Integrated Background Checks &

Child Safety Training for Pushpay (formerly Church Community Builder)

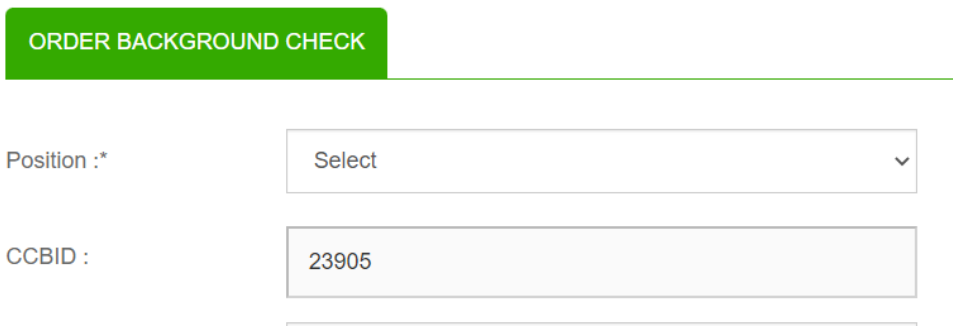
October 17, 2023

Contents

Note: Before starting to use Protect My Ministry-

Applicant Merging

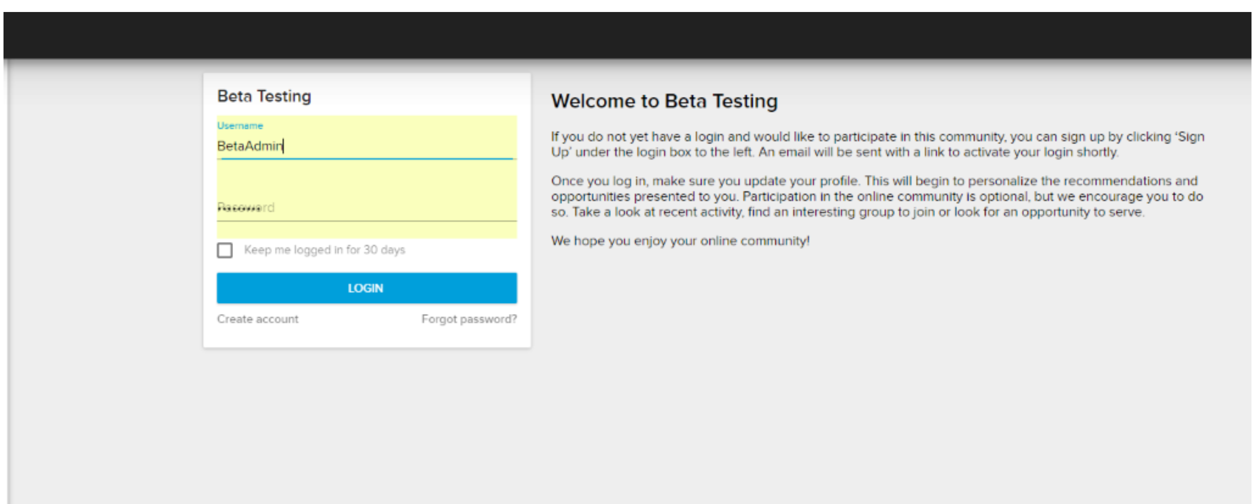
Please confirm Ministry Mobilizer and Pushpay IDs before merging applicants and be sure to keep the profile that has the most current background check report and consent form when merging. Please contact us before merging with any questions. To confirm the Pushpay ID Protect My Ministry has on file for an applicant, click the PMM Report link in their profile, log in and go to Order Background Check menu. The Pushpay ID (formerly CCBID) will be displayed beneath the Position drop down.



Account Set Up

Pushpay API User Creation

As the Master Administrator or a user with the "Edit System-wide Settings" admin privilege, on the Pushpay login page, enter your Username and Password as you would normally log in to the system. (our screen shots will appear slightly different from your account as we use a developer's sandbox for testing)



