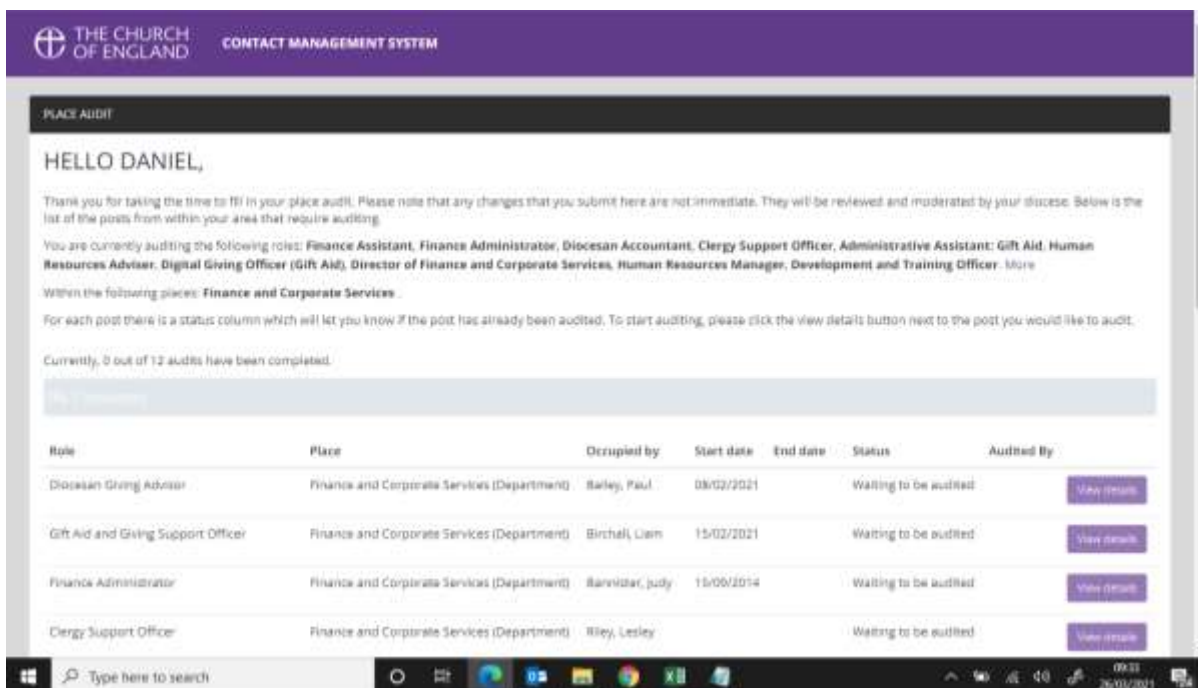


Checking we have the right people in the right roles for your parish

As a Parish Data Co-ordinator, you will receive an email from manchester.diocese@cofeportal.org containing a link which will enable you to carry out a 'Place Audit' of certain roles within your parish.

The link will take you to a website which will show you the people within your parish that we currently have recorded on the diocesan Contact Management System in the roles listed in the opening paragraphs of the web page (see Fig 1).

Fig 1



THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

PLACE AUDIT

HELLO DANIEL,

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: **Finance Assistant, Finance Administrator, Diocesan Accountant, Clergy Support Officer, Administrative Assistant: Gift Aid, Human Resources Adviser, Digital Giving Officer (Gift Aid), Director of Finance and Corporate Services, Human Resources Manager, Development and Training Officer.** [More](#)

