

Completing a Place Audit

A Guide

What is a Place Audit?

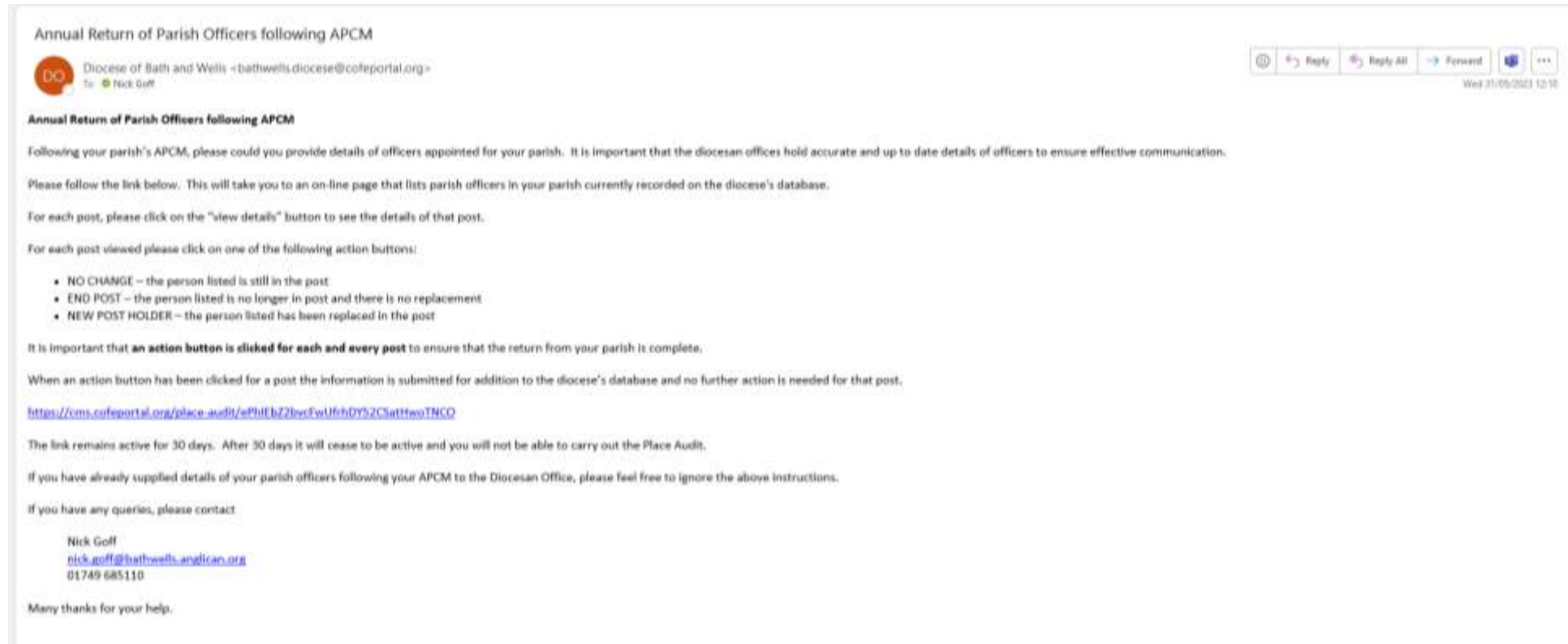
Following your Parish's APCM, you will be asked to provide details of the PCC Officers in your parish.

A Place Audit is a way of recording online the details of officers in your parish. It allows rapid, paper-free updating of the details held on the diocese's database.

It is important that the information held on the database is accurate and up-to-date to ensure effective communication and compliance with legislation.

How to complete a Place Audit

You will receive an e-mail entitled “Annual return of Parish Officers following your APCM”. The email talks you through the process and provides a link. Example below.



Annual Return of Parish Officers following APCM

Diocese of Bath and Wells <bathwells.diocese@cofeportal.org>
To: Nick Goff

Annual Return of Parish Officers following APCM

Following your parish's APCM, please could you provide details of officers appointed for your parish. It is important that the diocesan offices hold accurate and up to date details of officers to ensure effective communication.

