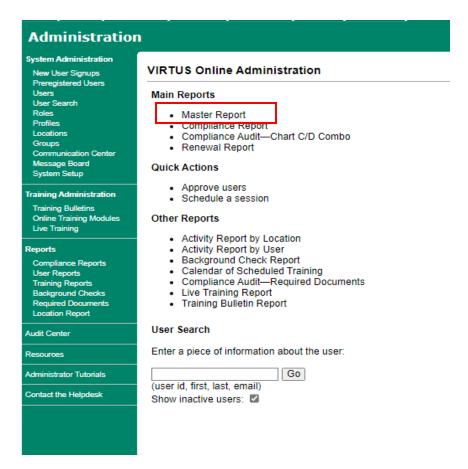


## Archdiocese of Seattle Safe Environment Program Guide to Creating a Master Report by Location This report should be created monthly at minimum.

## Revised 09.26.2024

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".

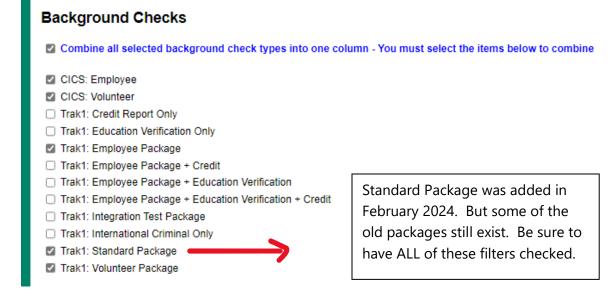
## Master Report

Saved Reports Master Report Location 3						
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)					
* Employee (Parish/Parochial) Facilitator Faith Formation/Youth Ministry Volunteer Role: Parent Volunteer * Priest Seminarian * Volunteer						
Profile:	All Profiles Administrator Default Due for the PLACT Sports as Ministry Training Reviewer User					
Continuing Training:	Required: Bulletins       All Training Statuses Al					

- 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
Language
Position/Title
Facilitator Tab
Educator Tab
Continuing Training Status
Contact with minors
Contact with vulnerable adults
Address 2
State     ZIP
Daytime Phone Evening Phone
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.



- 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)
- C 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
- Boundaries Awareness: Continuing Aspects of Human Formation for Clergy and Religious
- Bullying/Cyberbullying
- Child Sexual Abuse Awareness Module 1.0
- Healthy Boundaries for Adults: Boundary Development and Implementation 1.0
- Healthy Boundaries for Adults: Boundary Development and Implementation 1.0 (Spanish)
- Healthy Boundaries for Adults: Boundary Development and Implementation 1.0 Seattle
- Healthy Boundaries for Adults: Boundary Development and Implementation 1.0 Seattle (Spanish)
- 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<sup>™</sup> Online Awareness Session
- Protecting God's Children Online Awareness Session 3.0 (Spanish)
- Protecting God's Children Online Awareness Session 4.0
- 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				
<ul> <li>Show only users who are currently active</li> <li>Show only users who are currently active (including pending users)</li> <li>Show only users who are currently pending</li> <li>Show users who were active from: 07/01/2021 IF to: 06/30/2022 IF (e.g. audit period)</li> <li>Show facilitators only</li> <li>Show facilitators only</li> </ul>				
<ul> <li>Show local administrators only</li> <li>Show only users who are inactive</li> </ul>				
<ul> <li>○ Show all users (including inactive users)<sup>*</sup></li> </ul>				
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/Tit	Daytime Ph	Training	Background	Document
	015005	Coheda	Catechist	2.53E+09	8/30/2022	9/19/2021	9/27/2018
			Youth mini:	2.54E+09	7/27/2022	7/4/2022	7/4/2022
			Faith Forma	tion Teach	#########	#########	#########
			CCD teacher		8/21/2018	8/14/2018	########
			@gmail.com		########	10/4/2022	########
			Food Bank V	olunteer,	########	#########	########
			Volunteer	2.54E+09	########	8/5/2019	8/5/2019
			Food Bank	2.53E+09	10/8/2020	10/7/2020	#########
			Grounds M2	253-344-78	10/7/2021	6/9/2021	6/9/2021
<b>,</b>			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	<b>Position/Title</b> Catechist Youth ministry Faith Formation Teacher CCD teacher	Daytime Phone	Training 8/30/2022 7/27/2022 12/26/2017 8/21/2018	Background Check 9/19/2021 7/4/2022 10/13/2022 8/14/2018	Document 9/27/2018 7/4/2022 10/22/2016 12/14/2017
	Ξ	E	Custodial, CYO Marriage Mentor leader		Blank on CSV 5/10/2022 Blank on CSV	<mark>12/6/2017</mark> 5/2/2022 <u>Blank on CSV</u>	3/7/2015 5/1/2017 10/26/2016
			Vacation Bible School volunteer jail chaplain		6/16/2016 Blank on CSV Blank on CSV	6/15/2016 9/29/2009 5/18/2011	6/15/2016 Blank on CSV 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.