Archdiocese of Seattle
Safe Environment Program
Guide to Creating a Master Report by Location
This report should be created monthly at minimum.

The Master Report is a tool to assist you with monitoring Safe Environment Program compliance for all active employees and volunteers at your location. It is an "at-a-glance" report that helps you review each individual and the status of their SEP requirements without having to go back and forth between individual profiles.

1. On your Administration Tab click "Master Report". *(See the red box in the figure below.)*

2. This will open a new page to set the parameters of your report. Saved Reports "Master Report Location 3" is a pre-loaded report that will have all the filters listed below. All you will need to change is your location.

3. Review 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.
    - Choose Educator, Employee (Diocesan/Eparchial), Employee (Parish/Parochial), Faith Formation/Youth Ministry Volunteer, Parent Volunteer and Volunteer. Hold down the "ctrl" key at the lower left of your keyboard to highlight multiple entries.
    Locations are not responsible for priests, deacons, seminarians or candidates for ordination. You may add CYO coach if that is applicable to your location.
    - Profile: choose "User".
    - Continuing Training: choose "Not Required" and "Required: Per policy".

Master Report

Saved Reports | Master Report Location 3 ⌄ | manage

Filters

Location:
-- All Locations --
All Saints Catholic Church (Puyallup)
All Saints School - Puyallup (Puyallup)
Archbishop Brunett Retreat Faith Formation Center at the Palisades (Federal Way)
Archdiocese Seattle Seminarian (Seattle)
Archdiocese of Seattle - Pastoral Care (Seattle)
Associated Catholic Cemeteries (SEATTLE)

Role:
* Employee (Parish/Parochial)
Facilitator
Faith Formation/Youth Ministry Volunteer
Parent Volunteer
* Priest
Seminarian
* Volunteer

Profile:
-- All Profiles --
Administrator
Default
Due for the PLACT Sports as Ministry Training
Reviewer
User

Continuing Training:
Required: Bulletins
Required: Printed
Childrens Program Only
Completed: Access
Completed: No Access
Suspended
Required: Per policy

-- All Training Statuses --
Not Required
Required: Bulletins
Required: Printed
Childrens Program Only
Completed: Access
Completed: No Access

If you have ushers or money counters who are not required to do training or sign policies, then be sure to also add the "Not Required" option.

4. Select the User Fields. The fields checked below are sufficient, but feel free to add more if you wish. However, if you have too many fields it will bog down your report.
   - "All locations" pulls in your location even if it is not primary.
   - "All roles" allows you to see what roles are listed in each profile.

User Fields

- ☑ Last
- ☑ First
- ☐ Middle
- ☐ Nickname
- ☐ Salutation
- ☐ Login ID
- ☑ Email
- ☐ Account Status
- ☐ Primary Location
- ☐ Primary Location ID
- ☑ All Locations (select to find users in secondary sites)
- ☐ Roles in primary location only (select to limit roles to only those in the user's primary location)
- ☐ Roles Linked to Location
- ☑ All Roles
- ☐ Profile
- ☐ Language
- ☑ Position/Title
- ☐ Facilitator Tab
- ☐ Educator Tab
- ☐ Continuing Training Status
- ☐ Contact with minors
- ☐ Contact with vulnerable adults
- ☐ Address
- ☐ Address 2
- ☐ City
- ☐ State
- ☐ ZIP
- ☑ Daytime Phone
- ☐ Evening Phone
- ☐ Group
- ☐ Approval Date
- ☐ Registration Date
- ☐ Last Login
- ☐ Inactive Date
- ☐ User Notes
- ☐ Database ID*
- ☐ External ID
- ☐ External ID 2
- ☐ External ID 3
- ☐ Date of Birth
- ☐ Last 4 of SSN
- ☐ Caution Flag

  * include this field if you will be sending the report to VIRTUS Support

5. Select the Background Checks Fields. Check all the boxes as indicated below.
   - The first box (with blue lettering) will ensure that you only have one column indicating the most recent background check date.
   - We pull both employee and volunteer results from our old vendor, CICS, and our new vendor Trak-1.

