Place Audit Guide

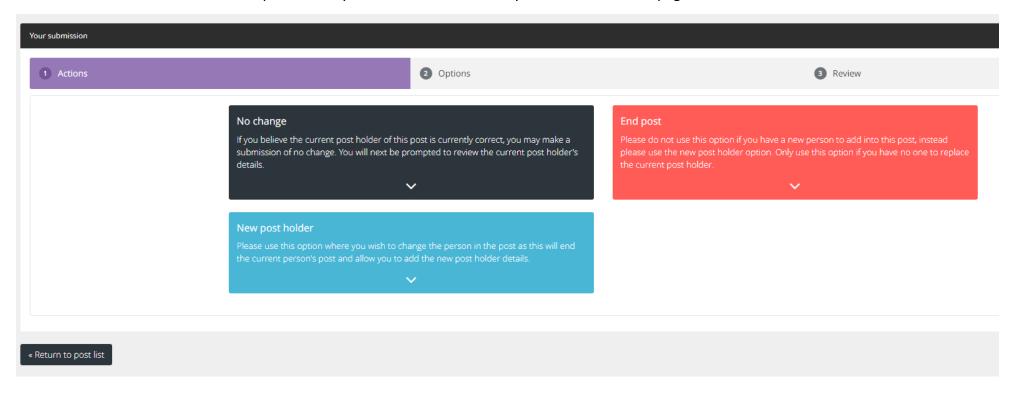
This Guide walks you through the process of completing the Place Audit (formerly the Parochial Information Form (PIF)) for your parish and what the different screens will look like. Hopefully you will find it very easy to navigate, but please do contact parishsupport@salisbury.anglican.org if you have 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 31**st **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. Place End date Audited By Role Occupied by Start date Status Electoral Roll Officer Test parish (Parish) Longfoot, Miriam 05/04/2024 Waiting to be audited Churchwarden Test parish (Parish) Robinson, Katharine 05/04/2024 Waiting to be audited Deanery Synod Elected Member Test parish (Parish) Robinson, Katharine 05/04/2024 Waiting to be audited 05/04/2024 PCC Secretary Test parish (Parish) Robinson, Katharine Waiting to be audited PCC Treasurer Test parish (Parish) Longfoot, Miriam 05/04/2024 Waiting to be audited

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:

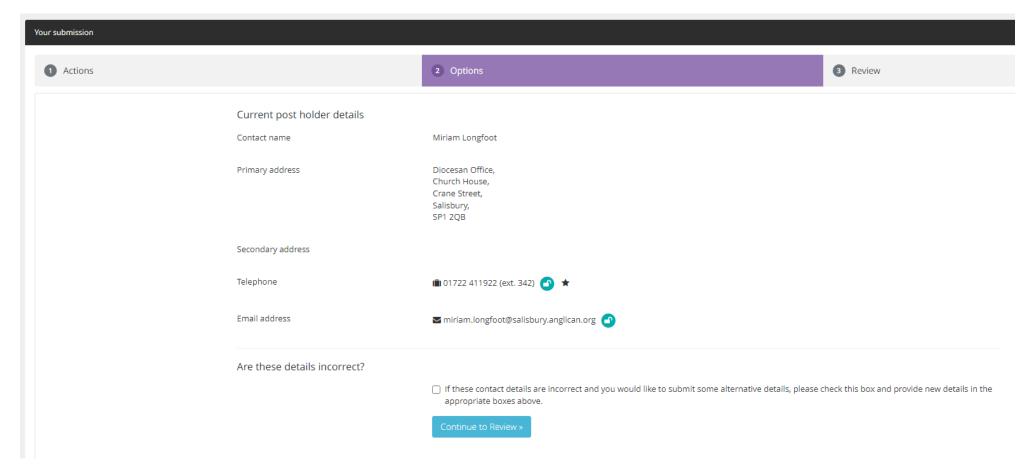


For each person listed, you will need to select one of the following options, which will depend on what was decided at your APCM:

- 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).

