# Record management features in PACS in relation to Working with Children Checks, Criminal History Record Checks (Police Checks) and Training

## Prepared by Catholic Archdiocese of Melbourne IT Facilities and Services

There have been significant changes in Victoria in relation to the safeguarding children, young people and vulnerable persons since PACS was first produced in the mid-2000s. While the developers have introduced features to manage volunteer and employee records relating to Working with Children Checks (WWCC), Criminal History Record Checks (Police Checks) and training over the past few years, the documentation has not been updated to reflect best practice. This information is intended to provide guidance for parishes in relation to creating and maintaining accurate records

The Victorian Child Safe Standards and recommendations from the Royal Commission into Institutional Responses to Child Sexual Abuse reflected in the National Principles for Child Safe Organisations highlight the importance of keeping records that demonstrate that appropriate due diligence is undertaken in relation to those engaged in ministry or work.

The creation and maintenance of accurate records and sound record keeping practices support accountability in relation to our commitment to safety of children, young people and people experiencing vulnerability. Retaining records also helps to protect those engaged in ministry or work within our parishes.

# Some key principles

The overriding principles when handling data relating to clergy, volunteers and employees are to ensure that you keep accurate records, stored in a secure manner and **never delete any records** which may be required years into the future that may relate to promoting safety e.g. WWCCS, Police Checks, training records.

In short, don't delete or overwrite any records or details which will show that the parish undertook its due diligence at the time the member of the clergy, employee or volunteer was involved in the parish.

For example:

- Rather than delete, **Archive** a family or member when they leave the parish.
- **Untick Active** if the person is no longer involved in a ministry, and make sure both start and end dates are recorded accurately. Even if you don't know the start date, it's still important to record the end date.
- Don't overwrite former WWCCs, Police Checks or training records with new ones, without ensuring first that you have saved a record of the previous check in a note.

# Private tab on the Member or Staff record

## **Recording WWCCs, Police Check and Training Information**

Information in relation to WWCCS, Police Checks and training is recorded for employees and volunteers on the **Private** tab to ensure access to this information can be restricted in PACS security settings.

cilia Per	eza		25-Nov-2019 1
Giver			
نi		Envelope Number	User Fields Notes
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rchive	Greeting		Smith, Joe 07/10/2019 Mon
	Cecilia		
to Family			Volunteer Course
			Name Completed Date Expiry Date

#### Working with Children

- Card number, taken from the card or letter from the Department of Justice. Renewed cards have -01, -02 etc after the original number. Make sure that you transfer expiry date, card type and verification details for the previous check into a note before updating this information for a renewed check. Enter Registration number here if the card type is a VIT Membership
- Card expiry, taken from the card or letter, or the VIT check site: <u>https://www.vit.vic.edu.au/search-the-register</u>
- Card type select from the drop down list. Note that it can change with renewals if the volunteer's employment circumstances change. Select VIT Registration for registered teachers without a WWCC (If it's not on the list, right click>Edit>Add)
- Application status: Pending or Issued. The first time you submit an application, most of these fields will be blank until the check has been issued, but in the meanwhile, mark it as Pending.
- Verified By drop down list of staff members, to record who verified the check. If a staff member is not on the list, right click>Edit>Add their details
- Verification Date date the staff member verified the check
- ID Details the document sighted by the staff member to confirm the person's identity

## **Criminal History Check**

Criminal History Check **Type** – if you haven't already, right click>Edit>Add and enter the types of check required as list options, including VIT Registration. Relevant options from Victoria Police's *Consent to Check and Release National Police Record* Application Form are:

- Contact with Children
- Adult Aged/Disabled Care and
- Other e.g. Counters, Finance Committee

If the person is involved in a number of ministries requiring different types of check, Contact with Children should be selected in the drop down box, and details for the Contact with Children check entered on the Private tab (this screen). This check will appear on your Criminal History Check reports.

If they have any additional checks (e.g.: Counters), enter details on the Notes tab, [each in a separate] note. See **Notes Tab** section, below. Make sure you enter the expiry date as a follow up date, so that a **Note - Follow Up Due Date** reminder will come up 7 days before it's due to expire.

