

Define Safe Environment Templates

You can define Safe Environment templates that include certain background check items or legal requirements. Then, use the template in a personnel or member record to quickly insert all the necessary items. This ensures that background checks and other requirements are set consistently based on employee role.

Background Check Templates

You can add a template with the background check items needed for a specific job or assignment. For example, a template called "Work with Children" might have the items "Federal Background" and "References".

1. On the File menu, click **Safe Environment > Background Check Templates**.
2. Click **Add Template**, and enter a name that describes who or what the template is used for, such as "New Employee" or "Office Worker".
3. Click the add icon  and select the background check items to include. When you insert the template in the Safe Environment window of a record, these items display in the order you list them here.
4. Click **Save/OK**.

Other Requirements Templates

You can add a template with the necessary legal requirements. For example, a template called "Volunteer Requirements" might have the items "Orientation Class", and "Sensitivity Training".

1. On the File menu, click **Safe Environment > Other Requirements Templates**.
2. Click **Add Template**, and enter a name that describes who or what the template is used for, such as "Childcare Worker" or "Evangelism".
3. Click the add icon  and select the requirement items to include. When you insert the template in the Safe Environment window of a record, these items display in the order you list them here.
4. Click **Save/OK**.

Using the Templates

Go to a personnel or individual record, and click **Safe Environment** in the navigation pane. In the [Background Check or Other Requirements section](#), click **Use Template**.

You can also use templates when posting or updating background checks and legal requirements.

Related Topics

[Manage Background Checks and Requirements](#)
[Post Student Background Check Information](#)

Post Legal Requirements
Post Personnel Background Check Information
Post Other Requirements