

GENERAL INSTRUCTIONS – SAFE ENVIRONMENT AND EMPOWERING GOD’S CHILDREN AUDIT

General Schedule Instructions:

- I. All parishes must complete Schedules A, B, and C
- II. All parishes with a school must complete Schedules A, B, C, D, E, and F
- III. The three (3) High Schools must complete Schedules A, D, E, and F
- IV. The categories listed below were defined by the USCCB and their use is critical to efficient data collection and reporting.
 - i. CHILDREN/YOUTH
 - ii. PRIESTS
 - iii. DEACONS
 - iv. CANDIDATES FOR ORDINATION
 - v. EMPLOYEES
 - vi. EDUCATORS
 - vii. VOLUNTEERS

Schedule A through F Detailed Instructions:

1. Schedule A – Clergy
 - a. Please include all retired priests and/or deacons who continue to celebrate the occasional Mass, wedding, baptism, etc.
 - b. Please include Deacons and Candidates for Ordination who visited your parish or school.
 - c. All entries will be labeled as “PRIEST”, “DEACON” or “CANDIDATE FOR ORDINATION”
2. Schedule B – Parish Staff
 - a. Please include all adults in the parish who receive a W2 or 1099 tax form only.
 - b. All entries will be labeled as “EMPLOYEE”.
3. Schedule C – Parish Volunteers
 - a. Please include all adult volunteers who have contact with children or vulnerable adults.
 - b. All entries will be labeled as “VOLTUNTEER”.
 - c. If an adult is included on “Schedule B – Parish Staff”. Please do not create a duplicate entry on “Schedule C”.
4. Schedule D – Principal and Teachers
 - a. Please include only the Principal and Teachers.
 - b. All entries will be labeled as “EDUCATORS”.
5. Schedule E – School Staff
 - a. Please include all adults in the school who receive a W2 or 1099 tax form only.
 - b. All entries will be labeled as “EMPLOYEE”.
6. Schedule F – School Volunteers
 - a. Please include all adults volunteer who work in any capacity in your school.
 - b. All entries will be labeled as “VOLTUNTEER”.
 - c. If an adult is included on “Schedule B – Parish Staff” or “Schedule E School Staff”. Please do not create a duplicate entry on “Schedule F”.
7. Schedule G - Action Plan
 - a. Complete Schedule G with the names of all employees, volunteers, clergy, and candidates for ordination who are not yet in compliance. For each entry, please provide an explanation in the “Comments” field.

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8. How to complete Schedule G.
 - a. All the data need to complete Schedule G is contained in Schedules A through F. It needs to be transferred filtered and transferred to Schedule G using copy and paste functions. All Schedules contain the same fields. Therefore, for this instruction Schedule A will be the model.
 - b. Step 1 – Check the “VIRTUS TRAINING” and “BACKGROUND CHECK” Tabulation Charts for the number of “NO’s”.
 - i. If there “0” there is nothing to report.
 - ii. If there are one or more proceed to Step 2.
 - c. Step 2 – Filtering for data transfer.
 - i. Click the down arrow on the right side of “VirtusTraining”
 - ii. Uncheck (Select All).
 - iii. Check (No) and Click OK.
 - iv. This will filter all noncompliant entries.
 - A. Data Check – the number of filtered records must be = to the number in the Tabulation Charts
 - d. Step 3 – Data Transfer
 - i. Starting in Column A under “LastName” depress and hold the left mouse button. Move the cursor to Column F highlighting all filtered records.
 - ii. Use “Ctrl+C” to copy the records (the selected records will be highlighted by dash lines.
 - iii. Move to Schedule G
 - iv. Place your cursor in Column A under “LastName”
 - v. Use “Ctrl+V” to paste the records into Schedule G
 - e. Clearing filter
 - i. Click the down arrow on the right side of “VirtusTraining”
 - ii. Click “Clear Filter From “VirtusTraining””.
 - f. Repeat Steps c, d, and e for BackgroundCheck.
 - g. Repeat Steps c, d, and e for all Schedules with noncompliant record entries.