

## TABLE OF CONTENTS

Overview – Team Roles and Certification Process	3
Certification	5
• Outline of Certification Process	6
• 90 Day Deadline	8
Tasks and Procedures for SRAs	9
Getting Your Safeguarding Team to Work Together	11
How to Log in to Safeguarding Records System (SRS)	12
• English or Spanish Option	15
• Editing your Personal Information	16
Identifying Applicants and Starting their Certification Process	17
• Search People	18
• Add Person	20
Certification Status Check	22
• Decertify	24
• Upload Note/Document	24
• Print Certificate	25
• Email Certificate	25
Start Certification Process	27
How to Track the Certification Process in Work in Process or Applicants Tab	31
If the Certification Process Reveals a Conviction	35
• Interview	35
❖ Interview Procedures	35
❖ Interview in SRS	37
❖ Delegating and Un-delegating an Interview	39
❖ Filling Out the Interview Form	40
❖ SGC Interview	42
❖ SGP Interview	43
❖ Approving the Interview	44
• Applicant Invitation Email (Application & Background Check Release)	46
❖ Applicant Invitation Email - SGC	46
❖ Applicant Invitation Email - SGP	47
❖ International Addresses	48
• Application Review for Approval	49
• Application Final Approval	56
• Background Checks	57

## SAFEGUARDING RECORDS SYSTEM (SRS) MANUAL

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• Reference Checks	60
❖ Delegating Reference Checks	62
❖ Un-delegating Reference Checks	63
❖ Completing Reference Checks	63
❖ Reviewing Reference Checks for Approval	66
Training Sessions	68
Training Only Option for SGC or SGP-E	69
Training Only Procedures	71
Virtual Trainings	73
Vestry/Board Policy Review	75
Safeguarding God's People – Harassment Certification Process	77
Recertification for SGC or SGP-E	81
Recertification for Anyone Who is Certified in the Full Process in SRS and Expiring in the Current Year	82
Changing Applicant Certification Affiliation	91
Credit Checks and Driving Checks	91
Conditional Certification	91
Notifications for SRAs and Trainers	91
EDOT Safeguarding Policies	92
<b>Linked Documents:</b>	
• <a href="#"><u>Safeguarding Interview and Reference Questions</u></a>	
• <a href="#"><u>Trainer Instructions for SRS</u></a>	
• <a href="#"><u>Three Steps in the Safeguarding Process</u></a>	
• <a href="#"><u>Background Checks SRA - Help Sheet</u></a>	
• <a href="#"><u>Background Checks in Safeguarding</u></a>	

## OVERVIEW

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In 2012 the Diocesan-wide Safeguarding Records System (SRS) was introduced as a paperless system for all Safeguarding Records. This interactive software allows you to track all facets of the certification processes for Safeguarding God's Children (SGC) and Safeguarding God's People (SGP). All records will be held inside the system electronically and will be held forever.

## SAFEGUARDING TEAM ROLES

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1. Head of Congregation/School/Organization – Holds ultimate responsibility for knowing and implementing Safeguarding policies at their location. The implementation responsibilities may be delegated. They may be consulted by the SRA when decisions are needed to resolve issues that come up during the certification process. It is their responsibility to relay the information to an applicant or volunteer when not recruited or decertified.
2. Applicant – The person who requires certification. After being interviewed, the applicant will receive an instructive email. The Applicant then uses the system to complete an application, gives permission for a background check and provides references, and at the same time can register for the required training. At the training the Applicant signs a Sign-Out Sheet/ Acknowledgement Form, and upon certification can print their own certificate.
3. Safeguarding Records Administrator – SRA – Has access to all records for a particular location. The SRA will start the certification process for SGC and/or SGP, review the interview, application and reference responses, and results of background checks for approval. The SRA has access to reports to show who is certified and who is in the process of being certified. (No need for printing certificates or keeping paper files.) The SRA works closely with the Rectors/Heads of Schools or Organizations, Trainers, Ministry and Program Leaders and Applicants.

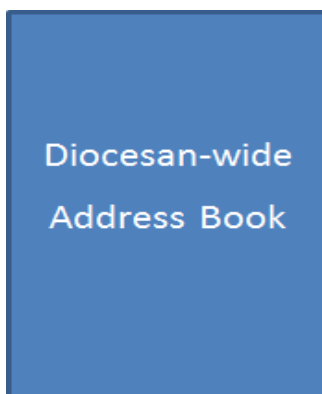
4. Ministry or Program Leader – Determines if a person needs certification, and if they have been known by Ministry or Program Leader and/or others for at least 6 months. The Ministry or Program Leader provides the person's name and email address to the SRA to start the certification process. The Ministry or Program Leader may be delegated interviews and reference calls and will receive an email with a direct link to enter the answers into SRS directly.
5. Trainer – Enters trainings, conducts trainings, signs and uploads Sign-Out Sheet/Acknowledgement form to confirm the attendance and the completion of the training.
6. Safeguarding Coordinator – Keeps well versed and up-to-date in Safeguarding policies and assists in compliance. This person makes sure the policies are being followed, ensures the organization has sufficient trainers and that appropriate SGC and SGP certifications are maintained.
7. Safeguarding Office – Has access to everyone's records and will provide final approval.

### THINK OF SRS AS HAVING 3 DISTINCT PARTS

- Search People - Diocesan-wide Address Book
- Work in Process - Certification Process and Documentation
- Training Sessions - Calendar of Training Sessions and Registrations

*Everyone who is being certified  
will have actions taken in each of the three sections.*

#### Search People



#### Work In Process



#### Training Sessions



## CERTIFICATION

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### REQUIREMENTS:

First time certification for Safeguarding God's Children (SGC) and Safeguarding God's People (SGP-E):

1. Personal Interview
2. Applicant completing and providing the following in SRS:
  - Application
  - References – 4 required
  - Release for Nationwide Criminal and Sex Offender Registry Background Check
3. Attendance at the 2 hour Safeguarding training in person
4. Signed Sign-Out Sheet which includes an Acknowledgment/Code of Conduct

Certification for Safeguarding God's People – Preventing Sexual Harassment (SGP-H):

1. Watching the SGP-H video
2. Having a paper copy of the SGP-H policies in hand during the video for reference and review
3. Signed Acknowledgement form turned in to SRA

### BRIEF OVERVIEW OF THE SGC AND SGP CERTIFICATION PROCESSES:

The SRA and the SGC and/or SGP trainers should be in contact with each other so that the appropriate training is posted to Training Sessions in SRS. This way the training session will be available for the applicant when the certification process is started. The Safeguarding Office will approve the training session after it is entered. If a process is not complete in 90 days, it will be stopped by the system and the certification process will have to be started again.

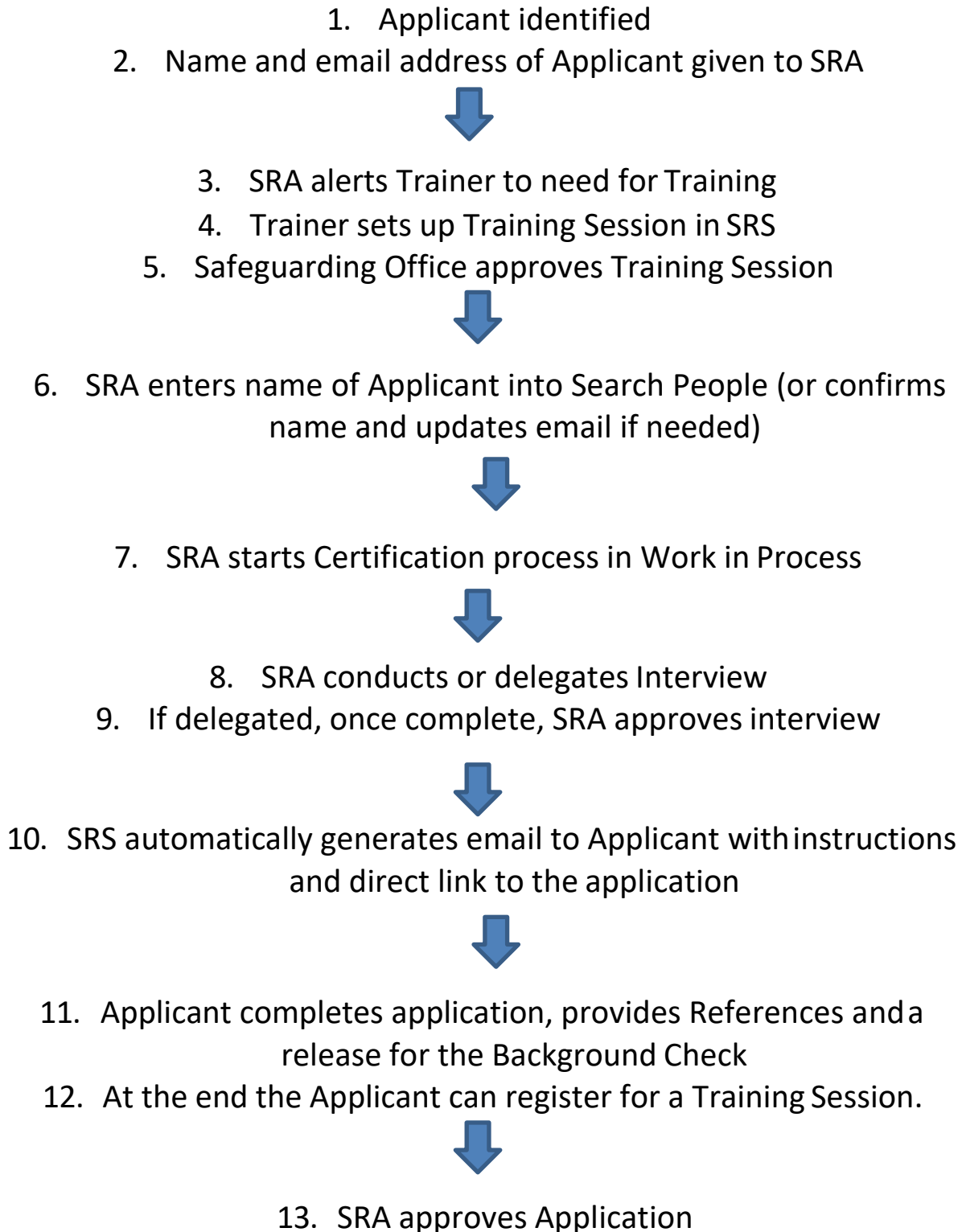
1. Start – SRA enters Applicant into system.
2. Interview – conducted by Ministry or Program Leader, person designated by SRA or the SRA; applicant's answers entered directly into the system by the interviewer and approved by SRA
3. Application – completed by the Applicant, with each section reviewed and approved by SRA. Applicant may register for training at this time. This is the only time the applicant is required to access SRS.
4. Background Checks – are generated and uploaded to the system automatically. Billing is processed through the diocesan treasurer's department. The results are reviewed and approved by the SRA.
5. Reference Checks – are conducted by a Ministry or Program Leader, person designated by SRA, or approved by the SRA.
6. Training – trainer posts date/time/place; Applicant signs up using the system and attends; trainer uploads Sign-Out Sheet to SRS; Safeguarding Office reconciles registrations and Sign-Out Sheets and approves training for attendees.

When all is complete, the applicant will receive an email that they are certified. The certification may be viewed by applicant and SRA at this time and printed if needed.

***All of the above will be entered and stored electronically in SRS.***

### OUTLINE OF CERTIFICATION PROCESS

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14. SRS automatically orders a Background Check and provides access to the References to the SRA



15. Trainer prints Sign Out Sheet/Acknowledgement Form, conducts training



16. Applicant attends Training Session (not dependent on Background Check or References being complete)



17. Trainer Uploads Sign Out Sheet to Training Sessions Calendar



18. Safeguarding Office gives credit for the Training Session



19. SRA approves Background Check



20. SRA conducts and/or delegates Reference Checks



21. SRA approves References



22. Applicant is notified that their certification is complete

### 90 DAY DEADLINES FOR ALL CERTIFICATIONS

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- All certification processes in SRS must be completed in 90 days.
- The SRS system will deactivate any incomplete applicant processes after 90 days from the initial certification start date.
- The SRA will see notifications that look like this: **Due Date: 2020-09-29** at various stages of the process in SRS. The applicant will also see this notification during the application process.
- The SRA will also receive daily SRA Activity Reports shows pending certifications that will be deactivated if not completed in 15, 30 and 60 days.
- Once an applicant's certification has been deactivated, applicants will be required to start their certification process again.
- That said, the SGC and SGP policies still hold:
  - SGC Certifications should be completed within 30 days of hire or volunteer start date.
  - SGP Certifications should be completed within 90 days of hire or volunteer start date.
- *It is extremely important that Sign-Out Sheets are uploaded within two business days after a training to reduce unnecessary deactivations.*



### TASKS AND PROCEDURES FOR SRAs

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As the Safeguarding Records Administrator (SRA) for your congregation, school or organization, you have several responsibilities and a variety of tasks.

#### Responsibilities:

Be thoroughly familiar with the Safeguarding Record System (SRS)

- Support and assist individuals who use or work with SRS
- Maintain the integrity of SRS by never sharing your login and password with anyone
- Complete SRS tasks in a timely manner to facilitate applicants' certifications (90 day deadline)
- Notify the Safeguarding Office when you retire as SRA (If possible, train new or assistant SRA in the use of SRS)
- Notify the Safeguarding Office of problems or questions related to SRS

**TIP:** You have an assigned specialist in the Safeguarding Office that can be reached to answer most of your questions. Never hesitate to email or call for help.

#### Tasks:

- **BEFORE YOU BEGIN ENTERING APPLICANTS FOR CERTIFICATION:** Meet with your Rector/Head of School or Institution, Safeguarding Coordinator, Ministry Leaders/Interviewers and Safeguarding Trainers to be sure they understand their roles and tasks in the Safeguarding process through SRS.
  1. For those conducting interviews and reference checks
    - Link: [Safeguarding Interview and Reference Questions](#)
  2. For trainers
    - Link: [Trainer Instructions for SRS](#)
- When delegating interviews and reference checks, choose individuals who understand the necessity of keeping the information they receive confidential.

- Tasks in SRS:
  1. Find the new applicant in SRS or Add them if they are not already entered.
  2. Start their certification process.
  3. Enter Interview responses or delegate that task to the person who conducted the Interview.
  4. Read and approve the Interview responses after they are entered.
  5. Read and approve the Application and Background Check information provided by the Applicant.
  6. Complete Reference checks or delegate them.
    - If delegating, establish a “due date” for reference completion.

**TIP:** If any responses from the interview or reference check raises concern, consult first with your rector, head of school, institution. If you need further help contact the Safeguarding Office.

7. Review and approve background check results

**TIP:** If the background check shows a criminal or sex offender offense or other arrest or charge, consult with your rector, or head of school or institution.

8. If, at any point, it is necessary to remove a person from the certification process, (e.g. because of the interview, reference checker background check result), it is the task of the rector or head of school or institution to speak with the person.
9. After your trainer has completed the Safeguarding training, be sure that they or you have **uploaded the Sign-out Sheet/Acknowledgement to SRS or sent it to the Safeguarding Office within 2 business days.**
10. You will receive Daily Activity Reports by email to alert you when tasks have been completed so that you can take the next appropriate action.

### GETTING YOUR SAFEGUARDING TEAM TO WORK TOGETHER

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Determine if your Safeguarding Team needs a review. You might need a review if you have had a turnover, if the SRA is feeling overwhelmed and the processes are not moving forward, if the interviews or reference checks that are being delegated are not being completed promptly, or if you are finding that there is a lot of resistance to the process of certification from the applicants.

Who might your Safeguarding Team be? The Head of Congregation, School or Diocesan Organization; the Safeguarding Coordinator, Ministry and Program Leaders, Trainers, Office/Parish Administrator, anyone who might conduct Interviews or Reference Checks, anyone who initially interfaces with a person becoming an employee and anyone who might be approached by a person who is inquiring about or who wants to volunteer. Be sure they are all in SRS and that their email addresses are up to date.

If you determine that a review would be helpful, let your Rector or Head know and set up a time to go over roles and processes and responsibilities in a manner that fits your location. It is the Rector's or Head's responsibility for establishing and nurturing a culture of health, safety and mutual care and thus support adherence to the certification process.

Remembering that the Head is ultimately responsible for upholding the Safeguarding Policies and processes, these responsibilities are most often delegated. The Safeguarding Coordinator is the eyes and ears to make sure the policies are being followed. The SRA is responsible for the administration of the certification processes, but should not have to act as an enforcer. The Rector or Heads should work with the Safeguarding Coordinator and SRA to identify those who can help with interviews and references. The Heads also make the final call on certification approvals.

Most often those people who are the leaders of ministries are in a good position to conduct interviews or complete references for the people they manage. Or, a particular person may be selected to do this job for the organization. They should be someone who can get the job done promptly and understands confidentiality. Sometimes it is awkward for the SRA to do an interview or reference check, in which case the Rector or designated person should be available to help. If you need more direction with this or help with getting your team established or working together, please contact the Safeguarding Office for assistance.

### HOW TO LOG IN TO SAFEGUARDING RECORDS SYSTEM (SRS)

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1. As the Safeguarding Records Administrator (SRA) you will receive an email from mbrickley@epicenter.org providing you with your Username, Password and a link to SRS. Click the link to access SRS.

**The link to SRS is:** <https://srs.epicenter.org/login>

#### **Example:**

Dear Marty Brickley,

Here are your credentials to access Safeguarding Records System of the Episcopal Diocese of Texas.

Username: mbrickley

Password: SwWyF2

Please click on the following link to login: <https://srs.epicenter.org>

Thanks very much.

**TIP:** You may choose to work in either English or Spanish in SRS

**TIP:** All Browsers are now considered compatible with SRS. If you are having issues with accessing SRS, please contact the Safeguarding Office.

2. When you click the link, it will take you to the SRS Login page.
3. Enter your **Username** and **Password**. Your **Username** will usually be your first initial and last name. You can change your **Password** once you open your **Home Page**.

**TIP:** For best results, type them in rather than cutting and pasting.

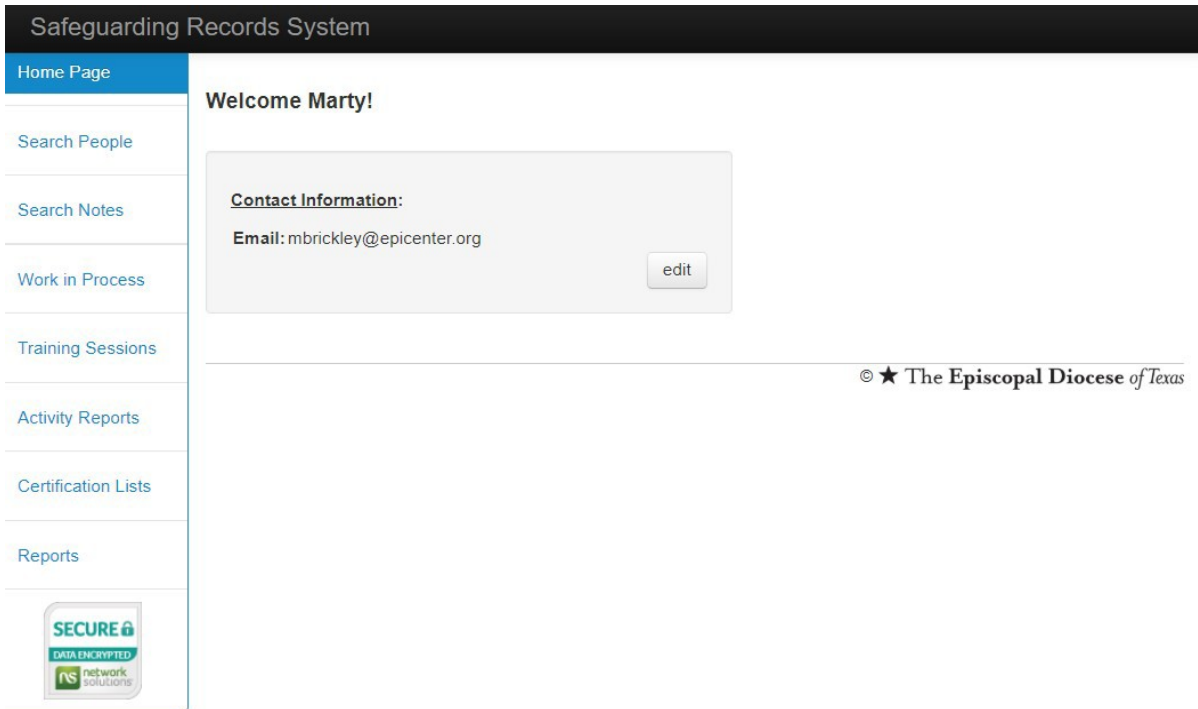
### Safeguarding Records System

#### Login

4. If you have forgotten your **Password**, use the link to have an email sent to you with your password information.
5. Your login credentials are confidential and should not be shared with anyone. Do not allow anyone else to work in SRS with your credentials.

