

APCM TRAINING TO ASSIST COMPLETING THE PLACE AUDIT ONLINE

The online process is designed to assist the completion of the annual APCM audit online.

You should have received an email from reception@southwell.anglican.org inviting you to complete your APCM submission online with instructions

The email will advise you what posts we require checking and updated if need be.

Contained within this email is an important link that you need to click on “%url%” to take you to the template specific to your church within the Church Management System.

We are more than happy for you to forward this email to someone else in your church who you would prefer to complete the submission.

Having clicked on the link it will open up an online screen which will be addressed to the owner of the email address this email has been sent.

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, Churchwarden, Churchwarden 2, Deanery Synod House of Laity, Safeguarding Officer.**

Within the following places: **Kneesall St. Bartholomew Church, Wellow St. Swithin, The Church of Test (used for training).**

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 5 audits have been completed.

0% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
Churchwarden	The Church of Test (used for training) (Church)	McNish, Fraser	04/04/2021		Waiting to be audited	View details
PCC Secretary	The Church of Test (used for training) (Church)	Hardy, Clare	04/04/2021		Waiting to be audited	View details
Treasurer	The Church of Test (used for training) (Church)	Kaiser, Jo	04/04/2021		Waiting to be audited	View details
Safeguarding Co-ordinator	The Church of Test (used for training) (Church)	Kaiser, Jo	04/04/2021		Waiting to be audited	View details

Please just follow the process. It identifies which roles you are auditing in the church you are representing.

There is a progress bar to show how much of the process has been completed and saves your changes automatically.

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

HELLO FRASER,

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.

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Currently, 1 out of 5 audits have been completed.

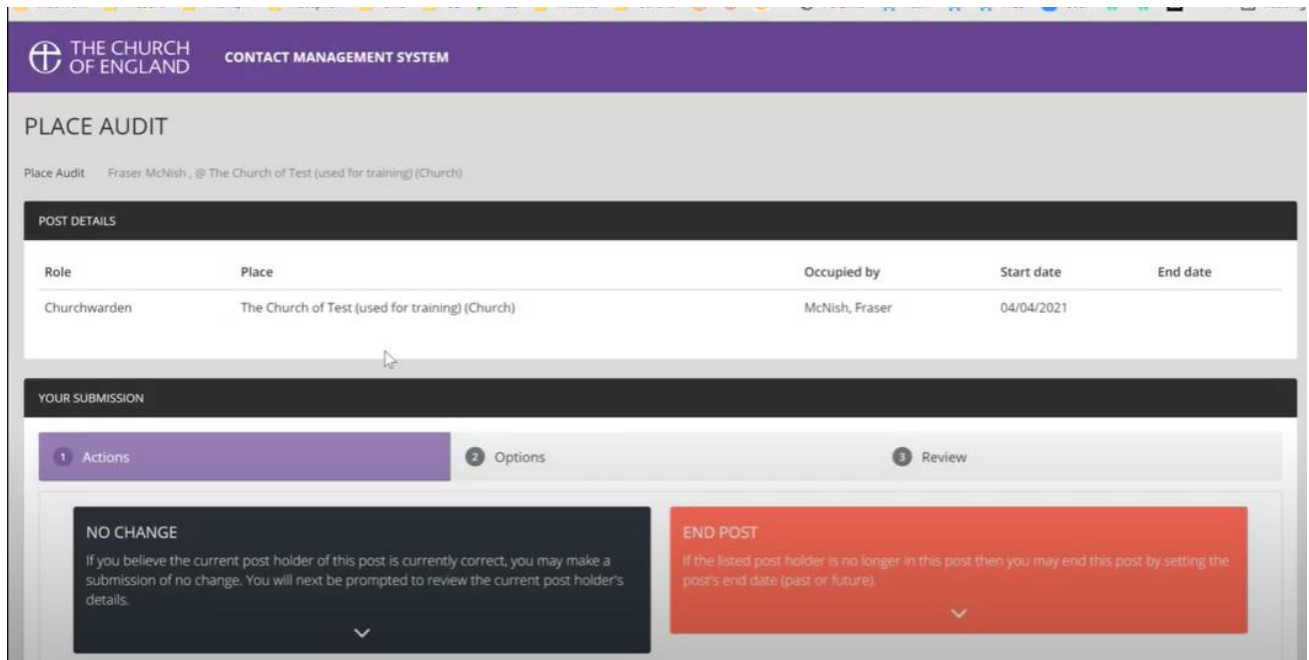
20% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
PCC Secretary	The Church of Test (used for training) (Church)	Hardy, Clare	04/04/2021		Waiting to be audited	View details
Treasurer	The Church of Test (used for training) (Church)	Kaiser, Jo	04/04/2021		Waiting to be audited	View details
Safeguarding Co-ordinator	The Church of Test (used for training) (Church)	Kaiser, Jo	04/04/2021		Waiting to be audited	View details
Deanery Synod House of Laity	The Church of Test (used for training) (Church)	Bloggs, Fred	04/04/2021		Waiting to be audited	View details
Churchwarden	The Church of Test (used for training) (Church)	McNish, Fraser	04/04/2021		Submitted - No Change	Fraser McNish View details

