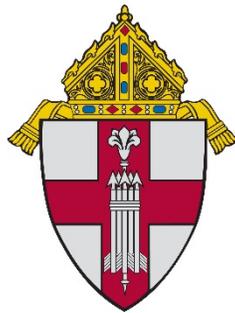


Safe Environment Database User Guide

**Diocese of Manchester
Safe Environment Office**



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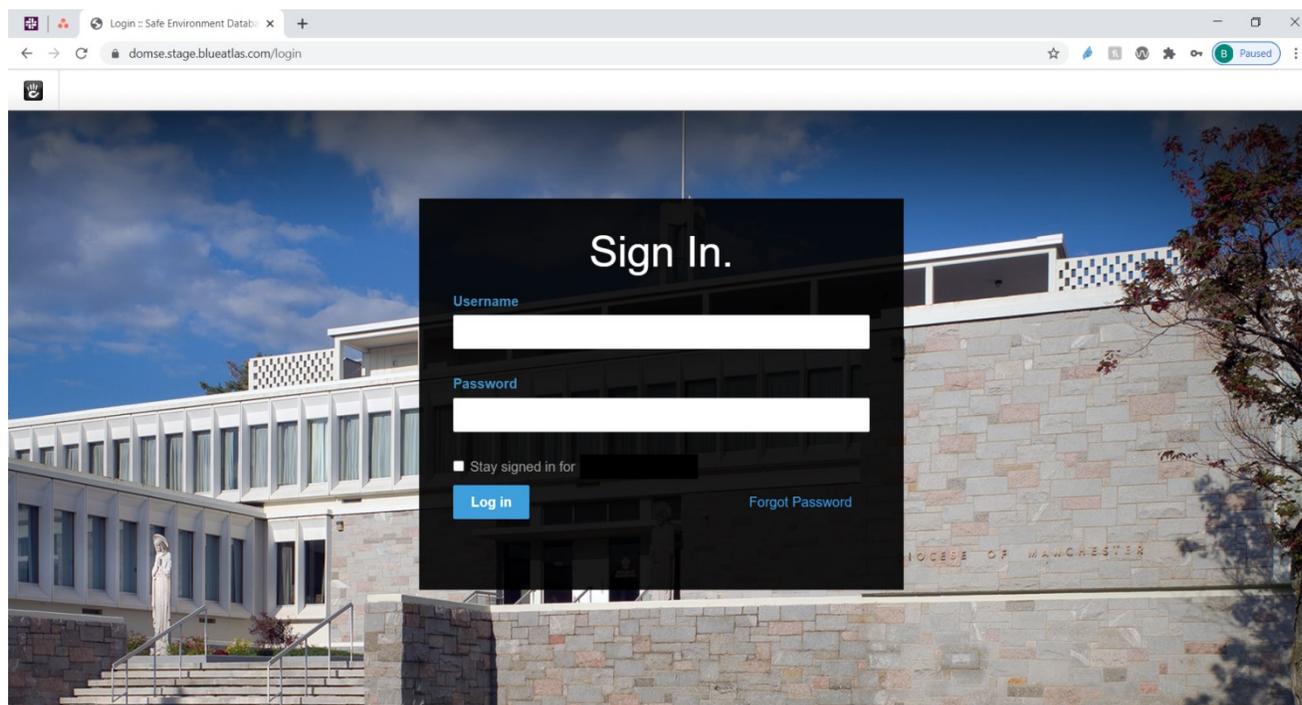
INTRODUCTION

The Diocese of Manchester Safe Environment Database is a web-based application that allows authorized users to maintain the safe environment information for their parish, school, or camp. This User Guide is for Safe Environment Coordinators and other authorized database users.

I. LOGGING IN TO THE SAFE ENVIRONMENT DATABASE (“SED”)

The SED is available via any internet-connected device. Using the browser of your choice, access the SED at the following URL: www.rcbmnh.org

The login screen will display as follows (background picture may change periodically):



Enter your user name and password (available from Safe Environment Office) and click ‘Login.’