**TIP:** If you select “Remember me on this computer”, be aware at all times of who is using your computer. Log out when you leave your desk to protect the information stored in the files.

6. Logging in will open your **Home Page**.
7. You should see a sidebar on the left with a number of selections, and on the right a box with **Contact Information**. The **edit** button will allow you to update your personal information.

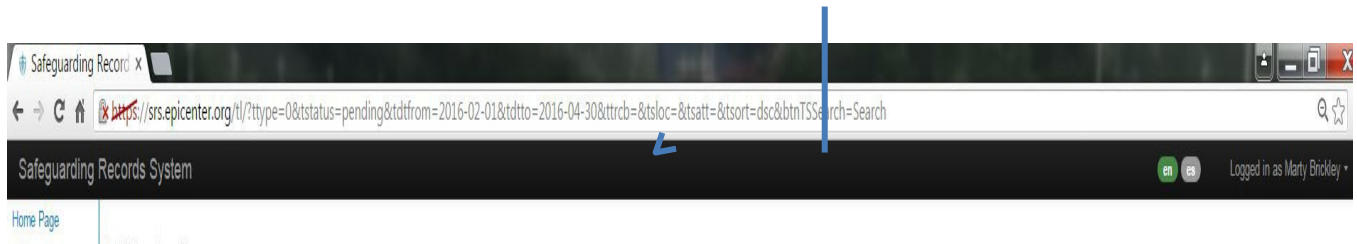


8. On the right side of the page you'll see the drop down arrow which will allow you to change your **Password** or **Logout**. At this point you will be able to choose to work in **English (en)** or **Spanish(es)**.



## ENGLISH OR SPANISH OPTION

1. To convert to the Spanish version of SRS locate the black bar across the top of the Home Page.



2. On the right side of the page you'll see two buttons which will allow you to choose "en" for English or "es" for Spanish.

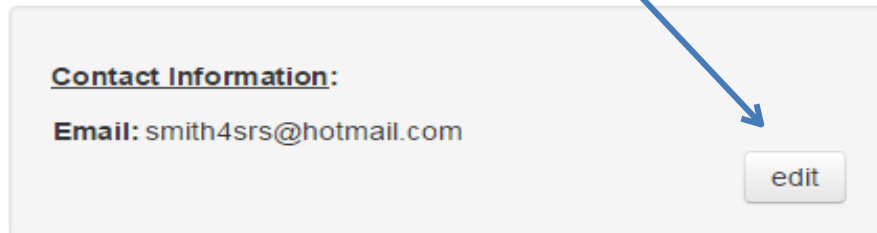


3. The applicant's entire process can then be in Spanish, including the interview questions, application, and reference questions.
4. The Sign Out Sheet can also be printed in Spanish. This is especially important if you have a Spanish only training because the applicant is also signing off on the Acknowledgement portion included on the Sign Out Sheet and they need to understand what they are signing. The information card Link: [Three Steps to Safeguarding Certification](#) is also available in Spanish on the Safeguarding pages on the Diocesan website.
5. The SGC and SGP training sessions are available in Spanish. Contact the Safeguarding Office if you need assistance with providing this for your applicants.
6. The Safeguarding Office has a Liaison to the Hispanic Communities, Tracy Cramer. He can be reached at [tcramer@epicenter.org](mailto:tcramer@epicenter.org) or 512-609-1886. Please contact him with questions.

## EDITING YOUR PERSONAL INFORMATION


1. On your **Home Page** click  to edit and update your personal information.

**Welcome Sally!**



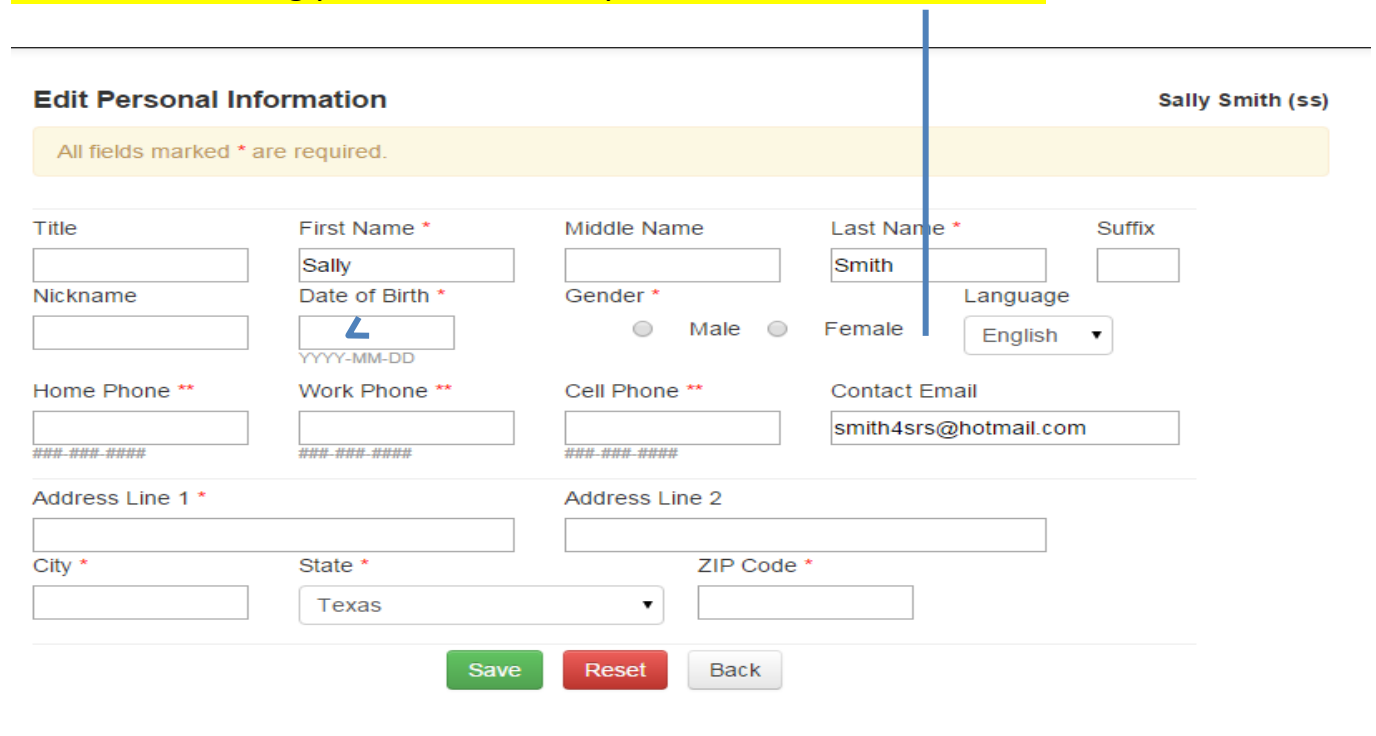
**Contact Information:**

**Email:** smith4srs@hotmail.com



2. Fill in all of the required information indicated by \*. You only need one phone number, but three options are available \*\*. When finished, click . If you need to start over, . Click on  when you want to go back to the **Home Page**.




**TIP:** When entering your Date of Birth, you must enter the Year first.



**Edit Personal Information** Sally Smith (ss)

All fields marked \* are required.

Title	First Name *	Middle Name	Last Name *	Suffix
<input type="text"/>	<input type="text" value="Sally"/>	<input type="text"/>	<input type="text" value="Smith"/>	<input type="text"/>
Nickname	Date of Birth *	Gender *	Language	
<input type="text"/>	<input type="text" value="L"/> <small>YYYY-MM-DD</small>	<input type="radio"/> Male <input type="radio"/> Female	<input type="text" value="English"/>	
Home Phone **	Work Phone **	Cell Phone **	Contact Email	
<input type="text"/> <small>###-###-####</small>	<input type="text"/> <small>###-###-####</small>	<input type="text"/> <small>###-###-####</small>	<input type="text" value="smith4srs@hotmail.com"/>	
Address Line 1 *		Address Line 2		
<input type="text"/>		<input type="text"/>		
City *	State *	ZIP Code *		
<input type="text"/>	<input type="text" value="Texas"/>	<input type="text"/>		



### IDENTIFYING APPLICANTS AND STARTING THEIR CERTIFICATION PROCESS

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#### How to Identify an Applicant:

1. Refer to the SGC and SGP Policies on the EDOT website to determine who is required to be certified in any one of the following: Safeguarding God's Children, Safeguarding God's People – Exploitation, Safeguarding God's People – Harassment. The Diocese is responsible for Safeguarding clergy, and SRAs are responsible for volunteers and employees.


Link: <https://www.epicenter.org/safeguarding/policies-and-help-sheets/>

2. Heads of Congregations, Schools and Diocesan Organizations are ultimately responsible for meeting all Safeguarding requirements at their location. A Safeguarding Coordinator may be appointed to help carry out this responsibility, but many people may actually be involved in identifying applicants. This can include the Heads of Congregations, Schools and Diocesan Organizations, SRAs, Trainers, Ministry Leaders, and anyone involved in hiring employees. A potential volunteer may themselves approach anyone of these people and let them know that they want to volunteer.

#### How an Applicant is Started in the Certification Process:

1. Once a person is identified as needing certification, the SRA should be notified and given the person's full legal name, the name they want to go by (nickname), and their current and preferred email address.

**TIP:** Their full name is going to be used for a Background Check, so the legal name is important.

2. The next step is for the SRA to search to see if the person has already been entered into the database. (See  below.)

## SEARCH PEOPLE

**ALWAYS CHECK TO SEE IF THE PERSON IS ALREADY LISTED IN THE DATABASE:**

1. Click on **Search People** – Check to see if the applicant is in the database, and if their email is correct.
2. Type at least 4 characters of the person's name and hit enter or click on **Search**.

Safeguarding Records System

Home Page

**Search People**

Work in Process

Search People

aaro

Search

3. Choose the person from the list that pops up below the box. If a duplicate name appears, make sure you choose the correct one.

### Search People

aaro

Search

Other possible results:


Name	Address	Email Address
Aaron Abbot	—	aarona4srs@yahoo.com
Aaron Abbott	1516 Post Office, Galveston TX 77550	aarona4srs@yahoo.com
Aaron Abott	510 Rathervue Place, Austin TX 78705	aabott@gmail.com
Aaron Abbptt, jr.	508 Duval, Austin TX 78709	aabottjr@gmail.com


Cannot find the person you are looking for?

Add Person

**TIP:** If the same person is listed more than once, please email the Safeguarding Office so that they can be merged.

## SAFEGUARDING RECORDS SYSTEM (SRS) MANUAL

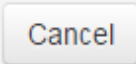

4. **CHECK THEIR EMAIL ADDRESS.** If it needs to be updated, click the icon  to edit. Resist the temptation to fill in the rest of their contact information; it is up to the applicant to fill that in.

Name	Address	Email Address
Aaron Abbot	–	aarona4srs@yahoo.com 

5. This box will open and you can correct the email address here and click .

### Update Email Address

Email Address:

6. If you need to clarify further that this is the person you are looking for, click on the name itself.

Name	Address	Email Address
Aaron Abbot	–	aarona4srs@yahoo.com 

7. If no names pop up on Search People that matches the one you are looking for, you can then add a person. (See  below.)

## ADD PERSON

1. To add a new person to SRS, click on **Add Person**.

### Search People

Sharon Smith **Search**

No matches found! Please change the search words and try again.

**Add Person**

2. Fill in the First and Last name plus email address of the applicant and click **Proceed to Confirmation**.

### Add Person

First Name \*

Last Name \*

Email Address

**Back to Search** **Proceed to Confirmation**

3. In the green box on the right you will see if the system found any matches that you will want to consider. If none are found, you can go ahead and add the person. Click **Add**.

First Name:  
**Sharon**

Last Name:  
**Smith**

Email Address:  
**ssmith@epicenter.org**

**Add** **Edit**

No matches found for Sharon Smith. Please go ahead add the person.

- You will then receive the message that the person has been added successfully and will be invited to start the certification process. You may elect to do so, or to wait and do this in **WORK IN PROCESS**.

Sharon Smith is added successfully.

### Add Sharon Smith to a Certification:

Please select a Certification

- If you choose to start the process now, click on the down arrow and it will open to give you choices. Select the certification process. If you drag your cursor over the choices it will highlight them, and you can click to select it.

Sharon Smith is added successfully.

### Add Sharon Smith to a Certification:

Safeguarding God's Children v2

Please select a Certification

Safeguarding God's Children v2

Safeguarding God's Children - Training Only v2

Safeguarding God's People - Exploitation v2

Safeguarding God's People - Exploitation Training Only v2

Safeguarding God's People - Harassment v2

SGP4 Clergy Certification: Preventing Sexual Harassment and Exploitation - Training Only v2

SGP3 Clergy Recertification - Training Only

SGP3 Clergy Recertification - Training Only v2

Safeguarding God's Children - Requires Bishop's Approval v2

Safeguarding God's People - Exploitation - Requires Bishop's Approval v2

SGC1.5 LHW Center Track – Training at SSW,Austin

SGP1.5 LHW Center Track – Training at SSW,Austin

SGP4 Seminary Certification

Background Check Only

- You will then see the screen that will allow you to start the certification process. (See the “Start Certification Process” section.)

### Safeguarding God's Children - Training Only v2

#### Invite for Training

Type and select a church or school

Type and select a person

Sharon Smith



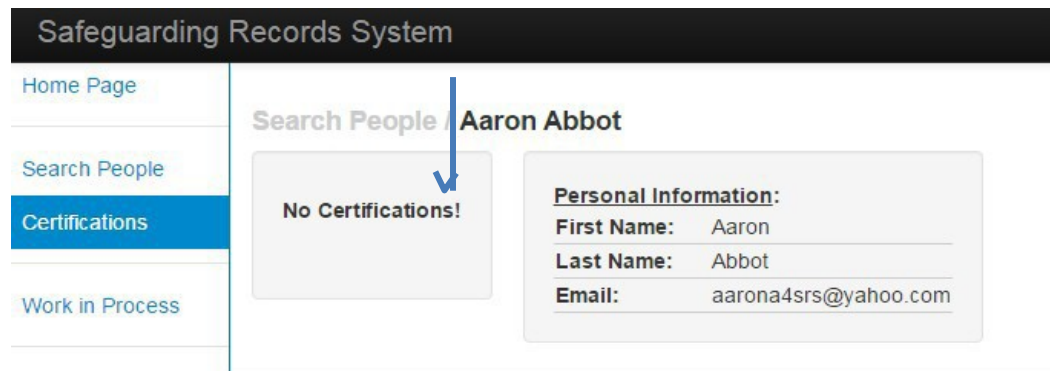
Start Certification Process

Cancel

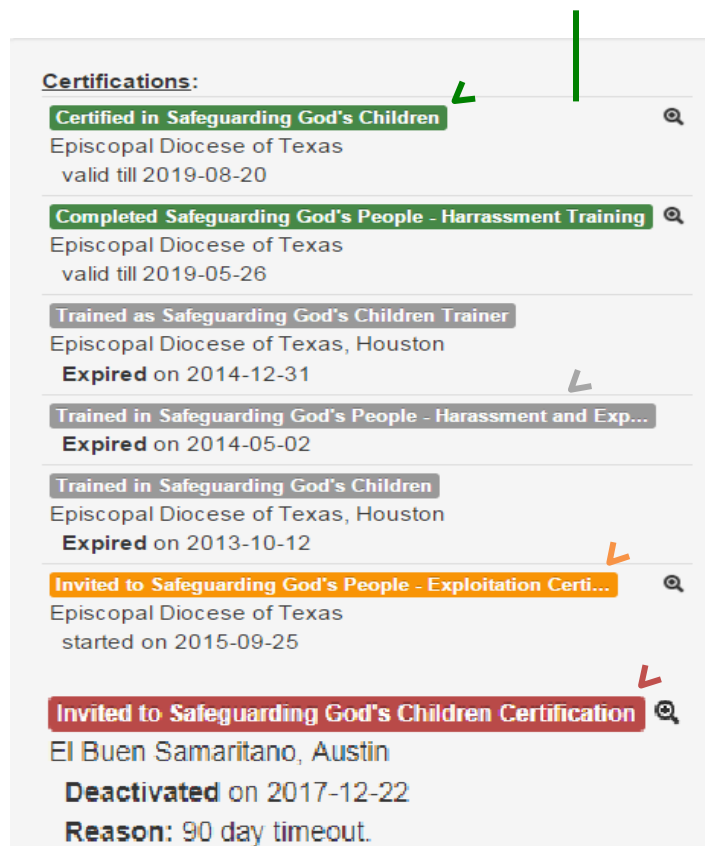
Back to Work in Process


## CERTIFICATION STATUS CHECK

1. Once you click on the person's name in **Search People**, the screen will show contact information and certifications. In the case below it shows that Aaron Abbot has no certifications.



2. You might see certifications that are **current**, **expired**, in **process** or **deactivated**.
  - Certification is Current - **Green**
  - Certification is In Process - **Orange**
  - Certification is Expired - **Grey**
  - Certification is Deactivated – **Red**



3. If the certification does not have a magnifying glass  beside it, this means that the certification took place on paper before SRS. This means that the Safeguarding Office only has a record of the training and the affiliated church, school or institution has the rest of the certification documentation.

**Certifications:**


**Completed Safeguarding God's People - Harrassment Training** 

St. Thomas' Episcopal School, Houston

valid till 2019-09-17

**Trained in Safeguarding God's Children** 

valid till 2017-07-16

4. If the certification has a magnifying glass  by it, then it can be opened by the SRA by clicking on the magnifying glass.

**Search People / Aaron Abbott**

**Certifications:**

**Certified in Safeguarding God's Children** 

St. Stephen's Episcopal School, Austin





valid till 2020-09-22

5. The affiliated SRA and Safeguarding Office are the only ones with permissions to open the certification process and view the details. Each part of the process may be opened by clicking on the magnifying glass if review is needed. The date that each task was approved is noted on the right.

