



Workday Instructions: How to Update/Edit Safe Environment Training Data for a Volunteer

Overview: How to “Edit” (or Add) Safe Environment Training Data in Workday

Volunteers who work with youth or vulnerable adults must be accounted for in Workday - the Diocesan Compliance Database. Safe Environment training documentation is a requirement for service within any youth or vulnerable adult serving ministry. The required training data is tracked within each volunteer’s Workday profile and must be renewed every 3 years as long as they remain active in ministry. The follow guide provides step-by-step instructions to assist you when you need to update or “edit” the volunteer’s training data.

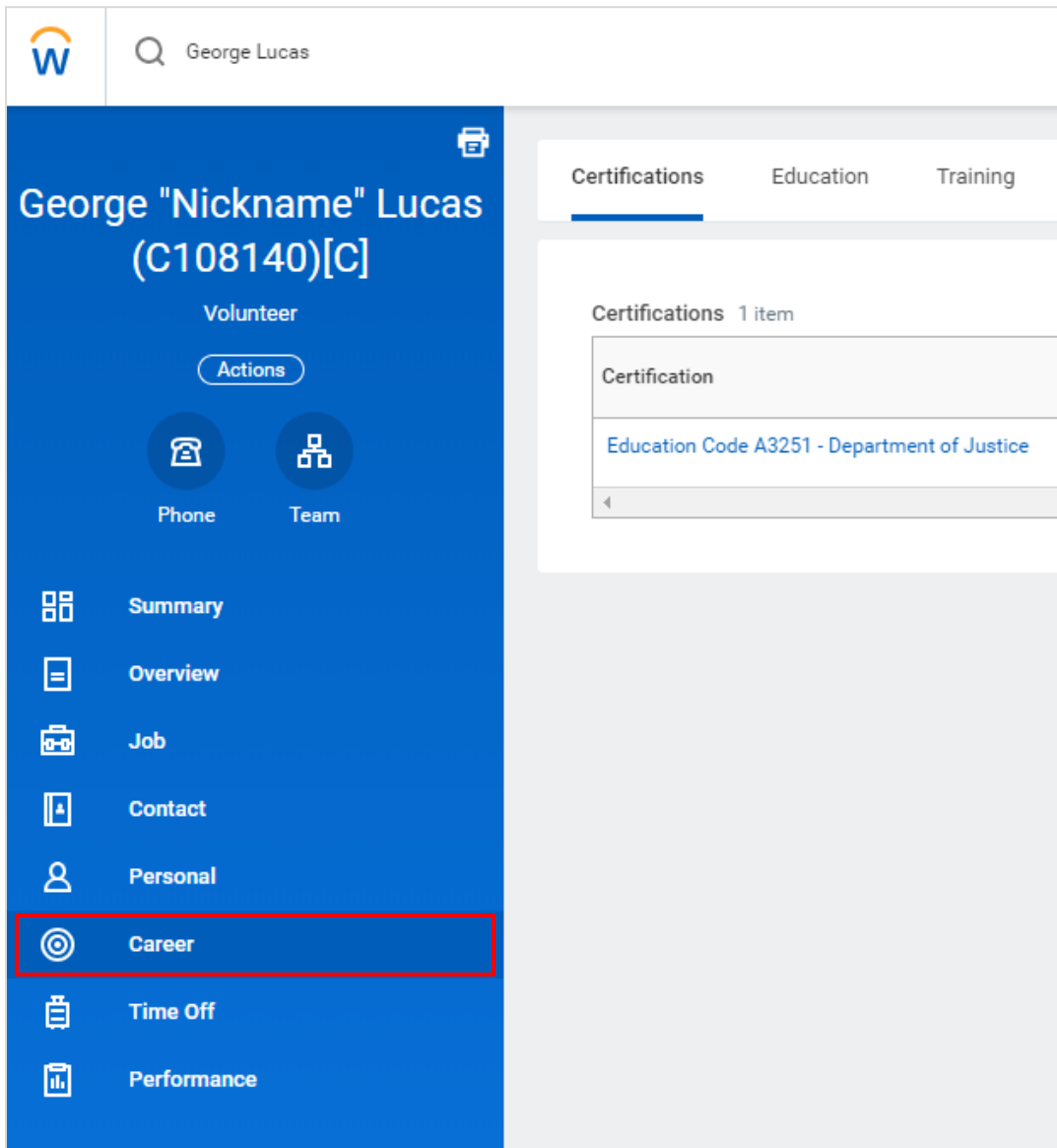
Step-By-Step Guide: “Edit” Safe Environment Training Dates

