

Episcopal Diocese of Texas Safeguarding Record System (SRS) Manual



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Overview

In 2012 the Diocesan-wide Safeguarding Records System (SRS) was introduced as a paperless system for all Safeguarding Records. This interactive software allowed the diocese to track all facets of the certification processes for Safeguarding God's Children (SGC) and Safeguarding God's People (SGP). In 2023 the new Safeguarding Records System was launched. The new system has retained all the legacy certification records while tracking new requirements. All records will be held inside the system electronically and will be held forever.

Overview of Safeguarding Screening and Training

GENERAL INFORMATION

- The Safeguarding Record Systems (SRS) of the diocese must be used to obtain, track, and retain all required documentation for screening and training, except as provided in the policies.
- Screening and training of lay persons are managed by the Safeguarding Records Administrator (SRA) of the organization in which they serve.
- Members of the clergy are screened by a separate process outside of SRS and managed by the Bishop's office in Houston. Clergy training is managed by the Safeguarding Office in Austin.
- The diocese no longer "certifies" people separately in Safeguarding God's Children or Safeguarding God's People. When someone has met the screening and training requirements set out in the policies, such person is "qualified" in Safeguarding.

WHO NEEDS SCREENING AND TRAINING

- Volunteers and employees are screened and trained according to the position or positions in which they serve. See *Safeguarding Requirements by Position*.
- Anyone current in screening and training for a position in one organization of the diocese is generally qualified to serve in the same position in another organization of the diocese without further screening or training.
- Anyone screened and trained in "Safe Church, Safe Communities" in another Episcopal diocese will be evaluated by the Safeguarding Office to determine what screening and additional training will be required.

WHAT IS INVOLVED IN SCREENING?

- Unless an organization has an Independent Screening agreement with the Safeguarding Office, adult screening is performed and tracked through SRS.
- Generally, adult screening initially requires:
 - A personal interview
 - An online application and reference checks
 - A Social Security verification and a nationwide sex offender and criminal history

background check in any state where the applicant has resided in the past seven years.

- An initial screening is good for five (5) years. Thereafter, a background check must be performed every five (5) years in order for screening to remain current. Generally, personal interviews, applications, and reference checks do not need to be repeated.
- Background checks ordered through SRS are paid for by the diocese.
- Persons under the age of 18 have a separate screening process.

WHAT IS INVOLVED IN TRAINING?

- At a minimum, training involves watching recorded video courses assigned by the Safeguarding Office and accessed online at Praesidium Academy. See *Help Sheet: Safeguarding Training by Position* Help Sheet.
- In addition, a three (3) hour Live Engagement Training is required for persons who
 - work with or around children,
 - minister to Vulnerable Adults,
 - minister in a Pastoral Relationship,
 - are the Head of Organization,
 - supervise others, OR
 - serve as a warden in a congregation.

Live Engagement training may be taken either in person or on Zoom. Persons must complete all assigned video courses before taking Live Engagement training.

- Training must be renewed every five (5) years, but not all video courses initially assigned will be required for renewal. Live Engagement training, when required, must be taken every five (5) years.
- Screening requirements are tracked separately from training requirements. Thus, a person whose screening is current in SRS does not need rescreening simply because additional training is required to meet Safeguarding qualifications.

SAFEGUARDING THRESHOLDS

- **No person who has admitted to the sexual abuse of a child or youth or who is known to have a criminal conviction or civil record of child abuse, may be employed or permitted to volunteer to work with or around children or youth in the diocese.**
- A lay volunteer must be known by the leadership of the diocese or organization for at least six

(6) months before applying for a position that involves working with or around children and youth, ministry with Vulnerable Adults, or Pastoral Relationships. Any exception must be approved by the [Safeguarding Minister](#).

- Before a lay employee or volunteer is allowed to work with or around children or

youth, minister to Vulnerable Adults, or minister in a Pastoral Relationship, such person must have completed the Safeguarding screening requirements. They may continue in their work or ministry only if they complete their training requirements within forty-five (45) days. Any exceptions must be approved by the Safeguarding Office.

- In order to serve as a Qualified Adult under the *Safeguarding God's Children: Policies Protecting Children and Youth*, a lay person must be current in all screening and training requirements.
- No member of the clergy (other than a Parent Volunteer under *SGC VII.C.1*) will be allowed to work regularly with or around children or youth until provisionally licensed to work as a member of the clergy in the diocese. For a member of the clergy to continue working with or around children, all screening and training requirements must be completed with 90 days from the start or hire date of the member of the clergy. Persons preparing for ordination are treated as clergy persons for purposes of *Section VI.A.4*.

Safeguarding Team Roles

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 meeting requirements will receive a confirmation email.
3. **Safeguarding Records Administrator (SRA)** – Has access to all records for a particular location. The SRA will start processes, 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 Applicant
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 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.

Safeguarding Requirements by Position

The level of Safeguarding screening and training required of volunteers and employees in an organization depend upon the positions they occupy and the nature of their ministry or work. These positions are organized by category in the Safeguarding Records System (SRS). Below is a brief description of the requirements for each category, including the level of screening required and whether the training required involves only online modules or both online modules and live Universal Engagement training. A person who moves from one position to another position may require additional screening and/or training. For detailed information on the training assigned to each position, see *Help Sheet: Safeguarding Training by Position*.

The diocese requires that screening and training be renewed every 5 years.

1. Lay Head of/Supervisor/SRA/Coordinator/Trainer

- Includes all lay Heads of Organizations, anyone who supervises another adult, and lay members of a Safeguarding Team (Safeguarding Record Administrators, Safeguarding Coordinators, and Safeguarding Trainers)
- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes both online modules and live Universal Engagement training

2. Administrator/Facilities/Security (Non-Supervisory)

- Includes people who do administrative work or who work as facilities staff or security staff but do not either supervise another adult or directly interact with children, youth, or vulnerable adults
- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes only online modules

3. Lay Minister/Teacher/Coach/Counselor

- Anyone whose ministry or job involves directly interacting with children, youth, or vulnerable adults but who do not supervise other adults
- Includes vendors who provide programs for children, youth, or vulnerable adults on behalf of the organization
- Includes people whose job description may fall under category 2, but who, in practice, are often called upon to interact with children, youth, or vulnerable adults
- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes both online modules and live Universal Engagement training

4. Governance—Vestry, Bishop's Committee, Board

- Includes all decision-makers (as defined in *Safeguarding God's People*:

Policies for Safe Ministry with Adults, Section I.D.), other than the Wardens of a congregation

- Requires no screening
- Training includes only online modules

5. Warden

- Includes Senior Wardens, Junior Wardens, and Bishop's Wardens
- Requires full screening in SRS
- Training includes both online modules and live Universal Engagement Training

6. Treasurer

- Requires full screening in SRS or under an Independent Screening Agreement
- Training includes only online modules

7. Vendor/Contractor (Recurrent, No Direct Interaction)

- Includes people contracted to perform services that do not involve working with children and youth or vulnerable adults but who have a regular presence at the organization that may bring them into contact with children or youth
- Screening as needed (depends upon nature and duration of work)
- Requires only an online module (a review of EDOT policies) or, with approval of the Safeguarding Office, a specialized policy review appropriate to the position

8. Key Holder (Note to SRA: When starting the SRS process, select "Yes" for "Is this screening for recertification?" to avoid full process/screening.)

- Includes people who have keys to buildings or spaces where children or youth may be present and under-supervised
- Requires full screening in SRS
- Training requires only online modules

9. Clergy, Clergy Student, Lay Chaplain, Lay Area Missioner

- Safeguarding Office acts as SRA for this category
- Includes members of the clergy, people who are preparing for ordination, lay persons endorsed by the diocese as lay chaplains, and lay Area Missioners
- Requires special screening under an Independent Screening Agreement with the diocese
- Training requires both online modules and live Clergy Universal Engagement training

10. Camp Allen Summer Staff

- For adults, requires full screening under an Independent Screening Agreement
- Training requires both online modules and live Universal Engagement training

11. Safeguarding Office Assigned

- Reserved for special situations
- Screening requirements will vary
- Training requirements will vary

12. Add-Ons

In addition to the above categories, there are “add-ons,” the most important of which are:

- All lay employees and volunteers who serve in staff positions must take an online module on Preventing Sexual Harassment in addition to the online modules otherwise assigned to their position (see *Help Sheet: Safeguarding Training by Position*).
- All lay volunteers or employees who work with vulnerable adults must take an online module on Pastoral Relationships in addition to the other online modules assigned to their category (see *Help Sheet: Safeguarding Training by Position*).
- All Safeguarding Trainers must take an online module on Pastoral Relationships in addition to the other online modules assigned to their category (see *Help Sheet: Safeguarding Training by Position*).

Safeguarding Training by Position

Persons who wish to be qualified in Safeguarding for a particular position in an organization will be assigned video courses appropriate to that position. Depending upon their position, they may also be required to take a live Universal Engagement Training (UET).

- All required video courses used for Safeguarding training are posted on the Praesidium Academy website. These video courses may be taken in Spanish or English. All Safeguarding applicants who are approved for training will receive an email with instructions for accessing the required videos.
- Universal Engagement training, when required, must be taken (in-person or virtual) after all video courses have been completed. When required, Safeguarding Applicants will receive an email invitation to sign up for Universal Engagement training.
- All Safeguarding training for a position must be renewed every five (5) years.

In addition to the assigned video courses, Praesidium Academy hosts many other online courses. The Safeguarding Office has recommended additional videos for some positions. Extra recommended courses are **not required** to meet Safeguarding qualifications, and the **Safeguarding Records System (SRS) does not track the completion of these videos or count them toward training requirements**, even if an organization chooses to require an employee or volunteer to take a recommended video course(s).

Below are the training requirements by position, along with renewal requirements, and a list of recommended video courses for additional training.

1. Head of/Supervisor/SRA/SC/Trainer

Universal Engagement Training (required every 5 years)

Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Power and Relationships

- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect
- Add-On for Trainers: Safe Church, Safe Communities Specialty Training: Pastoral Relationships
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas
- Add-On for Ministry with Vulnerable Adults: Safe Church, Safe Communities Specialty Training: Pastoral Relationships

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect
- Add-On for Employees and Volunteers Who Serve in Staff Positions and for Trainers: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

Recommended video courses (not required):

- Recognizing Abuse and Exploitation in Elder Serving Programs
- Preventing Sexual Activity Among Young Children
- Preventing Sexual Activity Among Adolescents
- Preventing Bullying (Generic-Youth Org)
- Keeping Your School Safe
- Keeping Your Camp Safe
- Keeping Your Church Safe
- Social Media Safety

2. Administrator/Facilities/Security (non-supervisory)

No Universal Engagement Training required Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries

- Safeguarding Your Community: A Universal Review of the Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas
- Add-On for Direct Ministry to Vulnerable Adults: Safe Church, Safe Communities Specialty Training: Pastoral Relationships
- Add-On for Governance: Safe Church, Safe Communities Specialty Training: Power and Relationships

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of the Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

3. Lay Minister/Teacher/Coach/Counselor (non-supervisory, including vendors in these roles)

Universal Engagement Training required (every 5 years)

Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

- Add-On for Ministry with Vulnerable Adults: Safe Church, Safe Communities Specialty Training: Pastoral Relationships
- Add-On for Governance: Safe Church, Safe Communities Specialty Training: Power and Relationships

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect
- Add-On for Persons Who Minister to Vulnerable Adults: Safe Church, Safe Communities Specialty Training: Pastoral Relationships
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

Recommended videos (not required):

- Recognizing Abuse and Exploitation in Elder Serving Programs
- Preventing Sexual Activity Among Young Children
- Preventing Sexual Activity Among Adolescents
- Preventing Bullying (Generic-Youth Org)
- Keeping Your School Safe
- Keeping Your Camp Safe
- Keeping Your Church Safe
- Social Media Safety

4. Governance—Vestry, Bishop's Committee, Board

No Universal Engagement Training required (Except for Wardens; see below)

Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies

- Safe Church, Safe Communities Specialty Power and Relationships
- Safeguarding Your Community: A Review of the Episcopal Diocese Texas Policies for Vestries, Bishop's Committees and Governing Boards

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safeguarding Your Community: A Review of the Episcopal Diocese Texas Policies for Vestries, Bishop's Committees and Governing Boards

Recommended videos

- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect

5. Warden

Universal Engagement Training (every 5 years)

Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Power and Relationships
- Safeguarding Your Community: A Review of the Episcopal Diocese Texas Policies for Vestries, Bishop's Committees and Governing Boards

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Power and Relationships
- Safeguarding Your Community: A Review of the Episcopal Diocese Texas Policies for Vestries, Bishop's Committees and Governing Boards

Recommended videos (not required):

- Safe Church, Safe Communities Specialty Training: Pastoral Relationships
- Safe Church, Safe Communities Specialty Training: Bullying

- Safe Church, Safe Communities Specialty Training: Abuse and Neglect

6. Treasurer

No Universal Engagement Training required Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies

Videos required for renewal (every 5 years):

- Safe Church, Safe Communities Specialty Power and Relationships
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies

Recommended videos (not required):

- Safe Church, Safe Communities Specialty Training: Bullying
- Safe Church, Safe Communities Specialty Power and Relationships

7. Vendor/Contractor (recurrent presence but no direct interaction)

No Universal Engagement Training required Videos required for initial training:

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies **OR** Special Live Policy Review (with consent of Safeguarding Office)

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies **OR** Special Live Policy Review (with consent of Safeguarding Office)

8. Key Holder

No Universal Engagement Training required Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies

Recommended videos (not required):

- Safe Church, Safe Communities Specialty Training: Abuse and Neglect

(Note to SRA: When starting the SRS process, select “Yes” for “Is this screening for recertification?” to avoid full process.)

9. Clergy, Clergy Student (contact the Safeguarding Office for SRA support) **Universal Engagement Training for Clergy** (required every 5 years) **Videos required for initial training:**

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safe Church, Safe Communities Specialty Training: Bullying
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

Videos required for renewal (every 5 years):

- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Power and Relationships
- Safe Church, Safe Communities: Pastoral Relationships
- Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

Recommended videos (not required):

- Recognizing Abuse and Exploitation in Elder Serving Programs
- Keeping Your Church Safe
- Safe Church, Safe Communities Specialty Training: Bullying (for renewal)
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect (for renewal)

10. Camp Allen Summer Staff

Universal Engagement Training required Videos required for initial training:

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying (for renewal)
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect (for renewal)
- Keeping Your Camp Safe
- Preventing Sexual Activity Among Young Children
- Preventing Sexual Activity Among Adolescents
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

Online videos required for renewal

- Safe Church, Safe Communities Universal Training: Introduction and Theological Background
- Safe Church, Safe Communities Universal Training: Healthy Boundaries
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies
- Safe Church, Safe Communities Specialty Training: Bullying (for renewal)
- Safe Church, Safe Communities Specialty Training: Abuse and Neglect (for renewal)
- Keeping Your Camp Safe
- Preventing Sexual Activity Among Young Children
- Preventing Sexual Activity Among Adolescents
- Add-On for Employees and Volunteers Who Serve in Staff Positions: Safeguarding Your Community: Preventing Sexual Harassment in the Workplace for Employees and Volunteers in the Episcopal Diocese of Texas

11. Safeguarding Office Assigned (SOA)

Training as assigned by the Safeguarding Office.