The roles requiring checking are shown. The process is as follows:

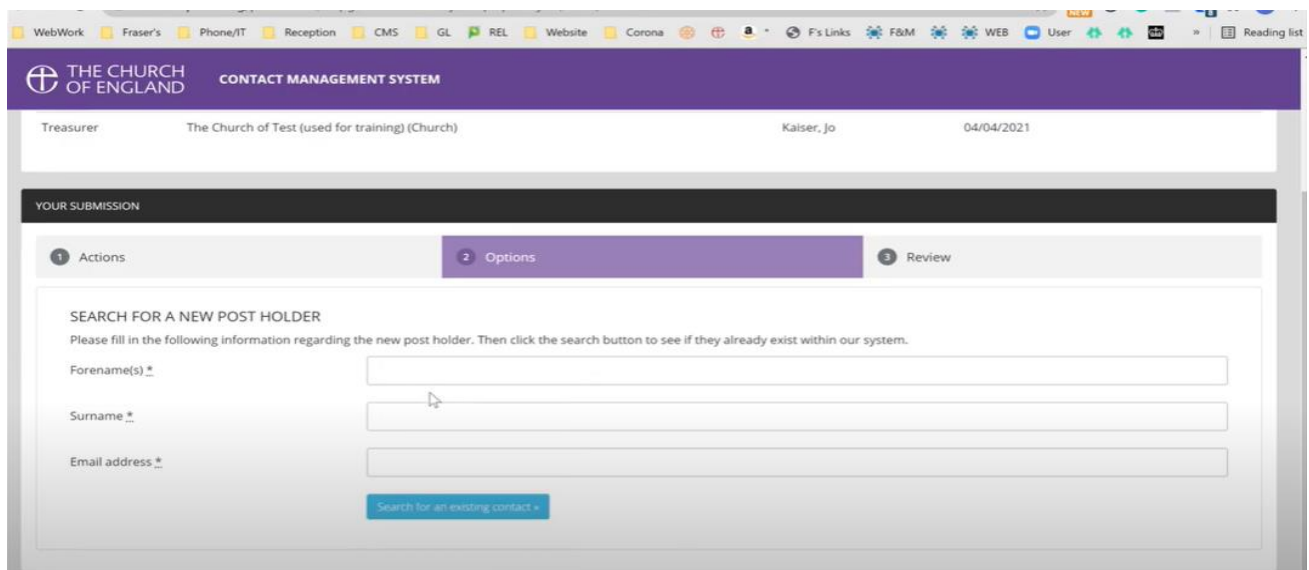
Click on the first role and details relating to it will show up.

Three options are given for handling the checking of the role.



They are NO CHANGE, END POST and lastly INFORMATION OF NEW POST HOLDER.

- NO CHANGE – the postholder remains the same; however if you spot incorrect information relating to the postholder (email/phone/address) then there is a box on the screen you can tick to inform us of the change;
- END POST – if the post has been discontinued; there is an option to advise us is the postholder is deceased.
- INFORMATION OF NEW POSTHOLDER – fill in as much information as you are able about the new postholder and click on “Search for an existing contact” button. The purpose of this is not to duplicate existing names in the database.



For example, put in the new postholder's name and any other information you have about them. The system will list or closely match the role you are trying to fill. If there is no match to the person then there is an option to create a new contact. Again supply as much information as possible and submit the information.

Apply this process to all roles requested by the audit until the process bar reaches 100% and all posts have been checked, updated and completed.

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

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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, 5 out of 5 audits have been completed.

100% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
Churchwarden	The Church of Test (used for training) (Church)	McNish, Fraser	04/04/2021		Submitted - No Change	Fraser McNish View details
PCC Secretary	The Church of Test (used for training) (Church)	Hardy, Clare	04/04/2021		Submitted - End	Fraser McNish View details
Treasurer	The Church of Test (used for training) (Church)	Kaiser, Jo	04/04/2021		Submitted - Succeed	Fraser McNish View details
Safeguarding Co-ordinator	The Church of Test (used for training) (Church)	Kaiser, Jo	04/04/2021		Submitted - Succeed	Fraser McNish View details
Deanery Synod House of Laity	The Church of Test (used for training) (Church)	Bloggs, Fred	04/04/2021		Submitted - No Change	Fraser McNish View details

Once all completed submit the checks for auditing and moderation by the team at Jubilee House. The information submitted will not be live and available until there is satisfaction that it is correct.

Finally the last option is the ABILITY TO REQUEST/CREATE A NEW POST, where appropriate.

THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

100% Completed

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REQUEST THAT A NEW POST IS CREATED WITHIN THE CMS

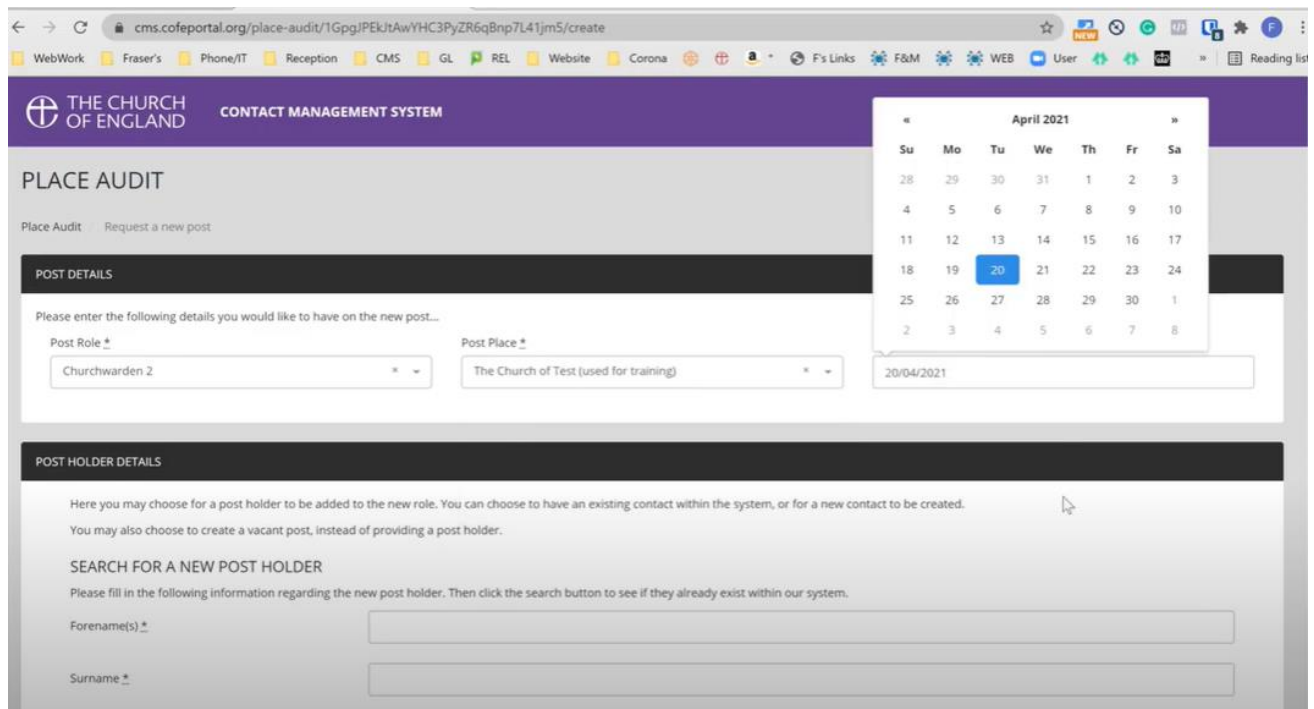
If you don't see a post that you believe should come under this audit's criteria, please use the following option.

This will submit a request to create a new post, with a contact to fill the new role.

[Request a new post](#)

The most common request is to ask for Churchwardens as they are not included in the roles we request to be checked.

It might be you need to add a second churchwarden if that is not already part of your system.



Should you have any problems with checking the roles please email reception@southwell.anglican.org for assistance.

Thank you for your assistance with the Annual Audit.

Reception/JP/April 2022