Catholic Diocese of Arlington

OPCYP Automation Training Manual

*User Documentation
for the
Office of Child Protection and Safety*

Table of Contents

Introduction

To increase OPCYP application processing efficiency, the CDA Offices of Child Protection and Safety and Information Technology partnered on an automated child protection compliance solution.

The online application:

- Decreases a new Employee or Volunteer's application creation time

- Eliminates illegible applications

- Provides faster criminal background check processing and results reporting
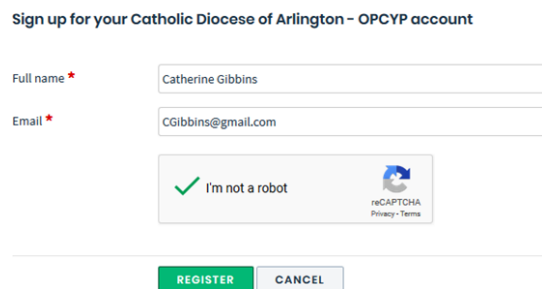
The management portal provides Liaisons and Business Managers with:

- Real-time compliance information

- The ability to update Employee and Volunteer contact information

- The ability to update Employee and Volunteer dates of service

- The ability to add new individuals to your location and designate their role and position

OPCYP Support

OPCYP implemented an online ticket system for questions and technical support. **This system should only be used by Liaisons and Business Managers and not by Applicants.** To use this system:

- Go to https://OPCYPSupport.freshdesk.com

  - Click SIGN UP to create a user account

  - Enter your full name and email address.

  - Click the *I'm not a robot* box and click REGISTER.

To submit a ticket to OPCYP

- Go to https://OPCYPSupport.freshdesk.com

  - Sign in with your username and password

o   Click New Support Ticket

o   Enter your email address in the Requester field

o   Enter a ticket subject in the Subject field

o   In the Type field, select Question or Problem from the drop-down list

o   Enter your question and/or describe the issue you are experiencing

o   Attach screenshots of any error messages you receive

Online Application Website

We recommend you use the Google Chrome browser for the online application.

We recommend you log out of any other arlingtondiocese.org windows before beginning the application.

Employees will need Applicant Type, Position, and Location information from their offer letter for the application.

We recommend Liaisons provide Volunteers with Applicant Type, Position and Location information before Volunteers begin the online application.

We recommend all applicants collect the following information before beginning the application:

- **SSN/ITIN**

- **Driver's license or state issue ID information**

- **15 years of residency information**

- **5 years of employment information**

Throughout the application, you will use ADD buttons to enter information.

The Employee application supports English, Spanish, Korean, and Vietnamese. DocuSign forms are in English and Spanish.

The Volunteer application supports English, Spanish, Korean and Vietnamese. English, Korean and Vietnamese applications currently have English DocuSign forms. Spanish applications have Spanish DocuSign forms.

New Employees

The CDA standardized employment offer letter provides needed online application information for the prospective new Employee. The offer letter template is available to Business Managers on the Benergy website. Business Managers can contact the CDA Parish Financial Liaison and the CDA Office of Human Resources for additional offer letter information.

Application information includes:

- OPCYP Online Application URL

- Role

- Position

- Employment Location

Login/Create Account

If an individual previously worked or volunteered at a diocesan site or registered for a diocesan event, he/she has an existing account.

If not, he/she may need to create an account.

Username Lookup

If an individual does not know his/her diocesan website username and password, he/she can look up their username first and then their password.

1. Open a browser window. We recommend Google Chrome.

2. Go to https://www.arlingtondiocese.org/Child-Protection/

3. Click the appropriate Employee or Volunteer button.

NEW: Apply Online

In an effort to streamline the background check application process, the Office of Child Protection is now offering the ability to apply online. Continue below by selecting your role to access and electronically sign your forms.

EMPLOYEE

VOLUNTEER

4. The selected application opens.

5. Select your preferred language.

6. Click the username link.

7. Enter your email address and click SUBMIT.

8. An email with your username is sent to your email address OR a message shows the email is not in the diocesan database, and you will create a new account.

9. In the email, click the provided link and reset your password.

10. Once reset, you return to the application website to login.

Create a New Account

If an individual does not have a diocesan database account, he/she will create a new account. A social security number (SSN) or an Individual Taxpayer Identification Number (ITIN) is required for Employees but not for Volunteers. To facilitate the criminal background check, if a Volunteer has an SSN or ITIN, they should enter the number in the SSN/ITIN field.

1. Open a browser window. We recommend Google Chrome.

2. Go to https://www.arlingtondiocese.org/Child-Protection/

3. Click the appropriate Employee or Volunteer button.

4. The selected application opens.

5. Select your preferred language.

6. Click CREATE YOUR ACCOUNT TODAY.

7. Enter information in each field. Fields with an * are required fields.

a. If an Employee does not have an SSN or ITIN, contact OPCYP at 703.841.3847 for assistance.

8. Click CONTINUE.

9. If the SSN/ITIN number is already in the diocesan database, the following error message displays. Contact OPCYP at 703.841.3847 OR submit a support ticket at https://OPCYPSupport.freshdesk.com for assistance.

The SSN you entered is already in use. Please contact OPCYP for further assistance.

Online Application Main Page

Once you login to the online application website, you see application status information.

Application Status

Applicant Information - Incomplete
Personal Information - Incomplete
Criminal Background - Incomplete
Employment/Volunteer History - Incomplete

The application is divided into four (4) sections. Users can complete the sections in any order and the application in a single session, or multiple sessions.

Applicant Information

To enter Applicant Information:

1. Click the Applicant Information tab.

Applicant Information	Personal Information	Criminal Background	Employment/Volunteer History

2. Click the ENTER/EDIT APPLICANT INFORMATION button.

ENTER/EDIT APPLICANT
INFORMATION

3. For Employees - enter the Applicant Information provided on the offer letter and click
CONTINUE. Fields with an * are required fields.

