

PLACE AUDIT - INSTRUCTIONS FOR AUDITORS

Before starting the Place Audit, please ensure you have the details of your parish officers to hand.

Please note, you can pause the audit at any time and return to it later, and any changes you have made will be saved.

The list of posts for which we wish to collect details are:

- PCC & DCC Secretaries (or those who are acting in this role)
- PCC & DCC Treasurers (or those who are acting in this role)
- Parish Safeguarding Officer (or those who are acting in this role)
- Churchwarden 1
- Churchwarden 2
- Deputy Churchwarden
- Assistant Churchwarden
- Electoral Roll Officer
- Deanery Synod Lay Representative
- PCC Lay Vice Chair
- Planned Giving Officer

We will send you an email from the Diocese of Truro which contains a link to your place audit. When you click on the link you will be taken to a screen that looks like the one pictured below. The names listed will be of your parish officers as currently recorded on our diocesan database (see example 'Screenshot 1' below).

PLEASE NOTE: if any of these posts listed above do not appear on your audit, either as filled or vacant, then please email us at APCM@trurodiocese.org.uk to let us know which post we need to add and, if not vacant, who the officer is.

Screenshot 1

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

PLACE AUDIT

HELLO LESLEY,

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: **Churchwarden 1. Churchwarden 2.**

Within the following places: **Example Name of Parish (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 2 audits have been completed.

0% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
Churchwarden 1	Example Name of Parish (Parish)	Doe, Jane	23/11/2020		Waiting to be audited	View details
Churchwarden 2	Example Name of Parish (Parish)	VACANT	23/11/2020		Waiting to be audited	View details

Developed by Worthers

CMS version: 0.1.6998.re780124
Last updated: 2 hours ago

There is a **status column** beside each parish officer that indicates the audit status for that contact. Once the contact has been audited, the status section will be updated to indicate that the process for that contact has been completed.

Each parish officer will need to be individually audited.

To do so, click on the **‘View details’** button on the right-hand side of the status column. You will then see a screen that looks similar to the one below:

Screenshot 2

The screenshot displays the 'CONTACT MANAGEMENT SYSTEM' interface for 'THE CHURCH OF ENGLAND'. The page title is 'Place Audit' for 'Lesley Fusher, APCM test role 3 @ Truro (Diocese)'. The 'POST DETAILS' section contains a table with the following data:

Role	Place	Occupied by	Start date	End date
APCM test role 3	Example Name of Parish (Parish)	Doe, Jane	31/03/2023	02/04/2023

The 'YOUR SUBMISSION' section is divided into three steps: 1. Actions, 2. Options, and 3. Review. Under 'Options', there are four choices:

- 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.
- EXTEND POST**: The post currently has an end date specified. If you would like to extend this post then you can do by either adding 12 months to the current end date or you may select a specific date to extend the post until.

You will have three (possibly four) choices as listed below:

- **No Change** (to indicate that this contact is still in post)
- **End Post** (if the contact is no longer in post AND there is no replacement)
- **New Post Holder** (if someone new has taken on this role)
- **Extend Post** (this option is displayed *only if a post has an end date*)

NO CHANGE

Screenshot 3 on the next page shows what you will see if **‘No Change’** is chosen.

You will be asked to check the contact's details and will be able to submit any changes by choosing the tick box below the **‘ARE THESE DETAILS INCORRECT’** message. Then click on **‘Continue to Review’**.

Screenshot 3

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

Place Audit: Jane Doe, @ Example Name of Parish (Parish)

POST DETAILS

Role	Place	Occupied by	Start date	End date
Churchwarden 1	Example Name of Parish (Parish)	Doe, Jane	23/11/2020	

YOUR SUBMISSION

1 Actions 2 Options 3 Review

CURRENT POST HOLDER DETAILS

Contact Name: Jane Doe

Primary Address: 1 Anywhere Road, Hilltop Valley, Tresland, TR1 1AB

Secondary Address:

Telephone: 01209 123456

Email Address: Jane.doe@emailaddress.co.uk

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 >](#)

When 'Continue to Review' is chosen you will be asked to review your decisions before submitting the audit (see Screenshot 4 below). If you wish to start the audit for this contact again, choose 'Reset the audit'. If you are happy with your decisions, choose 'Submit your audit for this post'.

