



PROTECT MY MINISTRY AND PLANNING CENTER ONLINE

April, 2021

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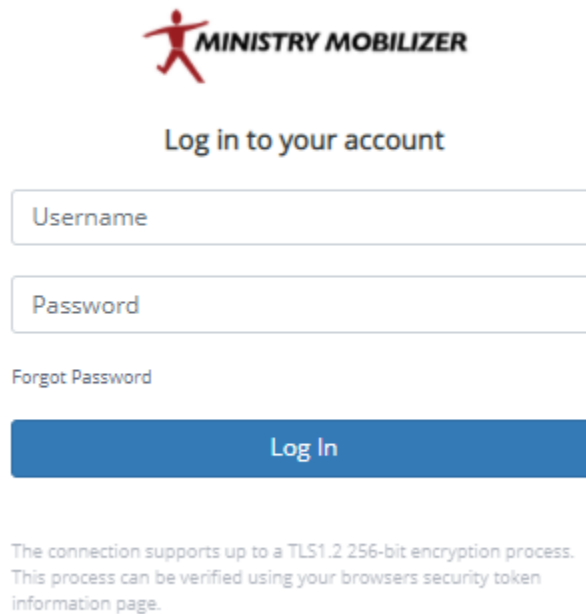
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Account Set Up

Our support staff will need to enable your Protect My Ministry account to work with Planning Center Online.

Log in to Ministry Mobilizer

Log in to Ministry Mobilizer with your MM credentials -do not enter your PCO credentials here.

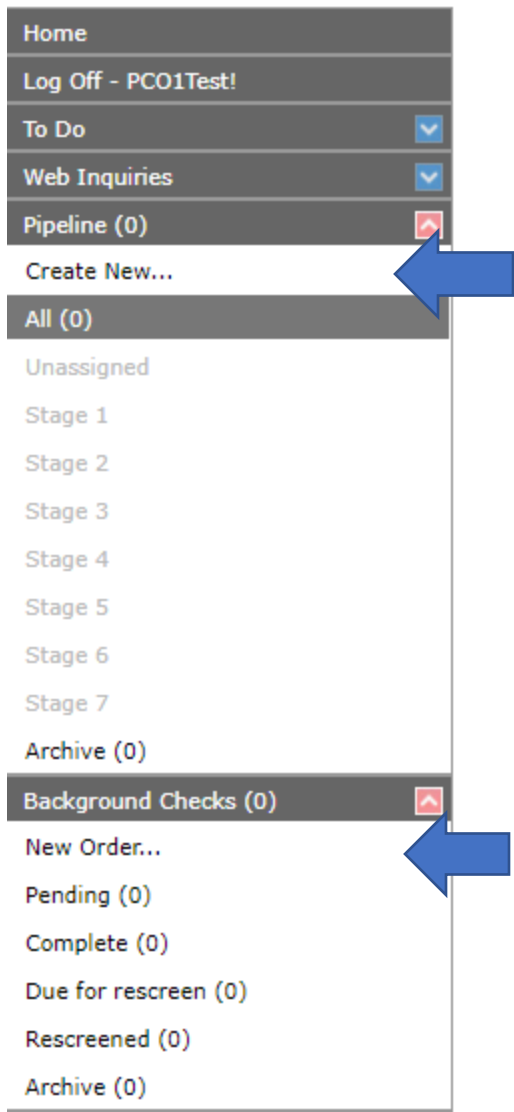


The image shows the Ministry Mobilizer login interface. At the top is the logo, which consists of a red stick figure icon to the left of the text "MINISTRY MOBILIZER". Below the logo is the heading "Log in to your account". There are two input fields: the first is labeled "Username" and the second is labeled "Password". Below the password field is a link that says "Forgot Password". At the bottom of the form is a blue button with the text "Log In". Below the button, there is a small disclaimer: "The connection supports up to a TLS1.2 256-bit encryption process. This process can be verified using your browsers security token information page."

You will arrive at our Home Page where you will find links to helpful resources, updates and access to helpful forms and resource documents. Click 'Continue'.