Please follow the link below. This will take you to an on-line page that lists parish officers in your parish currently recorded on the diocese's database.

For each post, please click on the "view details" button to see the details of that post.

For each post viewed please click on one of the following action buttons:

- NO CHANGE – the person listed is still in the post
- END POST – the person listed is no longer in post and there is no replacement
- NEW POST HOLDER – the person listed has been replaced in the post

It is important that **an action button is clicked for each and every post** to ensure that the return from your parish is complete.

When an action button has been clicked for a post the information is submitted for addition to the diocese's database and no further action is needed for that post.

<https://cms.cofeportal.org/place-audit/ePhIEbZ2bw3wU6hDY52CSat1fwoTNCQ>

The link remains active for 30 days. After 30 days it will cease to be active and you will not be able to carry out the Place Audit.

If you have already supplied details of your parish officers following your APCM to the Diocesan Office, please feel free to ignore the above instructions.

If you have any queries, please contact

Nick Goff
nick.goff@bathwells.anglican.org
01749 685110

Many thanks for your help.

When you are ready to complete your Place Audit click on the link. Please note that this link remains active for **only 30 days**. After 30 days it will cease to be active and you will not be able to carry out the Place Audit.

Clicking on the link will bring up a summary screen for your parish listing the posts and the individuals currently recorded as holding those posts.

The screenshot shows a web interface for a 'PLACE AUDIT'. At the top, it says 'PLACE AUDIT' in a dark header. Below that, it greets the user 'HELLO NICK,' and provides instructions: '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, PCC Treasurer, Parish Mag Ed, Churchwarden First, Churchwarden Second. Within the following places: Anyparish (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.'

Below the text is a table with the following columns: Role, Place, Occupied by, Start date, End date, Status, and Audited By. There are four rows of data, each with a 'View details' button to its right.

Role	Place	Occupied by	Start date	End date	Status	Audited By
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019		Waiting to be audited	View details
Churchwarden Second	Anyparish (Parish)	Other, Ann	15/09/2021		Waiting to be audited	View details
Churchwarden First	Anyparish (Parish)	Newby, Ann	04/04/2022		Waiting to be audited	View details
Parish Mag Ed	Anyparish (Parish)	Reader, Avid	01/05/2023		Waiting to be audited	View details

At the bottom of the dashboard, there is a section titled 'REQUEST THAT A NEW POST IS CREATED WITHIN THE CMS'. It contains the text: '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.' Below this text is a button labeled 'Request a new post'.

**** For all of the posts listed you will need to select an action to be taken ****

Clicking on the “View details” button for a post will bring up the following screen.

POST DETAILS

Role	Place	Occupied by	Start date	End date
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019	

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.

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.

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).

« Return to post list

Selecting an action for a post

The options are:

- **NO CHANGE** if the person listed is still the postholder.
- **END POST** if the person listed is no longer in post and **no-one has taken their place**.
- **NEW POST HOLDER** if the person listed is no longer in post and **a successor has been appointed**.


NO CHANGE

Click on **NO CHANGE** if the person listed is still the postholder. This will bring up a screen with details of the postholder.

YOUR SUBMISSION

1 Actions **2 Options** 3 Review

CURRENT POST HOLDER DETAILS

Contact Name	Loader Treasure
Primary Address	The Vaults, Threadneedle Street,
Secondary Address	
Telephone	
Email Address	✉ l.treasure@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 »](#)

Continue to Review »

If the details are correct, click on the Continue to Review button

This will bring up a screen to submit the information.

POST DETAILS				
Role	Place	Occupied by	Start date	End date
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019	

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.

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 haven't provided any notes/amendments regarding the current post holder.

[Reset audit](#) [Submit your audit for this post](#)

If the details are not correct, tick the box to submit alternative details. This will bring up a screen allowing new or additional details to be added.

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

CURRENT POST HOLDER DETAILS

Contact Name: Leader Treasure
Please detail any amendments to be made.

Primary Address: The Vaults, Threadneedle Street
Please detail any amendments to be made.

Secondary Address: Please detail any amendments to be made.

Telephone: Please detail any amendments to be made.

