

PARISH OFFICER RETURN GUIDANCE

Upon clicking the unique link that you are sent, you will be taken to a summary page listing all the people currently holding the auditable posts in your parish which will look similar to this:

+ THE CHURCH OF ENGLAND CONTACT MANAGEMENT SYSTEM

PLACE AUDIT

HELLO MICHAEL,

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 are auditing.

You are currently auditing the following roles: **PCC Secretary, Electoral Roll Officer, PCC Treasurer, Churchwarden Second, Administrator, Deanery Synod Laity, Churchwarden First, Safeguarding Officer.**

Within the following places: **APCM Test 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 Secretary	APCM Test parish (Parish)	Squire, Michael	05/02/2020		Waiting to be audited	View details
Deanery Synod [Laity]	APCM Test parish (Parish)	Squire, Michael	11/12/2020		Waiting to be audited	View details
PCC Treasurer	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Waiting to be audited	View details
Churchwarden First	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Waiting to be audited	View details

Click the 'View Details' button for the person that you would like to edit and you will be taken to this page:

YOUR SUBMISSION

1 Actions
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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](#)

For each person listed, you will need to select one of the following options, which will depend on what was decided at your APCM:

- No Change – This should be selected when the current post-holder will remain in the position.
- New Post Holder – This should be selected when someone will replace the current post-holder.

- End Post – This should be selected when someone is retiring/standing-down but where there was no-one able to replace them in that role (you can create a vacant ‘place-holder’ post through this option).

NO CHANGE

If the post-holder will remain the same click ‘No Change’ and you will be taken to this page to review the details:

YOUR SUBMISSION

1 Actions

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CURRENT POST HOLDER DETAILS

Contact Name	Michael Squire
Primary Address	211 New Church Road, BN3 4ED
Secondary Address	
Telephone	<div style="display: flex; gap: 5px;"> <div style="display: flex; align-items: center; gap: 5px;"> 🏠 01273 421021 🔒 </div> <div style="display: flex; align-items: center; gap: 5px;"> ☎️ 01273 421021 🔒 </div> </div>
Email Address	📧 michael.squire@chichester.anglican.org 🔒

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 personal details are incorrect (perhaps if the person has moved or changed their email address or phone number) click the tick-box in the ‘Are these details incorrect?’ section and it will open up each line for you to type in new contact details.

Once you have entered the new details, or if the details were already correct, click the blue ‘Continue to Review’ button and you will be taken to the concluding page. If you have made a mistake, click ‘reset audit’ but if you are happy with the changes click ‘Submit your audit for this post’:

CONTACT MANAGEMENT SYSTEM

Role	Place	Occupied by	Start date	End date
PCC Secretary	APCM Test parish (Parish)	Squire, Michael	05/02/2020	

YOUR SUBMISSION

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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

You will now be taken back to the overall summary page, but your overall progress will be updated and the post that you just audited will now appear 'greyed-out' which means that nothing more can be done to that role.

NEW POST HOLDER

If a new person was elected or chosen to replace the currently listed post-holder then you should select 'New Post Holder' which will take you to a screen which looks like this:

The screenshot shows a web interface with two main sections: 'POST DETAILS' and 'YOUR SUBMISSION'.

POST DETAILS

Role	Place	Occupied by	Start date	End date
Churchwarden First	APCM Test parish (Parish)	Squire, Michael	09/12/2019	

YOUR SUBMISSION

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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 +](#)

On many occasions the new post-holder might already have a diocesan database profile and in order to prevent duplicates being created you are asked to enter the name and email address of the new post-holder so the database can check for an old profile:

A light blue horizontal bar contains the following text: Anna Quick Anna anna.quick@chichester.anglican.org [Select this contact +](#)

This will take you to a list of names, if there are many potential matches, click 'show more' to continue reviewing the list. The option that the database believes is the correct match will be highlighted as you see in the above example. If the person that you are attempting to add as the new post holder appears in this list, click the 'select this contact' button. If not, click the 'Request a new contact is created' located towards the bottom right of the screen.