Forgot Password: If you do not remember your access credentials, click the blue ‘Forgot Password’ link. The system prompts you to enter the email address associated with your Safe Environment Database account. Then click ‘Reset and Email Password’. If the email address you entered is valid, you will receive an email message providing a reminder of your user name, along with a link to update your password. Click on the link to reset your password.

The application allow five attempts to login to the SED. After five unsuccessful login attempts, the following message will be displayed:

“Unable to complete action. Please contact the administrator of this site for more information.”

If this happens, proceed to update your login credentials by clicking 'Forgot Password' as described above.

Login Email Message: Upon successfully logging into the SED, as a security measure, you will receive an email message indicating that you logged in. The message will contain the time that you logged in. The following is a sample message:

“We noticed a recent login to the Safe Environment Database:

Date: xxxxxxxx

Time: xxxxxxxx

Not you? It is possible your account to the Safe Environment Database has been compromised. Please take the following steps:

1. Re-set your password - Go to {link}
2. Notify the staff of the Safe Environment Office:

If you receive a login message and you have not logged in, or receive a password reset email that you did not initiate, your account credentials may have been compromised. Please change your password immediately and notify the staff of the Safe Environment Office.

II. DASHBOARD

Upon successful login, the **dashboard** is displayed. (Note: if there are any messages from the Safe Environment Office, they will display at the top of the dashboard. Message(s) can be closed by clicking the “X” in the upper right of the message box).

Throughout the application, your **user name** is displayed in the upper right corner. Clicking the down arrow next to your user name will provide an alternative way to reach the My Account section, as well as the link for logging out of the app, which should be done at the end of each working session.

The following dashboard view is your 'snapshot' of Employee/Volunteer data associated with your entity (ies) and includes many links to navigate throughout the application.

The dashboard includes the following sections:

1. Employee/Volunteer Statistics (top left-hand area): This section provides an at-a-glance overview of the number of active and pending employees and volunteers (E/V) at your entity (ies). Clicking on the “Active” icon will direct you to a list of all active E/Vs and clicking on the “Pending” icon will direct you to a list of all pending E/Vs.

2. Overdue Section (top right-hand area): This table displays the list of employees/volunteers whose records are currently overdue. Click the “View All” link to be re-directed to a view of all records that are overdue.

3. Upcoming Renewals Section (bottom section): This table displays the list of employees/volunteers who have at least one date (training and/or criminal record check) that is coming up for renewal within the next 90 days. This table has an intuitive color coding legend: green is compliant; yellow is upcoming (within 90 days); red is overdue.

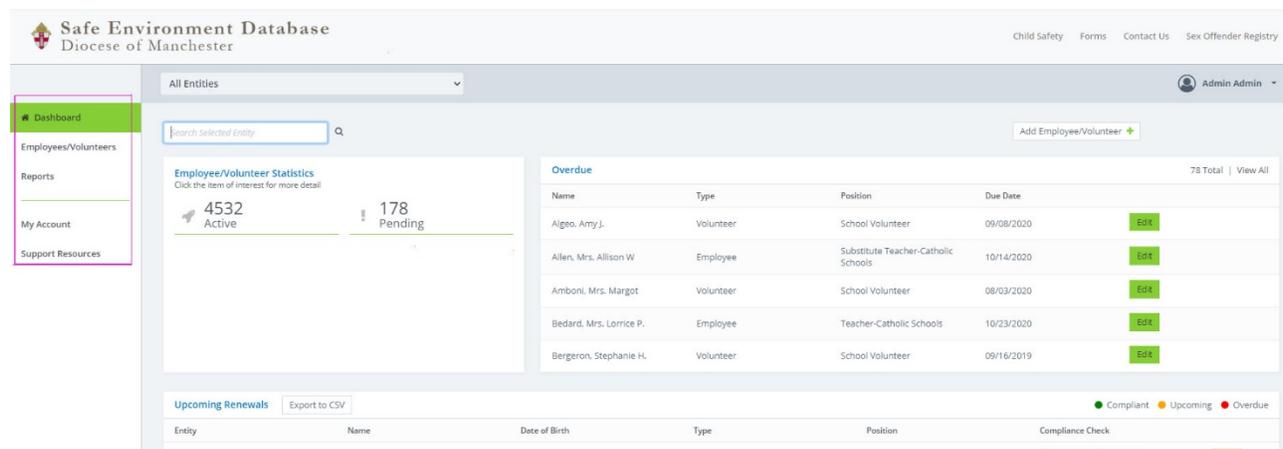
4. Search boxes: There are two search boxes.