Email Address: Please detail any amendments to be made.

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 >](#)

After adding new or additional details click on “Continue to Review”. This will bring up a screen to submit the new information you’ve added.

Submit your audit for this post

Click on the button

This will return you to the screen which lists the posts in your parish to be audited. The submitted post will be greyed out and no further changes to it will be possible.

PLACE AUDIT

HELLO NICK,

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, PCC Treasurer, Parish Mag Ed, Churchwarden First, Churchwarden Second.**

Within the following place: **Anyparish (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, 1 out of 4 audits have been completed.

25% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By	
Churchwarden Second	Anyparish (Parish)	Oter, Ann	15/09/2021		Waiting to be audited		View details
Churchwarden First	Anyparish (Parish)	Newby, Ann	04/04/2022		Waiting to be audited		View details
Parish Mag Ed	Anyparish (Parish)	Reader, Avid	01/05/2023		Waiting to be audited		View details
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019		Submitted - No Change	Nick Goff	View details

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](#)

END POST

Click on **END POST** if the person listed is no longer in post and **no-one has taken their place**. This will bring up a screen to enter details.

POST DETAILS

Role	Place	Occupied by	Start date	End date
Parish Mag Ed	Any parish (Parish)	Reader, Aoid	01/09/2023	

YOUR SUBMISSION

Actions Options Review

END POST
Please enter the date this post ends or ended in the box below.

Post end date

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

[Continue to Review](#)

[Return to post list](#)

Enter the date the post ended.

If the listed post holder is deceased, tick the relevant box then add the date of death.

[Continue to Review >](#)

Click on the button.

This will bring up a screen to submit the information.

POST DETAILS				
Role	Place	Occupied by	Start date	End date
Parish Mag Ed	Anyparish (Parish)	Reader, Aoid	01/05/2023	

YOUR SUBMISSION	
1 Actions	2 Options
<p>Thank you for taking the time to audit this post. You have chosen the end post action for the post.</p> <p>Please review 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.</p> <p>You are confirming that this post is ending or has ended on the following date.</p> <p>End Date: <input type="text" value="30/05/2023"/></p> <p>Reset audit Submit your audit for this post</p>	

[Return to post list](#)

Submit your audit for this post

Click on the button

This will return you to the screen which lists the posts in your parish to be audited. The submitted post will be greyed out and no further changes to it will be possible.

PLACE AUDIT

HELLO NICK,

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, PCC Treasurer, Parish Mag Ed, Churchwarden First, Churchwarden Second.**

Within the following places: **Anyparish (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, 2 out of 4 audits have been completed.

50% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By	
Churchwarden Second	Anyparish (Parish)	Other, Ann	15/09/2021		Waiting to be audited		View details
Churchwarden First	Anyparish (Parish)	Newby, Ann	04/04/2022		Waiting to be audited		View details
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019		Submitted - No Change	Nick Goff	View details
Parish Mag Ed	Anyparish (Parish)	Reader, Avid	01/05/2023		Submitted - End	Nick Goff	View details

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](#)

NEW POST HOLDER

Click on **NEW POST HOLDER** if the person listed is no longer in post and **a successor has been appointed**. This will bring up a screen to enter details of the new postholder.

IMPORTANT NOTE It is only possible to carry out the **NEW POST HOLDER** process if the new postholder has an e-mail address.

If the new postholder does not have an e-mail address, the post must be ended and, once you have the email address, email generalmailbox@bathwells.anglican.org with the new post and postholder details.

Role	Place	Occupied by	Start date	End date
Churchwarden Second	Any parish (Parish)	Other, Ann	15/09/2021	

YOUR SUBMISSION

1 Actions 2 Options 3 Review

SEARCH FOR A NEW POST HOLDER
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.

Forename(s)

Surname

Email address

[Search for an existing contact](#)

[Return to post list](#)

Enter the new postholder's details. Click on "Search for an existing contact". This will bring up a screen showing all the contacts on the database that have similar details to those entered.

PLEASE NOTE: If the new postholder is not on the list, there is a different action which is detailed on page 19 (below).

