

Diocese of Winona-Rochester

HOW TO UPDATE A PROFILE ON VIRTUS – GENERAL TAB

Log on to VIRTUS, click on the “Administration” tab. On the far left in the green under “System Administration” click on “User Search”.



Type in last name of the person you are looking for (make sure you check the “Show inactive users” box. If you do not find the person by last name, try the first name. Searching using less delivers the best results.



A list should appear, click on the last name of the person you are looking for, you will get their profile page.

User Search

Enter a piece of information about the user:
(user id, first, last, email)

Show inactive users:

Search Results for: Hamann

4 matches found.

Last Name	First Name	Middle Name	User ID	User Email	Status	Trained
Hamann **	Carlie	J	CarlieHamann	chamann01@gmail.com	Active User	05/07/2019 6:00 PM
Hamann	Kaitlyn	Maureen	khaman04950	khaman04950@viterbo.edu	Inactive user	03/07/2013 9:30 AM
Hamann **	Kathy		kathyhamann1741	hamannk@iw.net	Inactive user	09/26/2011 6:00 PM
Hamann	Mary	A.	mhamann	mhamann@dow.org	Active User	08/01/2012 9:00 AM

Here you can make many changes. Change the last name (someone gets married), a new email address. Next to the email address is a box that says “Email account info”, click on this and VIRTUS will send an email to the user with their log in information (for someone who forgets).

In the **YELLOW** section you can change their “Profile”, for instance from “School Teacher” to “Basis User”, etc. Here you can also change their continuing training to read or not to read monthly training bulletins. If you want them to read bulletins then select “Required to complete continuing training using VIRTUS Online monthly bulletins” **If they were VIRTUS trained before being required to read bulletins then you will need to contact the Office of Safe Environment to change their bulletin start date.** Lastly, you can make someone inactive here as well, be careful just because he/she may not be at the church/school they may still be volunteering at another church and vice versa. If another location is listed, then do not inactivate them, just remove your location from the user profile leaving them active. To do this click on the **RED** and type in the ending date of their service and then click SET.

Across the top, also in green under the person’s name are tabs: **Contact Info**, **Background Check** (here you record a completed background check), **Required Documents** (here you record Code of Conduct), the **Training tab** which will show the training and bulletin information and finally the **Summary** tab see below.

General Tab

Hamann, Carlie

General | Contact Info | Background Check | Required Documents | Training | Summary

User ID: Carlie-Hamann
 Password: *****
 Salutation: -- Please select --
 First Name: Carlie
 Middle Name: J
 Last Name: Hamann
 Email: chamann01@gmail.com [Email account info]

Primary Location: Diocese of Winona-Rochester Pastoral Center

Primary Role	Role	Location	Start	End
<input checked="" type="checkbox"/>	Employee (Parish/Parochial)	Diocese of Winona-Rochester Pastoral Center-Winona (Winona)	Edit	—

+ Add Role and Location

Showing 1 to 1 of 1 entries Show Inactive

● = End or delete role | Ending all roles does not inactivate the account

Title or Function: General maintenance
 External ID:
 Group: -- Please select --
 Contact w/ Minors?: (No)
 Supervisor or Manager?: (No)

Profile: Basic User [\[click to show profile details\]](#)

Continuing Training: Not required to complete continuing training

Account status: Active

Service Began: 05/08/2019
 Service Ended:
 Last Login:

Communication Options: Receive training bulletin reminders via email

Special User Options: This individual is a facilitator
 This individual has access to the educator tab
 This individual is a local administrator
The user's administrative rights are limited based on the options you choose below
 SELECT RIGHTS... | SELECT LOCATIONS...
CAUTION

Notes:

[Save] [Save and Review] [Cancel]

The profile page is also where you can set up the 'Primary Role' and 'Location' This is a great place to know where an employee or volunteer has last worked or volunteered. You can change/add a location for the user here as well by clicking on **+ Add Role and Location**

Primary Location: Diocese of Winona-Rochester Pastoral Cente  

Roles:

Primary Role	Role	Location	Start	End	
	Facilitator	Cathedral of the Sacred Heart-Winona (Winona)	Edit	—	
Set Primary	Employee (Diocesan/Eparchial)	Diocese of Winona-Rochester Pastoral Center-Winona (Winona)	10/22/2019	—	
Set Primary	Volunteer	Cathedral of the Sacred Heart-Winona (Winona)	Edit	—	
+ Add Role and Location					
Showing 1 to 3 of 3 entries					<input type="checkbox"/> Show Inactive

 = End or delete role | Ending all roles does not inactivate the account

*******ALWAYS, ALWAYS click on the “Save & Review” button at the bottom of the profile or all your changes will be lost.*******

NEVER LEAVE A PERSON ACTIVE WITHOUT A LOCATION LISTED! IF YOU ARE REMOVING THEIR ONLY LOCATION PLEASE MAKE THEM **INACTIVE.**