

Place Audit Guide

This Guide walks you through the process of completing the Place Audit (formerly the Parochial Information Form (PIF)) for your parish and what the different screens will look like. Hopefully you will find it very easy to navigate, but please do contact parishsupport@salisbury.anglican.org if you have any problems.

An email with the title “Place Audit (PIF) Email with Link” is sent to all Parish Priests, PCC Secretaries and PCC Administrators, with a parish-specific link to click to allow you to complete your APCM return. Please find detailed instructions on how to complete this return below. The **deadline for holding the APCM is the 31st May** and the Place Audit should be completed as soon as possible after the APCM.

Upon clicking the link, 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:

Place Audit

Hello Katharine,

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, Churchwarden, Parish Administrator, Electoral Roll Officer, PCC Treasurer, Deanery Synod Elected Member, Parish Verifier, Safeguarding Officer.**

Within the following places: **Test parish (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 5 audits have been completed.

0% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By
Electoral Roll Officer	Test parish (Parish)	Longfoot, Miriam	05/04/2024		Waiting to be audited	View details
Churchwarden	Test parish (Parish)	Robinson, Katharine	05/04/2024		Waiting to be audited	View details
Deanery Synod Elected Member	Test parish (Parish)	Robinson, Katharine	05/04/2024		Waiting to be audited	View details
PCC Secretary	Test parish (Parish)	Robinson, Katharine	05/04/2024		Waiting to be audited	View details
PCC Treasurer	Test parish (Parish)	Longfoot, Miriam	05/04/2024		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 a page which will look like this:

The screenshot shows a web interface for submitting a post. At the top, there is a dark header with the text "Your submission". Below this is a navigation bar with three tabs: "1 Actions" (highlighted in purple), "2 Options", and "3 Review". The main content area contains three large, colored boxes, each with a title and a description, and a downward-pointing arrow at the bottom. The first box is dark grey and titled "No change", with the text: "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." The second box is light blue and titled "New post holder", with the text: "Please use this option where you wish to change the person in the post as this will end the current person's post and allow you to add the new post holder details." The third box is red and titled "End post", with the text: "Please do not use this option if you have a new person to add into this post, instead please use the new post holder option. Only use this option if you have no one to replace the current post holder." At the bottom left of the page, there is a dark button with the text "« 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 2 Options 3 Review

Current post holder details

Contact name	Miriam Longfoot
Primary address	Diocesan Office, Church House, Crane Street, Salisbury, SP1 2QB
Secondary address	
Telephone	01722 411922 (ext. 342)  
Email address	miriam.longfoot@salisbury.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 correct?' 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':

THE CHURCH OF ENGLAND Contact Management System

Place Audit

Place Audit / Miriam Longfoot, Electoral Roll Officer @ Test parish (Parish)

Post Details

Role	Place	Occupied by	Start date	End date
Electoral Roll Officer	Test parish (Parish)	Longfoot, Miriam	05/04/2024	

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 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 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:

Post Details

Role	Place	Occupied by	Start date	End date
PCC Treasurer	Test parish (Parish)	Longfoot, Miriam	05/04/2024	

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 »](#)

On many occasions the new post-holder might already have another existing role and/or 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 existing profile:

Katharine

Robinson

Katharine

katharine.robinson@salisbury.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:

Your submission

1 Actions 2 Options 3 Review

New post holder details

Forename(s)	Katharine
Surname	Robinson
Email address	katharine.robinson@salisbury.anglican.org

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:

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

Forename(s)	Katharine
Surname	Robinson
Email address	katharine.robinson@salisbury.anglican.org
Start date	07/04/2024

[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:

Place Audit

Hello Katharine,

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, Churchwarden, Parish Administrator, Electoral Roll Officer, PCC Treasurer, Deanery Synod Elected Member, Parish Verifier, Safeguarding Officer.**

Within the following places: **Test parish (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 5 audits have been completed.

40% Completed


Role	Place	Occupied by	Start date	End date	Status	Audited By	
Churchwarden	Test parish (Parish)	Robinson, Katharine	05/04/2024		Waiting to be audited		View details
Deanery Synod Elected Member	Test parish (Parish)	Robinson, Katharine	05/04/2024		Waiting to be audited		View details
PCC Secretary	Test parish (Parish)	Robinson, Katharine	05/04/2024		Waiting to be audited		View details
Electoral Roll Officer	Test parish (Parish)	Longfoot, Miriam	05/04/2024		Submitted - No Change	Katharine Robinson	View details
PCC Treasurer	Test parish (Parish)	Longfoot, Miriam	05/04/2024		Submitted - Succeed	Katharine Robinson	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 the 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:

 THE CHURCH OF ENGLAND Contact Management System

Place Audit

Place Audit / Katharine Robinson , Deanery Synod Elected Member @ Test parish (Parish)

Post Details

Role	Place	Occupied by	Start date	End date
Deanery Synod Elected Member	Test parish (Parish)	Robinson, Katharine	05/04/2024	

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 Place Audit

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:

 THE CHURCH OF ENGLAND Contact Management System

Place Audit

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Within the following places: **Test parish (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, 5 out of 5 audits have been completed.

100% Completed

Role	Place	Occupied by	Start date	End date	Status	Audited By	
Electoral Roll Officer	Test parish (Parish)	Longfoot, Miriam	05/04/2024		Submitted - No Change	Katharine Robinson	View details
Churchwarden	Test parish (Parish)	Robinson, Katharine	05/04/2024		Submitted - No Change	Katharine Robinson	View details
Deanery Synod Elected Member	Test parish (Parish)	Robinson, Katharine	05/04/2024		Submitted - End	Katharine Robinson	View details
PCC Secretary	Test parish (Parish)	Robinson, Katharine	05/04/2024		Submitted - No Change	Katharine Robinson	View details
PCC Treasurer	Test parish (Parish)	Longfoot, Miriam	05/04/2024		Submitted - Succeed	Katharine Robinson	View details

Please note that you will not receive an email notification, but if your screen shows '100% completed' then your Place Audit has been successfully submitted.

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 parishsupport@salisbury.anglican.org we will still be able to make adjustments for you.

Thank you for taking the time to complete your return. If you need any further assistance or have any questions, please email us as above and we will be happy to help you.

Best wishes

Miriam Longfoot