Authenticating your PCO Account

To connect Ministry Mobilizer (PMM) with your Planning Center Online account for the first time, click 'Create New' in the Pipeline (Bundle 2 or higher) or the 'New Order' menu in Background Checks (Bundle 0 and higher). You will be prompted to enter your Planning Center Online account credentials.



For additional information regarding Ministry Mobilizer and its capabilities, please reference our User Guide. There is a link to the full user guide on the Home page of your account. The process of adding applicants though can ONLY be done through this import process or their results will not return to Planning Center Online.



Planning Center

Your Email or Phone

.....

Log In

[Need a password?](#)

Entering your PCO credentials will allow us to connect to your Planning Center Online account.

Your account is now connected. Periodically, you will be prompted to allow Protect My Ministry to continue connecting with your Planning Center Account. This is normal and to be expected every 90 days.

Using Electronic Consent Forms (Bundle 2 and higher)

Create New - Import Planning Center People

Enter the name of the applicant and click search.

Last Name: First Name:

- Go to Pipeline, Create New and search by 'exact' last name/first name for the applicant you wish to import and request that they complete our electronic consent form. We are not able to search by partial names in PCO unfortunately so if you spell the name incorrectly, it will not find them. If they have already been imported previously, you will see the "Order Background Check" link instead of "Import" (go back to your pipeline All and search for them there if you only want an updated consent form or else continue to Order the Background Check)

Create New - Import Planning Center People

Enter the name of the applicant and click search.

Last Name: First Name:

First	Last	Email	Address	City	State	Zip	Import
No	Details						Order Background Check
All	Details	email@email.com	1 Test Street	Tampa	florida	33618	Import

- If your applicant is found, their information will appear and you will have the option to import them.
- Clicking the 'Import' link will populate our New Applicant Detail page where you will need to supply the email if missing. If the email field does populate, click the email in the box to verify it which will enable the Send Online Consent Form Link to Applicant button. (we will remove the requirement to click in the email field in a future update)

****Note**** If the applicant name you are searching matches more than one applicant or you only search by last name and it brings back multiple applicants, be sure to select the right one. We cannot fix or credit orders placed for the wrong applicant.

Create New - Import Planning Center People							
Enter the name of the applicant and click search.							
Last Name: <input type="text" value="fowler"/>		First Name: <input type="text"/>		<input type="button" value="Search"/>			
First	Last	Email	Address	City	State	Zip	Import
Jennifer	Fowler	jennifer.fowler@ministrybrands.com					Order Background Check
Jennifer	Fowler	jennifer.fowler@ministrybrands.com					Import
Jack	Fowler						Import

You can go to the Pipeline All Menu and confirm your applicant is now in the Ministry Mobilizer account and the red X indicates you are awaiting the consent form. The red x will turn to a green check once the authorization is received OR if you place an order and certify that you have received the paper consent before submitting the order. If your order fails for an error, the green check will remain.

- Applicant will be sent the email with a link to the online form. If you wish to customize this email, go to your Menu>Settings>Consent Form Email Settings to make changes. DO NOT change the "Email From" field unless you are familiar with creating an SPF record and/or setting up DMARC to allow us to send email on behalf of your organization or your emails will bounce. Also do not remove any information shown in brackets. Those fields and their brackets need to remain.

Test Planning Center is considering you for an opportunity.



message@veritysecure.com

To: Jennifer Fowler

Retention Policy Exchange Retention Policy (3 years)

Expires: 3/25/2024

This is the most recent version, but you made changes to another copy. Click here to see the other versions.

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear Jennifer Fowler,

Your inquiry regarding an opportunity with Test Planning Center has been reviewed and more information about you is needed to further consider your participation.

Please follow the provided link to submit your information.

<https://staging-ministryopportunities-org.pmmdev.io/Application.aspx?oid=62763&aid=12798938&LinkId=9bc292fc-9026-4480-8dea-a72e62a2f533>

Thank you for your interest in Test Planning Center's opportunity.