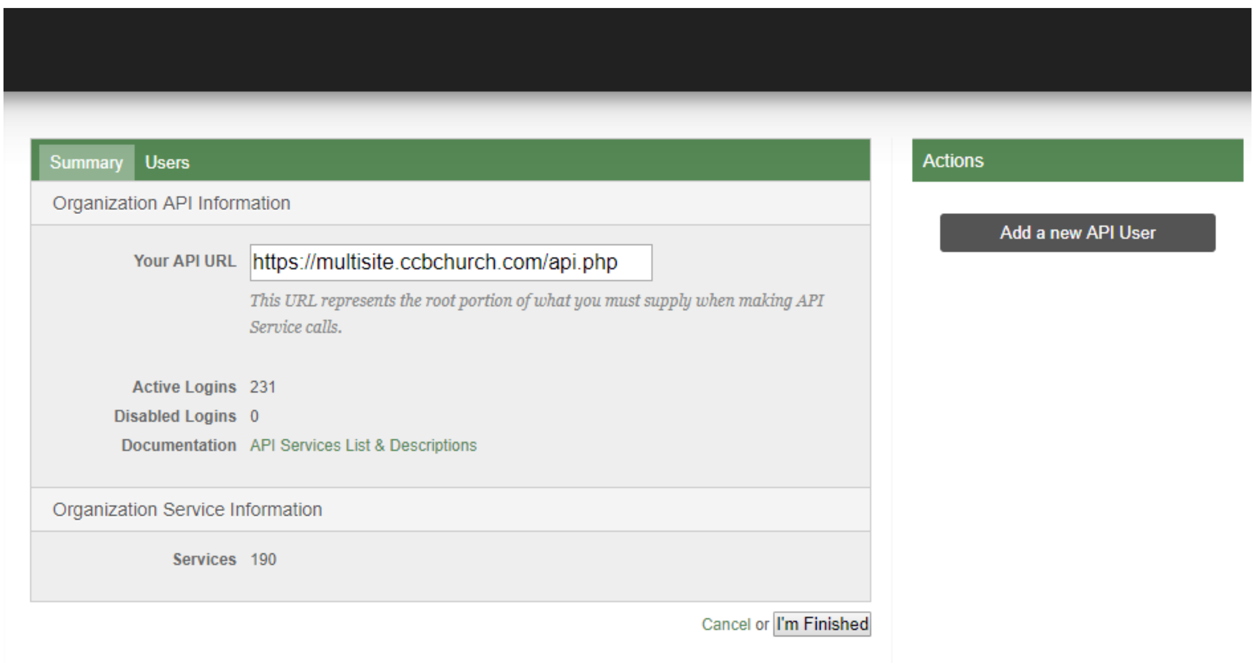
Create API User

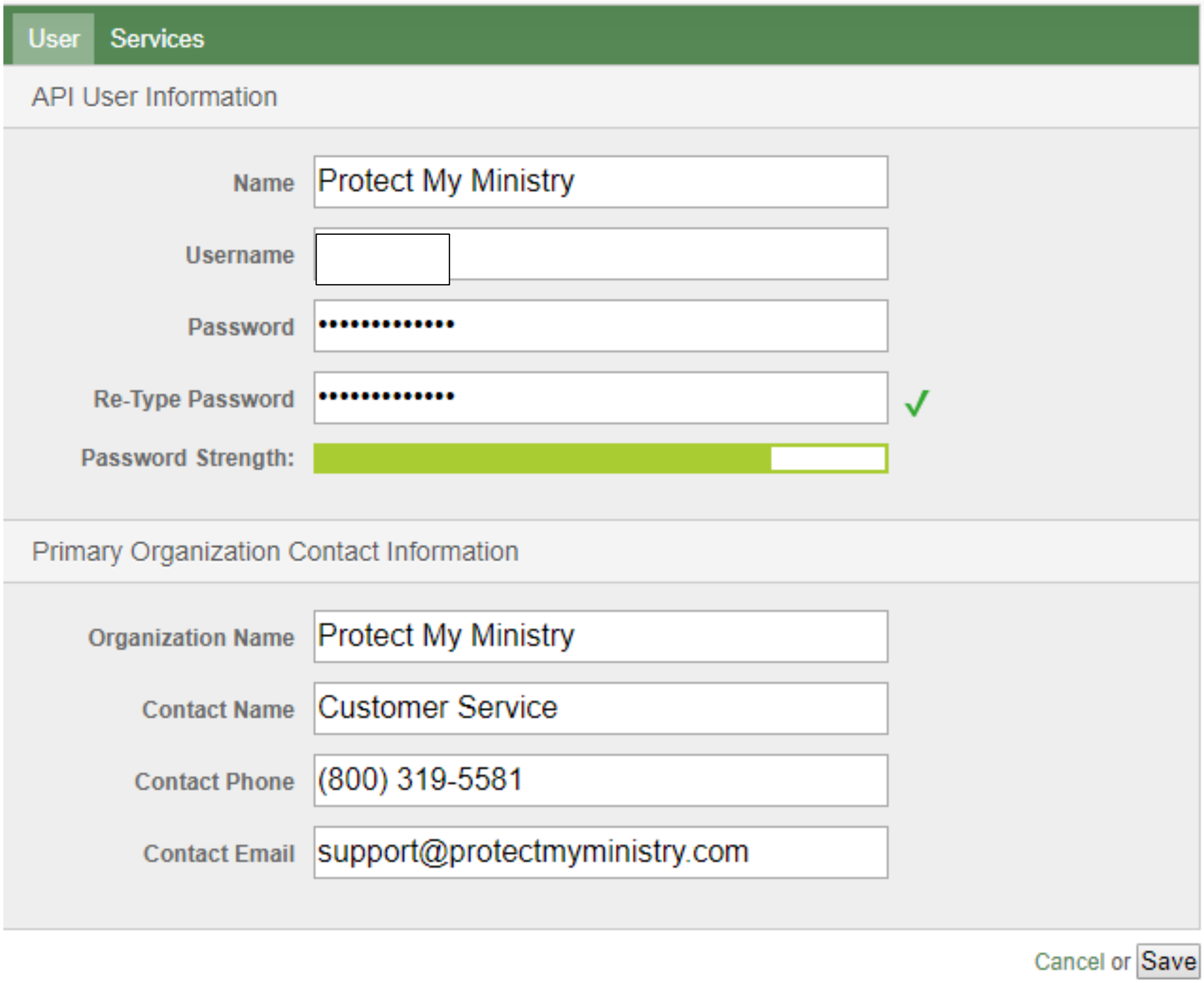
- Open the System Settings by clicking the wheel in the upper right-hand corner and select API from the drop-down menu.
- Select the Add a new API User from the Actions menu.
- You will need to enter the following information in the fields provided:
  - **Name** Protect My Ministry
  - **Username** – will be provided after signup.
  - **Password** – will be provided after signup.

You will also need to enter the Primary Organization Contact Information:

- **Organization Name** Protect My Ministry
- **Contact Name** Customer Service
- **Contact Phone** (800) 319-5581
- **Contact Email** support@protectmyministry.com

SAVE YOUR INFORMATION (bottom right-hand corner)





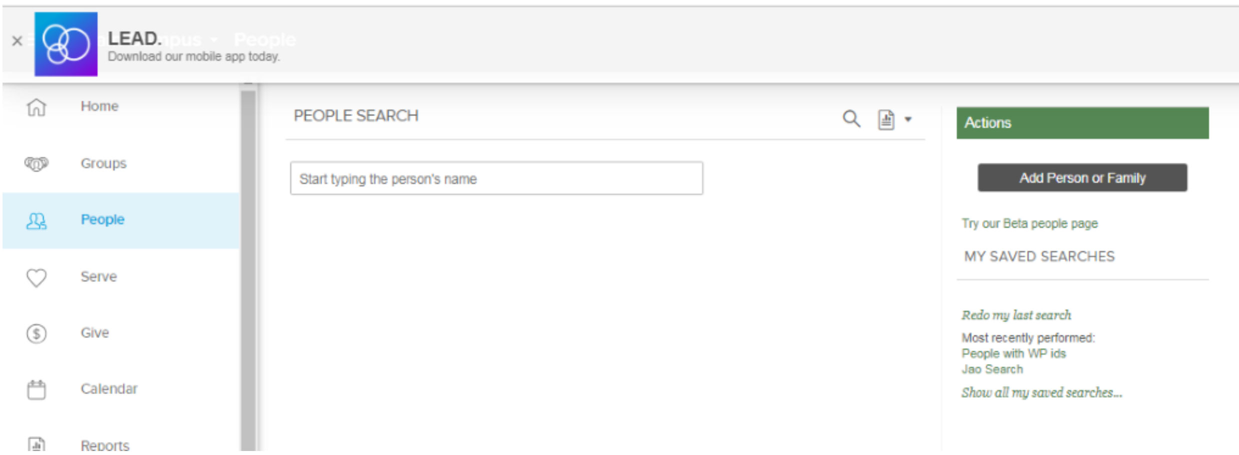
- Select the Services tab on the same page (image above) and you **MUST** enable the following services:
  - add_individual_to_queue.
  - custom_field_labels
  - execute_search
  - individual_profiles
  - individual_profile_from_id
  - individual_search
  - update_custom_field_labels
  - update_individual

SAVE YOUR INFORMATION!!