Within the following places: **Finance and Corporate Services.**

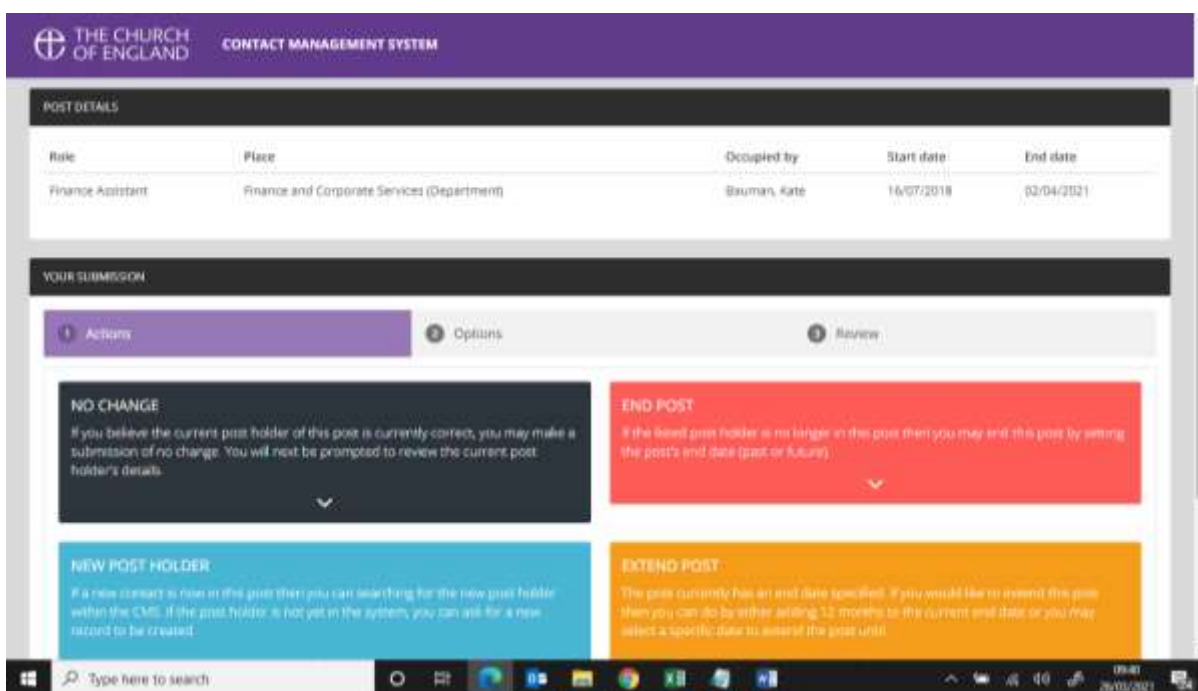
For each post there is a status column which will let you know if the post has already been audited. To start auditing, please click the view details button next to the post you would like to audit.

Currently, 0 out of 12 audits have been completed.

Role	Place	Occupied by	Start date	End date	Status	Audited By
Diocesan Giving Advisor	Finance and Corporate Services (Department)	Bailey, Paul	08/02/2021		Waiting to be audited	View details
Gift Aid and Giving Support Officer	Finance and Corporate Services (Department)	Birchall, Liam	15/02/2021		Waiting to be audited	View details
Finance Administrator	Finance and Corporate Services (Department)	Barnister, Judy	15/05/2014		Waiting to be audited	View details
Clergy Support Officer	Finance and Corporate Services (Department)	Wiley, Lesley			Waiting to be audited	View details

Simply click on the View details button next to the role you want to audit. This will then provide you with a number of options (see Fig 2)

Fig 2



THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

POST DETAILS

Role	Place	Occupied by	Start date	End date
Finance Assistant	Finance and Corporate Services (Department)	Bauman, Kate	16/07/2018	02/04/2021

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 the 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 so by either adding 11 months to the current end date or you may select a specific date to extend the post until.

Option 1 – NO CHANGE

If you are happy that the role you have selected is filled by the correct person, then simply click the **NO CHANGE** button in black. This will then show you their contact details. If you want to change any of the contact details, check the tick box under ARE THESE DETAILS CORRECT and provide the new details.

Once you're happy that the contact details are correct, click the **Continue to Review** button (see Fig 3).