Applicant Information

Applicant Type *

Employee ▾

Position *

SAC-Teacher-ES ▾

Location *

St Rita School ▾

For Volunteers - enter the Applicant Information provided by your Liaison and click
CONTINUE. Fields with an * are required fields

Applicant Information

Applicant Type *

Volunteer ▾

Position *

V-WorkCamp Contra ▾

Location *

St Rita School ▾

Volunteer Ministry *

Youth Ministry ▾

What best describes what you will be doing for the Church? *

Youth ▾

4. On the main page, you see the updated Application Status.

Application Status

Applicant Information - Complete
Personal Information - Incomplete
Criminal Background - Incomplete
Employment/Volunteer History - Incomplete

Personal Information

To enter Personal Information:

1. Click the Personal Information tab.

| Applicant Information | Personal Information | Criminal Background | Employment/Volunteer History |

2. Click the ENTER/EDIT PERSONAL INFORMATION button.

ENTER/EDIT PERSONAL INFORMATION

3. Enter your information in the Personal Information fields and click CONTINUE. Fields with an * are required fields.

Personal Information

Prefix *	[▼]
First Name *	Alana
Middle Name *	Middle Exception: [▼]
Last Name *	Smith
Suffix	[▼]
Middle Name at Birth *	Middle Exception: [▼]
Maiden Last Name	
Aliases	
Gender *	Female ▼

a. Middle Name – enter your current full middle name or use the Exception drop down for Middle Initial Only or No Middle Name.

b. Middle Name at Birth - enter your full middle name at birth or use the Exception drop down for Middle Initial Only or No Middle Name.

c. Aliases – enter all previous legal and AKA (also known as) names you have used.

d. Residence Information

          i. Click the ADD button to enter previous addresses for the last 15 years

                  +

          ii. Approximate Start Date – use your best estimate for this date.

          iii. Approximate End Date – use your best estimate for this date.

    e. Family Information

          i. Marital Status – for all statuses but Single, click the ADD button to enter all previous spouses.

                  +

          ii. Children – if the Applicant answers Yes, click the ADD button to enter ALL children, foster children, stepchildren, adult children and children not living with you.

                  +

4. On the main page, you see the updated Application Status.

Application Status

Applicant Information - Complete
Personal Information - Complete
Criminal Background - Incomplete
Employment/Volunteer History - Incomplete

Criminal Background

To enter Criminal Background:

1. Click the Criminal Background tab.

Applicant Information	Personal Information	Criminal Background	Employment/Volunteer History

2. Click the ENTER/EDIT CRIMINAL BACKGROUND button.

ENTER/EDIT CRIMINAL BACKGROUND
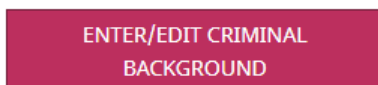
3. Enter your information in the Criminal Record fields and click CONTINUE. Fields with an * are required fields.

Criminal Record

Have you ever been convicted of a crime (felony or misdemeanor) other than a minor traffic violation? *

[▾]

Are you under any pending charges or indictments? *

[▾]

Have you ever had a civil complaint filed against you? *

[▾]

     a. Convicted of a crime (felony or misdemeanor)

        i. Click the ADD button to enter all convictions.

[**+**]

        ii. Include the date and place of any convictions, and the crime for which you were convicted.

     b. Under any pending charges or indictments

        i. If yes, a box appears to enter the requested information.

        ii. Use the box's bottom right corner resize bars to resize the box.

     c. Civil complaint filed against you

        i. "A civil complaint initiates a civil lawsuit by setting forth for the court a claim for relief from damages caused, or wrongful conduct engaged in, by the defendant." – https://legal-dictionary.thefreedictionary.com/civil+complaint

        ii. If yes, a box appears to enter the requested incident information.

        iii. Use the box's bottom right corner resize bars to resize the box.

   4. On the main page, you see the updated Application Status.

Application Status

Applicant Information - Complete
Personal Information - Complete
Criminal Background - Complete
Employment/Volunteer History - Incomplete

Employment/Volunteer History

To enter Employment/Volunteer History:

   1. Click the Employment/Volunteer History tab.

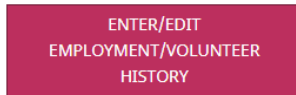| Applicant Information | Personal Information | Criminal Background | **Employment/Volunteer History** |

2. Click the ENTER/EDIT EMPLOYMENT/VOLUNTEER HISTORY button.

3. Enter your information in the Employment/Volunteer History fields and click CONTINUE. Fields with an * are required fields

Employment/Volunteer History

Are you currently an employee of a Catholic organization in Virginia? *

Employment History

ADD Employment History

Company ▲	Work Phone	Address	City	State	Zip	Employee Position	Approx Start Date	Approx End Date	Supervis

Have you ever quit or been terminated from any employment or volunteer service for reasons relating to allegations of sexual misconduct or child abuse by you? *

a. Employment History

   i. Click the ADD button to enter employment history.

   ii. Enter your most recent five (5) years of employment history.

   iii. Enter any period of unemployment that exceeds six (6) months.

   iv. Student and Homemaker are valid employment positions.

b. Ever quit or been terminated from any employment or volunteer service for reasons relating to allegations of sexual misconduct or child abuse by you

   i. If yes, a box appears to enter the requested incident information.

   ii. Use the box's bottom right corner resize bars to resize the box.

c. Ever been subject to any disciplinary action for reasons relating to allegations of sexual misconduct or child abuse by you

   i. If yes, a box appears to enter the requested information.

   ii. Use the box's bottom right corner resize bars to resize the box.

        d. Presently serve, or have you ever served as a volunteer for any organization, entity or group in which you had significant contact with children or other vulnerable populations

             i. If yes, a box appears to enter the requested information.

             ii. Use the box's bottom right corner resize bars to resize the box.

4. On the main page, you see the updated Application Status.

Application Status

Applicant Information - Complete
Personal Information - Complete
Criminal Background - Complete
Employment/Volunteer History - Complete

Online Application Review

When all online application sections are completed, the application status for each section is marked Complete.

Application Status

Applicant Information - Complete
Personal Information - Complete
Criminal Background - Complete
Employment/Volunteer History - Complete

Before signing your online application, CAREFULLY review all information in each section.

Sign Out

If you do not complete your online application and wish to return to complete it later, click Sign Out.

Sign Out

To return to the application, use the URL provided above and login with your diocesan database username and password.

DocuSign

DocuSign is an electronic document signature software solution, which is integrated with the online application. The Applicant's data will be electronically entered onto all OPCYP forms, then these forms will be bundled into an electronic envelope. All forms, except the Central Registry Release of Information (CPS) form, will be signed and submitted to OPCYP electronically.