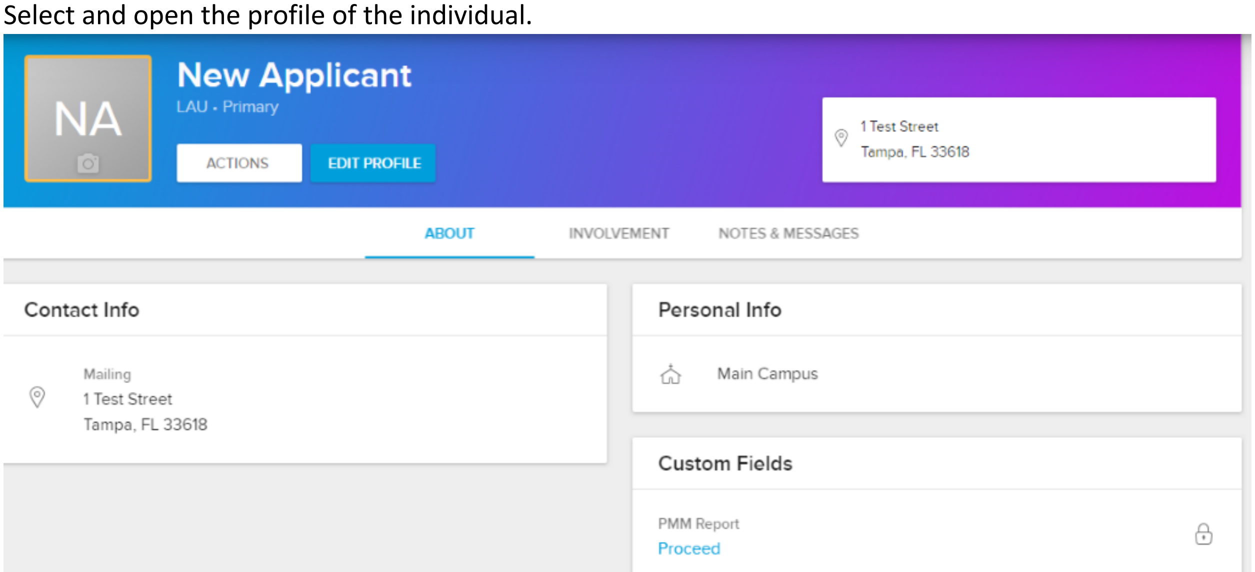
Ordering Background Checks and Child Safety Training

Select Applicant in Pushpay

- ☐ Log into Pushpay
- ☐ Enter the name of the individual in the ‘Search People’ search bar that is needing the background check.



- ☐ Select and open the profile of the individual.

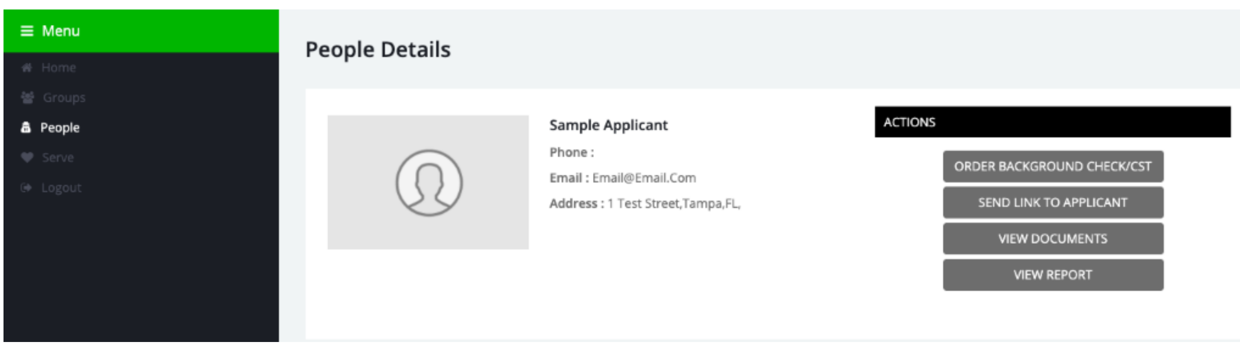


- ☐ Under the “Custom Fields” of the individual, select the option “Proceed” under “PMM Report.”

- ☐ If this is the first time of the day that you are ordering a background check, you will be required to enter your Protect My Ministry login credentials but these are saved for the session. (These credentials were provided to you upon successful completion of your sign-up process or you may have been emailed your username from our system and asked to create your password.)

Select Order Background Check/CST from the Menu

- Select “Order Background Checks/CST” from the Actions Menu on the right.

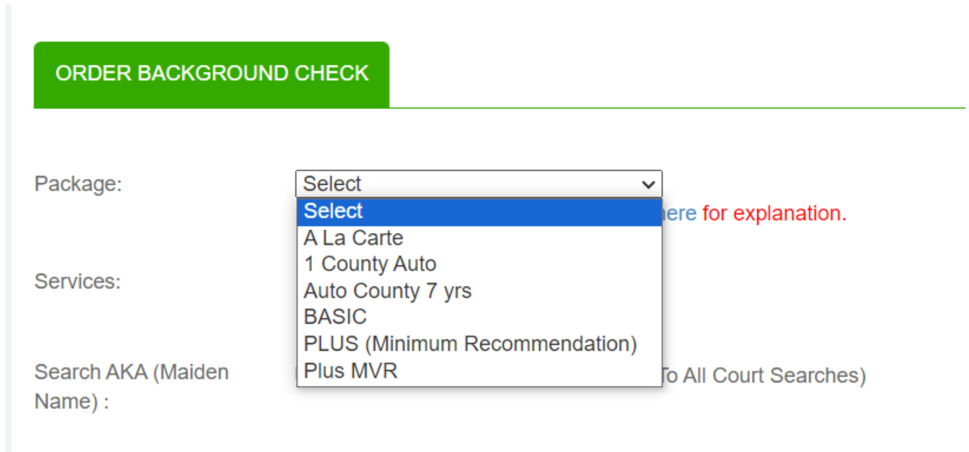


Provide Applicant Details

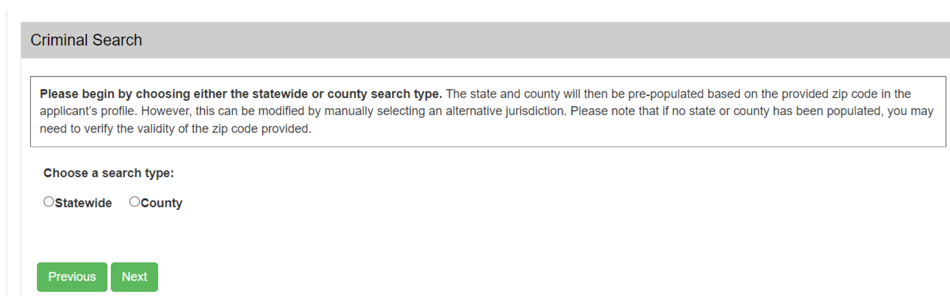
- You will then see a form filled with information from the individual's Pushpay profile. You must ensure that all required information is entered. i.e., SSN (Social Security Number), DOB, etc.

Select Package or Services

- Next you will be taken to the ordering menu (menus differ by account and requested services and packages). You must order a background check to add on child safety training.