- Criminal History Check Authorised Date date on check/certificate, or initial VIT Registration Date for a teacher.
- Expiry Date expiry date of check: add 3 years to the authorised date, according to the CAM PSU guidelines, or enter VIT Registration expiry
- Verified By drop down list of staff members, to record who verified the check. If a staff member is not on the list, right click>Edit>Add their details
- Verification Date date the staff member verified the check

#### Adding Code of Conduct declaration in PACS

1. Add detail to the Volunteer Courses section of the Private tab on a Member record, including Expiry Date.

Volunteer Course		
Name	Completed Date	Expiry Date
Code of Conduct Declaration signed	29/07/2020	29/07/2023
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It's not possible to add a reminder for Code of Conduct Expiry Dates, but you can produce a report from an Enhanced Export, and sort it by Expiry Date. It takes a few minutes to set up the export, but once it's saved, only a few seconds to run each month..

2. Go to People>Export>Enhanced Export. Expand the Member folder. Select First Names, Last Name, Working With Children Check Card and Active.

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	Enh	anced Export:	(New)					
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		Title						
1		First Names						
		Middle Name						
		Last Name						
		Preferred Name						
		Maiden Name						
		Marital Status						
		Sex						
		Date of Birth						

3. Expand the Volunteer Course folder, and select Name, Completed Date and Expiry Date.

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🛛 🔁	Volunteer Course					
$\boxtimes$	Name					
$\boxtimes$	Completed Date					
$\boxtimes$	Expiry Date					
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4. Click on Filter. Take particular note of the brackets and % wild cards. Click on OK, then Preview

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		Pmember Active	equals	Y	)	AND
		(Pmembervolunteercourse Name	like	%Code%	)	
	_					
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				JUILLISE		NULLE

5. In Preview mode, click on the Sort button. Then drag the Expiry Date to the panel at the right, and click OK.

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	Pmembervolunteercourse Expiry Date
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	Reorder sort columns using drag and drop feature
	·
-	Drag and drop columns to specify a sort order Clear OK Cancel
_	Sort List Number of Records: 1 Preview Filter Sort Export Merge Exit

6. Click on Export, give the file a name, leave the file type as Excel 97 with headers. You'll be asked if you want to save the export definition. Click on Yes. Call it Code of Conduct by Expiry Date. Leave the folder blank.

1		07/10/2019 Mon	Code of Conduct (U)	-
	Save As		×	
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١Ċ	Child Safe Parishes w	orkshod 07/10/2019	M. Completed Date	

- 7. The next time you want to run the report, just go to People>Export>Enhanced Exports> click on the binoculars, select the export, and click on OK. Preview, and then Export again.
- 8. Note that you can use this to produce a report for all Volunteer Courses, if you leave the last line out of the filter in Step 4

#### Volunteer Course (Training)

Any number of courses can be entered as required with details of the Name of the course, Completed Date and Expiry Date.

The Name of course is entered as text, and is the only required field. Some courses don't expire, so you can leave that field blank.

If a course has been repeated, keep details of earlier completions: don't delete or overwrite details.

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Vorking	g with Chi	ldren					
Chec	k Card						
Card Nur	mber		Card Expir	u			
123456	598987		20/11/2	) 19 Wed			
Card Typ	e		Applicatio	n Status			
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# When a parishioner withdraws from one or more parish ministries, leaves the parish or is deceased

• Untick **Check Card** on the **Private** tab if they are no longer involved in <u>any</u> parish ministries.

cilia Per	reza								25-Nov	2019 12:0
Giver										
Add		S. De Number	User Fields	Notes						
View	Full Name Cecilia Pereza	36	Group Mo	ore Privat	e Sacra	aments	Ministries	Pledge	Given	Photo
)Edit	Date of Birth Age Giver									
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	Remarks Group		· · ·							
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	Mrs Perez		Verified By			Verificati	ion Date			
	Greeting		Smith, Joe			07/10/	2019 Mon			
Irchive	Cecilia									

 Go to the Ministries tab. enter an End Date and untick Active for each ministry, then Save. <u>Do</u> not select the ministry "row" and hit the delete key.

