



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.)*

Administration

- System Administration
 - New User Signups
 - Preregistered Users
 - Users
 - User Search
 - Roles
 - Profiles
 - Locations
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 - System Setup
- Training Administration
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 - Live Training
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 - User Reports
 - Training Reports
 - Background Checks
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- Audit Center
- Resources
- Administrator Tutorials
- Contact the Helpdesk

VIRTUS Online Administration

Main Reports

- Master Report
- Compliance Report
- Compliance Audit—Chart C/D Combo
- Renewal Report

Quick Actions

- Approve users
- Schedule a session

Other Reports

- Activity Report by Location
- Activity Report by User
- Background Check Report
- Calendar of Scheduled Training
- Compliance Audit—Required Documents
- Live Training Report
- Training Bulletin Report

User Search

Enter a piece of information about the user:

(user id, first, last, email)

Show inactive users: ☒

2. 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 Last Run [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 of Seattle - Pastoral Care (Seattle) Associated Catholic Cemeteries (SEATTLE) Assumption Catholic Church - Seattle (Seattle)	
Role:	-- All Roles -- * Candidate for ordination * Deacon * Educator * Employee (Diocesan/Eparchial) * Employee (Parish/Parochial) Facilitator	Facilitator * Faith Formation/Youth Ministry Volunteer * Parent Volunteer * Priest * Seminarian * Volunteer z-Missing Role
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

People make mistakes choosing roles when creating their profiles. We want to “capture” these mistakes and the way we do that is by highlighting the possible laity roles.

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.

3. 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

IMPORTANT WARNING: Do not be tempted to add or omit any of the filters listed on these instructions. Changed settings risk leaving people off the report who should be included; or including people on the report who do not belong there!

4. 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.

5. 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)

6. 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*).
7. 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!!*

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
- ☐ VIRTUS Train-the-Facilitator |(Enables Facilitators to train PGC Participants)

Online

- ☐ Boundaries Awareness: Continuing Aspects of Human Formation for Clergy and Religious
- ☐ Boundaries Awareness: Continuing Aspects of Human Formation for Clergy and Religious (Spanish)
- ☐ 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)
- ☒ Keeping the Promise Alive
- ☒ Keeping the Promise Alive 3.0_
- ☒ Keeping the Promise Alive 3.0_ (Spanish)
- ☒ Manteniendo Viva la Promesa
- ☐ 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 4.0 (Español)_Seattle
- ☒ Protecting God's Children® Online Awareness Session 4.0_ Seattle
- ☒ 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

Users to Show

- ☐ 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 any time from: to:
- ☐ Show facilitators only
- ☐ Show local administrators only
- ☐ Show only users who are inactive
- ☐ Show all users (including inactive users)*

Save Report (Optional)

Report Name

Give your report a new title to save your settings. Once you run it to CSV and download the report, the template will be saved for quick access each time you want to run a Master Report.

IMPORTANT WARNING: Do not be tempted to use “Run Report to Screen” for managing compliance. The database is in a constant state of flux and if you work online, get interrupted and have to close the report online, next time you open it data will be different. Create the spreadsheet and work from it over the next couple of weeks.

8. Click “Export Report to CSV”.

9. On the next page, click the “Download the report” link.

Master Report



[Download the report](#)

[Return to the report menu](#)

OF NOTE: next month when you are ready to create your next Master Report, simply click the “down arrow” at SAVED REPORTS and choose your saved report from the list.

Master Report

Saved Reports 

Filters

-- All Locations --
All Saints Catholic Church (Puyallup)
All Saints School - Puvallup (Puvallup)

10. 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/Title	Daytime Phone	Training	Background Check	Document
[REDACTED]	[REDACTED]	[REDACTED]	Catechist	2.53E+09	8/30/2022	9/19/2021	9/27/2018
[REDACTED]	[REDACTED]	[REDACTED]	Youth ministry	2.54E+09	7/27/2022	7/4/2022	7/4/2022
[REDACTED]	[REDACTED]	[REDACTED]	Faith Formation Teacher		#####	#####	#####
[REDACTED]	[REDACTED]	[REDACTED]	CCD teacher		8/21/2018	8/14/2018	#####
[REDACTED]	[REDACTED]	[REDACTED]	@gmail.com		#####	10/4/2022	#####
[REDACTED]	[REDACTED]	[REDACTED]	Food Bank Volunteer,		#####	#####	#####
[REDACTED]	[REDACTED]	[REDACTED]	Volunteer	2.54E+09	#####	8/5/2019	8/5/2019
[REDACTED]	[REDACTED]	[REDACTED]	Food Bank	2.53E+09	10/8/2020	10/7/2020	#####
[REDACTED]	[REDACTED]	[REDACTED]	Grounds Maintenance	253-344-78	10/7/2021	6/9/2021	6/9/2021
[REDACTED]	[REDACTED]	[REDACTED]	Community	2.54E+09	2/11/2022	3/11/2022	2/27/2018

11. 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
[REDACTED]	[REDACTED]	[REDACTED]	Catechist	[REDACTED]	8/30/2022	9/19/2021	9/27/2018
[REDACTED]	[REDACTED]	[REDACTED]	Youth ministry	[REDACTED]	7/27/2022	7/4/2022	7/4/2022
[REDACTED]	[REDACTED]	[REDACTED]	Faith Formation Teacher		12/26/2017	10/13/2022	10/22/2016
[REDACTED]	[REDACTED]	[REDACTED]	CCD teacher		8/21/2018	8/14/2018	12/14/2017
[REDACTED]	[REDACTED]	[REDACTED]	Custodial, CYO		Blank on CSV	12/6/2017	3/7/2015
[REDACTED]	[REDACTED]	[REDACTED]	Marriage Mentor		5/10/2022	5/2/2022	5/1/2017
[REDACTED]	[REDACTED]	[REDACTED]	leader	[REDACTED]	Blank on CSV	Blank on CSV	10/26/2016
[REDACTED]	[REDACTED]	[REDACTED]	Vacation Bible School	[REDACTED]	6/16/2016	6/15/2016	6/15/2016
[REDACTED]	[REDACTED]	[REDACTED]			Blank on CSV	9/29/2009	Blank on CSV
[REDACTED]	[REDACTED]	[REDACTED]	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 listed as “active” in Virtus 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 Virtus 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 the following SEP requirement(s): list what they are overdue on.
 - Give them a week to come into compliance.
 - After a week, 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 and employees who have been given sufficient time/notification to become compliant and have not done so are subject to a suspension of their volunteer ministry or employment until such time that they become compliant.
 - Save your Master Report with any notations as documentation of your follow-up with compliance process.
 - ***Individuals who are subject to SEP requirements should not be working with children or vulnerable adults if they have never had training or a background check; or if they are more than 2 weeks overdue for renewal of their requirements.***