Fig 3

The screenshot displays the 'CONTACT MANAGEMENT SYSTEM' interface for 'THE CHURCH OF ENGLAND'. It features a navigation bar with 'Actions', 'Options', and 'Review' tabs. The 'Options' tab is active, showing 'CURRENT POST HOLDER DETAILS' for 'Kate Bauman'. The details include: Contact Name (Kate Bauman), Primary Address (Finance and Corporate Services, Church House, 90 Deansgate, M3 2GR), Secondary Address, Telephone (0161 828 1404), and Email Address (katebauman@manchester.anglican.org). Below the details is a section titled 'ARE THESE DETAILS INCORRECT?' with a checkbox and a 'Continue to Review' button.

You will finally be asked to confirm your decision by clicking the **Submit your audit for this post** button (see Fig 4).

Fig 4

The screenshot shows the 'YOUR SUBMISSION' screen in the 'CONTACT MANAGEMENT SYSTEM'. It features a navigation bar with 'Actions', 'Options', and 'Review' tabs. A blue message box states: 'Thank you for taking the time to audit this post. You have chosen the no change action.' Below this, a paragraph reads: '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.' Two bullet points follow: '• You are confirming that the post information is currently correct and no changes are required.' and '• You haven't provided any notes/amendments regarding the current post holder.' At the bottom, there are two buttons: 'Reset audit' and 'Submit your audit for this post'. A 'Return to post list' button is also visible. The footer includes 'Developed by Wothers' and 'CMS version: 0.1.7084-2289031 Last updated: 1.28'.

Option 2 – END POST

If the role is filled by someone who is no longer in post and no one else has taken on the role, click on the **END POST** button in red (see Fig 2). You will then be asked to provide the date that the role was vacated (best guess is fine) then click the **Continue to Review** button (see Fig 5).

Fig 5

The screenshot shows the 'END POST' form in the Church of England Contact Management System. The form is titled 'END POST' and asks the user to enter the date the post ends or ended. The 'Post end date' field contains '31/05/2021'. There is a checkbox labeled 'if the existing post holder is now deceased, then please check the box.' which is currently unchecked. A blue button labeled 'Continue to Review >' is visible. The form is part of a 'YOUR SUBMISSION' section with tabs for 'Actions', 'Options', and 'Review'. The 'Review' tab is active. At the bottom, there is a 'Return to post list' button and a footer with 'Developed by Worthers' and 'CMS version: 0.1.7054 (21/03/21) Last updated: 1.02'.

You will finally be asked to confirm your decision and the date entered by clicking the **Submit your audit for this post** button (see Fig 6).