[A Summary of Your Rights Under the Fair Credit Reporting Act](#)

- Once the applicant submits the online form you will receive an email notification if your user has this email notification enabled. To confirm your user email settings: Menu>Settings>User Administration>Edit>Check the boxes for all email notifications desired.

New mobilizemyministry.com Application



message@veritysecure.com

To ● Jennifer Fowler

[Retention Policy](#) [Exchange Retention Policy \(3 years\)](#)

Expires 3/25/2024

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Organization Name:Test Planning Center

New application by Jennifer Fowler.

[Log into your account for details.](#)

- Here is a sample of our default online form but you can customize this with your logo and/or change background colors etc. Menu>Settings>Customization



Organization: Test Planning Center 2

Please enter your information within the next 40 minutes

PERSONAL INFORMATION

Full Legal Name:
First Middle Last

I have no legal middle name

Other Names Used: Check this box to enter other names you may have been known as in the past, such as your maiden name.

Date of Birth:
(MM/DD/YYYY) (Required for identification purposes only)

Email:

Confirm Email:

Social Security Number: Enter Numbers Only
(###-##-####) (Required Only for Identity Verification Purposes)

Current Address Since:
(MM/DD/YYYY) Street, Apartment, etc.

State City Zip

I certify that all personal information entered above is true and accurate.

First Name: Middle Name: Last Name: Date:

Continue

** THIS ONLINE APPLICATION IS PROTECTED BY A SECURE CERTIFICATE AUTHORITY, WHICH SUPPORTS UP TO A TLS1.2 256-BIT ENCRYPTION PROCESS. THIS PROCESS CAN BE VERIFIED USING YOUR BROWSER'S SECURITY CERTIFICATE INFORMATION PAGE. ALL INFORMATION PROVIDED ON THIS FORM IS SECURE. FOR MORE INFORMATION ON HOW TO ACCESS THIS INFORMATION, PLEASE CONTACT US.*

Auto Order Background Checks

If you plan to order the same background check package on every applicant, you can set up your account to 'Auto Order' the report once the application is submitted. To add this option to your account:

Menu>Settings>Additional Settings and click “this Release” link to fill out the form and email it to our Customer Service team. They will let you know once set up is complete. You will still be notified upon receipt of each application as well as when the report completes.

Order Background Checks after using electronic consent form

If you previously added an applicant to your account and were waiting on them to complete the consent form, you can go back to your Pipeline All menu and order the background check once you receive the notification that the application was received. Place a checkmark in the box to the left of their name which will open the Actions menu on your left. Click the Action “Order Background Check”. You can also do this for multiple applicants (bulk order) by placing the check next to multiple names and then selecting the Order Background Check option.

Applicants: All

Report	Training	Auth	Applicant Added	First	Last	Phone	Department	Position	Email	Stage	Active
<input checked="" type="checkbox"/>		✓	03/26/2021	Jennifer	Fowler		None	Standard	jennifer.fowler@ministrybrands.com	none	Y

ACTIONS

- New...
- Open...
- Order Background Check...
- Order and Email Invite For Training...
- Update Active Status
- Send to Archive

Applicants: Unassigned

Report	Training	Auth	Applicant Added	First	Last	Phone	Department	Position	Email	Stage	Active	
<input checked="" type="checkbox"/>	Complete	✓	04/01/2021	Auto	Order		None	Standard	jennifer.fowler@ministrybrands.com	none	Y	
<input checked="" type="checkbox"/>	Complete	Cancelled	✓	04/01/2021	Bundled	WithQuestions (800)900-9090	Test	Test	jennifer.fowler@ministrybrands.com	none	Y	
<input checked="" type="checkbox"/>		✓	03/30/2021	Public	Link		None	Standard	jennifer.fowler@ministrybrands.com	none	Y	
<input checked="" type="checkbox"/>		✓	03/29/2021	Under	18		None	Standard	jennifer.fowler@ministrybrands.com	none	Y	
<input checked="" type="checkbox"/>	Complete	Complete	✓	03/26/2021	Jennifer	Fowler		None	Standard	jennifer.fowler@ministrybrands.com	none	Y