Screenshot 4

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

APCM test role 3 Truro (Diocese) Fusher, Lesley 05/02/2021

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](#)

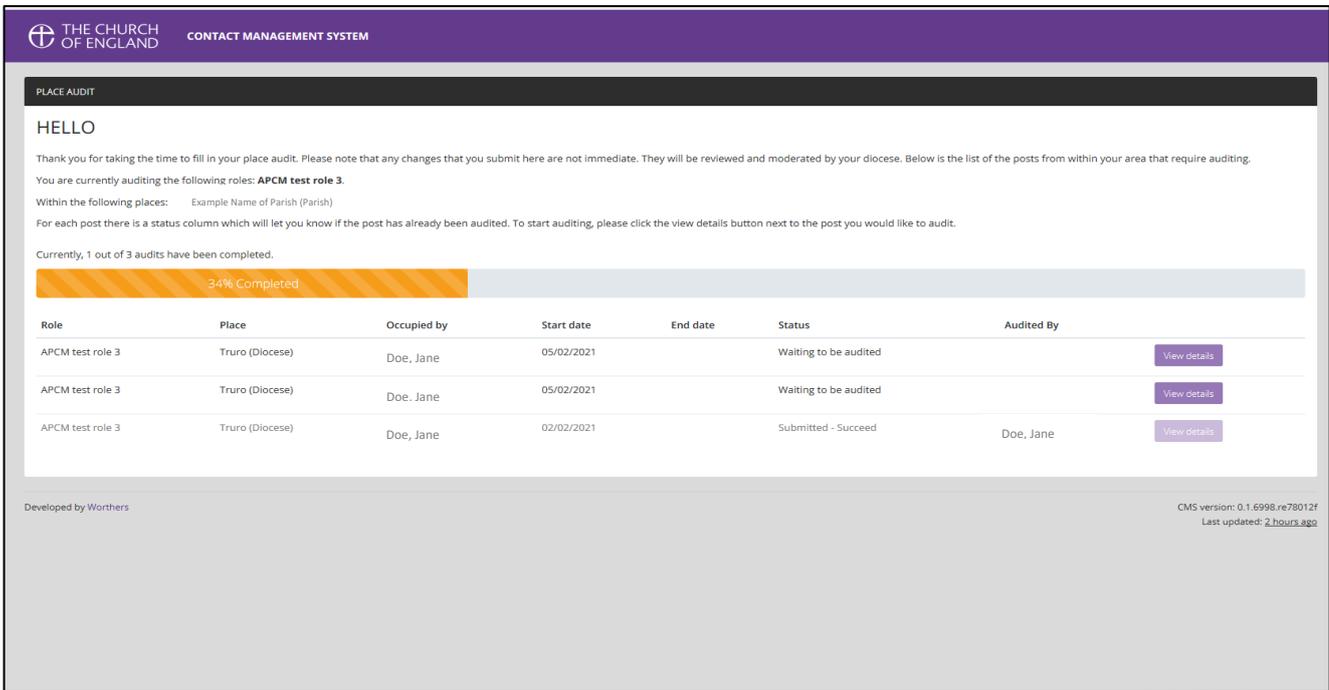
« Return to post list

Developed by Worthers CMS version: 0.1.7005.r7028262 Last updated: 6.days.8gR

14:36

Once the audit for this contact has been submitted you will be returned automatically to the home page of the audit. A bar at the top of the page will show the percentage of the audit that has been completed. See **Screenshot 5** below:

Screenshot 5

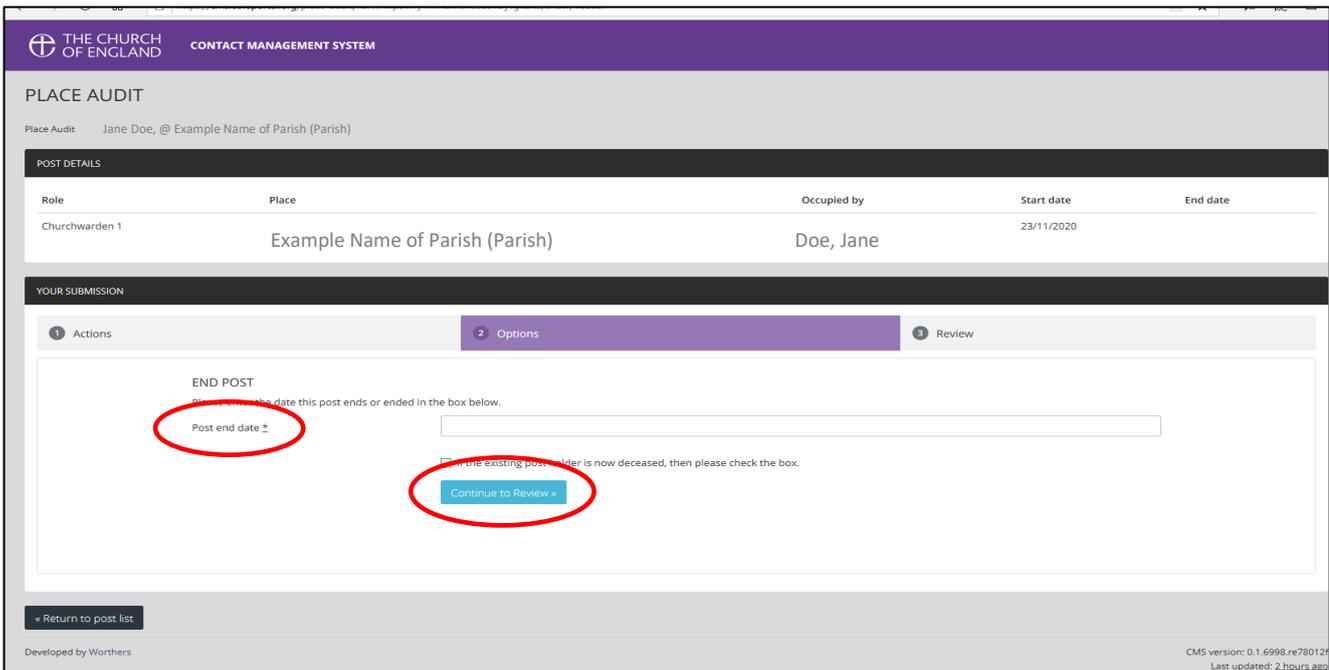


END POST

Screenshot 6 below shows what you will see if 'End Post' is chosen.

You will be able asked to enter the date the post ended (or will end) and will be given the opportunity to indicate if the contact is deceased.

Screenshot 6



When 'Continue to Review' is chosen you will be asked to review your decisions before submitting the audit. See Screenshot 4.

Once the audit for this contact has been submitted you will be automatically returned to the home page of the audit. A bar at the top of the page will show the percentage of the audit that has been completed. See Screenshot 5.

NEW POST HOLDER

Screenshot 7 below shows what you will see if 'New Post Holder' is chosen.

You will be asked to enter the name and email address of the contact who has taken on the post and then choose 'Search for existing contact'.

Please note: if the new post holder does not have an email address, please contact us direct with name and contact details of the new post holder by sending an email to info@trurodiocese.org.uk. Church House staff will then make the update.

Screenshot 7

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

PLACE AUDIT

Place Audit Jane Doe, @ Example Name of Parish (Parish)

Role	Place	Occupied by	Start date	End date
Churchwarden 1	Example Name of Parish (Parish)	Doe, Jane	23/11/2020	

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

Developed by Worthers CMS version: 0.1.6998.re78012 Last updated: 2 hours ago

You will then be able to either (i) choose an existing contact (if one has been found) OR (ii) request that a new contact is created. See Screenshot 8 on the next page:

Screenshot 8

Role	Place	Occupied by	Start date	End date
APCM test role 3	Example Name of Parish (Parish)	Doe, Jane	05/02/2021	

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.
Any contacts exactly matching your criteria, will be highlighted green.

Forename(s)	Surname	Known as	Email Address	
Jane Ann	Doe	Jane	Jane.doe@emailaddress.co.uk	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

You will then be asked to add a post start date and be given the option to either return to the previous step of this audit or continue to review. See screenshot 9 below.

Screenshot 9

CMS | Place Audits - Admin CMS | Show - Place Audit

https://cms.cofeportal.org/place-audit/jg0lbZIYDYpGb6WY4cJslsIDW112rSLK/show/163970

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

1 Actions 2 Options 3 Review

NEW POST HOLDER DETAILS

Forename(s) Jane Ann

Surname Doe

Email address Jane.doe@emailaddress.co.uk

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 »

« Return to post list

Developed by Worthers

CMS version: 0.1.7005.r7028262
Last updated: 6 days

14:54
18/02/20

You will then see a screen that looks like the one below in **Screenshot 10** and you will be given the choice to either (i) reset the audit, or (ii) submit the audit for the post.

Screenshot 10

The screenshot shows the 'CONTACT MANAGEMENT SYSTEM' interface for 'THE CHURCH OF ENGLAND'. At the top, a table lists post details: Role (APCM test role 3), Place (Example Name of Parish (Parish)), Occupied by (Doe, Jane), Start date (02/02/2021), and End date. Below this is the 'YOUR SUBMISSION' section with three steps: 1. Actions, 2. Options, and 3. Review (highlighted in purple). A blue message box says: 'Thank you for taking the time to audit this post. You have chosen the **succeed post** action.' Below this, instructions state: '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.' A note follows: 'You are confirming that a new person is now in this post and their details are as follows.' Under 'NEW POST HOLDER DETAILS', fields are shown: First Name(s) Jane, Surname Doe, Email Address Jane.doe@emailaddress.co.uk, and Start Date 02/02/2021. At the bottom of this section, two buttons are circled in red: 'Reset audit' and 'Submit your audit for this post'. A 'Return to post list' button is at the bottom left. Footer text includes 'Developed by Worthers' and 'CMS version: 0.1.6998.re78012f Last updated: 2 hours ago'.