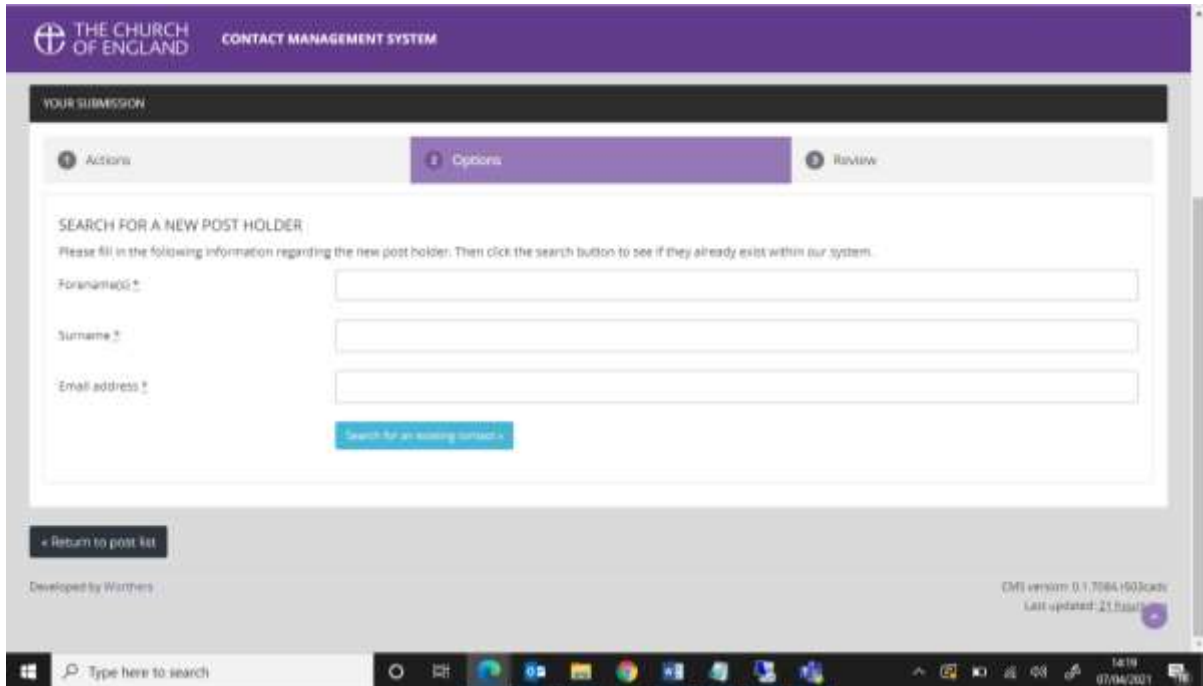
Fig 6

The screenshot shows the 'Submit your audit for this post' form in the Church of England Contact Management System. The form is titled 'Submit your audit for this post' and contains a thank you message: 'Thank you for taking the time to audit this post. You have chosen the end post action.' Below this, there is a paragraph of text: '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.' and a bullet point: '• You are confirming that this post is ending or has ended on the following date.' The 'End Date' field contains '31/05/2021'. There are two buttons: 'Reset audit' and 'Submit your audit for this post'. The form is part of a 'YOUR SUBMISSION' section with tabs for 'Actions', 'Options', and 'Review'. The 'Review' tab is active. At the bottom, there is a 'Return to post list' button and a footer with 'Developed by Worthers' and 'CMS version: 0.1.7054 (21/03/21) Last updated: 1.02'.

Option 3 – NEW POST HOLDER

If the role is now occupied by someone else, click on the **NEW POST HOLDER** button in blue (see Fig 2). You can then check if that person's details are already on the Contact Management System by entering their forename, surname and email address and clicking the **Search for an existing contact** button (see Fig 7).