ACTIONS

- New...
- Open...
- Order Background Check...
- Order and Email Invite For Training...
- Update Active Status
- Move to Stage:
- Send to Archive
- Change Opportunity:

Ministry Mobilizer Version 9.5.0 STG

- If you want to use billing references for your orders so that accounting can subtotal your invoices by billing reference, you can add them here: Menu>Settings>Billing Refs>New (150 char max)

- Select the package from the drop-down menu and check the box to add alias names if desired. If ordering the Plus package or any package that requires additional information, you will be prompted for those additional details.
- Add Child Safety Training to your order if desired (Bundle 1 and higher). If training is ordered, the applicant will receive a separate email with a link to the online video. There is an exam at the end of the video and a certificate will be issued for 70% and higher. You will be emailed upon completion of the training and a link to this certificate will appear in their profile of PCO as well. As with the online form, you may customize this email as well.

Order Background Check

Name: Jennifer Fowler

Billing Ref: [None]

Package: BASIC
 *Minimum Recommendation – Click [here](#) for explanation.

Services: National Combo Search (SSN, Nat'l. Crim Database Search, Nat'l. Sex Offender Registry)

Search AKA (Maiden Name): (Additional Charges Apply--Applies to all Court Searches)

Order and Email Invite for Training

Child Safety Training (Free with background check)

- Employee (Extended Series-Approved by the Texas Department of State Health Services)
- Volunteer
- Spanish (Extended Series-Approved by the Texas Department of State Health Services)

Next

- Complete the order on the next page by certifying the order and clicking the Submit button.
- View of Pipeline once report and training are both complete

Applicants:All

Last Name: --Enter a last name to filter by-- Department: All

Report	Training	Auth	Applicant Added	First	Last	Phone	Department	Position	Email	Stage	Active
<input type="checkbox"/> Complete	Complete	✓	03/26/2021	Jennifer	Fowler		None	Standard	jennifer.fowler@ministrybrands.com	none	Y

Page size: 100 1 items in 1 pages



Order Background Checks without online consent form

If you are **not** using our electronic consent form, you may start a new order by going to Menu>Background Checks>New Order

- Filter/Search for your applicant and click import
- Complete required fields (first/last name, SSN, DOB, Email and State)
- Click Submit

- Select package from the drop-down menu and add training if desired; if your order requires additional information, you will be asked on the subsequent pages
- Certify order on final page and submit

Viewing Background Check and Child Safety Training Results in Planning Center Online

- Log in to your Planning Center Online Account
- If you were notified by email that a background check is complete for an applicant, search for that applicant
- Click on “Notes” for that applicant. The status of all orders will be present
- The following image shows the background check is pending and the Child Safety Training was ordered and the applicant invited to view the video and take the exam.
- These notes can also be filtered to show just Training or just Background Check results using the “Filter” dropdown in PCO.

Notes

Filter notes by:

Training for Grumpy Person (12798951)
Status: Invited

Mar 30, 2021 by Jennifer Fowler

Background Check for Grumpy Person (RQ6040273)
Status: Pending

Mar 30, 2021 by Jennifer Fowler

The following image shows the Background Check now complete and the training complete as well.

Training for Reuben Stanley

Request ID: 12798958-f2a7463b-a94e-4a20-bce4-7ede891a086d

Timestamp: 4/1/2021 10:23:22 AM

Status: Completed

Score: 100%

Certificate URL: <https://ms.pmmdev.io/training/certificate/f2a7463b-a94e-4a20-bce4-7ede891a086d>

Apr 1, 2021 by Jennifer Fowler

Background Check for Reuben Stanley

Request ID: 12798958-6040293

Timestamp: 4/1/2021 5:34:33 AM

Status: Completed

Recommendation: Accept

Report URL: <https://orders.protectmyministry.com/webservice/getreport.cfm?reportID=8183962&ReportKey=/>