POST DETAILS

Role	Place	Occupied by	Start date	End date
Churchwarden Second	Anyparish (Parish)	Other, Ann	15/09/2021	

YOUR SUBMISSION

1 Actions 2 Options 3 Review

EXISTING CMS CONTACTS
The following existing contacts, within your diocese, have been found with similar details to those which you have provided.

Forename(s)	Surname	Known as	Email Address	
Kirk	Minder	Kirk	k.mi****@em***.address	Select this contact >

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 a new contact is created >

< Back to previous step

< Return to post list

Select the new postholder from the list. This will bring up a screen to confirm the date they took up the post.

POST DETAILS				
Role	Place	Occupied by	Start date	End date
Churchwarden Second	Any parish (Parish)	Other, Ann	15/09/2021	

YOUR SUBMISSION										
1 Actions	2 Options	3 Review								
<h3>NEW POST HOLDER DETAILS</h3> <table><tr><td>Forename(s)</td><td>Kirk</td></tr><tr><td>Surname</td><td>Minder</td></tr><tr><td>Email address</td><td>k.m****@em***.address</td></tr><tr><td>Date of succession [?]</td><td><input type="text"/></td></tr></table> <p>Enter the date you would like the new post holder to start. This will also be the date the current post holders post ends.</p> <p><input type="checkbox"/> if the existing post holder is now deceased, then please check the box.</p> <p>← Back to previous step Continue to Review →</p>			Forename(s)	Kirk	Surname	Minder	Email address	k.m****@em***.address	Date of succession [?]	<input type="text"/>
Forename(s)	Kirk									
Surname	Minder									
Email address	k.m****@em***.address									
Date of succession [?]	<input type="text"/>									

Enter the date they took up the post. Click on “Continue to Review”. This will bring up a screen to submit the information.

POST DETAILS				
Role	Place	Occupied by	Start date	End date
Churchwarden Second	Any parish (Parish)	Other, Ann	15/09/2021	

YOUR SUBMISSION	
1 Actions	2 Options
3 Review	

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

Please review 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 a new person is now in this post and their details are as follows.

NEW POST HOLDER DETAILS

First Name(s)	Kirk
Surname	Minder
Email Address	k.m****@em****.address
Start Date	31/05/2023

[Reset audit](#) [Submit your audit for this post](#)

[Return to post list](#)

Submit your audit for this post

A screen with details of the new postholder will come up. Click on the button.

POST DETAILS

Role	Place	Occupied by	Start date	End date
Churchwarden Second	Anyarish (Parish)	Other, Ann	15/09/2021	

YOUR SUBMISSION

1 Actions 2 Options 3 Review

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

Please review 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 a new person is now in this post and their details are as follows.

NEW POST HOLDER DETAILS

First Name(s)	Kirk
Surname	Minder
Email Address	k.minder@email.address
Start Date	30/05/2023

[Reset audit](#) [Submit your audit for this post](#)

[Return to post list](#)

This will return you to the screen which lists the posts in your parish to be audited. The submitted post will be greyed out and no further changes to it will be possible.

PLACE AUDIT

HELLO NICK,

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, PCC Treasurer, Parish Mag Ed, Churchwarden First, Churchwarden Second**

Within the following places: **Anyparish (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, 3 out of 4 audits have been completed.

75% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By	
Churchwarden First	Anyparish (Parish)	Newby, Ann	04/04/2022		Waiting to be audited		View details
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019		Submitted - No Change	Nick Goff	View details
Churchwarden Second	Anyparish (Parish)	Other, Ann	15/09/2021		Submitted - Succeed	Nick Goff	View details
Parish Mag Ed	Anyparish (Parish)	Reader, Avid	01/05/2023		Submitted - End	Nick Goff	View details

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](#)

Request a new contact is created »

If the new postholder is not on the list, click on the button. This will bring up a screen to create a new contact.

Role	Place	Occupied by	Start date	End date
Churchwarden Second	Any parish (Parish)	Other, Ann	15/09/2021	

YOUR SUBMISSION

1 Actions 2 Options 3 Review

NEW POST HOLDER DETAILS

Forename(s): Kirk

Surname: Minder

Email address: k.minder@email.address

Date of succession:

Enter the date you would like the new post holder to start. This will also be the date the current post holders post ends.