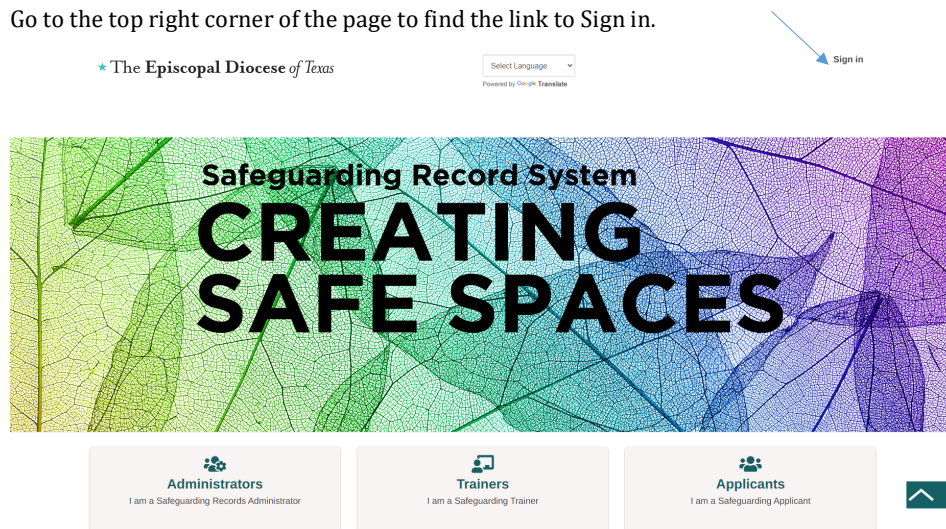
Accessing Safeguarding Records System (SRS) for SRAs and Trainers

Access the Safeguarding Records System (SRS) website by using the following URL:

<https://usher.epicenter.org/safeguarding>

The link will bring you to the following page:

Go to the top right corner of the page to find the link to Sign in.



It will bring you to the Sign In box:

Sign In

Username

Required

Password

Required

[Forgot username?](#) | [Forgot password?](#)

If you forgot your password, please use "forgot Password?" link below the "Sign in" button.

If you still have issues, please contact ushersupport@epicenter.org
Provide your name and email

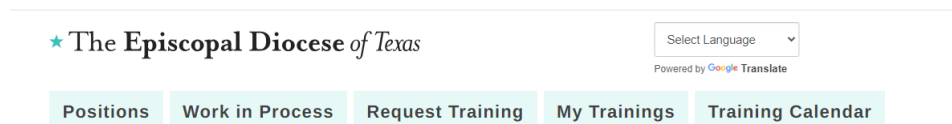
Enter your email address as your Username. If you have been provided your password, then enter your password and click on Sign in.

If you do not have your password, click on Forgot Password, and follow the directions.

If that doesn't work, click on Forgot Username, and follow the directions.

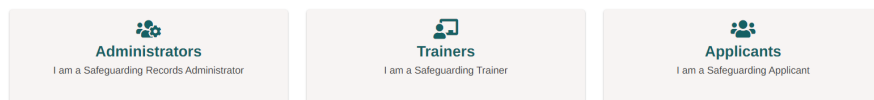
If that doesn't work contact ushersupport@epicenter.org and ask for assistance with someone In the Safeguarding Office.

You should then see five tabs at the top of your page:

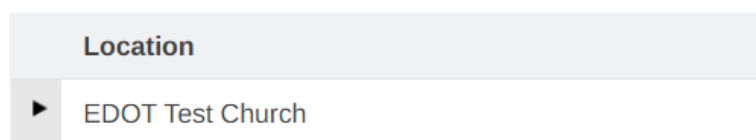


Contact the Safeguarding office if you do not have five tabs.

You can enter the workspace by clicking on one of the three buttons at the bottom of the screen depending on your reason at the time. SRAs will usually use Administrators, Trainers will usually use Trainers. You can access your own information through the Applicant button.



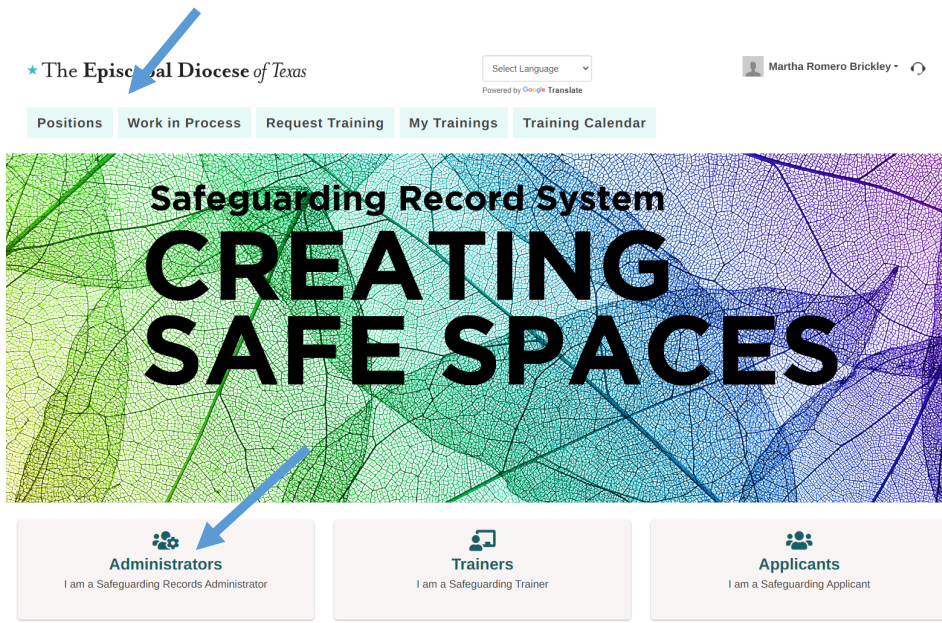
Click on the Administrators tab and scroll to the bottom of the page. Check to see that all of the locations that you are SRA for are listed:



If your location(s) are not showing, please contact the Safeguarding office.

Search for People / Determining Status

1. Click on the Administrators button or on the Positions tab.



It will open to the same page.

Add New Position
Search People

Locate an existing contact or add a new contact from the options below. Click on the name of the contact to add a new position for the selected individual.
If no record was found by name, check email address before adding a contact to make sure that no duplicates are created.

Global Search

First or Informal Contains:

* Last Name Contains:

OR Email Equals:

Find

Please enter your search criteria to view results

If an email address is not correct, please submit the person's name, correct email address and ID to updates@episcopes.org and request that the email address be updated. You will receive a confirmation email when the email has been updated.

Add new contact

Find existing contact

First Name Contains:

Last Name Contains:

At Equals:

Find

2. The first action needed is to find out if the person is already in SRS.
3. The next step is to determine if they have a current certification or have met requirements for their position.
4. If they are not currently certified or have not met requirements they must be started in a process by position.
5. Go to Global Search.
6. Then enter First and Last Name and click Find:

Global Search

First or Informal Contains

* Last Name Contains

OR Email Equals:

Find

Please enter your search criteria to view results

7. If no information comes up, as in the example below saying, "There are no records", then you will need to add them to the system:

Global Search

First or Informal Contains

* Last Name Contains

OR Email Equals:

Find

Tip: Be sure that you look for the person by their official legal name and by their informal/nickname or any other rendition of their name so that we don't create duplicates. If you locate a duplicate, please inform the Safeguarding office so that they can be merged.

8. If the person is already in the system, you will find legacy certification information from the old Safeguarding System and new positions as they complete:

Id	First Name	Last Name	Informal	Position	Status	Certification	ValidTo	Email	Organization
77668	Danielle	Tatro	Danielle	Antiracism Lighting the Path in EDOT	Met			dtatro@epicenter.org	Episcopal Diocese of Texas
77668	Danielle	Tatro	Danielle	Employee: Preventing Sexual Harassment	Met			dtatro@epicenter.org	Episcopal Diocese of Texas
77668	Danielle	Tatro	Danielle	Lay Head Of/Supervisor/SRA/Coordinator/Trainer	Met			dtatro@epicenter.org	Episcopal Diocese of Texas
77668	Danielle	Tatro	Danielle			Safeguarding God's Children		dtatro@epicenter.org	Episcopal Diocese of Texas

You can see from the illustration above that the applicant is already certified and does not need to be started in a new process. If her dates showed her certifications as expired, she would need to start a new process.

Tip: Be sure to check that the person's name is spelled correctly, that their email address is current, and that the Organization is correct as you are checking the Valid To dates.

In this example, all is correct, but the Valid To date shows that this certification has expired.

Id	First Name	Last Name	Informal	Position	Status	Certification	ValidTo	Email	Organization
77668	Danielle	Tatro	Danielle			Safeguarding God's Children	6/8/2019	dtatro@epicenter.org	Episcopal Diocese of Texas

In this case, the position's requirements have not yet been met as there is no ValidTo date:

Id	First Name	Last Name	Informal	Position	Status	Certification	ValidTo	Email	Organization
77668	Danielle	Tatro	Danielle			Safeguarding God's Children		dtatro@epicenter.org	Episcopal Diocese of Texas

If the person is in the system, but no certification information is provided, you will need to start them in a process.

Add New Contact

After searching for a person and not finding them in the system, you will need to add them as a new contact to the system. This creates their account.

On the Add New Position page click on the button:

Add new contact

It will open to this page:

Please fill in all the fields below to create an account.

* What is the first name?

* What is the last name?

* What is the email address?

enter valid email address

* What is their organization?

(None) ▼

Password must be at least 7 characters long and contain both letters and numbers.

Applicant will be prompted to reset password during their first login attempt.

* Please enter a password.

* Please re-enter password.

Create Account

When entering a new contact you will enter:

First Name: use their official, legal name, they will have a chance to enter a nickname themselves.

Last Name: again, their official, legal name.

Email: be sure that this is a unique email address and that they are not sharing it with someone else using the system. This is important because their email address will be established as their Username and will also affect access to Praesidium Academy for online courses.

Organization: this is a drop-down menu. Click the organization that applies if it is not already chosen.

Password: choose 7 characters that contain both letters and numbers. The applicant will never see this, so it doesn't matter what you choose. This simply allows the system to set up the applicant's credentials. The applicant will be prompted to resent the password during their first login attempt.

Then click: Create Account

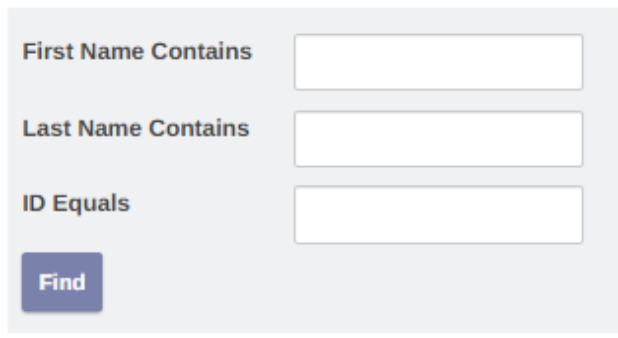
Create Account

Add a Position for an Applicant

After you have found an applicant by query to make sure they are in the system or after adding them as a new contact, the next step is to start their Safeguarding process by adding a position.

From the Add New Position page, scroll to the bottom of the page to Find Existing Contact:

Find existing contact

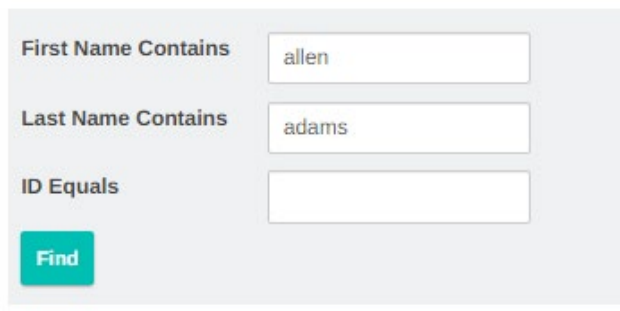


A screenshot of a web form titled "Find existing contact". The form has three input fields: "First Name Contains", "Last Name Contains", and "ID Equals". Each field is empty. Below the fields is a blue button labeled "Find".

Enter the First and Last name of the person you want to start in a position or the ID. You do not have to enter all three. The ID can be found in the Global Search table.

And click the Find button:

Find existing contact



A screenshot of the same "Find existing contact" form. The "First Name Contains" field now contains the text "allen" and the "Last Name Contains" field contains the text "adams". The "ID Equals" field remains empty. The "Find" button is now green.

When you click the Find button, the location of the applicant will pop up below with an arrow to the left of it:

Location	
▶	EDOT Test Church

Click on the arrow and the person's name will appear. The line underneath indicates that it is a link. Click on the link:

Location	
▼	EDOT Test Church
Name	
Allen Adams	

It will be on the Positions page:

★ The Episcopal Diocese of Texas

Select Language
▼

Powered by Google Translate

Positions

Work in Process

Request Training

My Trainings

Training Calendar

Safeguarding Home » Positions » Add New Position

Positions

Click on the Position Category

Positions

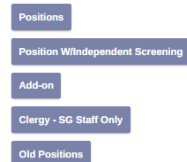
Position W/Independent Screening

Add-on

1. Click on the Position Category that is appropriate for your applicant:

Add New Position

If your organization does not have an Independent Screening Agreement, choose Positions, If you have an ISA choose Positions (ISA)--- Click on the Position Category



Positions

Position W/Independent Screening

Add-on

Clergy - SG Staff Only

Old Positions

Positions: this category is for all positions that require a full screening or screening for recertification.

Full Screening requirements include:

1. Interview
2. Application including references and a consent for the background check
3. Background check
4. References

Recertification Screening: (to be reviewed and approved)

1. Application with a consent for the background check
2. Background check

Positions W/Independent Screening: this category is to be used for an organization who has a current Independent Screening Agreement on file with the Safeguarding office.

Tip: When using this category, never click yes on the Recertification question. If you do this will trigger the requirement of a background check. So, never, never click on it!!

Add-on: This category is used when a person moves from one position into another position and may require additional screening and/or training.

Clergy – SG Staff Only: As indicated this category is for use by the Safeguarding staff only. Specifically, Danielle Tatro is the SRA for all clergy. If you have any questions or concerns about a clergy person's Safeguarding status in your organization, please consult with Danielle.

Old Positions: This holds a record of the initial positions that were used in the system. This category will eventually be removed but is available for reference if needed. **Do not use it.**

2. For this example, we chose the Positions category. After the category is chosen, click on the Position drop-down menu:

Name Aaaaaa Aaaaaa

* Position (None) ▼

Is this a recertification?

Location

* Email

Save

(None)
 Administrator/Facilities/Security Staff (non-supervisory)
 Governance: Vestry, Bishop's, Committee, Board
 Key Holder
 Lay Head Of/Supervisor/SRA/SGC/SG Trainer
 Lay Minister/Teacher/Coach/Counselor
 Regular Vendor/Contractor (no direct interaction)
 Safeguarding Office Assigned
 Treasurer
 Wardens

Choose the position that applies:

(None)
 Administrator/Facilities/Security Staff (non-supervisory)
 Governance: Vestry, Bishop's, Committee, Board
 Key Holder
 Lay Head Of/Supervisor/SRA/SGC/SG Trainer
 Lay Minister/Teacher/Coach/Counselor
 Regular Vendor/Contractor (no direct interaction)
 Safeguarding Office Assigned
 Treasurer
 Wardens

It will fill in the field:

* Position Lay Minister/Teacher/Coach/Counselor ▼

Then, because this **is not** a location with an Independent Screening Agreement, choose if it is a screening recertification or not; be sure the correct email is noted and click Save.