4a. Search Selected Entity (top left) - This search is used to search a name in your parish, school or camp.

4b. Add Employee/Volunteer (top right) - This search is used to search a name in the entire database.

III. NAVIGATION PANEL

The navigation panel is located on the left-hand side of the dashboard and is also available throughout the application.



The navigation panel includes the following links:

- 1. Employees/Volunteers:** This link directs the user to a page listing all employees and volunteers who are affiliated with user's entity (ies) (parish, school and/or camp). See Section V for additional information.
- 2. Reports:** This link directs the user to a page where the user can view, export and print reports for user's entity(ies).
- 3. My Account:** This link allows the user to add and/or edit their personal account information, including name, email, address, phone and password.

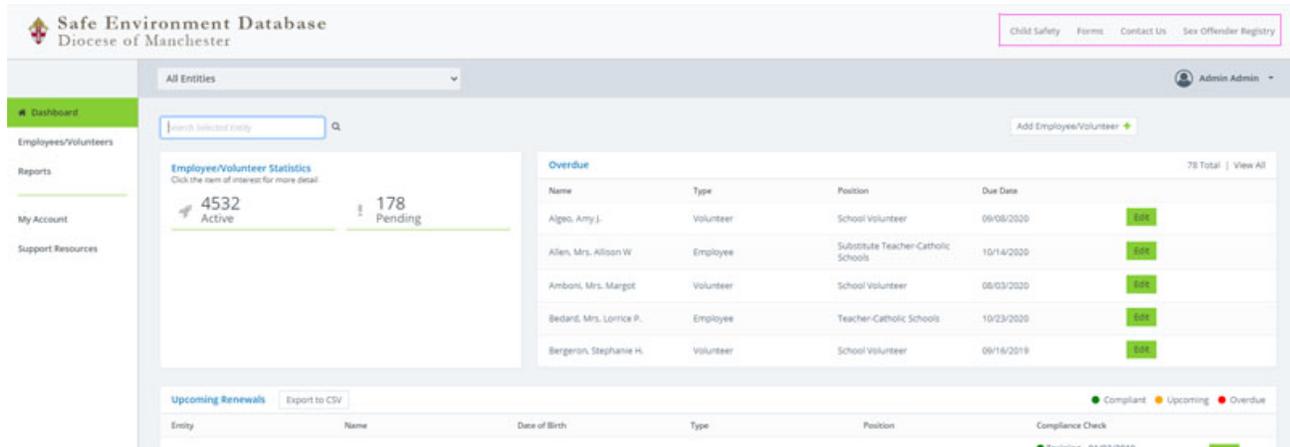
To update your password, enter your new password and confirm it. If you made an error typing in the password, you will receive the following error message upon trying to save the password update: "The two passwords provided do not match." When your updates are completed, click the green 'Save' button to record the changes.

4. Support Resources: This link provides quick access to support resources, including:

- User Guide
- Frequently asked questions (FAQ)
- Resource guide
- Details about the current version of the Safe Environment Database Application

IV. EXTERNAL LINKS

External links, which bring the user to other helpful sites, are located at the very top of each page throughout the SED.