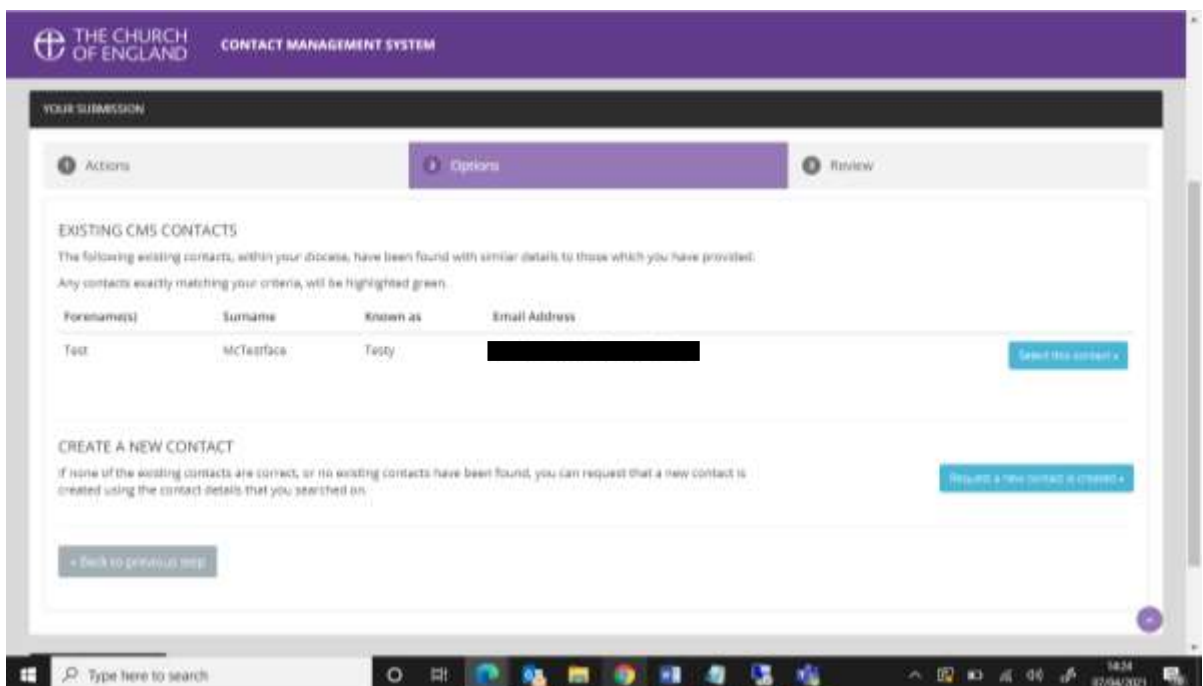
Fig 7



If there are existing contacts that match the information you have provided, they will be displayed in the EXISTING CMS CONTACTS section. If the person who has taken on the role is shown, click on the **Select this contact** button next to their name (see Fig 8).

If no existing contacts are found or the person who has taken on the role is not among the suggestions, click the **Request a new contact is created** button in the CREATE A NEW CONTACT section (see Fig 8).

Fig 8



In either case, you will then be asked to provide the date that the new post holder started in the role (best guess is fine) then click the **Continue to Review** button (see Fig 9).

Fig 9

The screenshot shows the 'Options' step of a 'YOUR SUBMISSION' process. At the top, there are three tabs: 'Actions', 'Options' (selected), and 'Review'. Below the tabs, the 'NEW POST HOLDER DETAILS' section contains the following fields:

- Forename(s): Test
- Surname: McTestface
- Email address: [Redacted]
- Date of accession: [Empty field]

Below the date field, there is a note: "Enter the date you would like the new post holder to start. This will also be the date the current post holders post ends." and a checkbox: "If the existing post holder is now deceased, then please check the box." At the bottom of the form, there are two buttons: "Back to previous step" and "Continue to Review".

You will finally be asked to confirm your decision and the details entered by clicking the **Submit your audit for this post** button (see Fig 10).

Fig 10

The screenshot shows the 'Review' step of the 'YOUR SUBMISSION' process. At the top, there are three tabs: 'Actions', 'Options', and 'Review' (selected). A blue message box at the top reads: "Thank you for being the first to audit this post. You have chosen the succeed post action." Below this, there is a paragraph: "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." and a bullet point: "You are confirming that a new person is now in this post and their details are as follows." Below this, the 'NEW POST HOLDER DETAILS' section contains the following fields:

- First Name(s): Test
- Surname: McTestface
- Email Address: [Redacted]
- Start Date: 01/04/2021

At the bottom of the form, there are two buttons: "Reset audit" and "Submit your audit for the post".

Option 4 – EXTEND POST

If there is already an end date against the role and you wish to extend the post holder's tenure, click the **EXTEND POST** button in orange – this will only be visible if an end date is already in place (see Fig 2). Simply enter a new end date and click the **Continue to Review** button (see Fig 11).

Fig 11

The screenshot shows the 'CONTACT MANAGEMENT SYSTEM' interface for 'THE CHURCH OF ENGLAND'. The page is titled 'YOUR SUBMISSION' and has three steps: 1. Actions, 2. Options (highlighted in purple), and 3. Review. A blue message box states: '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 is a text input field labeled 'Enter new end date:' with a date picker icon. A blue button labeled 'Continue to Review' is positioned below the input field. At the bottom left, there is a dark button labeled 'Return to post list'. The footer includes 'Developed by Worships' and 'CMS version: 0.1.7084/802baki Last updated: 22.10.2021'. The Windows taskbar is visible at the bottom.