Once the audit for this contact has been submitted you will automatically return to the home page of the audit. A bar at the top of the page will show the percentage of the audit that has been completed. See **Screenshot 5**.

EXTEND POST

Please note: this option is available only when the post that is being audited has an end date.

Screenshot 11 below shows what you will see if 'Extend post' is chosen.

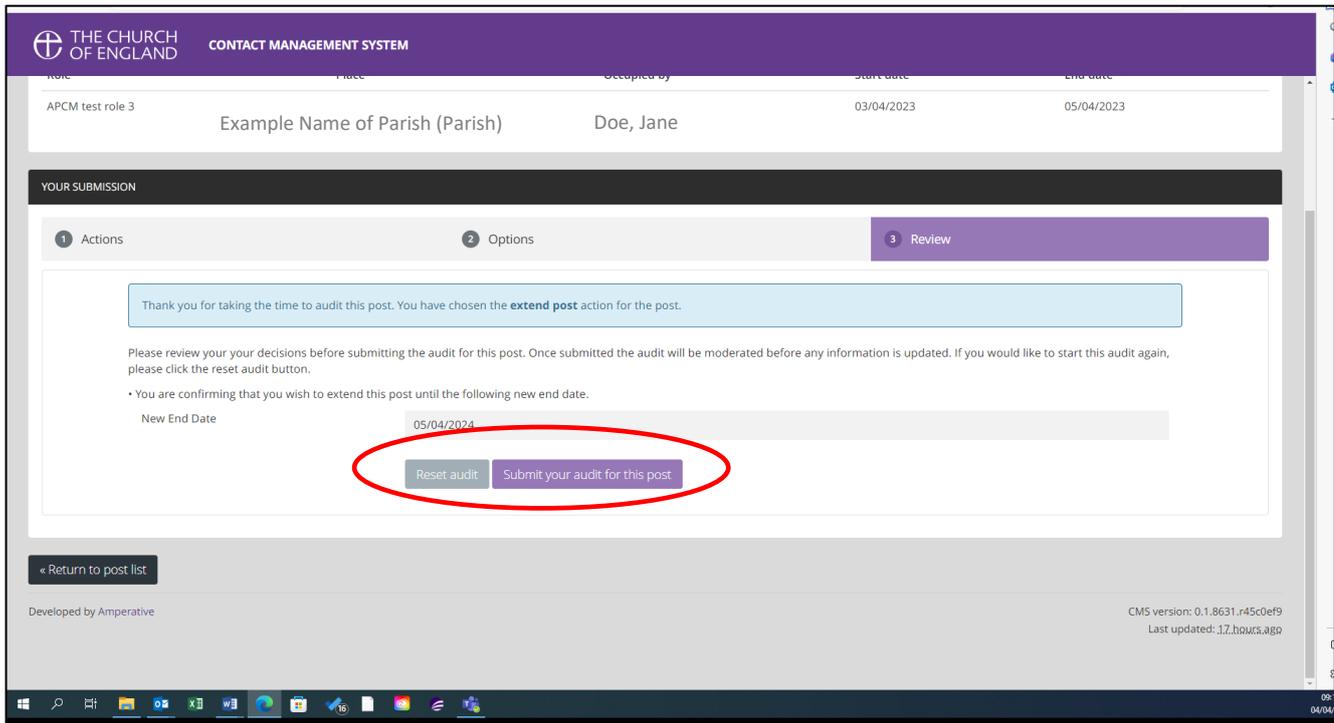
You will be asked to enter a *new* end date for the post and be given the option to either return to the post list, or continue to review.

Screenshot 11

The screenshot shows the 'CONTACT MANAGEMENT SYSTEM' interface for 'THE CHURCH OF ENGLAND'. At the top, a table lists post details: Role (APCM Test Role 2), Place (Example Name of Parish (Parish)), Occupied by (Doe, Jane), Start date (03/04/2023), and End date (04/04/2023). Below this is the 'YOUR SUBMISSION' section with three steps: 1. Actions, 2. Options (highlighted in purple), and 3. Review. A blue message box says: 'You can extend this post by selecting a new end date. By default a date of 12 months from today has been selected, but you may enter a different date if required.' Below this, a text input field is labeled 'Enter new end date :..'. To the right of the input field is a 'Continue to Review' button, which is circled in red. A 'Return to post list' button is at the bottom left. Footer text includes 'Developed by Amperative' and 'CMS version: 0.1.8631.r45c0ef9 Last updated: 1.7.hours.ago'.

You will then see a screen that looks like **Screenshot 12** below; you will be asked to review your decisions and either (i) submit your audit for the post OR (ii) reset the audit to start again.

Screenshot 12



COMPLETING THE AUDIT

Once you have fully completed the Place Audit, the bar at the top of the home page will indicate 100%.

See Screenshot 13 below:

Screenshot 13