	Envelope Number	Group	More	Private	Sacraments	Ministries	Pledge	Given	Photo	User Field	s Notes			
	600		N	ame	Start Date	,			Location	Sta	t time End Time	Leader	Interested	<u>antine</u>
Giver		Child	dren's Liti	urgy	07/10/2019	06/03/20	20	St Mary's	Church					
Debtor		Euch	haristic M	inister	13/10/2019			St Mary's	Church					
Organisation		→ Pari	ish Finan	ce Committe	12/03/2018			St Mary's	Church					
•														

You can do the same thing from the People>Ministries screen. However, regardless of what the
PACS documentation or training notes say, <u>do not click on **Remove**</u> to delete them from the
ministry! Even if a Ministry is discontinued in your parish, follow this for each volunteer listed in
that ministry: <u>never click on **Remove All**</u>.

- Ministries						- • •
Members/Staff	Ministry					
🚛 🕨 Families	Children's Liturgy		✓ Clear M	nistry		
Members	Name	Start Date E	End Date L	ocation Start	End Leader	Interested Active
	MANCINI Louis	07/08/2019	St Mary's	Church		
	PEREZA Cecilia	07/10/2019 06/0	03/2020 St Mary's	S Church		
	SCAPPINI Rita	07/10/2019	St Mary's	Church		
	<					>
		Acti	tive Only 🗌 Include [	eceased Member		Record 2 of 3
		Rep	oort 👂	ve Rev Al	Undo S	ave Exit

# Photo tab

# Adding photos

It is possible to add a photo of the person's latest WWCC to their record, but if you want to retain it, keep a copy in a note (see next section). You can only have ONE photo added to a person's record: you will lose the previous photo as you add a new one. Photos on the Photo tab or in Notes must be located on the T: drive, or other Parish staff will not be able to see them.

# Notes tab

## Adding documents to a volunteer record

## Refer to Quick Answer (QA) 9. Using notes in PACS and QA 98. How to add attachments in PACS

Set up a Child Safety Notes category. Click on Security to block access to the Delete button for Child Safety Notes for all other users but ADMIN.

If you have not already done so, set up SMS and Email note categories, so that when you tick **Record** as **Note in the SMS Centre and Email Centre**, the message or email is saved in Notes. Unless the appropriate categories are set up, they'll be saved, but can't be viewed.

Set up a Child Safety folder on your T: drive to store documents and images. You can create a note either with or without content, and a **Link** to a document stored on your T: drive. If you store the document elsewhere, other Parish Staff will not be able to view it.

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		Courses Murchas	Group	More	Drivate	Sacrame	ste Ministria	c Diadoa	Given Photo	
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I've added a sample image from the T:\Training Account\PACS Child Safety documents folder

-	Note Links	×
	Name     Folder       T:\Training Account\PACS Child Safety documents\Sample	OK Undo Cancel
1		

To open the link from the notes tab, click on the purple arrow. You don't need to open the note.

ni												
	Envelope Number	Group	More	Pri	Sacraments	Ministries	Pledge	Given	Photo	User Fields	Notes	
me Mr Louis Mancini	24	Alert	XI		Date	Grou	IP		Sul	bject	Alumbar	Note
1995 Tue 24 Male Debtor					7-Aug-19 Cr	ILDSAFETT		VITRE	gistration		Number	1235466967, issued 01/11/2017, exp 31/10/2015
r Address												
umbers or E-Mails (1) 0455 774 855												
tatus Religion												
Group												
Team												

# **Reports and Exports**

These are 2 almost identical **REPORTS** which list most of the information you will need in relation to WWCCs and Criminal History Checks.



