A PROGRAM AND SERVICE OF
THE NATIONAL CATHOLIC RISK RETENTION GROUP, INC.
VIRTUS® Online

Compliance Officer Website Guide

VIRTUS® Excellence Builds Trust

Log in to your VIRTUS account at www.virtus.org to review the functionalities of the VIRTUS Platform.

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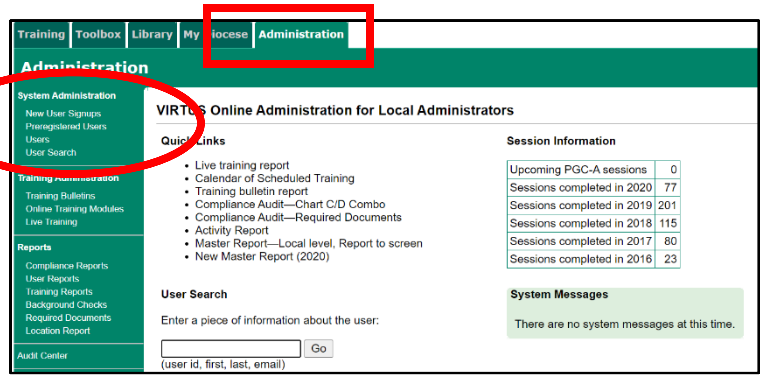
Frequently Asked Questions:

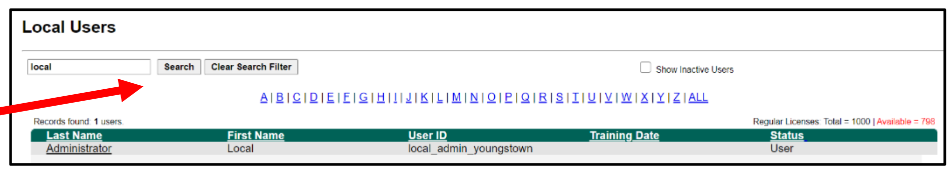
How to view my own location's employees and volunteers who have online registrations within VIRTUS Online, and make changes to their account and/or affiliate them with my location?

1. Select the "Administration" tab from the tabs at the top of the page.

   a. New User Signups – indicates that the training session has past, and the user is awaiting approval.
   b. Preregistered Users – indicates that the user registered an upcoming session (the coordinators will be notified via email of the registration)
   c. Users – indicates the list of users within the coordinators location(s)
   d. User Search – search for users within your designated location(s)



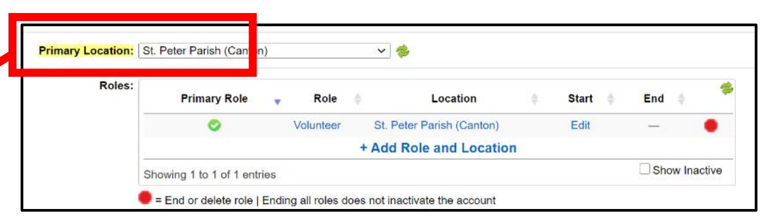
2. The employees and volunteers for your affiliated location(s) will be listed in alphabetical order by last name. You can also search in the Search box for individual users, and then select "Search". If a particular individual is missing from your list:



   a. First, double check other possibilities of name spellings, including hyphenated last names and nicknames.

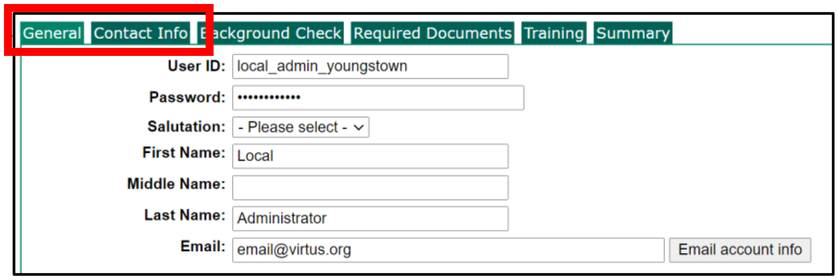
   b. Additionally, the person may not have registered online, or they may have registered themselves with a different location within your organization.

   c. Within the searched person's account page, the Compliance Officer will be able to make/save any changes if the person's Primary Location or Additional Location(s) match the Compliance Officer's location.

