Compliance Report with DocuSign Approval Process

Instructions

1. Liaison: Ensures all Employee and Volunteer EV Activities are accurate and up to date in the OPCYP Portal.

2. Liaison:

   a. Logs into the OPCYP Portal and selects the location for which to generate a Compliance Report.

   b. On the Portal dashboard page, click the SUBMIT COMPLIANCE REPORT button.

3. Liaison:

   a. Opens email application and

   b. Opens the Arlington Diocese via DocuSign – OPCYP Compliance Report Confirmation email.

4. Liaison: Clicks REVIEW DOCUMENT button in the email.
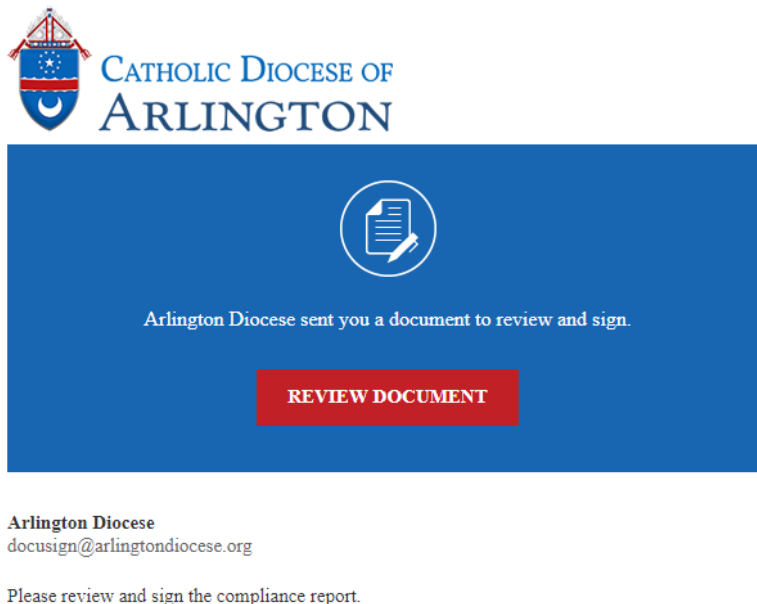
5. Liaison:
   a. Reviews the document,
   b. Adds electronic signature, and
   c. Clicks FINISH.
   d. *Optional: Liaison can create their own DocuSign account.*

6. DocuSign routs the Compliance Report to the Pastor/Principal for signature.

7. Pastor/Principal:
   a. Opens email application and
   b. Opens the Arlington Diocese via DocuSign – OPCYP Compliance Report Confirmation email.

Arlington Diocese via DocuSign   OPCYP Compliance Report Confirmation

8. Pastor/Principal clicks REVIEW DOCUMENT button in the email.

CATHOLIC DIOCESE OF
ARLINGTON

Arlington Diocese sent you a document to review and sign.

REVIEW DOCUMENT

Arlington Diocese
docusign@arlingtondiocese.org

Please review and sign the compliance report.

9. Pastor and/or Principal
   a. Reviews document,
   b. Adds electronic signature, and
   c. Clicks FINISH.
   d. *Optional: Pastor/Principal can create their own DocuSign account.*

10. DocuSign routs the Compliance Report to OPCYP staff for signature.

Compliance Report with DocuSign Approval Process

11. OPCYP staff opens email application and opens the Arlington Diocese via DocuSign – OPCYP Compliance Report Confirmation email.

Arlington Diocese via DocuSign   OPCYP Compliance Report Confirmation

12. OPCYP staff clicks REVIEW DOCUMENT button in the email.

13. OPCYP staff reviews document, adds electronic signature and clicks FINISH. Optionally, OPCYP staff can create their own DocuSign account.

14. OPCYP staff saves the completed Compliance Report to the CDA network.

15. All signers receive a Completed: OPCYP Compliance Report Confirmation email with a link to the completed Report.