

**ParishSOFT®**

*Church Management Software and Web Solutions*

Toll Free 866.930.4774

[www.parishsoft.com](http://www.parishsoft.com)

SAFE ENVIRONMENT PROGRAM MANAGER



# SAFE ENVIRONMENT PROGRAM MANAGER USER GUIDE

For Dioceses

## Safe Environment Program (SEP) Manager User Guide for DIOCESES

Pub 12R3\_DIO, January 2009  
for use with

ParishSOFT Safe Environment Program (SEP) Manager  
Version 3.6.2x and later



825 Victors Way  
Suite 200  
Ann Arbor, MI 48108-2830

Web: [www.parishsoft.com](http://www.parishsoft.com)  
Email: [info@parishsoft.com](mailto:info@parishsoft.com)  
[support@parishsoft.com](mailto:support@parishsoft.com)  
Phone: (734) 205-1000 main  
(866) 930-4774 support  
Fax: (734) 205-1011

© 2009 ParishSOFT LLC, all rights reserved.  
ParishSOFT grants licensed users the right  
to unlimited duplication of this publication  
for internal use.

All examples, graphics, and screening results used  
in this document were created using the records of  
fictitious persons.

# CONTENTS

---

<b>CHAPTER 1: GETTING STARTED .....</b>	<b>7</b>
<b>Key Concepts .....</b>	<b>8</b>
<b>SEP Manager Overview .....</b>	<b>8</b>
<b>A Framework for Your SEP and Screening Processes .....</b>	<b>8</b>
Initial Setup Requirements.....	8
<b>Position-based Requirements .....</b>	<b>8</b>
Screening Results Shared Among All Position Types.....	8
<b>How SEP Manager Works with Diocesan Directory .....</b>	<b>9</b>
Sr. Mary Teachmeall Example.....	9
<b>Login-Based System Privileges.....</b>	<b>10</b>
<b>Administrator Types and Security.....</b>	<b>10</b>
Secure Logins .....	10
Organization Administrators.....	10
Global Administrators.....	11
<b>Related Tasks .....</b>	<b>12</b>
<b>Log In to Your Secure SEP Manager Website .....</b>	<b>13</b>
<b>Log in from Diocesan Directory.....</b>	<b>13</b>
<b>Log in from Web Browser .....</b>	<b>14</b>
<b>What's My Login?.....</b>	<b>15</b>
<b>Add Website to Favorites .....</b>	<b>15</b>
<b>Protect Your Screening Data .....</b>	<b>15</b>
<b>CHAPTER 2: INITIAL SETUP FOR GLOBAL ADMINISTRATORS .....</b>	<b>17</b>
<b>Configure SEP Manager .....</b>	<b>18</b>
<b>Attention Organization Administrators.....</b>	<b>18</b>
<b>Before You Begin .....</b>	<b>18</b>
<b>Configuration Process.....</b>	<b>18</b>
<b>Related Tasks .....</b>	<b>18</b>
<b>Edit Status Values.....</b>	<b>19</b>
<b>Create New Status Description.....</b>	<b>20</b>
Status Mapping .....	20
Status Descriptions .....	20
<b>Merge/Delete Status Values .....</b>	<b>21</b>
<b>Delete Status Values.....</b>	<b>21</b>
<b>Edit Screening Requirements.....</b>	<b>22</b>
<b>Add New Requirement.....</b>	<b>22</b>
<b>Update Renewal Years in an Existing Requirement.....</b>	<b>23</b>
Update New Screening Requests Only .....	23
Update All Existing Screening Results .....	23
Update Existing Screening Results Based on Expiration Dates.....	23
<b>Remove a Requirement .....</b>	<b>23</b>

<b>Edit Categories.....</b>	<b>24</b>
<i>Edit a Category Description .....</i>	<i>24</i>
<b>Choose Requirements for Categories.....</b>	<b>25</b>
<b>Choose Categories for Positions .....</b>	<b>26</b>
<b>Review Requirements for Each Screening Category.....</b>	<b>27</b>
<b>Manage Background Screening Administrators .....</b>	<b>28</b>
<i>Assign/Edit Administrator Privileges.....</i>	<i>28</i>
Assign Global Administrator Privileges from the Diocesan Directory .....	30
<i>Who Are My Administrators?.....</i>	<i>30</i>
<i>Run Screening Administrators Report.....</i>	<i>31</i>
<i>System Security .....</i>	<i>32</i>
<b>Manage External Agencies .....</b>	<b>33</b>
<i>Specify External Agency in Requirement Details .....</i>	<i>33</i>
<i>Delete an External Agency.....</i>	<i>33</i>
<b>CHAPTER 3: USCCB OPTIONS FOR GLOBAL ADMINISTRATORS.....</b>	<b>35</b>
<b>Manage USCCB Group List.....</b>	<b>36</b>
1. <i>Configure USCCB List.....</i>	<i>36</i>
USCCB List Options .....	36
2. <i>Configure USCCB Positions .....</i>	<i>37</i>
3. <i>Set Up Audit Requirements.....</i>	<i>38</i>
4. <i>Configure USCCB Audit .....</i>	<i>39</i>
<b>CHAPTER 4: SEP MANAGEMENT IN YOUR DIOCESE.....</b>	<b>41</b>
<b>Request New Screening.....</b>	<b>42</b>
<i>Confirm the Successful Screening Request .....</i>	<i>43</i>
<b>Search the SEP Manager.....</b>	<b>44</b>
<i>Initial View of Screening Results.....</i>	<i>44</i>
Protection of Social Security Numbers .....	44
<b>Update Screening Details.....</b>	<b>45</b>
<i>Update Multiple Positions Sharing the Same Requirement.....</i>	<i>46</i>
<i>Update an Expired Requirement.....</i>	<i>46</i>
<i>Example Expired Requirement .....</i>	<i>47</i>
<i>Set Expired Status Manually .....</i>	<i>47</i>
<i>Requirement Status Symbols .....</i>	<i>48</i>
<b>About the Dashboard Display.....</b>	<b>49</b>
<i>Customize Your Dashboard .....</i>	<i>50</i>
<i>Switch from Dashboard View to Complete Details View.....</i>	<i>51</i>
<i>Dashboard Icon Missing? .....</i>	<i>51</i>
<i>Requirements Display Settings .....</i>	<i>52</i>

**APPENDIX A: SEP MANAGER REPORTS .....53**

**Run Background Screening Reports .....54**

    Acrobat Reader Required to Print Reports ..... 54

**Screening Expirations ..... 55**

**Check Incomplete..... 56**

**Risk Category Requirements ..... 57**

**Screening Administrators ..... 58**

**Summary by Parish..... 59**

**Compliance Audit..... 60**

**INDEX.....61**

{Intentionally Blank}

*CHAPTER 1*

---

*GETTING STARTED*

## Key Concepts

### SEP Manager Overview

ParishSOFT's Safe Environment Program (SEP) Manager helps you to protect those whom you serve by ensuring that the employees and volunteers across your diocese exemplify Christian ethics, civil law compliance, and personal integrity. SEP Manager tracks both your Safe Environment Program data and broader-based background screening requirements such as education, certification, and training.

Through the SEP Manager, staff members with background screening administrator privileges manage crucial background check requirements and report on screening progress. The progress of an individual through the screening process is recorded and instantly available via the secure website to all authorized users who need that information to make good decisions about staffing at both the professional and the volunteer levels across the diocese.

### A Framework for Your SEP and Screening Processes

SEP Manager provides a framework that lets each diocese design its own background check system according to the policies established (or in process) at the diocesan level.

ParishSOFT does **not** have preset, fixed screening requirements for your position types—instead, each diocese determines its own screening policies and decides which clearances are appropriate for its staff and volunteers. Individual parishes then use a common set of global Position Types and Requirements across the diocese.

### Initial Setup Requirements

A Diocesan Administrator with proper privileges will complete the *Initial Setup for Global Administrators* found in Chapter 2. If your organization has a defined set of policies for SEP and background screening, please use them as your guide when completing the setup.

If your organization has not adopted a background screening policy, you can use the material in Chapter 2 as a reference during your policy formation. You must have an understanding of your global diocesan SEP and background screening policies before you proceed with the initial setup.

### Position-based Requirements

SEP Manager is based on the Position Types in your AIM Diocesan Directory database. Staff and volunteers in the diocese may hold one or more positions within the diocese. Each of those Position Types has its own set of screening requirements. Thus, a volunteer who will work on the grounds can have a significantly lower risk category than a professional staffer who works with children. SEP Manager handles requirements for all of these cases.

### Screening Results Shared Among All Position Types

Each person within the diocese must pass a given requirement only once (unless that requirement expires). Once a person has passed a specific requirement, the “passed” result is distributed across all assignments and roles. Thus, if a psychological profile is required for each of several roles an individual serves in several organizations, the system will record the fact that this requirement has been met and passed, is pending, or has been failed for each of those assignments.



## How SEP Manager Works with Diocesan Directory

ParishSOFT's SEP Manager works hand-in-hand with the Diocesan Directory data and organizations to manage your background checks and track clearances in a way that is both simple and secure.

Recall that the Diocesan Directory organizes your data into three main categories:

- Organizations
- Assignments
- Persons

A person, for example, could have multiple positions within the diocese; and each position may have different background screening requirements. Global Background Screening Administrators determine and establish the global requirements for each assignment type.

## Sr. Mary Teachmeall Example

For example, in Table 1.1, Sr. Mary Teachmeall holds 2 positions within her diocese. She is the director of the Catholic Youth Organization and an Editor at Faith Magazine.

As CYO Director, she will work with youth. She must pass 6 requirements to serve in this **High** risk screening category position. Her **Low** risk position as Editor at Faith Magazine has only 4 requirements.

Sr. Mary has *Organization Administrator* privileges within the SEP Manager website. This gives her access to background screening results in the diocese. Sr. Mary can log in and review screening statuses to make informed decisions about staffing her organization with employees and volunteers.

Table 1.1: Example SEP Manager Requirements and Privileges

Diocesan Organization	Position Type (screening category)	Person	Screening Requirements (specific to Position Type)	SEP Manager Privileges
Catholic Youth Organization	Director (Screening Category: High)	Sr. Mary Teachmeall	Application	The Global Background Screening Administrator has given Sr. Mary Organization Administrator privileges for the Catholic Youth Organization. Sr. Mary can log in to the secure SEP Manager website and use the requirement completion statuses to make good staffing decisions for the CYO.
			Criminal Background Check	
			Fingerprinting	
			Reference Check	
			CYO Coaches Certification	
			Read Diocesan Code of Ethics	
Faith Magazine	Editor (Screening Category: Low)	Sr. Mary Teachmeall	Application	Sr. Mary is not a Background Screening Organization Administrator for Faith Magazine, so she can view but not edit background screening progress for any members of this organization.
			Criminal Background Check	
			Reference Check	
			Read Diocesan Code of Ethics	

## Login-Based System Privileges

What you can see and do within SEP Manager is based entirely on your user login and its associated system privileges.

The screens and examples shown in this manual may illustrate system functionality that is not available to you because of your system privileges. Please contact your diocesan Global Background Screening Administrator to request any changes to your system privileges.

### Administrator Types and Security

SEP Manager has a dual-level privilege system for administrators. Both administrator levels require at least a username, password, and login privileges for the Diocesan Directory, as well as administrator rights for the SEP Manager.

### Secure Logins

Administrator rights for SEP Manager are assigned separately to a person's Diocesan Directory login. So a user who is a Diocesan Directory administrator will not automatically have administrator privileges in SEP Manager.

Each Global Administrator assignment that you create **from the Diocesan Directory** program requires a unique password, available from ParishSOFT support at (866) 930-4774. Administrator assignments that a Global Administrator creates from within your secure SEP Manager website do not require an additional password from ParishSOFT support.

### Organization Administrators

This privilege level is appropriate for your organization managers who are responsible for making staffing decisions based on the pass/fail statuses of their organization members.

Organization Administrators can view screening results for any individual in the diocese. They can set pass, fail, or expired statuses for any member within their

*Table 2.2: SEP Manager System Privileges*

<b>Privileges</b>	<b>Organization Administrators</b>	<b>Global Administrators</b>
View screening results	•	•
Edit screening results	restricted to organization(s) where admin privilege is assigned; permitted if requirement is enabled for Parish Modify	•
Run SEP Manager reports	restricted to assigned organization(s) only	•
Complete initial SEP Manager Setup	not permitted	•
Grant administrator access to others	not permitted	•

organization for any requirements that permit edits to screening results at the parish level. They can also edit any *Parish Modify* requirements for individuals and view reports within the organizations that they administer. Organization Administrator rights do not carry over into other diocesan organizations.

**A Global Background Screening Administrator** can grant Organization Administrator privileges using the secure SEP Manager website. A person must have an existing assignment in the Diocesan Directory database and a valid login to access screening data before he can log in to the SEP Manager website as an Organization Administrator.

The example screen below shows the **Background Screening Privilege** levels for several members, as seen from the secure SEP Manager website. Administrator privileges are indicated by the checkmark under the appropriate name and privilege level. *Mary Ablemarle* has Organization

Administrator rights within the organizations *Corpus Christi Parish* and *Queen of Angels Elementary*. *Donald Acree* has Global and Organization Screening Administrator privileges within the organization *Archdiocese of Atlanta*.

### Global Administrators

This privilege level is appropriate for your diocesan screening administrator and any other individuals who need unrestricted access to SEP Manager screening requirements, system configuration, USCCB Audit, and data on persons within the diocese.

Global Administrators can edit screening results, access any reports, configure the system, and grant screening administrator rights to others.

Only a **DIOCESAN DIRECTORY Administrator** or another **Global Administrator** can grant Global

! All examples, graphics, and screening results used in this document were created using the records of fictitious persons.

Administrator background screening privileges.

A person must have an existing assignment in the Diocesan Directory database and a valid login before he can log in to the SEP Manager website as a Global Administrator.

The example screen below shows the **Background Screening Privileges** of a Global Administrator as seen from the Diocesan Directory program. The required fields **Global Administrator** and **Grant Login Privileges** have both been checked.

## Related Tasks

*Manage Background Screening Administrators, page 28.*

The screenshot displays the 'Assignment/Position Details' window for Person ID: 493823. The 'Access Rights' tab is active, showing a list of permissions for the 'Global Administrator' role. The 'Selected Assignment' is 'Archdiocese of Atlanta, Dir - Admin &'. The 'Start Date' is 09-05-2006 and the 'End Date' is blank. The 'Assignment' status is 'Disabled'. The 'Access Rights' section includes the following checked items: 'Backgrd Screening Privileges', 'Global Administrator', 'Primary Assignment', and 'Grant Login Privileges'. Below this, there are sections for 'Diocesan Directory & Web Solutions' and 'ParishSOFT Modules'. The 'Diocesan Directory & Web Solutions' section has 'System Administrator' unchecked and 'Diocesan Administrator' and 'Org. Administrator' checked. The 'ParishSOFT Modules' section has 'Select All' checked. The 'Web Solutions' section has 'Home Page', 'Calendar', 'Documents', and 'Forms' checked.

## Log In to Your Secure SEP Manager Website

Any user with a valid login to the AIM Diocesan Directory and Background Screening Administrator privileges can access the secure SEP Manager website.

### Log in from Diocesan Directory

You must have a valid login, Background Screening Administrator privileges, and permission to view, edit, and add member details in the Diocesan Directory database to access SEP Manager data from this screen. Complete the following steps.

1. Right click on the persons's name in the Diocesan Directory list view and choose **Assignments/Rights Detail** from the right click menu.
2. Select the **Organization** under **Assignment Details** list view.


The screenshot shows the 'Assignment/Position Details' window for Person ID 686730. The top section contains personal information: Status (Active), Prefix (Ms.), Middle (Isabelle), First Name (Abrams), and Suffix. Below this are tabs for Assignments, Positions, Access Rights, and Notes. The 'Assignments' tab is selected, showing a dropdown for 'Selected Assignment' (St. John the Evangelist (Elementary)). To the right, the 'Assignment Details' table is visible with columns for Organization, City, State, and Prime. The table contains one row: St. John the Evangelist (Elementary), Atlanta, GA, Teas. On the left side of the window, there are fields for 'Additional Person Status Information' including Login Username, SS Num (8157), Email Address, Email Username, Email Password, and Email POP3 Server. A 'Reset Password' button is next to the SS Num field. At the bottom, there are buttons for 'Background Screen' and 'Disable/End Date'.