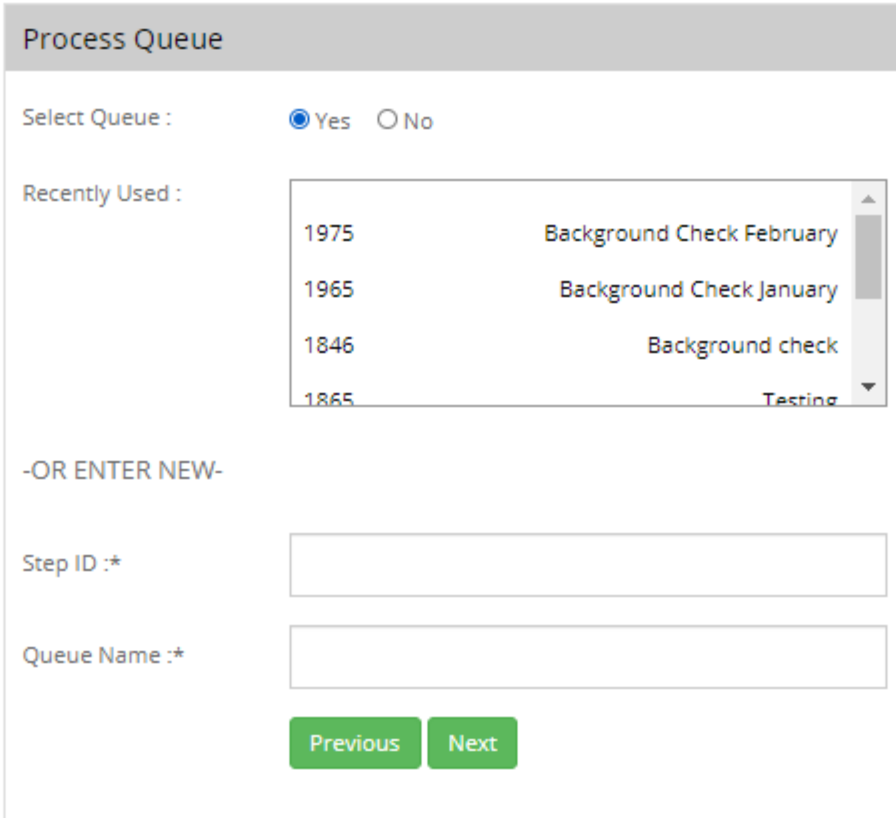


- If ordering the Plus package or any package that includes a court search, you will have an additional page in which you can select the state and/or county for your search.



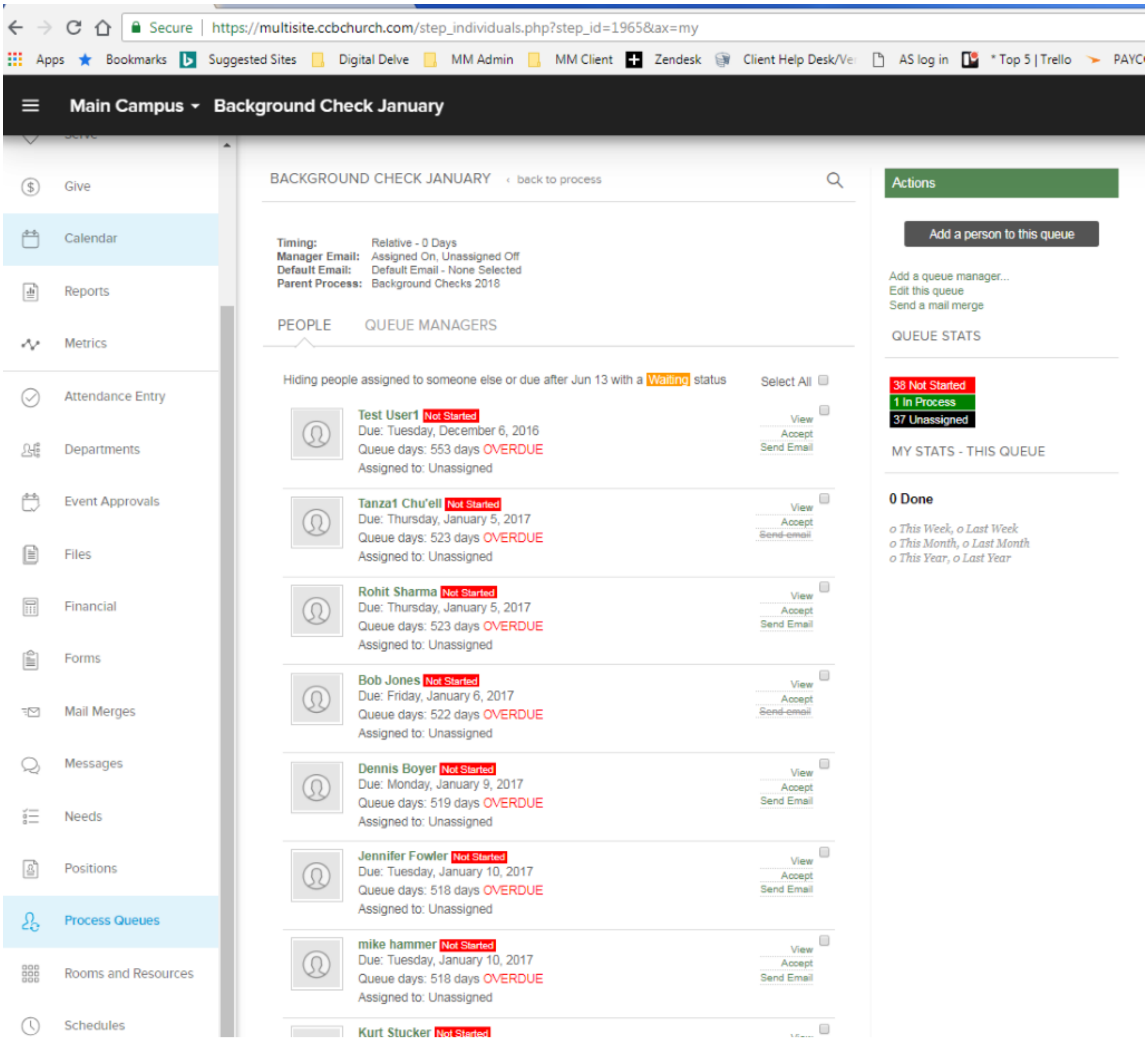
Enter or Select Process Queue

- Process Queue- After hitting “Next” you will be brought to the page where you can select which Process Queue you would like your report to return to. If you have previously entered step IDs for Process Queues, these will be saved and available to select in the recently used drop down field after choosing ‘yes’. Just click on one to use.