1. Login to Workday.
2. Using the Workday search function, type in the volunteer’s name to access the volunteer’s Workday profile. You can access the volunteers profile by using the dropdown menu options that will populate as you type in the name, or you can hit “Enter” on your keyboard and Workday will provide you with related search results.

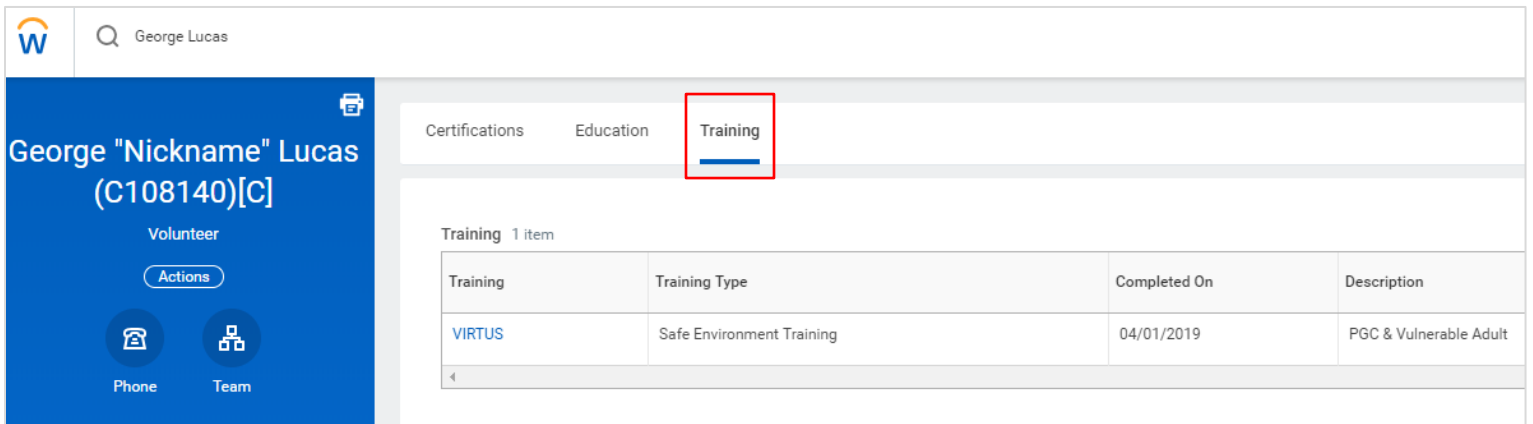
Dropdown menu option will populate as you type, or hit “Enter” on your keyboard after you type in the name to select the volunteer profile from the search results to access the volunteer profile.

3. Once you access the volunteer’s profile, you will need to navigate to the “Career” section. To do this, locate “Career” in the blue left-hand column under the volunteer’s name and click it to activate the option (image can be found on next page).

(Image for Step 3)