3. Click the **Background Screen** button.

SEP Manager will verify your screening administrator privileges and, if you are authorized to view screening data, it will open and display the summary information

for the person whose details you had selected in Diocesan Directory.



Click on the person's name or the dashboard icon  to view screening details.

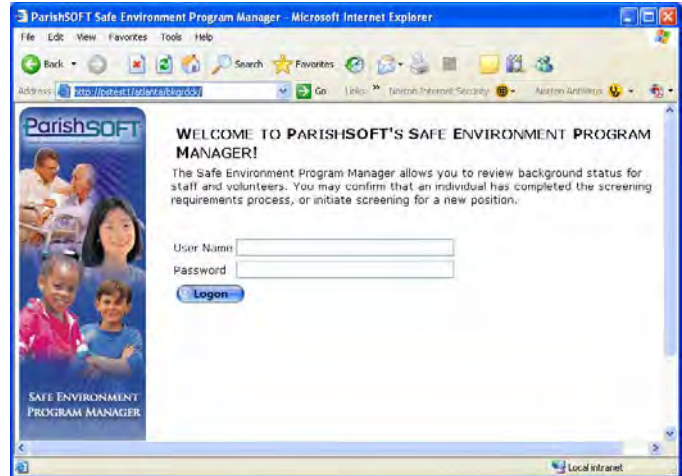
The background screening data and menus that you see are determined by your user privileges as set up in the Diocesan Directory. For example, the **Setup** menu is available only to Global Administrators. See *Login Based System Privileges* on page 10 for more information on privilege levels.

## Log in from Web Browser

You must have a valid username, password, and Background Screening Administrator privileges to access the SEP Manager data on your secure website.

1. Open your Internet Explorer and enter the secure Web address for your site  
(e.g., *http://[YOUR SERVER]/aimsync/bkgrdck*)  
Administrators can rename this address if desired.
2. Enter your AIM Diocesan Directory **Username** and **Password** and click the **Logon** button. Your *ParishSOFT Safe Environment Program Manager* window will open.

Your menu options are determined by your user privileges as set up in the Diocesan Directory. Global Administrators will have full menu options available; organizational administrators will not have the Setup menu option, since this option is restricted to Global Administrators. See *Login Based System Privileges* on page 10 for more information on privilege levels.



(Left) Initial SEP Manager view for users logged in as Global Administrators.

Person ID	Name	SSN	Organization	Position	Passed
263979	Abbott, Hannah	1565	Atlanta -- Cathedral of Chst The King	Chor Member	[9]
263979	Abbott, Hannah	1565	Atlanta -- Our Lady of The Assumption Parish	Cantor	[9]
850628	Abbott, Sarah	2109	Rome -- St. Mary (Elementary)	Teacher	[9]
970953	Ablemarle, Mary	5922	Stone Mountain -- Corpus Christi Parish	Admin - Arch Support	[9]
970953	Ablemarle, Mary	5922	Roswell -- Queen of Angels (Elementary)	Vol-child & vuln indiv	[9]
050513	Abraham, Jewell	0012	Marietta -- St. Joseph (Elementary)	Teacher Aide	[9]
171698	Abraham, Wanda	1318	Atlanta -- Archdiocese of Atlanta	Case Worker	[9]
686730	Abrams, Isabella	0157	Atlanta -- St. John the Evangelist (Elementary)	Teacher	[9]
965822	Abrams, Ronald	0419	Atlanta -- St. John the Evangelist (Elementary)	IT Support	[9]
031026	Accotolaris, Kimberly	2121	Roswell -- Queen of Angels (Elementary)	Guidance Cnstr	[9]
493829	Acree, Donald	4758	Atlanta -- Archdiocese of Atlanta	Dir - Admin & Gen	[9]
496742	Acree, Donna		Cumming -- St Brendan	Admin - Day Care	[9]

(Below) Initial SEP Manager view for Organization Administrators. The **Setup** menu is available only to Global Administrators.

## What's My Login?

If you do not have a login to your secure SEP Manager website, contact your diocesan administrator or global background screening administrator to request one.

## Add Website to Favorites

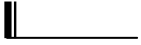
If you expect to access your SEP Manager frequently, add it to your list of Favorites for fastest access.

While your SEP Manager website is open in your Web browser, click **Favorites** menu > **Add to Favorites**.

## Protect Your Screening Data

You can provide additional security for your data by protecting your login. If you are a Background Screening Administrator, logoff or place your computer in hibernate mode when you leave your Diocesan Directory or SEP Manager applications unattended. From the Web, simply close your Web browser.

Do not make your username and password available to anyone else.



{Intentionally Blank}



## *CHAPTER 2*

---

# *INITIAL SETUP FOR GLOBAL ADMINISTRATORS*

## Configure SEP Manager

This process documents the steps required to configure your SEP Manager program. Global Administrators should use the procedures listed on this page and documented in this chapter to establish the requirements, screening categories, mappings, and Organization Administrators needed to manage an efficient and consistent SEP and background screening program from every organization in your diocese. This setup is required before your diocese or parishes can begin using the SEP Manager.

### Attention Organization Administrators

This chapter applies to Global Administrators only. If you are an Organization Administrator, please **turn to page 41**, *SEP Management in Your Diocese*, to learn how to request a new screening, search for people in the database, and update screening statuses.

### Before You Begin

Ensure that the following conditions exist before you begin your setup:

- Diocesan Administrator has provided you with a valid login and Background Screening Global Administrator privileges in the SEP Manager program.
- Diocesan Administrator has populated the **Position Types** lookup table using the Diocesan Directory software.

## Configuration Process

Global Background Screening Administrators must complete each step listed below before your diocese can begin using SEP Manager.

1. *Log in to Your Secure SEP Manager Website*, page 13.
2. *Edit Status Values*, page 19.
3. *Edit Screening Requirements*, page 22.
4. *Edit Categories*, page 24.
5. *Choose Requirements for Categories*, page 25.
6. *Choose Position Categories*, page 26.
7. *Review Requirements for Each Screening Category*, page 27.
8. *Manage Background Screening Administrators*, page 28.

Complete the process steps sequentially during your initial setup. Status Values, Requirements, and Categories are onetime setup items, although Global Administrators can incorporate new position types or requirements at any time.

### Related Tasks

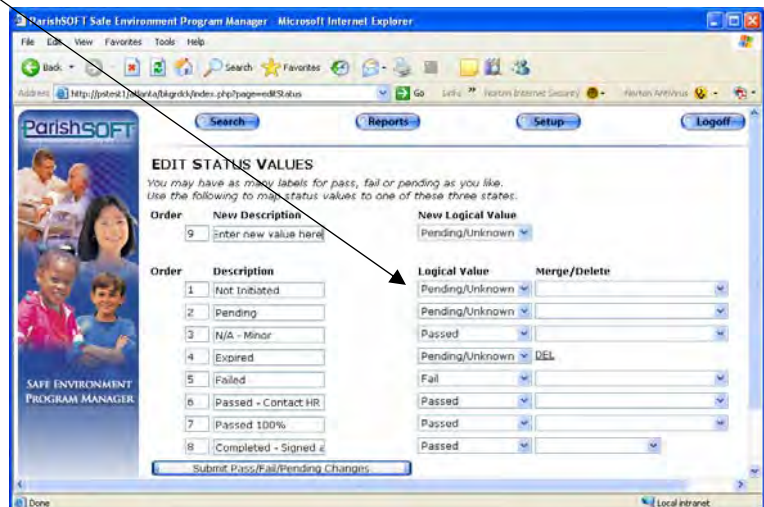
*Add Position Type*, see *Manage Lookup Tables* in the *AIM Diocesan Directory User Guide*, Chapter 1.

*Add Person to Diocesan Directory*, see *AIM Diocesan Directory User Guide*, Chapter 3.

## Edit Status Values

Use this procedure to customize the available status values for any given requirement. There are three logical status values available from the system: *Passed*, *Fail*, and *Pending/Unknown*. You can create any number of status descriptions and map those descriptions to a logical status value. This mapping gives you some flexibility in determining the varying degrees of completion progress that are possible through the background screening process. You must be a Global Administrator to edit status values.

1. Log in to your secure SEP Manager website using your Global Background Screening Administrator username and password.
2. Click the **Setup** menu. Your configuration options will be listed on your screen.
3. Click the **Edit Status Values** option. The *Edit Status Values* screen will open.
4. Review the **Logical Values** set for the eight requirement status **Descriptions** available in the system. Your mappings should match those shown here. If they do not, click the **Logical Value** drop-down list and select any of the three available options to make a change.
5. Click the **Submit Pass\Fail\Pending Changes** button to save your changes.
6. *Edit Screening Requirements* using the procedure on page 22.








## Create New Status Description

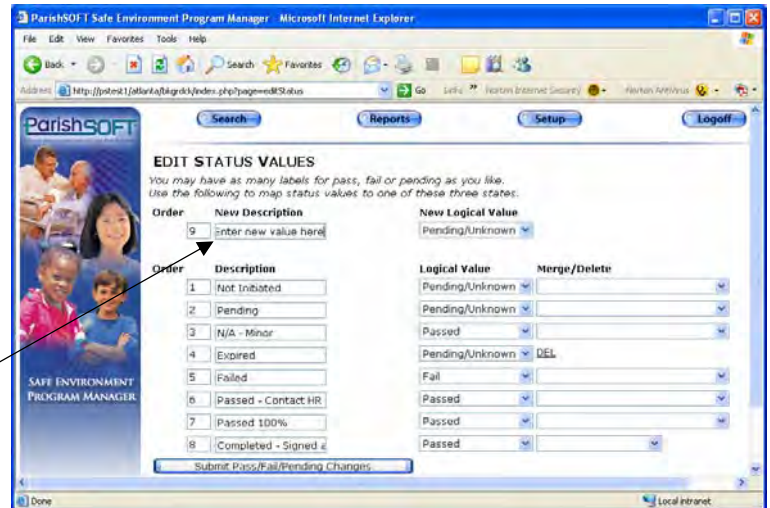
You can add status descriptions to your system if desired. For example, if your diocese requires FBI checks for members who have lived out of state, you could create a new Status Description called **N/A – Exempt** with a Logical Value set to **Passed** to clear members who live in-state and are exempt from this screening.

1. Click in the **New Description** field and type your status description. Press your **<Tab>** key.
2. Choose either *Passed*, *Pending/Unknown*, or *Fail* from the drop-down list to establish the logical value for the status description. This action maps the status description to one of the logical status values.
3. Click the **Submit** button to save.

### Status Mapping

Status value mapping (in step #2 above) determines whether the symbol , , or  is associated with a particular status. As a Global Administrator, you decide how each status will display to other users in your diocese who are relying on the SEP Manager data to make informed decisions about staffing and volunteers.

For example, if you create a new status description called **N/A – Exempt**, you could decide to assign a logical value of either **Passed** or **Pending/Unknown**. If you choose **Passed**, this requirement would display the green checkmark  when a screening requirement is set to the **N/A – Exempt** status. If you choose **Pending/Unknown**, this requirement would display the Pending question mark .



### Status Descriptions

The status descriptions that ParishSOFT provides are listed below.

**Not Initiated.** Screening has not yet begun.

**Pending.** Status of screening requirement is neither passed nor fail.

**N/A - Minor.** Person is under the age of 18 and is not subject to screening.

**Expired.** Prior screening is no longer valid; new screening is needed.

**Failed.** Person has failed the screening requirement.

**Passed – Contact HR.** Person has passed screening requirement; further action needed by Human Resources.

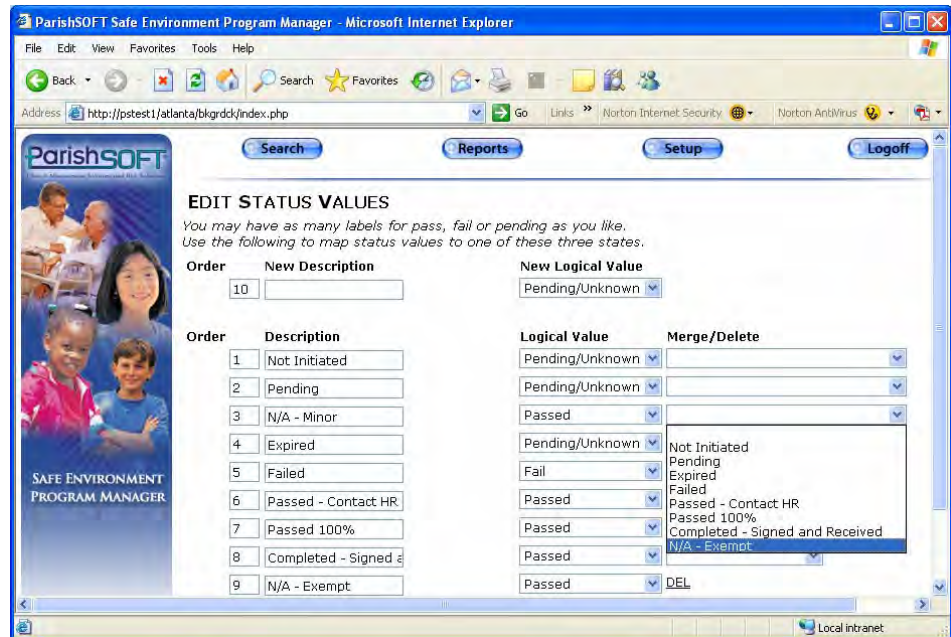
**Passed 100%.** Person has passed the screening requirement; no further action is needed at this time.

**Completed – Signed and Received.** Person has submitted a required signed document.

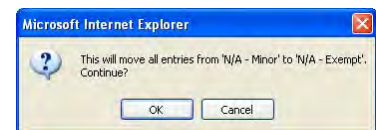
## Merge/Delete Status Values

You can merge status values within the SEP Manager...even when those status values have already been assigned to screening results in your system.

1. Find the **Description** of the status value that you wish to remove from your SEP Manager.
2. In the same row, choose the **Merge/Delete status value** from the lookup table—records will be merged into the status value that you select here.



3. Click **OK** to proceed with the merge. ParishSOFT will transfer the records from the old status value to the Merge status value. The old status value will be deleted.



## Delete Status Values

You can delete a status value only if it has not been assigned to any person's background screening record. Status values that can be deleted will display a DEL below the Merge/Delete column header.


## Edit Screening Requirements


Use this procedure to create the background screening requirements (*fingerprinting, coaches' certification, etc.*) that your staff and volunteers will need to pass before serving in a position. Enter all possible requirements for all possible risk categories/position types—you will map specific requirements to categories later in your setup process (see *Choose Requirements for Categories*, page 25).

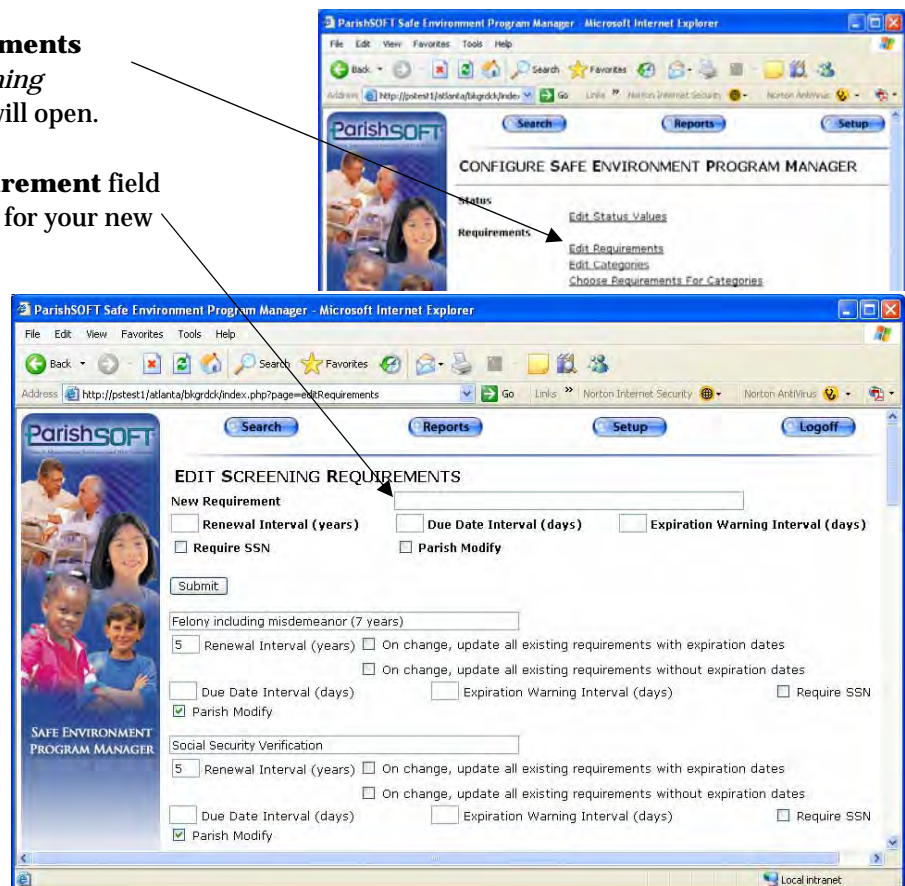
### Add New Requirement

You must be logged in to your secure website using your Global Background Screening Administrator username and password to complete this procedure.