Name	Allen Adams
* Position	Lay Minister/Teacher/Coach/Counselor ▼
Is this a screening recertification?	No ▼
Location	EDOT Test Church
* Email	aadams@mailinator.cor

Save

Bishop's Approval

Bishop's Approval is a special designation that allows a background check to be run for a person who does not have a Social Security number.

It is not for a person who does not want to submit their Social Security number.

For this option to be used, the organization must have the Bishop's Approval notation in our system. If you are unsure if your organization has this, and you need this option, please contact the Safeguarding Office.

The option will show up on the Add New Position Page, check the box if you are choosing this option:

Add New Position

If your organization does not have an Independent Screening Agreement, choose Position

Positions

Position W/Independent Screening

Add-on

Clergy - SG Staff Only

Old Positions

Name	Allen Adams
* Position	(None) ▼
Bishops Approval?	<input type="checkbox"/>
Is this a screening recertification?	No ▼
Primary Location	EDOT Test Church
* Email	aadams@mailinator.cor

Save

Any positions that the person already has in process or has met requirements for will show up at the bottom of the page under Existing positions:

Existing positions

Position	Started	Screening valid thru	Specialized training valid thru	Universal training valid thru
Lay Minister/Teacher/Coach/Counselor (ISA)	2/22/2024		2/22/2027	

This is a good opportunity to make sure you are not duplicating a position and to confirm expiration dates for existing certifications or positions.

In instructional note about **Start Dates**:

The start date is set for all positions and indicates when the process was started. The timing of how quickly that populates may vary a little.

1. For positions that do not require screening, both the start and deadline dates are set via a system (iDMS) update that is called when the process is first saved so it should be populating right away.
2. For positions that require screening, if they are already in Praesidium, the start date is set similarly at the initial save (but not the deadline).
3. For users that need screening and also are sent to Praesidium to be added as a new user, the Praesidium integration sets the start date. The integration runs every 5 minutes so there may be a delay.

For 2 & 3, the deadline is set by an iDMS update when the interview is set to approved.

Adding Multiple Applicants to One Position At One Time

Overview: Adding multiple applicants to one position

In some cases, an SRA needs to add multiple people to one position for their locations. To accomplish this without adding each position individually, a set of forms and automated processes has been developed.

For New Contacts: Add any new contacts not already in the system so that you can select them for the position during the process.

Existing Contacts: The opportunity will be provided to correct any email addresses for existing applicants during the following process. Please notify the USHERSupport@epicenter.org of any changes to existing email addresses so that the username and Praesidium accounts are updated as well.

Next, Select the Positions Tab and choose "Add Multiple positions"

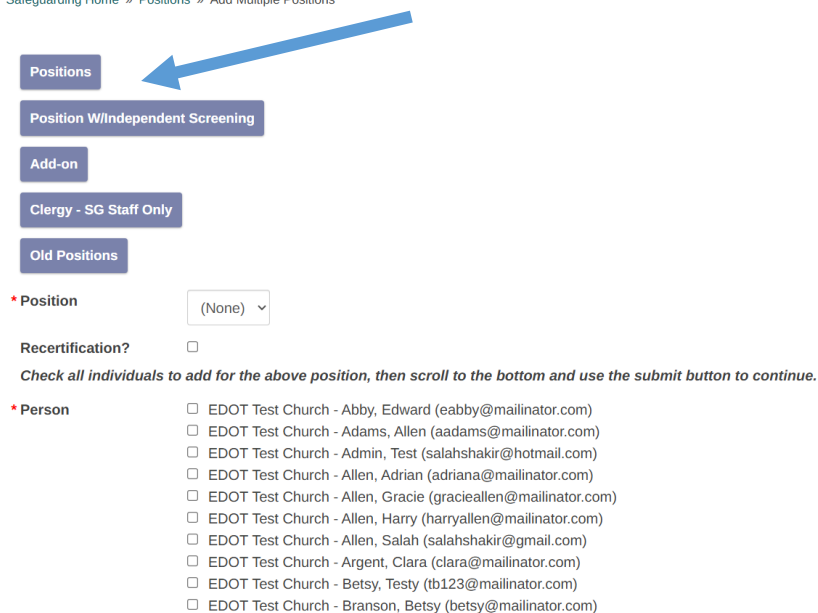
★ **The Episcopal Diocese of Texas**



It will take you to the page where you will be able to select the position and select the multiple applicants.

Choose the position by selecting a category. A box will open with positions to choose from. Select the position and then choose yes or no for Recertification as it applies.

Safeguarding Home » Positions » Add Multiple Positions



The screenshot shows the 'Add Multiple Positions' page. On the left, there is a vertical menu with buttons: 'Positions', 'Position W/Independent Screening', 'Add-on', 'Clergy - SG Staff Only', and 'Old Positions'. A blue arrow points to the 'Positions' button. Below the menu, the 'Position' dropdown is set to '(None)'. The 'Recertification?' checkbox is unchecked. Below this, a text instruction reads: 'Check all individuals to add for the above position, then scroll to the bottom and use the submit button to continue.' Under the '* Person' section, there is a list of 13 individuals, each with an unchecked checkbox and their name and email address.

Positions

Position W/Independent Screening

Add-on

Clergy - SG Staff Only

Old Positions

* Position (None) ▾

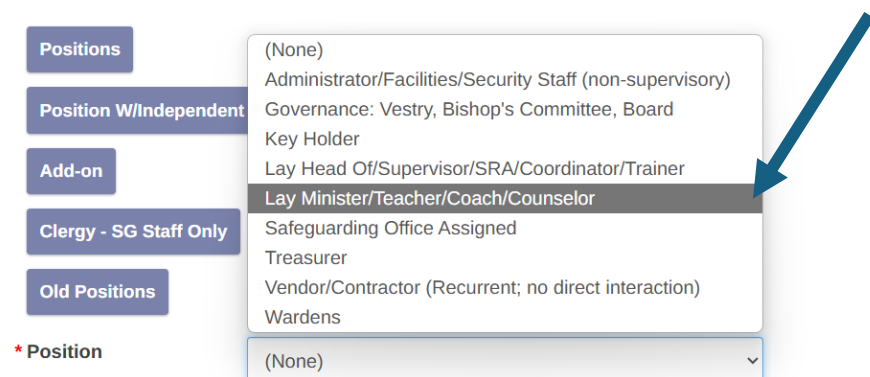
Recertification? ☐

Check all individuals to add for the above position, then scroll to the bottom and use the submit button to continue.

* Person

- ☐ EDOT Test Church - Abby, Edward (eabby@mailinator.com)
- ☐ EDOT Test Church - Adams, Allen (aadams@mailinator.com)
- ☐ EDOT Test Church - Admin, Test (salahshakir@hotmail.com)
- ☐ EDOT Test Church - Allen, Adrian (adriana@mailinator.com)
- ☐ EDOT Test Church - Allen, Gracie (gracieallen@mailinator.com)
- ☐ EDOT Test Church - Allen, Harry (harryallen@mailinator.com)
- ☐ EDOT Test Church - Allen, Salah (salahshakir@gmail.com)
- ☐ EDOT Test Church - Argent, Clara (clara@mailinator.com)
- ☐ EDOT Test Church - Betsy, Testy (tb123@mailinator.com)
- ☐ EDOT Test Church - Branson, Betsy (betsy@mailinator.com)

Safeguarding Home » Positions » Add Multiple Positions



The screenshot shows the 'Add Multiple Positions' page with the 'Positions' dropdown menu open. The menu lists various roles, with 'Lay Minister/Teacher/Coach/Counselor' highlighted. A blue arrow points to this option. The 'Position' dropdown at the bottom is still set to '(None)'.

Positions

Position W/Independent Screening

Add-on

Clergy - SG Staff Only

Old Positions

(None)

Administrator/Facilities/Security Staff (non-supervisory)

Governance: Vestry, Bishop's Committee, Board

Key Holder

Lay Head Of/Supervisor/SRA/Coordinator/Trainer

Lay Minister/Teacher/Coach/Counselor

Safeguarding Office Assigned

Treasurer

Vendor/Contractor (Recurrent; no direct interaction)

Wardens

* Position (None) ▾

Then check off the applicants that need to be started in the position. The list will display all of those who are eligible to be added from your organization. If you do not see an applicant's name, go back to "Add New Contact" and add them.

Add-on
Clergy - SG Staff Only
Old Positions

* Position
Lay Minister/Teacher/Coach/Counselor

Recertification?
☐

Check all individuals to add for the above position, then scroll to the bottom and use the submit button to continue.

* Person
☒ EDOT Test Church - Abby, Edward (eabby@mailinator.com)
☐ EDOT Test Church - Adams, Allen (aadams@mailinator.com)
☐ EDOT Test Church - Admin, Test (salahshakir@hotmail.com)
☒ EDOT Test Church - Allen, Adrian (adriana@mailinator.com)
☒ EDOT Test Church - Allen, Gracie (gracieallen@mailinator.com)
☒ EDOT Test Church - Allen, Harry (harryallen@mailinator.com)
☒ EDOT Test Church - Allen, Salah (salahshakir@gmail.com)
☐ EDOT Test Church - Argent, Clara (clara@mailinator.com)
☒ EDOT Test Church - Betsy, Testy (tb123@mailinator.com)
☐ EDOT Test Church - Branson, Betsy (betsy@mailinator.com)
☐ EDOT Test Church - Branson, Bonnie (bonnie@mailinator.com)
☒ EDOT Test Church - Branson, Brad (brad@episcopalteam.testinator.com)
☒ EDOT Test Church - Branson, John (johnbranson@mailinator.com)
☐ EDOT Test Church - Branson, Nick (nickb@mailinator.com)

After you have completed checking off all of those to be entered, scroll to the bottom of the form, select "Select for Review".

☐ Episcopal Diocese of Texas - Turnbull, Zainab (zturnbull@epicenter.org)
☐ Episcopal Diocese of Texas - Vela, Lillian ()
☐ Episcopal Diocese of Texas - Villarreal, Daniel (dvillarreal@epicenter.org)
☐ Episcopal Diocese of Texas - Watson, Jim ()
☐ Episcopal Diocese of Texas - Weaver, Daniel (mr.danielaweaver@gmail.com)
☐ Episcopal Diocese of Texas - Young, Duane Lanier (lanier@thewheelhouse.org)
☐ Episcopal Diocese of Texas - Zamora, Sandra ()

Submit for review

Review and confirmation form

A confirmation page loads with all the pending submissions for the logged in SRA. Each form submission has a submission ID with the positions to be added in that form. You may have to use the scroll bar at the bottom of the page to see all the columns. (We are working on having all columns available without having to scroll.)

Note: the form is for all selections that are included in the submission number of the row selected. For example, if Ben and Allen have submission number 26, and Jane and Jamie have submission number 27, then editing Allen's row will result in pulling up the entire form for submission 26, including selections for Ben and Allen.

ID To Insert	Name	Email	Update Email	Location	Position	Recertification	Submission	Update submission	SRA Name
118742	Ben Franklin	ben@mailinator.com	Edit	EDOT Test Church	Governance: Vestry, Bishop's Committee, Board	False	26	Edit	Jane TestSRA
120358	Allen Adams	adams@mailinator.com	Edit	EDOT Test Church	Governance: Vestry, Bishop's Committee, Board	False	26	Edit	Jane TestSRA
118750	Jane Smith	jane@mailinator.com	Edit	EDOT Test Church	Lay Head Office/Supervisor/SRA/Coordinator/Trainer	False	27	Edit	Jane TestSRA
118726	Jamie KlineTest	jk@mailinator.com	Edit	EDOT Test Church	Lay Head Office/Supervisor/SRA/Coordinator/Trainer	False	27	Edit	Jane TestSRA

Please review the positions listed above, and correct or edit any missing email addresses. You can also click on the 'edit' link in the 'Update submission' column to adjust the list of people to include. When you have finished reviewing the list, click on the 'submit' button below to send the names to be processed by the system.

Cancel

Email:

Confirm and Submit

Edit selections

Edit email address

Clicking on the 'Edit' button in the 'Update email' column brings you to a form where you can enter or update the email address for the selected person.

Name: Bonnie Branson

Location: EDOT Test Church

Email:

Submit

If you edit an existing email, please contact the Safeguarding Office to alert them that the Usernames and Praesidium Accounts need to also be updated.

Edit applicant selection

Clicking on the 'Edit' button in the 'Update submission' column brings you back to an update form for that submission and allows you to change the selections.

*** Position** Lay Minister/Teacher/Coach/Counselor ▼

Recertification? ☐

Review and confirm all individuals to add for the above position, checking or unchecking to adjust if necessary. When done, scroll to the bottom and use the update button to submit updates, or the cancel button to discard any changes.

Person

- ☒ EDOT Test Church - Abby, Edward (eabby@mailinator.com)
- ☐ EDOT Test Church - Adams, Allen (aadams@mailinator.com)
- ☐ EDOT Test Church - Admin, Test (salahshakir@hotmail.com)
- ☒ EDOT Test Church - Allen, Adrian (adriana@mailinator.com)
- ☒ EDOT Test Church - Allen, Gracie (gracieallen@mailinator.com)
- ☒ EDOT Test Church - Allen, Harry (harryallen@mailinator.com)
- ☒ EDOT Test Church - Allen, Salah (salahshakir@gmail.com)
- ☐ EDOT Test Church - Argent, Clara (clara@mailinator.com)
- ☒ EDOT Test Church - Betsy, Testy (tb123@mailinator.com)
- ☐ EDOT Test Church - Branson, Betsy (betsy@mailinator.com)

After the updates have been made, click on the "Update" button at the bottom of the page, or click on "Cancel".

- ☐ Episcopal Diocese of Texas - Young, Duane Lanier (lanier@thewheelhouse.org)
- ☐ Episcopal Diocese of Texas - Zamora, Sandra ()

Update

Cancel

When done reviewing, click on the 'Confirm and Submit' button to process all the pending position inserts listed on the screen above.

Please review the positions listed above, and correct or edit any missing email addresses. You can also click on the 'edit' link in the 'Update submission' column to adjust the list of people to include. When you have finished reviewing the list, click on the 'submit' button below to send the names to be processed by the system.

