

PARISH GUIDE

Safe Environment — How It Works

Getting certified to serve — VIRTUS training, background check, and certificate — in plain language.

A simple, step-by-step guide for parishioners and parish staff · Powered by Nave

The journey at a glance

Everyone who serves with children or vulnerable adults completes Safe Environment certification first. The parishioner works through a guided checklist; the parish office verifies the certificate and clears them. Nobody has to chase paperwork or wonder where things stand.



Two sides, one process. The parishioner sees a friendly checklist with a progress bar and a clear "next step." The parish office sees the same steps as a reviewable record — so what the volunteer is told and what the office tracks are always in sync. The renewal date is set automatically when they're certified.

Who does what

 **The parishioner / volunteer**

Starts their certification, completes the VIRTUS training and background check, signs the Code of Conduct, uploads their certificate, and submits — all from the parish website, on a phone or computer.

 **The parish office (staff)**

Reviews submissions, verifies the uploaded certificate, certifies the volunteer (which sets the renewal date automatically), and keeps the whole roster current — all from one screen.

The certification tracks

TRACK	WHO IT'S FOR	VIRTUS COURSE	RENEWS
Adult	Anyone 18+ who volunteers with or has access to children	Protecting God's Children 4.1	Every 3 years
Teen	Volunteers ages 13–17	Healthy Relationships for Teens 2.0	Every 2 years
Vulnerable-adult	Those serving the homebound, elderly, or vulnerable adults	Protecting God's Children + Vulnerable Adults (combined)	Every 3 years

Note: VIRTUS training and the background check happen on the diocese's own systems (VIRTUS Online and the LiveScan provider). Nave doesn't replace those — it guides you to them, then holds your certificate and tracks your status so the parish always knows who's cleared.

Part A • For parishioners

How a volunteer gets certified. You'll sign in to your parish account so your steps and certificate are saved in one place.

USE CASE 1 • START YOUR CERTIFICATION

Who: Anyone who wants to volunteer. **Goal:** Begin the right certification for how you serve.

1. Open the parish website and go to **Safe Environment** (it's in the footer, and there's a card in your member portal).
2. Read the short overview of who needs certifying and the steps involved.
3. Sign in, choose the **track** that matches you (Adult, Teen, or Vulnerable-adult), optionally note how you serve, and tap **Start certification**.

Result: Your personal checklist is created, with a progress bar and a clear "next step."

USE CASE 2 • COMPLETE THE TRAINING & BACKGROUND CHECK

Who: A volunteer in progress. **Goal:** Do the required steps and record them.

1. For each step, the checklist tells you exactly what to do and links you out — e.g. register at **virtusonline.org** and complete the ~50-minute training, or pick up the LiveScan form for your background check.
2. When you've finished a step, tap **Mark done** and note the date you completed it.
3. Acknowledge the **Code of Conduct** the same way.

Result: Each step turns green; your progress bar climbs as you go.

USE CASE 3 • UPLOAD YOUR CERTIFICATE

Who: A volunteer who's finished VIRTUS. **Goal:** Send the parish your proof of completion.

1. Download your **Certificate of Completion** from your VIRTUS account.
2. On the checklist, tap **Upload certificate** and choose the PDF or a photo from your phone.

Result: The certificate is stored securely and the step is checked off. Only the parish office can see it.

USE CASE 4 • SUBMIT FOR PARISH REVIEW

Who: A volunteer who's completed every step. **Goal:** Hand it to the office to verify.

1. Once all the steps are done, the **Submit for parish review** button turns on.
2. Tap it. The parish office is notified, and you get a confirmation by email.

Result: Your status shows **"Awaiting parish review"** — nothing more for you to do but wait.

USE CASE 5 · GET CERTIFIED & RENEW ON TIME

Who: A reviewed volunteer. **Goal:** Be cleared to serve, and stay current.

1. When the office verifies your certificate, you're **certified** and emailed — you'll see the date your certification is valid until (3 years for adults, 2 for teens).
2. We email you a reminder **30 days, 7 days, and on the day** your certification is due — so it never lapses by surprise.
3. When it's time, open **Safe Environment** and tap **Renew my certification**. Your checklist reopens — re-take the training, upload the new certificate, and submit for review again.

Result: You're cleared to serve, with a clear expiry, automatic reminders, and a one-tap path to renew.