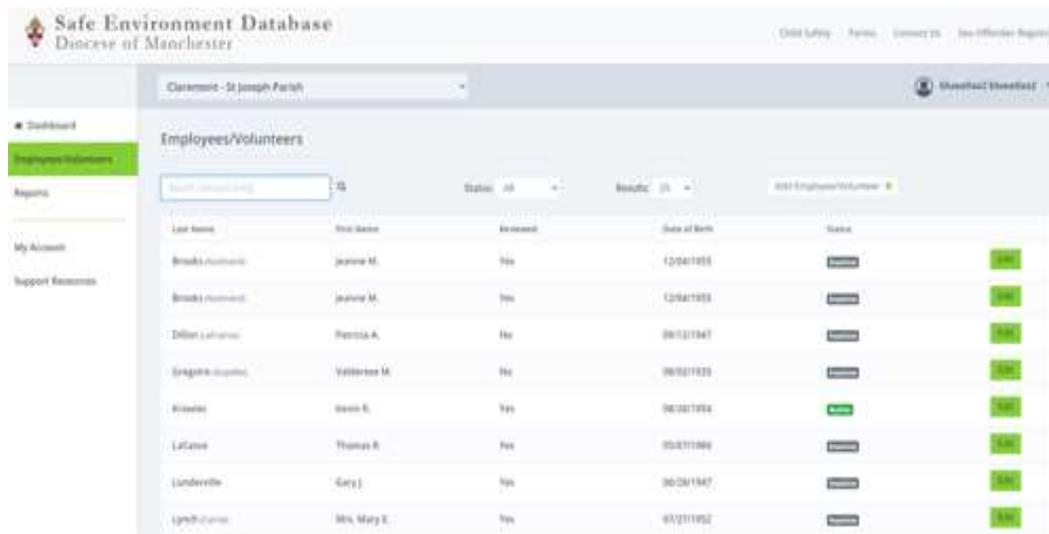


These links are:

- **Child Safety:** Directs to the Child Safety page of the Diocese of Manchester website (www.catholicnh.org/safety).
- **Forms:** Directs to safe environment-related forms (applications, criminal check forms) on the Diocese of Manchester website (www.catholicnh.org/forms).
- **Contact Us:** Displays contact information for Safe Environment staff and technical support. To send an email, click on the displayed email address.
- **Sex Offender Registry:** Links to the National Sex Offender Public Website (www.nsopw.gov).

V. EMPLOYEE/VOLUNTEER SCREEN

To view or add information for employees and volunteers, click on the Employees/Volunteers tab in the left-hand Navigation Column. The tab will now display with a green background.



After selecting the entity you wish to view (if you manage more than one entity), you can choose how to filter the list of displayed Employees/Volunteers. Using the 'Status' dropdown, there are five options for filtering status.

All (this is the default selection): lists all Employees/Volunteers within the entity (ies) and includes all statuses: Active, Pending and Inactive.

Active: lists Employees/Volunteers with a status of Active.

Pending: lists Employees/Volunteers with a status of Pending.

Inactive: lists Employees/Volunteers with a status of Inactive.

Under 18: lists Employees/Volunteers with a status of Under 18.

The Employee/Volunteer page will list up to 100 E/Vs per page; the default number is 25. Use the 'Results' dropdown to select '50' or '100' results per page. If the number of results exceeds the number to be displayed per page, then you will see additional page links at the bottom of the results. Use these links to navigate through the returned results.

A. EMPLOYEE/VOLUNTEER EDIT

There is a green 'Edit' button to the right of each listed name. Click on this button to access the detail view for that specific Employee/Volunteer. The detail view is shown below:

Safe Environment Database
Diocese of Manchester

Child Safety

Dashboard
Employers/Volunteers
Reports
My Account
Support Resources

Edit Employee/Volunteer

Added On: Jun 8, 2018 10:03 am
Last Update: Dec 14, 2020 2:18 pm

Personal

First Name: Maurice Middle Name: D. Last Name: Abalim Title: Reverend
 Suffix: Date of Birth: 06/28/1963 Other Last Name: Other Last Name:
 Comments:

Compliance

Training Date: 09/19/2016 Other State CRR: CP
 NH CRR Date: 08/30/2017 Other State CRR Date: 06/06/2012
 Sex Offender Reg Date: 01/15/2020 Second State CRR:
 AF Date: 09/19/2016 Electronic Form Second State CRR Date: MM/DD/YYYY
 Application Location: Priests Electronic Form Fingerprint Check Date (school only): MM/DD/YYYY
 SH Training Date: MM/DD/YYYY Other Training: Sexual Harassment: Other Training Date: 12/07/2020

Flags

Restricted Restriction Notes:
 Do Not Send
 Reviewed
 Archive Date: MM/DD/YYYY

Locations

| Entity | Personnel Type | Job Position | App Location | Notes | Status |
|---------|----------------|--------------|--------------|-----------------------------|--------|
| Priests | Priest | Priest | On File | Diocese of Onitsha, Nigeria | Active |

Cancel Update

The Employee/Volunteer detail page is organized into three sections:

Personal Information

This section displays name(s), title, suffix, date of birth and a Comments section. The user is able to update all of this data except for the 'Comments' section.

Compliance Information

This section displays the following data:

Training Date (safe environment training)

New Hampshire criminal record check ("NH CRR") date

Sex offender registry ("Sex Offender Reg") date

Acknowledgement form ("AF") (Electronic box, when checked, indicates that the form was signed electronically). If there is an acknowledgment form date listed under more than one entity, the Acknowledgement Form Date field displays the most recent date.

Application Location (Electronic box, when checked, indicates that the form was completed

electronically)
Sexual Harassment (“SH”) training date
Other State CRR type and date
Second state CRR type and date
Fingerprint check date (schools only)
Other training type and date

In this section, the Entity User is able to update only the Sex Offender Registry Date. All other data is ‘view only’.

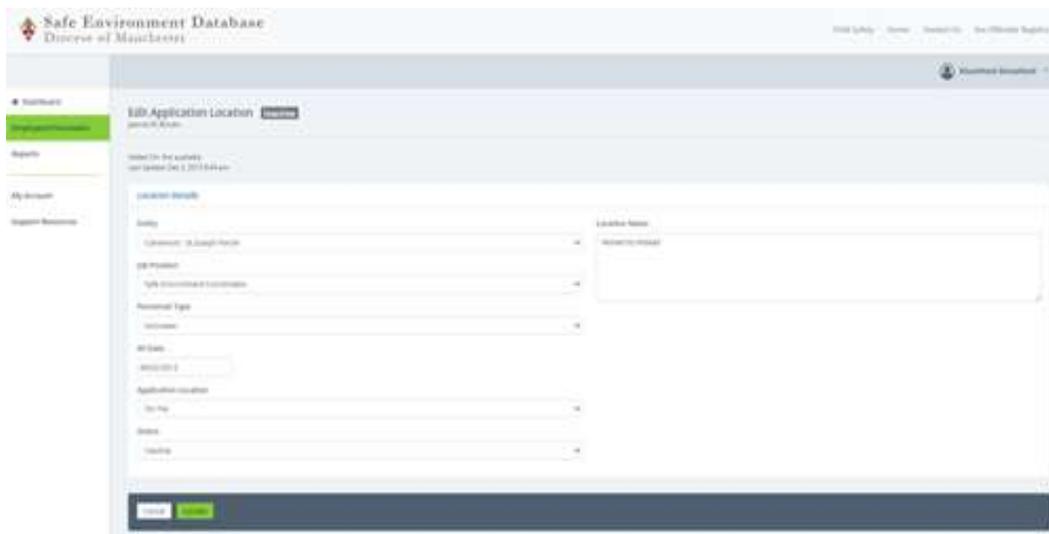
Locations

This section displays the entity(ies) and related information associated with the Employee/Volunteer. The Entity User can update this information by clicking the green ‘Edit’ button located to the right of the E/V name.

The Acknowledgement Form Date and Application Location are pulled from the ‘Edit Location’ view (on the next page).

Edit Location Information

To edit the information associated with your location(s), click on the green ‘edit’ button next to the location (see screenshot above). The following screen will be displayed.