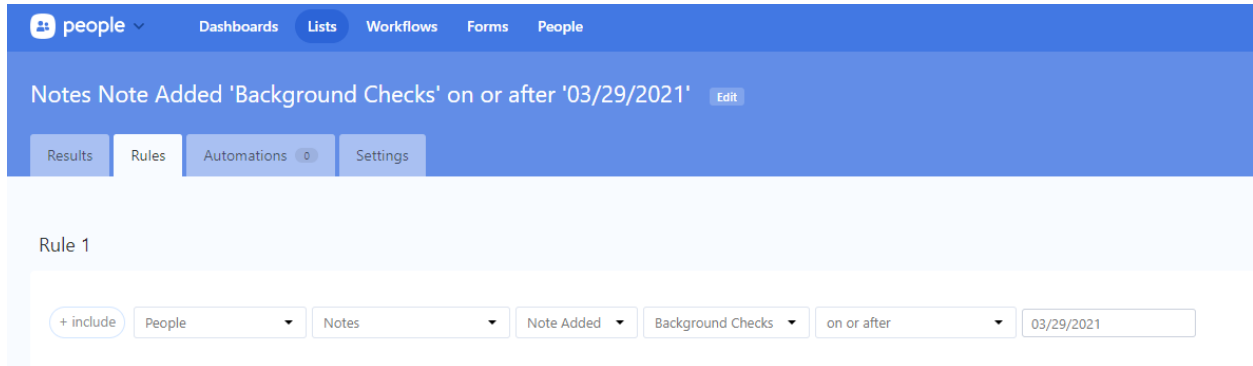
Apr 1, 2021 by Jennifer Fowler

Viewing Completed Background Checks and Training in Planning Center Online

- Besides going to the Notes section of the applicant profile, you can also go to People Dashboard>Select Profile Notes Tab>Filter by Background Checks Note Category>Select Date Range. You can also print/export this list using the PCO CSV export or print buttons.
- We are not able to update the Background Checks tab as that is limited by Planning Center Online. We hope they will give us access to that area in the future.

Creating a List in Planning Center for Completed Background Checks

- Go to “Lists”
- Create a rule in order to build your list. Here is an example of a list that will include all persons who had a background check since March 29, 2021



The screenshot shows the Planning Center interface. At the top, there is a navigation bar with the following items: "people" (with a dropdown arrow), "Dashboards", "Lists" (highlighted), "Workflows", "Forms", and "People". Below the navigation bar, there is a header area with the text "Notes Note Added 'Background Checks' on or after '03/29/2021'" and an "Edit" button. Below the header, there are four tabs: "Results", "Rules", "Automations" (with a plus icon), and "Settings". The "Rules" tab is selected. Below the tabs, there is a section titled "Rule 1". Under "Rule 1", there is a configuration bar with the following elements: a "+ include" button, a "People" dropdown menu, a "Notes" dropdown menu, a "Note Added" dropdown menu, a "Background Checks" dropdown menu, an "on or after" dropdown menu, and a text input field containing "03/29/2021".

- Click Submit to get your list

Using PMM’s Risk Assessment with Planning Center Online

Protect My Ministry offers a service where we can ‘grade’ your reports for you and assign a status based on criteria provided by your organization. This ‘status’ will appear in Planning Center Online in the applicant’s notes along with the url to the report. Below is an image of two reports. One is graded and shows the recommendation ‘Accept’ and the other one is not graded.

Background Check for Happy Person (RQ6040278)

Timestamp: 3/31/2021 2:18:11 PM

Status: Completed

Recommendation: Accept

Report URL: <https://orders.protectmyministry.com/websevice/getreport.cfm?reportID=8182158&ReportKey=AED638A2-DA16-4448-93FB-DC9C61BCCADD>

Mar 31, 2021 by Jennifer Fowler

Background Check for Happy Person (RQ6040274)

Status: Completed

Report URL: <https://orders.protectmyministry.com/websevice/getreport.cfm?reportID=8180544&ReportKey=EC81B5F1-DD2A-4A39-B866-D217F3B4C6AA>

Mar 31, 2021 by Jennifer Fowler