For more information on Process Queues and how to create them please visit: https://chms.pushpay.com/s/article/Getting-Started-Process-Queues

Example of a step ID and process queue name: (in this example, 1965 is the step ID and Background Check January is the process queue name). The step ID is found in the URL bar at the top of the page and is the number found after the = following ‘step_id’. Do not enter anything other than that number when prompted for the step ID.



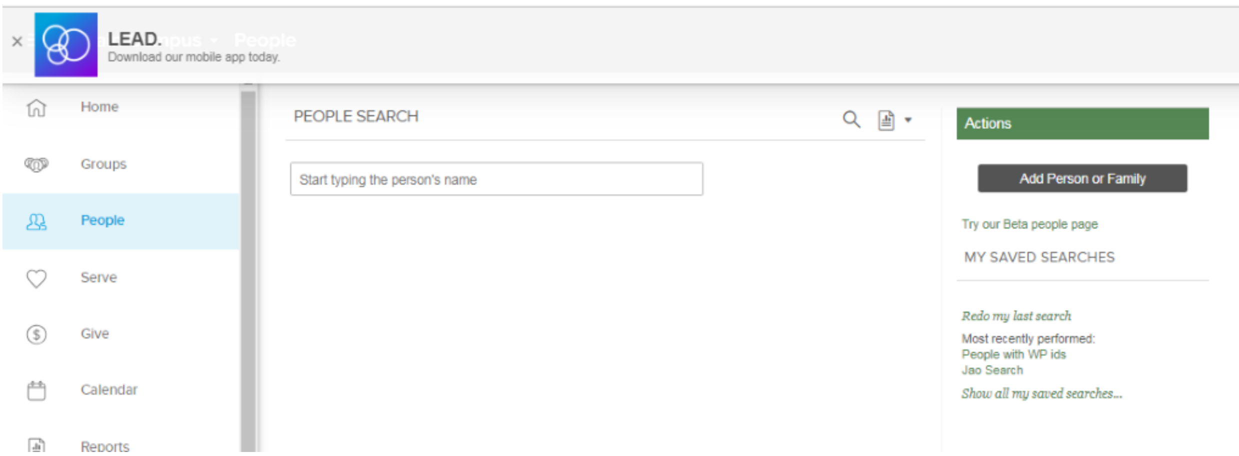
Client Certification

- On the final Summary page, you will see a Client Certification statement. Once read, you must mark the check box to certify that you have the authorization to run a background check.
- Finally, you will hit the "Submit BG Check" button to send the request. Allow 24-72 hrs. for the completed report (some jurisdictions could take longer).

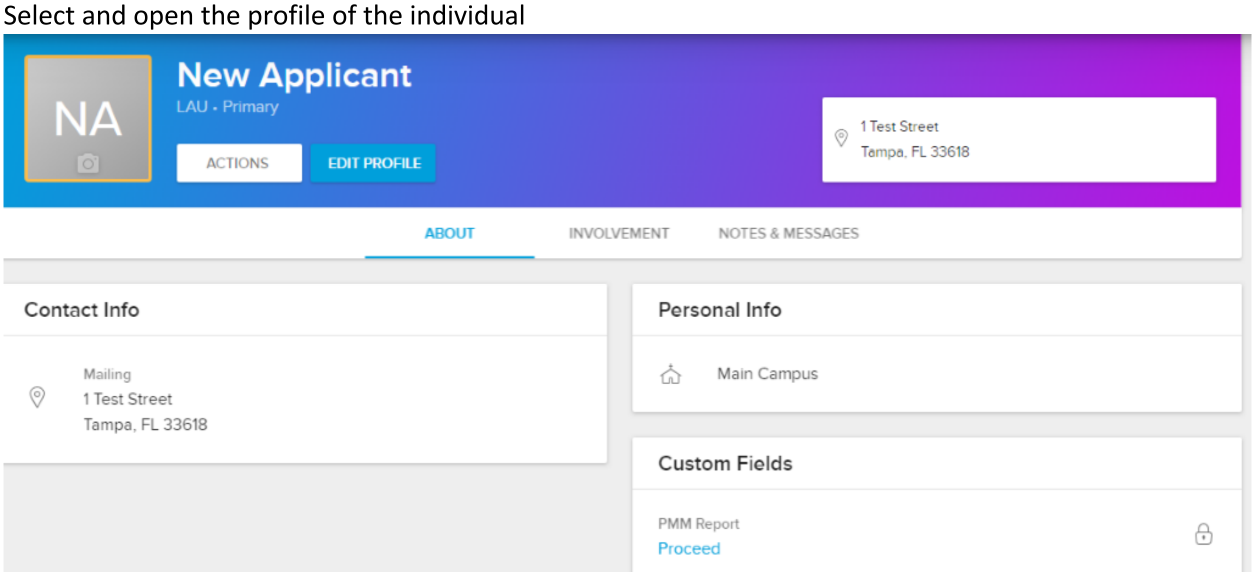
Using Protect My Ministry's Paperless Consent Form (Bundles 2 and higher)

Select Applicant in Pushpay

- ☐ Log into Pushpay
- ☐ Enter the name of the individual in the 'Search People' search bar that is needing the background check



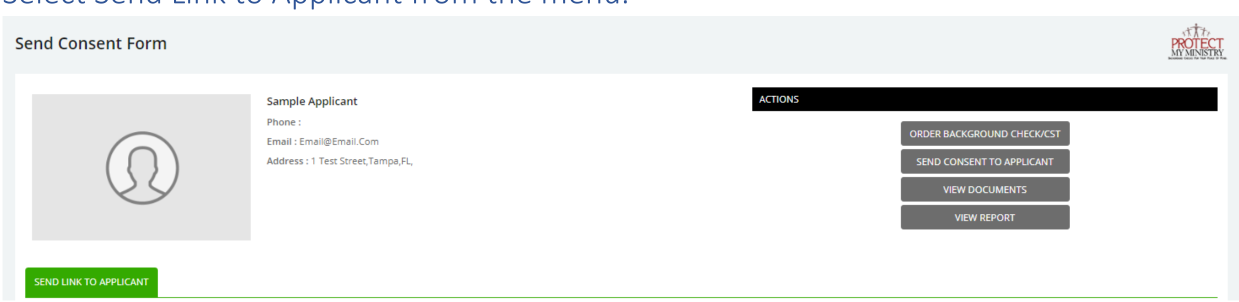
- ☐ Select and open the profile of the individual



- ☐ Under the "Custom Fields" of the individual, select the option "Proceed" under "PMM Report."

- If this is the first time of the day that you are ordering a background check, you will be required to enter your Protect My Ministry login credentials but these are saved for the session (These credentials were provided to you upon successful completion of your sign-up process).

Select Send Link to Applicant from the menu.



- Ensure that at a minimum, the Name and Email address fields are correct.
- Select "Send Link to Applicant."

