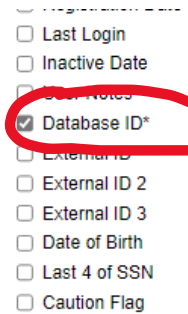


## Instructions for Entering Virtus Database ID into ParishStaq

### Virtus – instructions for syncing a list of parishioners

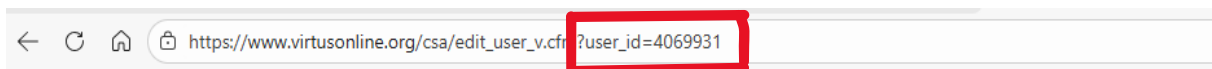
- I. Create a **Master Report** for your location(s) using the attached instructions. **IMPORTANT:** Add the User Fields filter for **Database ID\*** (circled in RED at right).
- II. This Master Report will list all active users and the unique Database ID# for each profile. **Important reminder:** each profile has a unique database ID, so if someone has multiple profiles it is important to merge them before entering the ID# into their ParishStaq account.
- III. If you discover multiple profiles, please reach out to the SEP office by email, provide the name and login ID for each profile and request a merge. Once merged you can then proceed to sync with ParishStaq.



A vertical list of checkboxes for user fields. The 'Database ID\*' option is checked and circled in red. Other options include Last Login, Inactive Date, External ID, External ID 2, External ID 3, Date of Birth, Last 4 of SSN, and Caution Flag.

### Virtus – instructions for syncing an individual profile

- I. When a user creates a new Virtus profile, an email notification will be sent to the local coordinator. This is a good time to check the profile for accuracy, and take time to enter the database ID into ParishStaq.
- II. If you are aware that a profile has a duplicate, please email the names/login information to the SEP office *prior to entering the ID # into ParishStaq*, and wait for a response indicating that the merge is complete. Once complete proceed to #IV below.
- III. If there are no duplicates, proceed to #IV below.
- IV. Access the General tab of the profile that you want to sync.
- V. The database ID is found in the URL at the top of your screen.

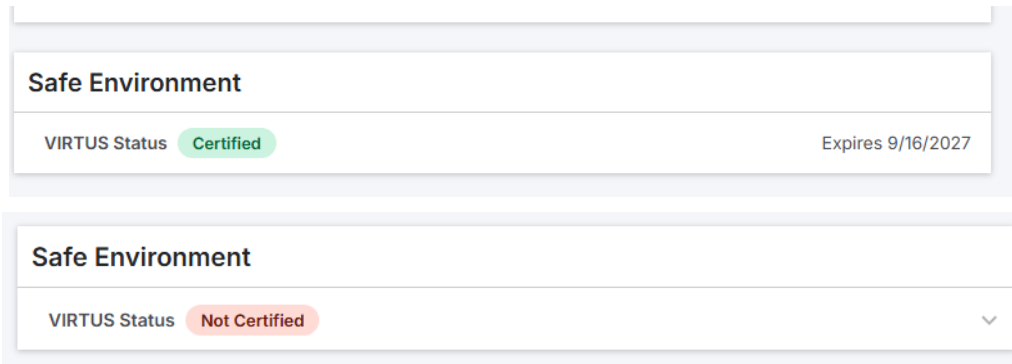


- VI. You are now ready to enter this number into ParishStaq.

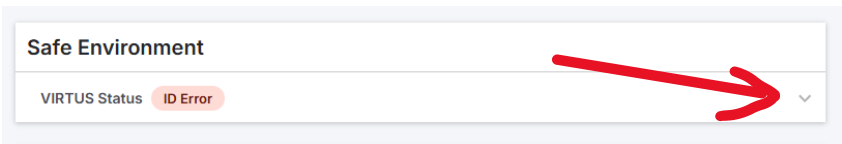
### ParishStaq:

- I. Use the **People Search** function to locate the parishioner's account
- II. Once you have located the proper member, scroll down to find the **Safe Environment section**.

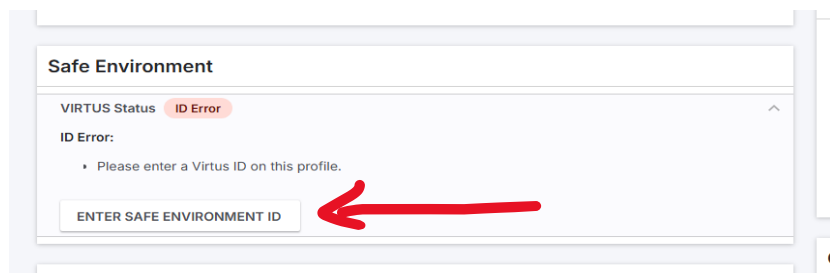
- a. If the Virtus database ID is already entered, the status will be indicated: Certified (green) or Not Certified (red).



- b. Be sure to follow up with any individual who is not certified. If they are currently active, they must come into compliance ASAP with whatever SEP requirements are lacking. If they are no longer actively serving, be sure to inactivate their Virtus profile.
- c. If the database ID is not in ParishStaq the status will show an error. Click on the “down arrow” to expand the section.



- d. Click the button “Enter Safe Environment ID”.



- e. Click the button “Enter Safe Environment ID”. Enter the Database ID number onto the appropriate line. Click “SAVE”.

Please take time to manage this information. Enter new Virtus Database IDs into ParishStaq promptly to ensure the integration of the two databases remains accurate. This will result in staff and ministry leaders being able to view whether a particular volunteer or employee is compliant with their SEP requirements. *Best practice: check ParishStaq monthly when you do your SEP compliance review.*