You will now be taken to a screen to review your selection and to set a succession date (usually the date of your APCM). If the previous post holder has died, and that is why the post was vacated, you have the chance to tick the box to let us know that this is the case (and the profile of the recently deceased person will be deactivated on the database). Click continue to review once you are happy with the information or back to previous step if you think you have made a mistake:

1 Actions **2 Options** 3 Review

NEW POST HOLDER DETAILS

Forename(s)

Surname

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 »](#)

On the final screen, you are given the option to have one last review of the details and then can click ‘Reset audit’ if you have made a mistake, or ‘Submit your audit for this post’ if you are happy with the changes:

1 Actions 2 Options **3 Review**

Thank you for taking the time to audit this post. You have chosen the **succeed post** 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 a new person is now in this post and their details are as follows.

NEW POST HOLDER DETAILS

First Name(s)

Surname

Email Address

Start Date

[Reset audit](#) [Submit your audit for this post](#)

[« Return to post list](#)

After this you will be returned to the initial summary page showing your updated overall progress and with the posts that you have already audited ‘greyed-out’ to signify that they are completed:

HELLO MICHAEL,

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, Electoral Roll Officer, PCC Treasurer, Churchwarden Second, Administrator, Deanery Synod Laity, Churchwarden First, Safeguarding Officer.**

Within the following places: **APCM Test 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	
Deanery Synod [Laity]	APCM Test parish (Parish)	Squire, Michael	11/12/2020		Waiting to be audited		View details
PCC Treasurer	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Waiting to be audited		View details
PCC Secretary	APCM Test parish (Parish)	Squire, Michael	05/02/2020		Submitted - No Change	Michael Squire	View details
Churchwarden First	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Submitted - Succeed	Michael Squire	View details

END POST

If someone has retired/stepped down from their post but there is no one to replace them, you should select 'End Post'. On this screen you will be asked to enter the date that the person resigned from their post and you have the option to mark if the person is now deceased (if this was the reason that the post was vacated) and the option to create a vacant 'place holder' post.

NB: You should almost always select this box to create a vacant post if there is no-one to replace the recent post-holder (the only case where you would not tick that box is if the post was duplicated by mistake, e.g. two PCC Secretaries or three Parish Safeguarding Officers, etc and you want only the correct one to remain)

Once you have entered the date and selected the create a vacant post box, click the 'continue to review' button:

Role	Place	Occupied by	Start date	End date
Deanery Synod [Laity]	APCM Test parish (Parish)	Squire, Michael	11/12/2020	

YOUR SUBMISSION

1 Actions 2 Options 3 Review

END POST
Please enter the date this post ends or ended in the box below. This post allows for the option of having a new vacant post created when this post ends. You can optionally request that a vacant post is created by checking the box below.

Post end date

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

If the existing post holder is now deceased, then please check the box.

[Continue to Review »](#)

[« Return to post list](#)

You will then be taken to the final review screen which will show you your changes, if you have made a mistake, click 'Reset audit' to begin again, if you are happy with the changes click 'Submit your audit for this post'.

COMPLETING THE PARISH OFFICER FORM

Once you have audited each of the posts in the list with one of the above options you will notice that on the initial summary screen you will see the following '100% Completed' text on the progress bar and all of your posts will now be 'greyed-out' to signify completion:

PLACE AUDIT

HELLO MICHAEL,

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Within the following places: **APCM Test 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, 4 out of 4 audits have been completed.

100% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By	
PCC Secretary	APCM Test parish (Parish)	Squire, Michael	05/02/2020		Submitted - No Change	Michael Squire	View details
Deanery Synod [Laity]	APCM Test parish (Parish)	Squire, Michael	11/12/2020		Submitted - End	Michael Squire	View details
PCC Treasurer	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Submitted - No Change	Michael Squire	View details
Churchwarden First	APCM Test parish (Parish)	Squire, Michael	09/12/2019		Submitted - Succeed	Michael Squire	View details

Your APCM return will now be complete and all your submissions will appear in a queue for us to review and confirm.

If you realise that you made a mistake on one of the audits but had already confirmed it (so that it appeared 'greyed-out') you will not be able to correct the mistake, but if you email cms@diocant.org we will still be able to make adjustments for you.

If you need any further assistance or have any questions regarding the return please email cms@diocant.org.

Thank you for taking the time to complete your Parish Officer Return form.