**NEW MASTER REPORT 2021 INSTRUCTIONS**

**DURING COVID-19**

The Master Report:

* Helps you monitor compliance for an entire location or multiple locations in one report
* Helps you monitor the 3 areas for adult compliance in one report, as well as bulletins
* Allows you to run the report to screen or run the report to Excel
* Allows you to go back and forth between the master report and individual VIRTUS® accounts

To Run a Master Report:

1. Log in to your VIRTUS® account at [www.virtus.org](http://www.virtus.org).
2. Click on the “Administration” tab at the top of the page.
3. Click on the “New Master Report (2021)” link at the bottom of the list of “Quick Links” provided.
4. Click to select and highlight the location(s) you wish to monitor with your report.
5. If you wish to select more than one location to view in the same report, hold down the Ctrl key and click on the additional location(s) you wish to include.
6. Scroll down to the “User Fields” section and click on the following:

* Last
* First
* Account Status
* All Locations (so you can see users with secondary locations)

1. Scroll down to the “Background Checks” section and click on the first option shown in blue: “Combine all selected background check types into one column – You must select the items below to combine.”
2. Click on all of the options for background checks.
3. Scroll down to the “Required Documents” section and click on the first option shown in blue: “Combine all selected document types into one column – You must select the items below to combine.”
4. Click on these 3 items next:

* Ethics and Integrity in Ministry (EIM) Code of Conduct Policy
* Signed EIM
* Signed Minor’s Code of Conduct

1. Scroll down to the “Training” section of the report and go to the “Live” portion. Then click on “Protecting God’s Children for Adults.”
2. In the “Online” portion of the “Training” section of the report, click on these two modules: *Mandated Reporters: Recognizing and Reporting Child Abuse* and *Protecting God’s Children Online Awareness Session 3.0.*
3. Scroll down to the “Bulletins” section of the report and click on the “Protecting God’s Children for Adults” box.
4. Next you can choose one of the following options, depending on your preference. I normally select to show only users who are currently active or those active and pending.

* 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 active for a certain timeframe
* Show all users (including inactive users)

1. Select and click on either the “Run Report to Screen” option or the “Export Report to CSV” option. The CSV option means an Excel spreadsheet. If you select the CSV option, you will also get a link to download the report. For my purposes, I normally select the “Run Report to Screen” option but you can use either one – whichever one helps you the most.
2. Once the report has run, you will find a listing of all the people with active VIRTUS® or pending accounts for your location(s). If you find active individuals on your report that are no longer employed or no longer volunteering with minors at your location, it is recommended that you email these names to Sherry. Their accounts can be inactivated by the Office of Child and Youth Protection or your location can be removed from their account.
3. There should be a date listed in the “Protecting God’s Children for Adults” column of the report showing when each person took our training. If there is no date, this training has not been completed yet.
4. For the online training modules, there should be dates listed in each of the columns. If there is no date or the column just says “Assigned,” the person has not yet completed the online module(s).

Special Note: During COVID-19, a person either needs to have attended a live PGC workshop in the past or they must complete both of the online training modules to be fully compliant with our training requirement.

1. For those required to read monthly training bulletins, you will see how many have been featured in VIRTUS, how many each person read, and how many they have missed. If NA is listed, that person is not required to read monthly training bulletins.
2. There should be a date listed in the “Background Check” column. If there is no date, we have no background check in VIRTUS for this person. If the date is older than 5 years from today’s date, it is time for the person to complete a new background check.
3. There should be a date listed in the “Document” column of the report to show that the person has a signed EIM in VIRTUS. If there is no date, there is no EIM and the person needs to complete this.

Other Tips:

1. If you wish to print your report, consider printing it in landscape to capture all of the report’s fields.
2. You can try other ways to run this report if there are additional fields that would help you. These instructions are simply a guide for you as you begin working with it.
3. If you want to look at an individual account while working in the Master Report, just click on the last name and it will take you directly to their account so you can review it. When you are finished reviewing it, close the window of the user’s account to return to your Master Report again.
4. VIRTUS saves the fields you selected when running your Master Report so you will know what you selected the last time. You can change them for future reports, if you wish.

2/1/21