You will finally be asked to confirm your decision and the date entered by clicking the **Submit your audit for this post** button (see Fig 12).

Fig 12

The screenshot shows the 'CONTACT MANAGEMENT SYSTEM' interface for 'THE CHURCH OF ENGLAND'. The page is titled 'YOUR SUBMISSION' and has three steps: 1. Actions, 2. Options, and 3. Review (highlighted in purple). A blue message box states: 'Thank you for taking the time to audit this post. You have chosen the extend post action.' Below this is a paragraph: '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 bullet point states: 'You are confirming that you wish to extend this post until the following new end date'. Below this is a text input field labeled 'New End Date' with the date '31/07/2022' entered. Two buttons are present: a grey button labeled 'Reset audit' and a purple button labeled 'Submit your audit for this post'. At the bottom left, there is a dark button labeled 'Return to post list'. The footer includes 'Developed by Worships' and 'CMS version: 0.1.7084/802baki Last updated: 22.10.2021'. The Windows taskbar is visible at the bottom.

Option 5 – REQUEST A NEW POST IS CREATED WITHIN THE CMS

If there is a post missing from the list (see Fig 1), you can scroll to the bottom of the list and click the **Request a new post** button in the REQUEST A NEW POST IS CREATED WITHIN THE CMS section (see Fig 13).

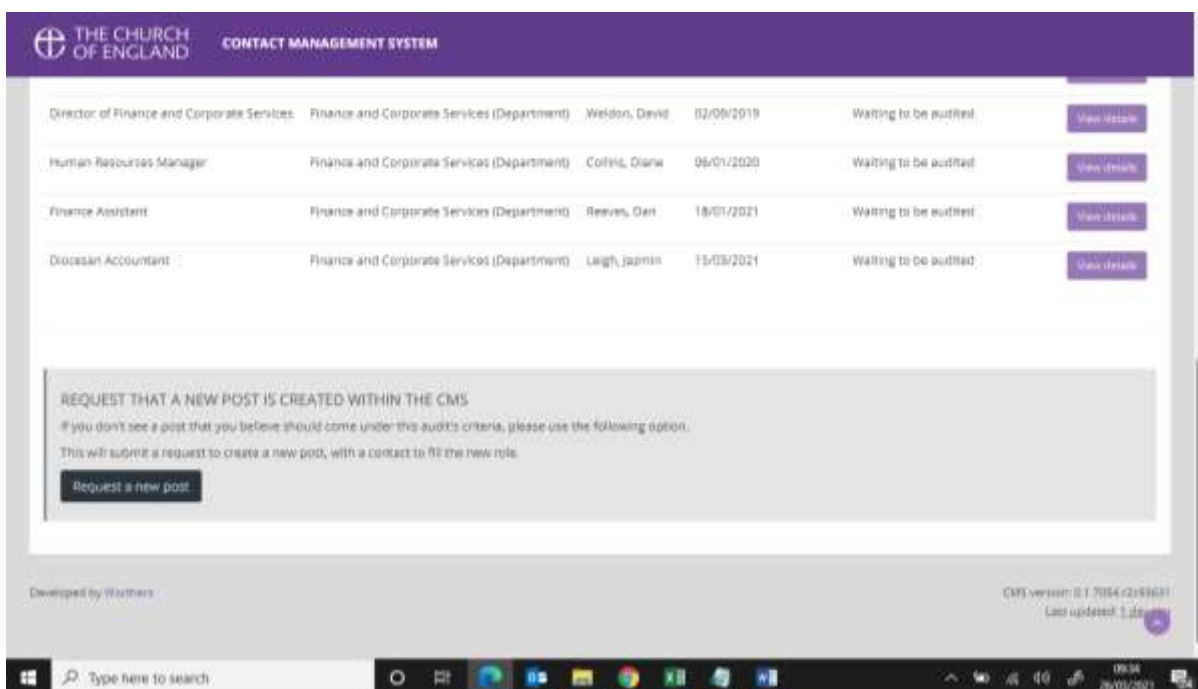


Fig 13

You will then be asked to select the role you wish to add, the place it is to be added to (you will only see your parish unless you are Parish Data Co-ordinator for multiple parishes) and the date the role started (see Fig 14 – POST DETAILS section).