- Your applicant will receive an email with a link to an online form where they can enter their applicant details and provide their authorization for the background investigation-links are only valid for 7 days. If the link expires and the applicant is still interested in participating, you will need to send a new link by repeating the process.

After Applicant Completes the Online Form

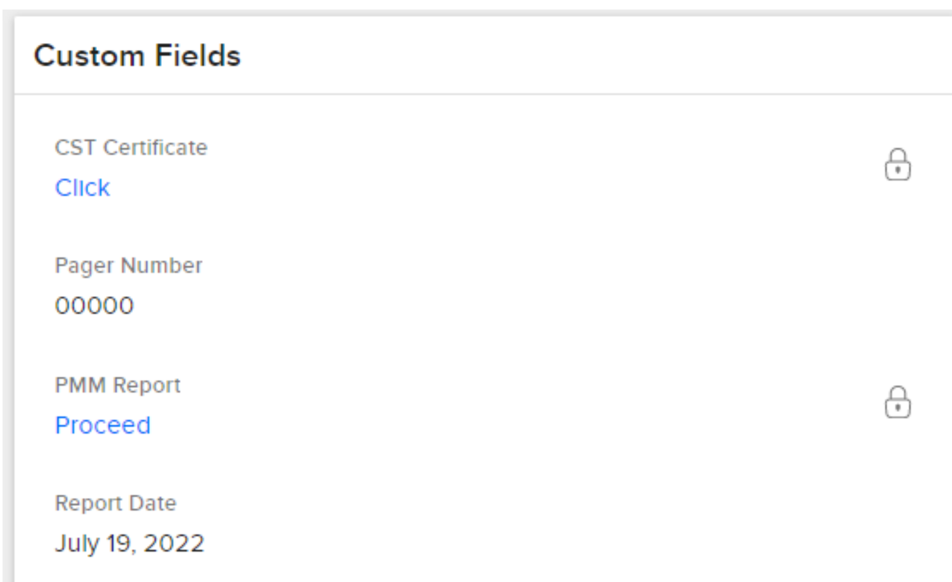
- After the applicant completes the form, you will receive an email letting you know the application was received.
- You will need to log back in to Pushpay and select the "Awaiting" in the applicant's profile.
- You can click "View Documents" to view authorization form or click "Order Background Check/CST" to place an order.

** We do offer an 'auto order' option that will automatically order the background check after the applicant submits their consent. Please contact Protect My Ministry support for more details.

Viewing Completed Reports

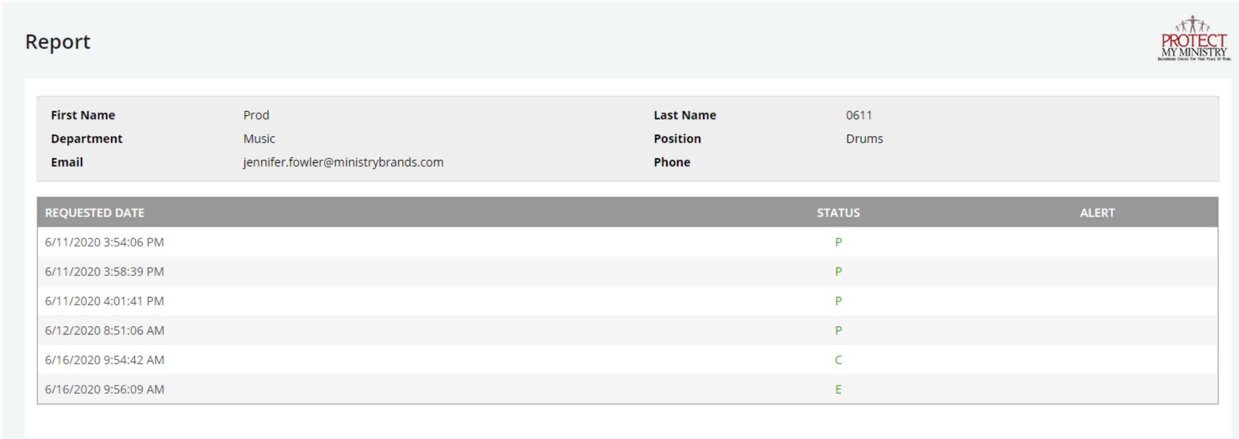
You will be emailed upon successful completion of a background check.

- Log into Pushpay.
- Enter the name of the individual in the 'Search People' search bar who has the completed report to view.
- Click the "Complete" link in the PMM Report field (If training was ordered and completed, there will be a link to the certificate in the CST (Child Safety Training) Certificate custom field. If the link expired, the status will be "Expired".



- Log into the integration and click the 'View Report' tab in the Actions Menu

- All available reports will be displayed. P= pending, E = error and C= complete (for errors, contact customer support). If the report is complete, you can click the “C” to view the pdf of the report.



Report

First Name	Prod	**Last Name**	0611
Department	Music	**Position**	Drums
Email	jennifer.fowler@ministrybrands.com	**Phone**	

REQUESTED DATE	STATUS	ALERT
6/11/2020 3:54:06 PM	P	
6/11/2020 3:58:39 PM	P	
6/11/2020 4:01:41 PM	P	
6/12/2020 8:51:06 AM	P	
6/16/2020 9:54:42 AM	C	
6/16/2020 9:56:09 AM	E	

User Permissions

*The following Settings will all have to be accessed through Ministry Mobilizer.

***Remember you are only accessing Ministry Mobilizer to adjust certain settings, not to place background checks.**

You will need to log into Ministry Mobilizer at the following link: https://mobilizemyministry.com You will be using the credentials that were provided to you in your signup email or that you created. These are the same credentials you use to access ordering from Protect My Ministry in Pushpay.

Some features are only available to certain Bundles.

Create, Delete and Edit Users

First, click the Settings icon in the top right. Next, click User Admin.
You can either select Edit or Delete, next to an existing user, or select New to add a new user.

Notifications are sent to users using the email address in the users’ setup menu. Users are notified when:

- An application has been submitted.
- The background report has completed.
- Child safety training has completed.
- The applicant is under 18 years of age.

Notification emails come from message@mobilizemyministry.com, please whitelist this email address with your email provider. This will keep your notifications from ending up in your junk or spam email folders.