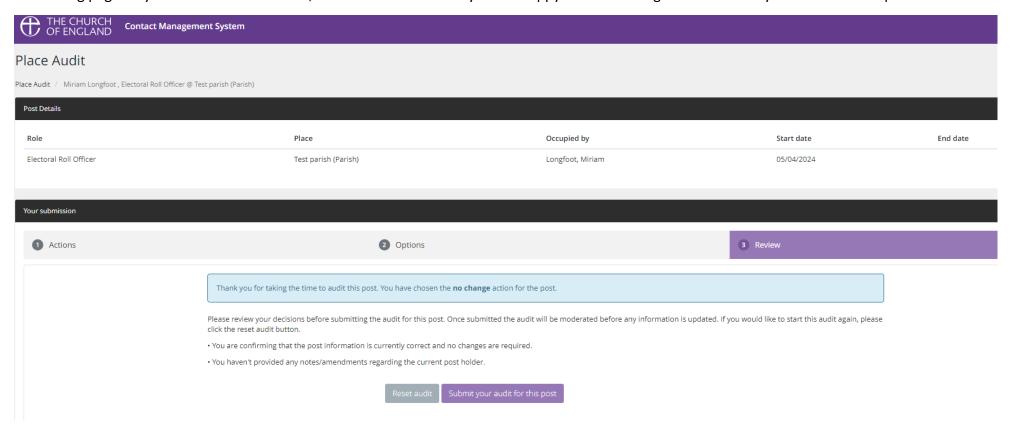
No Change

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



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.

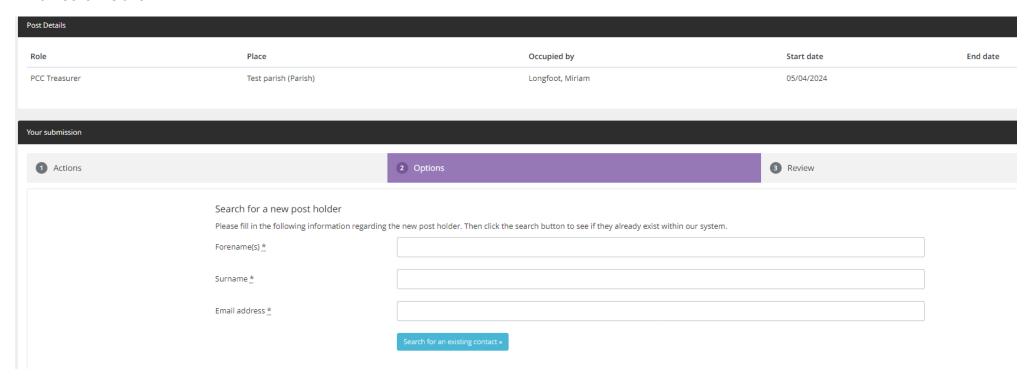
Once you have entered the new details, or if the details were already correct, click the blue 'Continue to Review' button and you will be taken to the concluding page. If you have made a mistake, click 'reset audit' but if you are happy with the changes click 'Submit your audit for this post':



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:

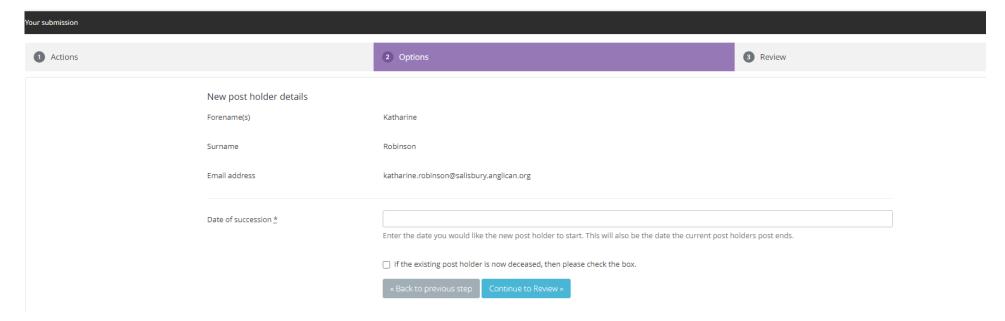


On many occasions the new post-holder might already have another existing role and/or a diocesan database profile and in order to prevent duplicates being created you are asked to enter the name and email address of the new post-holder so the database can check for an existing profile:

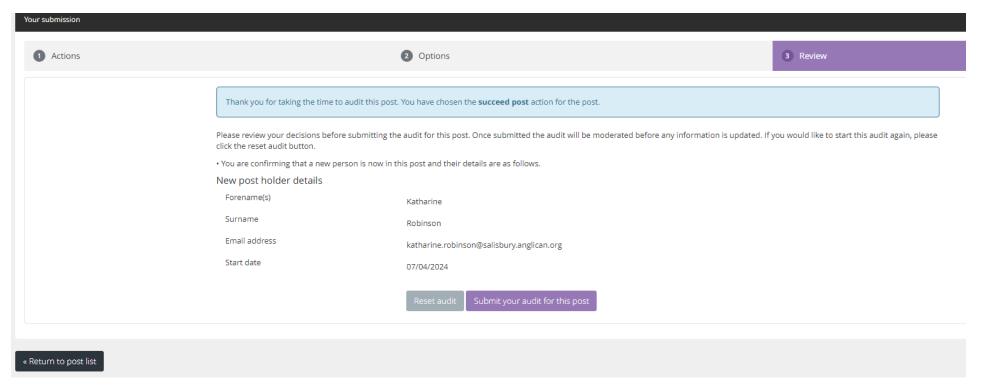
Katharine Robinson Katharine katharine.robinson@salisbury.anglican.org Select this contact »

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.

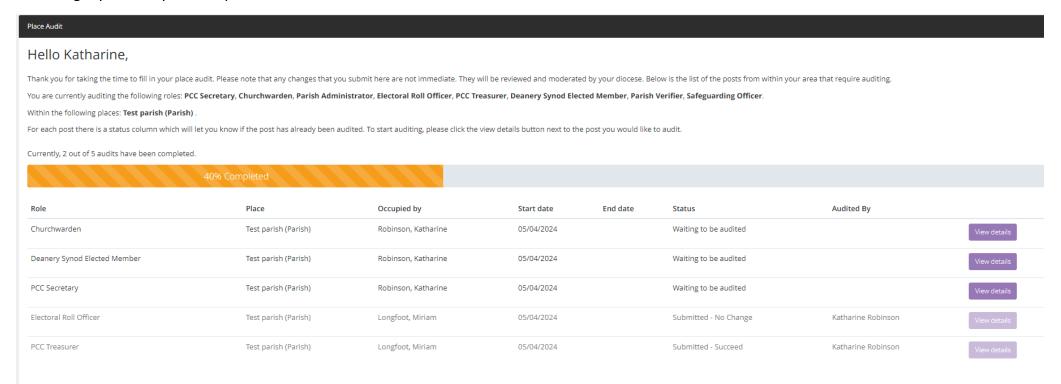
You will now be taken to a screen to review your selection and to set a succession date (usually the date of your APCM). If the previous post holder has died, and that is why the post was vacated, you have the chance to tick the box to let us know that this is the case (and the profile of the recently 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:



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:



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:

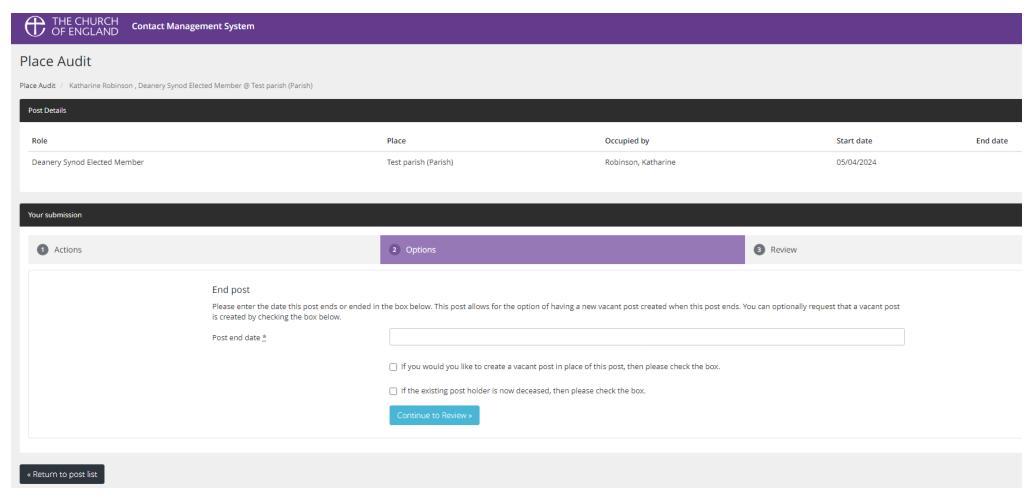


End Post

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:



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:



Contact Management System

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, 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