

Completing a Place Audit

A Guide for PCC Secretaries

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 message entitled "Annual return of Parish Officers following an APCM". The message gives an overview of the process.

There will be a link in the message.

From: Diocese of Bath and Wells <bathwells.diocese@cofeportal.org>
To: Nick Goff
Cc:
Subject: Annual Return of Parish Officers following APCM Sent: Wed 13/03/2019

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
- Succeed post – 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.

Please note that if you add additional comments, such as amended details of start dates, you still need to click on one of the action buttons.

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/nfYiVWXXn6RNWaqUAtUXwGfxwneL6GHx>

If you have any queries, please contact
Chris Roome
chris.roome@bathwells.anglican.org
01749 685130
or
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 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 the parish listing the posts in your parish and the individuals currently recorded as holding those posts.

Role	Place	Occupied by	Start date	End date	Status	
Churchwarden First	Greinton: St Michael and All Angels (Church)	VACANT	29 June 2017		Waiting to be audited	View details
Churchwarden Second	Greinton: St Michael and All Angels (Church)	Testgoff, Testy	13 March 2019		Waiting to be audited	View details
PCC Secretary	Greinton (Parish)	Testgoff, Testy	13 March 2019		Waiting to be audited	View details

If a post is marked VACANT, it means that there is no record of a postholder for that post in the database.

For all of the posts listed you will need to:

- check the postholder’s details
- indicate an action to be taken.

Checking a postholder’s details

Click on the “View details” box.

A screen containing details of the postholder will open up.

POST DETAILS

Role	Churchwarden Second
Place	Greinton: St Michael and All Angels (Church)
Occupied by	Testgoff, Testy
Start Date	13 March 2019
End Date	

CONTACT DETAILS

Contact name	Testgoff, Testy
Primary Address	3 Acacia Avenue, Sometown,
Secondary Address	
Telephone	
Email Address	nick****@bathwells.anglican.org

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 its 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](#)

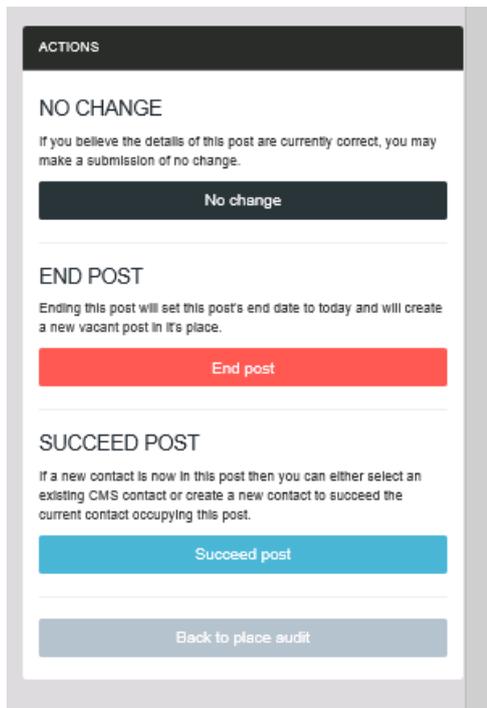
[Back to place audit](#)

Check all the contact details listed for the postholder.

If any of the contact details are incorrect, give the correct details in the box at the bottom of the page and click the “Save” button. Please note that any details entered will be lost if the “Save” button is not clicked.

Indicating an action for a post

Once you have checked the postholder’s contact details **you must click on ONE of the action buttons to finish the audit of that post.**



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 its 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

Click on NO CHANGE if the person listed is still the postholder.

Click on END POST if the person listed is no longer in post and **no-one has taken their place.**

Click on SUCCEED POST if the person listed is no longer in post and **a successor has been appointed.**

IMPORTANT NOTE It is only possible to carry out the SUCCEED POST 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 details of the new postholder notified to the Diocesan Office Secretariat separately (details below).

If you clicked on NO CHANGE

Confirm in the pop-up box that no change is needed.

You will be returned to the summary screen for the parish and the post you have just submitted will be marked “Submitted, No change”.