**Aaron Abbott**  
Safeguarding God's Children v2

St. Stephen's Episcopal School, Austin SRA: Sally Smith

Valid from 2015-09-23 to 2020-09-22

Start Certification Process	2015-09-23 15:53 PM
Interview 	2015-09-23 16:06 PM
Apply for Certification and Background Check 	2015-09-23 16:31 PM
Background Check 	2015-09-23 16:39 PM
Reference Checks 	2015-09-23 16:46 PM
Training Session	2015-09-23 16:53 PM


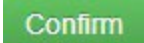
st john the divine, houston | 123 river oaks on  
[att4.pdf](#)

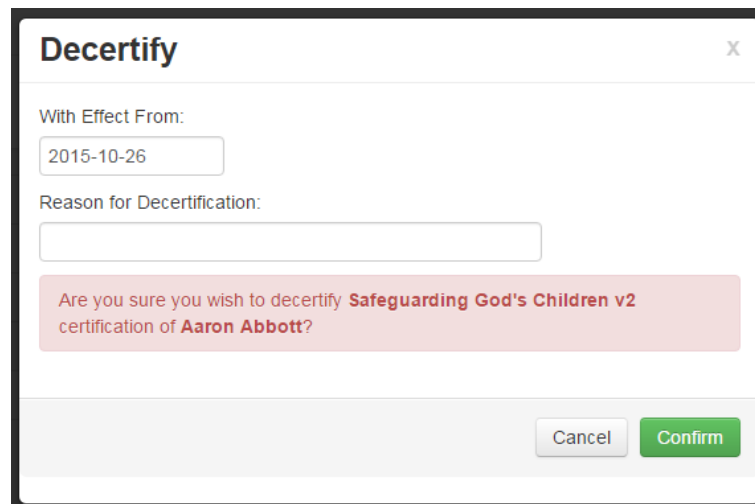
Decertify
Upload Note/Document
Print Certification
Email Certificate

Back to Certifications

6. The SRA has the options to:



- a.  You must give a reason for decertification. Remember this is discoverable, so make sure it is objectively written. Then click . Be in consultation with the head of your organization or the Safeguarding Office when choosing this action.

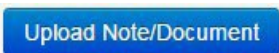
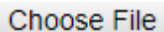



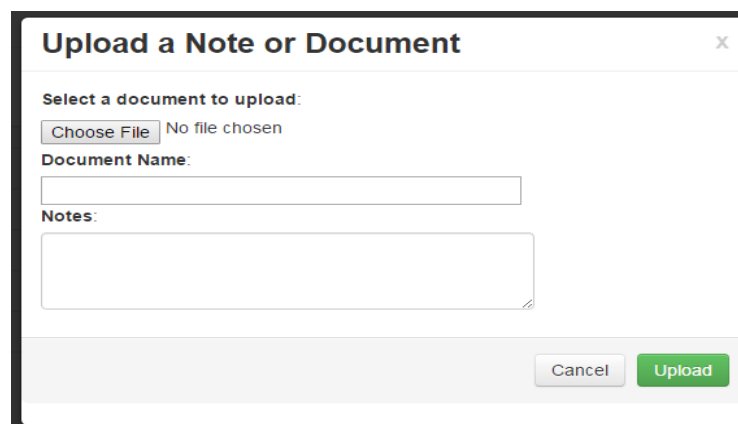
**Decertify** [X]

With Effect From:

Reason for Decertification:

Are you sure you wish to decertify **Safeguarding God's Children v2** certification of **Aaron Abbott**?

- b.  Click on  and select a file from your computer. Write a **Document Name** and include **Notes** if needed. Then click .



**Upload a Note or Document** [X]

Select a document to upload:  
 No file chosen

Document Name:

Notes:



- c. **Print Certification** Click on this button and you will be able to print the certificate. It will look something like this:



### Safe Church Record of Certification

*Aaron Abbott*

has completed the designated requirements for Safeguarding Certification in  
the Episcopal Diocese of Texas:

#### Safeguarding God's Children

Personal interview  
Application  
Reference checks  
Background check  
3 hour SGC training  
Acknowledge/Code signed

#### Safeguarding God's People/Exploitation

Personal interview  
Application  
Reference checks  
Background check  
3 hour training  
Acknowledgement signed

#### Safeguarding God's People/Harassment

2 hour training

Trained by Aaron Abbot

Date Completed: 2015-09-23

Valid Through: 2020-09-22

Trained by

Date Completed: \_\_\_\_\_

Valid Through: \_\_\_\_\_

Trained by

Date Completed: \_\_\_\_\_

Valid Through: \_\_\_\_\_

Bishop's Signature *+ C. Andrew Doyle*

- d. **Email Certificate** Click on this button and you will be able to add a message if desired. Then click **Send** to email the certificate.

**Email Certificate** X

**To:** aarona4srs@yahoo.com

**Message:**

**Attachment:** cert2.pdf


Cancel Send

### IMPORTANT:

1. When checking to see if a person listed is certified, you may see full or partial personal information filled in, and the [Edit](#) and [Send Login Info](#) button.



**Personal Information:**

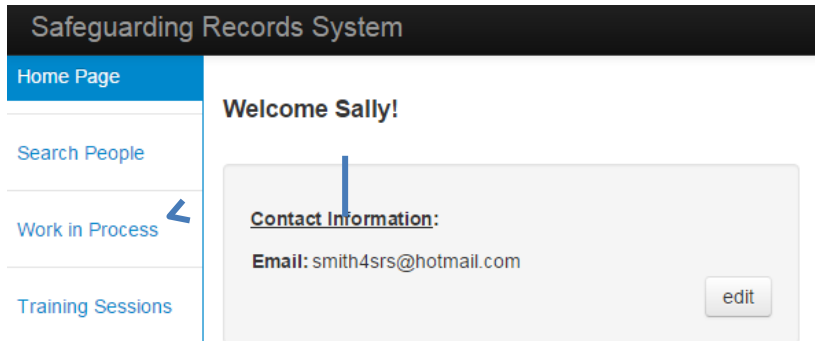
<b>First Name:</b>	Betty
<b>Last Name:</b>	Barnes
<b>Address:</b>	123 houston, katy TX 77494
<b>Cell Phone:</b>	281-705-4023
<b>Email:</b>	bettyb4srs@hotmail.com 

[Edit](#) [Send Login Info](#)

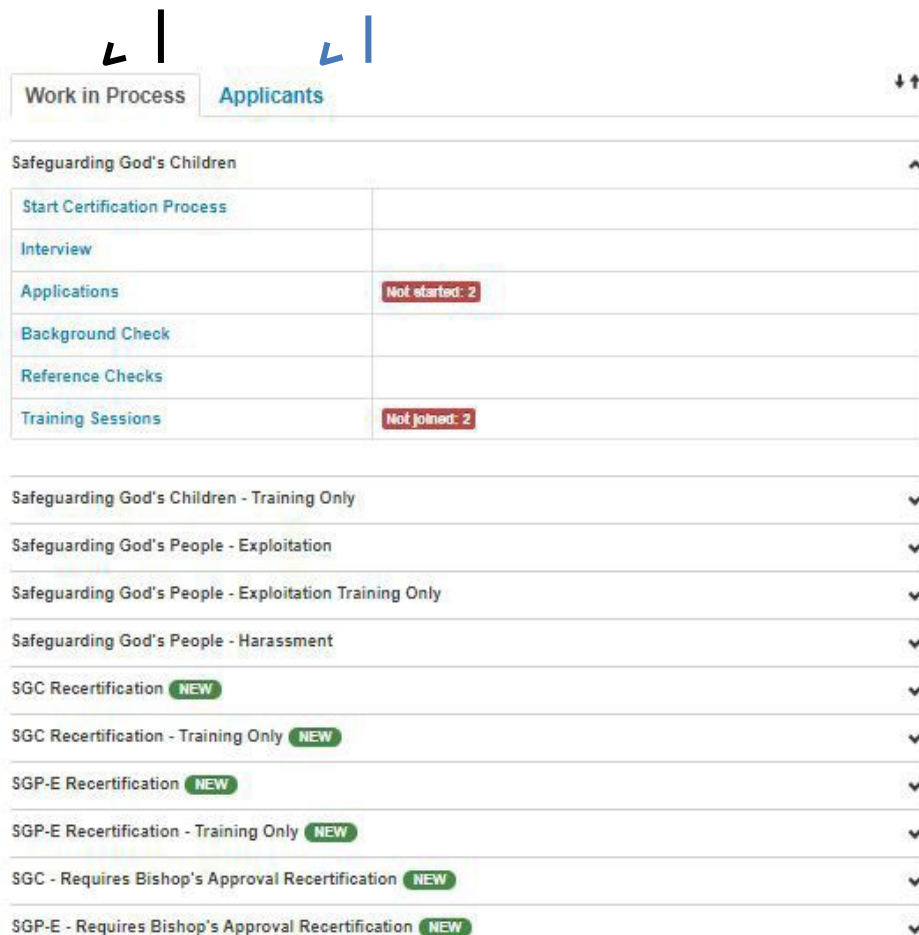
2. Resist the urge and do not update their contact information (or send their login information.) The applicant will do this when fill out their application via a direct link that they will be sent. They are responsible for this information to be entered correctly. However, you can update their email address by clicking on the icon.
3. [Send Login Info](#) You can send login information to the Rector, Head of School or Institution, and trainers as needed. They will need to have access to SRS for review or entering trainings.
4. **IF NO CERTIFICATIONS ARE FOUND, START THE CERTIFICATION PROCESS IN WORK IN PROCESS. (See below.)**

## START CERTIFICATION PROCESS

1. From your **Home Page**, choose **Work in Process** from your navigation bar.



2. The **Work in Process** page will open and the following two tabs will appear: **Work in Process** and **Applicants**. Stay in the **Work in Process** tab to start the certification process.



- Open the appropriate certification process in **Work in Process** (for example, Safeguarding God's Children), and then click on [Start Certification Process](#).

The screenshot shows a web interface with two tabs: 'Work in Process' and 'Applicants'. Under 'Applicants', there is a section for 'Safeguarding God's Children'. Within this section, the 'Start Certification Process' link is highlighted with a blue arrow. Below it, the 'Interview' link is also visible.

- A new screen will open.

## Safeguarding God's Children

### Start Certification Process

The screenshot shows the 'Start Certification Process' screen. It features a checkbox labeled 'Recertification for pre-SRS certifications.' Below this are two input fields: 'Type and select a church or school' and 'Type and select a person'. A red 'New' message states: 'Due date to complete this certification process: 2018-08-22'. At the bottom, there are two buttons: 'Start Certification Process' (blue) and 'Cancel' (red). A 'Back to Work in Process' button is located at the bottom right of the screen.

- Enter the name of your organization. When it appears below the field, you must select it.

## Safeguarding God's Children

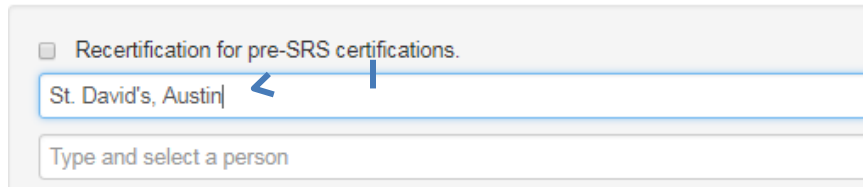
### Start Certification Process

The screenshot shows the 'Start Certification Process' screen with the 'Type and select a church or school' dropdown menu open. The dropdown is highlighted with a blue arrow. The dropdown list shows two options: 'St. David's, Aust' and 'St. David's, Austin'.

6. It will then appear in the field.

### Safeguarding God's Children

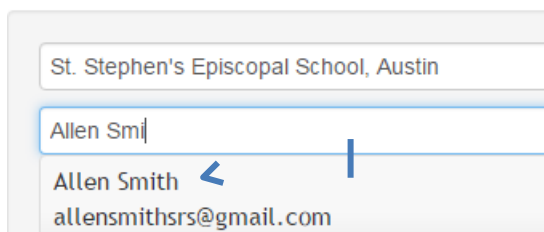
#### Start Certification Process



7. Type a portion of the person's name into the search box. People already in the system will appear with their addresses and email address (if available.)
8. If the person's name you are looking for appears, click on the name.

### Safeguarding God's Children

#### Start Certification Process

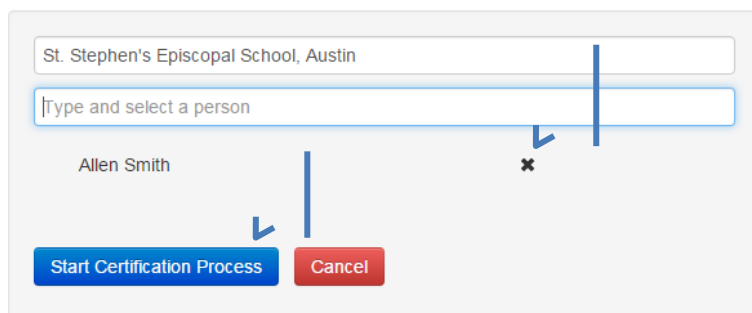


9. The name will be selected, and a list will be formed below the field.
10. If you selected an incorrect name, click on the black X beside it to remove.
11. Once the list of all those who need to begin certification have been selected, click

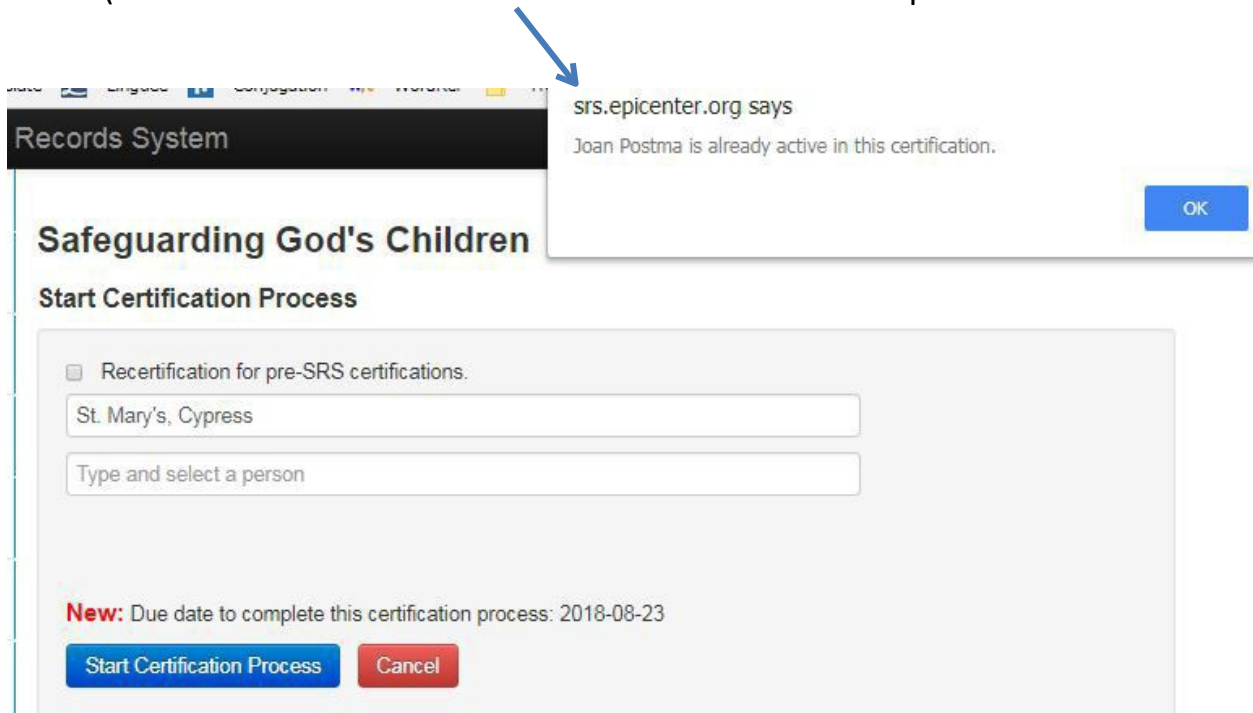
**Start Certification Process**

### Safeguarding God's Children v2

#### Start Certification Process



12. If the person is already certified, you will see a note pop up advising you of this. (You will not be able to start them in the certification process if this is the case.)



13. If they are not already active in the certification process, a **message will confirm** that you have started the certification process for the applicant.

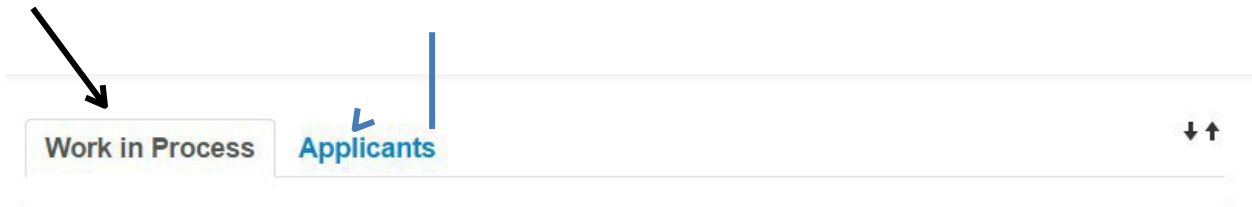
### Safeguarding God's Children v2

#### Start Certification Process



## HOW TO TRACK THE CERTIFICATION PROCESS IN WORK IN PROCESS OR APPLICANTS TAB

1. In your navigation bar click on **Work in Process**.
2. At this point, you can choose to work in the **WORK IN PROCESS** tab, or the **APPLICANTS** tab. The active tab will be in **black**, and the inactive tab will be in **blue**.



3. If you choose to work from the **WORK IN PROCESS** tab it will show you all of the certification processes that are available. You can click on the process you want to work with and all of the steps for that process will appear. You can see how many have started, or not started a process or if there is anything that needs approval.

Work in Process	Applicants	↓ ↑
Safeguarding God's Children v2 <b>NEW</b>		
Start Certification Process		
Interview	Not started: 1	
Applications	To approve: 1	
Background Check		
Reference Checks		
Training Sessions	Not joined: 1	
Safeguarding God's Children - Training Only v2 <b>NEW</b>		
Safeguarding God's People - Exploitation v2 <b>NEW</b>		
Safeguarding God's People - Exploitation Training Only v2 <b>NEW</b>		

4. You will also see designations like:

Not started: 238	Delegated: 46	To approve: 2
Not started: 402	To approve: 24	
Request Sent: 17	To approve: 54	
Not started: 285	Delegated: 110	To approve: 2
Not joined: 511	Joined: 125	To approve: 7

5. You will see how many have not yet started a process, if some steps were delegated, if there are items that need approval and if a training session has been joined. You can click on any of these designations to view the specific people and work on their processes from there.
6. You can now choose the step in the process that you want to work on. For example, you can click on Interview, Application, Background Check, Reference Checks or Training Sessions.

Work in Process	Applicants	↕
Safeguarding God's Children		
Start Certification Process		
Interview		
Applications	Not started: 2	
Background Check		
Reference Checks		
Training Sessions	Not joined: 2	
Safeguarding God's Children - Training Only		
Safeguarding God's People - Exploitation		
Safeguarding God's People - Exploitation Training Only		
Safeguarding God's People - Harassment		





## SAFEGUARDING RECORDS SYSTEM (SRS) MANUAL

7. It will open and show you the list of people that need this part completed. Click on the name and continue to work. It will show you if you need to start the step, approve a submitted item, or check on a delegated item.

