



Completing Parish Officer Verification

(Place Audit)

A guide for Parish Contacts

What is Parish Officer Verification?

Parish Officer Verification is the new online way of recording the PCC officers in post in a parish following the Annual Meeting. It is also known as a Place Audit. This replaces the login via the diocesan website which parishes have used in previous years to update the data.

Following your parish's APCM, we would be grateful if you could please provide the details of officers appointed for your parish using the instructions below. It is important that the Diocesan Office holds accurate and up to date details of officers to ensure effective communication, compliance with data protection legislation and particularly in the case of Deanery Synod representatives to ensure that we have the correct details for the elections to General Synod.

Contact details for your PCC officers and Deanery Synod representatives are held on the Diocesan Database. These are not made public and are only accessible by Diocesan Staff and Volunteers. Parish Officers should be directed to the Diocesan Privacy Policy available on the diocesan website

<https://d3hgrrlq6yacptf.cloudfront.net/5f3ffdd147bb3/content/pages/documents/dd9a7a59dd21dc62f8af8789abe57c07bd1e7894.pdf>.

How to complete your Parish Officer verification

You will receive an email entitled "Annual return of Parish Officers following an APCM". This email will be sent to all Parish Contacts.

The email will have a link (underlined in blue).

When you are ready to complete your Parish Officers' verification (also known as Place Audit) please click on the link.

1. Open the link

You will be taken to a screen listing the posts in your PCC and the name of each officer currently recorded as being in post (see below).

PLACE AUDIT

HELLO KIM,

Thank you for taking the time to fill in your place audit. Below is the list of the posts from within your area that require auditing. 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.

Role	Place	Occupied by	Start date	End date	Status	
Gift Aid Secretary (Non-Dioc)	Someplace St Sample - 999 (Parish)	Orwell, George	1 January 2019		Waiting to be audited	View details
Health & Safety Officer	Someplace St Sample - 999 (Parish)	Orwell, George	1 January 2019		Waiting to be audited	View details
Parish Officer Verification	Someplace St Sample - 999 (Parish)	Fath, Gordon	1 January 2019		Waiting to be audited	View details
Secretary	Someplace St Sample - 999 (Parish)	Stanley, Kim	1 January 2019		Waiting to be audited	View details
Treasurer	Someplace St Sample - 999 (Parish)		28 February 2019		Waiting to be audited	View details

If a post is marked as "Vacant", it means that the Diocese does not currently have a post holder recorded, or a contact for that post.

If a post has a blue "Proxy" box next to a name, it means that the Diocese does not currently have a post holder recorded, and the named person is currently receiving any correspondence connected to the vacant post.

2. For each post, click on the "View details" button

The following screen (overleaf) will open up showing the details for that post holder. Please check the details.

POST DETAILS

Role	Health & Safety Officer
Place	Someplace St Sample - 999 (Parish)
Occupied by	Orwell, George
Start Date	1 January 2019
End Date	

CONTACT DETAILS

Contact name	Orwell, George
Primary Address	20 Long Road, Wigan,
Secondary Address	
Telephone	
Email Address	📧 george*****@email.com 📧

ARE THESE DETAILS INCORRECT?
If these contact details are incorrect and you would like to submit some alternative details, please write the new details in the box below and click save.

[Save](#)

ACTIONS

NO CHANGE
If you believe the details of this post are currently correct, you may make a submission of no change.

[No change](#)

END POST
Ending this post will set this post's end date to today and will create a new vacant post in it's place.

[End post](#)

SUCCEED POST
If a new contact is now in this post then you can either select an existing CMS contact or create a new contact to succeed the current contact occupying this post.

[Succeed post](#)

[Back to place audit](#)

If any of the contact details are incorrect, please note these in the box at the bottom of the screen and click **Save**.

ARE THESE DETAILS INCORRECT?
If these contact details are incorrect and you would like to submit some alternative details, please write the new details in the box below and click save.

[Save](#)

It is important to make sure the Save button is pressed to ensure any changes in contact details are recorded when the audit is submitted.

Please make sure that you do this before clicking one of the action buttons to the right. Once you have finished checking the details:

3. Click on one of the coloured action buttons.

You must click on one of the action buttons to complete the verification for each person.

ACTIONS

NO CHANGE
If you believe the details of this post are currently correct, you may make a submission of no change.

No change

END POST
Ending this post will set this post's end date to today and will create a new vacant post in it's place.

End post

SUCCEED POST
If a new contact is now in this post then you can either select an existing CMS contact or create a new contact to succeed the current contact occupying this post.