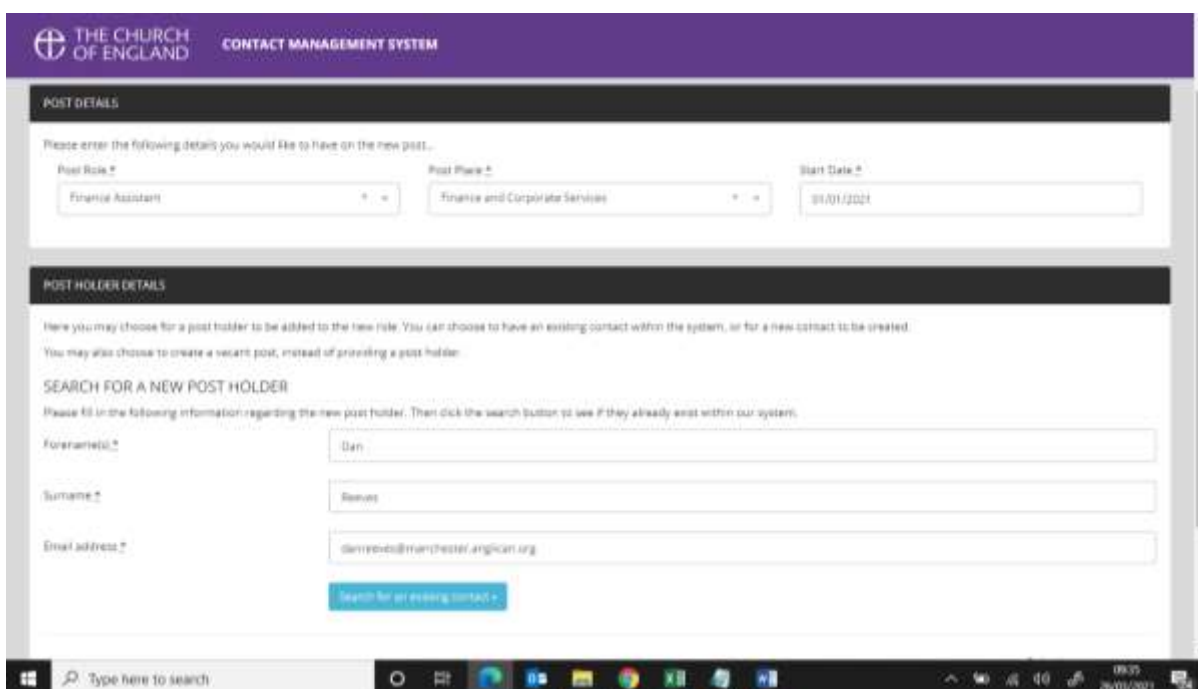
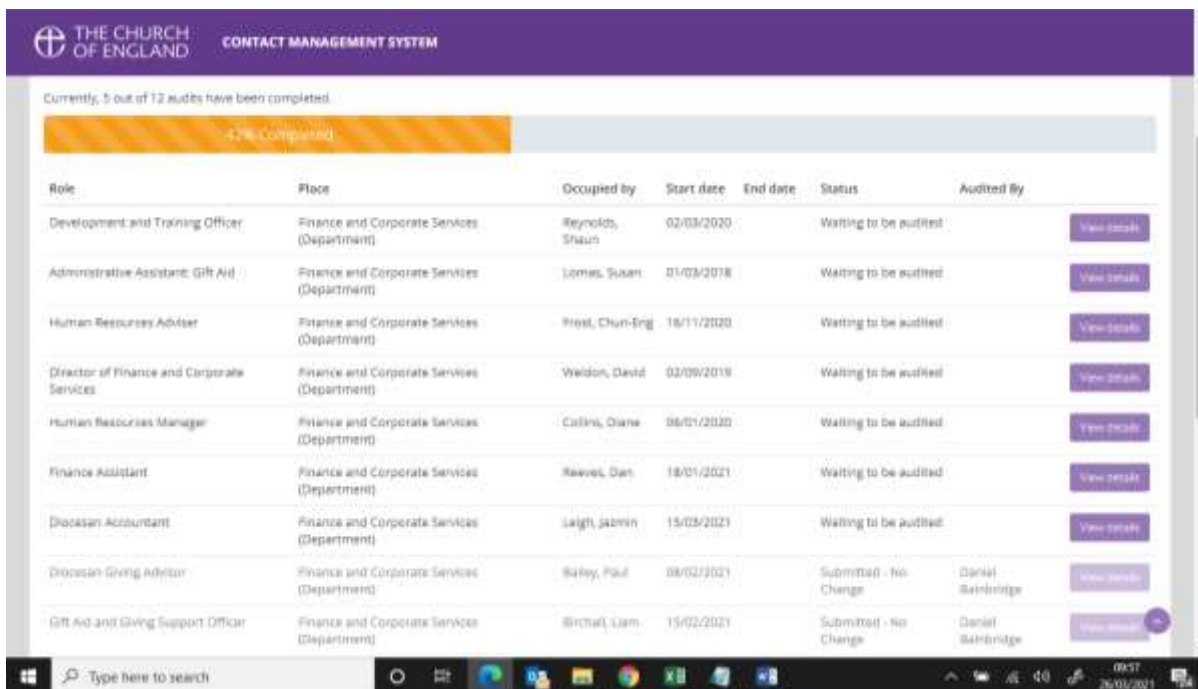