Part B • For parish staff

Everything lives in one place — **Admin** → **Safe Environment**. It's visible to the pastor and parish staff only, because it holds sensitive information.

USE CASE 6 • WORK THE REVIEW QUEUE

Who: Parish staff. **Goal:** See who needs attention at a glance.

1. Open **Safe Environment**. A summary shows how many are certified, in progress, awaiting review, expiring, or expired.
2. The **Certification requests** list puts what needs you first — **awaiting review**, then **expired/expiring**, then in-progress.
3. Tap any person to open their case.

Result: You always know exactly who to act on next.

USE CASE 7 • VERIFY A CERTIFICATE & CERTIFY

Who: Parish staff. **Goal:** Confirm a submission and clear the volunteer.

1. Open the case. **View / download** the uploaded certificate and tap **Verify** (or **Reject**, which asks the volunteer to re-upload).
2. Tick each requirement **met** or **waived**. When the gating items are done, the **Certify** panel turns on.
3. Confirm the completion dates and tap **Certify & notify**. The renewal expiry is set automatically (3 years for adults, 2 for teens) and the volunteer is emailed.

Result: The volunteer is certified, the expiry is calculated for you, and the whole action is recorded in the activity log.

USE CASE 8 • REQUEST CHANGES OR REVOKE

Who: Parish staff. **Goal:** Send something back, or pull a certification.

1. If a submission isn't right, tap **Request changes** — it returns to the volunteer to fix and resubmit.
2. If a certification must be pulled (e.g. a failed re-check), tap **Revoke**, add a reason, and the person is notified to contact the office.

Result: The record stays accurate and accountable, with every change logged.

USE CASE 9 • TRACK RECORDS COMPLETED ELSEWHERE

Who: Parish staff. **Goal:** Record someone certified outside the portal.

1. Under **Manual records**, tap **Add a person** for a paper record or a diocesan transfer.
2. Enter their training and background-check dates and the expiry — they then show up in the same roster and counts as everyone else.

Result: One complete, current roster — no matter how each person got certified.

USE CASE 10 · REQUIRE CERTIFICATION BEFORE SERVING

Who: Pastor / office. **Goal:** Make sure only certified people serve where it matters.

1. In **Ministries**, tick "**Requires Safe Environment certification to serve**" on each ministry that needs it (e.g. anyone working with children or vulnerable adults).
2. On the **Safe Environment** page, turn on "**Require certification before serving.**" Switch this on only once your records are current, so you don't block your roster.
3. Now members **can't sign themselves up** to serve in a flagged ministry unless they're certified — they see a prompt to get certified instead. Staff can still assign someone when needed, but the dropdown flags them "**⚠ needs Safe Env cert**" and the assignment is recorded as an **override** in the Activity Log.

Result: Uncertified volunteers can't self-schedule into sensitive roles, and any staff exception is accountable.

Quick reference

Where do parishioners start?	The parish website → Safe Environment (in the footer), or the Safe Environment card in their member portal. Sign in to begin.
Does Nave do the VIRTUS training?	No. Training (VIRTUS Online) and the background check (LiveScan) happen on the diocese's systems. Nave guides you there, holds your certificate, and tracks your status.
Who can see my certificate?	Only the parish office. Certificates are stored securely and are not public.
How does someone become "certified"?	The parish office verifies the uploaded certificate and certifies them. Volunteers can't mark themselves certified — that's deliberate, for child-protection accountability.
How is the renewal date set?	Automatically when certified — 3 years for adults and vulnerable-adult ministry, 2 years for teens. The status flags "renewal due soon" before it lapses.
What happens when my certification expires?	You're reminded by email 30 days, 7 days, and on the day it's due. A Renew button reopens your checklist so you can recertify before — or after — it lapses.
Can we require certification before someone serves?	Yes. Flag the ministry in Ministries , then turn on enforcement on the Safe Environment page. Self-signup is blocked for uncertified members; a staff override is allowed but logged.
Where does staff manage everything?	Admin → Safe Environment . The request queue surfaces who needs review; open a case to verify and certify. Pastor & staff only.
What about people certified before, or elsewhere?	Add them under Manual records with their dates — they join the same roster and counts.

The big idea: one simple, guided path to certification. Volunteers always know their next step; the office verifies and certifies from a single screen, the renewal date is handled for them, and the parish keeps a current, accountable record of everyone cleared to serve.