Churchwarden Second Greinton: St Michael and All Angels (Church) Testgoff, Testy 13 March 2019 Submitted - No Change [View details](#)

If you clicked on END POST

END POST should only be selected if there is no-one taking on the role after the existing postholder has left.

If you have clicked on END POST and someone is taking over the post, please click on the grey “Back to process post” box to return to the previous screen and click on SUCCEED POST.

The END POST screen will come up.

END POST		ACTIONS	
<p>You can end this post today or you can set a date in the future to end this post. When you end this post you can optional create a new vacant post in it's place.</p>		<p>Enter new end date *</p> <input type="text" value="14/03/2019"/>	
<p>Current post details</p>		<p><input type="checkbox"/> If you would you like to create a vacant post in place of this post, then please check the box.</p>	
Role	Churchwarden Second	<p>End post and submit for moderation</p> <p>Back to process post</p>	
Place	Greinton: St Michael and All Angels (Church)		
Occupied by	Testgoff, Testy		
Start Date	13 March 2019		
End Date			

In the ACTIONS box enter the date at which the post ends (this can be in the past or the future) if it is not the same as the automatically generated date.

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

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

Click on the red “End post and submit for moderation” box.

You will be returned to the summary screen for the parish and the post you have just submitted will be marked “Submitted – Post Ended”.

Churchwarden Second Greinton: St Michael and All Angels (Church) Testgoff, Testy 13 March 2019 Submitted - Post Ended [View details](#)

If you clicked on SUCCEED POST

The SUCCEED POST screen will come up.

SUCCEED POST		ACTIONS	
<p>If you would like succeed the contact occupying this post with another contact then you can either search for a contact within already within the CMS or add a new contact.</p>		<p>Date of succession</p>	
<p>Current post details</p>		<p>Enter the date you would like this post to be succeeded *</p> <input type="text" value="14/03/2019"/>	
Role	PCC Secretary	<p>Contact details</p>	
Place	Greinton (Parish)	<p>Forename</p> <input type="text" value="chris"/>	
Occupied by	Testgoff, Testy	<p>Surname</p> <input type="text" value="roome"/>	
Start Date	13 March 2019	<p>Email address *</p> <input type="text" value="chris.roome@bathwells.anglican.org"/>	
End Date		<p>Search for contact</p>	
<p>Current contact details</p>		<p>Back to process post</p>	
Contact name	Testgoff, Testy		
Primary Address	3 Acacia Avenue, Sometown,		

In the ACTIONS box enter the date at which the new postholder takes over (this can be in the past or the future) if it is not the same as the automatically generated date.

Fill in the contact details of the new postholder.

It is only possible to carry out the SUCCEED POST 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 details of the new postholder notified to the Diocesan Office Secretariat separately (details below).

Click on the blue “Search for contact” button. This will check whether the new postholder is already in the database.

The following screen will come up.

SUCCEED POST

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

Surname	Forenames	Known as	Email Address
Roome	Christopher	Chris	Chris.Roome@bathwells.anglican.org

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 postholder is already in the database they will be listed. Click on the purple “Select and submit for moderation” button next to their name.

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

Surname	Forenames	Known as	Email Address
Roome	Christopher	Chris	Chris.Roome@bathwells.anglican.org

Select and submit for moderation

If the new postholder is not listed, click on the green “Request the creation of a new contact and submit for moderation” button. Confirm in the pop-up box that you wish to create a new 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 the creation of a new contact and submit for moderation

You will be returned to the summary screen for the parish and the post you have just submitted will be marked “Submitted – Post Succeeded”.

PCC Secretary Greinton (Parish) Testgoff, Testy 13 March 2019 Submitted - Post Succeeded View details

Repeat the process of checking postholders’ details and indicating the action to be taken until all of the posts are marked as submitted.

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 message.

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 address, please contact:

Chris Roome

chris.roome@bathwells.anglican.org

01749 685130

or

Nick Goff

nick.goff@bathwells.anglican.org

01749 685110

14 March 2019