Cancel

ID 1749

Name Martha Romero Brickley

Email mbrickley@epicenter.or

Confirm and Submit

Work in Process

1. Click on the Work in Process Tab

★ **The Episcopal Diocese of Texas**

Positions **Work in Process** **Request**

2. You can work from the Work in Process Tab or the Applicant's Tab:

[Safeguarding Home](#) » [Work in Process](#)

Work in Process

Work in Process Applicants

3. Work in Process Tab provides the components of screening:

Interview

Application

Background Check

References

Work in Process

Work in Process Applicants

Interview

This query ran for 2.62 seconds. [Read more on how to build faster queries.](#)

Interview	Total
▶ Not Started	16
▶ n/a	79
▶ Approved	39
▶ In progress	1

Application

This query ran for 3.33 seconds which could cause performance issues in MIS. Please review the [best practices for writing IQA queries.](#)

Application	Total
▶ Sent Back	1
▶ Not Started	30
▶ n/a	89
▶ Submitted	2
▶ Approved	13

Background Check

This query ran for 3.78 seconds which could cause performance issues in MIS. Please review the [best practices for writing IQA queries.](#)

Background Check	Total
▶ Not Started	32
▶ n/a	91
▶ Approved	7
▶ In progress	5

References

This query ran for 2.85 seconds. [Read more on how to build faster queries.](#)

Reference Check	Total
▶ Not Started	29
▶ n/a	86
▶ Approved	20

Each component will provide rows to show component status. For instance:

Work in Process		Applicants
Interview		
Interview		Total
▶	Approved	76
▶	In progress	1
▶	n/a	196
▶	Not Started	31

To work on a component, click on the arrow to the left and it will open:

Interview		Total
▼	Not Started	16
Name		Position
Allen Adams		Lay Minister/Teacher/Coach/Counselor
Allen Adams		Head of School

Click on a name (the line under it indicates it is a link). You will be redirected to the Applicant's information page where you can do things like conduct an interview or approve an application or background check and check training progress.

Work in Process

Applicant Information

Name	Allen Adams ID: 120358
Position	Lay Minister/Teacher/Coach/Counselor
Recertification	No
Bishop Appr	No
Requirements	Unmet
Email	aadams@mailinator.com
Location	EDOT Test Church
SRA	Katherine Muhlenbruch
Start Date	2/10/2025
Deadline	5/4/2025

4. Applicant's Tab

You can search by person or by scrolling through the list below.

Work in Process

Work in Process

Applicants

First Name Contains

Last Name Contains

Company Contains

Requirements Status

Unmet

Find

Name	ID	Position	Due Date	Interview	Application	Background Check	References	Recert	Universal Training Valid Thru Date	Specialized Training Valid Thru Date	Li N
Edward Abby	123108	Employee: Preventing Sexual Harassment	3/13/2025	n/a	n/a	n/a	n/a	No			
Edward Abby	123108	Legacy Safeguarding God's People Preventing Sexual Harassment		n/a	n/a	n/a	n/a				
Allen Adams	120358	Lay Minister/Teacher/Coach/Counselor	5/4/2025	Approved	Not Started	Not Started	Not Started	No		4/30/2029 12:00:00 AM	

Enter First Name, Last Name and the appropriate status, then click Find:

First Name Starts With

Last Name Starts With

Requirements Status

Note: The Status options are-

Met

(Any)

Met

Unmet

Deactivated

Archive

Unmet: Automatically lists those currently working on meeting requirements for a position, and their deadline has not yet passed.

Met: Automatically lists those who have met all requirements for a position.

Deactivated: Automatically lists those who have not met their requirements, and their deadline has passed.

Archive: Used when an applicant's position is not complete and/or is no longer needed. In many cases the screening and training information needs to be kept for historical purposes and so that we do not have to duplicate current screening already complete when a new position is started. This status is not automatic. When an SRA wants a process archived, they must request it by contacting the Safeguarding office.

Again, select the Status and click Find. The person's name will pop up below. You can get a quick look at the progress here:

Name	ID	Position	Due Date	Interview	Application	Background Check	References	Recertification
------	----	----------	----------	-----------	-------------	------------------	------------	-----------------

Paul Powers	119794	School Volunteer w Children/Youth	Not Started	Not Started	Not Started	Not Started	No
-----------------------------	--------	-----------------------------------	-------------	-------------	-------------	-------------	----

The list also shows, to the right of Recertification, training Valid Thru dates. You may have to use the horizontal scroll bar at the bottom to open the table to see these:



Universal Training Valid Thru Date	Specialized Training Valid Thru Date
---	---

The person's name is a link that you can click on to open their WIP Applicant Information page.

Allen Adams	120358	Lay Minister/Teacher/Coach/Counselor	Not Started	Not Started	Not Started	Not Started
-----------------------------	--------	--------------------------------------	-------------	-------------	-------------	-------------

The link opens to the WIP Applicant Information page.

Work in Process

Applicant Information

Name Allen Adams ID: 120358
Position Lay Minister/Teacher/Coach/Counselor
Recertification No
Bishop Appr No
Requirements **Unmet**
Email aadams@mailinator.com
Location EDOT Test Church
SRA Martha Romero Brickley
Start Date 6/3/2025
Deadline

At A Glance	Required	Valid From	Valid Thru
Screening	Yes		
Universal Training	Yes		
Specialized Training	Yes		

Screening	Required	Status	Approved
Interview	Yes	Not Started	
Application	Yes	Not Started	
Background Check	Yes	Not Started	
Reference Checks	Yes	Not Started	

Process Menu:

[Interview](#)[Application and Background Check Consent](#)[Background Check](#)[Reference Checks](#)

Training Components

[Screening](#) [Universal Training](#) [Specialized Training](#)

Component	Completion Date
Screening	
BackgroundCheck	

All positions

Position	Requirements
Administrator/Facilities/Security Staff (non-supervisory) (ISA)	Met
Administrator/Facilities/Security Staff (non-supervisory) (ISA)	Met
EDOT Policy Review	Met

Review the page as follows:

1. Double check that the name is displaying correctly.
2. To the right of the name is their ID. Please include this with any correspondence about this applicant if assistance is needed with their process.
3. You can verify the following information:
 - a. Position
 - b. Recertification
 - c. Bishop's Approval
 - d. Requirements as Unmet or Met
 - e. Email address

- f. Location
- g. SRA
- h. Start date of the process
- i. Deadline (this will fill in after the interview)

For all tables mentioned below, the dates will fill in as the parts complete.

At A Glance status review:

At A Glance	Required	Valid From	ValidThru
Screening	Yes		
Universal Training	Yes		
Specialized Training	Yes		

Screening component status:

Screening	Required	Status	Approved
Interview	Yes	Not Started	
Application	Yes	Not Started	
Background Check	Yes	Not Started	
Reference Checks	Yes	Not Started	

And Required Components status:

Required Components

Screening	Universal Training	Specialized Training						
<table><tr><th>Component</th><th>Completion Date</th></tr><tr><td>Screening</td><td></td></tr><tr><td>BackgroundCheck</td><td></td></tr></table>			Component	Completion Date	Screening		BackgroundCheck	
Component	Completion Date							
Screening								
BackgroundCheck								

If you click on Universal Training the required courses will display:

Required Components

Screening

Universal Training

Specialized Training

Required Courses

This query ran for 1.16 seconds. [Read more on how to build](#)

CourseCode	CourseTitle	Source	Completion Date
CON30050ENUS	Safe Church, Safe Communities - Universal Training: Introduction & Theological Background (ENG) (ES)	PRAESIDIUM	
CON30054ENUS	Safe Church, Safe Communities - Universal Training: Healthy Boundaries (ENG) (ES)	PRAESIDIUM	
CON50272EN	Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies (ENG) (ES)	PRAESIDIUM	
SAL	Universal Engagement Training	Calendar Event	

If you click on Specialized Training the required courses will display:

Required Components

Screening

Universal Training

Specialized Training

Required Courses

Company ID	CourseCode	CourseTitle	Source	Completion Date
119716	CON30052ENUS	Safe Church, Safe Communities - Specialty Training: Abuse & Neglect (ENG)	PRAESIDIUM	
119716	CON30053ENUS	Safe Church, Safe Communities - Specialty Training: Bullying (ENG) (ES)	PRAESIDIUM	

At the bottom of the page, you will find a list of positions that the person already has or is in process of meeting the requirements:

All positions

Position	Requirements
Head of School	Unmet
Lay Head Of/Supervisor/SRA/SGC/SG Trainer	Unmet

To the right on the page, you will find the Process Menu:

Process Menu:

Interview

Application and Background Check
Consent

Background Check

Reference Checks

You can click on each component to open it to complete or for review and approval.

INTERVIEW

The following is what appears on the interview page:

Interview

Name Wendy Weaver

Position Lay Minister/Teacher/Coach/Counselor

Location EDOT Test Church

SRA Martha Romero Brickley

Choose delegate

* Is the position volunteer or paid?

(None) ▼

☐ This person has been known to the congregation for 6 months.

What interests you about this position?

What has prepared you for this position, or what strengths, gifts, or experiences do you bring to this position?

With what children or youth activities or organizations have you been involved as a volunteer or employee? (Even if you are not currently applying for a position that works with children or youth, we ask this question because it's possible that you may be considered for such a position in the future, and we'd like to save you the trouble of a further interview.)

Is there anything that would prevent you from completing this process in the next 45 days?

Interviewer: Let the applicant know that if they have questions or need clarification during their process, they can contact their SRA or the Safeguarding Office. You may provide them with the SRAs name, email and/or phone number and the Safeguarding Office number of 512-478-0580.

Interview Approval Date

* Status

(None) ▼

Save

Review with applicant

- After our interview, you will receive:
 - an email with a link to an application and consent for a background check
 - a separate email with the training requirements and links to access training
 - both must be completed to serve in your position(s)
 - you will be able to track your progress in the system.
- Gather the following for your application:
 - Driver's License
 - Addresses where you've lived for the last seven years
 - Work or Volunteer history (whichever applies)
 - Four References, their phone numbers and email addresses
 - Your Social Security Number (Your Social Security Number will appear 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.)
- Training may consist of any or all of the following:
 - Online training through Praesidium Academy
 - Live training which can be taken virtually or in person
 - If live training is required, you will be directed to an Events Calendar to register.
- The application will ask whether you've ever been accused of physically, sexually, or emotionally abusing a child or adult. You will have a chance to explain a "yes" answer.
- 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 (SRA).
- **YOU HAVE 45 DAYS TO COMPLETE SCREENING AND TRAINING**

Is there anything that would prevent you from completing this process in the next 45 days?

Interviewer: Let the applicant know that if they have questions or need clarification during their process, they can contact their SRA or the Safeguarding Office. You may provide them with the SRAs name, email and/or phone number and the Safeguarding Office number of 512-478-0580.

Interview Approval Date

* Status

Save

You may close the tab to return to the main page.

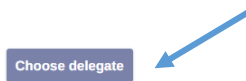
1. Select Choose delegate if you need to delegate the interview.
2. If not delegating the interview, proceed with the questions.
3. It is considered best practice to conduct the interview in person. It is understood that sometimes this is not possible. The next best practices, in order of preference, would be over Zoom or a comparable online option, a phone call and the last resort is by email. The reason for this is that the interview is one of the first times you get an impression of the person and where you may detect red flags. If anything arises of concern, talk it over with your Head of Congregation, School or Institution. You may also consult the Safeguarding office.

1. Delegating an Interview

- A. Click on the Choose Delegate Button:

Interview

Name Allen Adams
Position Lay Minister/Teacher/Coach/Counselor
Location EDOT Test Church
SRA Martha Romero Brickley



- B. Delegate Lookup. Enter the name of the person to whom the interview is being delegated and click Find.

Delegate Lookup

A screenshot of a "Delegate Lookup" form. It has two input fields: "First Name Equals" with the text "Tracy" and "Last Name Equals" with the text "Cramer". Below these fields is a purple button labeled "Find".

- C. The name as a link will appear below Find; click on it.

Delegate Lookup

A screenshot of the "Delegate Lookup" form after a search. The "First Name Equals" field contains "Tracy" and the "Last Name Equals" field contains "Cramer". The "Find" button is now green. Below the form, a link is displayed: "Mr. Tracy Frank Cramer (tcramer@epicenter.org)".

- D. Click on Save Delegate Selection. See directions in the screenshot below to undelegate an interview as well.

Interview

Lookup delegate

Undelegate Interview ☐

Save delegate selection

Use the 'save delegate selection' button above to save the delegate selected on the previous page.

To undelegate, enable the 'undelegate interview' checkbox, and then press the 'save undelegation' button.

- E. When you click on the Save delegate selection button, the name will appear on the right under Delegation:

Interview

Name Allen Adams
Position Lay Minister/Teacher/Coach/Counselor
Location EDOIT Test Church
SRA Martha Romero Brickley

Choose delegate

Undelegate

Is the position volunteer or paid?

Delegation

Delegated to

Mr. Tracy Frank Cramer

- F. Click on Undelegate to remove this delegation, then check the box to Undelete and click on Save undelegation:

Interview

Lookup delegate

Undelegate Interview ☒

Save undelegation

- G. Once delegated, the person to whom the interview was delegated will receive an email asking them to complete the interview.

The email will come from user@epicenter.org”:

Safeguarding: Interview for Allen Adams



usher@epicenter.org

To ○ Ana Gonzales May

The body of the email will look like this:

★ The **Episcopal Diocese** of *Texas*

Dear Ana,

You have been delegated to assist Safeguarding Records Administrator (SRA) Martha Romero Brickley with the Interview for Allen Adams.

Please click https://usher.epicenter.org/Shared_Content/Safeguarding-Forms/Interview.aspx?seqn=172006&id=120358&certid=172006 to access this interview.

If you need assistance, please contact your Safeguarding Records Administrator Martha Romero Brickley at mbrickley@epicenter.org or the Safeguarding Office at 512-478-0580.

Thank you,

The Safeguarding Office

The interviewer will need to click on the link provided in the email. Upon “sign in” the interviewer will be taken directly to the interview form. They will need to fill in the form and submit.

Interview

Name Allen Adams
Position Lay Minister/Teacher/Coach/Counselor
Location EDOT Test Church
SRA Martha Romero Brickley

Choose delegate

Undelegate

* Is the position volunteer or paid?

(None)

What interests you about this position?

What has prepared you for this position, or what strengths, gifts, or experiences do you bring to this position?

With what children or youth activities or organizations have you been involved as a volunteer or employee?
(Even if you are not currently applying for a position that works with children or youth, we ask this question because it's possible that you may be considered for such a position in the future, and we'd like to save you the trouble of a further interview.)

Delegation

Delegated to

Mr. Tracy Frank Cramer

Interviews that are delegated will now have the option when completing to select 'Submit back to SRA for review and approval'

* Status

(None)

(None)

Approved

Not approved

SAVE. I want to be able to return and edit information before finalizing.

Submit back to SRA for review and approval

And it will show up like this on the table when submitted back:

Screening	Required	Status	Approved
Interview	Yes	Submitted back	
Application	Yes	Not Started	
Background Check	Yes	Not Started	

You as the SRA should review the interview and approve by choosing the approved status:

Interviewer: Let the applicant know that if they have questions or need clarification during their process, they can contact their SRA or the Safeguarding Office. You may provide them with the SRAs name, email and/or phone number and the Safeguarding Office number of 512-478-0580.

Interview Approval Date
3/20/2025

* Status

Approved

When the interview is complete it will show up on the applicant's WIP page as approved:

Screening	Required	Status	Approved
Interview	Yes	Approved	03/20/2025
Application	Yes	Not Started	
Background Check	Yes	Not Started	
Reference Checks	Yes	Not Started	

Once the interview is approved, the applicant will be sent two emails:

- 1) Screening email
- 2) Training Email

The emails will be from:

Safeguarding: Screening Application for Allen Adams



usher@epicenter.org

To ○ Allen Adams

The message will be similar to this depending on the position:



Dear Allen,

To meet the qualifications for the Safeguarding Position of Lay Minister/Teacher/Coach/Counselor, the first step is to complete the application.