• Applicants will use DocuSign to review and sign their application forms.

- Liaisons will use DocuSign to reject or approve an Applicant's application forms.

Prepare Applicant Forms for Signatures

1. To proceed to DocuSign, click FINISH.

Application Status

Applicant Information - Complete
Personal Information - Complete
Criminal Background - Complete
Employment/Volunteer History - Complete

Congratulations! Your application is complete. Please click the "Finish" button to proceed to signing your legal documents.

FINISH

2. If you are ready to electronically sign your documents, click SUBMIT APPLICATION. If you want to review your application again, click RETURN TO APPLICATION.

Proceeding beyond this point will result in legal documents being issued

It's very important to ensure that you have provided accurate data. Please ensure that you have completed your application fully and that all of the information you have provided is correct.

Once you select to process your application, it may take up to a minute to complete

Please do not navigate away from this page

SUBMIT APPLICATION

RETURN TO APPLICATION

3. After clicking SUBMIT APPLICATION, the DocuSign forms are rendered, and the PROCESSING message appears. This process could take up to one (1) minute. Do not click any buttons or change pages until you receive the Thank you! Page.

PROCESSING/PROCESANDO/GAGONG/CHẾ BIẾ

4. Once your DocuSign documents are created and bundled into an envelope, the Thank you! Page appears, and an email notification is sent to your specified email address.

Thank you!

The online portion of your application is complete. You will receive an email notification regarding legal documents you need to sign to proceed with the next step of the application process.

Applicant Signatures with DocuSign

It is <u>critical</u> the Applicant selects the correct Location for their application. This ensures their forms are routed to the correct Liaison. If forms are not sent to the correct Liaison, submit a ticket to the OPCYP Freshdesk.

The Applicant should review their documents very carefully. If any errors are found, they should decline to sign the forms, return to the application to make the needed changes, and then recreate their forms for signature.
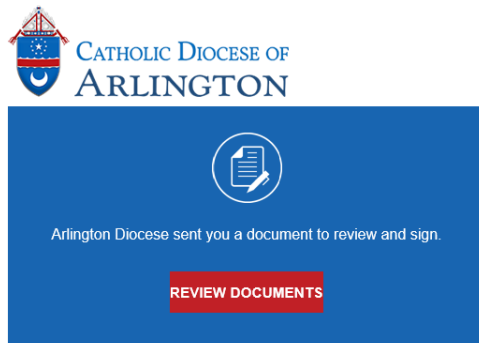
Upon Applicant signature, the Liaison will review the Applicant's forms. If any errors are found, the Liaison will decline to sign the forms, and note the decline reason(s) for the Applicant. The Applicant will return to the CDA application website (not DocuSign) to make the needed changes, and then recreate their forms for signature. Once signed, the newly completed forms will return to the Liaison for review and signature. If forms are declined by either the Applicant or the Liaison, the original forms envelope is automatically deleted by DocuSign. A new envelope is created when updated forms are signed by the Applicant.

Emails are sent automatically when forms are ready for signature. Additional reminder emails are sent every 7 days until the envelope expires at 30 days. An expiration warning goes out 3 days before the envelope is voided.

Once the forms are approved and signed by both the Applicant and Liaison, the approval information is written into the diocesan database. Within 24 hours of completion, the Applicant's background check information is sent electronically for processing. Results will be returned in 3 to 5 business days.

Review Documents

1. The Applicant receives an email with a link to sign forms.

2. Click REVIEW DOCUMENTS in the email.

3. A DocuSign window opens.
   Please read the Electronic Record and Signature Disclosure and then click the 'I agree…' box.
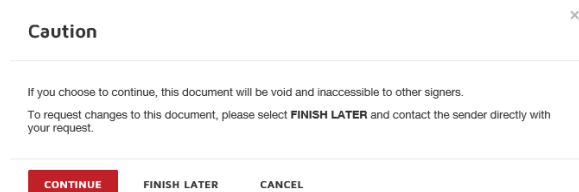

4. Click CONTINUE.

5. Do NOT click the START button.
    Use the scroll buttons and scroll bar to carefully review all the documents in the
    DocuSign envelope.

Decline to Sign

1. Decline to Sign

    a. If you find any errors which require correction, click OTHER ACTIONS and
        select Decline to Sign.

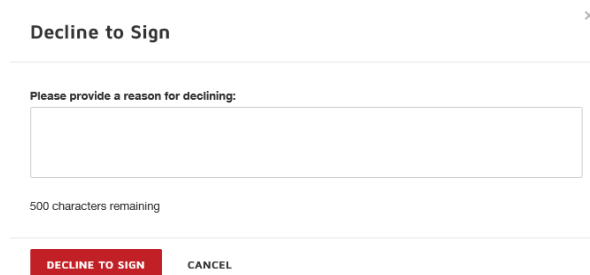   b. On the Caution panel, click CONTINUE to delete the current forms envelope.

    > **Caution**   ×
    >
    > If you choose to continue, this document will be void and inaccessible to other signers.
    > To request changes to this document, please select **FINISH LATER** and contact the sender directly with
    > your request.
    >
    > **CONTINUE**   FINISH LATER   CANCEL
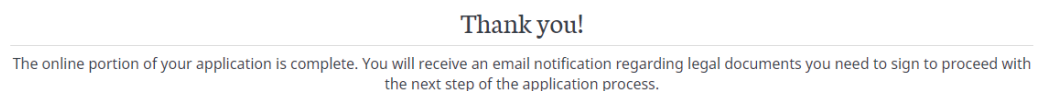
    c. On the Decline to Sign panel, click DECLINE TO SIGN.

    > **Decline to Sign**   ×
    >
    > **Please provide a reason for declining:**
    >
    > [   ]
    >
    > 500 characters remaining
    >
    > **DECLINE TO SIGN**   CANCEL
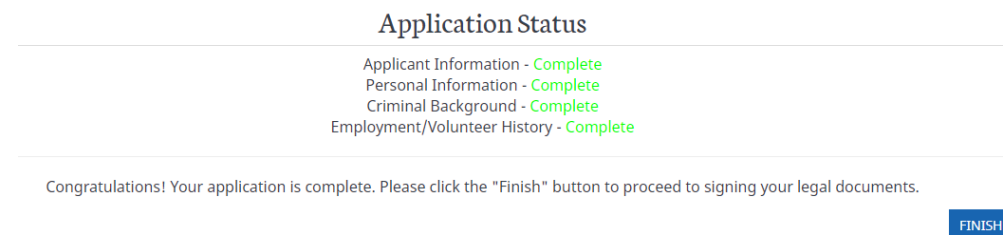
    d. Return to the online application Thank you! Page window.