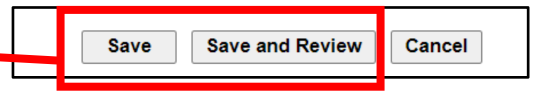


Please Note: If the person is not affiliated within "Local Users", the Compliance Officer should communicate with the Diocesan Coordinator to request that the individual's account be updated with the appropriate affiliated location.

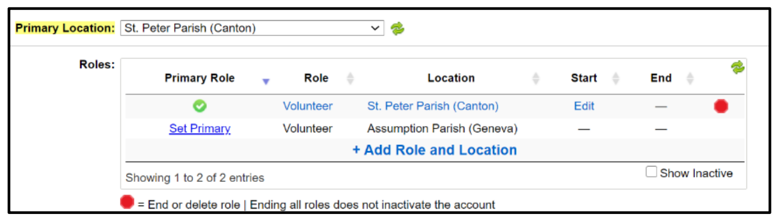
Within the **General Tab** and **Contact Info Tab**, the Compliance Officer will be able to update/save changes to a person's account, including the person's 'User ID', 'Name', 'Email Address', 'Mailing Address', 'Phone Number', and 'Location/Role' of an Active User by clicking on the person's name within 'Users'.



The ability exists to 'Save' or 'Save and Review' the updated information for Local Users.

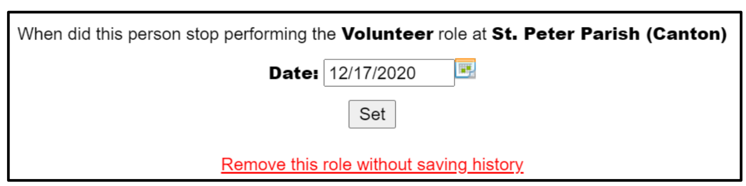


d. The **Primary Location** should be selected within the box. The green check signifies the **Primary Role**.

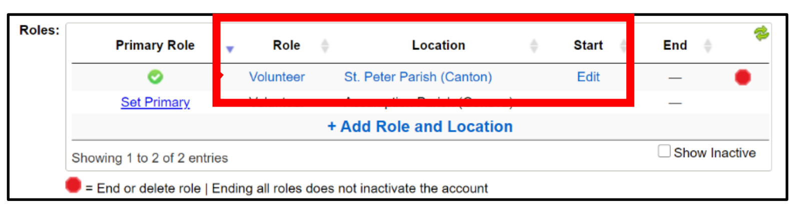


e. To add a Location and Role, click on **Add Role and Location** and select Role, Location and Start Date (if unknown, a date is not needed) and **Save.**

f. To inactivate a Role/Location, click on the red stop sign to inactivate the record by clicking on Set. A Role/Location can be deleted/removed if it is an incorrect selection. If no stop sign appears, it indicates that it is a location outside of your designated



g. To edit, **Click** on the designated Role, Location or Date.

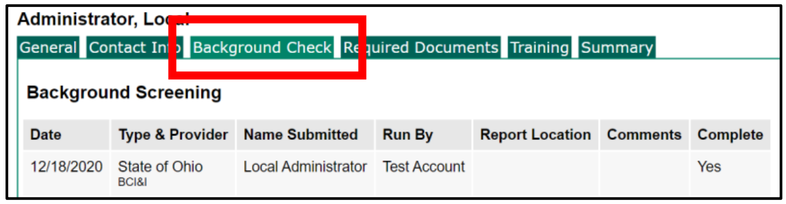


3. If a match is **not** found, it may be that the person did not create an online registration and still needs to create one or not within your designated location(s). Please communicate with the Diocesan Coordinator, as needed.

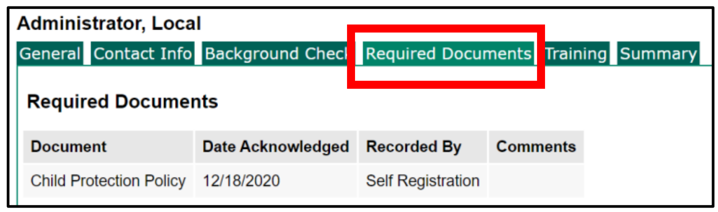
How to review an account to view a background check, required document, training, and print a certificate?