Darrell Milton	St. Stephen's, Beaumont	Not Started
Cindy Milton	St. Stephen's, Beaumont	Not Started
Sandra M. Stufar	St. Martin's, Houston	To Approve
Acia M...	Good Shepherd, Austin	Not Started
Mr. Walter...	St. George's, Austin	Not Started
Christian M. Gira	St. John the Divine, Houston	Not Started
Mrs. Maria M. eno	San Pedro/St. Peter's, Pasadena	Not Started
Mr. Stephen J. M. is	Holy Spirit, Houston	Delegated
Simon M. ...ord	St. Thomas', Houston	Delegated
Mrs. Kathleen M...	All Saints', Stafford	Not Started

8. You may also be given the opportunity to view a submitted item, or send a reminder email.

Liz Alvarez	Trinity Episcopal School, Galveston	Not Started	
Ms. Barbara Ann...	Good Shepherd, Kingwood	Submitted	<a href="#">view application</a>
John Anderson	Calvary, Richmond	Not Started	











9. If you choose to work from the **APPLICANTS** tab, the list of all the applicants will appear.
10. To the right of each name you will see the next step that is needed for that person. You can open the step, or send a reminder email or  even add them to a training  if that step is available.

Work in Process
Applicants

Select Organization: Calvary, Bastrop

**Calvary, Bastrop**

SRA: Jane Sevier

Mrs. Dorothy Børger SGP-E	Apply for Certification and Background Check <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not started</span>  Training Session <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not joined</span>  
Mrs. Betty D. ... SGP-E	Apply for Certification and Background Check <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not started</span>  Training Session <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not joined</span>  
Becky Scherer SGC	Interview <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not started</span>
Jane Sevier SGC	Apply for Certification and Background Check <span style="background-color: #28a745; color: white; padding: 2px 5px;">To Approve</span> Reference Checks <span style="background-color: #ffc107; color: black; padding: 2px 5px;">Started</span>
Jane Sevier SGP-E	Training Session <span style="background-color: #ffc107; color: black; padding: 2px 5px;">Joined</span>   Background Check <span style="background-color: #28a745; color: white; padding: 2px 5px;">To Approve</span> Reference Checks <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not started</span>
Marylou Thomas SGC	Training Session <span style="background-color: #ffc107; color: black; padding: 2px 5px;">Joined</span>  

### IF THE CERTIFICATION PROCESS REVEALS A CONVICTION

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“No person who is known to have a civil or criminal conviction or record of child abuse, or who has admitted to child abuse, may be ordained, employed or permitted to volunteer to work with or around children”.

If the interview, application, reference check or background check reveals a conviction for a sexual offense, the applicant is not allowed to be with or around children or youth and may not be certified. If you are uncertain about any information received, especially information about a violent offense, consult with the head of congregation, school or diocesan organization and the Safeguarding Minister.

### INTERVIEW PROCEDURES

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The Interview is the first important screening tool in the certification process. The intention for the interview is to discern if there is any reason why the process should not go forward. Reasons that the process should not proceed might be because of an answer provided or because of an intuitive sense that the interviewer has. If there is any reason for concern, the interviewer should let the SRA or Head of Congregation, School or Organization know of their concern before the interview is approved.

The best practice is to interview the Applicant in person. The interview can take place immediately when a person expresses a desire to volunteer, or during an appointment set up for interview purposes. The answers can be recorded on paper and entered into SRS later, or entered directly into SRS at the time of the interview. The interviews can be conducted by the SRA or a designated interviewer. On paper interview questions can be provided to those who will be identifying applicants (such as ministry or program leaders), and the interviewer can then provide the name, email address to the SRA after the fact and enter the interview answers online once the interview has been delegated back to them.

Link: [Safeguarding Interview and Reference Questions](#)

**Procedures** (for persons volunteering or employed in a church ministry or volunteering in a school)

**Note:** Number 3 and 4 below apply to SGC certification only and do not apply to SGP-E.

1. A Ministry or Program Leader might conduct an interview on paper prior to

advising the SRA to start this person in the process. If this is the case, be sure to obtain the person's full legal name and their nickname as well as their current and preferred email address to provide to the SRA.

2. Once the SRA is provided a name and has started the certification process, the SRA will either conduct or delegate the interview. The person who this is delegated to could be a Ministry or Program Leader, the Rector or Head of School or organization, or another designated interviewer. When the SRA delegates the interview, the interviewer will receive an email with the name of the person and a direct link to the interview form online. The answers can be entered directly on the form during the 'in person' interview, or entered later after the interview has taken place. Again, it is preferred that interviews be conducted in person. There are exceptions, but 'in person' is the best practice.
3. Determine that the person has been known to the leadership of the congregation, school or organization for at least 6 months. The best practice would be to talk with the Ministry or Program Leader to whom this person is known and ask if they know of any reason the person should not be invited into your ministry program to work with children/youth or adults.
4. In a school, be sure that the person is part of the school community (e.g. a parent), known to the school community or brings necessary professional credentials for the position they are seeking. You can mark "volunteer parent" or "employee" on the interview form online as well when this applies since often they have not been known for six months.
5. Describe the Safeguarding certification process to the person and ask if they are ready to begin that process. The interview questions will include notification of the 30 day (SGC) or 90 day (SGP) deadline.
6. Ask the person the interview questions and record their responses on the interview form or online.
7. When completed, enter the answers from the form online and submit.
8. Once the interview is approved by the SRA the applicant will receive an email inviting them to fill out and submit the application and to register for a training session. The email will provide them a direct link.

## INTERVIEW IN SRS

1. In this example in **WORK IN PROCESS**, there is one **Interview** that has not been started, one application and one outstanding Training Session. Click on **Interview**.

Work in Process
Applicants
↓ ↑

---

Safeguarding God's Children v2
NEW
^

<a href="#">Start Certification Process</a>	
<a href="#">Interview</a> <	Not started: 1
<a href="#">Applications</a>	Not started: 1
<a href="#">Background Check</a>	
<a href="#">Reference Checks</a>	
<a href="#">Training Sessions</a>	Not joined: 1

2. The names of those needing to be interviewed will show up on the next screen. Click on the name of the person you are selecting.

## Safeguarding God's Children v2

### Interview

First Name ↑
First Name ↓
Last Name ↑
Last Name ↓
Organization ↑
Organization ↓
Status ↑
Status ↓

Name	Church/School	Status
Allen Smith <	St. Stephen's Episcopal School, Austin	Not Started

3. The Interview screen will appear giving you the ability to delegate the interview or conduct it and enter the answers directly into the form.

4. Or, from the **APPLICANTS** tab, look for the person's name and you will see that they have an interview **Not started**. Click on **Interview** and it will open to the Interview page.

Work in Process
Applicants <

Select Organization: St. David's, Austin

**St. David's, Austin**

SRAs: Ann Armstrong, Katherine Muhlenbruch, Laura Faulk, Patti Penfield, SRA Davids Church

Aaron Abbot SGP-E	Apply for Certification and Background Check <b>Not started</b>
	Training Session <b>Not joined</b>
Betty Barnes SGC	<a href="#">Interview</a> <b>Not started</b>

## INTERVIEW PAGE

Before asking the interview questions, explain to the applicant the certification process, including the following:

1. You will need to fill out an application online.
2. The application will ask for four references, with phone numbers, addresses and email addresses. Only one reference may be a member of your family.
3. The application will also ask for your Driver's License Number, your Social Security Number, and the addresses of all the places where you've lived in the last ten years. We ask for this information for the purpose of the criminal background check. Your Social Security Number shows up as asterisks in the Safeguarding Records System (SRS). The actual numbers are transferred to First Advantage for the background check the moment the application is approved, and are never stored in SRS.
4. The application will also ask whether you've ever been accused of physically, sexually, or emotionally abusing a child or adult. You will, of course, have a chance to explain a "yes" answer.
5. Safeguarding God's Children Certification is a multi-step process that includes this interview, the online application, the background check, and attending a training. All of that must be completed within the next 30 days. If it isn't, you may have to start all over again. Of course, it's up to us to order and approve the background check and to check your references, but we can't do that until you complete your application online.
6. We recognize that these trainings can be distressing or triggering if you or a family member have been abused. If you have some concerns about participating in the training, please contact your Safeguarding Records Administrator.

Position type \*

☐ Volunteer ☐ Parent Volunteer ☐ Employee

☐ This person has been known to us for 6 months or more \*

1. Is there anything that would prevent you from completing this process within 30 days? \*

2. What is the position for which you are applying (volunteer or paid)? \*

☐ Volunteer ☐ Paid

3. What interests you about this position? \*

4. What has prepared you for this position? Or, what strengths, gifts or experiences do you think you will bring to this position? \*

5. With what children or youth activities or organizations are you or have you been involved as a volunteer or employee? \*

Save Draft

Proceed

Do Not Proceed

Back to Interview List

**Remind applicants of the 30 day SGC deadline and 90 day SGP-E deadline.**

## ENTERING INFORMATION FROM INTERVIEWS

When you select the person whose interview is pending, the system will return a screen for you to complete. If the interview will be conducted by another person, you have the authority to delegate the task.

## DELEGATING AN INTERVIEW

The screenshot shows the 'Safeguarding Records System' header with a language dropdown set to 'Engl'. On the left is a sidebar menu with options: Dashboard, Certification Check, Search People, Add Person, Training Sessions, and Work in Process. The main content area is titled 'Safeguarding God's Children - Interview' for 'Victoria Vargas'. It features a 'Delegated to' section with a checked checkbox, a text input field containing 'Shirley Platt', and a blue 'Delegate' button. A blue arrow points to the checkbox, and another points to the 'Delegate' button. To the right of the input field is a light blue box containing the name 'Shirley Platt', email 'scenictexans@yahoo.com', and an 'update email' button. Below the delegation section is a link: 'Click here for video help on how to delegate'.

1. Check the box to the left of where it says “Delegated to”.
2. Begin typing the name of the person you are delegating to into the field, and when the name pops up, select it.
3. Complete the delegation by clicking the blue delegate button.
4. The person delegated to will receive an email with a direct link to the interview.

**TIP:** Be sure the person is already in the system by checking for them in “Search People”. Check to make sure that their email address is correct so that they will receive the request to conduct the interview.

## UN-DELEGATING AN INTERVIEW

If this person is unable to conduct the interview, you can take the delegation of the task away by going to the same Interview screen and removing the check mark. You can then conduct the interview yourself, or you can delegate the task to another person.

The screenshot shows the 'Interview' screen for 'Aaron Abbot'. It features a 'Delegated to' section with a checked checkbox, a text input field containing 'Shirley Platt', and a blue 'Delegate' button. A blue arrow points to the checkbox. To the right of the input field is a light blue box containing the name 'Shirley Platt', email 'splatt@epicenter.org', and an 'update email' button.




## **FILLING OUT THE INTERVIEW FORM**

1. For SGC certification: Select **Volunteer**, **Parent Volunteer** or **Employee**. This will set the system up with the correct application process.

**Note:** Parent Volunteer only applies to school settings.


Position type \*

 ☐ Volunteer ☐ Parent Volunteer ☐ Employee

☐ This person has been known to us for 6 months or more \*

2. Check the box indicating you have known the volunteer for 6 months or longer.

Position type \*

 ☐ Volunteer ☐ Parent Volunteer ☐ Employee

☐ This person has been known to us for 6 months or more \*


If the applicant is an employee or a parent volunteer, you will not need to check this box. The question disappears.

Position type \*

☐ Volunteer ☐ Parent Volunteer ☒ Employee

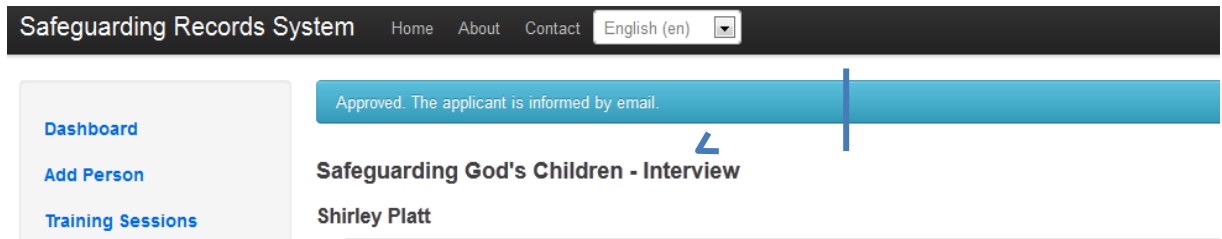
1. Why do you wish to be involved in ministry to children or youth? \*

3. Interview the applicant and enter the answers to the questions. (See the sample Interview pages in the following pages)
4. Alert the applicant to the 30 day SGC deadline, or the 90 day SGP deadline.
5. When you complete the form you will have the option to:

- If you start filling in the interview page and need to leave your computer, press the  button. The system will save the information.



- When you select **Proceed**, if you are the SRA, the interview will be approved automatically. SRS will immediately generate an email to the applicant. It will give them a direct link and instruct them to fill out their application and register for training.



- Choose **Do Not Proceed** if it is determined that this person should not continue in the certification process. Consult with your rector, head of school or organization.
  - By selecting **Back to Interview List**, you can access other interviews.
6. If you have delegated the interview, you will need to approve the interview. Under Interview on the **Work in Process** page it will indicate that you have an Interview **To Approve**.

## SGC Interview

Before asking the interview questions, explain to the applicant the certification process, including the following:

1. You will need to fill out an application online.
2. The application will ask for four references, with phone numbers, addresses and email addresses. Only one reference may be a member of your family.
3. The application will also ask for your Driver's License Number, your Social Security Number, and the addresses of all the places where you've lived in the last ten years. We ask for this information for the purpose of the criminal background check. Your Social Security Number shows up as asterisks in the Safeguarding Records System (SRS). The actual numbers are transferred to First Advantage for the background check the moment the application is approved, and are never stored in SRS.
4. The application will also ask whether you've ever been accused of physically, sexually, or emotionally abusing a child or adult. You will, of course, have a chance to explain a "yes" answer.
5. Safeguarding God's Children Certification is a multi-step process that includes this interview, the online application, the background check, and attending a training. All of that must be completed within the next 30 days. If it isn't, you may have to start all over again. Of course, it's up to us to order and approve the background check and to check your references, but we can't do that until you complete your application online.
6. We recognize that these trainings can be distressing or triggering if you or a family member have been abused. If you have some concerns about participating in the training, please contact your Safeguarding Records Administrator.

Position type \*

☐ Volunteer ☐ Parent Volunteer ☐ Employee

☐ This person has been known to us for 6 months or more \*

1. Is there anything that would prevent you from completing this process within 30 days? \*

2. What is the position for which you are applying (volunteer or paid)? \*

☐ Volunteer ☐ Paid

3. What interests you about this position? \*

4. What has prepared you for this position? Or, what strengths, gifts or experiences do you think you will bring to this position? \*

5. With what children or youth activities or organizations are you or have you been involved as a volunteer or employee? \*

Save Draft

Proceed

Do Not Proceed

Back to Interview List

## SGP INTERVIEW

Before asking the interview questions, explain to the applicant the certification process, including the following:

1. You will need to fill out an application online.
2. The application will ask for four references, with phone numbers, addresses, and email addresses. The references may not be members of your family.
3. The application will also ask for your Driver's License Number, your Social Security Number, and the addresses of all the places where you've lived in the last ten years. We ask for this information for the purpose of the criminal background check. Your Social Security Number shows up as asterisks in the Safeguarding Records System (SRS). The actual numbers are transferred to First Advantage for the background check the moment the application is approved, and are never stored in SRS.
4. The application will ask whether you have ever had complaints made against you for ethics violations or for your interactions with people while you were working or volunteering, or whether you've ever been disciplined, fired, or asked to leave a job or volunteer position because of ethics violations or your interactions with people. If you have, you will be given a chance to explain. A "yes" answer doesn't necessarily mean that your application will not be approved!
5. The application will ask if you have ever been accused of domestic violence, been the subject of a restraining order, or have ever been convicted or pleaded guilty or no contest to any crime. Again, you will be invited to explain, and a "yes" answer doesn't necessarily disqualify you.
6. The application will also ask whether you've ever been accused of physically, sexually, or emotionally abusing a child or adult. You will, of course, have a chance to explain a "yes" answer.
7. Safeguarding God's People Certification is a multi-step process that includes this interview, the online application, the background check, and attending a training. All of that must be completed within the next 90 days. If it isn't, you may have to start all over again. Of course, it's up to us to order and approve the background check and to check your references, but we can't do that until you complete your application online.
8. We recognize that these trainings can be distressing or triggering if you or a family member have been abused. If you have some concerns about participating in the training, please contact your Safeguarding Records Administrator.

1. Is there anything that would prevent you from completing this process within 90 days? \*

2. What is the position for which you are applying (volunteer or paid)? \*

☐ Volunteer ☐ Paid

3. What interests you about this position? \*

4. What has prepared you for this position? Or, what strengths, gifts or experiences do you think you will bring to this position? \*

Save Draft

Proceed

Do Not Proceed

Back to Interview List

## APPROVING THE INTERVIEW

1. In the **WORK IN PROCESS** tab, find the certification process, and find Interviews. To the right you will see noted "To Approve" and a number. This indicates how many interviews are waiting for your approval. Click on Interview and it will open to the list of interviews.

Work in Process Applicants

Safeguarding God's Children v2 **NEW**

Start Certification Process

Interview **To approve: 1**

2. Click on the person's name and it will open the interview for approval.

### Safeguarding God's Children v2

#### Interview

First Name ↑	First Name ↓	Last Name ↑	Last Name ↓	Organization ↑	Organization ↓	Status ↑	Status ↓
Name		Church/School		Status			
Gerald Garza		St. David's, Austin		To Approve			

Back to Work in Process

\*\*\*\*\*

3. Or, under the **APPLICANTS** tab, find the name of the person and click "Interview" next to **To Approve**. It will open to the Interview for approval.

Work in Process Applicants

Select Organization: St. David's, Austin

St. David's, Austin

SRAs: Ann Armstrong, Katherine Muhlenbruch, Laura Faulk, Patti Penfield, SRA Davids Church

Aaron Abbot SGP-E	Apply for Certification and Background Check <b>Not started</b> Training Session <b>Not joined</b>
Betty Barnes SGC	Interview <b>Not started</b>
Gerald Garza SGC	Interview <b>To Approve</b>

4. Review the answers to the questions. The opportunity to make a note or upload a reference file is given. This should be done before approval. Then click the Approve button.
5. Remember, reasons that the Interview should not be approved might be because of an answer provided, or because of an intuitive sense that the interviewer has. If there is any reason for concern, consult with Head of Church, School or Organization.

### Safeguarding God's Children - Interview

Gerald Garza

#### Approval Section

Reference Files, if any:

Notes:

Delegated to Patti Penfield (pattip4srs@yahoo.com)

### **APPLICANT INVITATION EMAIL (APPLICATION AND BACKGROUND CHECK RELEASE)**

---

1. After the Interview is approved, SRS automatically sends the applicant an email. A direct link will be provided to the application.
2. The following are examples of the emails that will be received by the Applicant in English and Spanish.

#### **SGC Email:**

Dear Aaron Abbot,

You are invited to apply for certification in Safeguarding God's Children.

The application process for your certification consists of two main parts – submitting an application form and joining a training session. Each part will consist of several steps. The application form consists of several pages, categorized into personal details, address history, references, previous employment and/or voluntary service information and a background check release form. The overall progress of your application will be indicated at the top of each page/screen.

Prior to beginning the application process, please gather the following information:

- Position you are applying for (volunteer or paid).
- Your full addresses for last 10 years, including city, county, and state.
- Names of 4 references with their addresses, daytime phone number, email address, length of time you have known the person and their relationship to you.
- If applying for employment at church, school, or institution: Employment history for the past 10 years with beginning and ending dates, name of firm with full address, immediate supervisor name and phone number, the position held, reason for leaving.

Part of the application process includes giving permission for a background check. Once you complete your application form, you will be able to sign up for and attend a training session.