Succeed post

Back to place audit

No Change = The person recorded as holding the post already is correct

End post = The person listed as post holder is no longer in office and there is at present no one to take their place. This will then list the post as vacant.

Succeed post = The person listed as the post holder is no longer in office and a successor has been appointed.

3.1 If you have clicked NO CHANGE

Click OK on the box that pops up

cms.cofeportal.org says

Are you sure you would like to submit this post without making changes?

OK **Cancel**

You will be returned to the summary page for your Church/Parish and the entry you have just submitted will now be marked as "Submitted - No Change", and greyed out:

Health & Safety Officer	Someplace St Sample - 999 (Parish)	Orwell, George	1 January 2019	Submitted - No Change	View details
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3.2 If you have clicked END POST

End post is only to be selected if there is no one taking on the role after the existing office holder has left. If you have clicked end post and someone is taking over the position, please click the back button on your web browser to return you to the previous screen and click "Succeed post" instead.

To end a post *and list it as currently vacant*, in the actions box:

- i. type the date the position will become vacant (whether that is in the past or future)
- ii. tick the box marked "If you would like to create a vacant post in place of this post then please check this box"
- iii. click on the red button marked "End post and submit for moderation".

The screenshot shows a form titled 'ACTIONS' with the following elements:

- A text input field labeled 'Enter new end date *' containing the date '12/06/2019'.
- A checkbox labeled 'If you would you like to create a vacant post in place of this post, then please check the box.' which is currently unchecked.
- A prominent red button labeled 'End post and submit for moderation'.
- A grey button labeled 'Back to process post' at the bottom.

Arrows from the text instructions point to the date input field, the checkbox, and the red button.

You will be returned to the summary screen, where this post is now marked as "Submitted - Post Ended".

Parish Officer Verification	Someplace St Sample - 999 (Parish)	Fath, Gordon	1 January 2019	Submitted - Post Ended	View details
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3.3 If you have clicked SUCCEED POST

In the actions box:

- i. enter the date the new post holder will take over (in the past or future).
- ii. fill in the contact details box
- iii. click "Search for contact"

ACTIONS

Date of succession

Enter the date you would like this post to be succeeded *

12/06/2019

Contact details

Forename

Harry

Surname

Potter

Email address *

harry.potter@outlook.com

Search for contact

Back to process post

You will be shown a list of possible contacts:

Surname	Forenames	Known as	Email Address	
Potter	Harold	Harry	harry.potter@outlook.com	Select and submit for moderation

CREATE A NEW CONTACT

If none of the existing contacts are correct, or no existing contacts have been found, you can request that a new contact is created using the contact details that you searched on.

Request the creation of a new contact and submit for moderation

If the new post holder is not listed, click the box marked "Request the creation of a new contact and submit for moderation". Click OK in the confirmation box that appears.

If the new post holder is listed under existing CMS contacts, click the button marked "Select and submit for moderation" next to their name.

If the person is already in our database then you will not be asked for any further information. Please note that an email address is mandatory. If the individual hasn't got one then please contact Angela Bruno (angela.bruno@lichfield.anglican.org).

4. Repeat this process until all of your posts are marked as Submitted, including those listed as Vacant.

Your Parish Officer Verification (Place audit) is now complete. You can now close the window down. This will not cause any problems as the data has already been submitted to the system.

Questions and other things to note

- **Be aware that the data in your link is static**
The data was correct on the day you were sent your link. This information is not "live" once you've received the link, so if one of your officers has let us know directly of their change of details since we sent you the email, we may now hold more up to date information. So please can you **complete your verification as soon as possible after receiving your email with the link.**
- **Do you have a parish officer not shown on your list?**
If so, please get in touch with us directly, by emailing angela.bruno@lichfield.anglican.org or on 01543 306220.
- **What if there aren't enough roles listed?**
For example if there aren't enough roles to add all your Deanery Synod members, please get in touch with Angela Bruno, Database Manager (contact details above). Please note that District roles are attached to a church whereas Parish roles including all Deanery Synod representatives are attached to a parish. If any of these are incorrectly assigned please let Angela Bruno know.
- **What about Deputy or Assistant Wardens?**
We don't hold the details of deputy or assistant wardens only Church Wardens appointed by the Parish (PCC) or District (DCC) at the annual meetings so there is no need to include them.
- **What if I make a mistake?**
Please contact Angela Bruno (contact details above).
- **What happens next?**
You need not do anything else. The changes you have submitted will be moderated by a member of diocesan staff. If you have added a new Contact, they will be contacted directly to verify their own contact details and to confirm their data protection permissions. Once moderated, the changes will become live in the diocesan database.

Thank you for your help!