1. In order to review an account's main profile page, the Compliance Officer must first search for the user and click on the person's name to open up the profile. Once a user is selected, an "active/approved" user will have all of the following tabs associated within the account.

2. The Background Check information will appear with the **Background Check Tab.**

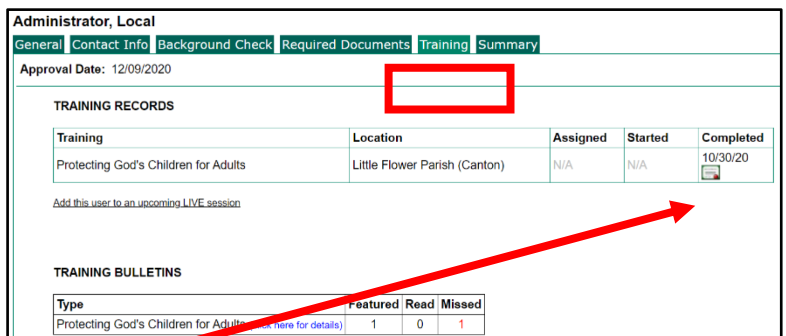


3. The Required Documents that are electronically acknowledged will appear within the **Required Documents Tab**, and the ability exists to Record a document for a user.

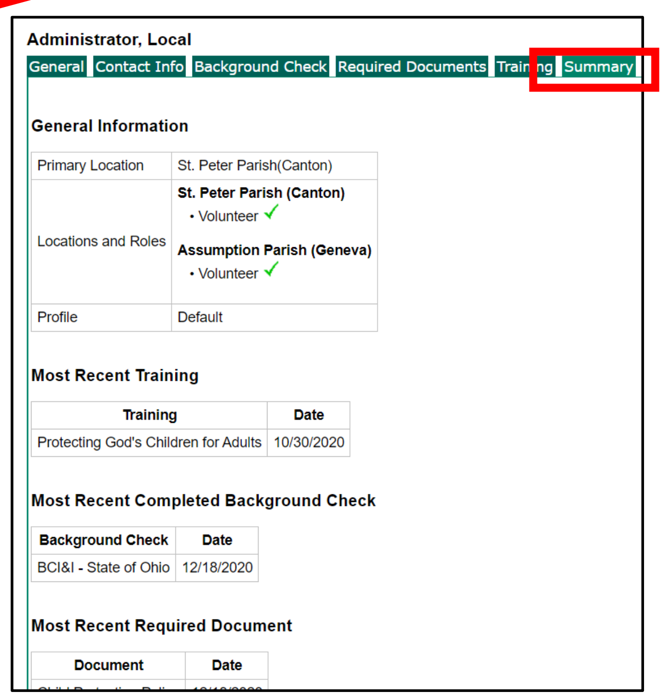


4. The training information will appear within the **Training Tab,** and the ability exists to print the training certificate by clicking on the certificate icon.

   a. If live training is accessible, the user can be added to an upcoming session.
   b. If **training bulletins** are accessible for a user, the bulletin count can be viewed.
   c. A **certificate** can be viewed and/or printed by clicking on the certificate icon.



5. To review a summary of the compliance items, please click on the **Summary Tab**. The ability to print this page exists by clikcing on the printer icon in the upper right corner of the screen.

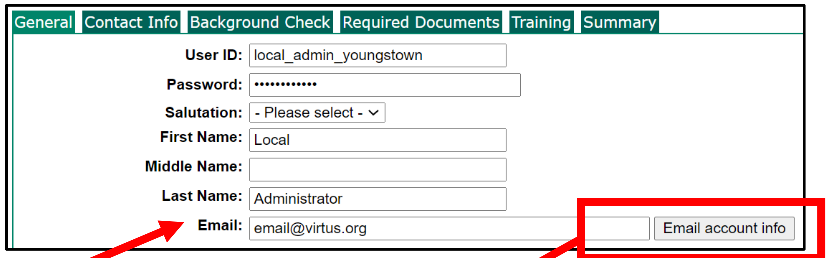


How to assist with recovering an individual's username or password as a Compliance Officer?