[Please click here to continue](#) or paste the following URL into Chrome, Firefox, Safari or IE11 browser:

[https://testsrs.epicenter.org/gp/1/?url\\_auth\\_token=AAAAHcHr7JhTeDRxcOzJp3KdZaU%3ADkwLiN2aw0pwWXtOaIYOG0FsC8c](https://testsrs.epicenter.org/gp/1/?url_auth_token=AAAAHcHr7JhTeDRxcOzJp3KdZaU%3ADkwLiN2aw0pwWXtOaIYOG0FsC8c)

### **SGP-E Email:**

Dear Aaron Abbot,

You are invited to apply for certification in Safeguarding God's People - Exploitation.

The application process for your certification consists of two main parts – submitting an application form and joining a training session. Each part will consist of several steps. The application form consists of several pages, categorized into personal details, address history, references, previous employment and/or voluntary service information and a background check release form. The overall progress of your application will be indicated at the top of each page/screen.

Prior to beginning the application process, please gather the following information:

- Position you are applying for (volunteer or paid).
- Your full addresses for last 10 years, including city, county, and state.
- Names of 4 references with their addresses, daytime phone number, email address, length of time you have known the person and their relationship to you.
- If applying for employment at church, school, or institution: Employment history for the past 10 years with beginning and ending dates, name of firm with full address, immediate supervisor name and phone number, the position held, reason for leaving.

Part of the application process includes giving permission for a background check. Once you complete your application form, you will be able to sign up for and attend a training session.

[Please click here to continue](#) or paste the following URL into Chrome, Firefox, Safari or IE11 browser:

[https://testsrs.epicenter.org/gp/9/?url\\_auth\\_token=AAAAHcHr7JhTeDRxcOzJp3KdZaU%3ADkwLiN2aw0pwWXtOaIYOG0FsC8c](https://testsrs.epicenter.org/gp/9/?url_auth_token=AAAAHcHr7JhTeDRxcOzJp3KdZaU%3ADkwLiN2aw0pwWXtOaIYOG0FsC8c)

\*\*\*\*\*

3. The next steps will be completed by the applicant. They will follow the link in the email and complete their application, provide references, and give permission for a Background Check. They will also be able to register for a training session at this time. The link will remain active if they cannot locate a training.
4. If the applicant cannot complete it in one sitting, the system will save the information entered.

**International Addresses:** SRS will now allow an applicant to enter an international Address. An applicant will check the box to indicate they have one.

**Safeguarding God's Children Application**
St. Andrew's, Houston

Step 3 of 9

**New:** Due date to complete this certification process: 2020-11-10

All fields marked \* are required.  
 Once all required fields are filled, please click on the [Click here to proceed](#) button to move to the next step.

Personal Information
Address History
References
Volunteer
Background Check

☐ I have addresses from outside the US

Please list all addresses where you have lived in the past ten years (for US residents)

Address Line 1	City	State	Zip Code
*	*	*	*
asdf	adsf	Texas	78709

A box will open for them to enter their address:

Personal Information
Address History
References
Volunteer
Background Check

☒ I have addresses from outside the US

International Address(es):

Please enter all your international addresses in this box.

Please list all addresses where you have lived in the past ten years (for US residents)

Address Line 1	City	State	Zip Code

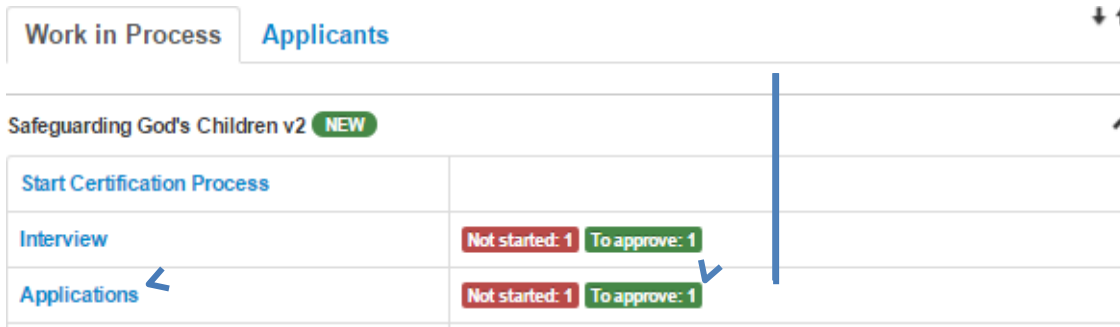
## Proper Emails corresponding to progress of applicant:

In the past when you used the email icon to resend the email inviting the applicant to a certification process, the original email was sent no matter how far they had progressed in the process. Now an email corresponding to the place they are in the process will be sent. So, if their application is needed, it will indicate this. If they only need to sign up for a training, the email will indicate this instead. This should alleviate applicants being frustrated thinking we are asking them to do an application again.



## APPLICATION REVIEW FOR APPROVAL

1. When an application has been completed, the SRA will see a message in the **WORK IN PROCESS** portion of the SRS system.

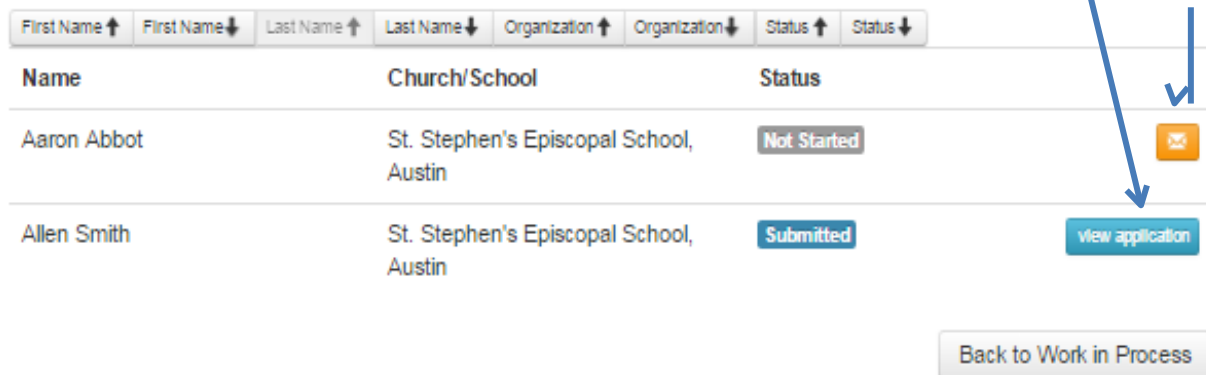



Work in Process		Applicants
Safeguarding God's Children v2 <span>NEW</span>		
Start Certification Process		
Interview	Not started: 1	To approve: 1
Applications	Not started: 1	To approve: 1

2. In the **WORK IN PROCESS** tab, to review the application contents, click “Applications”. This will open a page that shows any applications pending approval or submission as shown below.
3. Select the application you wish to review by double clicking “View Application” to the right of the applicant’s name.


### Safeguarding God's Children v2

#### Applications



Name	Church/School	Status	
Aaron Abbot	St. Stephen's Episcopal School, Austin	Not Started	
Allen Smith	St. Stephen's Episcopal School, Austin	Submitted	<a href="#">view application</a>

[Back to Work in Process](#)

**TIP:** If an applicant has not filled out their application you can “Resend Email” at this time as a reminder. Click the envelope  icon.

- Or click on the **APPLICANTS** tab, choose the person whose application needs approval, and click on “Apply for Certification and Background Check” next to the “To Approve” notice.

The screenshot shows the 'Applicants' tab selected. Below the organization name 'St. Stephen's Episcopal School, Austin', it lists 'SRAs: Calvin Carter, Sally Smith'. A table lists two applicants: Aaron Abbot SGC and Allen Smith SGC. For Allen Smith, the 'Apply for Certification and Background Check' link is highlighted with a blue arrow and a green 'To Approve' status.

Applicant	Actions
Aaron Abbot SGC	Apply for Certification and Background Check (Not started), Training Session (Not joined)
Allen Smith SGC	Apply for Certification and Background Check (To Approve), Training Session (Not joined)

- The Approval Section will open and all tabs from the application will be available for review. Review each page (tab) of the application, and after a complete review, you can Approve, Disapprove, Keep Pending, Send Back, and/or make Notes.

**TIP:** In the **Internal Notes** section, record only objective observations about applicants. Do not use personal observations or assessments. These are permanent records and can be used in a court of law.

The screenshot shows the 'Internal Notes' section with a text area for notes. Below the text area is a red banner with the instruction 'Please mark the checkboxes below each tab to confirm that you have viewed the submitted information'. At the bottom are four buttons: Approve, Disapprove, Keep Pending, and Send Back.

## Tab 1 – Personal Information

1. Make sure all required information has been provided. Check the “Viewed Submitted Information” box to confirm your review.

Personal Information | Address History | References | Employment | Background Check

First Name: Fred, Middle Name: Flint, Last Name: Farr, Date of Birth: 2000-01-16, Gender: Male

Please fill in at least one of these three phone fields.

Home Phone: 512-609-1874, Work Phone: 512-609-1874, Cell Phone: 512-609-1874, Email Address: mbrickley@epicenter.org

Driver License Number: , Driver License State: TX, ☒ I don't have a driver licence

For which volunteer ministry position or paid position are you applying?  
Sunday School assistant

What interests you about this position?  
My son is in the class and I would like to help.

What has prepared you for this position?  
I have volunteered with the Boy Scouts and coached little league.

☐ Viewed Submitted Information

2. If any information is missing or is incorrect, please use the “Send Back” button at the top of the page to send the application back to the Applicant.

Reference Files, if any:  
Choose File No file chosen

Internal Notes:

Please mark the checkboxes below each tab to confirm that you have viewed the submitted information

Approve Disapprove Keep Pending Send Back

3. A box will pop up that will ask you to give a reason that will appear in the email the Applicant will receive instructing them to complete the information.

Send Back Application

Reason:  
Please fill in the reason for sending this application back to the applicant.

Note: The reason will be emailed to the applicant.

Cancel Submit

### 4. The Applicant will receive an email that appears like this:

Dear Allen Smith,

Your application for certification in Safeguarding God's Children has been sent back to you for review. Reason: Please review and update your references.

Please contact your SRA Sally Smith ([smith4srs@hotmail.com](mailto:smith4srs@hotmail.com)) for more details.

[Please click here to continue](#) or paste the following url into Chrome, Firefox, Safari or IE11 browser:  
[https://testsrs.epicenter.org/gp/8/?url\\_auth\\_token=AAAAboEv7nLwNN4admc8BjQVp4s%3A1NksabQ6Duj95V\\_ByJCzza2zF9w](https://testsrs.epicenter.org/gp/8/?url_auth_token=AAAAboEv7nLwNN4admc8BjQVp4s%3A1NksabQ6Duj95V_ByJCzza2zF9w)

Regards,

\*\*\*\*\*

### Tab 2 – Address History

1. Click on the Address History tab to open.
2. The application requests 10 years of address history. If you are aware of any missing addresses, "Send Back" the application to request those additional addresses. Notify the Safeguarding Office if an international address has been added. Make sure no church or business addresses are entered as a personal address. "Send Back" the application for corrections.
3. The Safeguarding Records System will now allow an applicant to enter an international address. The SRA will receive notification when approving the application and should contact the Safeguarding Office to determine if an International Background Check will be required. A note should be made as to the determination "Disapprove".

# SAFEGUARDING RECORDS SYSTEM (SRS) MANUAL

This application contains international address(es). Please notify the Safeguarding office.

Approve

Disapprove

Keep Pending

Send Back

Personal Information

Address History

References

Volunteer

Background Check

☒ I have addresses from outside the US

International Address(es):

393848549 asdfdasdfdsf

adfaddsfdsafdsafdsaf

adfdadsafdsaf

adfadfdf

Please list all addresses where you have lived in the past ten years (for US residents)

Address Line 1	City	State	Zip Code
asdf	asdf	TX	78709
		TX	

☐ Viewed Submitted Information

## Tab 3 – References

1. In your review, make sure that four references and all the other information have been provided.
2. **NOTE: For SGC, only one of the references may be a relative. For SGP, no reference may be a relative, and one reference must be outside the congregation, school, or organization.**
3. Check the “Viewed Submitted Information” after the review is complete.
4. If there is a concern, consult with your rector, head of school or organization.

Personal Information
Address History
References
Volunteer
Background Check

Please list four personal references (one may be a relative) whom we may contact. We will need to be able to contact at least two of these references before your application can proceed.

**Reference 1**

<p><b>Name</b> John Smith <b>Phone</b> 555-555-5555</p>	<p><b>Relationship</b> former supervisor</p>	<p><b>How long have you known this person</b> 10 years</p>
---	--	--

**Address (city, state, zip)**  
Austin, Texas 78749  
**Email Address**  
jsmith@aol.com

**Reference 2**

<p><b>Name</b> Ken Mazda <b>Phone</b> 555-555-5555</p>	<p><b>Relationship</b> former supervisor</p>	<p><b>How long have you known this person</b> 7 years</p>
--	--	---

**Address (city, state, zip)**  
Detroit, Michigan 48075  
**Email Address**  
kmazda@gmail.com

**Reference 3**

<p><b>Name</b> Josephina Perez <b>Phone</b> 555-555-5555</p>	<p><b>Relationship</b> friend</p>	<p><b>How long have you known this person</b> 23 years</p>
--	---------------------------------------	--

**Address (city, state, zip)**  
Austin, Texas 78749  
**Email Address**  
jperez@yahoo.com

**Reference 4**

<p><b>Name</b> Duncan Clark <b>Phone</b> 555-555-5555</p>	<p><b>Relationship</b> father</p>	<p><b>How long have you known this person</b> 56 years</p>
---	---------------------------------------	--

**Address (city, state, zip)**  
Austin, Texas 78749  
**Email Address**  
dclark@hotmail.com

☐ Viewed Submitted Information

## Tab 4 – Volunteer

This tab will only be available if applicant is a Volunteer.

Personal Information Address History References **Volunteer** Background Check

For Volunteer Ministry Position - please list volunteer and/or employment experience:

1  
**Organization or Business**  
 El Buen Samaritano  
**Duties/Responsibilities**  
 ESL teacher  
**Dates**  
 2014 to 2016  
**Contact Person**  
 Griselda Hernandez  
**Phone**  
 555-555-5555

2  
**Organization or Business**  
 Manos de Cristo  
**Duties/Responsibilities**  
 clinic worker/translator  
**Dates**  
 2012 to 2014  
**Contact Person**  
 Jaime Gomez  
**Phone**  
 555-555-5555

3  
**Organization or Business**  
  
**Duties/Responsibilities**  
  
**Dates**  
  
**Contact Person**  
  
**Phone**

☐ Viewed Submitted Information

OR,

## Tab 4 – Employment

This tab will only be available if applicant is an Employee.

Personal Information Address History References **Employment** Background Check

Employment History Section - complete if applying for a paid position  
 Are you legally eligible to work in this country?  
 Yes

Note: If you are chosen for a paid position, you will be required to show documents verifying your employment eligibility and identity to complete the INS Form I-9 as required by the Immigration Reform and Control Act.

Employment history- Please complete for your current or most recent employer.

Date of Employment Started	Ended	Company name, address, city, state and zip	Immediate supervisor name and phone number	Position held	Reason for leaving
2000-02-01	present	The Company	Sue Smith	Asst. Supervisor	still present

May we contact your supervisor?  
 Yes

If yes, when may we contact him or her?  
 8 a.m. - 5 p.m.

Please complete for any other employers within the last 10 years.

Date of Employment Started	Ended	Company name, address, city, state and zip	Immediate supervisor name and phone number	Position held	Reason for leaving
----------------------------	-------	--	--	---------------	--------------------

☐ Viewed Submitted Information

## Tab 5 – Background Check

1. Make sure all boxes are checked and that the applicant has provided their Social Security Number. The Social Security Number will appear only as “\*\*\*\*\*” to you and the Safeguarding Office. Only First Advantage, our background check company, will have on record the actual number.
2. Check the “Viewed Submitted Information” after the review is complete.

The screenshot shows the 'Background Check' tab in the SRS. The form contains the following elements:

- Navigation Tabs:** Personal Information, Address History, References, Employment, Background Check (selected).
- Fields:**
  - Social Security Number:** Masked with asterisks (\*\*\*\*\*).
  - Confirm Social Security Number:** Masked with asterisks (\*\*\*\*\*).
- Consent and Agreement Checkboxes (all checked):**
  - ☒ To the best of my knowledge, the information contained in this application is complete and accurate. I understand that providing false information is grounds for denial of a volunteer or paid position or for my discharge if I have already been chosen.
  - ☒ I authorize any person or organization, whether or not identified in this application, to provide any information concerning my previous employment or volunteer activities, criminal conviction record, sexual offender registry, credit history if I will handle money in my position, driving record if I transport children in my position, or other qualifications for my volunteering. I also authorize the Episcopal Diocese of Texas to request and receive such information.
  - ☒ If chosen, I agree to be bound by the Diocese of Texas policies and procedures, including but not limited to, The Diocesan Policies for the Protection of Children and Youth from Abuse and its 'Code of Conduct for the Protection of Children and Youth' and such other policies as may be required by above named church, school or diocesan entity.
  - ☒ I also understand that my volunteering or employment may be terminated, or any offer or acceptance of volunteering or employment withdrawn, at any time, with or without cause, and with or without prior notice, at the discretion of the above named church, school or diocesan entity, the Episcopal Diocese of Texas, or myself.
  - ☒ Nothing contained in this application or in any pre-volunteering communication is intended to or does create a contract between myself and The Episcopal Diocese of Texas or the above named church, school or diocesan entity for either volunteering or employment or any other benefit.
  - ☒ In relation to my serving in The Episcopal Diocese of Texas, I understand and authorize the access of public information from various federal, state and other agencies that maintain records containing public information. I also understand that this information may be accessed during my service and up to thirty (30) days after separation from this diocese.
  - ☒ I hereby consent to you obtaining various public record information and other information from Diocesan/Church employers or agencies, by First Advantage and/or any other party or agency in accordance with the Fair Credit Reporting Act and any and all state and federal laws. I also understand that the requested information below is to be used for proper identification only and not for discriminatory purposes.
  - ☒ I agree to a background check.
- Bottom Bar:** A button labeled 'Viewed Submitted Information'.



### APPLICATION FINAL APPROVAL

1. At the top of the page you can upload a document if it is needed to supplement or clarify information in the application. Click “Choose File” and search for the document. When you locate it, click the document and it will upload. You can also add a note for any explanation that you might need in the **Internal Notes** section.

**TIP:** Record only objective observations about applicants. Do not use personal observations or assessments. These are permanent records and can be used in a court of law.

Remember, you must check the box at the bottom of each page before final approval.

Safeguarding God's Children v2

Apply for Certification and Background Check

Allen Smith

SRA: Sally Smith

#### Approval Section

Reference Files, if any:

Choose File No file chosen

Internal Notes:

Approve

Disapprove

Keep Pending

Send Back

2. When all the tabs have been reviewed and there are no further questions about the application, click on the Approve button. The Background Check request(s) will automatically go to First Advantage, and the reference checks can be conducted while waiting for the Background Check results.

## BACKGROUND CHECKS

1. After an Application has been approved, a message is automatically sent to First Advantage requesting a Background Check.
2. First Advantage will conduct the background check and return the results automatically. The results will go directly into the applicant's file and you will see that it has been received. At that time, review the results to determine if the background check can be approved. After selecting the Approved button, you will be given the option to return to **WORK IN PROCESS**.
3. First Advantage will bill the Houston Diocesan Center for all background checks.
4. Select Background Check from **WORK IN PROCESS**.