The screenshot shows the 'Safe Environment Database' interface for editing an application location. The page title is 'Edit Application Location'. On the left, there is a navigation menu with 'Home', 'Reports', 'My Account', and 'Support Resources'. The main content area contains a form with several fields: 'Entity' (a dropdown menu), 'Location Name' (a text input field), 'Address' (a text input field), 'City' (a dropdown menu), 'State' (a dropdown menu), 'Zip Code' (a text input field), 'Application Location' (a dropdown menu), and 'Status' (a dropdown menu). At the bottom of the form, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted in green.

Using the dropdown selections and data fields, an Entity User is able to update any of the information on this page. If an employee/volunteer status is updated to Active, the system will check to ensure that the employee/volunteer is up-to-date with all safe environment requirements.

If all requirements are met, the status of ‘Active’ will be saved. If any of the required information is missing or overdue, the system will not allow the employee/volunteer status to be updated to Active status. Pending must be selected.

Once finished, click the green 'Update' button to save any changes. If you need to start over, click 'Cancel.'

B. SEARCHING AND ADDING NAMES

The screenshot shows the 'Safe Environment Database' interface for the Diocese of Manchester. The main content area is titled 'Employees/Volunteers'. At the top, there is a search bar labeled 'Search Selected Entity' with a magnifying glass icon. To the right of the search bar is a dropdown menu for 'Status' set to 'All' and a 'Results' count of '25'. Further right is a button labeled 'Add Employee/Volunteer' with a plus sign. Below the search bar is a table with columns: Last Name, First Name, Reviewed, Date of Birth, and Status. The table contains six rows of data. Each row has a green 'Edit' button to its right. The interface also includes a sidebar with navigation options like 'Dashboard', 'Reports', 'My Account', and 'Support Resources'. The top right corner has links for 'Child Safety', 'Forms', 'Contact Us', and 'Sex Offender'.

| Last Name | First Name | Reviewed | Date of Birth | Status | Action |
|---------------|---------------------|----------|---------------|----------|--------|
| A'Hearn | Br. Joseph A. | No | 07/10/1988 | Archived | Edit |
| Abald | Lynda M. | No | 05/22/1957 | Archived | Edit |
| Abaslim | Reverend Maurice O. | Yes | 08/28/1963 | Active | Edit |
| Abate (Phine) | Mary E. | Yes | 10/19/1965 | Deceased | Edit |
| Abate | Virginia K. | No | 06/20/1986 | Archived | Edit |

1. Search a Name Within Your Entity(ies)

From either the Dashboard or the Employees/Volunteers screen, there is an option to search for an E/V associated with your entity(ies). The search box is located on the top left and is labeled "Search Selected Entity."

You are able to search by:

First name

Last name

First name and last name (in that order) EXAMPLE: Mary Smith, NOT Smith, Mary

Partial name

Upon entering the name(s), click the search icon (or hit 'Enter' on your keyboard). Any Employee/Volunteer records that match the search criteria will be displayed in alphabetical order by last name.

To clear a search, click the 'X' in the search field and click the search icon (or hit 'enter').

If the search does not generate any results, the following message will display: "No records found."

2. Search a Name within the Entire Database

Entity users may add an existing E/V record to their entity(ies). This is done by searching the entire database.

From the Dashboard or Employee/Volunteer screen, start the process of adding a new location by clicking the 'Add Employee/Volunteer' button.

Enter the name to be searched. [This can be first name, last name, first name/last name, or a partial name]. Click the search icon (or hit the 'Enter' key on your keyboard).

Search results will display in alphabetical order by last name. When you locate the record you are looking for, click the green 'Select' button of the associated record. You will now be able to view the record and further determine if you want to add this record to your entity.

Next, you will either ADD THE EXISTING FILE TO YOUR ENTITY or, if the name is not in the database, ADD THE NAME AS A NEW EMPLOYEE/VOLUNTEER.

a. ADDING THE EXISTING FILE TO YOUR ENTITY

An Add Location button is located near the bottom right of the Employee/Volunteer detail screen in the Locations Section.