1. From your secure SEP Manager website, click the **Setup** menu.
2. Click the **Edit Requirements** option. Your *Edit Screening Requirements* window will open.
3. Click in the **New Requirement** field and type the description for your new requirement.
4. If the requirement will need to be renewed, specify the **Renewal Interval (years)**. When a person completes a requirement that has a Renewal Interval, the **Expire Date** in the screening details will calculate based on the **Completed Date** plus the number of years specified in the **Renewal Interval (years)** field. SEP Manager will then

automatically flag a requirement with the  icon when it reaches the **Expire Date** or the **Expiration Warning Interval** period (if set).

5. Specify the **Due Date Interval (days)**. SEP Manager will add the **Due Date Interval** value to the **Application Date** to automatically calculate the requirement's **Due Date**.
6. If you have set a **Renewal Interval**, you can also set the **Expiration Warning Interval (days)** to trigger the  icon to display *n* days prior to the **Expiration Date**.
7. Check the **Require SSN** box if a social security number is required.
8. If you would like to let Organization Administrators change a requirement



The top screenshot shows the ParishSOFT Safe Environment Program Manager interface. The main heading is "CONFIGURE SAFE ENVIRONMENT PROGRAM MANAGER". There are navigation buttons for "Search", "Reports", and "Setup". A "Requirements" link is highlighted in the left sidebar. The main content area has a "New Requirement" field and several checkboxes: "Renewal Interval (years)", "Due Date Interval (days)", "Expiration Warning Interval (days)", and "Require SSN".

The bottom screenshot shows the "EDIT SCREENING REQUIREMENTS" page. It has a "New Requirement" field and a "Submit" button. Below the "Submit" button, there are two sections: "Felony including misdemeanor (7 years)" and "Social Security Verification". Each section has a "Renewal Interval (years)" field (set to 5), a "Due Date Interval (days)" field, an "Expiration Warning Interval (days)" field, and a "Require SSN" checkbox. There are also checkboxes for "On change, update all existing requirements with expiration dates" and "On change, update all existing requirements without expiration dates".

status (e.g., from a parish office), check the **Parish Modify** box.

9. Click **Submit** (at the bottom of the window) to save. Continue the Global Administrator Setup Process with the *Edit Categories* procedure on the following page.

### Update Renewal Years in an Existing Requirement

When you update an existing requirement, you can use the **On Change...** boxes to specify whether the change should retroactively update existing background screening records with expiration dates, those without expiration dates, all, or new requests only.

### Update New Screening Requests Only

To apply the change just to those screening requests created henceforth (i.e., to “grandfather in” all existing requirements to the prior settings), leave both **On change...** boxes unchecked.

This setting applies the new requirement expiration date only to new screening requests created from this date forward.

### Update All Existing Screening Results

To apply the new settings retroactively to all existing background screening records and all new screening requests, check both **On change...** boxes.

### Update Existing Screening Results Based on Expiration Dates

Check just the **On Change, update all existing requirements with expiration dates** box to update just those records and leave records without expiration dates as is.

Check just the **On Change, update all existing requirements without expiration dates** box to update just those records and leave records with existing expiration dates unchanged.

### Remove a Requirement

See *Choose Requirements for Categories*, page 25.

## Edit Categories

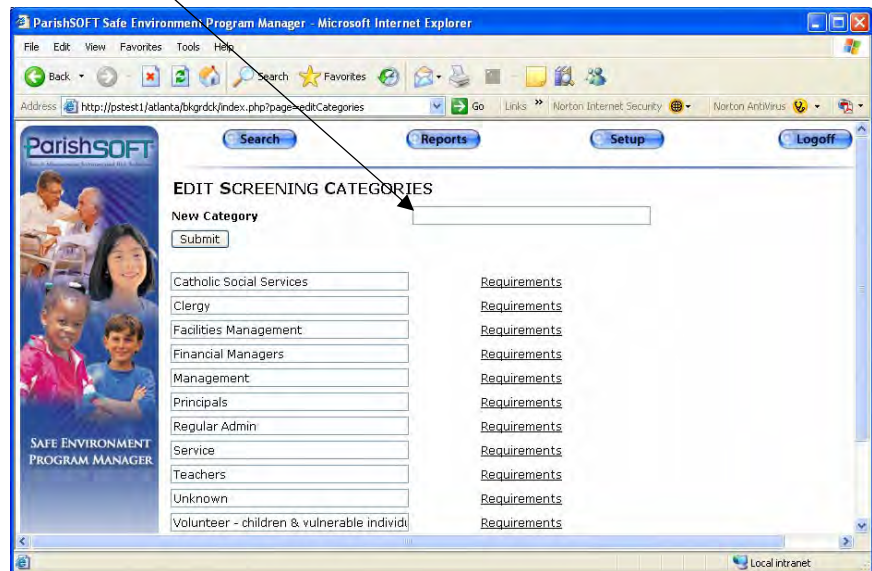
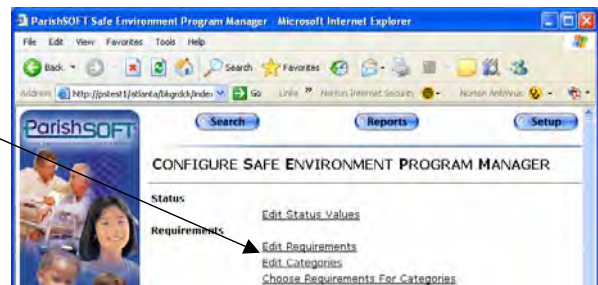
Use this procedure to create or edit risk categories for your position types. The SEP Manager uses categories to simplify the process of assigning requirements to the hundred or more position types typically found in diocesan organizations. You must be logged in to your secure website using your Global Background Screening Administrator username and password to edit categories.

1. From your secure SEP Manager website, click the **Setup** menu.
2. Click the **Edit Categories** option. Your *Edit Screening Categories* window will open.
3. To create a new risk category, click in the **New Category** field at the top of your screen and type the new category's description.
4. Click **Submit** to save.
5. Continue the Global Administrator Setup Process with the *Choose Requirements for Categories* procedure on the following page (or click the **Requirements** link to the right of each category to assign or view requirements).

## Edit a Category Description

To edit the description of any category, simply click in the category description and change the text as needed. Click the **Submit** button to save.

Your system lets you delete only those categories that are not associated with an actual screening. To remove a screening category, click on the **DEL** option to the right of the category.





## Choose Requirements for Categories

Use this procedure to choose the background screening requirements that a person must pass in order to serve in a particular role in the diocese (i.e., screening category). For example, a high risk category position type (e.g., *Youth Minister*), could require fingerprinting, criminal background check, protecting youth workshop, etc.

SEP Manager uses **categories** to simplify the process of assigning requirements to the hundred or more position types typically found in diocesan organizations. Rather than setting requirements for 125+ separate position types, you set requirements for just the risk categories; then assign one category to each position. You must be logged in to your secure website as a Global Background Screening Administrator to choose requirements.

this risk category at any organization in your diocese.

- Click the **Submit** button.
- Choose Categories for Positions* using the procedure on the following page.

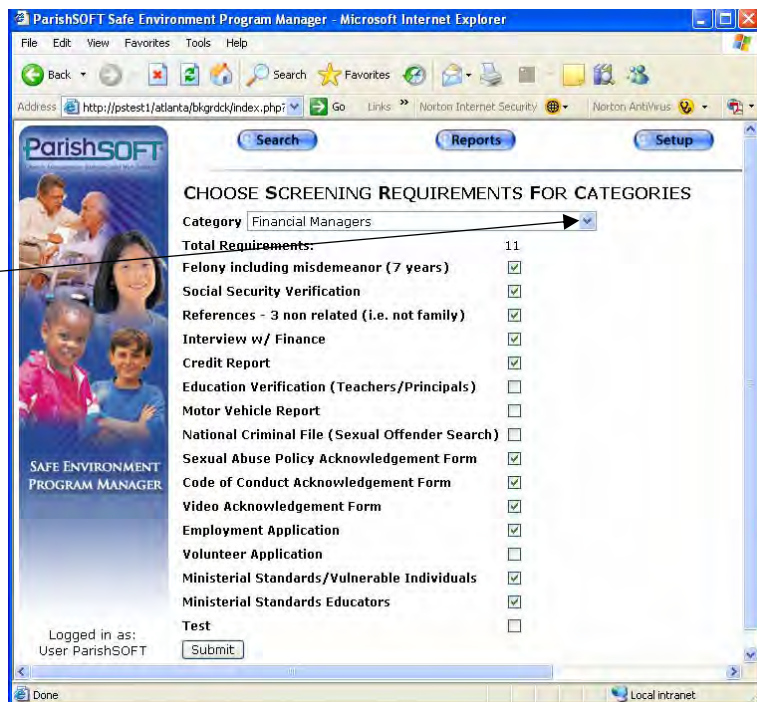
- From your secure SEP Manager website, click the **Setup** menu.



- Click the **Choose Requirements for Categories** option. Your *Choose Screening Requirements for Categories* screen will open.

- Select a **Category** from the lookup table at the top of your screen.

- Check the box of each requirement needed for all position types belonging to the selected category. The selections that you make here will determine which requirements must be passed when a person is assigned a position within



## Choose Categories for Positions

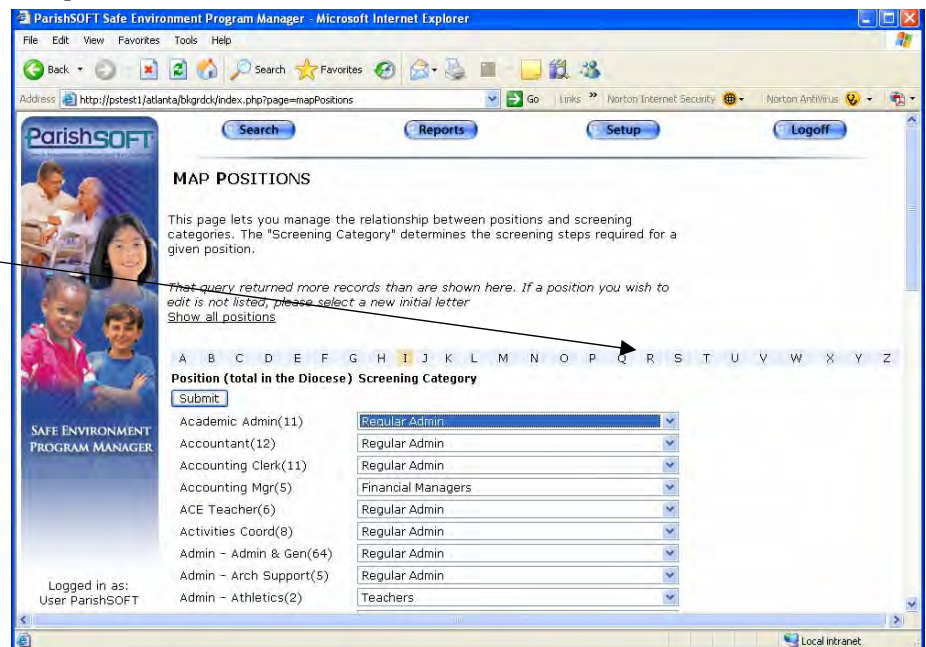
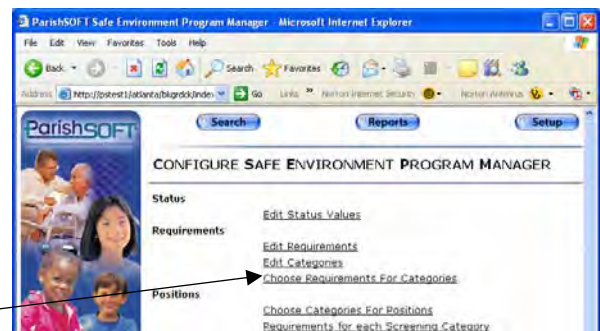
Use this procedure to map the position types established by your Diocesan Administrator to the risk categories that you have created for your background screening process.

For example, positions like *Deacon*, *Youth Minister*, and *DRE* would map to the **High** risk category in your SEP Manager. Positions like *Altar & Rosary*, *Cafeteria* would map to the **Low** risk category. When any organization creates a staff assignment for one of those position types, each of those persons will have a screening request placed in the SEP Manager for the requirements associated with the position type's risk category.

You must be logged in to your secure website as a Global Background Screening Administrator to choose categories for positions.

1. From your secure SEP Manager website, click the **Setup** menu.
2. Click the **Choose Categories for Positions** option. Your *Map Positions* screen will open.
3. **Associate every position in your diocese with a Screening Category:** choose a category from the lookup table available for each position type.
4. Click the **Submit** button to save your changes after every few updates.
5. When finished assigning screening

categories to positions, *Review Requirements for Each Screening Category* using the procedure on the following page.

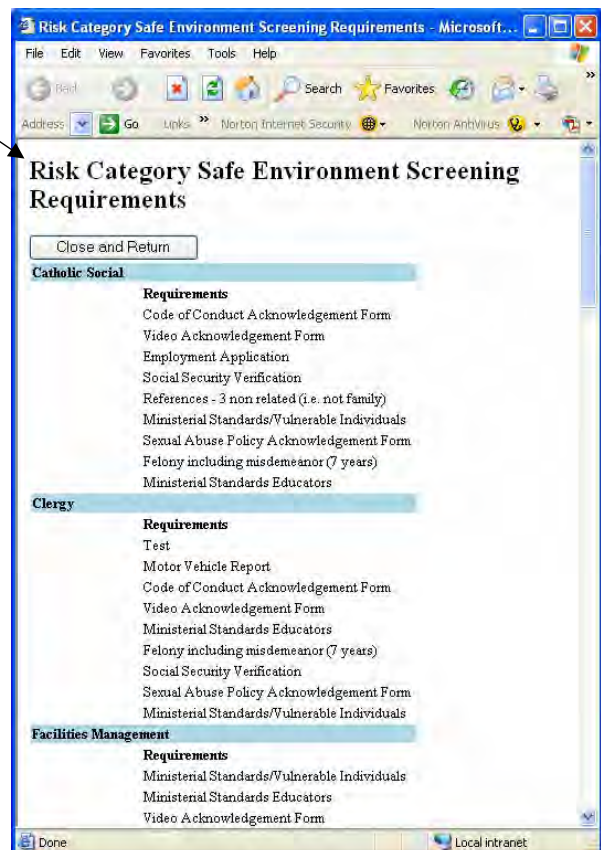


## Review Requirements for Each Screening Category

Use this procedure as a checkpoint to view and report on the requirements that have been established for each risk category in your system. Ensure that the requirements adhere to the background screening policies set forth by your diocese.

You must be logged in to your secure website as a Global Background Screening Administrator to view this report.

1. From your secure SEP Manager website, click the **Setup** menu.
2. Click the **Requirements for Each Screening Category** option. Your *Risk Category Safe Environment Screening Requirements* window will open.
3. To print a copy of this report, click the **File** menu > **Print**. Select your printer and click the **Print** button.
4. Review the requirements in place for each risk category to ensure that the screening configuration addresses your diocesan background screening policies. Edit any category requirements as needed.
5. Complete the *Manage Background Screening Administrators* procedure on the following page to grant administrator privileges to any other people within the diocese who need access to your secure website.



## Manage Background Screening Administrators

Your need to grant administrator privileges will depend upon how your diocese runs its internal diocesan safe environment program. If screening will be managed from a central office at the diocese, you may give Global Administrator rights just to the appropriate diocesan staff in that organization. If your diocese wants individual parishes to track and update the screening progress of individuals in their own organizations, then you will want to grant Organization Administrator rights to at least one or two staff members in each parish.