Background Checks

☑ Combine all selected background check types into one column - You must select the items below to combine

☑ 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: International Criminal Only
☑ Trak1: Standard Package
☑ Trak1: Volunteer Package

Standard Package was added in February 2024. But some of the old packages still exist. Be sure to have ALL of these filters checked.

6. Select the Required Documents Fields. Check all the boxes as indicated below.
   - The first box (with blue lettering) will ensure that you only have one column indicating the most recent date that a user signed off on the SEP personnel policies.
   - We currently only have one set of policies in use.

Required Documents

☑ Combine all selected document types into one column - You must select the items below to combine

☐ Backgroundcheck Questions
☑ Safe Environment Church Personnel Policies
☐ Coach Verification (inactive)
☐ Code of Conduct (inactive)
☐ Code of Professional Conduct for Church Personnel (inactive)
☐ Code of Professional Conduct for Church Personnel (inactive)
☐ Reporting Suspected Abuse or Neglect of Minors and Vulnerable Adults (inactive)
☐ Safe Environment Program Church Personnel Agreement (inactive)
☐ Sexual Abuse Sexual Misconduct Sexual Harassment Policy (inactive)

7. Select the the Training Fields. Check all the boxes as indicated below.
   - The first box (with blue lettering) will ensure that you only have one column indicating the most recent training date.
   - We currently only have one Live class *(PGC for Adults)*.

Training

☑ **Combine all selected training types into one column - You must select the items below to combine**

Live
☑ Protecting God's Children for Adults
☐ Protecting God's Children for Facilitators
☐ Protecting God's Children for Parents

Online
☑ Annual Volunteer Safe Environment Online Training—2019
☐ Bullying/Cyberbullying
☐ Child Sexual Abuse Awareness Module 1.0
☐ Healthy Choices for Teens 1.0_Expanded with Safe Environment Information
☐ Healthy Relationships for Teens 2.0 Online Module_Expansion with Safe Environment Component
☑ Keeping the Promise Alive
☑ Keeping the Promise Alive 3.0_
☑ Keeping the Promise Alive 3.0_ (Spanish)
☑ Manteniendo Viva la Promesa
☐ Protecting All Children™ Online Awareness Session
☐ Protecting God's Children Online Awareness Session 3.0 (Spanish)
☑ Protecting God's Children Online Awareness Session 4.0 (Closed Captioning)
☑ Protecting God's Children Online Awareness Session 4.0 (Español)
☑ Protecting God's Children Online Awareness Session 4.0 (Korean Subtitles)
☑ Protecting God's Children Online Awareness Session 4.0 (Polish Subtitles)
☑ Protecting God's Children Online Awareness Session 4.0 (Vietnamese Subtitles)
☑ Protecting God's Children Online Awareness Session 4.0 - Seattle
☑ Protecting God's Children Online Awareness Session 4.0 - Spanish - Seattle
☐ Protecting God's Children® Online Awareness Session 2.0
☑ Protecting God's Children® Online Awareness Session 4.0 (Español)_Seattle
☐ Protecting God's Children® Online Awareness Session 4.0_
☑ Protecting God's Children® Online Awareness Session 4.0_Seattle
☐ Protecting God's Children Online Awareness Session 3.0
☐ Safe Environment Awareness Program for International Priests
☐ Sexual Harassment - Módulo de Capacitación en Línea Sobre Acoso Sexual 1.0 (Español)
☐ Sexual Harassment Prevention Online Training Module 1.0
☑ Technology and Virtual Boundaries Awareness: Online Communication With Youth
☑ Technology and Virtual Boundaries Awareness: Online Communication With Youth (Spanish)
☑ Vulnerable Adults Training Module
☑ Vulnerable Adults Training Module (Spanish)
☐ Vulnerable Adults Training Module 2.0

8. Select the final Parameters. Check the circle only, as indicated below.
    -   We do not require users to read any bulletins, so leave the Bulletins box unchecked.
    -   We want the report to only include currently active users, even those waiting to sign up for a class or have a pending status in their profile. *Avoid other options or you will not pull in the appropriate data!!*