Click this button and the 'Add Location' screen will display. This consists of the following data fields:

Entity* (dropdown will only display those entities for which you have user privileges)

Job position dropdown*

Personnel type dropdown*

AF (acknowledgement form) date

Application location dropdown: Choose 'On File' if you have received the volunteer's application)

Status dropdown (select from active, pending, inactive, under 18, deceased)

Location Notes: This field is an optional can be used for added information, reminders, and communications

* *Required field*

Safe Environment Database
Diocese of Manchester

Dashboard
Employees/Volunteers
Reports
My Account
Support Resources

Add Application Location
jacqueline D. Godin

Location Details

Entity:

Job Position:

Personnel Type:

AF Date:

Application Location:

Status:

Location Notes:

Cancel Add

Complete required fields and application location if you have the application. If all requirements have been met the status of 'Active' can be saved. If not, you must choose the status of Pending. If you attempt to set the status as active but some of the required information is missing or overdue, the system will not allow the employee/volunteer status to be updated to Active status.

Once done, click the green 'Add' button. If you need to start over, click 'Cancel.'

b. ADDING A NEW NAME TO YOUR ENTITY

First, follow the process described above in B. 2, "Search a name within the Entire Database"

If the Employee/Volunteer name is displayed, follow the instructions noted above in Section B.2.a., "ADDING THE EXISTING FILE TO YOUR ENTITY"

If the Employee/Volunteer name is not found, then proceed to add a new record by clicking the "Add Employee/Volunteer" button.

Safe Environment Database
Diocese of Manchester

Dashboard
Employees/Volunteers
Reports
My Account
Support Resources

Verify New Employee/Volunteer

first

No records found.

The following fields are those for which you can enter data:

First name*

Middle name

Last name*

Title
Suffix
Date of birth
Other last name (two optional fields)
Sex offender registry date
Entity (will only list those entity(ies) for which you have privileges)*
Job position*
Personnel type*
Acknowledgement form date
Application location
Status (Default is pending)*
** required fields*

Once you have entered the available data, click the green 'Add' button and the person is added to your Pending list. If you elect to start over, click 'Cancel.'

VI. DATABASE STATUSES

Active

Active refers to all employees and any volunteers who have contact with minors as described in the diocesan *Screening and Training Protocol*.

Pending

When a new employee/volunteer record is added, the name will be displayed as pending. The name will remain in this status until all requirements are met. The database begins to track the 30-day compliance timeline on the day that a new name is added as pending.

The record (name) will display as overdue after remaining in pending status for 30 calendar days. Overdue records will display:

In the Overdue section on the dashboard.

In the Employee/Volunteer search results when the status of "Pending" or "All" is selected in the status dropdown.

In addition, automated notices will be sent from the SED on the 10th of each month indicating names of overdue E/Vs.

Inactive

Inactive refers to those who are no longer employed or volunteering at the entity.

