



Archdiocese of Seattle Safe Environment Program

Guide to Creating a Background Check Report by Location

This report should be created every couple of months.

The Background Check Report is a tool to assist you with monitoring for any background checks that get stuck as “error”, “incomplete” or “pending”.

1. On your Administration Tab click the word “Administration” to bring up your administration dashboard. Click the “Background Checks” link in the Quick Links. *(See the red box in the figure below.)*

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- ~~Activity Report by User~~
- **Background Check Report**
- Calendar of Scheduled Training
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- Live Training Report
- Training Bulletin Report

User Search

Enter a piece of information about the user:

2. This will open a new page to choose your report filters.

Background Check Report Filter

You may filter the background check report by any of the criteria below, but none are required. Please note that if the date filters are used, the report will include all background check records created between the start and end dates. All checked statuses will be reported. If no status is checked, all statuses will be included in the report.

User Location:
-- Select a user location --

Background Check Start Date:
[Empty date field]

Background Check End Date:
[Empty date field]

Background Check Status:

- Error
- Incomplete
- Initiated
- Pending
- Complete

3. Set your filters: (See example in the figure below.)

- Choose your location in the Location filter. If you are responsible for more than one location, plan to create a separate report for each location.
- Enter a start date of three years ago from the date you are creating your original report. That gives you the 3 year renewal period and will capture anything that is not complete within that period.
- For subsequent monitoring you can put in a shorter time period if you wish, e.g. the past 1-2 months.
- Enter your end date as the date you are creating the report.
- Click error, incomplete and pending.
- Click “Get Report”.

Background Check Report Filter

You may filter the background check report by any of the criteria below, but none are required. Please note that if the date filters are used, the report will include all background check records created between the start and end dates. All checked statuses will be reported. If no status is checked, all statuses will be included in the report.

User Location:
Chancery (Seattle)

Background Check Start Date:
02/07/2020

Background Check End Date:
02/07/2023

Background Check Status:

- Error
- Incomplete
- Initiated
- Pending
- Complete

4. You will get an on-screen report. There is no option to print it, but feel free to print screen if it helps you to have the list on paper.
5. The report will list all errors, incompletes or pendings within the timeframe you selected. Please resolve all incomplete background checks in a timely manner, hence creating this report on a regular basis so you discover any errors.
 - Click on an individual user’s name to open their profile directly from this report.
 - **IMPORTANT:** background checks found on this Virtus list may or may not actually be incomplete in Trak-1. You must **ALWAYS** check Trak-1 for a result.
 - Sometimes the error is legitimate: if there is no report in Trak-1 and you have done a thorough search using the “Archived Reports” link, then the application was never completed.
 - Sometimes the error noted in Virtus is actually an issue of a result not being uploaded back to Virtus from Trak-1. The submission went through initially, Trak-1 ran and obtained a result, but the result never got back into Virtus.
 - Sometimes the error is simply an additional attempt by a user to submit a background check that was already completed within the past 3 years. If you see the previous and current background check in addition to an error, we want to remove the error.

Filtered Background Check Report




Filter criteria:

Location: Chancery
 Dates: 02/07/20 through 02/07/23
 Statuses: Incomplete, Pending

User	User Status	CICS: Employee	CICS: Volunteer	Trak1: Credit Report Only	Trak1: Education Verification Only	Trak1: Employee Package	Trak1: Employee Package + Credit	Trak1: Employee Package + Education Verification	Trak1: Employee Package + Education Verification + Credit	Trak1: Integration Test Package	Trak1: Volunteer Package
	Pending					Error on 12/01/2022					
	Active					Error on 10/19/2021					
	Active					Error on 05/19/2022					
	Active					Error on 05/02/2022					
	Active					Error on 02/15/2022					
	Active					Error on 05/16/2022					
	Active					Error on 10/07/2021					
	Active					Incomplete on 05/04/2021					
	Active					Error on 01/14/2022					
	Active										Error on 01/04/2023
	Active					Error on 05/23/2022					
	Active					Pending on 02/06/2023					

- An Excel spreadsheet will be created and it may initially look something like this. *Don't be alarmed! You simply have to open up (widen) the columns to see all the data!*
7. Once you have researched the error(s) for an individual or group of individuals, follow up is in order.
- If you actually find the results in Trak-1 the issue was due to an uploading problem. Please manually enter the result into the user's profile.
 - Click the "edit button" on the right side of the BGC entry. *(circled in red below)*

Background Screening

Date	Type & Provider	Name Submitted	Run By	Report Location	Comments	Complete	Edit
05/16/2022	Employee Package Trak1					Error:	
05/17/2019	Employee Package Trak1				all clear	Yes	
04/22/2016	Employee Package Trak1				all clear	Yes	

Update Background Check

Type:

Date:

Name Submitted:

Run By:

Results Location:

Comments:



Complete: YES
 NO
 PENDING

- Correct the date as needed: it should match the date of submission on the Trak-1 report (not the date of completion).
- "Run By" should be the user's name.
- "Comments" is where you will type the result 'All clear'.
- "Complete" you will change to YES.
- Click the 'Save' button and that will do it.

- Pay close attention to the dates in the user's Background Check tab.
 - Always double-check to see if a background check was submitted (*before or after the ERROR entry*).
 - If indeed there is already a resulted background check for the same date, or a date in the same month or year, the error simply needs to be deleted.
 - Email sep@seattlearch.org with the user name and userID requesting the BGC error be deleted.

General | Contact Info | Private | **Background Check** | Required Documents | Training | Summary

Background Screening

Date	Type & Provider	Name Submitted	Run By	Report Location	Comments	Complete	Edit
01/14/2022	Employee Package Trak1					Error:	
01/14/2022	Employee Package Trak1		Manual Submission	Arch-Chancery	All Clear	Yes	

[Record a background check for this user](#)

Again, background check reports should be run on a regular basis to determine any incomplete background check in the system. All background checks must be resulted in Virtus within a timely manner. This report help will ensure that you are catching those that become errors in Virtus.