How to Use and Fix Roles via the History in VIRTUS

VIRUTS has updated the new role/location grid tool to give you the ability to edit existing roles/locations for those location you oversee.

You will see how to fix roles, we are limiting the roles that we want you to use. There are currently 117 roles and we hope to cut that way back to 34. The roles are currently a mess so that will take time to move everyone from the old version of roles to the new version of roles so please be patient.

You will need to set the "primary" roles as well as the "primary location" The edit feature allows you to change the start date and end date.

Primary Location:
- You might see your location first and you might not. If you are the primary location for the person please use the drop down button to change it. If you want the person "inactive" for your location, we can do that BUT the location will still show in the "drop down" box. This DOES NOT mean that person will show up on your "Master Report 2020".

Roles:
Please from now on use these role parameters. We will be making some adjustments to questions as well so I will let you know when that happens and how this will adjust these areas.

- Business Mgr/Bookkeeper/Finances
- Candidate for Ordination
- Candidate for Ordination – Deacon
- Candidate for Ordination - Seminarian
- Chaperone - Overnight
- Deacon
- DRE/CRE
- Educator
- Employee (Chancery)
- Employee (Parish/School)
- Employee working with minors

- Employee working with vulnerable adults
- Employee working with minors and vulnerable adults
- Employee working with monies
- Employee NOT working with minors
- Employee NOT working with vulnerable adults
- Employee NOT working with minors or vulnerable adults
- Host Parent
- MFP Participant (Spanish)

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- Potential New Employee
- Principal/Asst Principal
- Priest
- Safe Environment Coordinator
- Scout Leader
- Special Needs - Supervised
- Volunteer
- Volunteer working with minors
- Volunteer working with vulnerable adults
- Volunteer working with minors and vulnerable adults
- Volunteer working with monies
- Volunteer NOT working with minors
- Volunteer NOT working with vulnerable adults
- Volunteer NOT working with minors or vulnerable adults
- Youth Minister

Primary:

- You need to have the primary role selected. You will see verbiage that says "set primary" click on one of the USCCB roles only; (Candidate of Ordination/Deacon/Educator/Employee (Chancery)/Employee (Parish/School)/ Priest/Volunteer).
- Once you select the Primary Role it will show with a green circle with white check, this will be how a person is counted for the Stonebridge Audit.

Start date:

- Click the date or the word "edit" in the start date column of the role/location row you wish to edit. You will notice there is a date in here for "start" I use the oldest date listed on the person's "training" tab for the video requirement. Employees you can use your payroll dates for their beginning date.

End date:

- If a person is not doing anything in that role for you anymore you Click on the Red stop sing and put an end date and have me make them "inactive".

Add a Role and Location:

- If you need to add a role you will click on the blue "+Add Role and Location".
- Select again from the 34 roles listed above to add to the person's record.

This is how a person's record should look.

You will notice you have a green circle with white check and a start date. This is how it should look for each role.

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- You will see an end date for that role you are not using as an "active" role for the person, if you checked the "show inactive" you would see those positions no longer active.

- If the role of volunteer was never correct and it needs to be removed completely, click the red link labeled, "Remove this role without saving history", but not if a person left that position.

- Every person should have what they do in the "title or function" box. Since we have redone the roles, you would list "helper", "catechist" etc. since we won't put them up in the Roles area.

Make sure the "Profile" matches what you selected as the Primary in the "Roles" area above.