The application will ask for:

- Personal information (name, birthdate, driver's license, phone number).
- Address history (all addresses for the last 7 years, including city, county, and state. You may enter an international address).
- References (names of four (4) references with their addresses, daytime phone number email address, length of time you have known the person and their relationship to you).
- Previous employment and/or voluntary service information (If applying for employment: provide employment history for the past 7 years with beginning and ending dates, name of firm with full address, immediate supervisor name and phone number, the position held, the reason for leaving).
- background check release form that will ask for your social security number.

Directions: (Please read all directions before proceeding.)

1. Click here [here](https://usher.epicenter.org/safeguarding/sgapp?ID=120358&SEQN=174048) to continue or paste the following URL into Edge, Firefox, Safari or IE11 browser: <https://usher.epicenter.org/safeguarding/sgapp?ID=120358&SEQN=174048>

2. You will be prompted for a username and password.

a. Your username is aadams@mailinator.com.

b. The first time you access the site, you will need to click on the "Forgot password" link, then check your email for a link to reset your password. Please check your Spam or Junk Mail folder if it was not in your inbox. If no email is found, contact USHERSupport@epicenter.org.

c. **DO NOT USE THE LINK IN THE PASSWORD EMAIL. After resetting your password COME BACK TO THIS EMAIL and use the "Click here" link above to access your application.**

d. You will be able to save your information and return to complete your application if needed.

If you need assistance, please contact your Safeguarding Records Administrator Martha Romero Brickley at mbrickley@epicenter.org. If you need further assistance, call 512-478-0580 and ask to speak with someone in the Safeguarding office.

Note: If you have recently completed an application for another position, you may ignore this email. Check with your Safeguarding Administrator if you are uncertain. Screening is current for five years.

Thank you,

The Safeguarding Office

Estimado Allen:

Para cumplir con los requisitos para el puesto de Salvaguardando de 718 { Ordinal: 174048, ID: 120358, SRAID: 1749, SRAName: Martha Romero Brickley, ApplicantName: Allen Adams, InterviewApprovalDate: 6/3/2025 12:00:00 AM, INT_Save: APPROVED, FirstName: Allen, Description: Lay Minister/Teacher/Coach/Counselor, SRA_Email: mbrickley@epicenter.org, App_Email: aadams@mailinator.com, URL_text: <https://usher.epicenter.org/safeguarding/sgapp?ID=120358&SEQN=174048>, URL: <A HREF="<https://usher.epicenter.org/safeguarding/sgapp?ID=120358&SEQN=174048>">here }, el primer paso es completar la solicitud.

La solicitud solicitará:

- Información personal (nombre, fecha de nacimiento, licencia de conducir, número de teléfono).
- Historial de direcciones (todas las direcciones de los últimos 7 años, incluida la ciudad, el condado y el estado. Puede ingresar una dirección internacional).

- Referencias (nombres de cuatro (4) referencias con sus direcciones, número de teléfono durante el día, dirección de correo electrónico, tiempo que conoce a la persona y su relación con usted).
- Información sobre empleos anteriores y/o servicio voluntario. (Si solicita empleo: proporcione el historial laboral de los últimos 7 años con fechas de inicio y finalización, nombre de la empresa con dirección completa, nombre y número de teléfono del supervisor inmediato, el puesto que ocupó, el motivo por el que dejó el trabajo).
- Formulario de autorización de verificación de antecedentes penales que le solicitará su número de seguro social.

Instrucciones:

1. Haga clic aquí [here](https://usher.epicenter.org/safeguarding/sgapp?ID=120358&SEQN=174048) para continuar, o pegue la siguiente URL en el navegador Edge, Safari o IE11:
<https://usher.epicenter.org/safeguarding/sgapp?ID=120358&SEQN=174048>
2. Se le solicitará un nombre de usuario y una contraseña.
 - a. Su nombre de usuario es aadams@mailinator.com.
 - b. La primera vez que acceda al sitio, deberá hacer clic en el enlace "Olvidé mi contraseña" y luego revisar su correo electrónico para obtener un enlace para restablecer su contraseña. Revise su carpeta de correo no deseado o basura si no recibe el correo electrónico. Si no está allí, comuníquese con USHERSupport@epicenter.org.
 - c. **NO USE EL ENLACE DEL CORREO ELECTRÓNICO DE CONTRASEÑA. Después de restablecer su contraseña, REGRESE A ESTE CORREO ELECTRÓNICO y use el enlace "Haga clic aquí" de arriba para acceder a su solicitud.**
 - d. Podrá guardar su información y volver a completar su solicitud si es necesario.

Si necesita ayuda, comuníquese con su Administrador de Salvaguardando de Registros Martha Romero Brickley al mbrickley@epicenter.org o con la Oficina de Salvaguardando al 512-478-0580.

Nota: Si recientemente completó una solicitud para otro puesto, puede ignorar este correo electrónico. Consulte con su Administrador de Salvaguardando si no está seguro. La evaluación está vigente por cinco años.

Gracias,

La Oficina de Salvaguardando

Safeguarding: Training for Allen Adams



usher@epicenter.org

To ○ Allen Adams

Cc ● Marty Brickley

★ The **Episcopal Diocese of Texas**

Dear Allen,

Please read this email thoroughly for the best training experience.

You are invited to begin Universal and Specialized Training. Your position of: Lay Minister/Teacher/Coach/Counselor requires the following Training Courses:

- Safe Church, Safe Communities - Specialty Training: Abuse & Neglect (ENG), -- CON30052ENUS -- (Praesidium)
- Safe Church, Safe Communities - Specialty Training: Bullying (ENG) (ES), -- CON30053ENUS -- (Praesidium)
- Safe Church, Safe Communities - Universal Training: Healthy Boundaries (ENG) (ES), -- CON30054ENUS -- (Praesidium)
- Safe Church, Safe Communities - Universal Training: Introduction & Theological Background (ENG) (ES), -- CON30050ENUS -- (Praesidium)
- Safeguarding Your Community: A Universal Review of Episcopal Diocese of Texas Safeguarding Policies (ENG) (ES), -- CON50272EN -- (Praesidium)
- Universal Engagement Training, -- SAL -- (Calendar Event)

If you have taken any of these courses within the last year, you do not need to repeat them. You will be credited for all positions that require them.

NOTE: If you are taking the Antiracism Training or Title IV, please disregard the rest of this email. The Safeguarding Office will register you for this training.

To access online courses through Praesidium Academy click on: <https://www.praesidiumacademy.com/learn>.

Login directions:

1. Your username is your email address.
2. To create a password in Praesidium Academy, please click 'Forgot your password'. If you do not receive a password email, use the Assistance button on the Praesidium site

and ask for assistance or call 877-777-0070.

3. You do not need a code to create your account.

4. You may be asked in an Onboarding Survey to choose a category. You may choose 'Other'.

If you want to use the Browse section to locate a training, you can select the following according to the course title:

Scroll down to Program/Role where you will see the titles below.

Safe Church, Safe Communities: Universal Training

Safe Church, Safe Communities: Specialty Training

When you click on the title you will be given a list of courses. Choose the required courses.

NOTE: You must remove the title from the filter after each search.

To find the Safeguarding Your Community courses you need enter the following title into the Browse field:

Safeguarding Your Community

Again, when you click on the title you will be given a list of courses. Choose the required courses.

Once your online trainings are complete, if you require a live Universal Engagement Training, you will receive an invitation email to register through the Training Calendar. These trainings are available in person or virtually.

Please ensure that all online courses are completed PRIOR to registering for an in person or virtual Universal Engagement Training.

You have 45 days from the date of this email to complete your online courses and the live Universal Engagement Training.

If you need further assistance, please contact your Safeguarding Records Administrator (SRA) Martha Romero Brickley at mbrickley@epicenter.org. Or you may also call 512-478-0580 and ask to speak with someone in the Safeguarding office.

Thank you,

The Safeguarding Office

stimado/a {#party.Informal}:

Por favor, lea este correo electrónico detenidamente para disfrutar de la mejor experiencia de capacitación.

Le invitamos a comenzar {#recipient.TrainingType}. Su puesto: {#recipient.Description} requiere los siguientes cursos de capacitación:

{foreach item in sgc}

- {#item.Title}, -- {#item.CourseCode} -- ({#item.Source})

{/foreach}

Si ha realizado alguno de estos cursos en el último año, no necesita repetirlos. Se le acreditarán para todos los puestos que los requieran.

NOTA: Si está realizando la capacitación contra el racismo o el Título IV, ignore el resto de este correo electrónico. La Oficina de Salvaguardando lo inscribirá en esta capacitación.

Para acceder a los cursos en línea a través de Praesidium Academy, haga clic en: <https://www.praesidiumacademy.com/learn>

Instrucciones de inicio de sesión:

1. Su nombre de usuario es su dirección de correo electrónico.
2. Para crear una contraseña en Praesidium Academy, haga clic en "¿Olvidó su contraseña?". Si no recibe un correo electrónico con la contraseña, utilice el botón de Asistencia en el sitio web de Praesidium y solicite ayuda o llame al 877-777-0070.
3. No necesita un código para crear su cuenta.
4. Es posible que se le pida en una encuesta de incorporación que elija una categoría. Puede elegir "Otro".

Si desea usar la sección "Explorar" para encontrar una capacitación, puede seleccionar lo siguiente según el título del curso:

Desplácese hasta Programa/Rol, donde verá los títulos a continuación.

Safe Church, Safe Communities: Universal Training

Safe Church, Safe Communities: Specialized Training

Al hacer clic en el título, aparecerá una lista de cursos. Elija los cursos que desee.

NOTA: Debe eliminar el título del filtro después de cada búsqueda. Para encontrar los cursos de Safeguarding your Community que necesita, ingrese el siguiente título en el campo "Explorar":

Safeguarding your Community

Al hacer clic en el título, verá una lista de cursos. Seleccione los que necesita.

Una vez completadas sus capacitaciones en línea, si necesita una Universal Engagement Training, recibirá un correo electrónico de invitación para registrarse a través del Calendario de Capacitaciones. Estas capacitaciones están disponibles en persona o virtualmente.

Asegúrese de completar todos los cursos en línea ANTES de registrarse en una Universal Engagement Training en persona o virtual.

Tiene 45 días a partir de la fecha de este correo electrónico para completar sus cursos en línea y la Universal Engagement Training.

Si necesita más ayuda, comuníquese con su Administrador de Registros de Salvaguardando (SRA) {#recipient.SRAName} al {#recipient.SRA_Email}. También puede llamar al 512-478-0580 y solicitar hablar con alguien de la oficina de Salvaguardando.

Gracias,

La Oficina de Salvaguardando

The applicant will follow the instructions to access the application, fill it out and submit. The applicant will also follow the instructions to access the online courses through Praesidium Academy.

IF there are any issues with accessing either the application or the courses, please contact the Safeguarding Office.

APPLICATION

The progress of the application can be followed on the WIP page under Screening:

Currently the table shows that the Interview has been approved.

And, it indicates that the application has not been started.

Screening	Required	Status	Approved
Interview	Yes	Approved	03/20/2025
Application	Yes	Not Started	
Background Check	Yes	Not Started	
Reference Checks	Yes	Not Started	

Once the application has been completed and submitted, it will show on the Screening table:

Screening	Required	Status	Approved
Interview	Yes	Approved	12/19/2024
Application	Yes	Approved	4/10/2025
Background Check	Yes	In progress	
Reference Checks	Yes	Not Started	

At this point the background check is automatically ordered, and you will see it as “In progress”.

Reviewing the Application:

Work from the Process Menu to approve the application.

Process Menu:

Interview

Application and Background Check Consent

Background Check

Reference Checks

Start by clicking on the Application and Background Check Consent button. If the position is a recertification, the menu will look like this:

Process Menu:

Application and Background Check Consent

Background Check

Personal Information and Questions:

This page automatically opens.

On the right you will see buttons for all application pages, a “Status” page button and a “Return to Main” button:

Personal Information

Address History

Background Consent

Status

Return to Main

Start the review on the Personal Information and Questions page. If the process is a recertification, the menu will look like this:

Process Menu:

Application and Background Check Consent

Background Check

If recertification, the applicant will not have answered the questions at the bottom.

Name	Dave Davis
First Name	Dave
Middle Name	
No Middle Name	Yes
Last Name	Davis
Date of Birth	8/15/1988 12:00:00 AM
Gender	M
Home Phone	
Work Phone	5126091892
Mobile Phone	
Email	dd@mailinator.com
Driver License Number	
Driver License State	
No Driver License	Yes
Volunteer or paid position applying for	Just Screening
Have there ever been any complaints made against you regarding your interactions with children, youth, or adults in your work or in a volunteer position? If yes, please explain.	
SD	
Have you ever been fired or asked to resign from a job or volunteer position because of misconduct? If yes, please explain.	
d	
Have you ever been convicted of or pleaded guilty or nolo contendere (no contest) to any crime, including driving violations? If yes, please explain.	
S	
Have you ever been accused of domestic violence or ever had a restraining order against you? If yes, please explain.	
sd	
Have you ever been accused of physically, sexually, or emotionally abusing a child or an adult? If yes, please explain.	
SD	
<input type="checkbox"/> SRA: I have reviewed the information on this page	
Submit	

Review the page to make sure that the page has been filled out.

Be sure that the birth date year looks correct.

If this page looks complete and there are no red flags indicated by any answers, check the box indicating you have reviewed the information and then select Submit at the bottom of the page:

☐ SRA: I have reviewed the information on this page

Submit

If any answers cause a red flag, always confer with the Head of your church, school or organization on how to proceed. You may contact the Safeguarding office if you need additional assistance.

You may use the notes box on the Status page to indicate any actions taken or reasons for approval or non-approval.

If an answer is missing or is incorrect on any page you can use the Send Back status on the Status page to send the application back to the applicant to provide or correct this information. Review the entire application prior to sending it back so that the applicant has all the information they need. A text box will be provided that will allow you to instruct the applicant what is missing or what needs correction. They will receive an email with these instructions and a link to the application.

If it is decided that this application will not be approved, it is the responsibility of the Head of... to relay this to the applicant, not the SRA's responsibility.

Address Page:

Address History

SRA, please scroll down to review the Applicant information. When done, please check the "SRA: I have reviewed the information on this page" checkbox to confirm your acknowledgement of this portion of the application.

Continue through the remainder of the Application to review and approve each section.

From	To	Address	City	State	Zip	Updated By
2000		510 Peyton Place	Austin	TX	78796	Dave Davis

☐ SRA: I have reviewed the information on this page

Submit

Check when there is more than one address that the "From" and "To" years are included.

The first address is the current address and will not have a "To" date.

Be sure the State is TX and not TE when it should be TX.

Check the box indicating you have reviewed the page and select submit.

References Page

References

SRA, please scroll down to review the Applicant information. When done, please check the "SRA: I have reviewed the information on this page" checkbox to confirm your acknowledgement of this portion of the application.

Continue through the remainder of the Application to review and approve each section using the navigation on the right side of the page.