    > ## Thank you!
    > The online portion of your application is complete. You will receive an email notification regarding legal documents you need to sign to proceed with
    > the next step of the application process.

    e. Click the web browser back button until you return to the Application Status page.

    > ## Application Status
    > Applicant Information - Complete
    > Personal Information - Complete
    > Criminal Background - Complete
    > Employment/Volunteer History - Complete
    >
    > Congratulations! Your application is complete. Please click the "Finish" button to proceed to signing your legal documents.
    >
    > FINISH

    f. Select the appropriate tab section, click the Enter/Edit button, and update your
        information.

    g. Click CONTINUE.

2. To electronically sign your application forms, click FINISH.

<div align="center">

Application Status

Applicant Information - Complete
Personal Information - Complete
Criminal Background - Complete
Employment/Volunteer History - Complete

Congratulations! Your application is complete. Please click the "Finish" button to proceed to signing your legal documents.

FINISH

</div>

3. If you are ready to electronically sign your documents, click SUBMIT APPLICATION. If you want to review your application again, click RETURN TO APPLICATION.

<div align="center">

Proceeding beyond this point will result in legal documents being issued

It's very important to ensure that you have provided accurate data. Please ensure that you have completed your application fully and that all of the information you have provided is correct.

Once you select to process your application, it may take up to a minute to complete

Please do not navigate away from this page

SUBMIT APPLICATION

RETURN TO APPLICATION

</div>

4. After clicking SUBMIT APPLICATION, the DocuSign forms are rendered, and the PROCESSING message appears. Do not click any buttons or change pages until you receive the Thank you! Page.

<div align="center">

PROCESSING/PROCESANDO/GAGONG/CHẾ BIẾ

</div>

5. Once your DocuSign documents are created, the Thank you! Page appears, and an email notification is sent to your specified email address.

<div align="center">

Thank you!

The online portion of your application is complete. You will receive an email notification regarding legal documents you need to sign to proceed with the next step of the application process.

</div>

6. Continue with the Accept and Sign instructions below.

Accept and Sign

1. The Applicant receives an email with a link to sign forms.

2. Click REVIEW DOCUMENTS in the email.
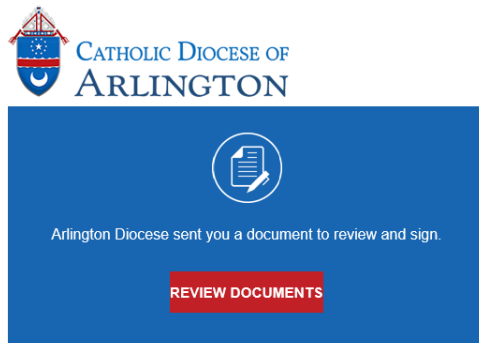
3. A DocuSign window opens.
   Please read the Electronic Record and Signature Disclosure and then click the 'I agree…'
   box.
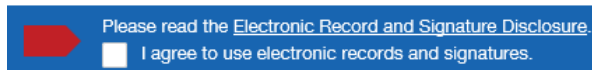
4. Click CONTINUE.

5. Do NOT click the START button.
   Use the scroll buttons and scroll bar to carefully review all the documents in the
   DocuSign envelope.

6. After reviewing all forms, return to the top of the DocuSign page and click START.

7. Click Sign on the signature line.

8. The Adopt Your Signature panel appears.

9. If you wish to change your signature text, update the Full Name field.

10. If you wish to change the signature style, click Change Style, and click the desired signature style.

11. Click ADOPT AND SIGN.

12. The page scrolls to the next required signature location. Click Sign.

13. Continue adding your signature to each signature location until you reach the end of the DocuSign page.

14. If you wish to save your completed forms, click the Download button.

15. If you wish to print your completed forms, click the Print button.

16. When finished, click FINISH.

17. DocuSign is now sending your forms to your Liaison for review and approval.

    a. If your Liaison rejects your forms:

        i. Return to the online application.
            https://www.arlingtondiocese.org/Child-Protection/

        ii. Select the appropriate application type – Employee or Volunteer – and login.

iii. Make the requested updates.

iv. Recreate your DocuSign forms.

v. Sign and Finish your forms.

b. If your Liaison approves your forms, you have successfully completed the online application!

i. Contact your Liaison to notarize your Virginia Central Registry Release of Information (CPS) form.

ii. Go to www.virtus.org to register for VIRTUS training.

iii. For Employees, go to www.fieldprint.com to register for fingerprinting.

1. Use code FPDioceseArlington

Liaison Signature with DocuSign

Liaisons use DocuSign to review and approve all Applicant's online application forms. There is one designated DocuSign user at each diocesan location.

Before starting any leave, please contact OPCYP to designate an alternate forms approver during your absence. Submit a support ticket at https://OPCYPSupport.freshdesk.com **or call 703.841.3847.**
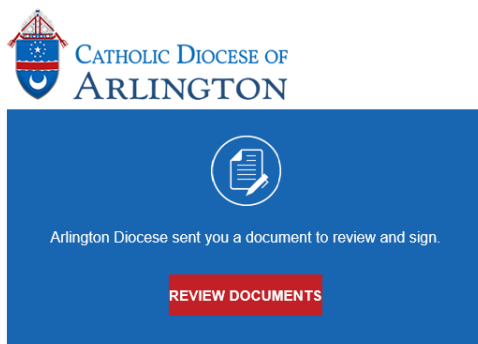
When reviewing an Applicant's DocuSign forms, the Office of Child Protection and Safety requests Liaisons pay particular attention to the following:

- Verify the legal name
  - When notarizing the Central Registry Release of Information (CPS) form, proper identification is needed
  - The CPS form must be printed on white 8 ½ X 11 White Paper with no white-out or strike-outs.
- AKA Names
- Additional Last Names
- Middle Name
  - Cannot be the same as the maiden name. The individual should provide the middle name given at birth as it appeared on the birth certificate at the time of birth.
- Maiden Names
- Dates of Birth
  - Must be accurate
- Fifteen (15) Year Address History