Work in Process Applicants	
Safeguarding God's Children v2 <span style="background-color: green; color: white; padding: 2px;">NEW</span>	
Start Certification Process	
Interview	
Applications	
Background Check	To approve: 1
Reference Checks	Not started: 1
Training Sessions	Joined: 1

5. Then select the applicant to review by clicking on the Applicant's name.

### Safeguarding God's Children v2

#### Background Check

First Name ↑	First Name ↓	Last Name ↑	Last Name ↓	Organization ↑	Organization ↓	Status ↑	Status ↓
Name		Church/School			Status		
Aaron Abbot		St. Stephen's Episcopal School, Austin			To Approve		

6. Or select the person's name in the **APPLICANTS** tab.

Work in Process
Applicants

Select Organization: St. David's, Austin

**St. David's, Austin**

SRAs: Ann Armstrong, Katherine Muhlenbruch, Laura Faulk, Patti Penfield, SRA Davids Church

Tracy Cramer  
SGC  
**New:** Due Date: 2016-10-18

Apply for Certification and Background Check
To Approve

Training Session
Not joined
✉
+

7. Review the report which includes the “Remarks” and “Search Results” and decide on whether to Approve or Disapprove. A background check that can be approved immediately will contain the words in the example below.

Approval Section

**Reference Files, if any:**

Choose File No file chosen

**Internal Notes:**

Automatic background check request submitted to LexisNexis on 2018/06/09

Background Check Completed on 2018/06/11

**New:** Due date to complete this certification process: 2018-09-05

Approve
Disapprove
Keep Pending

Background Check by LexisNexis / First Advantage:

SOCIAL SECURITY VERIFICATION

**CUSTOMER PROVIDED INFORMATION**

**Remarks:**

[Record ordered](#)

[Type of Search](#)

[Address Covered](#)

[Record ordered](#)

[Type of Search](#)

[Address Covered](#)

[Court Name/Type](#)

[Name Searched](#)

**DOB: //XXXX**

**AN IDENTITY VERIFICATION SEARCH HAS BEEN COMPLETED AND NO DISCREPANCIES WERE FOUND.**

CRIMINAL RECORD

Felony Including Misdemeanor

123 DRIVE ATLANTA FORSYTH, GA

→ Search Results

CLEAR

CRIMINAL RECORD

Lexisnexis National Criminal File

123 DRIVE ATLANTA , GA

DATABASE SEARCH

ROBERT LEE SMITH JR

Search Results

CLEAR

59

8. Other “Remarks” that require no interpretation are:
  - a. SUBJECT NAME RETURNED MATCHED WITH A DEVELOPED NAME.
  - b. SUBJECT NAME RETURNED MATCHED WITH A DEVELOPED NAME. A SOCIAL SECURITY NUMBER VERIFICATION SEARCH HAS BEEN COMPLETED AND NO DISCREPANCIES WERE FOUND.
9. Sometimes background check “Remarks” are less straightforward. Click for [SRS Background Check Help Sheet](#).
10. If the Background Check reveals a conviction:
  - a. “No person who is known to have a civil or criminal conviction or record of child abuse, or who has admitted to child abuse, may be ordained, employed or permitted to volunteer to work with or around children”.
  - b. If the check reveals a conviction for a sexual offense, the applicant is not allowed to be with or around children or youth. Notify the head of congregation, school or diocesan organization who, in turn, must notify the Safeguarding Minister.
  - c. Conviction for minor offenses is usually not sufficient to deny an individual employment or a volunteer position. If you receive notice of a conviction, especially regarding violent offenses, or are uncertain how to interpret the search results, please consult with the Safeguarding Minister for assistance.
11. Always note when the Head has been consulted. See [Background Checks in Safeguarding](#). Make a note in the “Internal Notes” field provided that the decision was made after review and consultation with the Head. **Record only objective comments about applicants; do not use personal observations or assessments. These are permanent records and can be used in a court of law.**
12. If the person is not approved to proceed at this point, or at any point, it is up to the Head to communicate this to the applicant.
13. **International Background Check** - If an international address was entered on the application be sure to contact the Safeguarding Office to determine whether an International Background Check should be run. If one is run It can be uploaded as an additional document to the applicable certification documentation.

## REFERENCE CHECKS

1. Reference checks may be completed by the SRA or person to whom the checks have been delegated.
2. After an applicant has completed an application, you will find in **WORK IN PROCESS** that the Reference Checks have “Not Started”. (The number beside each category indicates the number of applicants awaiting reference checks.)

Safeguarding God's Children v2 <span style="color: green; font-weight: bold;">NEW</span>	
Start Certification Process	
Interview	
Applications	
Background Check	To approve: 1
Reference Checks	Not started: 1
Training Sessions	Joined: 1

3. Click on Reference Checks and select the person whose references you wish to check by double clicking on their name.

## Safeguarding God's Children v2

### Reference Checks

First Name ↑	First Name ↓	Last Name ↑	Last Name ↓	Organization ↑	Organization ↓	Status ↑	Status ↓
Name		Church/School				Status	
Aaron Abbot		St. Stephen's Episcopal School, Austin				Not Started	

4. There will be 4 references for each applicant. The system will not let you go forward until you have personally talked to at least two people and entered their answers to all the questions. You will see a note under the applicant's name noting how many references are needed. For example:

- **At least 2 references need to be contacted.**  
For regular SGC and SGP certification processes
- **At least 3 references need to be contacted.**  
For Bishop's Approval process

**NOTE:** For SGC, the applicant may list one relative as a reference. For SGP, the applicant cannot use any relatives as a reference.

5. When you click on the applicant's name, the references will open and look like this:

## Reference Checks

**New:** Due date to complete this certification process: 2018-08-22

### Aaron Abbot

At least 2 references need to be contacted.

Sandy James

Fu Schroeder

John Doe

Mary Smith

Phone

512-555-1212

Email Address

sjames@gmail.com



How long applicant  
has known reference  
10 years

Relationship to  
applicant  
senior warden

☐ Delegated to

Delegate

☐ Delegate all references to this person

Status: Pending

Record of call attempts

6. Or, under the **APPLICANTS** tab, look for the applicant's name. Then, select "Reference Checks". It indicates that they have not been started.

Work in Process

Applicants

## St. Stephen's Episcopal School, Austin

Aaron Abbot  
SGC

Background Check

To Approve

Reference Checks

Not started

Training Session


Joined



7. When you open the references, you can either delegate the reference checks to another person or start calling and entering the answers yourself.

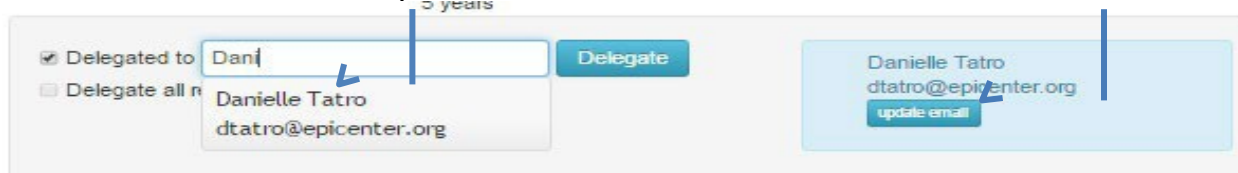
## DELEGATING REFERENCE CHECKS

1. Locate References under the **WORK IN PROCESS** tab or the **APPLICANTS** tab.
2. Click the box preceding “Delegated to”.



☒ Delegated to  Delegate  
☐ Delegate all references to this person

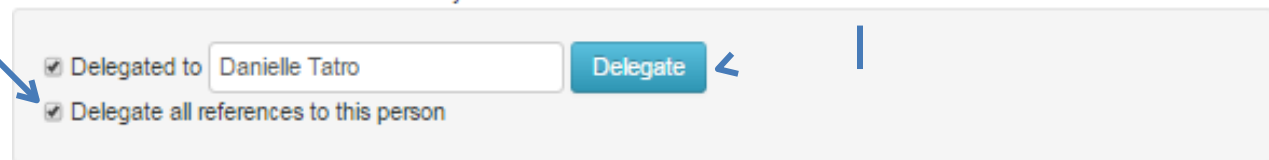
3. Enter the name of the person to whom you wish to delegate the checks. As you start to type the name it will appear below the box. Make sure the email address is current, and then select the person’s name.



☒ Delegated to  Delegate  
☐ Delegate all references to this person

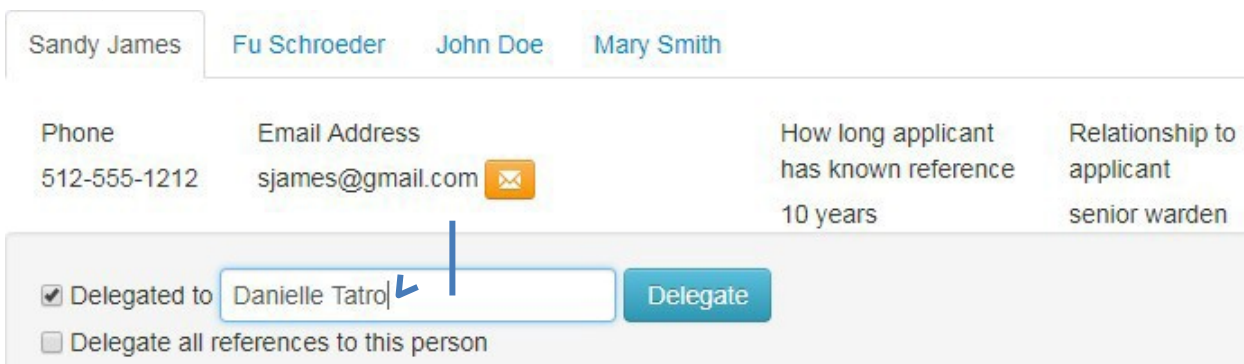
Danielle Tatro  
 dtatro@epicenter.org  
update email

4. You can delegate all four references to the same person (recommended). If you choose this option, check both “Delegated to” and “Delegate all references to this person” and then enter and select the person’s name.
5. Then click the Delegate button.



☒ Delegated to  Delegate  
☒ Delegate all references to this person

6. The “Delegate all...” box will then open up again as if you had not checked it, but if you open each reference tab, you will see that all are now delegated to the same person.



Sandy James    Fu Schroeder    John Doe    Mary Smith

Phone	Email Address	How long applicant has known reference	Relationship to applicant
512-555-1212	sjames@gmail.com	10 years	senior warden

☒ Delegated to  Delegate  
☐ Delegate all references to this person

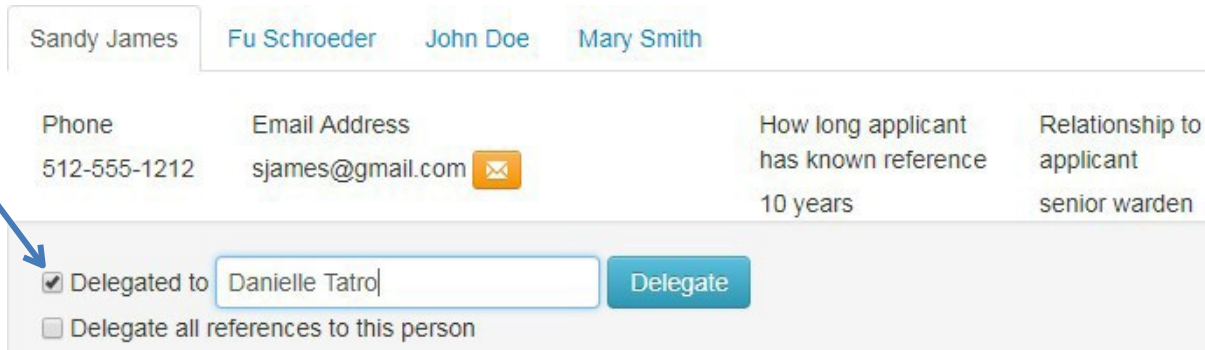
7. If you have delegated the reference check, an email will go to the person designated to conduct the check. It will have a direct link to the form only.
8. They will need to complete the references form and submit it.

**TIP:** Be sure the person you are delegating the references to has a current email in SRS.



## UN-DELEGATING REFERENCE CHECKS

To un-delegate or change delegation, click on the box preceding “Delegated to”. It will delete the delegation. A window will appear and ask “Are you sure you want to un-delegate this reference check?” Click “OKAY”. Each reference must be un-delegated. You can then fill out the reference yourself or delegate it again to another person.



The screenshot shows a user interface for managing reference checks. At the top, there are tabs for different users: Sandy James, Fu Schroeder, John Doe, and Mary Smith. Below the tabs, there is a form with the following fields:

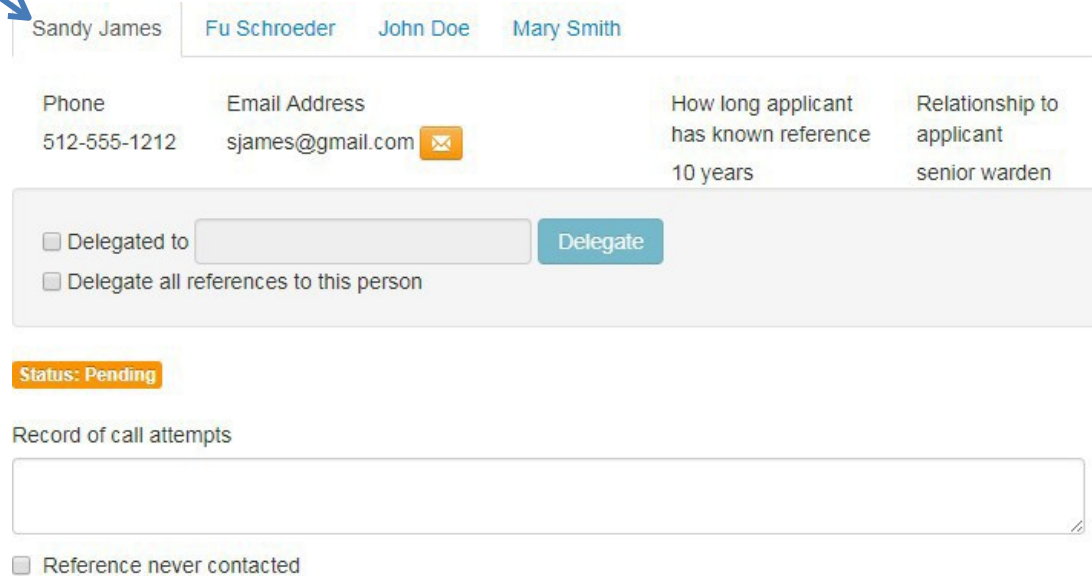
- Phone: 512-555-1212
- Email Address: sjames@gmail.com (with an email icon)
- How long applicant has known reference: 10 years
- Relationship to applicant: senior warden

Below these fields, there is a section for delegation:

- ☒ Delegated to: Danielle Tatrol (with a blue arrow pointing to the checkbox)
- ☐ Delegate all references to this person
- A blue button labeled "Delegate"

## COMPLETING REFERENCES CHECKS

1. Each reference is indicated with a tab.



The screenshot shows the same user interface as the previous one, but with the 'Delegated to' field set to an empty box. Below the delegation section, there is a status indicator and a text area for call attempts:

- Status: Pending (in an orange box)
- Record of call attempts (a large text area)
- ☐ Reference never contacted

1. Each reference tab has:

- a. Reference contact information
- b. A box for notes (Record of call attempts) for you to keep track of the number of attempts you made to speak with the person
- c. A checkbox to indicate if you were unable to contact the person
- d. Four reference questions
- e. A box for other relevant comments or information



2. If you have delegated the reference check, an email will go to the person designated to conduct the check with a direct link to the reference form.
3. Persons completing this section should refrain from editorializing or adding opinion or inferences. They should only write what the reference says and nothing else.
4. Each tab has a **Save** button at the bottom of the page for keeping any information already entered if the process cannot be completed in one sitting.
5. If the person trying to contact the reference cannot reach the person, record the call attempts, check the box ☐ Reference never contacted and click **Complete This Reference** button at the bottom of the page. A red “X” will be noted on that tab.

### Safeguarding God's Children - Reference Checks

Gerald Garza

Oscar Wilde

William Porter

X J. Frank Dobie

X James Michener

Phone

512-555-8887

How long applicant has known  
reference

5 years

Relationship to applicant

co-worker

☐ Delegated to

Delegate

Status: Pending

Record of call attempts

4/9/13 No answer  
4/10/13 No answer, left message.  
4/15/13 No answer.

☒ Reference never contacted

Did this person follow rules at work or in a volunteer position? \*

6. If their reference can be reached, fill in the answers and click the **Complete This Reference** button.


---

## SAFEGUARDING RECORDS SYSTEM (SRS) MANUAL

---

7. If after several calls you are unable to reach a reference, there is an email option (if the applicant has provided an email address for their references.)

Sandy James	Fu Schroeder	John Doe	Mary Smith
Phone	Email Address		
512-555-1212	sjames@gmail.com 	How long applicant has known reference	Relationship to applicant
		10 years	senior warden

8. Click on the envelope icon , and SRS will send an email (see example below) to the reference with a link to the reference questions.

---

**From:** tcramer@epicenter.org  
**Sent:** Monday, September 19, 2016 2:12 PM  
**To:** Joe Smith  
**Subject:** Reference check for Aaron Abbot: Joe Smith

You have been named as a reference for Aaron Abbot, who is in the process of becoming Safeguarding certified.


Please [click here to use the form](#).

or paste the following url into Chrome, Firefox, Safari or IE11 browser:

<http://testsrs.epicenter.org/erf/77/424/?email=tcramer@epicenter.org&token=15ffb3c83d6b39c6630e28fa58b920c699e99cc165edf911c5406b27d22dd784>

The information will be kept securely in the system and [name of your SRA] will have immediate access to the form and its contents.

Thanks very much.

- 
9. After the reference has entered their answers, they need to click the  button.

**TIP:** Best practice is to speak to the reference. Emailing the reference should be your second choice.

## REVIEWING REFERENCE CHECKS FOR APPROVAL

1. When the reference checks have been completed, review the comments on each reference's tab; check the "Viewed Submitted Information" box, and then Approve, Disapprove, or Keep Pending.

**Reference Checks**

**Aaron Abbot** BRA: Cyndie Woodbury

Approval Section

Reference Files, if any:

Choose File No file chosen

Internal Notes:

Please mark the checkboxes below each tab to confirm that you have viewed the submitted information

**New:** Due date to complete this certification process: 2018-08-22

Approve
Disapprove
Keep Pending

Bandy James ✔ Fu Schroeder ✔ John Doe ✘ Mary Smith ✘

**Record of call attempts**

☐ Reference never contacted

What observations can you share about how this person relates to others? How he/she relates to children?

Aaron is kind and considerate. He gives children his full attention when he works with them.

What jobs or volunteer work has this person done with children or youth?

VBS and Boy Scouts

What, if any, complaints did you ever have about this person's interaction with children or youth?

None.

What have you observed that would indicate to you this person would work well around children or youth? What, if anything, have you observed that would indicate to you that this person should not work around children or youth? (For example, a flaring temper or some other inappropriate behaviors.)

Aaron is warm and listens carefully when kids speak with him. He has a genuine concern for their emotional well being and safety.

Other relevant comments or information received from call:

Aaron would be a nice addition to your program.

☒ Viewed Submitted Information

**TIP:** When each reference check is complete, it will have a green circle with a check. When the reference was not able to be reached, a red **X** will mark that tab. An applicant must have at least two green checks to be considered for approval. All tabs must be marked either with a green circle or red **X** before approval can be made.