1. The Compliance Officer may assist with recovering the username/password for accounts that already exist.

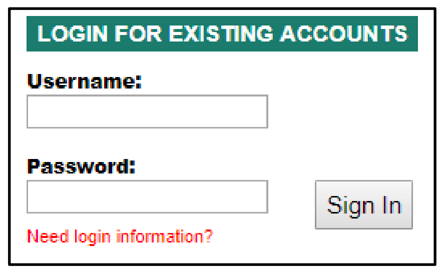
2. Once the account is location, click on the last name to pull up the profile information.

   a. If the Compliance Officer shares the same "Primary" or "Additional" location as the individual, then the administrator can ask the system to send the individual his/her user ID and password.

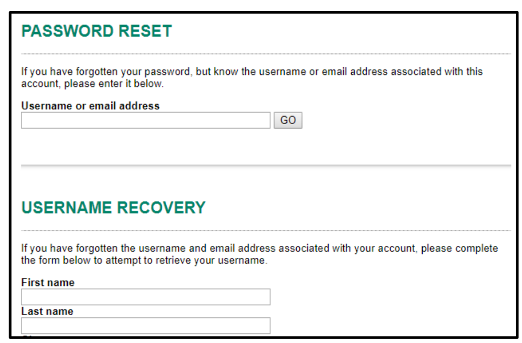


      i. First, the Compliance Officer should check that the email listed within the account is accurate

      ii. If the email is not accurate, then please contact the diocesan office to update the email address.



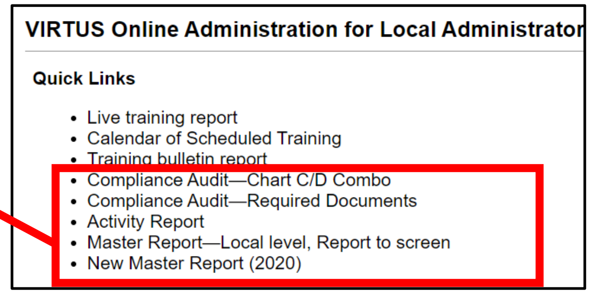
      iii. Once the email is updated and correct, select "Email account info," and ask the individual to retrieve the message from their email account and proceed accordingly.



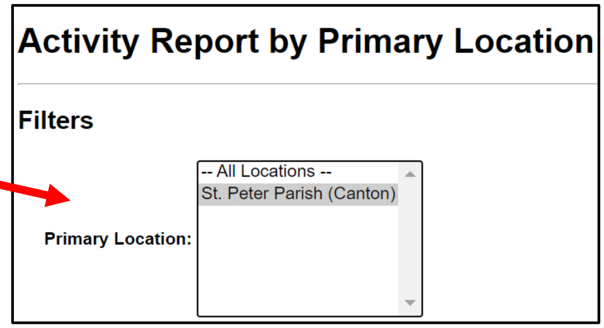
   b. If the Compliance Officer does not share the same "Primary" or "Additional" location as the individual, the Compliance Officer can only inform the individual of his/her User ID and request that the individual use the password recovery function on the homepage of https://www.virtus.org.

How to create Reports within VIRTUS Online?

1. There are various reports that can be created using VIRTUS Online. To begin, select the “Administration” tab from the tabs at the top of the page. Then choose a report within Quick Links. The reports can be viewed on the **screen** or exported to a **CSV file and saved in Excel format.**



2. The **Activity Report** allows an overall view of the Primary Location’s Training, Background Checks run, and Required Documents acknowledged in the date period selected. Select the needed filters to build the needed report. The selections will remain selected until revised.

