

## Parish Place Audit

You will receive an email from 'Diocese of Coventry' with the subject 'Place Audit'. Click on the link at the bottom of the email to be taken to a summary page listing all the people currently holding auditable posts in your parish. The page will look similar to this:

 THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

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PLACE AUDIT

### HELLO MICHAEL,

Thank you for taking the time to fill in your place audit. Please note that any changes that you submit here are not immediate. They will be reviewed and moderated by your diocese. Below is the list of the posts from within your area that require auditing.

You are currently auditing the following roles: **PCC Secretary, Electoral Roll Officer, PCC Treasurer, Churchwarden Second, Administrator, Deanery Synod Laity, Churchwarden First, Safeguarding Officer.**

Within the following places: **APCM Test parish .**

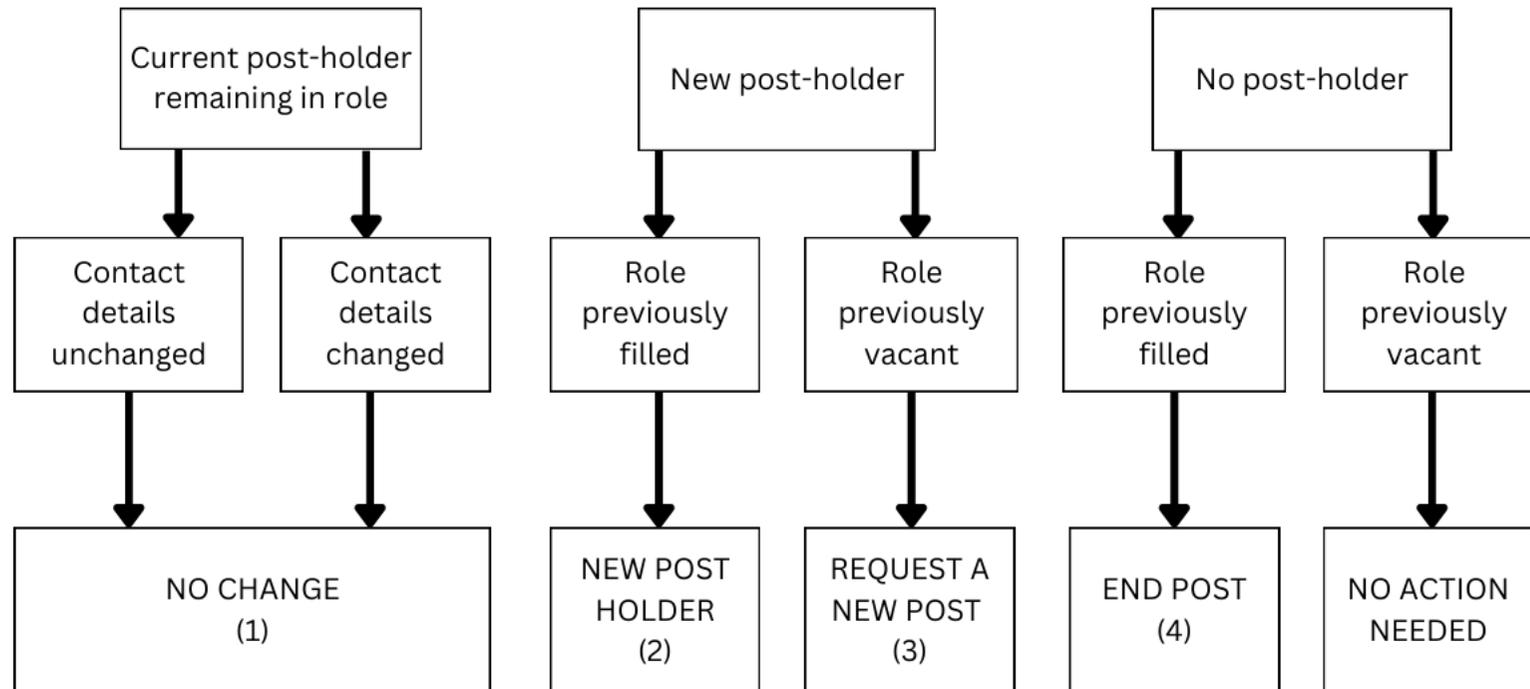
For each post there is a status column which will let you know if the post has already been audited. To start auditing, please click the view details button next to the post you would like to audit.

Currently, 0 out of 4 audits have been completed.

0% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
PCC Secretary	APCM Test parish (Parish)	Squire, Michael	05/02/2020		Waiting to be audited	<a href="#">View details</a>
Deanery Synod (Laity)	APCM Test parish (Parish)	Squire, Michael	11/12/2020		Waiting to be audited	<a href="#">View details</a>
PCC Treasurer	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Waiting to be audited	<a href="#">View details</a>
Churchwarden First	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Waiting to be audited	<a href="#">View details</a>

The action to be taken will vary depending on whether the same person is staying in the role or not. Please follow this flowchart to determine what action to take for each role:



Click on 'view details' for each role in turn and then select the relevant action:

The screenshot shows a web interface titled "YOUR SUBMISSION". At the top, there are three tabs: "1 Actions" (highlighted in purple), "2 Options", and "3 Review". Below the tabs, there are three large colored boxes representing different actions:

- NO CHANGE** (dark grey box): "If you believe the current post holder of this post is currently correct, you may make a submission of no change. You will next be prompted to review the current post holder's details." Below the text is a white downward-pointing chevron.
- NEW POST HOLDER** (teal box): "If a new contact is now in this post then you can searching for the new post holder within the CMS. If the post holder is not yet in the system, you can ask for a new record to be created." Below the text is a white downward-pointing chevron.
- END POST** (red box): "If the listed post holder is no longer in this post then you may end this post by setting the post's end date (past or future)." Below the text is a white downward-pointing chevron.