- - If the individual has lived at the same address, the rest of address fields are blanked, marked n/a
- Number of Children

- Five (5) Year Employment History
  - Explain a gap of unemployment greater than 6 months

- Signed and Notarized Central Registry Release of Information (CPS) form
  - There are seven (7) notarial acts and distinct elements for VA Notaries
  - Printing the proper sized paper - 8 ½" x 11"

- Civil Complaint
  - Wrongdoing against a person
    - Ex: Sexual Harassment
  - Internal Complaints
  - Description of the incident
    - When did it happen?
    - Where did it happen?
    - The nature of the resolution

- Criminal Complaint

Accessing an Applicant's DocuSign Forms

1. The Liaison receives an email with a link to sign the forms.
2. Click REVIEW DOCUMENTS in the email.

3. A DocuSign window opens.
   Please read the Electronic Record and Signature Disclosure and then click the 'I agree…' box.
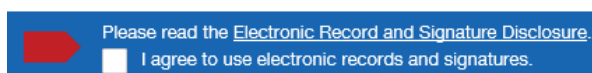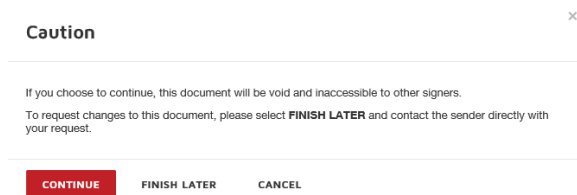
4. Click CONTINUE.

5. Do NOT click the START button.
Use the scroll buttons and scroll bar to carefully review all the documents in the DocuSign envelope.

Decline to Sign

1. Decline to Sign

   a. If you find any errors which require correction, click OTHER ACTIONS and select Decline to Sign.

   b. On the Caution panel, click CONTINUE to delete the current forms envelope.

   c. On the Decline to Sign panel, enter information for why you are rejecting the Applicant's forms, and click DECLINE TO SIGN.

   d. DocuSign displays a Declined to Sign page and sends an email to the Applicant and to the Liaison.

    e.   The Applicant can make the required updates and then submit updated forms for review and approval.

Accept and Sign

1. After the Applicant updates and resubmits his/her DocuSign forms, the Liaison receives an email with a link to sign the forms.

2. Click REVIEW DOCUMENTS in the email.

3. A DocuSign window opens.
   Please read the Electronic Record and Signature Disclosure and then click the 'I agree…' box.
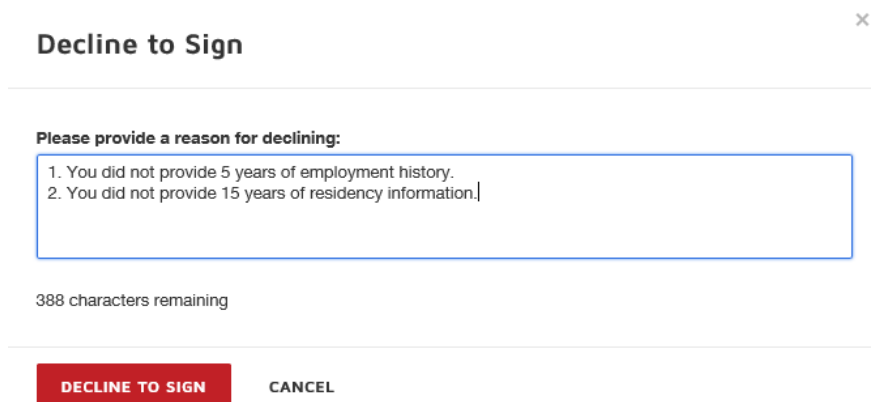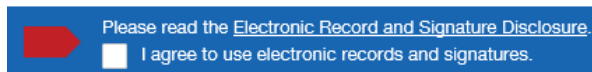

4. Click CONTINUE.

5. Do NOT click the START button.
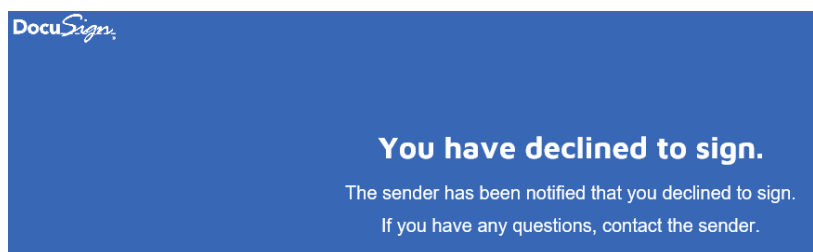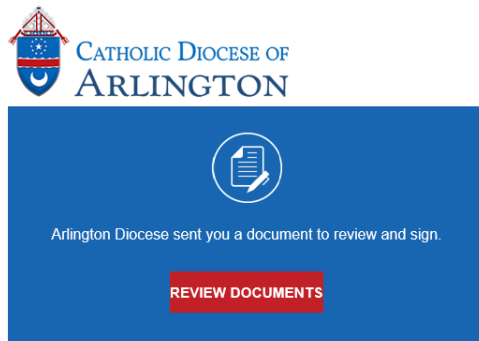   Use the scroll buttons and scroll bar to carefully review all the documents in the DocuSign envelope.

6. After reviewing all forms, return to the top of the DocuSign page and click START.

7. The page scrolls and stops at the needed signature location. Click the Sign button on the signature line.

8. The Adopt Your Signature panel appears.

9. If you wish to change your signature text, update the Full Name field.

10. If you wish to change the signature style, click Change Style, and click the desired signature style.

11. Click ADOPT AND SIGN.

12. To save your completed forms, click the Download button.

13. Select Separate PDFs.

14. Print the VA Department of Social Services form and any other desired forms.

    a. Click the Print button.

    b. User your browser's print services to select a printer and the pages to print.

15. When finished, click FINISH.

16. All application data and the forms approval are now saved in the diocesan database.

17. Within 24 hours, the Applicant's background check information is sent electronically. Results will be returned in 3 to 5 business days.