Use this procedure to grant administrator rights to a person with an existing assignment in the diocesan database or to determine who has Global or Organization Administrator rights to your SEP Manager data.

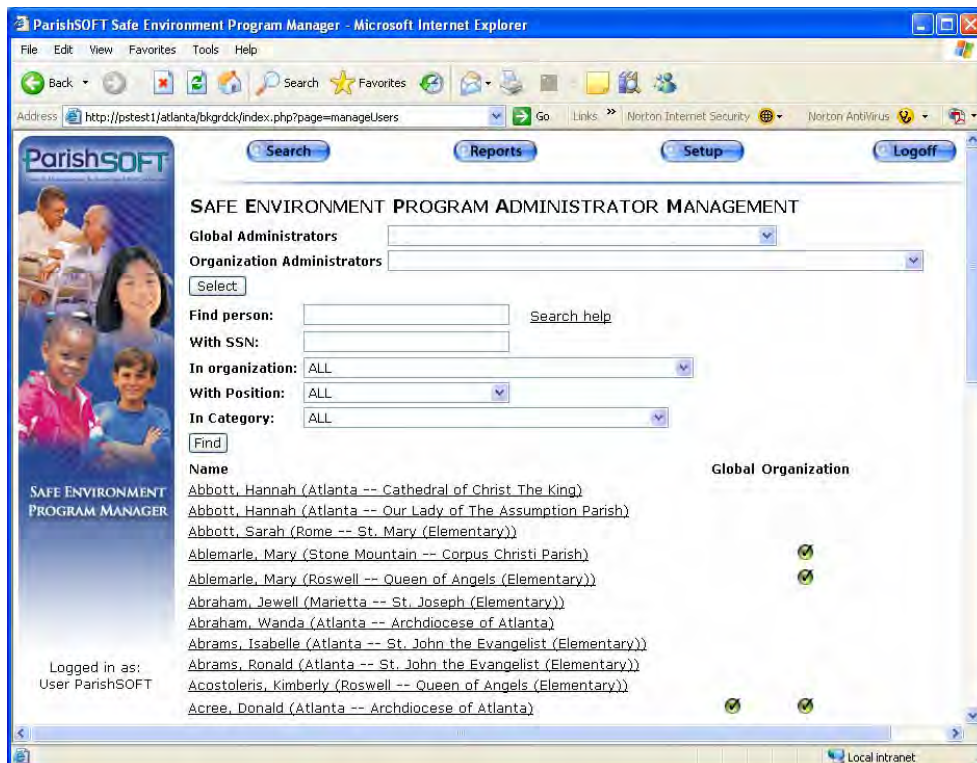
## Assign/Edit Administrator Privileges

You must be logged in to your secure website as a Global Background Screening Administrator to use the tools for managing background screening administrators.

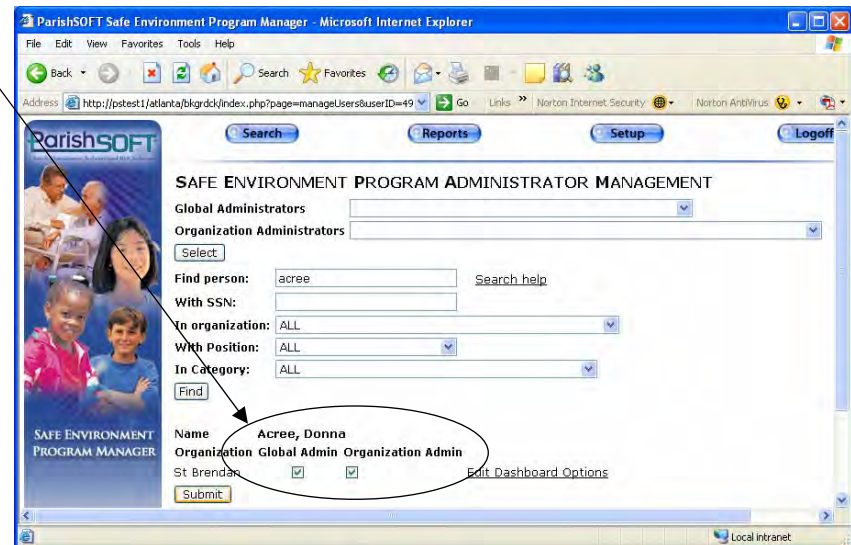
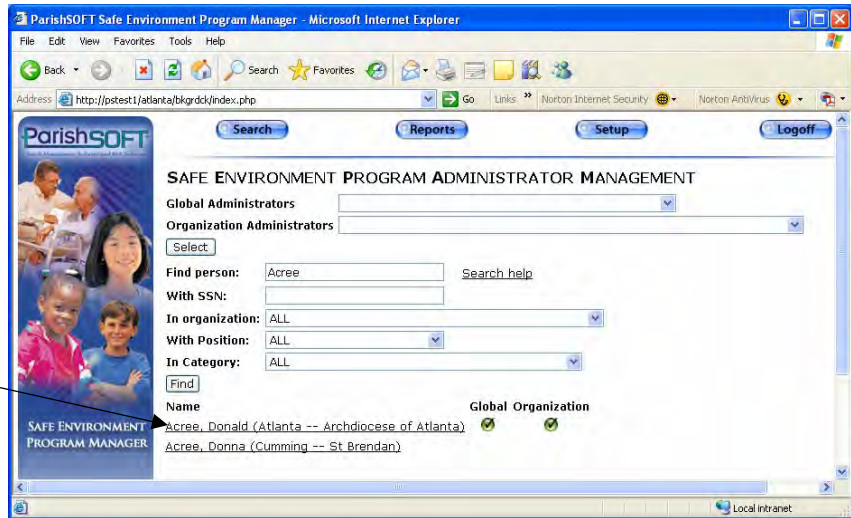
1. From your secure SEP Manager website, click the **Setup** menu.



2. Click **Manage Background Screening Administrators**. Your *Safe Environment Program Administrator Management* window will open.



3. Enter the last name of the person and click the **Find** button. Names matching your search criteria will display at the bottom of your screen.
4. Click the name of the person you wish to make an administrator (e.g., Acree, Donna).
5. Check the box appropriate for the administration privilege level you wish to grant. If you check **Global Admin**, the **Organization Admin** box will also be checked by default—global privileges include administrator privileges to all diocesan organizations. To remove an administrator privilege, uncheck the box.
6. Click the **Submit** button.
7. Repeat as needed. Once you have created the administrators you need, your SEP Manager is ready to use.

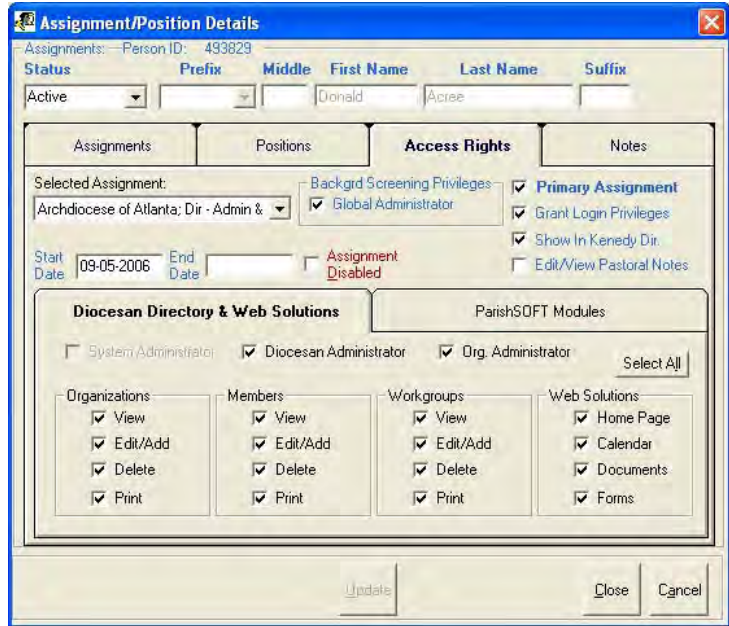


An administrator must have a valid username and password, login privileges, and permission to view, edit, and add member details in the Diocesan Directory database to log in to the SEP Manager.

## Assign Global Administrator Privileges from the Diocesan Directory

Diocesan Directory administrators can grant Global Administrator privileges to persons from the *Assignment/Position Details* window in the Diocesan Directory software.

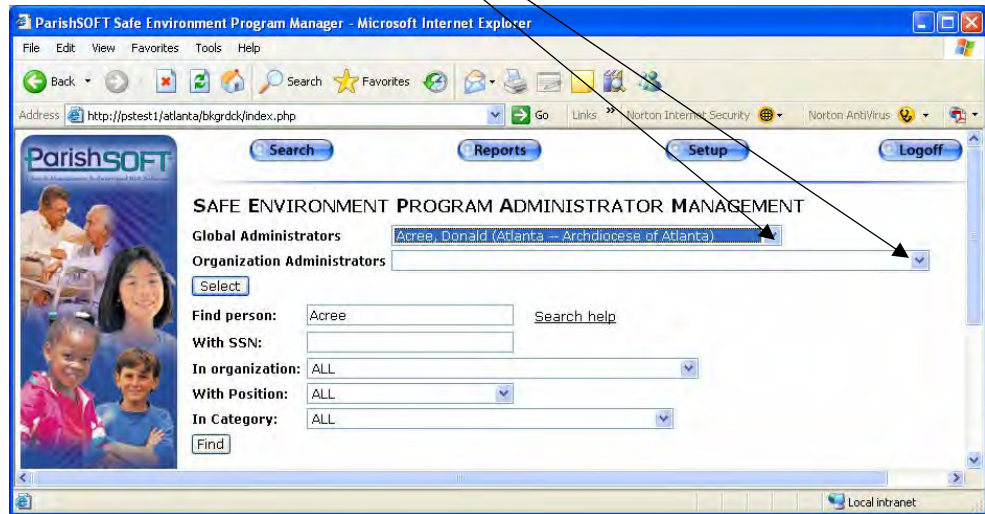
Each Global Administrator assignment created **from the Diocesan Directory** program requires a unique password, available from ParishSOFT support at (866) 930-4774.



## Who Are My Administrators?

To see which people have administrator access, click the arrow to the right of the **Global Administrators** or **Organization Administrators** fields at the top of your *Safe Environment Program Administrator Management* window.

Each administrator is listed in this field, along with the organization in which he or she is assigned.



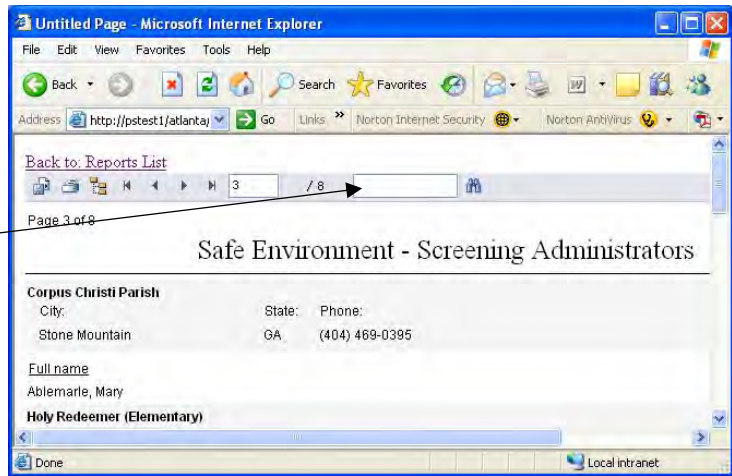
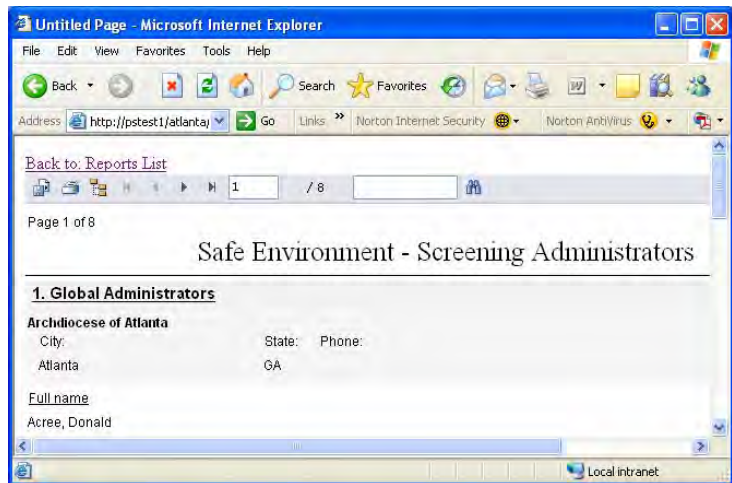
## Run Screening Administrators Report

You can also create a report that lists the administrators in your SEP Manager website. You must be logged in to your secure website as a Global Background Screening Administrator to run the Screening Administrators report.

1. From your secure SEP Manager website, click the **Setup** menu.
2. Click the **Reports** menu, then click the **Screening Administrators** option.
3. Click the **Preview Report** button.

Your report will display. Global Administrators will be listed first, followed by parish (i.e., organization) administrators.

The search field (located to the left of the binoculars icon) lets you find specific person or organization names quickly. Just type your criteria and click the binoculars icon—your results will display highlighted in orange.



## System Security

ParishSOFT recommends you employ Secure Socket Layer (SSL) technology or a firewall to encrypt data sent between Internet browsers and your SEP Manager server. Access to your SEP Manager website requires a valid user login, as well as a separate administrator privilege, which can be assigned only by a privileged Diocesan Directory Administrator.

ParishSOFT gives Diocesan Administrators the tools to maintain a system that permits access and protects sensitive information where needed. Any given user will have only those rights that the administrator chooses to grant. For the security of your system, we recommend the following practices:

- Grant only the privileges that are required—not every member needs a login; not everyone is an administrator.
- Give *Edit/Add* rights only to those responsible for managing the organizations and members in the database.
- **Require users to change their passwords from the default of *pass***; or change user passwords from the default before you give login information to your background screening administrators. Safeguard all passwords.
- Logoff or place your computer in hibernate mode when you leave your Diocesan Directory or SEP Manager applications unattended. From the Web, simply close your Web browser.
- Disable privileges for anyone who leaves the diocese or organization.
- Never share logins.



## Manage External Agencies

The External Agency Manager lets you enter the names of agencies used for background screening directly into the SEP Manager. When administrators update individual requirements, they will be able to choose the external agency name from the **Agency** lookup table found in the position details window.

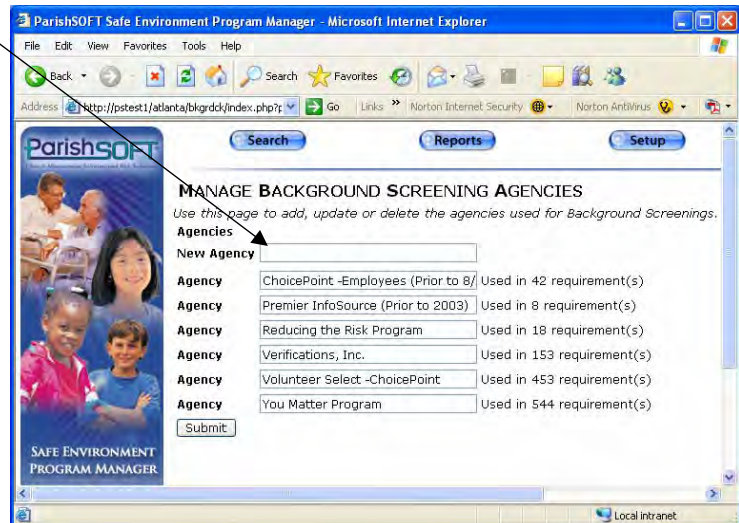
You must be logged in to your secure website as a Global Background Screening Administrator to update external agencies.

1. From your secure SEP Manager's **Setup** menu, click **Manage External Agencies**.
2. To add an agency, just type the **New Agency** name.
3. Click **Submit**.



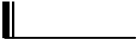
## Specify External Agency in Requirement Details

You can record the agency name with the results of a particular screening requirement. Just open the requirement details and choose the applicable **Agency** from the lookup table. Click **Submit** to save.



## Delete an External Agency

An agency can be deleted only if it has not been associated with any screening requirements. To delete an agency, check the **Delete** box and click the **Submit** button.