FullName	Relationship	Length	Phone	Email
danielle tatro	co-worker	10 years	5129095053	dtatro@epicenter.org
Tracy Cramer	co-worker	10 years	5126091886	tcramer@epicenter.org
Katherine Muhlenbruch	co-worker	10 years	5126091892	kmuhlenbruch@epicenter.org
Martha Brickley	co-worker	10 years	5129095054	martybrickley@gmail.com

☐ SRA: I have reviewed the information on this page

Submit

Personal Information

Address History

- Check that four references have been provided.
- Make sure that there is no more than one relative listed.
- If any information is missing, please send the application back to the applicant.
- Check the box indicating you have reviewed the page and select submit.

FullName	Relationship	Length	Phone	Email
danielle tatro	co-worker	10 years	5129095053	dtatro@epicenter.org
Tracy Cramer	co-worker	10 years	5126091886	tcramer@epicenter.org
Katherine Muhlenbruch	co-worker	10 years	5126091892	kmuhlenbruch@epicenter.org
Martha Brickley	co-worker	10 years	5129095054	martybrickley@gmail.com

☐ SRA: I have reviewed the information on this page

Submit

Volunteer or Employment Page

Volunteer

Please scroll down to review the Applicant information. When done, please check the "SRA: I have reviewed the information on this page." checkbox to confirm your acknowledgement of this portion of the application.

Continue through the remainder of the Application to review and approve each section.

Organization	Dates	ContactPerson	ContactPhone	Duties
Episcopal Diocese of Texas	2000-2023	danielle tatro	5129095054	

☐ SRA: I have reviewed the information on this page

Submit

OR

Application and Background Check
Employment

SRA, please scroll down to review the Applicant information. When done, please check the "SRA: I have reviewed the information on this page" checkbox to confirm your acknowledgement of this portion of the application.

Continue through the remainder of the Application to review and approve each section.

From	To	Company	Address	City	State	Zip	SupervisorName	SupervisorPhone	Positio
11/2020		Test Company	345 West Test Street	Austin	TX	78796	Mark Allen	512-898-0780	Manage

☐ SRA: I have reviewed the information on this page

Submit

Personal Information

Address History

References

Employment

Background Check Consent Page

The top of the page looks like this and provides directions:

Application and Background Check

Background Check

SRA, please scroll down to review the Applicant information. When done, please check the "SRA: I have reviewed the information on this page" checkbox to confirm your acknowledgement of this portion of the application.

Continue through the remainder of the Application to review and approve each section.

Personal Information
Address History
References
Employment
Background Consent
Status
Return to Main

The rest of the page looks like this:

Review page to make sure all boxes are checked.

Name Wendy W. Weaver

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.

Yes

I authorize any person or organization, whether or not identified in this application, to provide any information concerning my previous or current employment or volunteer activities, my proper identification, 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. For consumer rights information please see the link below.

Yes

For consumer rights information please click [here](#).

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.

Yes

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.

Yes

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.

Yes

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 understand that the Diocese will utilize an outside firm or firms to assist it in checking such information and I specifically authorize such an investigation.

Yes

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.

Yes

I agree to a background check.

Yes

☐ SRA: I have reviewed the information on this page

Submit

Then check the box and submit.

Have you ever been accused of physically, sexually, or emotionally abusing a child or an adult? If yes, please explain.

No

☒ SRA: I have reviewed the information on this page

Submit

Status Page:

Next Select the Status button:

Personal Information

Address History

References

Employment

Background Consent

Status

Return to Main



If there is a need for more information or to correct information, use the Send Back status on the Status page:

Application Approval Date

* **Status**

(None) ▼

(None)
 Approved
 Keep Pending
 Not approved
 Send Back

Save

You can make a note in “Reason for Return” boxen click on Save.

Application Approval Date

* **Status**

Send Back ▼

Reason for Return

Please add an additional reference, you used one reference twice.

Internal Notes

Save

This will send an email to the applicant with your note added. Once they correct or add the needed information and submit, the application will return, and you can continue your review and approval process.

On the Status page, review this box to make sure all pages were approved. A “yes” will appear by each page, or a “no” if you have not approved a page as in this example:

Application and Background Check

SRA, please review each page before final approval. Send the application back to the applicant if changes need to be made.

You have indicated that the following pages have been reviewed:

- Personal Information: No
- Address History: Yes
- References: Yes
- Employment or Volunteer History: Yes
- Background Check: Yes

Go back and approve the page and then check again on the Status page:

Application and Background Check

SRA, please review each page before final approval. Send the application back to the applicant if changes need to be made.

You have indicated that the following pages have been reviewed:

- Personal Information: Yes
- Address History: Yes
- References: Yes
- Employment or Volunteer History: Yes
- Background Check: Yes

At the bottom of the page use the drop-down menu to select for Approved, Keep Pending, Not approved or Send Back. In this case select Approved and Save. You may make an internal note if needed.

Application Approval Date

* Status

(None) ▼

(None)

Approved

Keep Pending

Not approved

Send Back

Save

You will see a banner at the bottom indicating the approval has been saved:

Application Approval Date

* Status

Approved ▼

Internal Notes

Save

✓ Saved

Then select “Return to Main” and go to the Menu to check the Background Check and/or References.

BACKGROUND CHECK REVIEW AND APPROVAL

Check Screening to see the status of the Background Check:

It will say “In progress” while the background check has been ordered but not yet delivered.

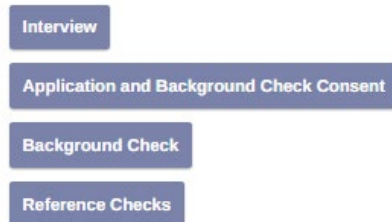
Screening	Required	Status	Approved
Interview	Yes	Approved	04/14/2025
Application	Yes	Approved	4/15/2025
Background Check	Yes	In progress	
Reference Checks	Yes	Not Started	

When a background check has been delivered for approval, it will appear as this:

Screening	Required	Status	Approved
Interview	Yes	Approved	02/26/2025
Application	Yes	Approved	4/12/2025
Background Check	Yes	Delivered for approval	
Reference Checks	Yes	Not Started	

Click on the Background Check button in the Process Menu:

Process Menu:



The check will have three sections:

Criminal File Search:

There will be more information under it in

Personal Information

Address History

References

Employment

Background Consent

Status

Return to Main

Now under Screening the Application will show as Approved and a date will post:

Screening	Required	Status	Approved
Interview	Yes	Approved	04/14/2025
Application	Yes	Approved	4/15/2025
Background Check	Yes	In progress	
Reference Checks	Yes	Not Started	

At this point the system automatically orders the background check.

Select “Background Check” from the Process Menu:

Process Menu:

Interview

Application and Background Check Consent

Background Check

Reference Checks

The background check is comprised of three checks:

National Criminal File Search:

[Record ordered](#)

FIRST_ADVANTAGE NATIONAL CRIMINAL FILE SEARCH

First Advantage National Criminal File Plus

04/12/2025

Address Covered

Court Name/Type

Name Searched

AUSTIN TRAVIS, TX

DATABASE SEARCH

Search Results

CLEAR

68

Felony Index Search Including Misdemeanors:

Record ordered	FELONY INDEX SEARCH INCLUDE MISDEMEANORS		
Type of Search	Felony Including Misdemeanor Or Other	Search Results	CLEAR
Date of Search	04/12/2025		
Search Period	03/29/2018 -		
Location	1001 GUADALUPE ST #301 AUSTIN TX TRAVIS COUNTY		
Address Covered	██████████ AUSTIN TRAVIS, TX		
Court Name/Type	TRAVIS DISTRICT COURT		
Name Searched	██████████		

Source Status History		
STATUS DATE	ACTION DATE	STATUS DESCRIPTION
04/12/2025	04/15/2025	Search in progress. Estimated completion by Action Date.

Remarks

And the Social Security Verification:

SOCIAL SECURITY VERIFICATION

Remarks: 04/12/25: SUBJECT NAME RETURNED MATCHED WITH A DEVELOPED NAME.04/12/25: SSN PROVIDED WAS CHECKED AGAINST THE DEATH MASTER INDEX AND NO MATCH WAS REPORTED.04/12/25: NO ALERTS RETURNED FROM SEARCH.

Once the background check has been reviewed, go back to the top of the page to provide approval. Make any comments if needed.

Background Check Review

* Status	<div>(None) ▾</div>
Background Comment	<div></div>
<div>Save</div>	

Click on the drop-down and select Approved and Save.

Background Check Review

* Status

Background Comment

Approved

Not approved

SAVE. I want to be able to return and edit information before finalizing.

For more help on reviewing background checks go to the link:

[SRA and Coordinator: Information and Resources - EDOT](#)

Under Screening Process and Forms see the

[Background Checks – Help Sheet](#)

Once the background check is approved a banner will appear at the bottom to let you know it has been saved, and you may close the tab:

Background Check Review

* Status

Background Comment

✓ Saved. You may log out now or close the tab.

()

Screening will now show the background check as approved with a date:

Commented [SS1]: MARTY WILL ADD NEW INT'L SECTION

Screening	Required	Status	Approved
Interview	Yes	Approved	04/14/2025
Application	Yes	Approved	4/15/2025
Background Check	Yes	Approved	4/15/2025
Reference Checks	Yes	Not Started	

REVIEW AND APPROVE REFERENCES

Screening will show References as Not Started and with no date noted:

Screening	Required	Status	Approved
Interview	Yes	Approved	04/14/2025
Application	Yes	Approved	4/15/2025
Background Check	Yes	Approved	4/15/2025
Reference Checks	Yes	Not Started	

Select Reference Checks from the Process Menu:

Process Menu:

- Interview
- Application and Background Check Consent
- Background Check
- Reference Checks

The page will open to a table. Progress can be followed on the table. Only two out of the four references are required for approval of references overall:

The table provides each reference's name, relationship, length of relationship, phone number and email address as well as indicating the following status:

- a. Never Contacted
- b. Completed
- c. Email Reference
- d. Submitted

Application and Background Check

Reference List

Name Wendy W. Weaver
Position Lay Minister/Teacher/Coach/Counselor
Location EDOT Test Church
SRA Martha Romero Brickley

Name	Relationship	Length	Phone	Email	Never Contacted	Completed	Email Reference	Subn
Danielle Tatro	co-worker	10 years	512-609- 1882	dtatro@epicenter.org				
Danielle Tatro	co-worker	10 years	512-609- 1882	dtatro@epicenter.org				
Tracy Cramer	Friend	friend	5126091886	tcramer@epicenter.org				
Katherine Muhlenbruch	co-worker	5 years	5126091892	kmuhlenbruch@epicenter.org				
Sarah Gaventa	friend	2 years	512-609- 1876	sgaventa@epicenter.org				

SRA: At least **two** approved references are necessary to meet requirements.

No records found

Choose delegate

Status

(None)

Save

3

Each name is a link. There are three options for completing references:

1. SRA completes the reference.
2. SRA delegates the references to someone else to complete and monitors the return for review and approval.
3. SRA emails the reference and monitors the return for review and approval.

SRA completes the reference:

The reference names and phone number are provided on the original reference table.

Name	Relationship	Length	Phone	Email	Never Contacted	Completed	Email Reference	Subn
Danielle Tatrp	co-worker	10 years	512-609- 1882	dtatro@epicenter.org				

Click on a name, it is a link and will open to the reference questions.

References

FullName Wendy W. Weaver

Reference Full Name Danielle Tatrp

☐ Send Email to Reference?

How do you know the applicant? What shared experiences do you have?

What observations can you share about how this person relates to other adults? To children and youth?

What, if any, complaints have you had about this person's interaction with other adults? With children and youth?

The (volunteer/employment) position for which this person has applied requires that the person be able to work closely with either children or adults who are vulnerable and who may lack agency or good judgment. Can you think of any reason why the applicant should not be allowed to do this work (like a hot temper or inappropriate behavior)?

Other relevant comments or information received from call:

Notes and record of attempts

☐ Never Contacted

☐ Completed

Submit

The best practice is to obtain answers through a phone call and filling in the answers on the form. At the bottom of the form, you can indicate if this reference was never contacted, or if the reference is complete and then select Submit. Only two out of four references must be completed.

References

FullName

Wendy W. Weaver

Reference Full Name

Danielle Tatrp

☐ Send Email to Reference?

* How do you know the applicant? What shared experiences do you have?

She is my co-worker. We have worked together for five years.

* What observations can you share about how this person relates to other adults? To children and youth?

She relates to adults with patience and kindness. She is good with children, treating them with respect.

* What, if any, complaints have you had about this person's interaction with other adults? With children and youth?

None.

* The (volunteer/employment) position for which this person has applied requires that the person be able to work closely with either children or adults who are vulnerable and who may lack agency or good judgment. Can you think of any reason why the applicant should not be allowed to do this work (like a hot temper or inappropriate behavior)?

She has taught Sunday School and volunteered with Meals on Wheels.

Other relevant comments or information received from call:

She is a good listener.

Notes and record of attempts

☐ Never Contacted

☒ Completed

Submit

A completed reference will show up on the table with an “x” noted under Competed. Also, if the reference was marked as “Never contacted an “x” will be noted as well.

Name	Relationship	Length	Phone	Email	Never Contacted	Completed	Email Reference	Subr
Danielle Tatrp	co-worker	10 years	512-609-1882	dtatro@epicenter.org				
Danielle Tatrp	co-worker	10 years	512-609-1882	dtatro@epicenter.org				
Tracy Cramer	Friend	friend	5126091886	tcramer@epicenter.org		x		
Katherine Muhlenbruch	co-worker	5 years	5126091892	kmuhlenbruch@epicenter.org	x			
Sarah Gaventa	friend	2 years	512-609-1876	sgaventa@epicenter.org				

The SRA can review the answers and click “Complete”. If the references were delegated, the answers will show up on the table with an “x” under submitted. You may then review and complete any delegated references.

You will only need to have two approved references.

Email the Reference:

If the person cannot be reached, emailing is an acceptable alternative. Check the box indicating that the reference should be emailed. An email will go out to the reference with a link to access the questions and to submit them.

FullName Wendy W. Weaver

Reference Full Name Danielle Tatrp

☒ Send Email to Reference?

Once two references have been completed not Approved as the status and Save:

SRA: At least **two** approved references are necessary to meet requirements.

Number of approved references = 2

Choose delegate

Undelegate

* Status

Approved



Save

Delegate the Reference:

To delegate, follow the same directions as delegation for an interview. It will deliver all four references to the person delegated. Select “Choose delegate”:

Enter a name and click on Find:

Delegate Lookup

First Name Equals	<input type="text" value="Martha"/>
Last Name Equals	<input type="text" value="Brickley"/>
<input type="button" value="Find"/>	

Please enter your search criteria to view results

The name will appear below as a link. Click the link:

<input type="button" value="Find"/>	
<hr/>	
Martha Romero Brickley (mbrickley@epicenter.org)	

This page will appear, click Save delegate selection:

References

<input type="button" value="Lookup delegate"/>
Undelegate <input type="checkbox"/>
References
<input type="button" value="Save delegate selection"/>

Use the 'save delegate selection' button above to save the delegate selected on the previous page.

To undelegate, enable the 'undelegate references' checkbox, and then press the 'save delegate selection' button.

