. You and Sherry should work together to assure the new user is contacted as to the requirement. Assist this person to see that they register for an upcoming live session as a reasonable location becomes available for them or if they are approaching the 60-day grace period for attending a live training. Once the essential three are met on the account (a. Acceptance of Policy/Code of Conduct document; b. Clearance of appropriate background check(s); and c. Attendance at a live training), the account moves from this area to the Users area (see #3).
2. Preregistered Users: You need to follow the same protocols as your review of a new user. Since they have registered for a session, you do not need to follow-up with them in this regard. If they are attending a session outside of the diocese, be sure Sherry has this information so she can have VIRTUS transfer the training record to the Diocese of New Ulm account.
3. Users: A list of all the users for the locations you have permission to see. An inactive box can be checked/unchecked if you need to see or do not want to see the inactive accounts. Accounts currently remain in the system indefinitely so as if there is a need to go back to review the account information at a later date.
4. User Search: This is a way to search for an account. You may put in any part of the person’s name (first or last), user id, or email address to find the information you are looking for. It is often better not to put in too much information as the portion you enter in the search needs to be exactly as is entered in the account.

Under Reports:

1. New Master Report (Updated 2021): Use this report tab to run a report to find out necessary information about the accounts for your location(s). The boxes you check to run the master report will depend upon what you need to know. You may check as few boxes as needed to get the necessary information. I typically always choose primary location and email address. You are not typically responsible for the compliance of accounts that are not at your primary location; however, the account holder cannot be active at your location (as a secondary location) if the account is not fully compliant.

For example, if you want to know what volunteers have not completed the annual training, select these boxes:

Location: Select 1 or more of the locations available to you  
Profile: Volunteers  
User Fields to Display: Primary location and email address  
Compliance Fields to Display: Annual Volunteer Safe Environment Online Training—Year

Go to the bottom of the page and run your report to the screen or if you want to use it for a longer period run it to an Excel file.

You may run a similar report to find out what employees have not completed the last quarterly training assigned. If you have a Catholic school assigned to you, you will need to run employees and educators as separate reports.

You may run a similar report to find those who have credit checks and thereby have permission to be money counters or work with budgets and financials. You will need to check the boxes for all the Credit check options as we have used several background check companies through the years. This policy is not a part of Safe Environment policies but is an Administration policy of the diocese.

You may run a similar report to find those who have motor vehicle checks and thereby have met the background check requirement for being able to drive for church/Catholic school business or fieldtrips. Again, you will need to check the boxes for all the motor vehicle options as we have used numerous background check companies over the years. Note, if they are driving minors or vulnerable adults they need to meet all safe environment protocols. In addition, there are Catholic Mutual forms to complete and a Catholic Mutual vehicle safety video to view. This information falls under an Administration policy of the diocese regarding transportation.

For an approved account, the main item that needs reviewed by the LSEC is the ongoing training. If you request an inactive account be reactivated or if you request accounts to have a change in the user profile, these accounts will have an \* in front of the last name and you (and possibly the user) will be notified as to what is needed on the account. Sherry will lead you through this process and let you and the user know what needs to be completed. It is expected the accounts with an \* in front of the last name are cleared up within five business days. When reactivating an account, always verify the email address is accurate.

In addition, be sure to request accounts be appropriately inactivated in a timely manner for employees that left employment or volunteers that moved away from the area. It is best to review the location listing prior to the posting of trainings on accounts (at least quarterly for employees and at least each July for volunteers).

Updated 8/2021  
Website Files - SE