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 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.

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.

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, 0 out of 4 audits have been completed.

0% Completed

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

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

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

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**.

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.

⌄

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.

⌄

« Return to post list

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 »

If the details are correct, 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
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.

After adding new or additional details click on Continue to Review. This will bring up a screen to submit the information, as above.

Click on Submit your audit for this post. This will return you to the screen listing 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,

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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, 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)	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
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

9

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.

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

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
Parish Mag Ed	Anyparish (Parish)	Reader, Avid	01/05/2023	

YOUR SUBMISSION

1 Actions	2 Options	3 Review

Thank you for taking the time to audit this post. You have chosen the **end 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 this post is ending or has ended on the following date.

End Date

30/05/2023

Reset audit   Submit your audit for this post

« Return to post list

Click on Submit your audit for this post. This will return you to the screen listing 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

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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 details of the new postholder notified to the Diocesan Office Secretariat separately (details 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

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.

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	Anyparish (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.mi****@em***.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 »

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	Anyparish (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.mi****@em***.address
Start Date	31/05/2023

Reset audit   Submit your audit for this post

« Return to post list

A screen with details of the new postholder will come up. Click on Submit your audit for this post.

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

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

Click on Submit your audit for this post. This will return you to the screen listing 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,

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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

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

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

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 »

« Return to post list

After adding new details click on Continue to Review. This will bring up a screen to submit the information, as above.

Add a Post Not Listed

If an individual is appointed to one of the posts being audited that is not included in the roles to audit, click on Request a new post.

PLACE AUDIT

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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, 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 *

Search for an existing contact »

or Submit as vacant post

« 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.

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 diocese, have been found with similar details to those which you have provided.

Forename(s)	Surname	Known as	Email Address	
Testpilot	McTest	Testpilot	nick*****@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 is 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.

POST DETAILS

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

Post Role *	Post Place *	Start Date *
PCC Secretary	Anyparish (Parish)	30/05/2023

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)	Testpilot
Surname	McTest
Email address	nick*****@bath*****.anglican.org

« Back to previous step   Submit with post holder

or Submit as vacant post

« Return to post list

Developed by Amperative

If the new postholder is not on the list, click on Request a new contact, as above.

Repeat the process of until all 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:
Nick Goff
nick.goff@bathwells.anglican.org
01749 685110

Updated 31 May 2023