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

[» Back to previous step](#) [Continue to Review »](#)

After adding new details click on “Continue to Review”. This will bring up a screen to submit the new postholder information.

Add a Post Not Listed

If you'd like to add a new role for your Parish, but it isn't detailed in your lists of roles to review, then click on "Request a new post".

PLACE AUDIT

HELLO NICK,

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, PCC Treasurer, Parish Mag Ed, Churchwarden First, Churchwarden Second**

Within the following places: **Anyparish (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, 3 out of 4 audits have been completed.

75% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By	
Churchwarden First	Anyparish (Parish)	Newby, Ann	04/04/2022		Waiting to be audited		View details
PCC Treasurer	Anyparish (Parish)	Treasure, Loader	02/05/2019		Submitted - No Change	Nick Goff	View details
Churchwarden Second	Anyparish (Parish)	Other, Ann	15/09/2021		Submitted - Succeed	Nick Goff	View details
Parish Mag Ed	Anyparish (Parish)	Reader, Avid	01/05/2023		Submitted - End	Nick Goff	View details

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 bring up a screen to enter the details of the new postholder.

Enter the Post Role and Post Place from the drop-down lists and the date the post started. Enter the name and details of the new postholder. Click on “Search for an existing contact”.

POST DETAILS

Please enter the following details you would like to have on the new post...

Post Role

Post Place

Start Date

POST HOLDER DETAILS

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.

SEARCH FOR A NEW POST HOLDER

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.

Forename(s)

Surname

Email address

[or Submit as vacant post](#)

This will bring up a screen showing all the contacts on the database that have similar details to those entered.

POST DETAILS

Please enter the following details you would like to have on the new post...

Post Role

Post Place

Start Date

POST HOLDER DETAILS

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.

EXISTING CMS CONTACTS

The following existing contacts, within your database, have been found with similar details to those which you have provided.

Forename(s)	Surname	Known as	Email Address	
Testprtn	McTest	Testprtn	rick*****@bath*****.anglican.org	Select this contact

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 a new contact to be created](#)

[+ Back to previous step](#)

[or Submit as vacant post](#)

[+ Return to post list](#)

Select the new postholder from the list. This will bring up a screen to confirm the details of the post. Click on “Submit with post holder”.

The screenshot shows a web interface for creating a new post. It is divided into two main sections: 'POST DETAILS' and 'POST HOLDER DETAILS'.

POST DETAILS

Please enter the following details you would like to have on the new post.

Post Role: PCC Secretary
Post Place: Any parish (Parish)
Start Date: 20/05/2023

POST HOLDER DETAILS

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.

NEW POST HOLDER DETAILS

Forename(s): Testpost
Surname: McTest
Email address: nic*****@par*****.anglican.org

Buttons: + Back to previous step, Submit with post holder

Link: or Submit as vacant post

Footer: + Return to post list, Developed by Amprative, CMS version: 0.1.8726.rds/b6099, Last updated: 2 weeks ago

PLEASE NOTE: If the new postholder is not on the list, there is a different action which is detailed on page 19.

Repeat the process until the status of each post shows as “submitted” and the “View Details” buttons are greyed out.

You do not have to complete the Place Audit in one go. Details are saved as they are submitted. You can resume the Place Audit by clicking on the link in the original e-mail. When all the posts are marked as submitted your Place Audit is complete.

If you have any queries, would like further information or need to notify details of new postholders with no e-mail addresses, please contact:

Bath Deanery:	Jeanette Kenyon Jeanette.kenyon@bathwells.anglican.org
Bath	
Chew Magna	
Locking	
Midsomer Norton	
Portishead	
Taunton Deanery:	
Exmoor	
Quantock	
Sedgemoor	
Somerset South	
Taunton	
Tone	
Wells Deanery:	Sherry Li Sherry.li@bathwells.anglican.org
Axbridge	
Bruton and Cary	
Frome	
Glastonbury	
Ivelchester	
Shepton Mallet	
Yeovil	

Updated 11.06.2024