At the bottom left of the interface, there is a dark grey button with a white left-pointing arrow and the text "Return to post list".

## 1) NO CHANGE

*Select this option when the same person is remaining in post.*

If no changes are needed to the contact details, click 'continue to review'. On the next screen, select 'submit your audit for this post'. You will then be taken back to the summary page.

If changes are needed to the contact details, tick the check box 'if these contact details are incorrect and you would like to submit alternative details'. Enter the details of any amendments needed to the contact details then click 'continue to review' at the bottom of the page.

On the next screen, select 'submit your audit for this post'. You will then be taken back to the summary page.

## 2) NEW POST HOLDER

*Select this option when a new person is taking over from an existing post-holder.*

Often, the new post-holder already has a diocesan database profile as they may hold other roles or have held roles previously. In order to avoid duplicate records, you will be prompted to search so that the database can check for any existing matching profiles.

Enter the forename, surname, and email address and click 'search for an existing contact', this will display a list of potential matches. If there are many potential matches, select 'show more' to continue reviewing the list.

- a) If the person you are looking for is shown in the list, click 'select this contact'
- b) If the person you are looking for is not shown in the list, click 'request a new contact is created'.

You will be taken to a screen to review your selection and to set a succession (ie. start) date. This will usually be the date of your APCM.

There is also an option on this screen to let us know if the previous post holder has died. If this is the case, please tick the box.

When you are happy with the entered details, click 'continue to review' at the bottom of the page.

On the next screen, select 'submit your audit for this post'. You will then be taken back to the summary page.

## 3) REQUEST A NEW POST

*Select this option when a new person is filling a role that was previously vacant.*

From the summary page, select 'request a new post' at the bottom of the screen.

Request that a new post is created within the CMS

If you don't see a post that you believe should come under this audit's criteria, please use the following option.

This will submit a request to create a new post, with a contact to fill the new role.

Request a new post

This will open the following screen:

The screenshot shows a web form titled 'Place Audit' with a breadcrumb 'Place Audit / Request a new post'. The form is divided into two main sections: 'Post Details' and 'Post Holder Details'.  
The 'Post Details' section has a dark header and contains the instruction: 'Please enter the following details you would like to have on the new post...'. It features three input fields: 'Post Role' (a dropdown menu), 'Post Place' (a dropdown menu), and 'Start Date' (a text input field).  
The 'Post Holder Details' section has a dark header and contains the instruction: 'Here you may choose for a post holder to be added to the new role. You can choose to have an existing contact within the system, or for a new contact to be created. You may also choose to create a vacant post, instead of providing a post holder.' Below this is a sub-section titled 'Search for a new post holder' with the instruction: 'Please fill in the following information regarding the new post holder. Then click the search button to see if they already exist within our system.' This section includes three text input fields for 'Forename(s)', 'Surname', and 'Email address', and a blue button labeled 'Search for an existing contact »'.

In 'Post Role' – click the down arrow and select the role to be added (PCC Treasurer, PCC Secretary, etc)

In 'Post Place' – click the down arrow and **ensure that Parish is selected**.

Enter a Start Date, this will usually be the date of your APCM.

Often, the new post-holder already has a diocesan database profile as they may hold other roles or have held roles previously. In order to avoid duplicate records, you will be prompted to search so that the database can check for any existing matching profiles.

Enter the forename, surname, and email address and click 'search for an existing contact', this will display a list of potential matches. If there are many potential matches, select 'show more' to continue reviewing the list.

- a) If the person you are looking for is shown in the list, click 'select this contact'
- b) If the person you are looking for is not shown in the list, click 'request a new contact is created'.

You will be taken to a screen to review your selection. When you are happy with the details entered, click 'Submit with post holder'

#### **4) END POST**

*Select this option when a post-holder is standing down (or is deceased) but there is no-one currently available to fill the role.*

Enter the date that the person left their post, then click 'continue to review'.

There is also an option on this screen to let us know if the previous post holder has died. If this is the case, please tick the box.

#### **Emails to Contacts**

When a new contact is added, or an existing contact is modified, the user will receive an automatic email from the database. This will enable them to check and confirm their details and privacy settings.

#### **Completing the Place Audit**

Once you have audited each of the posts in the list with one of these options, the initial summary screen will show '100% completed' on the progress bar.

Your Place Audit is now complete and all of your submissions will be reviewed and confirmed by the diocesan database administrator.

#### **Need any help?**

If you think you made a mistake with any of the submissions, or if you need any further help, please contact [parish.info@coventry.anglican.org](mailto:parish.info@coventry.anglican.org)