

Safe Environment Audit Instructions for the audit period July 1, 2023 – June 30, 2024

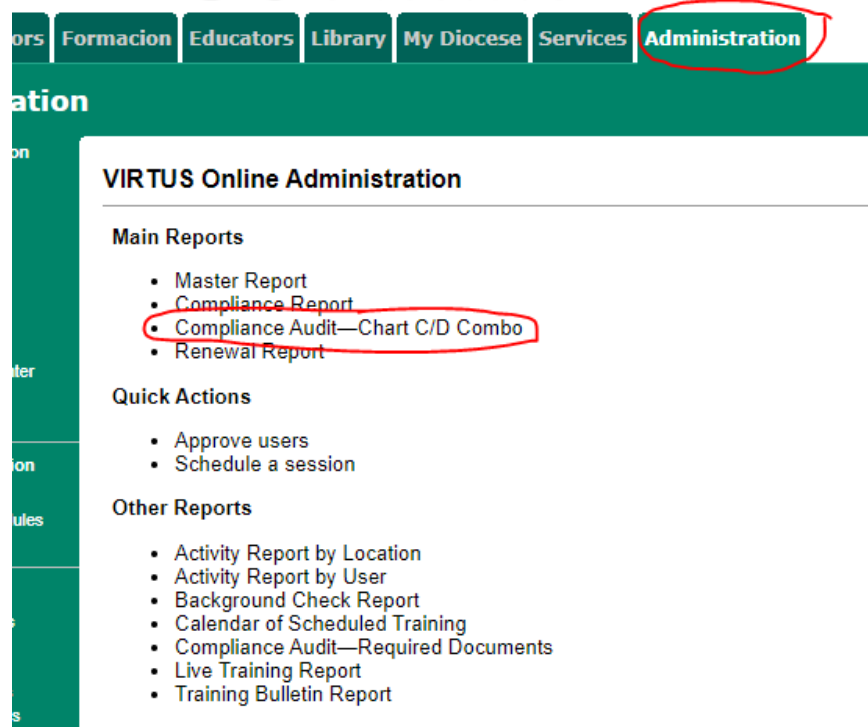
Thank you for all of your work during this audit period to ensure compliance within your location!

The following Virtus reports must be submitted with the completed and signed acknowledgment form by every location (Parish and School) to the Diocesan Safe Environment Office on or before **June 20, 2024**.

1. A Compliance Audit- Chart C/D Combo Report
2. A Compliance Report
3. A completed and signed Acknowledgement Form

Instructions for accessing a Compliance Audit- Chart C/D Combo Report:

From the Administration Tab, Select **Compliance Audit-Chart C/D Combo**



Screen One: Choose the first option highlighted below.

Compliance Audit - Chart C/D

There two different methods for running this report:

- 1. Include users who were active at ANY TIME during the audit period**
This is the traditional method and the method that has been the understanding from the earliest audit reports.
2. Include users who were active on June 30 of the current audit period
This is the method that is currently defined on the audit materials produced by the USCCB and is the method used by the current auditors as of the 2018 audit period

Alternate Version

- Include users who were active on December 31 of the current audit period
This is an alternate method that is not currently requested by the USCCB. This version should not be used for your USCCB audit submission.

Screen Two: The current report year will appear, from the drop down menus. Choose “Forever” for Training and “5 years” for Background Checks. Filter it by your location

Formacion Educators Library My Diocese Services Administration

Compliance Audit - Chart C/D (Active on June 30, 2024)

Report Year: 2024 (7/1/2023 - 6/30/2024) Training is valid for: Forever Background checks are valid for: 5 years Run [Filter by location](#)

Screen Three: Run and print this report. It includes all of the roles and Empowering God’s Children Program information for the filtered location.

Formacion Educators Library My Diocese Services Administration

Compliance Audit - Chart C/D (Active on June 30, 2024)

Report Year: 2024 (7/1/2023 - 6/30/2024) Training is valid for: Forever Background checks are valid for: 5 years Run [Filter by location](#)

Report Period: 07/01/2023 to 06/30/2024

Limited to: [REDACTED]

Category	Total Required to Comply	Total Opt Outs	Total Trained	Total not trained	Total Backgrounds Completed	Total Backgrounds Remaining
Children/Youth		0	151		N/A	N/A
Priest	1	N/A	1	0	1	0
Employee	3	N/A	3	0	3	0
Volunteer	57	N/A	57	0	57	0

Per the USCCB audit materials, these numbers reflect the total number of active individuals as of June 30, 2024

Instructions for accessing a Compliance Report:

From the Administration Tab, Select **Compliance Report**

THE NATIONAL CATHOLIC RISK RETENTION GROUP, INC.

VIRTUS[®]Online

Home Facilitators Formacion Educators Library My Diocese Services **Administration**

Administration

System Administration

- New User Signups
- Preregistered Users
- Users
- User Search
- Roles
- Profiles
- Locations
- Groups
- Communication Center
- Message Board
- System Setup

Training Administration

- Training Bulletins
- Online Training Modules
- Live Training

Reports

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

Choose your location, All Roles, All Profiles and Compliant (Any). Please check BGC and Training in the Items Box. Run the report then print it. An Excel document may work easier for locations with multiple pages. Either format will be accepted.

Compliance Report

Use this page to see user compliance status

First Name: Last Name:

Compliant: **- Any -** Active: Yes Expires: 30 days

Location: AHS (Merrillville) Role: **- All -** Profile: **- All -**

Items: BGC Bulletins Documents Training

Run Report Reset Cancel Export Update Inactivate