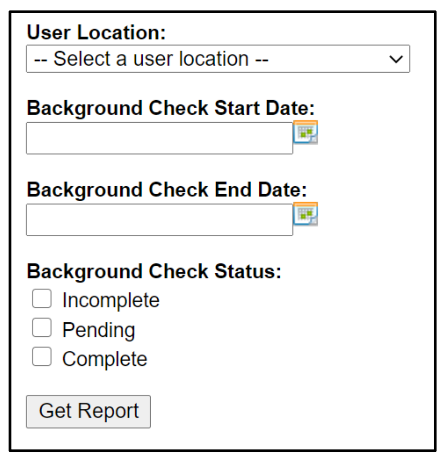


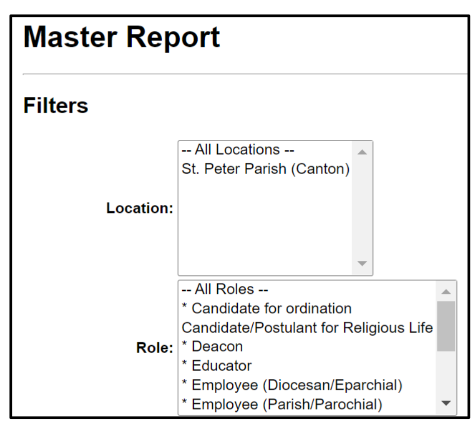
3. The **Background Check Report by Date, Locaion, Status** displays a list of users and a report of their background checks, filterable by background check date, user location, and background check status.

   You may filter the background check report by any of the criteria below, but none are required.

   If the date filters are used, the report will include all background check records created between the start date and end date.

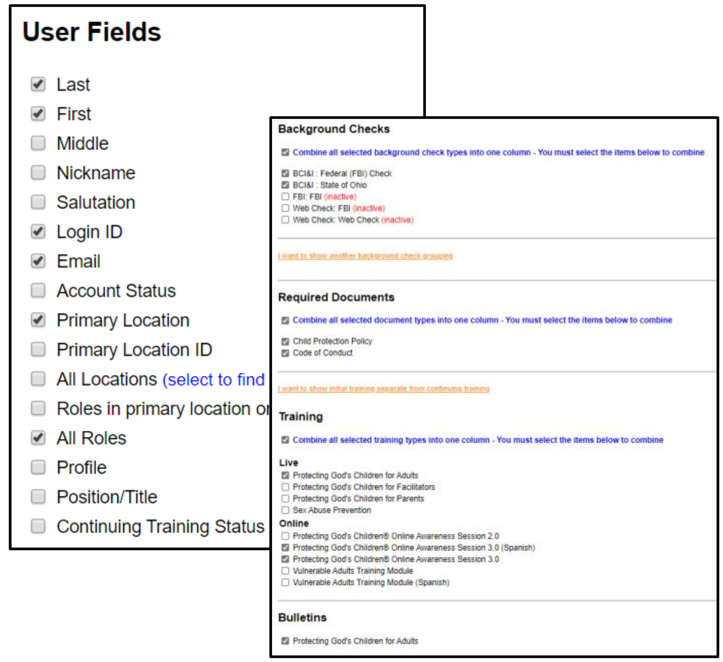
   All checked statuses will be reported. If no status is checked, all statuses will be included in the report; Incomplete, Pending and Complete. Within the report, you can drill into the user’s record to review.



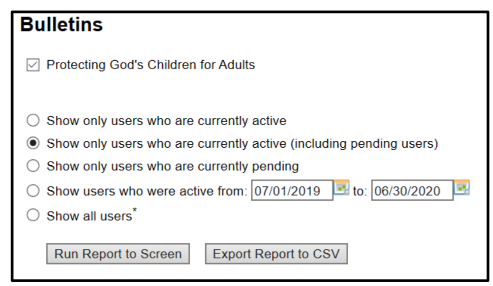


4. The **New Master Report – 2020** is essential for auditing locations and combining all the most important details into one easy to read report is the New Master Report.

This report allows coordinators to filter user requirements revealing only the most recent dates of completion. This report offers you the flexibility of combining or listing requirements separately.



In addition to filtering locations and/or roles, the new master report can filter users who are currently active, active and pending, or reveal all users active and inactive for a location. This is very helpful as an end of year report for locations. When the report is run to screen, the abilty exists to drill into each account within the Master Report. This opens another window that can then be closed after reviewing or making any needed adjustments.



5. The **C/D Report** assists diocesan coordinators with completing the Audit C/D report. It gathers and totals Role data for specific line items on the annual audit, such as training and background checks. It will report Role totals regarding the # of complete and # of not compete items for the audit period selected. To access this report, select the Administration tab, then the quick link for Compliance Audit- Chart C/D Combo. Choose your report year, your location, and training and background check renewal parameters from the drop-down menus. Select the Run button.