Under 18

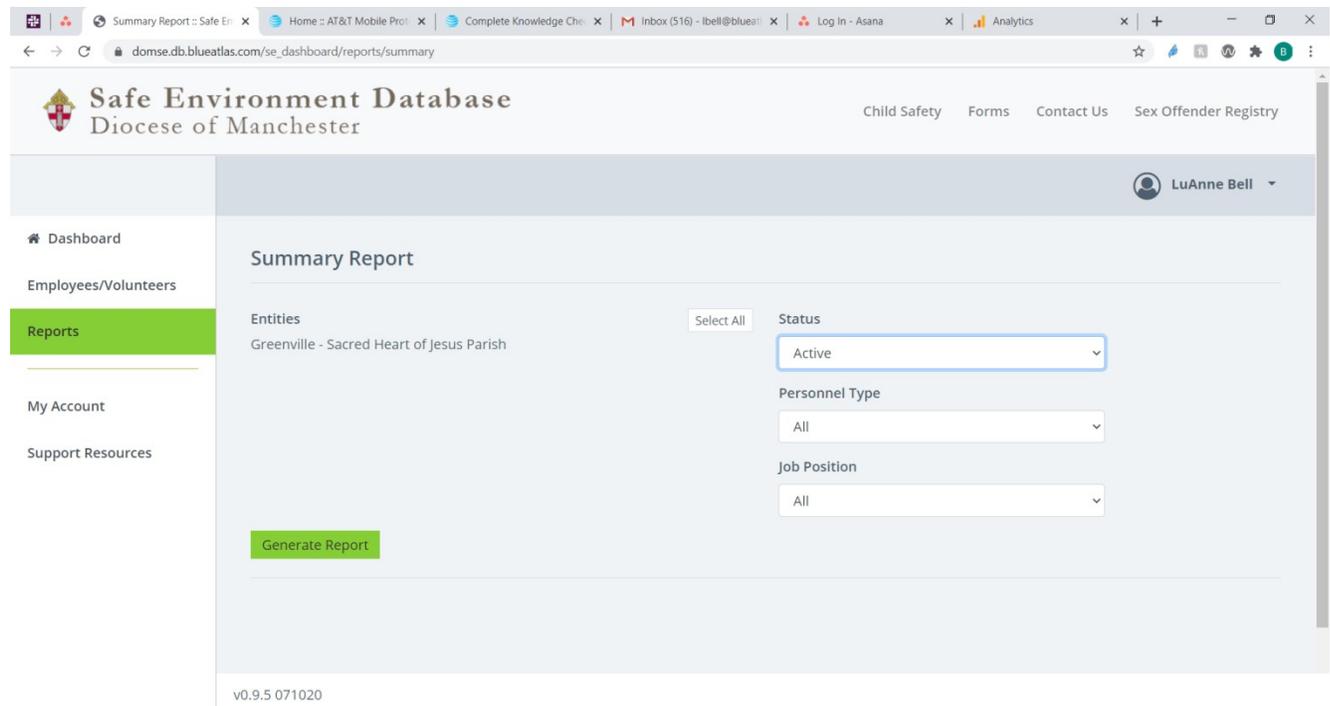
It is not necessary to add volunteers who are under 18 years of age. However, 17-year-old E/Vs may be added to the SED and assigned the status "**Under 18**" if it is anticipated that they will be turning 18 while volunteering.

The database will treat an Under 18 record as inactive until the month the person turns 18, at

which time the database will change the status to pending and will send a notifying email to the Safe Environment Coordinator. The coordinator should then either have the individual complete requirements (if still working with minors) or change the status to inactive (if no longer working with minors).

VII. REPORTS

Clicking the 'Reports' link in the left-hand navigation bar will direct the Entity User to the view for generating a Summary Report.



If you manage one entity, the entity selection is automatic. If you manage more than one entity, and wish to include them all in the report, click the 'Select All' button. To select some but not all entities, hold down the CTRL key and click each of the entities that should be included in the report.

After selecting the entity(ies), select from the following options.

Status (active, pending, inactive, Under 18, or All). Note: Records for archived and deceased E/Vs will not be included in the Summary Report.

Personnel Type The personnel type options are:

- Employee: only employees
- Volunteer: only volunteers
- All: Employees and volunteers

Job Position Select “All” to choose all job positions or use the drop down list to select a single job position such as coach, child care worker, etc.

Then click **Generate Report** to display the results.

Summary Report

Resulting records will display in alphabetical order by last name. The following primary information will display:

- Last Name
- First Name
- Application Location (with a ‘lightning bolt’ icon if completed electronically)
- Training Date
- Sex Offender Registry Date
- AF Date (with a ‘lightning bolt’ icon if completed electronically)
- CRR Date
- Other State CRR
- Other State CRR Date
- Fingerprint date

To view additional details on a specific Employee/Volunteer, click the down arrow at the far right of the row. Doing so will display the following data:

- Date of Birth
- Job Position
- Personnel Type
- Notes

Once the report has generated, two additional options will be available:

Export to CSV: This file can then be opened in Microsoft Excel where the data can be further manipulated.

Download to PDF: The PDF file can then be saved to the computer, emailed, and/or printed to hard copy.