Bulletins

☐ Protecting God's Children for Adults

○ Show only users who are currently active
◉ Show only users who are currently active (including pending users)
○ Show only users who are currently pending
○ Show users who were active from: 07/01/2021 [] to: 06/30/2022 [] (e.g. audit period)
○ Show facilitators only
○ Show local administrators only
○ Show only users who are inactive
○ Show all users (including inactive users)*

[Run Report to Screen]   [Export Report to CSV]

9. Click "Export Report to CSV".

10. On the next page, click the "Download the report" link.

Master Report

➡ Download the report

Return to the report menu

11. Excel Spreadsheet
   - 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!*

Last	First	Email	Position/Ti	Daytime Ph	Training	Background	Document
	PIERRE		Catechist	2.53E+09	8/30/2022	9/19/2021	9/27/2018
			Youth minis	2.54E+09	7/27/2022	7/4/2022	7/4/2022
			Faith Formation Teach	########	########	########
			CCD teacher		8/21/2018	8/14/2018	########
		@gmail.com		########	10/4/2022	########
			Food Bank Volunteer,	########	########	########
			Volunteer	2.54E+09	########	8/5/2019	8/5/2019
			Food Bank	2.53E+09	10/8/2020	10/7/2020	########
			Grounds M	253-344-78	10/7/2021	6/9/2021	6/9/2021
			Community	2.54E+09	2/11/2022	3/11/2022	2/27/2018

12. Adjust the columns to show all the information clearly.
   - *Sensitive information has been blocked out.*
   - The Position/Title helps determine if someone is subject to all three requirements or not.
   - Documents – one time requirement only for those having contact with minors/vulnerable adults. A blank means the policies have never been signed.
   - Background check and Training – must be current within the past 3 years from date of the Master Report.
   - Highlight in yellow all non-compliant dates.

Last	First	Email	Position/Title	Daytime Phone	Training	Background Check	Document
██	██	██	Catechist	██	8/30/2022	9/19/2021	9/27/2018
██	██	██	Youth ministry	██	7/27/2022	7/4/2022	7/4/2022
██	██	██	Faith Formation Teacher		12/26/2017	10/13/2022	10/22/2016
██	██	██	CCD teacher		8/21/2018	8/14/2018	12/14/2017
██	██	██	Custodial, CYO		*Blank on CSV*	12/6/2017	3/7/2015
██	██	██	Marriage Mentor		5/10/2022	5/2/2022	5/1/2017
██	██	██	leader	██	*Blank on CSV*	*Blank on CSV*	10/26/2016
██	██	██	Vacation Bible School	██	6/16/2016	6/15/2016	6/15/2016
██	██	██			*Blank on CSV*	9/29/2009	*Blank on CSV*
██	██	██	volunteer jail chaplain		*Blank on CSV*	5/18/2011	*Blank on CSV*

- After highlighting all non-compliant dates, set to work on those users who are out of compliance.
- Determine if the user is still active or not. Often times they are no longer serving or employed at the location but their Virtus profile never got inactivated. You may want to call them to verify status.
- *Any profile <u>listed as "active" in Virtus</u> will show up in your Master report as an active user regardless of whether they truly are currently active or not!*
- The Position/Title helps determine if someone is subject to all three SEP requirements or not. If their role does not include contact with minors or vulnerable adults, they may not need to meet all requirements. Some parishes have stricter policy regarding the SEP requirements for volunteers.
- For those who are inactive, inactivate their profile in Virus and cross their name off your Master Report. There is no further follow up needed.
- For those who are active:
    - Contact them by phone or email and let them know they are out of compliance for _____ SEP requirement(s).
    - Give them a couple of weeks to come into compliance.
    - After two weeks, follow up with them again. If they have come into compliance, great, they are good to go. If they have not come into compliance then send an email (so you have written documentation) and give them a few more days.
    - After a few more days, if they still have not come into compliance then speak with your administrator/pastor. Volunteers who have been given sufficient time/notification to become compliant and have not done so are subject to a suspension of their volunteer ministry until such time that they become compliant.
    - Update your Master Report with new dates as users come into compliance.
    - Save your Master Report with any notations as documentation of your follow up with compliance process.

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