DIOCESE OF SAN JOSE

Workday Instructions: How to Run a Volunteer Compliance Report

Overview: **How to Run the "Volunteer Certification – Active" Report in Workday**

Workday has the capability to provide Volunteer Coordinators with a Safe Environment Compliance Report. Upon running this report, Workday will provide users with "Contingent Worker" Background Check and Safe Environment training records in Workday. This report can then be exported as an Excel file.

The OPCVA recommends that Volunteer Coordinators run this report quarterly, or at the very least annually, in your efforts to maintain and ensure that your volunteers are in full compliance with diocesan and USCCB policies. Remember, training is required to be renewed every 3 years for all volunteers who work with youth and/or vulnerable adults.

Step-By-Step Guide: **How to Run the "Volunteers Certification – Active" Report**

1. **Login to Workday**
2. **Using the Workday search function, type in the report name "volunteers certification - active" and then click "Enter" on your keyboard.**

Note: As you type the report name, a dropdown menu will provide the report. You can select the report from the dropdown menu.

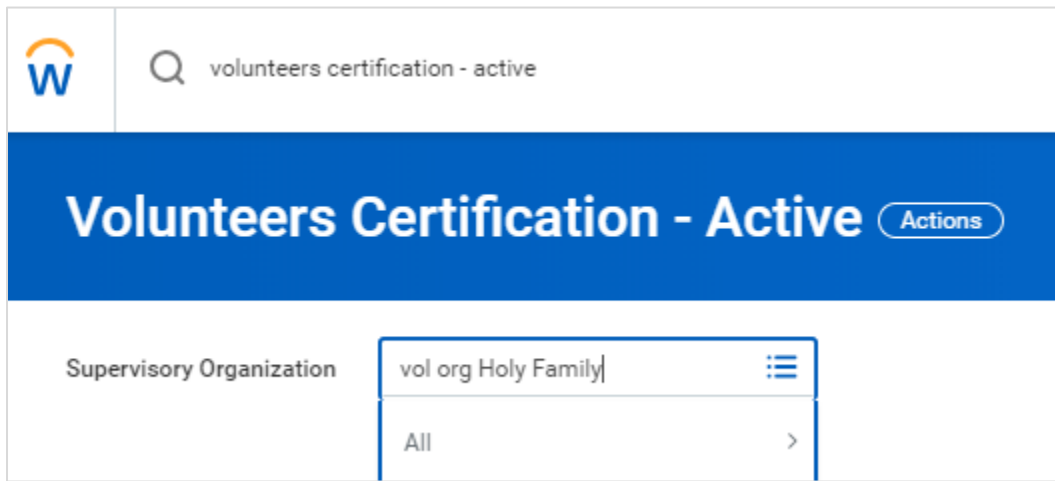3. **Select the report "Volunteers Certification - Active" from the search results:**

4. **Using the "Supervisory Organization" field, type in your Supervisory Organization. Include "vol org" when typing your Supervisory Organization into the associated search box, then click "Enter" on your keyboard. <u>Example:</u> Type "vol org Holy Family" > click "Enter" on keyboard.**
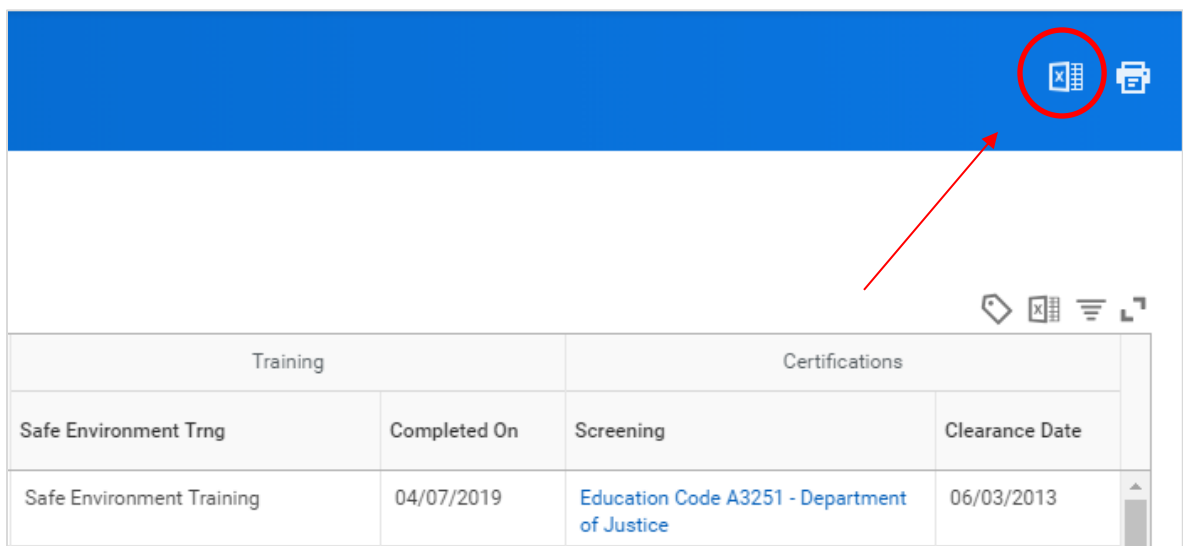