Benzinder List		(Larring and the	
Working with Children Check Listing Select By Type of Card From Card Exry From Mi Dis/12/2019 Wed Member Staff Include Archived/Ucceased People Both Members with Interested Ministry Only Members with Active Ministry Only Show Address	nistry Select All Deselect All Children's Liturgy Charistic Minister Arish Finance Committee Readers	Criminal History Check Listing Criminal History Check Listing Check T  From To From 18/12/2019 Wed  Member Staff Members with Interested Ministry Only Both Members with Active Ministry Only Show Address	Ministry Select All Deselect All Children's Liturgy Eucharistic Minister Parish Finance Committee Readers
Sort By Name OType of Card OStaff Type	Print 🥨 Preview Exit	Sort By Name Ocheck Type Ostaff Type	Print 🥨 Preview Exit

For a list of expired or expiring checks, leave the Expiry Date From field blank. To include **all people in selected ministries**, whether or not their Check has expired, delete the Expiry Date To field data.

## To EXPORT data to an Excel spreadsheet, or for a mail merge, go to

#### **People>Export>Ministry Export**

Ministry Export																						
Ministry Expor	t																					
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Ministry Select All	Deselect All	Children's Liturgy			Cecilia	Pereza			07/10/2019		St Mary's Church					мБ	3 1	12345698987	20/11/2019	Volunteer	Issued	Smith 3x
Children's Liturgy		Eucharistic Minister			Ceclia	Pereza			13/10/2019	20/11/2019	St Mary's Church					м [		12345698987	20/11/2019	Volunteer	Issued	Smith Jk
Eucharistic Ministe	r																					
Parish Finance Cor	mmittee																					
Readers																						

## OR People>Export>Enhanced Export>Member folder

	Member	^
	Personal Pronouns	
	Title	
	First Names	
	Middle Name	
	Last Name	
	Preferred Name	
	Maiden Name	
	Marital Status	
	Sex	
	Date of Birth	
	Country of Birth	
	Work Phone	
	Mobile Phone	
	Email	
	Ethnicity	
	Religion	
	Occupation	
	Employer	
	School	
	Year	
	Language Background	
	Remarks	
	Group	
	Role	
	Team	
	School Reference	
	Mass Centre	
	Raffle Booklet	
	Working with Children Check Card	
	Working with Children Card Number	
	Working with Children Card Expiry	
	Working with Children Card Type	
	Working with Children Application Status	
	Working With Children Verified By Staff	
느느	Working With Children Verification Date	
님		
	Criminal History Check Type	
	Criminal History Check Authorised Date	
	Criminal History Check Expiry Date	
	Criminal History Check Verified By Staff	
	Criminal History Check Verification Date	

OR People>Export>Enhanced Export>Volunteer Course folder



# Reminders

Go to Maintenance> Setup> Reminder Dates> Available Events to set up reminders. Click and drag from **Available Events** at the bottom of the screen to **Selected Dates**, and then set an **Activation Interval** of 30 days for expiry dates, and 7 days for Note – Follow Up Due Date

- Member Criminal History Check Expiry Date
- Staff Criminal History Check Expiry Date
- Member Working with Children Card Expiry Date
- Staff Working with Children Card Expiry Date
- Note Follow Up Due Date
- For all of these events, ensure that you **tick Keep Reminding After Event Date.** It's extremely important that you are still reminded after the expiry date if the check hasn't been updated.

	Member - Criminal History Check Exp Activation Interval 30 🚖 days	Save Exit
	Activation Interval 30 🚖 days VKeep Reminding After Event Date	Exit
•		
M.		
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This is what the reminder looks like:



Tick **Show reminder list on startup**. Any other time you want to open the Reminder list, go to Maintenance>Reminder List.

# **Useful documents on Secureshare**

On your POL desktop, click on the Online Help link, or go to <u>https://secureshare.org.au/OLH</u>, enter your POL username and password, and click on Quick Answers.

*QA 006. Working with Children Check guide* – food for thought about why and how you would handle non-parishioners' child safety data

QA 009. Using notes in PACS

QA 98. How to add attachments in PACS

QA 106. How to save emails & SMS as notes in PACS

QA 111. Working with Children Check report

PACS Installation Guide (pages 34-42 Setting up security for PACS User accounts)

PACS Family & Members User Guide (pages 70-77 Using Notes)

*Enter an Email address per login in PACS* (particularly useful for directing replies to SMS and emails sent by the Child Safety Officer)



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