2. If you receive negative reference information, keep the process pending and speak to the head of your congregation, school or organization. They will determine whether to Approve or Disapprove.
3. If an application is not approved, use the **Notes** box to record "Disapproved as determined by Head of \_\_\_\_\_". The system will not let the applicant know when an application has been disapproved. The Head of your organization will need to let the person know that they are not being approved to continue the process.

**TIP:** Record only objective observations about applicants. Do not use personal observations or assessments. These are permanent records and can be used in a court of law.

### Safeguarding God's Children - Reference Checks

Gerald Garza

Approval Section

Reference Files, if any:

Notes:

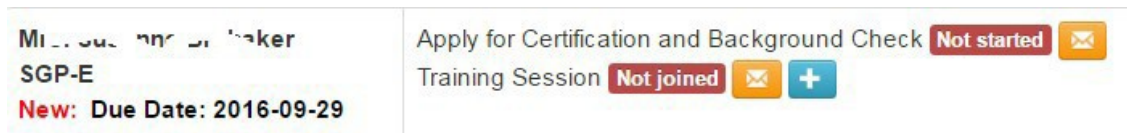
Disapproved by Rector, two positive references were not received as needed for approval. M.Brickley 4/13/12

Please mark the checkboxes below each tab to confirm that you have viewed the submitted information

## TRAINING SESSIONS

1. After completing the application, an applicant can select a training session and register while the applicant is still in SRS.
2. Registration can take place prior to the SRA approving the application and while the SRA is awaiting the Background Check results and Reference Checks to be completed.
3. Training Sessions are created by trainers or SRAs and approved by the Safeguarding Office. Upon approval, they will be listed in the Training Sessions calendar and available for selection by applicants.
4. Click on Link: [Trainer Instructions for SRS](#) for entering Trainings into the SRS calendar, how to print the Sign-Out Sheet, and how to upload the Sign-Out-Sheet for final approval.
5. All Safeguarding trainings will appear in SRS. Your applicants will only be able to register for trainings through SRS.

**TIP:** The link in the original email to the applicant remains active. If the applicant loses the email and needs to gain access to training sessions again, an email can be resent from either the **WORK IN PROCESS** tab or the **APPLICANTS** tab.



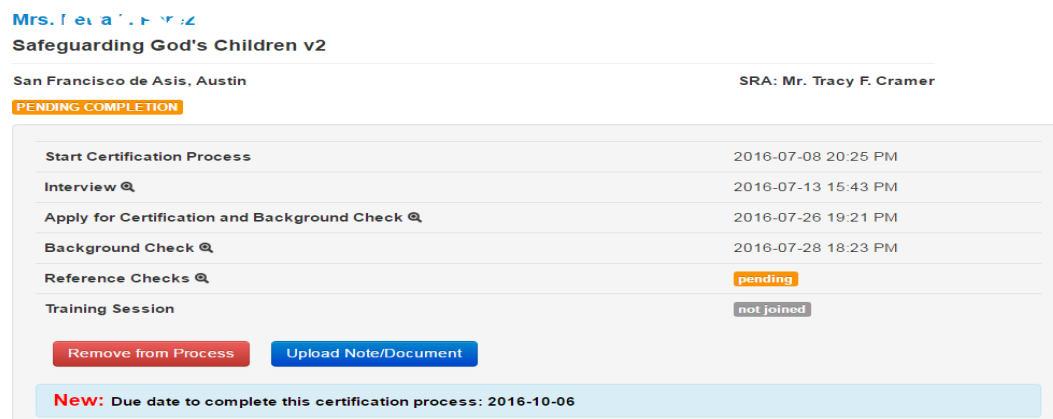
Mrs. Susan Baker  
SGP-E  
**New:** Due Date: 2016-09-29

Apply for Certification and Background Check **Not started**

Training Session **Not joined**

6. The Safeguarding Office will reconcile Sign Out Sheets with the SRA if there are any discrepancies, and credit for attendance at the training will be granted.

**TIP:** The SRA can always check on the status of an applicant's process from Search People as well as in the **WORK IN PROCESS** or **APPLICANTS** tabs.



Mrs. Susan Baker  
Safeguarding God's Children v2

San Francisco de Asis, Austin SRA: Mr. Tracy F. Cramer

**PENDING COMPLETION**

Start Certification Process	2016-07-08 20:25 PM
Interview	2016-07-13 15:43 PM
Apply for Certification and Background Check	2016-07-26 19:21 PM
Background Check	2016-07-28 18:23 PM
Reference Checks	<b>pending</b>
Training Session	<b>not joined</b>

**Remove from Process** **Upload Note/Document**

**New:** Due date to complete this certification process: 2016-10-06

## **TRAINING ONLY OPTION FOR SAFEGUARDING GODS' CHILDREN (SGC) OR SAFEGUARDING GOD'S PEOPLE (SGP-E)**

---

**Training Only is a certification option in WORK IN PROCESS used primarily by schools, and other exceptions.**

### **What makes this option different?**

1. Permission for use must be granted by the Safeguarding Office.
2. The training session portion of SGC or SGP-E certification is the only part that will be tracked and documented in SRS.
3. The Interview, Application, Background Check and References must be completed on paper or in another system and held at the local office.
4. Schools, Vendors or Organizations must have a Training Only Agreement provided by and on file with the Safeguarding Office. It must be signed by the Head of the school or organization. This letter requires that all certification documentation will equal or exceed what is currently required by Diocesan Policy.
5. For entities other than schools, permission must be obtained from the Safeguarding Office to see if they qualify for this option.

### **Training Only for SGC or SGP is limited to the following:**

1. Schools/Approved Organizations - Those who have signed the letter of agreement with the Diocese for teachers or paid staff only; volunteers must go through the full certification process in SRS.
2. Vendors - People who are employees, volunteers or contract workers with an entity which has provided a signed letter to the church, school, or institution affirming that their screening process for their staff matches or exceeds the requirements found in The Diocese of Texas Policies for SGC and/or SGP. Contact the Safeguarding Minister for details and form letter.
3. Clergy - The Safeguarding office is responsible for beginning the Clergy in their process.

### **Do not use Training Only for:**

1. Volunteers
2. Minors
3. People who are not a part of an Episcopal church, school or organization
4. People who are attending training for information purposes only \*

\* The Safeguarding Office can provide, upon request, an Acknowledgement of Training form which the trainer can sign to show that a person attended the training. This Acknowledgement has no value or standing for SGC or SGP Certification.

### **The Applicant must have completed the following in SRS:**

1. The SGC or SGP-E training confirmed by signature on the Sign Out Sheet and approved in SRS.
2. Interview, Application, Background Check and References, that meet or exceed EDOT requirements, on file at the affiliated school or organization and made available to the Safeguarding Office if requested.

**ONLY then is the applicant considered as having been screened and trained, meeting the Diocesan policy requirements for certification.**

## TRAINING ONLY PROCEDURES

1. Check to see if the applicant's name is already in SRS. If found, check to make sure their email has been entered and is current. If they are not presently in SRS, add their name and current email address. (See pages 18-19)
2. In Search People, under Certifications, verify that they are not currently certified. (See pages 22- 23).

Search People / Mr. Tran / F. Tranter

**Certifications:**

Certified in Safeguarding God's People - Exploitation
🔍

Episcopal Diocese of Texas  
Valid till 2020-09-06

Certified in Safeguarding God's Children
🔍

Episcopal Diocese of Texas  
Valid till 2020-06-29

3. If they are not certified, go to **WORK IN PROCESS**, and under **Safeguarding God's Children – Training Only**, click on Invite for Training to begin the process.

### Safeguarding God's Children - Training Only

<a href="#" style="color: #007bff; text-decoration: none;">Invite for Training</a> <span style="font-size: 1.2em;">←</span>	
<a href="#" style="color: #007bff; text-decoration: none;">Training Confirmation</a>	<div style="display: flex; gap: 5px;"> <span style="background-color: #dc3545; color: white; padding: 2px 5px;">Not joined: 63</span> <span style="background-color: #ffc107; color: white; padding: 2px 5px;">Joined: 50</span> <span style="background-color: #17a2b8; color: white; padding: 2px 5px;">Online: 3</span> <span style="background-color: #28a745; color: white; padding: 2px 5px;">To approve: 31</span> </div>

4. Enter and select the school, and then type and select the applicant's name. You can continue to select people and make a list of all those you need to enter. The names will appear below the "Type and select a person" field.
5. Then, click "Start Certification Process".

### Safeguarding God's Children - Training Only

#### Invite for Training



☐ Recertification for pre-SRS certifications.

**New:** Due date to complete this certification process: 2018-08-27

Start Certification Process
Cancel







[Back to Work in Process](#)



- Follow up to make sure the Applicant has signed up for the appropriate training by clicking on “Training Confirmation” in **WORK IN PROCESS**. You will see the applicant’s name, and it will show you if they have joined a training or not. If they have, it will tell you where they are planning on attending. There is also an  icon for resending them the email to remind them to sign up for the training and a  icon that will allow you to register the applicant as well.

## Safeguarding God's Children - Training Only v2

### Training Confirmation

First Name ↑	First Name ↓	Last Name ↑	Last Name ↓	Organization ↑	Organization ↓	Status ↑	Status ↓
Name	Church/School	Status					
Jarvis Adams	All Saints Episcopal School, Tyler	Not Joined					 
Timothy Adams	All Saints Episcopal School, Tyler	Not Joined					 
The Rev. Canonford Adams, Jr.	Episcopal Diocese of Texas	Not Joined					 
George Alexander	St. Martin's Episcopal School, Houston	Joined Training Session 717 Sage Rd. on 2016/08/09 13:00 at St. Martin's Houston 717 Sage Rd. on 2016/08/09 13:00					

















- Or, if you use the **APPLICANTS** tab, the process will be noted as **SGC-T**. You can click the “Joined” button to see the training they’ve joined. Or, if not joined, you can resend the email reminder to join a training. Or you can add them to a training.

### Work in Process Applicants


Select Organization:

#### Calvary Episcopal School, Richmond

SRA: Mr. K. Smith

Ms. J. Smith SGC-T New: Due Date: 2016-09-29	Training Session   
Mr. Smith SGC New: Due Date: 2016-09-29	Apply for Certification and Background Check   Training Session   
Callie Evans SGC New: Due Date: 2016-09-29	Apply for Certification and Background Check   Training Session   
Monica Evans SGC-T New: Due Date: 2016-09-29	Training Session   

8. After an applicant has been invited through the Training Only process, they can register for a training.
9. Training Sessions can be added by SRAs or trainers. They require approval by the Safeguarding Office before they will be available for registrations.
10. Click on Link: [Trainer Instructions for SRS](#) for how to add Trainings into the SRS Training Sessions calendar, how to print the Sign Out Sheet, and how to upload the Sign Out Sheet for final approval.
11. Applicants will only be able to sign up for trainings through SRS.

**TIP:** If the applicant is not signing up for a training, the SRA can resend the email using the envelope 

12. The Safeguarding Office will reconcile the Sign Out Sheet and its signatures with the list of people who registered for the training. When approved, the system will apply the approved credit to the applicant's process.

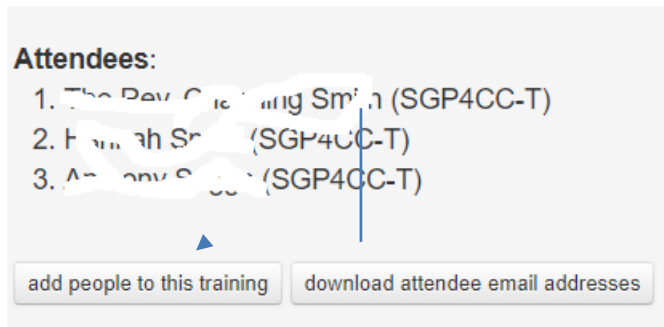
### **VIRTUAL TRAININGS**

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Virtual trainings are now commonplace for SGC and SGP trainings and are considered "in person" for training requirements.

#### **Email list available in Training Sessions for Virtual Trainings**

Trainers who graciously provide "open" trainings can access the email addresses of all attendees by clicking on the "download attendee email addresses" button. Open "Details" corresponding to the training session, and it can be found next to the "add people to the training" button below "Attendees:". This button will not show up until there are attendees registered. See illustration next page.



Once downloaded, open the file, copy, and paste the email addresses into your email containing the Zoom information for accessing the training.

### **VESTRY / BOARD POLICY REVIEW**

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#### **Vestry Policy Review - Overview**

The Safeguarding God's People policies require that Decision-Makers receive training in the SGP policies. Decision-Makers include members of Vestries, Bishop's Committees, and other governing boards of diocesan organizations that make decisions involving Pastoral Relationships or ministries to Vulnerable Adults or that influence the salary or benefits of employees. Videos that satisfy this requirement can be found on the [Safeguarding Policy Review Videos for Vestries and Boards](#) page on the Diocesan website.

**Separate SGP Policy Review videos are provided for Vestries/Bishop's Committees and for governing boards other than Vestries and Bishop's Committees.**

There is also an **optional** 8-minute video review of Safeguarding God's Children policies. We encourage all members of Vestry, Bishop's Committees, and other boards to watch the video, but the training is not currently required, and a record of compliance is not kept by the Safeguarding Office.

#### **Vestry Policy Review - Procedure and Timing**

Each member of a governing board described above is required to watch the appropriate SGP Policy Review Video within the first three months of each term served on the governing board. The video is approximately 23 minutes long and reviews not only Safeguarding God's People policies, but also the standards of behavior for clergy under Title IV, the Church's disciplinary canons, and select portions of the Clergy Manual.

Although we recommend that the video be viewed and discussed annually at a meeting of the governing board shortly after members begin a new term, members are only required to watch the video at the beginning of each term served. If the video is viewed only by members who are beginning a new term, we recommend that it be done as part of an orientation meeting, with an opportunity for questions and discussion. Members beginning a new term may view the video on their own, provided they are later given an opportunity for questions and discussion.

Note that all wardens of a congregation must also be fully certified in Safeguarding God's People, meaning that they must be screened and trained as set out in the SGP policies. Heads of School Boards are not required to be screened and trained in Safeguarding God's People.

### **How to Track Compliance with SGP Training for Decision-Makers**

Compliance with the SGP training requirement for Decision-Makers is **not** tracked electronically through the Safeguarding Records System. To verify compliance, the date on which newly elected or appointed members of Vestry, Bishop's Committee, or other boards view the appropriate training video must be recorded on the [SGP Policy Review Confirmation \(PRC\)](#).

The PRC must then be signed by the head of organization and returned by the Safeguarding Records Administrator to the [Safeguarding Office](#) with the [Annual Safeguarding Status Report](#).

If the organization has already submitted the Annual Status Report for the year, the completed PRC may be scanned and emailed to the [Safeguarding Office](#) for recording.

## SAFEGUARDING GOD’S PEOPLE IN THE WORKPLACE - PREVENTING SEXUAL HARASSMENT (SGP-H) CERTIFICATION PROCESS

---

*All employees and supervisors in any diocesan entity (parishes, schools, agencies, etc.) must be certified in Safeguarding God’s People in the Workplace- Preventing Sexual Harassment (SGP-H).*

*Supervisors are required to provide copies of the Policies Prohibiting Sexual Harassment to all employees, ensure that employees watch this video, and submit the Acknowledgment form found on the final page of this policy.*

This track is mainly for Employees, but there may be exceptions, including a staff person who is a volunteer, who may have an office, and/or who is viewed in the same way as the other employees by the congregation or organization.

The training is very short video found on the Diocesan Website at:

<http://www.epicenter.org/safeguarding-in-the-workplace-harassment-prevention-training/>. The directions are provided there. It is a facilitated training; there are no actual trainers for this certification. The best practice is that the training should be observed the by a facilitator. After the training, if there are questions, refer to the policies, or contact the Safeguarding Office.

### PRODEDURES:

1. To enter an SGP-H training Session into SRS, go to Training Sessions, select Create New and then select Safeguarding God’s People Preventing Sexual Harassment Training. The SRA may be entered as the facilitator.

Home Page

Search People

Work in Process

Training Sessions

Create New

Create New Training Session

Please select a training type to continue

3 hour Safeguarding God's Children Training	>
3 hour Safeguarding God's People Training	>
Safeguarding God's People Preventing Sexual Harassment Training	>

2. Go to Search People and make sure the applicant has been entered and a current email address is noted.
3. Then go to **WORK IN PROCESS** and select “Invite for Training” to start the process for an applicant.

### Safeguarding God's People - Harassment

Invite for Training <	
Training Confirmation <	Not joined: 33 Joined: 170 To approve: 19

4. Type and select a church or school. And then type and select a person. Lastly, click “Start Certification Process”.

### Safeguarding God's People - Harassment

#### Invite for Training

Type and select a church or school <

Type and select a person <

**New:** Due date to complete this certification process: 2018-08-27

Start Certification Process

Cancel



Back to Work in Process






5. The Applicant will receive an email notifying them that they have been invited to this process, and to sign up for a training.
6. Click on Training Confirmation to open the track to view applicants.

### Safeguarding God's People - Harassment

Invite for Training <	
Training Confirmation <	Not joined: 33 Joined: 170 To approve: 19

## SAFEGUARDING RECORDS SYSTEM (SRS) MANUAL

7. You will see the names and if the applicant has Joined or Not Joined. If the applicant has Joined, the location of the training will be displayed. There are also icons allowing the SRA to resend the email  or to register the applicant for the training .



Fernando L. ...	St David's, Austin	Not Joined	<		
Mr. ...	St. David's, Austin	Not Joined			
Am ...	St. Vincent's House, Galveston	Not Joined			
Mr. ...	Christ Church, Tyler	Joined Training Session	SGP-H		
Jr.		at 118 S. Bois D'Arc on 2015/03/23 10:05			

8. In the **APPLICANTS** tab you can also find the applicant and see if they have joined, send an email reminder, or register the applicant yourself.

**Work in Process** **Applicants**

Select Organization: St. Christopher's, Austin

**St. Christopher's, Austin**

Tracy Cramer SGP-H <b>New:</b> Due Date: 2016-12-18	Training Session <b>Joined</b>  
---	--



9. The applicants will receive an email that asks them to sign up for the SGP-H training.

**From:** Safeguarding Records System [<mailto:srs@epicenter.org>]

**Sent:** Monday, September 19, 2016 2:12 PM

**To:** Tracy F. Cramer

**Subject:** [Episcopal Diocese of Texas] You are invited to apply for Safeguarding Certification

Dear Applicant's Name,

You are invited to apply for Safeguarding God's People - Harassment.

In this certification, you will need to join an available training session and attend it.

This certification must be completed in 90 days by, 2016-12-18.

[Please click here to continue](#) or paste the following url into Chrome, Firefox, Safari or IE11 browser:

[https://srs.epicenter.org/gp/3/?url\\_auth\\_token=AAAAOGid9NfmLN4SBIsI\\_uwmD7A%3AyXsn-XfJ5XThIdRcTn--BD0xkvI](https://srs.epicenter.org/gp/3/?url_auth_token=AAAAOGid9NfmLN4SBIsI_uwmD7A%3AyXsn-XfJ5XThIdRcTn--BD0xkvI)

10. Best practice is for this training to take place in person and in a group when possible. It may be conducted on an individual basis as well.
11. Print and provide the policies to the Applicants. The Applicants will watch the video with the policies in hand. After watching, the applicants will tear off the last page, fill it out and provide it to the facilitator.
12. When this training is not conducted in person, but over the phone, the SRA will instruct the applicant to:
- 1) Go to: <https://www.epicenter.org/safeguarding/safeguarding-in-the-workplace-harassment-prevention-training-video/> **OR:** Go to [www.epicenter.org](http://www.epicenter.org) / Safeguarding (on the blackbar) / Safeguarding (in the drop list) / Safeguarding in the Workplace – Harassment Prevention Training Video.
  - 2) Print a copy of the “Policies Preventing Sexual Harassment”.
  - 3) With the policies in hand, watch the video.
  - 4) After watching, remove the last page from the policy. Complete and sign the Acknowledgment of Receipt and Review of Sexual Harassment Prevention Policies.
  - 5) Submit the sheet to your SRA.
13. The facilitator will print out the Sign Out Sheet and sign it. Then scan it and the collected Acknowledgement page(s) into one pdf document. Next, upload the one pdf document to the Training Session calendar in SRS.
14. The Safeguarding Office will approve the attendance.
15. The Applicant will receive an email confirming that they are now certified.