Fig 14

You will then need to fill in the POST HOLDER DETAILS section, which is the same process as **Option 3 – NEW POST HOLDER** (see above).

Checking your progress

You do not have to complete the exercise all in one go – the link you receive can be clicked on as often as you need and it will return you to the point you left off. As you complete each role's audit, its status will be updated in the Status column and the role will be greyed out. The progress bar will also update (see Fig 15).



Currently, 5 out of 12 audits have been completed.

42% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
Development and Training Officer	Finance and Corporate Services (Department)	Reynolds, Shaun	02/03/2020		Waiting to be audited	View details
Administrative Assistant: Gift Aid	Finance and Corporate Services (Department)	Lomas, Susan	01/03/2018		Waiting to be audited	View details
Human Resources Adviser	Finance and Corporate Services (Department)	Frost, Chun-Eng	18/11/2020		Waiting to be audited	View details
Director of Finance and Corporate Services	Finance and Corporate Services (Department)	Weldon, David	02/09/2019		Waiting to be audited	View details
Human Resources Manager	Finance and Corporate Services (Department)	Collins, Diane	06/01/2020		Waiting to be audited	View details
Finance Assistant	Finance and Corporate Services (Department)	Rawes, Dan	18/01/2021		Waiting to be audited	View details
Diocesan Accountant	Finance and Corporate Services (Department)	Laligh, Jarrin	15/05/2021		Waiting to be audited	View details
Diocesan Giving Adviser	Finance and Corporate Services (Department)	Bailey, Paul	08/02/2021		Submitted - No Change	Daniel Sainbridge View details
Gift Aid and Giving Support Officer	Finance and Corporate Services (Department)	Birchall, Liam	15/02/2021		Submitted - No Change	Daniel Sainbridge View details

Fig 15

Once all roles have been audited (all roles are greyed out and the progress bar shows 100% Completed), the exercise is done. The changes you have provided will then be moderated by the Contact Management System administrator at Church House and the system will be updated.