Upon Forms Approval

- **Print the Applicant's Virginia Central Registry Release of Information (CPS) form**

- **Coordinate with the Applicant to have the form notarized.**

- **Mail/deliver the notarized Central Registry Release of Information (CPS) form to the Office of Child Protection and Safety with a cover letter included. We recommend you mail/deliver the form flat, not folded.**

DocuSign Security

To enhance security on unsigned documents, each Applicant and Liaison forms envelope email link will expire after either 48 hours or five (5) clicks. If you attempt to access the link after expiration, you will receive the following message:
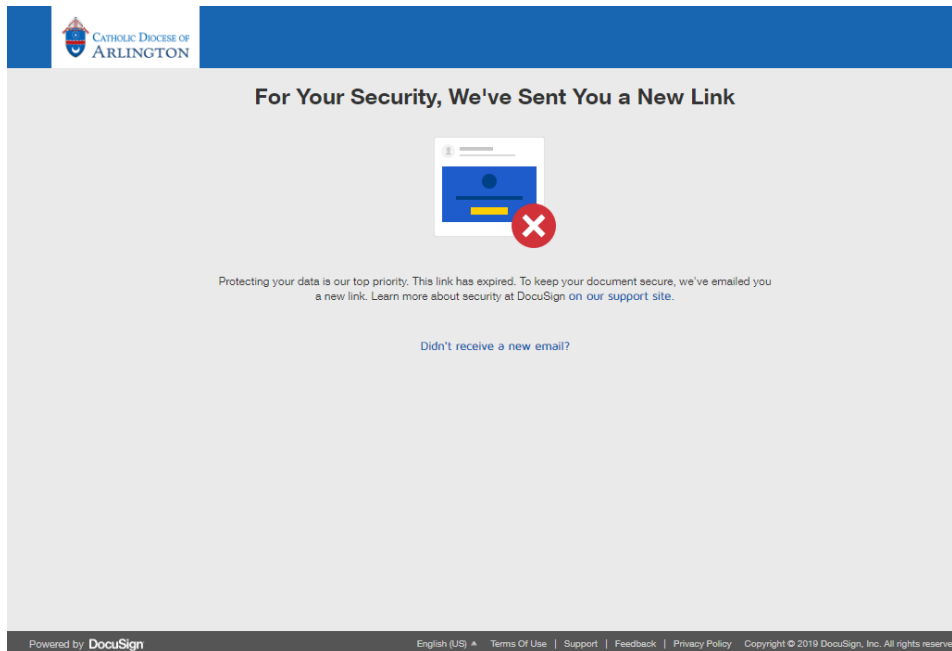
1. If you receive this message, check your email for a new document link.
2. Click the new link
3. Review and sign the forms.

Create a DocuSign Account

Instead of using forms links within email messages, you may create a DocuSign account to manage forms reviews, printing CPS forms, and signatures.

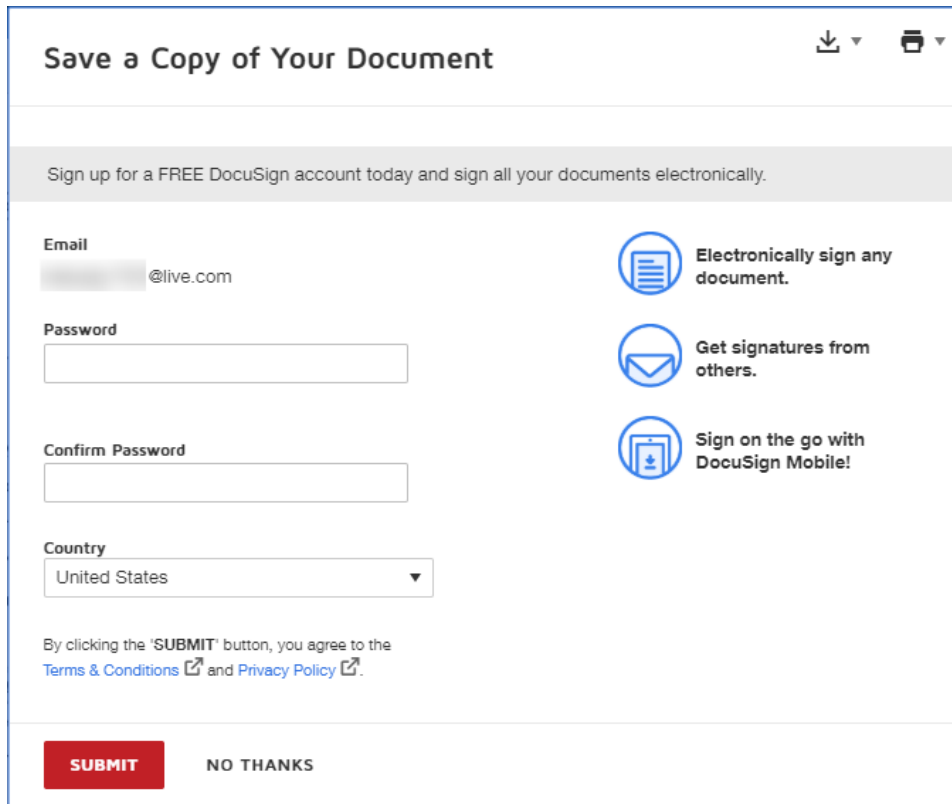The account will provide a 30-day trial of DocuSign, which allows you to create and send documents as well as receive them. After the 30-day trial, you can switch to a free account, which allows you to sign documents you are sent, and review older documents.

From the DocuSign Website

1. In a browser window, go to https://www.docusign.com
2. Click GET STARTED and complete the online form.

After Signing Forms

After documents in an envelope are signed, you are given an opportunity to create a DocuSign account:

1. Enter a password, select your country, and click **Submit**.

2. In a browser window, go to https://www.docusign.com

3. Click **Sign In** to log in using your email address and password.

Management Portal

Liaisons and Business Managers have a Management Portal to view OPCYP compliance information at their designated location(s).