## RECERTIFICATION FOR SGC OR SGP-E

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### Overview

1. All certifications in SRS are valid for five years.
2. SRS started in 2012. Thus, anyone who was certified in SGC or SGP-E prior to that year did so on paper. Everyone needs to be fully certified in SRS once, so if they have not been previously certified in SRS, they must do so when their five year certification expires.
3. Applicants whose previous certification expires in the current year will need to be started in the New SGC or SGP-E Recertification tracks before their current certification expires.
4. The applicant must again attend either an in-person training or take the training modules online. Only an applicant whose recertification is due during the current calendar year is eligible to take the online training modules.
5. Two online modules are required for SGC:
  - a. Abuse Prevention Refresher
  - b. Know Your Policies! Safeguarding God's Children
  - c. Schools are required to take a third SGC module:
    - Keeping Your School Safe
  - d. Camps are required to take a third SGC module:
    - Keeping Your Camp Safe (Texas)
6. Two online modules are required for SGP-E:
  - a. Safeguarding God's People: Preventing Sexual Exploitation in Communities of Faith – for Congregations
  - b. Know Your Policies! Safeguarding God's People
7. If a person was originally certified in Training Only, and they still fit the criteria for Training Only, they may recertify in New SGC or SGP-E Recertification - Training Only.
8. Beginning in 2020, a person can recertify in another process when needed. If the SRA is unable to start the recertification process that is currently needed, please contact the Safeguarding Office for assistance.

## RECERTIFICATION FOR ANYONE WHO IS CERTIFIED IN THE FULL PROCESS IN SRS AND EXPIRING IN THE CURRENT YEAR

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Recertification tracks are for Applicants who have previously completed Safeguarding Certifications in SRS. This means that anyone who is **Fully in SRS\*** should use the Recertification Tracks.

\* **“Fully in SRS”** means that all the steps in the Safeguarding screening process (interview, application, background check, references, and training confirmation) are visible to the SRA when they click on the magnifying glass icon.

Those locations authorized to use Training Only in SRS are also eligible for recertification utilizing the Recertification Tracks.

Recertification is also available for those utilizing Bishop’s Approval Track.

### 6 Month Allowance for Recertification:

The Safeguarding Records System will allow the SRA to start a person in recertification for SGC or SGP-E for up to 6 months after their last certification has expired. There is no need to notify the Safeguarding Office. There will be no exceptions granted once the six months have passed.

Recertification is valid for five years.

**The Recertification Tracks are in WORK IN PROCESS. Scroll to the bottom of the page.**

SGC Recertification	NEW	▼
SGC Recertification - Training Only	NEW	▼
SGP-E Recertification	NEW	▼
SGP-E Recertification - Training Only	NEW	▼
SGC - Requires Bishop's Approval Recertification	NEW	▼
SGP-E - Requires Bishop's Approval Recertification	NEW	▼

## SGC or SGP-E Recertification In Person Training:

1. Create a new training in the Training Sessions Calendar.
2. Go to **WORK IN PROCESS** and select the SGC or SGP-E Recertification track. Click on the down arrow to the right to open the process.

SGC Recertification **NEW**

Start Certification Process	
Applications	
Background Check	
Training Confirmation	

SGC Recertification - Training Only **NEW**

SGP-E Recertification **NEW**

SGP-E Recertification - Training Only **NEW**

SGC - Requires Bishop's Approval Recertification **NEW**

3. Select a church, school or organization, and then type and select a person. You can make a list if you like. If you make a list, it should only be for people that will be taking the same Training Format.
4. Select Training Format: "In Person Training" and click Start Certification Process.

## SGC Recertification

### Start Certification Process

**Note:** Either in-person or online training option can be selected. If you are starting the process for a group of people, please start in-person and online training processes separately.

El Buen Samaritano, Austin

Type and select a person

Frank Frazer

Select Training Format: ☒ In Person Training ☐ Online Training

**DUE DATE** to complete this recertification process: 2017-07-23

Start Certification Process

Cancel

5. A note at the top of the page will indicate that the person has been started in the process.

### SGC Recertification

#### Start Certification Process

These people have started the certification process:

- Frank Frazer at El Buen Samaritano, Austin

6. SRS will immediately send an email to the Applicant. The email will include a link with instructions on how to Update Contact Information, consent to a Background Check and register for a training.

Subject: RE: Safeguarding God's Children Recertification

Dear Frank Frazer,

Your certification Safeguarding God's Children (SGC) is due to expire 2018-03-31.

The recertification process must be completed in 90 days by, 2017-07-23.

Recertification consists of three main parts:

1. Update personal contact information and give consent for background check.
2. Select and join an in person training from the Training Session calendar. The calendar will be available after you have updated your information.
3. Complete the in person training and sign the Sign-out Sheet at the end of the session.

**The following links are specifically for Frank Frazer. Please do not share.**

[Please click here to continue](#) or paste the following url into Chrome, Firefox, Safari or IE11 browser:

[http://srs.epicenter.org/gp/92/?url\\_auth\\_token=AAAAS3Fkv1AqFbeQmJA3cEvHTGo%3A36zPXhUZpYXTEq7\\_mj1-oR1mlLY](http://srs.epicenter.org/gp/92/?url_auth_token=AAAAS3Fkv1AqFbeQmJA3cEvHTGo%3A36zPXhUZpYXTEq7_mj1-oR1mlLY)

Regards,

7. The Applicant will click on the link and it will take them directly to a page in SRS where they will receive instructions. They need to use the “Click here to proceed” button. They will verify their Contact Information and provide consent for a new Background Check. They will then click “Submit and Proceed”.

Safeguarding Records System

Safeguarding God's Children Recertification Steps

El Buen Samaritano, Austin

Step 1 of 6

**DUE DATE** to complete this recertification process: 2017-07-23

Recertification consists of three main parts:

1. Update personal contact information and give consent for background check.
2. Select and join an in person training from the Training Session calendar. The calendar will be available after you have updated your information.
3. Complete the in person training and sign the Sign-out Sheet at the end of the session.

Snapshot of Recertification Process

```

graph TD
    A[Update Contact Info] --> B[Join Training]
    B --> C[Attend Training *]
    C --> D[Certified]
            
```

[Click here to proceed](#)

8. The Applicant will be given access to the Training Sessions Calendar and can register for a training.

Safeguarding God's Children Recertification Steps

El Buen Samaritano, Austin

Step 4 of 6

**DUE DATE** to complete this recertification process: 2017-07-23

Your application is submitted. Select a training session that you wish to join.

Show Trainings near Long Island City HI 11101
Show Trainings from my Organizations
Show All Trainings

Below you will find the calendar of available training sessions. Please select the one that best fits your schedule. This list is sortable. You can click on the headers and the list will sort appropriately. If the training is restricted you must call ahead and obtain permission to attend. To register for a training simply click on the details button and then join the session. If you have already joined or completed a training you may log out. If you need to reschedule your training, simply join a new session.

Date & Time ↑	Location & Details	Trainer	
Mon, 24th Apr 2017 03:00 PM 3 hours SGC	Austin Diocesan Center, 510 Rathervue Place, Austin 78705	Una Underwood	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; text-decoration: none;">details</a>

9. The applicant will receive an email verifying their registration.
10. In the **WORK IN PROCESS** tab, click “view application”.

## SGC Recertification

### Applications

First Name↑

First Name↓

Last Name↑

Last Name↓

Organization↑

Organization↓

Status↑

Status↓

Name	Church/School	Status	
Frank Frazer	El Buen Samaritano, Austin	Submitted	<div>view application</div>

Back to Work in Process

11. “Approve” the Updated Contact Information and Background Check authorization.


SGC Recertification <span>NEW</span>	
<a href="#">Start Certification Process</a>	
<a href="#">Applications</a>	To approve: 1
<a href="#">Background Check</a>	
<a href="#">Training Confirmation</a>	Joined: 1

12. When the Background Check results return, follow the Background Check procedures (see the Background Checks section) and “Approve”, “Disapprove” or “Keep Pending”.

SGC Recertification <span>NEW</span>	
<a href="#">Start Certification Process</a>	
<a href="#">Applications</a>	
<a href="#">Background Check</a>	To approve: 1
<a href="#">Training Confirmation</a>	Joined: 1

13. If Approved, the applicant will be given credit for the training once they attend and sign the Sign-out Sheet. They will receive an email confirmation that the recertification is complete.

### Search People / Frank Frazer

<b>Certifications:</b>	
<span>Certified in SGC Recertification</span>	
El Buen Samaritano, Austin	
Valid till 2022-04-23	

### SGC or SGP-E Recertification Online Training:

1. Go to **WORK IN PROCESS** and select the SGC or SGP-E Recertification Track. Click on the down arrow to the right to open the process.
2. Type and select a church, school or organization and then type and select a person. You can make a list if you like. If you make a list, it should only be for people that will be taking the same Training Format.
3. Select Training Format: "Online Training" and click Start Certification Process.

### SGC Recertification

#### Start Certification Process

**Note:** Either in-person or online training option can be selected. If you are starting the process for a group of people, please start in-person and online training processes separately.

El Buen Samaritano, Austin

Type and select a person

Evin Estillo



Select Training Format: ☐ In Person Training ☒ Online Training

#### Online Course List:

1. Abuse Prevention Refresher
2. Know your Policies - Safeguarding God's Children

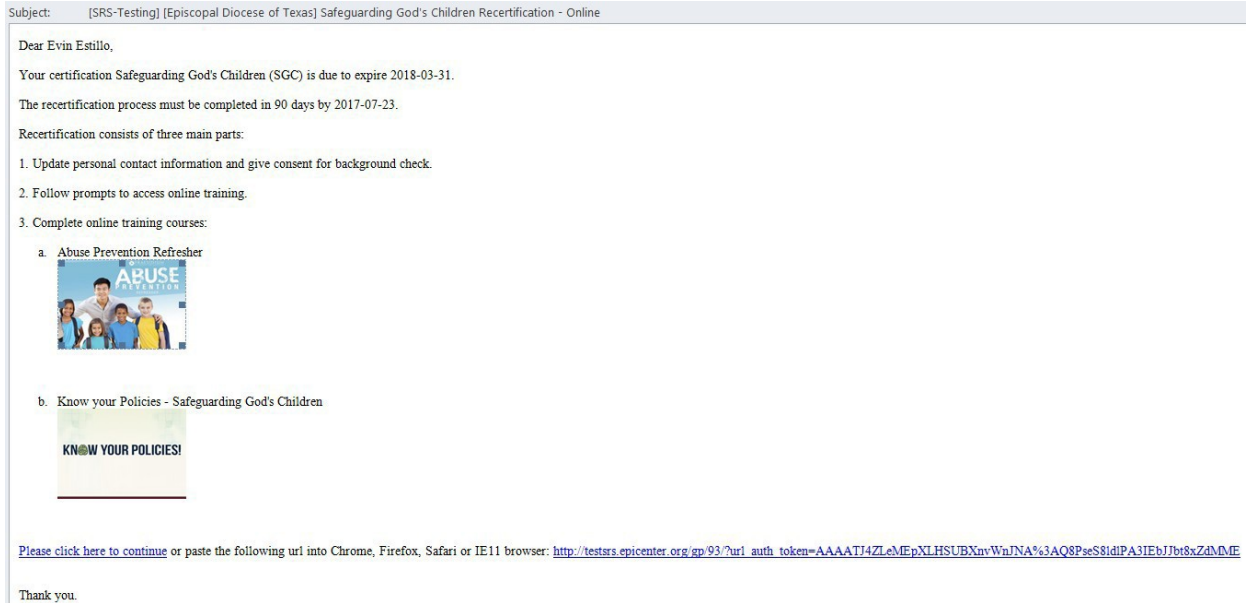
**DUE DATE** to complete this recertification process: 2017-07-23

Start Certification Process

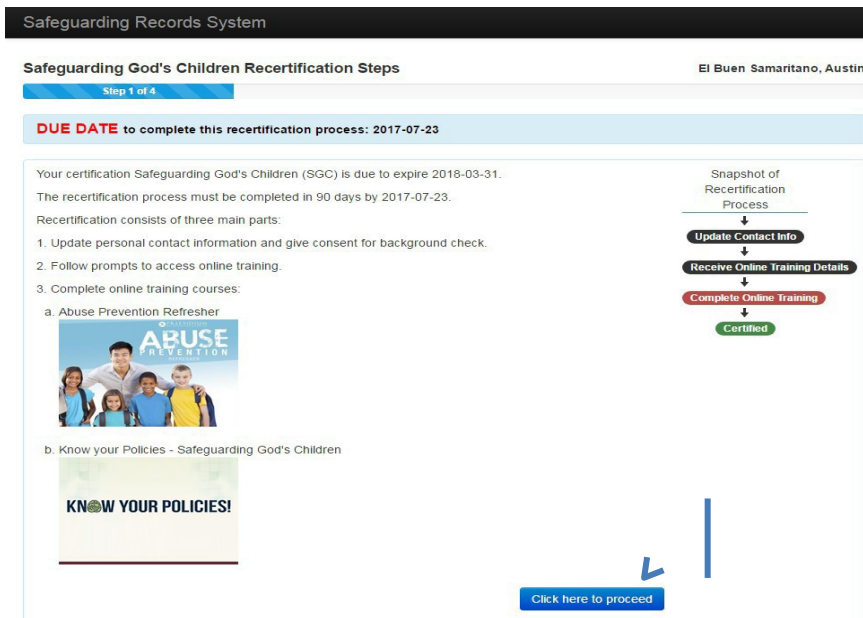
Cancel



4. SRS will immediately send an email to the applicant. The email will include a link with instructions. The email includes the applicant's username, password and required courses.



5. The applicant will click on the link and it will take them directly to their SRS page where they will receive instructions. They will Update Contact Information, provide consent for a Background Check and "Click here to proceed" to access online training information.



6. The applicant will then be given further instructions, a link to the Armatus website and their Username and Password.

### Safeguarding God's Children Recertification Steps

El Buen Samaritano, Austin

Step 4 of 4

**DUE DATE** to complete this recertification process: 2017-07-23

Your information has been submitted. You are signed up for online training.

Complete **TWO (2)** online training courses:

- a. Abuse Prevention Refresher



- b. Know your Policies - Safeguarding God's Children



#### Login Information:

Username: eestillo Password: 76ak

**Note:** You must use this Login Information even if you have completed Online Training before or have other online Praesidium/Armatus login information.

Begin Online Training Courses or paste the following url into Chrome, Firefox, Safari or IE11 browser:  
<https://test.praesidiuminc.com/armatusUser/login>

7. Once they click “Begin Online Training Courses” link, they will be taken directly to the Armatus site where they will log in and take the required courses.

The screenshot shows the Armatus login page. At the top left is the Armatus logo. Below it is a 'Login' section with the instruction 'Login using your username and password:'. There are two input fields: 'Username' and 'Password'. Below these fields is a 'Forgot Password' link and a 'Login' button. A blue box contains a certification statement: 'By logging in to Armatus, I hereby certify, as follows:'. Below this box is a red box with a disclaimer: 'Armatus covers sensitive material, including sexual and physical abuse. If you find the content disturbing, please discuss your concerns with your supervisor before your enrollment. Thank you for your commitment to protecting those in your care.'

8. Check **WORK IN PROCESS** and approve the Updated Contact Information and Background Check consent.
9. When the Background Check results return, follow the Background Check Procedures (see the Background Checks section) and “Approve”, “Disapprove” or “Keep Pending”.
10. When the applicant completes the Online Training, the system will automatically upload credit for the training to the individual’s certification process and the recertification will be complete.

### **SGC or SGP-E Recertification – Training Only In-Person Training:**

1. Create a new training in the Training Sessions Calendar.
2. Go to **WORK IN PROCESS** and select the SGC or SGP-E Recertification – Training Only track. Click on the down arrow to the right to open the process.
3. Type and select a church, school or organization and then type and select a person. You may start more than one person at a time if they are taking the same type of training.
4. Choose the “In Person” button and click on Start Certification Process.
5. SRS will immediately send an email to the applicant. The email will include a link with instructions on how to Update Contact Information and sign up for training.
6. Approve the updated contact information in the Applications section.
7. The Applicant will be given credit for the training once they attend and sign the Sign-out Sheet.
8. Recertification is now complete.

### **SGC or SGP-E Recertification – Training Only Online Training:**

1. Go to **WORK IN PROCESS** and select the SGC or SGP-E Recertification – Training Only track. Click on the down arrow to the right to open the process.
2. Type and select a church, school or organization and then type and select a person. You can make a list if you like. You may start more than one person at a time if they are taking the same type of training.
3. Select Training Format: “Online Training” and click Start Certification Process.
4. SRS will immediately send an email to the applicant. The email will include a link with instructions on how to Update Contact Information and log in for Online Training. The email includes username, password and required courses.
5. Approve the updated contact information in the Applications section.
6. Upon completion of the Online courses, recertification is complete.

### CHANGING APPLICANT CERTIFICATION AFFILIATIONS

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The Safeguarding Office can make changes regarding certification affiliations (the church, school, or organization that the volunteer or employee is affiliated with). Please contact the Safeguarding Office for any affiliation changes needed. If a certification is in process, it cannot be changed until the certification is complete. If it is imperative that it be changed during the process, again call the Safeguarding Office for help.

### CREDIT CHECKS AND DRIVING CHECKS

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1. Driving Checks and Credit Checks are processed through the EDOT offices in Houston.
2. Open this link for the form and directions: [Credit Check and Driving Record Request Form](#)

### CONDITIONAL CERTIFICATION

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At times there are circumstances where a Safeguarding certification will be noted as “Conditional”. This is indicated on the profile page or when an SRA is initiating a recertification process. There are directions to contact the Safeguarding Office. These certifications are considered local, only applicable for the location associated with the certification.

### NOTIFICATIONS FOR SRAs AND TRAINERS

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Please be sure to check on the SRS home page, when opening it up, for any notifications. We know that sometimes when time has passed between when an SRAs or Trainers last worked in Safeguarding and when they come back to it. There might have been emails in the meantime alerting SRAs of changes or requests that come from the Safeguarding office. These will appear on the page and the ability to scroll back to see what might have been posted over time. We hope this will help keep everyone up to date.

## **EDOT SAFEGUARDING POLICIES**

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The policies contain important and helpful information including who needs certification and such things as the ratios required for supervising children. They can be accessed at [Safeguarding Policies and Help Sheets](#) or <https://www.epicenter.org/safeguarding/policies-and-help-sheets/>

They include:

### Safeguarding

- Policies for the Protection of Children and Youth from Abuse
- Policies Prohibiting Sexual Exploitation
- Policies Prohibiting Sexual Harassment
- Policies for College Ministries
- Guidelines for Safeguarding Missional Communities

These policies are periodically updated, so be sure you are using the most current version.