

Instructions for Entering Virtus Database ID into ParishStaq

In Virtus:

- 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 their unique Database ID#.

- State
- ZIP
- Daytime Phone
- Evening Phone
- Group
- Approval Date
- Registration Date
- Last Login
- Inactive Date
- User Notes
- Database ID*
- External ID
- External ID 2
- External ID 3
- Date of Birth
- Last 4 of SSN
- Caution Flag

In ParishStaq:

- I. Use the **People Search** functionality and apply the filters identified in the screen shot to the right.
- II. This will create a **list of members with a Virtus Database ID** already in the system. Cross these members off your Master Report. You will NOT need to re-enter these numbers.
- III. **For the remaining members** on your Master Report please complete the following steps:
 - a. Once you have located the proper member, click on the **EDIT PROFILE** button.
 - b. Click on the ADMIN tab at the top. Scroll down to the Identification section.
 - c. Enter the 7-digit Virtus Database ID# from your Master Report. **Please cross-check that you have entered the correct ID# for the member you have selected.**
 - d. Click "SAVE".

Apply filters below:

Safe Environment ID ▾ Is Set ▾

The screenshot shows the 'Edit Profile' interface. At the top, there are two tabs: 'ABOUT' and 'ADMIN'. The 'ADMIN' tab is selected and circled in red. Below the tabs, there is a 'Membership' section with a dropdown menu for 'Reason Left Church'. The 'Identification' section is highlighted with a red box and contains several input fields: 'Giving Number', 'Safe Environment ID' (circled in red), 'Fundraising ID', and 'Diocesan ID'. Below these is an 'Envelope User' dropdown menu. At the bottom of the form, there is a '+ ADD SIGNIFICANT EVENT' button and a 'SAVE' button (circled in red) next to a 'CANCEL' button.

Having this Virtus ID in the ParishStaq program will allow for the integration of the two systems. This will result in ministry leaders being able to view whether a particular volunteer or employee is compliant with their Safe Environment Requirements directly on the ABOUT page of each member in ParishStaq. **Thank you for your assistance with data entry!!**