5. **Next, select your Supervisory Organization from the search results. Be sure to select the option that DOES NOT include the word "ALL" and then click the orange "OK" button at the bottom of the Workday screen:**
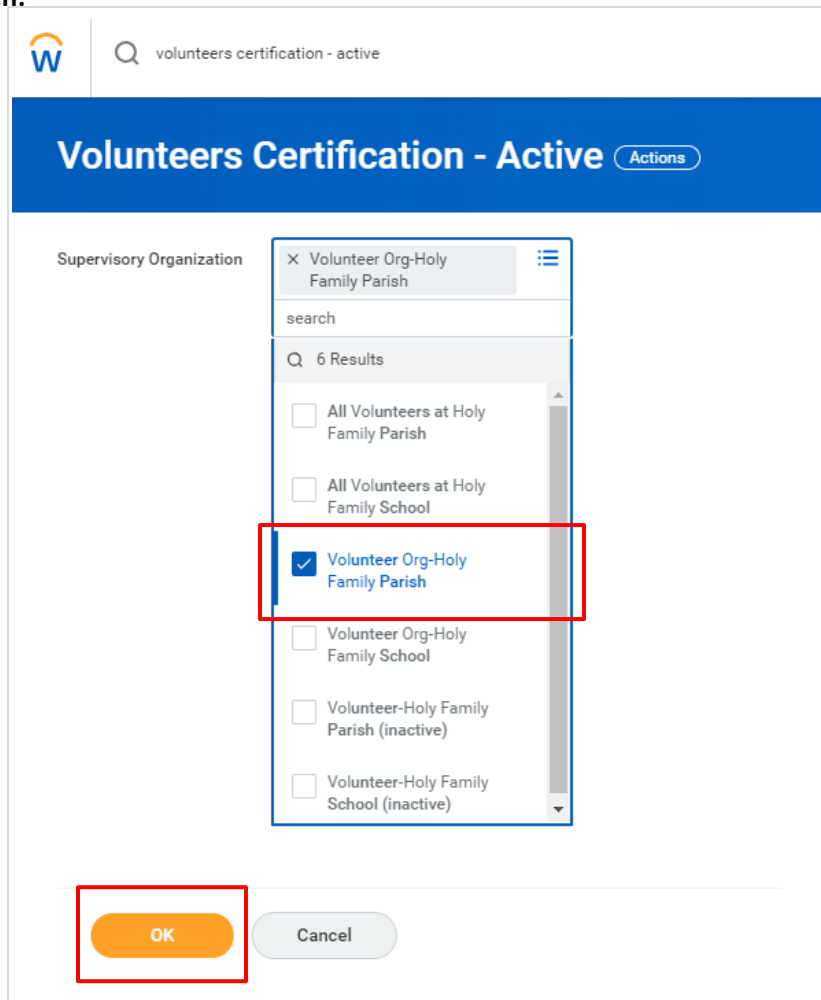
6. Once you click the orange "OK" button at the bottom of the screen, Workday will initiate the report processing. This may take a few minutes.

7. Once the report processing is completed, Workday will provide the following data report which will include the Safe Environment data for your parish/school volunteers in Workday.

Training		Certifications	
Safe Environment Trng	Completed On	Screening	Clearance Date
Safe Environment Training	04/07/2019	Education Code A3251 - Department of Justice	06/03/2013
Safe Environment Training	01/19/2019	Penal Code A4631 - Department of Justice - Department of Justice	09/25/2006
Safe Environment Training	09/08/2015	Penal Code A4631 - Department of Justice - Department of Justice	06/01/2009
Safe Environment Training	09/15/2016	Education Code A3251 - Department of Justice	12/18/2012
Safe Environment Training	03/27/2017	Education Code A3251 - Department of Justice	12/18/2012
Safe Environment Training	11/03/2018	Penal Code A4631 - Department of Justice - Department of Justice	03/30/2007

8. Once you have run the report, you will be provide with all volunteers assigned to your Supervisory Organization. The report will include the volunteers "Safe Environment Training" and the training "Completed On" date (Note: training is required every 3 years from date of completion). The report will also provide the background check verification, and will be listed as "Screening" along with the screening "Clearance Date".

9. If you would like to export the report to Excel, click on the Excel icon next to the printer icon in the top right-hand corner:

Training		Certifications	
Safe Environment Trng	Completed On	Screening	Clearance Date
Safe Environment Training	04/07/2019	Education Code A3251 - Department of Justice	06/03/2013

10. If you need further assistance, please contact Anthony Gonzalez at 408-983-0113. Thank you.