You will then be returned to the main reference page with the delegation noted:

Delegated to
Martha Romero Brickley

SRA: At least **two** approved references are necessary to meet requirements.

No records found

The person delegated to will receive an email informing them of the applicant and the references with their contact information and a form is provided to fill in the answers. Once the answers have been filled in and submitted this will show up on the main Reference page:

Undelegate:

You may undelegate as well by clicking on the “Undelegate” button.



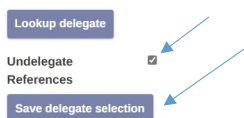
Choose delegate

Undelegate

* Status (None) v

Save

This option will show up, check the box and “Save delegate selection.”



Lookup delegate

Undelegate
References

☒

Save delegate selection

This will remove the delegation.

UNIVERSAL ENGAGEMENT TRAINING REGISTRATION

Most positions require the live Universal Engagement Training. This training can be taken either virtually or in person. Only a diocesan trained trainer may provide this training. The applicant will receive an invitation email to register for this training once all of their online courses are complete. Example:

To: shelby.bursk@my.ssw.edu

CC: {#recipient.SRA_Email}

From: usher@epicenter.org

Subject: Safeguarding: Invitation for Live Training for Shelby Morgan Bursk



Dear Shelby,

You have completed the required online courses for your Safeguarding position Lay Head Of/Supervisor/SRA/Coordinator/Trainer. Your position also requires a live engagement training.

If you have recently taken a live training for another position, you do not need to repeat this training. This is a Universal Training and is considered current for five years.

Live trainings are slowly becoming available. If you do not see a training provided by a trainer at your location, you may sign up for a training that is not restricted, meaning it is open to all. You can find this by looking at the "Restricted" column on the calendar. It will say "No" if it is not restricted. Keep these directions and check back in.

If you are a **lay person**, you may choose either:

- Universal Engagement In Person
- OR
- Universal Engagement Virtual

If you are a **clergy person**, you may choose:

- Universal Engagement Clergy Only

If you are clergy and required to take Antiracism training or Title IV, you may choose:

- Antiracism Training Lighting the Path in EDOT

- OR
- Title IV

Please review the Training Calendar to register for an upcoming training session.

To register:

1. Login to usher.epicenter.org/safeguarding

NOTE: this login is NOT the same as your login to Praesidium online courses. Your username is your email address on file with the Episcopal Diocese of Texas: (enter email address). Select the "Forgot password" link to recover your password if you are unable to sign in call 512-478-0580 and ask to speak to someone in the Safeguarding office.

2. Choose a course from the Event List and click on the Event Code to register or use the Training Calendar.

3. Click 'Register myself' followed by 'Proceed to Checkout'.
4. Confirm the Training session you have selected, then click 'Submit'.
5. You will receive an onscreen confirmation as well as an email version confirming your registration.
6. You will receive a reminder email 7 days out and then again, the day before the training.
7. If the training is virtual, you will receive the Zoom information to access the training a day or two before the training.

Check back on your Profile>Safeguarding tab to review the Training you are registered for. Additional details about the course, including changes in date or time, will be identified on the Training detail page.

If you need assistance, please contact your Safeguarding Records Administrator Martha Romero Brickley at mbrickley@epicenter.org. If you need further assistance, please call 512-478-0580 and ask to speak with someone in the Safeguarding office.

Thank you,

The Safeguarding Office

Trainings can be found on the Training Calendar. This calendar is only available to SRAs, Trainers, and applicants once they have completed their online requirements. You can find the Training Calendar as one of the five tabs on the main SRS page.

Trainings are either noted as restricted or not. If the applicant cannot find an open training, they can contact the trainer of a closed training to ask permission to attend. Trainer email addresses are provided on the calendar.

The Safeguarding office provides some open trainings each month and we encourage trainers to offer open trainings as they are able.

The calendar page provides directions :

Event List/Training Calendar

Directions:

1. From the List, register for a Training by clicking on the **“RegistrationEvent Code”**.
2. Select **“Register Myself”** and complete the checkout.
(If you are registering from the Calendar, click on the event and then select **“Register Myself”**.)
3. You will receive a confirmation email indicating your registration has been received.
4. If the training is **Restricted**, you can email the Trainer and ask for permission to attend.
5. If you need to reschedule and/or cancel:
 - a. Simply register for another training.
 - b. Contact ushersupport@epicenter.org (provide your name, the Event name and date) and request that your existing registration be cancelled)

If you need assistance, please contact the Safeguarding Office at 512-478-0580.

It allow the applicant to search by trainer, date, title, etc. for trainings:

Event List

Trainer name contains

Title Contains

Begin Date range and

Status Equals

Active

Location

City Contains

Event Code Equals

Find

The calendar itself appears as a list:

Begin Date Time	Registration Event Code	Training Name & Date: Sign-out sheets	Location	City	Restricted	Trainer Name	Email	Attendees	Max Registrants
9/14/2025 12:15 PM	SAL_000302	Universal Engagement In Person (09/14/2025)	Good Shepherd	Austin	No	Mrs. Lise Harding	harding.lise@gmail.com	1	30
9/7/2025 12:30 PM	SAL_000311	Universal Engagement In Person (09/07/2025)	St. Andrew's	Bryan	Yes	Dr. Linda Sutterby Patterson	music@standrewsbcs.org	0	15
8/21/2025 1:00 PM	SAC_000024	Universal Engagement Clergy Only (08/21/2025)	Zoom Training		Yes	The Rev. Canon Sarah K. Gaventa	sgaventa@epicenter.org	17	25
8/19/2025 12:00 PM	SAL_000297	Universal Engagement In Person (08/19/2025)	St. Andrew's Academy	Pearland	Yes	Mrs. Lauren Bree Diller	bree.diller@gmail.com	1	10

In the section below “Requesting Trainings/My Trainings/Training Calendar” you will find additional directions on how to register yourself or others for a training. This should aid you in helping applicants who may need assistance registering.

Requesting Trainings/My Trainings/ Training Calendar

These directions are for both Trainers and SRAs.

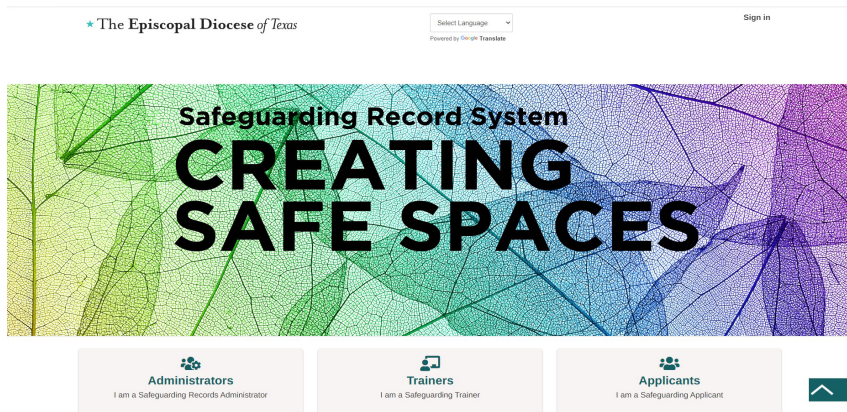
Contents:

1. [Access the Safeguarding Record System](#)
2. [Request a Training](#)
3. [Event List/Training Calendar](#)
4. [Registering for an Event: Yourself or Someone Else](#)
5. [My Trainings](#)
6. [Increasing Capacity and Cancelling a Registration](#)
7. [Export/Print Sign-out Sheet](#)
8. [Upload Sign-out Sheet](#)

1. Accessing the Safeguarding Record System

First you will access the Safeguarding site with the following URL:

<https://usher.epicenter.org/safeguarding>



On the top right-hand corner, click on the link to Sign In.

Sign in

It will open to the Sign In page where you will use:

Username: your email address

Password: click on Forgot Password and follow directions if you do not already have a password.

★ The Episcopal Diocese of Texas

Select Language: ▼

Powered by Google Translate

Sign In

Username
mbrickley@epicenter.org

Password

Sign In

[Forgot username?](#) | [Forgot password?](#)

If you forgot your password, please use "forgot Password?" link below the "Sign In" button.

If you still have issues, please contact ushersupport@epicenter.org
Provide your name and email

If you have difficulty, go back and use "Forgot username". The system may need to set your account credentials. Then try again. If you still have problems, contact ushersupport@epicenter.org

2. Request Training

As a Trainer you will have access to three tabs:

Request Training	My Trainings	Training Calendar
-------------------------	---------------------	--------------------------

You can begin by clicking on the Trainer Link at the bottom of the page to request a training, or click on the request Training Tab:

Trainers

I am a Safeguarding Trainer

Either way will take you to the Request Training page.

You will be provided with the following information:

Request Training

To request a new training session, please complete the form below to submit your session to the Safeguarding Office for review and approval.

Once your training session is approved, you will see your training made available for registration on the [Training Calendar](#).

Note: this form will reload to allow an additional training session to be requested or you return to your approved trainings by clicking the button below.

[Return to Training Sessions List](#)

The form will follow. If you are the trainer, the form will automatically fill in your information and the box indicating you are the trainer is checked:

Request New Training Form

Name

Martha Romero Brickley

I am the trainer (if not, ☐
 uncheck and select
 trainer from list)

mbrickley@epicenter.org

If you are not the trainer, unclick the box that is checked:

Then, using the drop-down menu in the Trainer field, select a trainer.

Make sure the trainer's email appears in the email field.

Name

Martha Romero Brickley

I am the trainer (if not, ☐ unchecked and select trainer from list)

* Trainer

(None) ▼

Required Field

Email

mbrickley@epicenter.org

Event Name

(None)

Location Name

Street Address

City

Zip Code

(None)

ABBOTT, JAMES

ABIO, SHEILA

ACOSTA, KELLI

ACOSTA, LILLIAN

ADINARO, JEANINE

AGANY, TABITHA

AKARD, PAIGE

ALLDAY, MARTIN

ALLEN, MICHELLE

ALVARENGA, DIEGO

ALVAREZ HANKS, PAIGE

AMAYA, LILIA

ANDREW, DIANE

ANGELE, KINSEY

ARNOLD, KAREN

ARROYO, MARGARITA

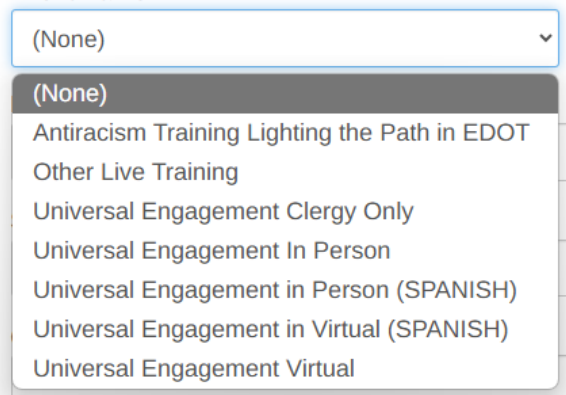
ASHBY, GARMON

ATKINS ROMERO, HANNAH

BAHENA ROJAS, JOSEFINA

Then choose the Event Name using the drop-down menu to choose.

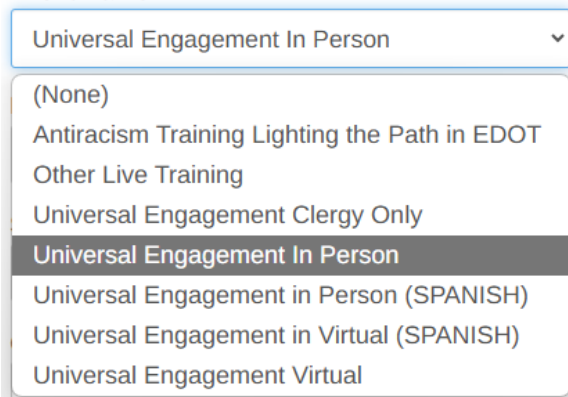
85

Event Name

A screenshot of a web form with a dropdown menu labeled "Event Name". The dropdown is open, showing a list of options. The first option is "(None)". Below it are several training options: "Antiracism Training Lighting the Path in EDOT", "Other Live Training", "Universal Engagement Clergy Only", "Universal Engagement In Person", "Universal Engagement in Person (SPANISH)", "Universal Engagement in Virtual (SPANISH)", and "Universal Engagement Virtual". The "Universal Engagement In Person" option is highlighted with a dark background.

Event Name
(None)
Antiracism Training Lighting the Path in EDOT
Other Live Training
Universal Engagement Clergy Only
Universal Engagement In Person
Universal Engagement in Person (SPANISH)
Universal Engagement in Virtual (SPANISH)
Universal Engagement Virtual

You will choose Universal Engagement Live, which is a live “in-person training”. Or you can choose Universal Engagement Virtual for a live “virtual training”. You may also choose those in Spanish if the training will be provided in Spanish.

Event Name

A screenshot of a web form with a dropdown menu labeled "Event Name". The dropdown is open, showing a list of options. The first option is "(None)". Below it are several training options: "Antiracism Training Lighting the Path in EDOT", "Other Live Training", "Universal Engagement Clergy Only", "Universal Engagement In Person", "Universal Engagement in Person (SPANISH)", "Universal Engagement in Virtual (SPANISH)", and "Universal Engagement Virtual". The "Universal Engagement In Person" option is highlighted with a dark background.

Event Name
(None)
Antiracism Training Lighting the Path in EDOT
Other Live Training
Universal Engagement Clergy Only
Universal Engagement In Person
Universal Engagement in Person (SPANISH)
Universal Engagement in Virtual (SPANISH)
Universal Engagement Virtual

If you choose Virtual, it will give you a field to enter the Zoom link which you may or may not wish to use at this time.

Event Name

Universal Engagement Virtual

Virtual Meeting URL

If you choose Live, it will ask you for the location, name and address:

Location Name

Test Locationd

Street Address

510 Rathervue Dr.

City

Austin

Zip Code

78705

Then you will have a chance to note if it is a restricted training (yes/no) and then note any restrictions:

* Is Training Restricted

(None) ▾

Restrictions Notes

(None)

No

Yes

Next you have a Notes field which allows you to add further information and links.

Notes

Meet in library.

https://s3.amazonaws.com/account-

media/5326/uploaded/s/0e5750112_1696350728_sg

.../.../...

Next you can add the attendee limit and select the date and time: (call the Safeguarding office if you need to change the limit)

Attendee Limit

15

Start Date and Time

1/30/2024 1:00 PM

End Date and Time

1/30/2024 4:15 PM

The clock allows you to choose times, and you can enter any time you want manually.

Then you can add an additional trainer if needed:

To add an Additional Trainer, click in the 'Additional Trainer' field to lookup an existing trainer. The list is alphabetical by first name and you may begin typing to sort the list rather than scrolling. Add the Additional Trainer's email address and/or phone number in the 'Additional Trainer Contact' field.

Additional Trainer

(None)

Additional Trainer Contact (Email, Phone)

Then click "Submit":

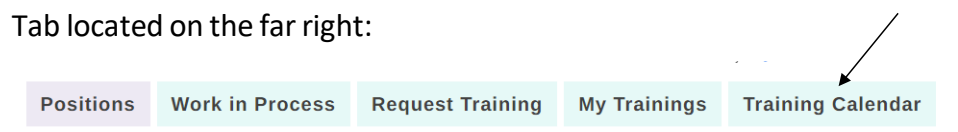
Submit Cancel

The training must be reviewed and approved by the Safeguarding Office. Once approved the training will appear in the Training Calendar.