{Intentionally Blank}

*CHAPTER 3*

---

*USCCB OPTIONS FOR  
GLOBAL ADMINISTRATORS*

## Manage USCCB Group List

Use the USCCB Group List Manager tool to simplify demographic reporting from your SEP Manager database to the USCCB. This process involves four steps: 1.) **Configure USCCB List** to create groupings; 2.) **Configure USCCB Positions** to map those groupings to specific positions in the diocese; 3.) **Set Up Audit Requirements** to specify which requirements should be included on the audit report; and 4.) **Configure USCCB Audit** to report demographics to the USCCB.

You must be logged in to your secure website as a Global Background Screening Administrator to manage USCCB options.



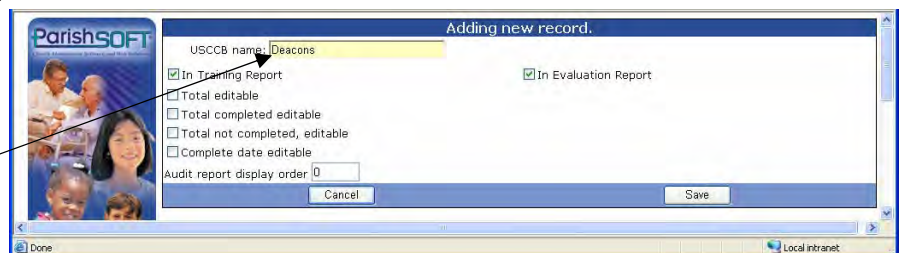
### 1. Configure USCCB List

1. From your SEP Manager's **Setup** menu, click **Configure USCCB List**.



2. To add a new group, click **Add New Record**.

3. Type the group name in the **USCCB name** field.



4. Check options and specify **Audit report display order** as needed.

5. Click **Save**.

a box unchecked to prevent a field from displaying on the audit report. Checkboxes are set individually for each USCCB group and include:

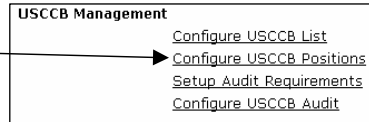
### USCCB List Options

Each checkbox, when checked, makes the named field visible and, where indicated in the checkbox name, editable on the USCCB training and evaluation audit reports; leave

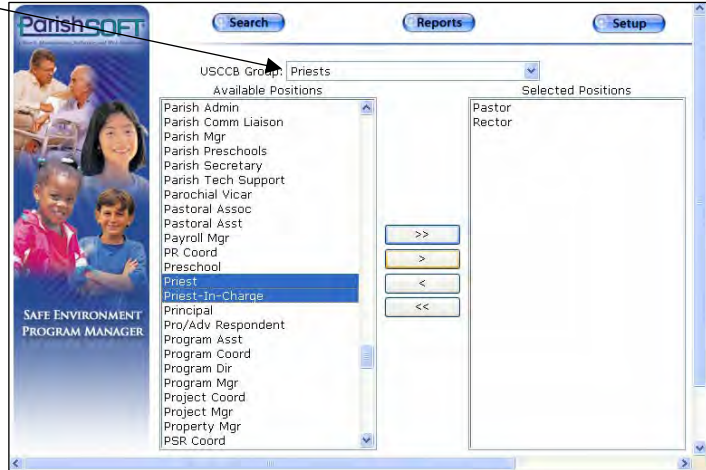
- In Training Report
- In Evaluation Report
- Total editable
- Total completed editable
- Total not completed, editable
- Complete date editable.

## 2. Configure USCCB Positions

1. From your SEP Manager's **Setup** menu, click **Configure USCCB Positions**.



2. Select a **USCCB Group** from the list at the top of the screen. All USCCB Groups that have been added to your database will display here.






3. Click the **Available Position(s)** that should map to the selected **USCCB Group**. To select multiple positions, press and hold your **<Ctrl>** key while you click.

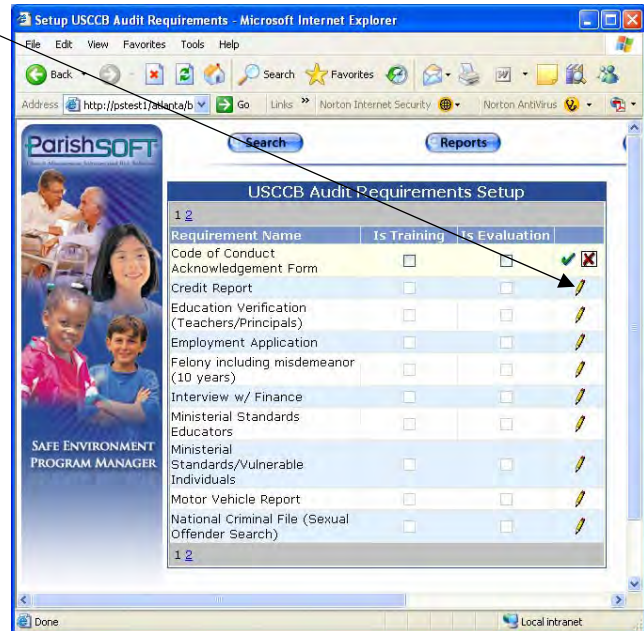
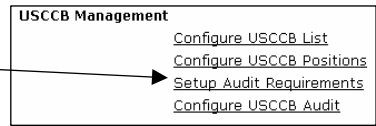
4. Click the **>** button to map the positions to the selected group.

The four arrow buttons on this screen can be used as listed below:

- >> Map all positions to group
- > Map just the selected position(s) to group
- < Remove just the selected position(s) from group
- << Remove all positions from group

### 3. Set Up Audit Requirements

1. From your SEP Manager's **Setup** menu, click **Setup Audit Requirements**.
2. The window will open in read-only mode. To activate the edit mode, click the pencil icon .
3. Check the **Is Training** box and/or the **Is Evaluation** box for each requirement in the list to indicate which requirements will be included in the training and evaluation sections of the USCCB audit report. Leave a requirement unchecked to omit from the USCCB audit report.
4. Click the green checkmark  to save – you must save each line to preserve your changes.
5. Click the pencil icon  in the next requirement and repeat steps 3–4. If your requirements list spans multiple pages, click the link for the next page number at the bottom of the window.




## 4. Configure USCCB Audit

1. From your SEP Manager's **Setup** menu, click **Configure USCCB Audit**.
2. Choose the **Report Type** (Training or Evaluation) from the lookup table.
3. Enter your name in the **Responsible Employee** field.
4. Click the calendar icon to select the **Audit Period Start and End Dates**.
5. Click the calendar icon in the **Date Audit Conducted** field and select the audit date.
6. Edit the **Revision** field as needed.

USCCB Management

- [Configure USCCB List](#)
- [Configure USCCB Positions](#)
- [Setup Audit Requirements](#)
- [Configure USCCB Audit](#)

7. Review the data for each group. Enter the actual values in the white boxes below the  icon—these boxes are the data entry fields for the current year. If a variance exists between the system's values and the actual values that you enter, the differences can be documented in the **Variance** field.
8. Enter the **Name of Program**.

2007 Compliance Audit - Chart D

Group	Estimated Total Number	Estimated Number Trained	Estimated Number Remaining to be Trained	Date Scheduled for Completion of Training	Name of Program
Priests	0 0 6	0 0 6	0 0 0	09/15/2007	Safe Environment Program
Deacons	0 0 16	0 0 15	0 0 1	09/15/2007	Safe Environment Program
Teachers	0 0 35	0 0 30	0 0 5	08/15/2007	Safe Environment Program

Variance

Logged in as: User ParishSOFT

9. Answer the USCCB Audit questions in the lower-half of your window:

- a. Choose either **Yes** or **No** to each of the questions.
- b. Provide an **Explanation** for any questions to which you answer **No**.
- c. When complete, click the **Save Data** button.

10. Run the Compliance Audit Report (see page 60).

Questions		
Question	Answer	Explanation
1a) Does the diocese/eparchy have the curricula and materials to verify that safe environment programs exist for each of the various groups set forth in Article 12?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
1b) Does that documentation include an official letter from the diocese/eparchy promulgating the programs(s)?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
2) Does the diocese/eparchy have verification that this training is on-going by having the number of times and places where safe environment training occurred during the audit year?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
3) Does the diocese/eparchy have a calendar of training scheduled through December 31,2006?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
4) Does the diocese/eparchy have letters signed by each pastor that the parish has received the required safe environment programs and has implemented them?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Letters signed by 18 of 20 pastors in the diocese. Two remaining signatures
5) Does the diocese/eparchy have estimates of how		



*CHAPTER 4*

---

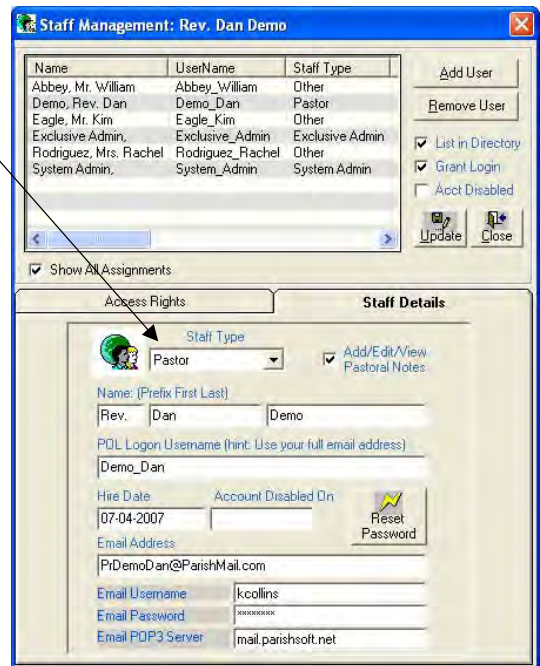
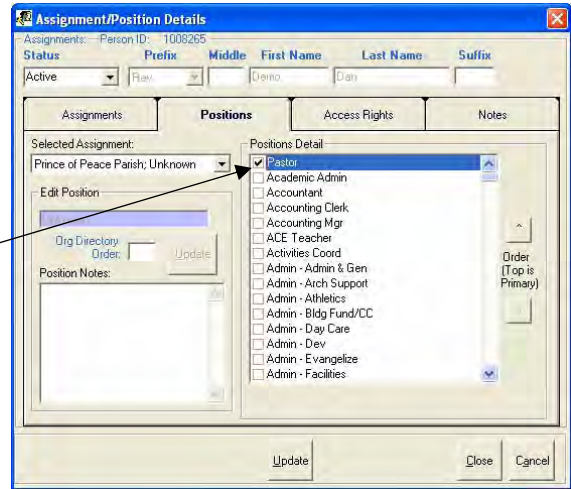
*SEP MANAGEMENT  
IN YOUR DIOCESE*

## Request New Screening

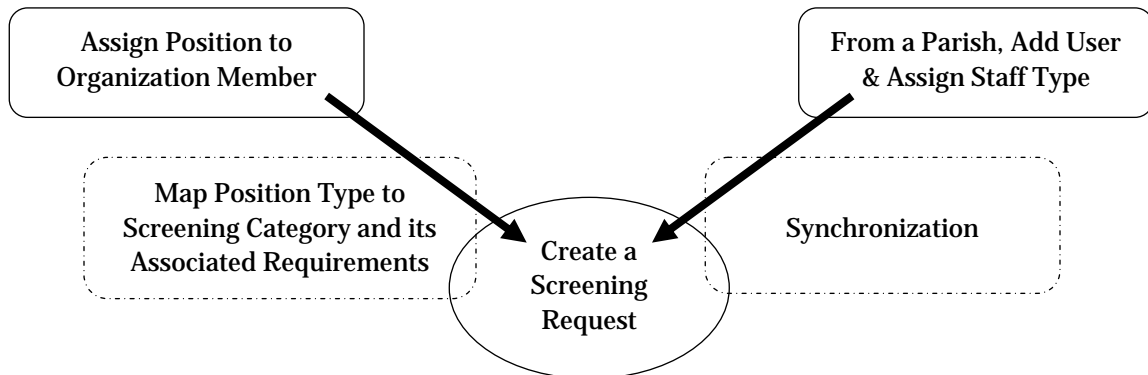
A screening request is automatically created in the SEP Manager any time a person is added to an organization in the diocese, provided the **Position Type** is specified.

Add a person to an organization from either the Diocesan Directory or from the parish Family Directory program.

- **From Diocesan Directory**—Add a member to an organization, specifying a **Position**.
- **From a parish**—Use the Family Directory Module to add a user with a **Staff Type**. (Click **Staff** menu > **Manage Staff List**.) Add the social security number to the member details. When synchronization occurs with the diocese, the SEP Manager will map the parish **Staff Type** (i.e., same as the diocesan **Position Type**) to the appropriate screening risk category.



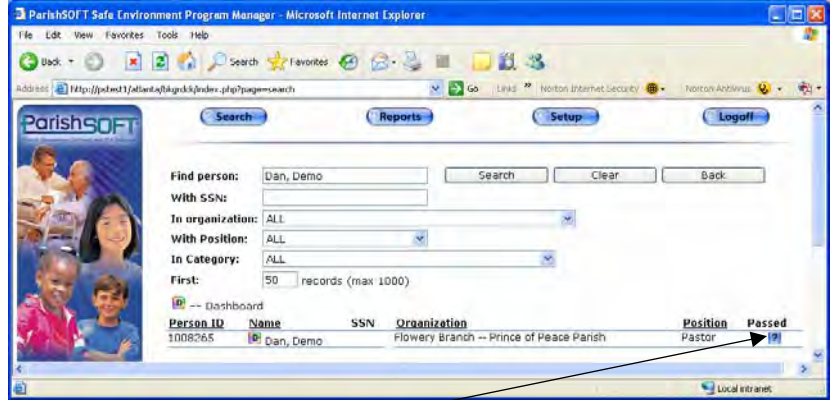
Either method of adding a person to an organization or staff list creates a screening request. SEP Manager maps the parish **Staff Type** or diocesan **Position** (i.e., **Position Type**) to its appropriate background screening risk category. When you view the person's screening status from the SEP Manager website, each requirement needed for the position will be listed with the person's name and assignment.



## Confirm the Successful Screening Request

Once you add a new person and specify a position type, SEP Manager automatically creates the screening request.

In this example, we have just added Demo Dan as Pastor of Prince of Peace Parish.



When we search for his name in the SEP Manager, his screening request displays a summary status of **pending** for all requirements. All new screening requests will display a *pending* status until an administrator updates the screening details for each requirement. Other statuses include *passed* , *failed* , or *expired* .



Click the Dashboard icon to see which specific requirements he person needs to complete.

Note that you cannot edit screening details from the dashboard view – to edit screening details, click the person’s name.

## Search the SEP Manager





When you log in to view background screening results, records of the first 50 persons with **Positions** in the diocese will be displayed on the main window.

Use the search tools in the SEP Manager to locate specific people, staff, and organizations. Simply choose your category, specify your search criteria (**Clear** any other fields that have unwanted search criteria in them), and click the **Search** button. Searches are available for the following categories:

- **Find Person**—searches by last name
- **With SSN**—locates person by full or partial social security number
- **In Organization**—displays list of people with assignments in selected organization (e.g., list everyone assigned to *Catholic Youth Organization*)
- **With Position**—searches by position type (e.g., list all the *Pastors*)
- **In Category**—searches by screening risk category (e.g., list all *High* category assignments)

## Initial View of Screening Results

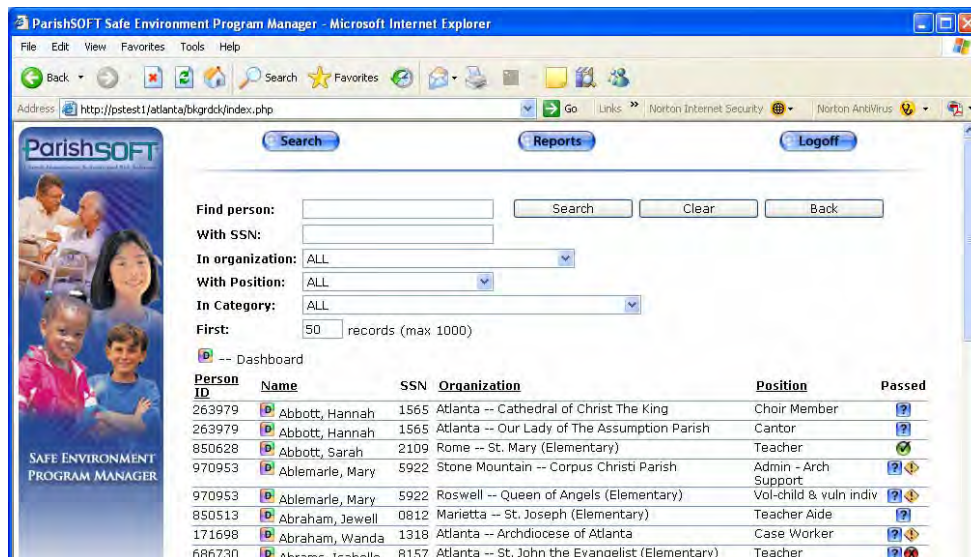
Once you find the name of the person, the summary status of pending, passed, or failed will indicate the aggregate status of all requirements for the position.