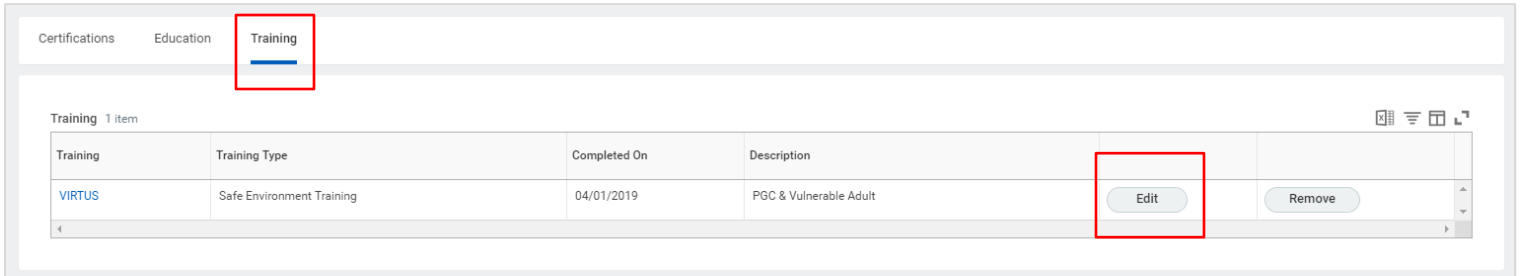


4. Next, you will select the "Training" tab by clicking on the word "Training" located on the right-hand side of the volunteer's name.



Workday Instructions: How to “Edit” Safe Environment Training Data in Workday

5. Once you have navigated to the “Training” tab within the volunteer’s profile, you will now have access to “Edit” the training data. The “Edit” button will be to the right of the “Description” field.



6. Click the “Edit” button to access the training data. You will then be prompted with the follow screen.

The screenshot shows the 'Edit Training' form for George "Nickname" Lucas (C108140)[C]. The form has a blue header with the title 'Edit Training' and the user's name. Below the header, there is a section for 'Instructions for entering Company Required Training' and 'Instructions for entering Teacher Semester Units Beyond a Bachelor's Degree'. The form fields are as follows:

- Training:** A text input field containing 'VIRTUS'.
- Training Type:** A dropdown menu with 'Safe Environment Training' selected.
- Description:** A text area containing 'PGC & Vulnerable Adult'.
- Completed On:** A date input field containing '04 / 01 / 2019', highlighted with a red box.
- Training Duration:** An empty text input field.
- Comment:** A text area with the placeholder text 'enter your comment'.

At the bottom of the form, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'.

Look for the “Completed On” date field. This is the field you will want to “Edit” with the updated completion date. The Safe Environment completed on date should reflect the most recent training date.

Workday Instructions: How to “Edit” Safe Environment Training Data in Workday

Note: The “Training” field should reflect the current training program (VIRTUS), and the proper course description. “Description” is where you would indicate if they volunteer fulfilled the youth protection course, vulnerable adult course or a combined course.

7. Once you have updated the “Completed On” date with the most current training date, and updated any other necessary information, you will complete this process by click the orange “Submit” button at the bottom of the screen.

Additional Information: How to Add Safe Environment Training Data to a Profile for the First Time

If you need to **ADD** Safe Environment training to a profile for a volunteer who does not have training documented in Workday, you will access the “Training” tab as outlined above in the previous steps. Instead of using the “Edit” button, you will use the “Add” button located at the bottom of the screen.

The screenshot shows the Workday interface for a volunteer profile. The top navigation bar includes tabs for Certifications, Education, Training (selected), Job History, Internal Projects, Languages, and Professional Affiliations. The left sidebar contains a menu with items: Summary, Overview, Job, Contact, Personal, Career (highlighted with a red box), Time Off, and Performance. The main content area shows 'none entered' under the Training tab. At the bottom of the page, an 'Add' button is highlighted with a red box, and a red arrow points to it from the right.

Specific Instructions on Next Page.

Instructions for the Required Training Data Fields

Click the “Add” button to access the training data. You will then be prompted with the same screen as that found in **Step 6** (on page 3 of this document). All fields in the training data will be blank. You will follow the on-screen instructions to fill in the required training data. The following should be input into the correlating fields in this section:

- “Training” - add “VIRTUS” or “Shield the Vulnerable” if training was completed in 2017 prior to October of 2017
- “Training Type” - select “Safe Environment” from the options available
- “Description” - add the training course completed: youth protection, vulnerable adult, or combined course
- “Completed On” - enter the date the training was completed on
- Click the orange “Submit” button to complete this process

CONGRATULATIONS – VOLUNTEER SAFE ENVIRONMENT TRAINING DOCUMENTATION COMPLETE!

The Office for the Protection of Children & Vulnerable Adults is happy to provide additional guidance or training upon request. For additional assistance or questions, please call 408-983-0113. Thank you.