Use your OPCYP Compliance Report website username and password to access the Management Portal.
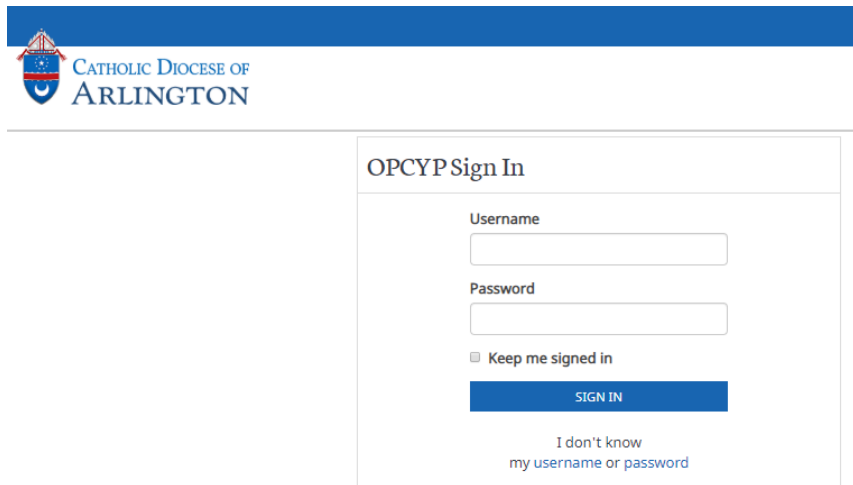
We recommend you use the Google Chrome browser for the management portal.

We recommend you log out of any other arlingtondiocese.org windows before opening the management portal.

Login to Management Portal

1. Open a browser window and enter https://secure4.arlingtondiocese.org/OPCYP_Portal/

2. Enter your OPCYP Compliance Report website username and password and click SIGN IN.

3. Use the drop-down to select your location and click SUBMIT.

View Portal Information

1. The portal Dashboard displays location summary information.

    a. Applications in Process - Applications which have been started, but the DocuSign process is not complete

    b. Waiting Background Check - Completed applications without a CBC verdict

    c. Awaiting Renewal - Background check expirations within 2 months of current date

2. Use the Select a query drop-down to select a list to view.

Select a query

All Records ▾

    a. All Records – All Employees and Volunteers with an active EV activity at selected location

    b. Current Employees – All Employees with an active EV activity at selected location

    c. Current Volunteers – All Volunteers with an active EV activity at selected location

    d. Recently Ended - Employees and Volunteers with an EV activity end date within 30 days of current date and without any other active EV activities

    e. Applications in Process - Application which have been started, but the DocuSign process is not complete

    f. Waiting Background Check - Completed applications without a CBC verdict

    g. Awaiting Renewal - Background check expirations within 2 months of current date

3. Use the navigation and display tools to view additional pages.

⏮ ◀ **1** 2 ▶ ⏭	Page: 1 of 2 Go	Page size: 35 Change	Item **1** to **35** of **38**

Show all 38

    a. The ⏮ button takes you to page 1.

    b. The ◀ button takes you to the previous page.

    c. The ▶ button takes you to the next page.

    d. The ⏭ button takes you to the last page.

    e. The **1** 2 buttons takes you to a specific page.

    f. The Page: 1 of 2 Go tool takes you to a specific page.

    g. The Page size: field lets you set the number of individuals to display on a page.

Page size: 35 Change

4. Click a column heading to sort your list in ascending or descending order.

ID	Last Name	First Name	Email	Position	Compliance Status

5. Click an individual's ID to open the Profile Page.

237820	Kent	James	jkent@gmail.com

6. On the Profile Page, you can view:

    a. Name and ID information

Mr. James R. Kent, II

ID	237820

    b. Phone, email, and address information

Phone: (703) 555-1212

Email: jkent@gmail.com

Address:
123 Main Street
Arlington, VA 22203

    c. EV Activities

        i. Employee and Volunteer information

EV Activities   ADD

Transaction ▲ Date	Location	Role	Position	Title	Start Date	End Date	Notes

    d. CPS and Fingerprint Reports File Download

File Download

CPS Report	Date
Fingerprint Report	Date

e. DocuSign forms envelope information.

▲ Envelope ID	Date	Status	Decline_Reason

f. OPCYP Compliance Actions and Results information

Actions and Results

Action	Trans Date	Date Sent	Approval Date	Results
Background Check Renewal	4/17/2018	4/17/2018	4/24/2018	CLEAR
Initial Safe Environment Training	9/14/2013		8/13/2013	ATTENDED
Acknowledgement Of Receipt	4/11/2013		4/11/2013	COMPLETE
Authorization & Waiver Form	4/11/2013		4/11/2013	FILED
Diocese of Arlington Background Check	4/11/2013	4/11/2013	4/17/2013	CLEAR
Code of Conduct	4/11/2013		4/11/2013	FILED
Central Registry Search	4/11/2013	4/11/2013	5/20/2013	CLEAR
Questionnaire	4/11/2013		4/11/2013	COMPLETE

Export Portal Information

You can export your list to Excel for additional data manipulation.

1. Use the column headers to sort your data.
2. Click EXPORT.

EXPORT ▾

3. Select CSV.
4. Use your browser tools to open the ResultsGrid_ExportData.csv file.
5. The file opens in MS Excel.

Run a Compliance or Recertification Report

1. From the Dashboard page, click REPORTS.

REPORTS

2. The Compliance Report page displays.

Compliance Report

Please click the button below to begin the process of generating the online compliance report for your location (s). Generating the report may take a few moments... please, click only once.

Select a location   [162 - The Church of ⬇]

Generate report for   [All Records ⌄]

Generate report

3. Select a location from the drop-down list.
4. Select the records to print from the drop-down list.
    a. All Records
    b. All Employees
    c. All Volunteers
    d. Volunteers-RE
    e. Volunteers-Scouts
    f. Volunteers-Youth Ministry
5. Click Generate report.
6. The Compliance Report displays in a new browser window.
7. Save or print, as needed.
8. Return to the Portal window.
9. Click the Recertification Report link.

Click here for Recertification Report

10. The Recertification Estimate Report page displays.

Recertification Estimate Report

Please click the button below to begin the process of generating the online recertification report for your location(s). Generating the report may take a few moments... please, click only once.

Select a location   [128 - The Church of ⌄]

Begin Date   [07/01/2019]

End Date   [07/01/2020]

Sort by   [Name ⌄]

Generate report

11. Select a location from the drop-down list.

12. Enter your desired Begin Date.

13. Enter your desired End Date.

14. Select a Sort by option from the drop-down list.

    a. Name

    b. Renewal date

15. Click Generate report.

16. The Recertification Estimate Report displays in a new browser window.

17. Save or print, as needed.

18. Return to the Portal window.

Change Location

To facilitate viewing compliance information at an additional location, you can use the Change Location drop-down menu to select the desired location.