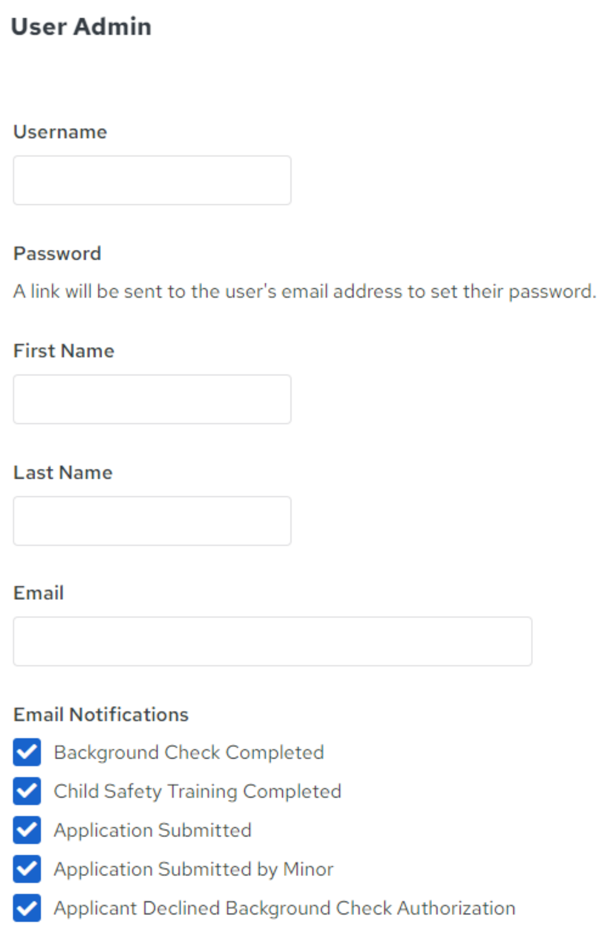
Set permissions for the user by checking and unchecking the boxes.

To deactivate a user, uncheck the Active box or if the user will never need access to the system again, simply delete the user by clicking on **Delete** next to their name and confirming when prompted that you wish to remove them from the system.

**The only permissions that apply to the Pushpay integration are:

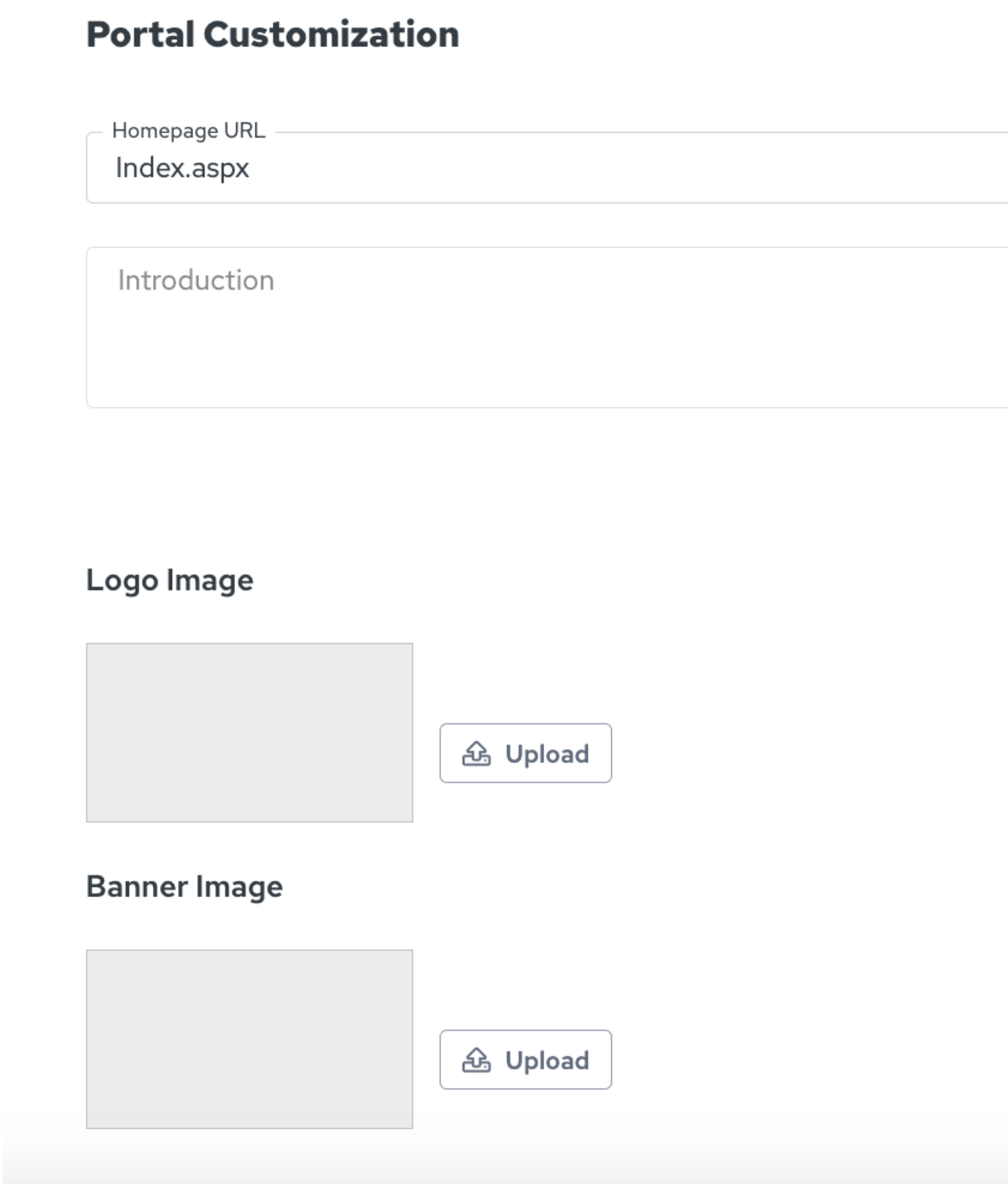
- Allow to View Background Reports
- Allow to Request Background Reports
- Allow to Edit SSN
- Allow to Order Training
- Active

All other permissions levels apply to Ministry Mobilizer usage only and features such as departments will not apply to the integration but are necessary when creating positions in Bundle 4 and email notifications will still be sent if created on the Positions.



Customization (bundles 2 and higher)

From the Settings, select Portal Customization



Logo Image: 2 3 4

Upload your logo to the size of 300-pixel width. This works best in JPEG format.

