

Completing Parish Officer Verification

(Place Audit)

A guide for Parish Contacts

What is Parish Officer Verification?

Parish Officer Verification is the 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 used prior to 2020 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 elections to General Synod.

Contact details for your PCC officers, Deanery Synod representatives, employed administrators and employed youth, children and families workers 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://www.lichfield.anglican.org/privacy-policy.php>.

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).

Dear Parish Contact,

You have received this message as you are the main or nominated contact for your parish or church. Following your parish's APCM, we are asking that you please provide details of the officers appointed for your parish. It is important that the diocesan office holds accurate and up to date details of your parish officers so that we can ensure that the Diocese complies with UK GDPR.

Please follow this link:

<https://cms.cofeportal.org/place-audit/ZTreFAyhJD1rz1Jc2bmgST7R1g4fJ23b>

The link will take you to an online page that lists the parish officers in your parish currently recorded in the diocesan database. We are also seeking to confirm your **employed** parish administrators and **employed** youth, children and families workers where you have them. If you have anyone in these categories not listed please contact me with details (name, postal and email addresses, telephone numbers and date of starting employment).

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 DCC (if applicable) and the name of each officer currently recorded as being in post (see below). Click on the person you wish to audit by clicking on the VIEW DETAILS on the right of the screen.

PLACE AUDIT

HELLO LIZZY,

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, Treasurer, Parish Administrator, DCC Secretary, DCC Treasurer, Gift Aid Secretary, PCC Treasurer, PCC Treasurer Support, PCC 1 Warden, PCC 2 Warden.** [More](#)

Within the following places: **Anytown All Saints (Parish), Anytown All Saints (Church), Anytown CE(C) Primary School (School).**

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 9 audits have been completed.

0% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
PCC 1 Warden	Anytown All Saints (Parish)	Darcy, William	01/04/2021		Waiting to be audited	View details
Deanery Synod member	Anytown All Saints (Parish)	Darcy, William	01/12/2020		Waiting to be audited	View details
PCC 2 Warden	Anytown All Saints (Parish)	Bennett, Jane	01/05/2015		Waiting to be audited	View details
Deanery Synod member	Anytown All Saints (Parish)	Bennett, Jane	01/05/2014		Waiting to be audited	View details
PCC Treasurer	Anytown All Saints (Parish)	Grainger, Hermione	01/12/2016		Waiting to be audited	View details
PCC Secretary	Anytown All Saints (Parish)	Darcy, Lizzy	01/05/2013		Waiting to be audited	View details
Gift Aid Secretary	Anytown All Saints (Parish)	VACANT	01/06/2022		Waiting to be audited	View details
Deanery Synod member	Anytown All Saints (Parish)	VACANT	01/12/2020		Waiting to be audited	View details
Safeguarding Co-ordinator	Anytown All Saints (Parish)	VACANT	01/01/2023		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.

2. Click on one of the coloured action buttons.

You must click on one of the action buttons to complete the verification for each person. Please only click on END POST if you have no one to replace the current postholder. If you do have a new postholder to add then please click on NEW POST HOLDER.

POST DETAILS				
Role	Place	Occupied by	Start date	End date
PCC 1 Warden	Anytown All Saints (Parish)	Darcy, William	01/04/2021	

YOUR SUBMISSION		
1 Actions	2 Options	3 Review

NO CHANGE
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.

END POST
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).

NEW POST HOLDER
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.

2.1 If you have clicked No Change

1 Actions	2 Options	3 Review
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CURRENT POST HOLDER DETAILS

Contact Name: William Darcy

Primary Address: 1 Any Street, Anytown, AT3 4PZ

Secondary Address:

Telephone:

Email Address:

ARE THESE DETAILS INCORRECT?

If these contact details are incorrect and you would like to submit some alternative details, please check this box and provide new details in the appropriate boxes above.

[Continue to Review »](#)

You will be prompted to check the current post holder's contact details. If these are correct click CONTINUE TO REVIEW. Otherwise if you wish to make an amendment then tick the box at the bottom of the page and you will be given boxes to complete the new details. Once you have added any amendments in the boxes please click CONTINUE TO REVIEW.

You will then receive a message listing what you have done and asking you to confirm or reset the audit and start again for this role. If you are happy please click SUBMIT YOUR AUDIT FOR THIS POST.

YOUR SUBMISSION

1 Actions 2 Options 3 Review

Thank you for taking the time to audit this post. You have chosen the **no change** action for the post. You have also submitted the following amendments for the current contact's details.

Please review your your decisions before submitting the audit for this post. Once submitted the audit will be moderated before any information is updated. If you would like to start this audit again, please click the reset audit button.

- You are confirming that the post information is currently correct and no changes are required.
- You have provided the following notes/amendments regarding the current post holder.

Name Details William Charles Darcy

Reset audit Submit your audit for this post

You will then 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:

PCC 1 Warden Anytown All Saints (Parish) Darcy, William 01/04/2021 Submitted - No Change Lizzy Darcy View details

2.2 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 "NEW POST HOLDER" instead.

YOUR SUBMISSION

1 Actions 2 Options 3 Review

END POST

Please enter the date this post ends or ended in the box below. This post allows for the option of having a new vacant post created when this post ends. You can optionally request that a vacant post is created by checking the box below.

Post end date **

If you would you like to create a vacant post in place of this post, then please check the box.

If the existing post holder is now deceased, then please check the box.

Continue to Review >

Please enter the end date of the role and tick the relevant box if this post is now vacant. If the previous postholder is deceased please also tick this box and enter the date of death in the box which will appear.

As with the No CHANGE option you will then see a message listing what you have done and asking you to confirm or reset the audit and start again for this role. If you are happy please click SUBMIT YOUR AUDIT FOR THIS POST.

YOUR SUBMISSION

1 Actions 2 Options 3 Review

Thank you for taking the time to audit this post. You have chosen the **end post** action for the post.

Please review your your decisions before submitting the audit for this post. Once submitted the audit will be moderated before any information is updated. If you would like to start this audit again, please click the reset audit button.

- You are confirming that this post is ending or has ended on the following date.

End Date 31/05/2023

Create Post Vacancy? No

Reset audit Submit your audit for this post

Again you will be returned to the summary screen, where this post is now marked as "Submitted - End".

2.3 If you have clicked NEW POST HOLDER

You will be given the option to look for the new post holder amongst the existing contacts in the database.

Enter the details requested which must include an email address. You will be shown a list of possible contacts from which you can select one. (If you do not have an email address for the new postholder then you will need to end the post for the existing postholder and contact the Diocesan Data Manager (contact details below) so that they can add the new postholder). Once you have selected the new postholder from the list you will then be asked to add the date of the change. You also have the option to say if the previous postholder has died at this point. If so please tick the box and add the date of death to the box which will appear. Once this is complete please click CONTINUE TO REVIEW.

As with the No CHANGE option you will then see a message listing what you have done and asking you to confirm or reset the audit and start again for this role. If you are happy please click SUBMIT YOUR AUDIT FOR THIS POST. The summary page will now display "Submitted - Succeed"

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

The status bar at the top of the summary page will show as 100% Completed when this is the case.

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, Diocesan Data 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!