Logical Value	Symbol	How to Interpret Results
Passed		The person has passed every requirement needed.
Failed		The person has failed at least one requirement
Pending/Unknown		One or more requirements in process (not completed)
Expired		One or more requirements expired or nearing expiration

To update screening details from here, click the person's name. If you simply need to view the screening details to see the status of a specific requirement, click the dashboard icon (edits are not permitted from the dashboard view).

## Protection of Social Security Numbers

For security purposes, only the last four digits of a member's social security number will display on the summary screen.

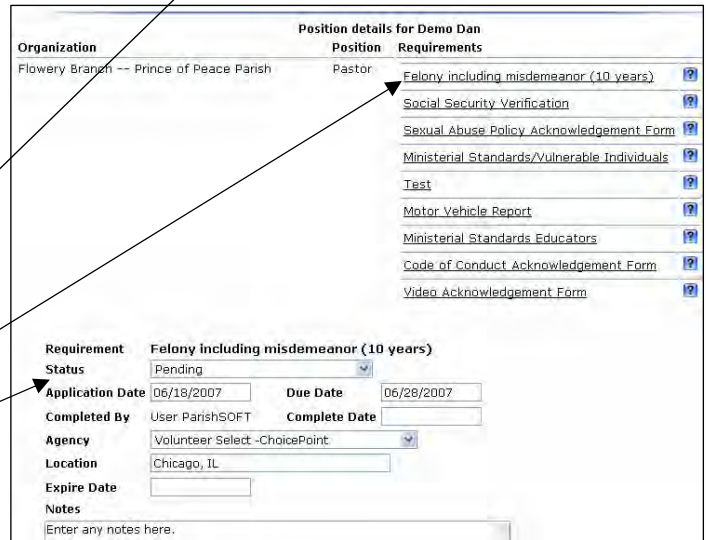
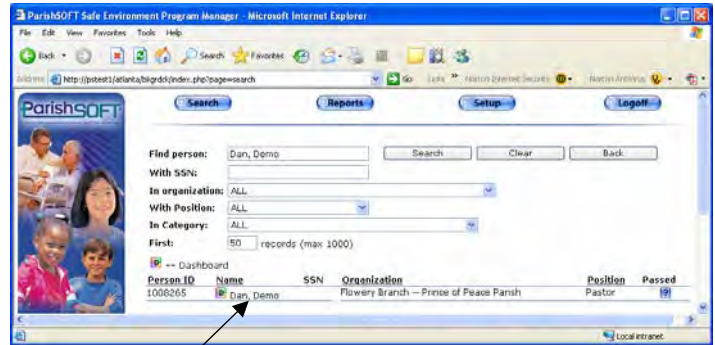


## Update Screening Details

Screening administrators can view the requirement details for everybody in the database. Organization Administrators can update screening statuses only for individuals who have assignments in the organizations which they administer. Global Administrators can update statuses for anybody in the diocese.

You can access SEP Manager from either the Diocesan Directory *Member* screen or directly from your SEP Manager website. You must be logged in as an Administrator to edit screening details.

1. **Search** to display the name of the person whose screening details you wish to update.
2. **Click on the name** of the person.
3. Click the requirement (e.g., **Felony including misdemeanor**) to open the detail view.
4. Set the **Status**. The **Complete Date** field will populate automatically with today's date. The **Expire Date** field will display a date only if the requirement has a *Renewal Interval* specified (renewal intervals are specified during the Global Administrator's initial setup).
5. Specify the **Application Date**, **Agency**, **Location**, and any **Notes**.
6. Click the **Submit** button to save your changes. **You must Submit to save changes between requirements.**
7. Click the next requirement, update the details as needed, and **Submit**.





**TIP:** Individual requirement symbols will change as you update statuses to Passed or Failed.




## Update Multiple Positions Sharing the Same Requirement

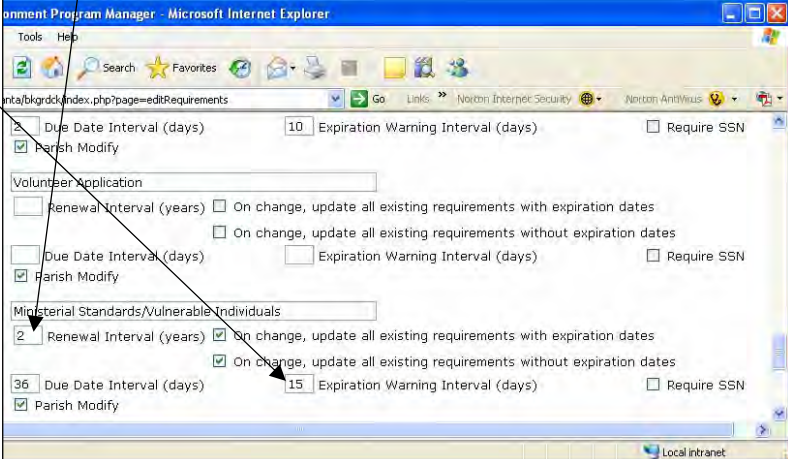
As always, the requirement results will apply where applicable to any other positions in which this person serves. For example, if Robert Jones were being screened to serve as *Coach* in three parishes, his failure of the *Fingerprinting* requirement would be shared with all three parishes. Only one screening is required; and the results need to be entered just once.

## Update an Expired Requirement

The caution  icon indicates when a background screening requirement has expired or is nearing its expiration date. The  icon will display alongside the Passed, Failed and Pending symbols that summarize completion status of aggregate screening requirements in your main SEP Manager window.

Global Administrators establish expiration dates when they create or update background screening requirements (see page 22). A given requirement will expire automatically only if your Global Administrator has set a value for the requirement's **Renewal Interval (years)** (see page 22 for details).

If the Global Administrator has also set an **Expiration Warning Interval** of *n* days, the SEP Manager will detect this date and flag the requirement with the  icon automatically, *n* number of days prior to the requirement's Expiration Date.



The screenshot shows a web browser window titled "onment Program Manager - Microsoft Internet Explorer". The address bar shows "inta/bkgrdd/index.php?page=editRequirements". The page contains several configuration sections:

- Volunteer Application:**
  - Due Date Interval (days): 10
  - Expiration Warning Interval (days): 10
  - Require SSN:
  - Parish Modify:
  - Renewal Interval (years):
  - On change, update all existing requirements with expiration dates:
  - On change, update all existing requirements without expiration dates:
- Ministerial Standards/Vulnerable Individuals:**
  - Due Date Interval (days): 2
  - Expiration Warning Interval (days):
  - Require SSN:
  - Parish Modify:
  - Renewal Interval (years): 2
  - On change, update all existing requirements with expiration dates:
  - On change, update all existing requirements without expiration dates:
- 36:**
  - Due Date Interval (days): 36
  - Expiration Warning Interval (days): 15
  - Require SSN:
  - Parish Modify:

Arrows from the text point to the "Renewal Interval (years)" field in the "Ministerial Standards/Vulnerable Individuals" section and the "Expiration Warning Interval (days)" field in the "36" section.

## Example Expired Requirement

The example screen below shows that Mary Ablemarle needs to renew one of the requirements for her position at Queen of Angels Elementary.

If we click on her name, we'll see that she needs to read and sign a new **Ministerial Standards/Vulnerable Individuals** policy.

Person ID	Name	SSN	Organization	Position	Passed
263979	Abbott, Hannah	1565	Atlanta -- Cathedral of Christ The King	Choir Member	
263979	Abbott, Hannah	1565	Atlanta -- Our Lady of The Assumption Parish	Cantor	
850628	Abbott, Sarah	2109	Rome -- St. Mary (Elementary)	Teacher	
970953	Ablemarle, Mary	5922	Stone Mountain -- Corpus Christi Parish	Admin - Arch Support	
970953	Ablemarle, Mary	5922	Roswell -- Queen of Angels (Elementary)	Vol-child & vuln indiv	

Once Mary reads and signs this document, an Organization or Global Administrator would then click on the **Ministerial Standards/Vulnerable Individuals** requirement, update her requirement completion details with a Passed status, new date, etc. Once the Complete Date is updated, the icon would then no longer display, and her status would then display as passed .

[Ministerial Standards/Vulnerable Individuals](#)

[Ministerial Standards Educators](#)

---

Requirement: **Ministerial Standards/Vulnerable Individuals**

Status: Completed - Signed and Received

Application Date:  Due Date:

Completed By: User ParishSOFT Complete Date:

Agency:

Location:

Expire Date:

Notes:

## Set Expired Status Manually

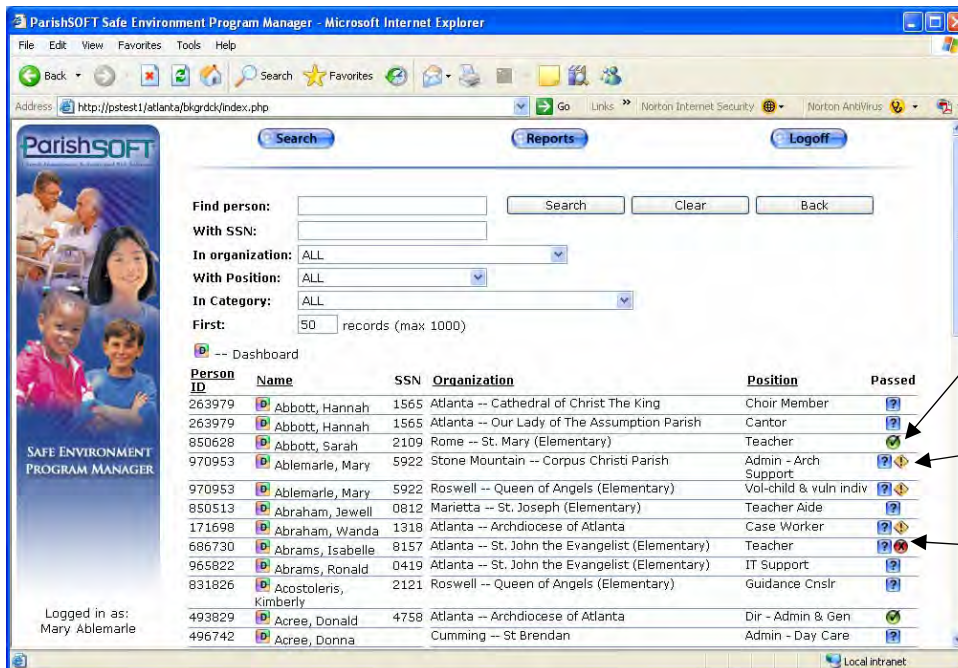
While the best practice is for the Global Background Screening Administrator to manage requirement expirations centrally so that all diocesan organizations use the same screening standards, it is possible to update the requirement details manually to force the icon to display in the SEP Manager. Just set the **Status** to Expired, set the **Expire Date**, and click **Submit**.

## Requirement Status Symbols

SEP Manager displays the summarized completion status of aggregate background screening requirements using the following symbols:

Logical Value	Symbol	How to Interpret Results
Passed		The person has passed every requirement needed.
Failed		The person has failed at least one requirement
Pending/Unknown		One or more requirements in process (not completed)
Expired		One or more requirements expired or nearing expiration

These same symbols are also used in the screening results detail view to identify clearly which requirements have been passed, failed, or are pending or expired.



The requirement status symbols summarize the aggregate screening results for you in a convenient list view.


In this example, Sarah Abbott has passed all screening requirements.

Mary Ablemarle has one expiring requirement.

Isabelle Abrams has failed at least one screening requirement.



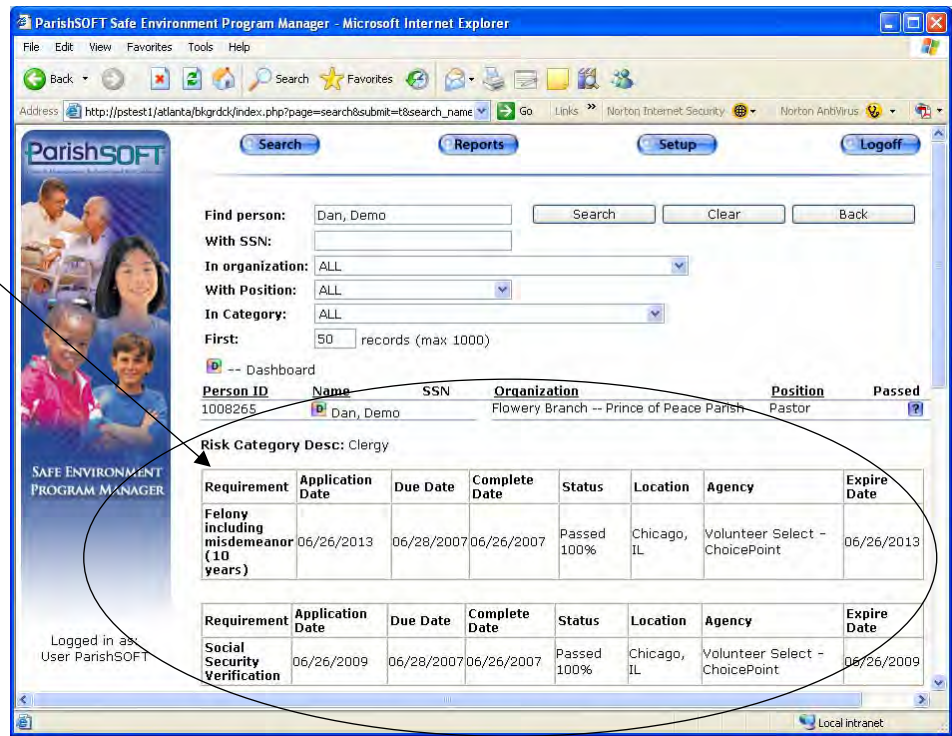
## About the Dashboard Display

The Dashboard view is a quick summary display of screening results. Open the Dashboard view by clicking the  icon. The system default dashboard is shown in the circled area below.

You can configure the Dashboard to show only background screening data you need (so that you don't have to view fields that are not relevant to you).

You can change the order in which requirements are displayed and the labels that identify the data within the dashboard.

Any custom settings that you apply to your dashboard will affect only your user login.



ParishSOFT Safe Environment Program Manager - Microsoft Internet Explorer

Address: http://ptest1/atlanta/bgdrck/index.php?page=search&submit=t&search\_name

Search Reports Setup Logoff

Find person: Dan, Demo Search Clear Back

With SSN:

In organization: ALL

With Position: ALL

In Category: ALL

First: 50 records (max 1000)

-- Dashboard

Person ID	Name	SSN	Organization	Position	Passed
1008265	Dan, Demo		Flowery Branch -- Prince of Peace Parish	Pastor	<input type="checkbox"/>

Risk Category Desc: Clergy

Requirement	Application Date	Due Date	Complete Date	Status	Location	Agency	Expire Date
Felony including misdemeanor (10 years)	06/26/2013	06/28/2007	06/26/2007	Passed 100%	Chicago, IL	Volunteer Select - ChoicePoint	06/26/2013
Social Security Verification	06/26/2009	06/28/2007	06/26/2007	Passed 100%	Chicago, IL	Volunteer Select - ChoicePoint	06/26/2009

Logged in as User ParishSOFT

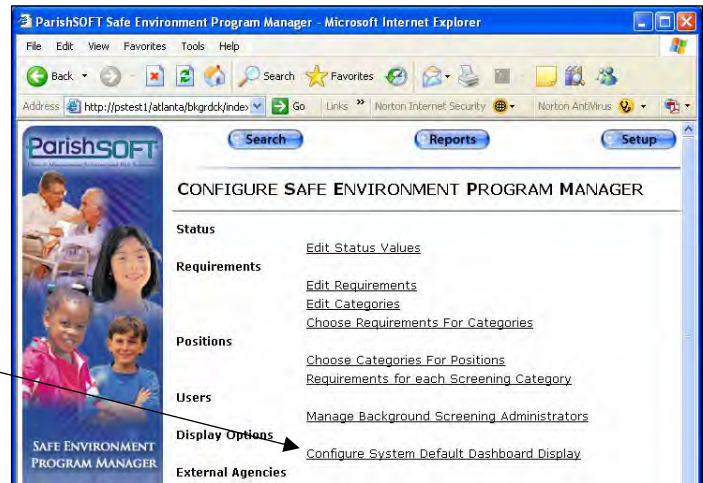
Local Intranet

## Customize Your Dashboard

The Dashboard itself is an option for users. Changes that you make to your personal Dashboard settings do not affect the settings of other users.