Change Location

[162 - St Veronica Chu ▾]

[SUBMIT]

1. Click the drop-down button.

2. Select the desired location.

3. Click SUBMIT.

Data Management

The Portal gives you the ability to update an individual's contact information and to view and manage Employee and Volunteer EV activities at your location. Keeping EV activities up-to-date facilitates:

- An active Employees and Volunteers list and their compliance status

- Quarterly compliance report reviews, signatures and submissions

- Timely and accurate background check renewals and their associated fees

- OPCYP audit preparations

In the Portal, you can:

1. Update an individual's contact information.

    a. Phone number

    b. Email address

      c.   Street address

      d.   City

      e.   State

      f.   Zip code

2. Enter an End Date of service for an active EV activity at your location.

3. Create an EV activity for new employment or a new volunteer position at your location.

Update Contact Information

1. From the Dashboard, click the ID link to open the individual's Profile Page.

    237820   Kent   James

2. Click EDIT below the individual's contact information.

    EDIT

3. Enter the updated information in the corresponding field(s).

4. Click SAVE.

    SAVE

Edit an Existing EV Activity for Your Location

For an existing EV activity, you have the ability to enter the End Date of service. If other updates are required, submit a ticket to OPCYP's Freshdesk portal with your requested information updates.

1. From the Dashboard, click the ID link to open the individual's Profile Page.

    237820   Kent   James

2. Find the individual's EV activity to update and click the Edit link.

EV Activities

Location	Role	Position	Start Date	End Date	
St Veronica Church	Employee	OffStf-Bookkeeper-NH	6/15/2016		Edit

3. Enter the End Date of service and click SAVE.

Edit/Add EV Record

Location:	162 - St Veronica Chu ▾
Position:	OffStf-Bookkeeper-N ▾
Role:	Employee ▾
Start Date:	06/15/2016 (MM/DD/YYYY)
End Date:	07/15/2019 (MM/DD/YYYY)

SAVE

4. Confirm the update is reflected on the individual's Profile Page.

EV Activities

Location	Role	Position	Start Date	End Date
St Veronica Church	Employee	OffStf-Bookkeeper-NH	6/15/2016	7/15/2019

Create a New EV Activity for Your Location

When an individual begins a new Employee or Volunteer position at your location, you enter a new EV Activity onto their Profile Page. If an Employee is changing positions at your location, maybe from Bookkeeper to Business Manager, you will enter an End Date of service for the old position and create a new EV Activity with new Position, Role and Start Date information.

1. From the Dashboard, click the ID link to open the individual's Profile Page.

237820   Kent   James

2. Click ADD E/V ACTIVITY.

ADD E/V ACTIVITY

3. Enter Location, Position, Role and Start Date information and click SAVE.

Edit/Add EV Record

Location:	162 - St Veronica Chu ▾
Position:	OffStf-Business Mgr ▾
Role:	Employee ▾
Start Date:	07/16/2019 (MM/DD/YYYY)
End Date:	MM/DD/YYYY (MM/DD/YYYY)

SAVE

4. Confirm the update is reflected on the individual's Profile Page.

EV Activities

Location	Role	Position	Start Date	End Date	
St Veronica Church	Employee	OffStf-Business Mgr 1-ES	7/16/2019		Edit
St Veronica Church	Employee	OffStf-Bookkeeper-NH	6/15/2016	7/15/2019	

CPS and Fingerprint Reports File Download

OPCYP staff will upload an individual's CPS report and Fingerprint report to their Profile page, along with the date received.

File Download

CPS Report	⬇Download file	Date	7/10/2019
Fingerprint Report		Date	

Click the Download file link to download, save and print the report.

DocuSign Forms Envelope Information.

The Applicant's DocuSign envelope information will display in the Envelope box.

▲ Envelope ID	Date	Status	Decline_Reason

Sign Out

When you finish using the Management Portal, click Sign Out.

Sign Out

Renewals

After the initial criminal background check, renewal background checks are run every five (5) years, if the Employee or Volunteer has an active EV activity.

On the first day of each month, Liaisons will receive renewal background check email messages listing Employees and Volunteers due for renewal in the coming 60 days, in chronological order. In addition, individual emails will be sent out 15 days before an Employee or Volunteer is up for renewal. **Renewals are automatically submitted 10 business days prior to current CBC expiration date.**

If you are not receiving these emails, submit a support ticket at
https://opcypsupport.freshdesk.com/support/home

- The Liaison will review the list and confirm each individual is still serving at their location.

- If an individual is no longer serving as an Employee or Volunteer, the Liaison will update the individual's EV activity End Date of service.

- If the individual remains active, a renewal background check will automatically run ten (10) days prior to the current CBC's expiration date.

The location will subsequently be billed for the renewal background check, so it is important for the Liaison to keep accurate Employee and Volunteer records.

Day-Care Employees

In addition to the 5-year CBC renewal, day-care Employees have additional Renewals requirements. These include:

- Virginia CPS renewal

- Fingerprinting renewal

Renewal process information for these is forthcoming from OPCYP.

Reactivations

If a formerly compliant Employee or Volunteer does not have any active EV activity for 6 months or more, and you wish to add them to your location, have them complete the full online application. Note that if they have previously completed the CPS form, it will not be included in the DocuSign envelope.

Compliant Volunteer to Employee

All Employees require fingerprinting. If a compliant Volunteer is hired at your location, use the Portal to confirm if he/she has fingerprint information noted. If not, provide the new Employee with Fieldprint information. The new Employee does not need to complete the full Application process again.

The Diocese of Arlington requires all Clergy and Employees to be fingerprinted. The following steps include the hyperlink and instructions to be fingerprinted using the Commonwealth of Virginia's fingerprinting vendor *Fieldprint*.

- Visit http://fieldprintvirginia.com
- Click on the "Schedule an Appointment" button.
- Enter an email address under "New Users/Sign Up" and click the "Sign Up" button. Follow the instructions for creating a Password and Security Question and then click "Sign Up and Continue".
- Enter the Fieldprint Code: **FPDioceseArlington**.

- Enter the contact and demographic information required by the FBI and schedule a fingerprint appointment at the location of your choosing.
- At the end of the process, print the Confirmation Page. Take the Confirmation Page with you to your fingerprint appointment, along with two forms of identification.
- If you have any questions or problems, you may contact the Fieldprint customer service team at 877-614-4364 or customerservice@fieldprint.com.