3. Event List/Training Calendar

You will find the Training Calendar by clicking on the Training Calendar

Tab located on the far right:



The following directions appear on the page:

Event List/Training Calendar Directions:

1. From the List, register for a Training by clicking on the **"Event Code"**.
2. Select **"Register Myself"** and complete the checkout.
(If you are registering from the Calendar, click on the event and then select **"Register Myself"**.)
3. You will receive a confirmation email indicating your registration has been received.
4. If the training is **Restricted**, you can email the Trainer and ask for permission to attend.
5. If you need to reschedule and/or cancel:
 - a. Simply register for another training.
 - b. Contact ushersupport@epicenter.org (provide your name, the Event name and date) and request that your existing registration be cancelled)

If you need assistance, please contact the Safeguarding Office at 512- 478-0580.

You will first see an Event List search field to find a training. You can search for trainings:

Event List

Trainer name contains

Title Contains

Begin Date range and

Status Equals

Location

[Find](#)

If you enter the Trainer name for instance, it will show their upcoming trainings:

Trainer name contains

Title Contains

Begin Date range and

Status Equals

Location

[Find](#)

[Export](#)

Begin Date	Event Code	Training Name & Date: Sign-out sheets	Location	Restricted	TrainerFullName	Attendees	Max Registrants	Status
5/9/2024	SAV_000009	Universal Engagement Virtual (05/09/2024)		No	Katherine Muhlenbruch	10	16	Active

You can also choose by title, date range, status, or location. Below you will find the actual List of Trainings to choose from.

You will use the Event Code to register. Check the Restricted column to see if a training is restricted "Yes" or open for all "No".

Begin Date Time	Event Code	Training Name & Date: Sign-out sheets	Location	City	Restricted	Trainer Name	Email	Attendees	Max Registrants
8/15/2025 2:00 PM	SAL_000288	Universal Engagement In Person (08/15/2025)	Trinity Episcopal School	Austin	Yes	Joan Patricia Frost	jfrost@austintrinity.org	0	60
8/9/2025 9:00 AM	SAL_000247	Universal Engagement In Person (08/09/2025)	Christ Church Cathedral	Houston	Yes	Indira Yolanda Olmos	lolmos@christchurchcathedral.org	0	20
7/7/2025 3:00 PM	SAL_000277	Universal Engagement In Person (07/07/2025)	St Thomas' Episcopal School	Houston	Yes	Ms. Anne Sexton	sexton.anne@stes.org	0	10

Following the list the calendar will look something like this:

Feb, 2024							DAY	WEEK	MONTHLY	TIMELINE
Sun	Mon	Tue	Wed	Thu	Fri	Sat				
28 Bishop Doyle Visitation - Resurrexi... Ordination of the Rev. Gavin Eugen...	29	30	31	1 Feb	2 Ordination of the Rev. Sarah Faehn...	3 Ordination of the Rev. Eric Joseph ...				
4 Bishop Doyle Visitation - Holy Spirit ...	5	6	7	8 Bishop Doyle Visitation - Baylor Un...	9	10				
11 Bishop Doyle Visitation - All Saints. ...	12	13	14	15	16	17 Ordination of the Rev. Rev. Allen M...				
18 Bishop Doyle Visitation - Holy Famil...	19	20	21 Bishop Doyle Visitation - Trinity, For...	22	23	24 Ordination of the Rev. Maria Victori... Ordination of the Rev. Amy McCaus...				
25 Bishop Doyle Visitation - St. Mary's...	26	27	28	29 Universal Engagement Clergy Only ... Universal Engagement Live (02/29/...	1 Mar	2				

The calendar is shared with other departments, which makes finding a particular training course more challenging. Current training courses are in green.

On the top right side of the calendar there are options for viewing, but going back to the list is the best way to register.

DAY	WEEK	MONTHLY	TIMELINE
-----	------	---------	----------

4. Registering for an event: Yourself or someone else

Once you select a training, click on the Event Code to register yourself or someone else:

Begin Date Time	Event Code	Training Name & Date: Sign-out sheets	Location	City	Restricted	Trainer Name	Email	Attendees	Max Registrants
2/11/2026 1:30 PM	SB_0000029	Title IV Training SSW Students (02/11/2026)	Seminary of the Southwest Room		Yes	The Rev. Canon Sarah K. Gaventa	sgaventa@epicenter.org	0	25
10/23/2025 1:00 PM	SAC_000026	Universal Engagement Clergy Only (10/23/2025)	Zoom Training		Yes	The Rev. Canon Sarah K. Gaventa	sgaventa@epicenter.org	0	25
9/26/2025 9:00 AM	SAC_000025	Universal Engagement Clergy Only (09/26/2025)	Zoom Training		Yes	The Rev. Canon Sarah K. Gaventa	sgaventa@epicenter.org	0	25

Tip: Check the “Restricted” column to see if the training is ‘restricted’ or ‘open to all’. If it is open to all, it will say “NO”.

Begin Date Time	Event Code	Training Name & Date: Sign-out sheets	Location	City	Restricted	Trainer Name	Email	Attendees	Max Registrants
6/8/2025 12:00 PM	SAL_000257	Universal Engagement In Person (06/08/2025)	St Andrew's Episcopal Church	Pearland	No	Ms. Judy Beth Heald	judy.heald@att.net	7	20

When you click on the Code the page will open to:

Showcase
Dashboard
Registrants
Questions

Universal Engagement Live (02/29/2024)

Class is scheduled to meet in the Theater.
Restrictions: CLOSED CLASS: For employees of STE only. Thank you!

Price0.00
When2/29/2024 4:00 PM - 7:00 PM
Central Standard Time
Where4900 Jackwood St
Houston 77096
Spots available25

Register Myself
Register Someone Else

[Register multiple contacts](#)
Last day to register is 2/29/2024

Program

+ Add new program item

No records to display.

Notice that it shows some notes and restrictions if there are any. It shows time, place, and the spots that are available. It allows you to register yourself or Someone Else.

If you choose to Register Someone Else, it will open to this:

Register Someone Else

Choose a contact to register

☒ Select an existing contact

☐ Add a new contact

Type a name in, a drop down will open, select the person and then click Save and Close.

Register Someone Else

Choose a contact to register

Select an existing contact

Ms. Alicia Alcantara

Add a new contact

17

Name

Ms. Alicia Alcantara

Informal name

Alicia

Title

Organization

Episcopal Diocese of Te

Home Physical

Country

Address

30 Wildwood Dr. Apt. 19

Home Physical

Selected Address

Ms. Alicia Alcantara

30 Wildwood Dr. Apt. 191

Georgetown, TX 78633-5333

Save & Close

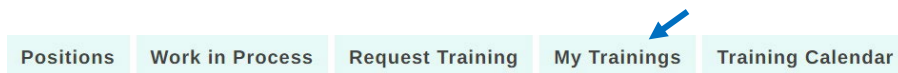
Cancel

Registrant	Organization	Title	Date registered	Guest of	Order Number	View registration
Abednego Abuto	All Saints', Fort Worth		2/2/2024		76.00	View registration
Linda Dorman	Episcopal Diocese of Texas		2/6/2024		79.00	View registration
Jonathan Maresca	Episcopal Diocese of Texas		2/2/2024		74.00	View registration
Mr. Dan Orfield	Episcopal Diocese of Texas		2/2/2024		75.00	View registration

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5. My Trainings

You will find My Trainings on the tabs, second tab from the left.



Click on the tab and it will open to this:

Safeguarding Trainings

Below is a list of Trainings that have been approved by the Safeguarding Office specific to your requested trainings.

To access a roster of registered attendees and to print a Sign-Out Sheet for attendee signature, select the Training name from the list below.

When your training is complete, return to this page to "Upload Sign-Out Sheet".

My Trainings

Training Name & Date: Sign-out sheets	Training Name & Date: Registrant Lists
Universal Engagement Live (01/03/2024)	Universal Engagement Live (01/03/2024)
Universal Engagement Virtual (01/06/2024)	Universal Engagement Virtual (01/06/2024)
Universal Engagement Virtual (02/12/2024)	Universal Engagement Virtual (02/12/2024)
Train the Trainer (02/13/2024)	Train the Trainer (02/13/2024)

Click on a training link under Training Name & Date: Registrant Lists (on the right)

Training Name & Date: Registrant Lists

It will open to a list like this:

A	B	C	D	
1	Event Name	Registrant	Organization	Date Registered Email
2	Universal Engagement Live (01/03/2024)	The Rev. Arthur Ashley Callaham	Episcopal High School, Bellaire	1/3/2024 aacallah
3	Universal Engagement Live (01/03/2024)	Stephanie Carrasco	Episcopal High School, Bellaire	1/3/2024 scarrasc
4	Universal Engagement Live (01/03/2024)	Mrs. Karen Ann Foster	Episcopal High School, Bellaire	1/3/2024 kfoster@
5	Universal Engagement Live (01/03/2024)	Kary Don Kemble	Episcopal High School, Bellaire	1/3/2024 kkemble
6	Universal Engagement Live (01/03/2024)	Ms. Kathryn Elaine Shaffer-Ray	Episcopal High School, Bellaire	1/3/2024 kshaffer
7	Universal Engagement Live (01/03/2024)	Emily Morgan White	Episcopal High School, Bellaire	1/3/2024 ewhite@

Export -

Event Name	Registrant	Organization	Date Registered	Email
Universal Engagement Live (01/03/2024)	The Rev. Arthur Ashley Callaham	Episcopal High School, Bellaire	1/3/2024	aacallah@gmail.com
Universal Engagement Live (01/03/2024)	Stephanie Carrasco	Episcopal High School, Bellaire	1/3/2024	scarrasco@ehshouston.org
Universal Engagement Live (01/03/2024)	Mrs. Karen Ann Foster	Episcopal High School, Bellaire	1/3/2024	kfoster@ehshouston.org
Universal Engagement Live (01/03/2024)	Kary Don Kemble	Episcopal High School, Bellaire	1/3/2024	kkemble@ehshouston.org
Universal Engagement Live (01/03/2024)	Ms. Kathryn Elaine Shaffer-Ray	Episcopal High School, Bellaire	1/3/2024	kshaffer@ehshouston.org
Universal Engagement Live (01/03/2024)	Emily Morgan White	Episcopal High School, Bellaire	1/3/2024	ewhite@ehshouston.org


6. Increasing Capacity and Cancelling registrations

If you need to **increase the capacity** for your training, please contact the Safeguarding Office.


If you need to **cancel a registration**, go to the Training Calendar:

Go to the Event List, choose the training and click on the Event Code. Click on the person’s icon picture to highlight them and then click on “Cancel registration for (name of person)”. Then follow the rest of the instructions to check out


Registrant




The Rev. Robert
Martial Odom




CHRISTOPHER
LUKE
LONGACRE




JOHN BATES




The Rev. William
T. Matthews




The Rev. Dr. Jill
Anne Walters-
Pace




Rebecca Jo
Mattix




Lauren Carroll




Mrs. Ramona
Ilene Sikes




Mrs. KariAnn Ann
Lessner



Indira Yolanda
Olmos



Leah Camahan





Mr. Michael Valka

Lauren Carroll

All Saints' Episcopal School, Fort Worth

Registration status for Lauren Carroll: Registered on 5/14/2024

 [Edit registrant information for Lauren Carroll](#)

 [Cancel registration for Lauren Carroll](#)

If you are unable to cancel a registration, please contact the Safeguarding office at 512-478-0580.

7.Export/Print an Upload Sign-out Sheets

Click on Training Name & Date: Sign-out sheets:

Training Name & Date: Sign-out sheets

You will see this information:

Training Sign-Out Sheet

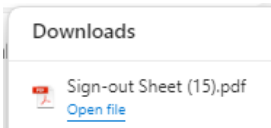
The Training Sign-Out Sheet and acknowledgement form will display below. Click the "Export" button from the top right corner of the sheet to export as a PDF to download and print for attendee signature.

Note: The Sign-Out Sheet will not display if there are no registered attendees for your training. If no one has registered, but you will be conducting the session, please [click here](#) to print a blank Sign-Out Sheet for attendee signature to upload after the training.

There is a link "click here" for a Blank Sign-out sheet if needed in an emergency.

session, please [click here](#) to print a blank

It will give you a downloadable file:



And it will look like this:

Training Sign-Out Sheet

The Training Sign-Out Sheet and acknowledgement form will display below. Click the "Export" button from the top right corner of the sheet to export as a PDF to download and print for attendee signature.

Note: The Sign-Out Sheet will not display if there are no registered attendees for your training. If no one has registered, but you will be conducting the session, please [click here](#) to print a blank Sign-Out Sheet for attendee signature to upload after the training.

Page 1 of 2

Export Find Text

★ The Episcopal Diocese of Texas

Universal Engagement Live (01/03/2024) Sign-out Sheet

Date of Training: January 3, 2024 12:00 PM
Location of Training (Church/School): 4520 Eliseonnet, City: Bellaire
Trainer: Katherine Muhlenbruch
I certify that these people attended the entire 3 hours of training

Trainer Signature

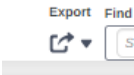
TRAINER: Review the following acknowledgement with your class:
Your signature indicates that you have attended Universal Engagement Live (01/03/2024) and that you agree to the following:
Acknowledgment

I have received copies of
Safeguarding God's Children: Policies for the Protection of Children and Youth and Safeguarding God's People: Policies for Safe Ministry with Adults, and I understand that they are the policies of the Episcopal Diocese of Texas.

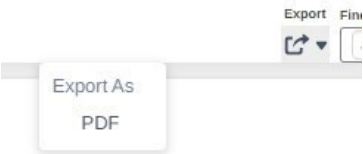
Name (printed)	Signature	Church/School
The Rev. Arthur Ashley Callahan		Episcopal Diocese of Texas
Stephanie Carrasco		Episcopal High School, Bellaire
Mrs. Karen Ann Foster		Episcopal High School, Bellaire
Kary Don Kiemle		Episcopal High School, Bellaire
Ms. Kathryn Elaine Shaffer-Ray		Episcopal High School, Bellaire
Emily Morgan White		Episcopal High School, Bellaire

2/7/2024 Page 1

At the top right is an Export button



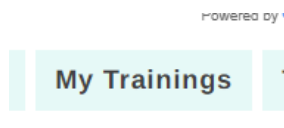
and if you click it, you will get this option:



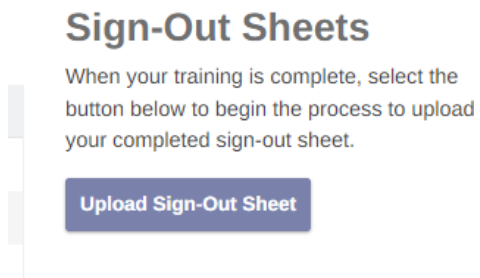
Click PDF and you will get a copy of the Sign-out Sheet to print.

8.UPLOADING THE SIGN OUT SHEET

Be sure the Trainer's signature is on the Sign-out sheet and then scan it and save it to be ready for upload. Go to My Trainings



On the right side of the page, you will see:



Click on Upload Sign-out Sheet. You will have directions on that page to complete the upload.