Choose your desired dashboard look using the following procedure.

1. From your SEP Manager's **Setup** menu, click **Configure System Default Dashboard Display**.
2. Set your **Dashboard** to **Enable** (the Disable option lets you opt out of having a dashboard view).
3. The **Screening Type Label** in your Dashboard will default to **Risk Category Desc.** If you wish to change this label, type the new text and click the **Change Dashboard Style** button to save your settings.
4. Show or hide a requirement or show/hide specific screening results for a particular requirement by toggling the **Show** checkboxes.
5. To change the order of how requirements display in the dashboard, click the **Change order** up and down arrows.



6. To change a text label for screening data (e.g., change “Expire Date” to “Renew Before”), type the new text in the **Label** field.
7. When finished configuring the Dashboard settings, click the **Change Requirement Masks** button. Click **Search** to view your new Dashboard settings.

Change Requirement Masks

**Requirements Display Settings**

**Social Security Verification**  Show    Change order:

Property	Show	Label
Application Date	<input type="checkbox"/>	<input type="text"/>
Due Date	<input type="checkbox"/>	<input type="text"/>
Complete Date	<input type="checkbox"/>	<input type="text"/>
Status	<input checked="" type="checkbox"/>	<input type="text"/>
Location	<input type="checkbox"/>	<input type="text"/>
Agency	<input type="checkbox"/>	<input type="text"/>
Expire Date	<input checked="" type="checkbox"/>	<input type="text" value="Renew Before"/>

**Felony including misdemeanor (10 years)**  Show    Change order:

Property	Show	Label
Application Date	<input type="checkbox"/>	<input type="text"/>
Due Date	<input type="checkbox"/>	<input type="text"/>
Complete Date	<input checked="" type="checkbox"/>	<input type="text"/>
Status	<input checked="" type="checkbox"/>	<input type="text"/>
Location	<input checked="" type="checkbox"/>	<input type="text"/>
Agency	<input checked="" type="checkbox"/>	<input type="text"/>
Expire Date	<input checked="" type="checkbox"/>	<input type="text" value="Renew Before"/>

In this example, we have changed the **Screening Type Label** (it now says “Screening Level” instead of “Risk Category Desc:”), given the **Expire Date** field a new label (i.e., “Renew Before”), hidden some fields within the **Felony** and **Social Security Verification** requirements, and changed the sort order so that the Social Security Verification details are listed at the top of the dashboard.

Our newly customized Dashboard now looks like this (compare with the system default Dashboard display as shown on page 49).

### Switch from Dashboard View to Complete Details View

Of course, you can still click the **person’s name** at any time to see the full screening results for any given requirement.

Search
Reports
Setup
Logoff

Find person:            

With SSN:

In organization: ALL

With Position: ALL

In Category: ALL

First:  records (max 1000)

-- Dashboard

Person ID	Name	SSN	Organization	Position	Passed
1018265	Dan, Demo		Flowery Branch -- Prince of Peace Parish	Pastor	<input style="font-size: 0.8em;" type="button" value="?"/>

**Screening Level:** Clergy

Requirement	Status
Social Security Verification	Passed 100%    06/26/2009

Requirement	Complete Date	Status	Location	Agency	Renew Before
Felony including misdemeanor (10 years)	06/26/2007	Passed 100%	Chicago, IL	Volunteer Select -ChoicePoint	06/26/2013

### Dashboard Icon Missing?

If you do not have a icon in your search results, change your Dashboard Display Option to **Enable** using step #2 on page 50.

## Requirements Display Settings

The Requirements Display Settings shown on this screen are available only when your Dashboard style is set to Enable.

The screenshot shows the 'Change Requirement Masks' interface. It features two sections for 'Social Security Verification' and 'Felony including misdemeanor (10 years)'. Each section has a 'Show' checkbox, a 'Change order' dropdown, and a table of properties with 'Show' checkboxes and 'Label' text boxes. Annotations explain the function of these elements.

Property	Show	Label
Application Date	<input type="checkbox"/>	
Due Date	<input type="checkbox"/>	
Complete Date	<input type="checkbox"/>	
Status	<input checked="" type="checkbox"/>	
Location	<input type="checkbox"/>	
Agency	<input type="checkbox"/>	
Expire Date	<input checked="" type="checkbox"/>	Renew Before

Property	Show	Label
Application Date	<input type="checkbox"/>	
Due Date	<input type="checkbox"/>	
Complete Date	<input checked="" type="checkbox"/>	
Status	<input checked="" type="checkbox"/>	
Location	<input checked="" type="checkbox"/>	
Agency	<input checked="" type="checkbox"/>	
Expire Date	<input checked="" type="checkbox"/>	Renew Before

**Annotations:**

- Check the **Show** box to display the requirement; uncheck a box to hide.
- Check the **Show** boxes to display individual requirement details in your Dashboard; uncheck to hide.
- Rename a field (just in your dashboard view) by typing text in the **Label** field. For example, **Expire Date** is called "**Renew Before**" in this user's dashboard.
- Click the **Arrows** to change the order of requirements in your dashboard.
- Click the **Change Requirement Masks** button to save your settings.

*APPENDIX A*

---

*SEP MANAGER REPORTS*

## Run Background Screening Reports

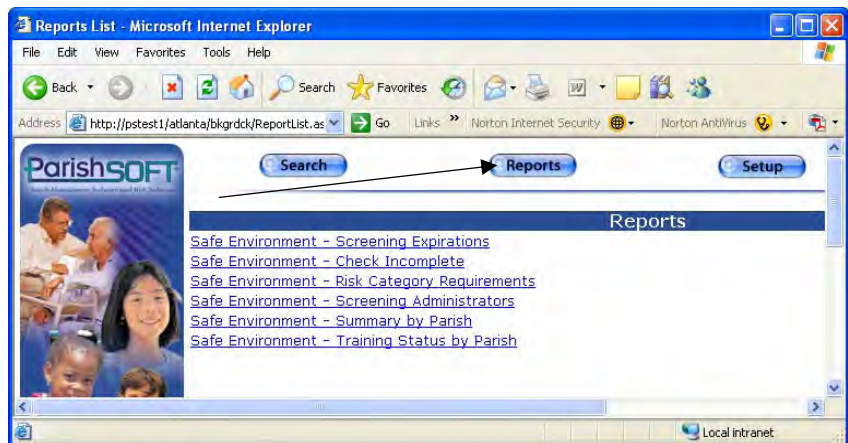
Background screening administrators can view and print reports on background screening data. Organization Administrators can view and print reports only for the organizations which they administer.

1. Click the **Reports** menu. The reports that are available for your administrator privilege level will display. For example, the **Screening Administrators** report is available for Global Administrators but not for Organization Administrators
2. Select the report you wish to view and set the parameters (i.e., filters).
3. Click **Preview Report**.

Examples of the available reports are provided beginning on the following page.

### Acrobat Reader Required to Print Reports

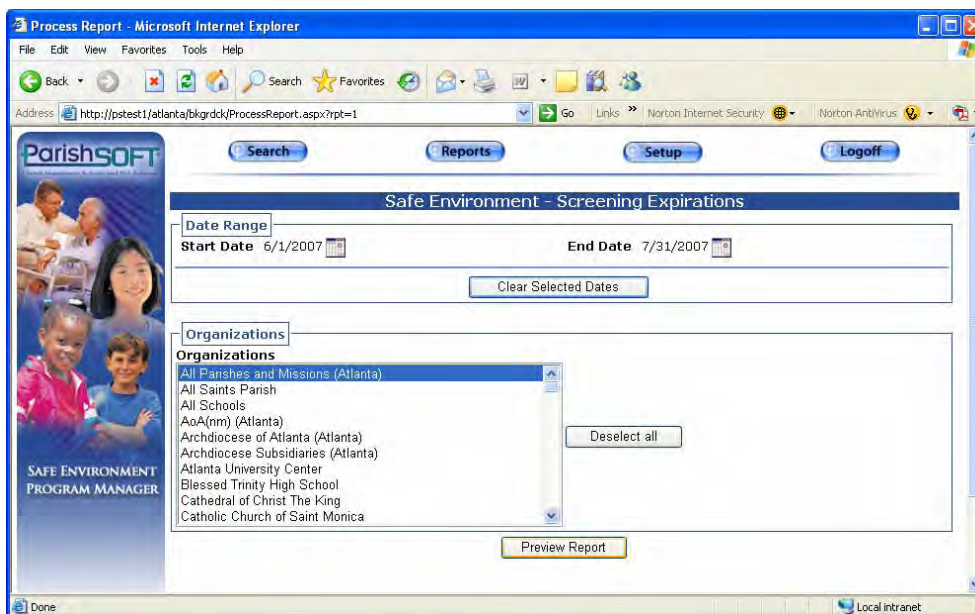
The Crystal reports in your SEP Manager have some special printing requirements, so if you don't already have the free Adobe Acrobat Reader installed on your desktop, please visit [www.adobe.com](http://www.adobe.com) to install the latest version. Once Acrobat Reader is installed, just click the **Printer** icon...then click it again to send the report to your local printer.



## Screening Expirations

This report displays background screening requirements that have expiration dates. Use this report to track expiration dates in your SEP Manager so that you can renew clearances per the policies of your diocese.

1. Click **Safe Environment – Screening Expirations** from the **Reports** menu.
2. Click the **Start Date Calendar** icon and double-click on the desired date.
3. Click the **End Date Calendar** icon and double-click on the desired End Date.
4. Click the **Organization(s)** you wish to include in your report. To select multiple organizations, press and hold your **<Ctrl>** key while you click on organization names.
5. Click **Preview Report**.



## Check Incomplete

This report displays background screening requests that are incomplete. Global Administrators can filter the report by organization and/or a specified Due Date range. Results are sorted alphabetically by Organization name, then by person name. Each Assignment Type and requirement is listed, along with the date the screening request was entered, and the date the requirement is due.

You can select specific dates or leave the date fields blank to view all requirements that must be renewed. Expiration dates can be established by setting a Renewal Interval (in Years) for any requirement. Global Administrators can edit requirement details using the Edit Screening Requirements procedure on page 22.

1. Click **Safe Environment – Check Incomplete** from the **Reports** menu.
2. Click the **Organization(s)** you wish to include in your report. To select multiple organizations, press and hold your **<Ctrl>** key while you click on organization names.
3. Click **Preview Report**.

Back to: Reports List

Page 1 of 25

### Safe Environment - Check Incomplete

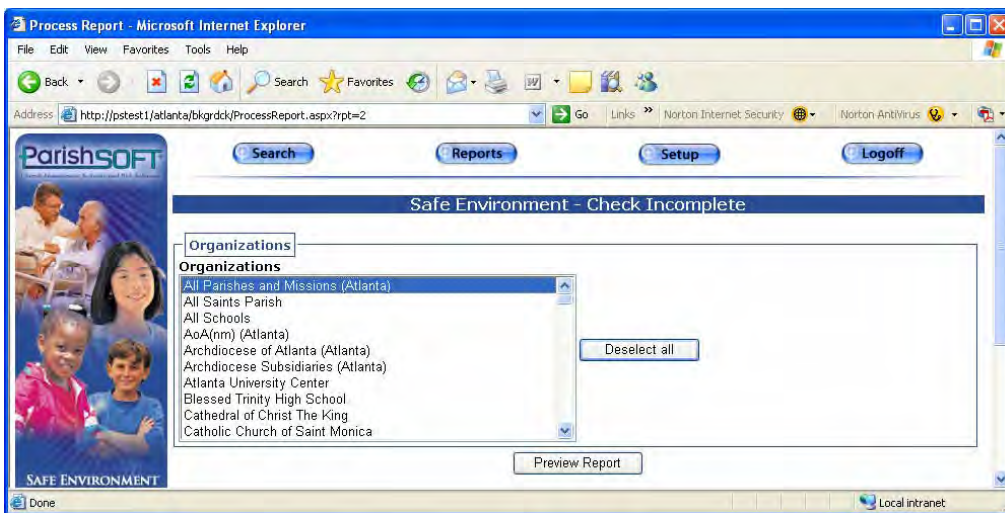
Organization: **Cathedral of Christ The King**

Address: 2699 Peachtree Rd NE  
 City: Atlanta  
 State: GA  
 Phone #: (404) 233-2145

Position: **Accountant**  
 Full name: **Tester, Tester**

Requirement	Entered	Due
Code of Conduct Acknowledgement Form	04/12/2007	
Employment Application	04/12/2007	
Felony including misdemeanor (10 years)	04/12/2007	
Ministerial Standards Educators	04/12/2007	
Ministerial Standards/Vulnerable Individuals	04/12/2007	
References - 3 non related (i.e. not family)	04/12/2007	
Sexual Abuse Policy Acknowledgement Form	04/12/2007	
Social Security Verification	04/12/2007	
Video Acknowledgement Form	04/12/2007	

Position: **Accounting Clerk**  
 Full name: **xParker, xPeter**

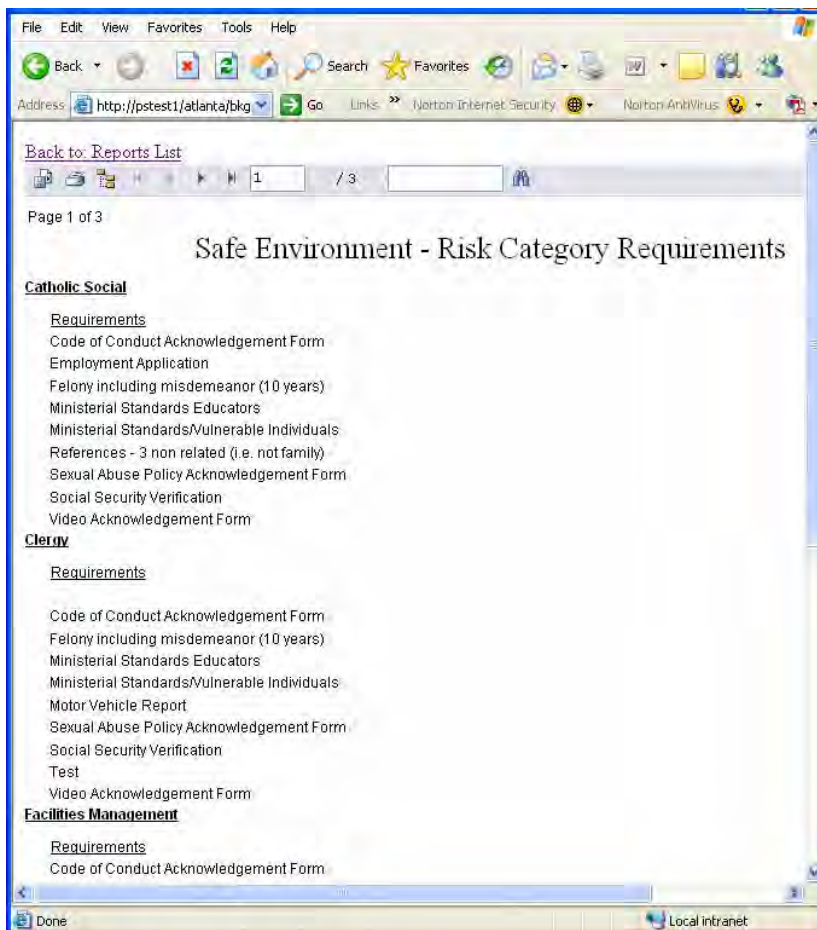




## Risk Category Requirements

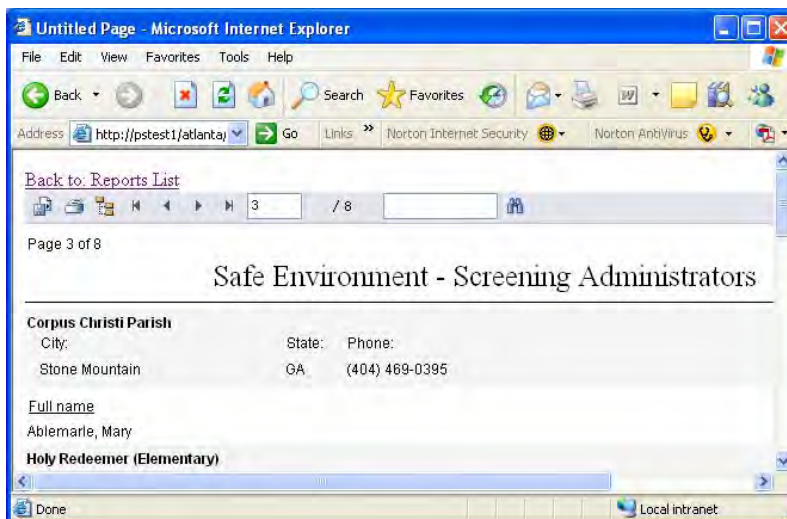
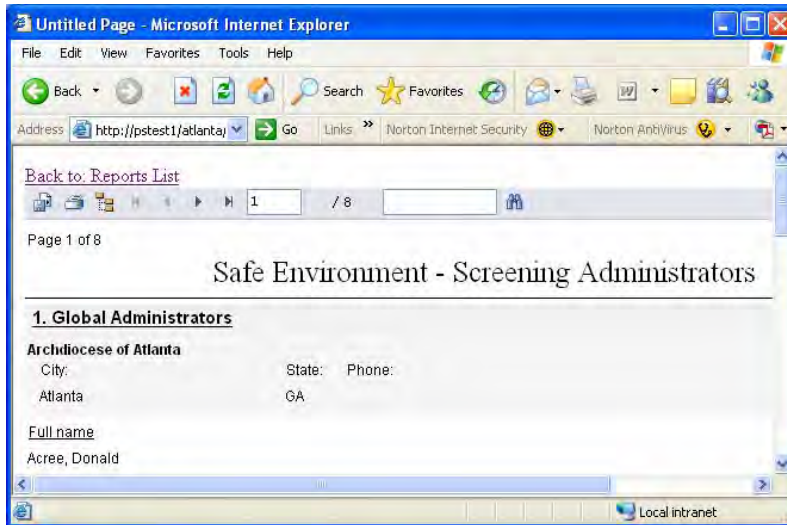
This report lists the requirements that are mapped to each of the risk categories in your SEP Manager.

1. Click **Safe Environment – Risk Category Requirements** from the **Reports** menu.
2. Click **Preview Report**.



## Screening Administrators

This report displays the people who have background screening administrator privileges. The Global Administrators are listed at the top of the page; Organization Administrators are listed below, in alphabetical order by organization name/person name.

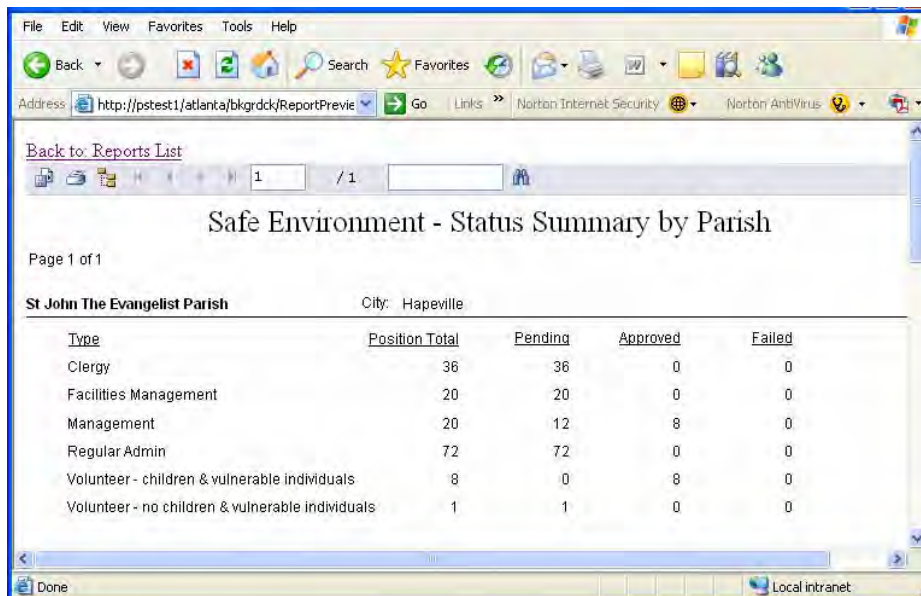
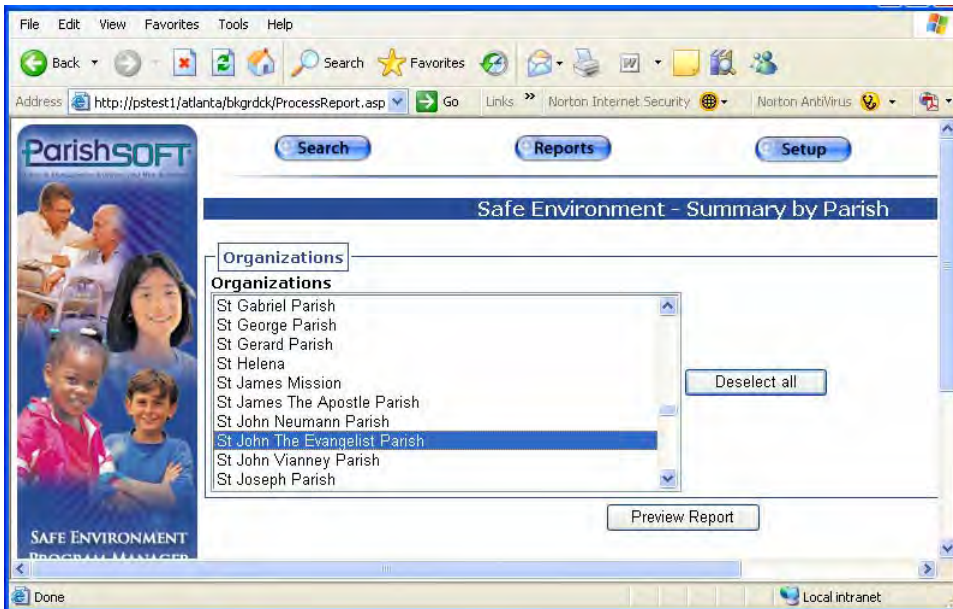


## Summary by Parish

This report displays background screening summary results including the total number of positions held in each screening risk category, number of background screenings that are pending, approved, and failed. Global Administrators can view all organizations in the diocese at one time or filter the report by organization.

Organization Administrators will have only their organization(s) available to them for this report.

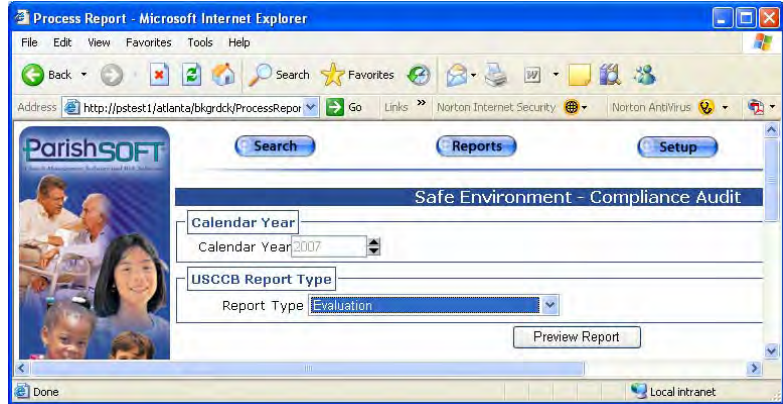
1. Click **Safe Environment – Summary by Parish** from the **Reports** menu.
2. Click the **Organization(s)** you wish to include in your report. To select multiple organizations, press and hold your **<Ctrl>** key while you click on organization names.
3. Click **Preview Report**.



## Compliance Audit

This report includes the data that has been specified in the Configure USCCB Audit procedure on page 39.

1. Click **Safe Environment – Compliance Audit** from the **Reports** menu.
2. Click the **Report Type** (i.e., Training or Evaluation).
3. Click **Preview Report**.



Back to: Reports List

1 / 2

**DO NOT ALTER THE FORMAT OF THIS DOCUMENT. ANSWER THE QUESTIONS AS WRITTEN. USE THE SMALLER TABLE ON PAGE 2 TO PROVIDE NARRATIVE EXPLANATIONS**

**2007 COMPLIANCE AUDIT -- CHART D**

**Article 13 -- Background Evaluations**  
**Diocese/Eparchy of Archdiocese of Atlanta**  
**Cardinal Archbishop/Bishop/Eparch Archbishop**  
**Audit Period 07/06/2006 - 07/06/2007**

**Responsible Diocesan/Eparchial Employee(s) Mary Ablemarle**

Complete for **each category**: To the extent possible, if persons belong in more than one category, count them in their primary category (e.g. educators who are also parents should be counted as educators).

**For those dioceses/eparchies receiving a focused audit on Article 13, fill in only those categories where a deficiency was identified in 2,006.00.**

**Priests/Deacons** - include any religious order or diocesan priest/deacon in active or supply ministry (including "retired" priests and/or deacons who continue to celebrate the occasional Mass, wedding, baptism, etc.) since these activities put them in a position to be around children;

**Candidates for Ordination** - include seminarians, candidates for the seminary, and candidates for the diaconate who are over the age of 18;

**Educators** - salaried teachers in diocesan/eparchial and parish schools;

Back to: Reports List

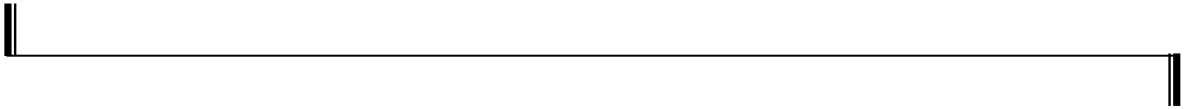
2 / 2

	Total Number	Total Number of Evaluations Completed	Total Number of Evaluations Remaining	Date Scheduled for Completion of Evaluations	Describe Evaluation Process Used
<b>Priests</b>	*****	*****	*****	*****	Safe Environment Program
<b>Deacons</b>	*****	*****	*****	*****	Safe Environment Program
<b>Teachers</b>	35.00	30.00	5.00	08/15/2007	Safe Environment Program

Use the space below to explain any gaps between those estimates of total numbers and the estimates of the total numbers remaining to be framed, and how the diocese/eparchy is planning on closing those gaps.

[Use a separate row for each category requiring an explanation. Rows explained as information is typed in. To add rows to this table, place cursor in an empty cell, click Table (in toolbar at top of screen), click on Insert, and then click on either "rows above" or "rows below."]

*APPENDIX B*



*INDEX*

- Access Rights
  - system security, 32
- Add New Requirement, 22
- Address
  - for ParishSOFT, 2
- Administrator
  - Create, 28
  - Edit Privileges, 28
  - management, 28
- Administrator Types, 10
- Administrators
  - create report of, 31
  - grant Global privileges in Diocesan Directory, 30
  - view list of, 30
- Agency
  - delete, 33
  - specify in requirement details, 33
- Audit Requirements
  - for USCCB, 38
- Before You Begin, 18
- Categories
  - reason for, 25
- Category
  - search category, 44
- Choose Categories for Positions, 26
- Choose Requirements for Categories, 25
- Command Key
  - request from ParishSOFT Support, 10
- Completed – Signed and Received, 20
- Compliance Audit Report, 60
- Configuration Process, 18
- Configure SEP Manager, 18
- Confirm the Successful Screening Request, 43
- Create New Status Description, 20
- Dashboard, 43, 49
  - configuration options, 49
  - customize, 50
  - display icon, 51
  - return to complete details view, 51
  - view, 49
- Diocesan Directory
  - creating Global administrators in, 30
- Edit
  - Categories, 24
  - Category Description, 24
- Edit Screening Requirements, 22
- Edit Status Values, 19
- Email
  - for ParishSOFT, 2
- Expired, 20
  - screenings report, 55
- Expired Requirement, 46
  - based on Renewal Interval (years) value, 46
  - example of, 47
  - set status manually, 47
- Failed, 20
- Find a Person's Screening Results, 44
- Find Person
  - search category, 44
- Global Administrators
  - grant privileges using Diocesan Directory program, 30
  - rights in background screening, 11
- In Category
  - search category, 44
- In Organization
  - search category, 44
- Incomplete Screenings Report, 56
- Initial Setup
  - Choose Categories for Positions, 26
  - Choose Requirements for Categories, 25
  - Edit Categories, 24
  - Edit Screening Requirements, 22
  - Edit Status Values, 19
  - Manage Background Screening Administrators, 28
  - Manage External Agencies, 33
  - Review Requirements for Each Screening Category, 27
  - USCCB List Management, 36
- Initial Setup Requirements, 8
- Key Concepts, 8
- Log in
  - from Internet Browser, 14
  - from Member Screen, 13
- Logical Status Values, 19
  - map to status descriptions, 19
- Login Rights
  - system security, 32
- Login-Based System Privileges, 10
- Manage Background Screening Administrators, 28
- Manage External Agencies, 33
- Manage USCCB Group List, 36
- Map
  - positions to categories, 26
- Merge/Delete
  - Status Values, 21
- N/A - Minor, 20
- Not Initiated, 20
- Organization
  - search category, 44
- Organization Administrators
  - rights in background screening, 10
- ParishSOFT contact information, 2
- Passed, 20

- Passed – Contact HR, 20
- Password
  - require administrators to change from default of "pass", 32
- Pending, 20
- Phone
  - for ParishSOFT, 2
- Policies
  - determined by diocese, 8
- Position
  - search category, 44
- Position-based Requirements, 8
- Positions
  - choose categories for, 26
- Privileges
  - for Global Administrators, 11
  - for Organization Administrators, 10
  - system security, 32
- Protect Your Password, 15
- Protection of Social Security Numbers, 44
- Remove a Requirement, 23
- Renewal Years
  - Update in Existing Requirement, 23
  - Update only new screening requests, 23
- Report
  - Screening Administrators, 31
  - search, 31
- Reports, 54
  - Check Incomplete, 56
  - Compliance Audit, 60
  - print with Acrobat Reader, 54
  - Risk Category Requirements, 57
  - Screening Administrators, 58
  - Screening Expirations, 55
  - Summary by Parish, 59
- Request New Screening, 42
- Requirement
  - add new, 22
  - assign to category, 25
  - Dashboard display settings, 52
  - expired, 46
  - remove, 23
  - status descriptions, 20
  - status symbols, 48
  - update, 45
  - update expired, 46
- Requirements
  - initial setup, 8
  - position based, 8
  - results shared across all positions, 8
- Review Requirements for Each Screening Category, 27
- Risk Category Requirements Report, 57
- Screening Administrators Report, 58
- Screening Policies
  - determined by diocese, 8
- Screening Request
  - create new, 42
  - view, 43
  - view Dashboard, 43
- Screening Requirements
  - shared among all position types, 8
- Screening Results. See Reports
  - update, 45
  - update requirement in multiple positions, 46
- Screening Results or Status
  - initial view, 44
- Screening Status
  - view/edit, 45
- Search
  - screening data by Name or Category, 44
  - within report, 31
- Secure Logins for Background Screening, 10
- Security
  - of SEP Manager data, 15, 32
  - of SSNs, 44
- SEP Manager
  - Flexibility, 8
  - Overview, 8
- Setup
  - for Global Administrators, 18
- Social Security Numbers, 44
  - search by full or partial, 44
- Sr. Mary Teachmeall Example, 9
- Status Values
  - Merge/Delete, 21
- Summary by Parish Report, 59
- Summary Status Symbols, 48
- Support
  - contact information, 2
- Technical support, 2
- USCCB
  - configure audit, 39
  - configure positions, 37
  - manage group list, 36
  - set up audit requirements, 38
- View/Edit Screening Status, 45
- Website
  - for ParishSOFT, 2
- Who Are My Administrators?, 30
- With Position
  - search category, 44
- With SSN
  - search category, 44