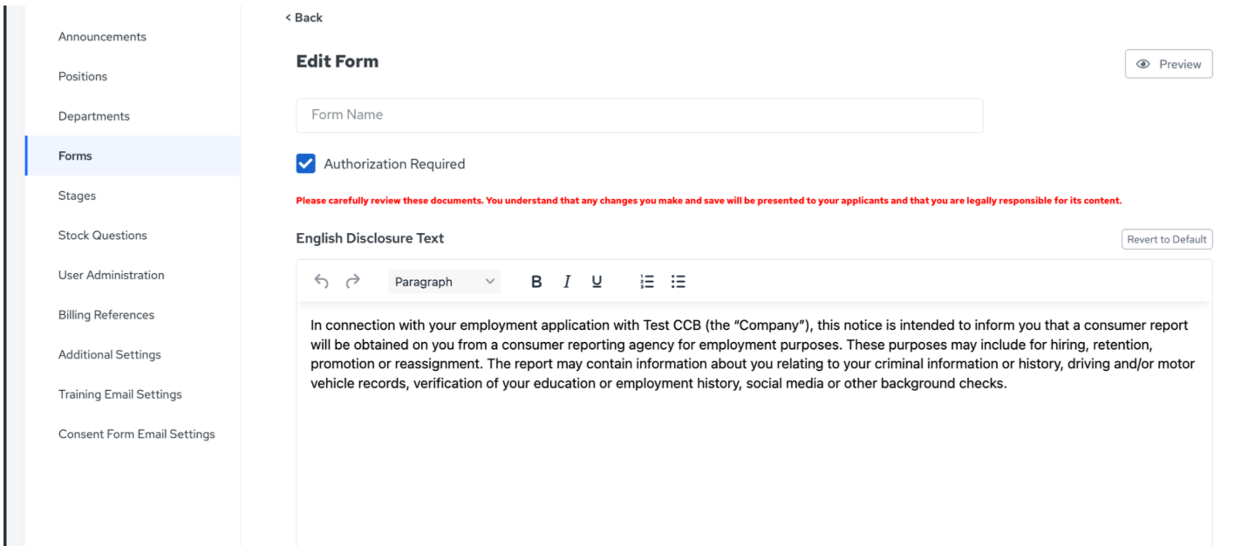
Banner Image: 2 3 4

Upload a banner image, recommended size is 720 x 150.

Creating and Editing Forms 2,3,4

The purpose of the 'Forms' is to allow you to create different applications for individual positions/opportunities within your organization. These different 'forms' can have questions specific to that position/opportunity and can be assigned to different departments so that they are reviewed by the individual responsible for that department. Multiple forms is only available to bundle 4

From Settings, Select
Forms >Edit:



1. Assign a name to the form (Named 'Standard' by default). You can name the form for the position it correlates to (teacher, minister, bus driver etc.) or you can name the form for a type (volunteer, employee, administrator) which allows the form to be used for multiple positions or opportunities. Think through your organization's processes before you begin to save time later! I suggest mapping out your departments, positions etc. and your workflow process to make the system function most efficiently for you. (Departments and Positions are only available to Bundle 4)
2. Check the box "*Authorization Required*" if you want the applicant to be required to submit an authorization to submit their application. This is extremely important if you are not collecting a separate paper authorization for ordered background checks.
3. You can edit the "*Disclosure Text*" *and* "*Authorization Text*", or you can use our default text. Consult your legal counsel. Be sure to check the local, state, and federal laws if you are unsure of the requirements.
4. By checking the "*Require Driver's License*" box, applicants will be required to submit their DL info on their application. You may choose to require this if your organization plans to run an MVR search.

5.Stock Questions (bundles 3 and 4) are questions we have prepared for different areas of the application. Only check the boxes for those types of questions you feel are necessary for the position the applicant is applying to or information you feel necessary to have on file. To see the specific custom questions for each area, you can click on the '*Preview Questions'* link before requiring them on your application. *Note-there is an option in this section called 'Ask Custom Stock Questions' [3,4]- check this box if you plan to add your own custom designed questions for your application such as “Do you have any special talents that could be useful to the position you are applying to?” These custom questions can be created once you hit the “*Save”* button for your form or at any time by going back to the Forms section of Settings. You will have the option to create dropdown, yes/no, short or long answer type questions as well as provide instruction only statements with no expected response.

6. If there are questions you will use in multiple forms, or multiple times in one form, we suggest adding Stock Questions (in the Settings Menu), to simplify the process of creating your application questions. Bundle 4.

8. If you are going to add your own custom questions to your form, click save and then enter those. The custom questions will appear in the order in which they are created. To re-order the questions, use the Place Before option. You can also make the questions required by checking the box next to “*Required?”* at the bottom. You can also hide questions when you no longer want the question to appear on your form (deleting is not an option

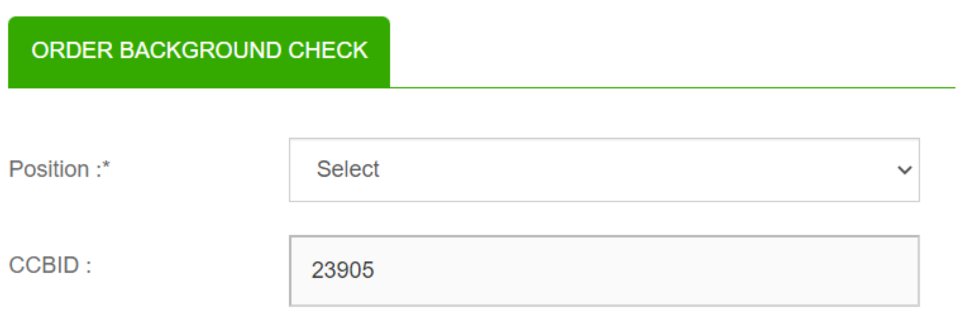
9. Once your Form for your position is complete, you may preview the form by clicking on the “*Preview”* tab at the top of the Form page. After reviewing your form and making any necessary changes, you can go to the *‘Positions’* section in Settings and choose the position that this form belongs with. Select the form from the dropdown choices (Bundle 4).

Consent Form Email Settings (Bundles 2, 3, 4)

You can edit the email that is sent out to your applicants when you “Send Link to Applicant.” When editing the Email Body be sure to include the proper tags.
If you want to change the where the email comes from, be sure that your email server is set to allow relaying or emails will not go through.

Applicant Merging

We now display the CCB ID of the applicant in Ministry Mobilizer that corresponds to your CCB applicant profile. Please confirm these IDs before merging applicants and be sure to keep the profile that has the most current background check report and consent form when merging. Please contact us before merging with any questions. To confirm the CCB ID Protect My Ministry has on file for an applicant, click the PMM Report link in their profile, log in and go to Order Background Check menu. The CCB ID will be displayed beneath the Position drop down.



For any assistance or questions about your account, please contact Client Services at 800-319-5581 or email support@protectmyministry.com .

Our support team will need the following to assist you:

Account Name, Billing Address and Phone Number

Admin person on the account we are authorized to speak to regarding this issue. If you are not an admin on the account but an active user, we can speak with you. If you are not an active user, the administrator will need to submit the ticket and give us permission to discuss the issue with you.

The CCB URL for your church that you use to log into Pushpay

Example https://multisite.ccbchurch.com/goto/login

Applicant Name (if there is an issue with an applicant)

Applicant CCB ID (this can be found when viewing an applicant profile and recording the numbers at the end of the URL – Example https://multisite.ccbchurch.com/goto/individuals/23905 23905 is the CCB ID

Ministry Mobilizer Applicant ID –to locate this ID:

- Go to the applicant profile in Pushpay.
- Click on Edit.
- Click on the Admin tab.
- Scroll down to the custom fields and look at the URL for the PMM Report field.
- You can copy and paste the entire URL Example Completed (the Ministry Mobilizer ID is the number after aid=)

Description of the problem you are having as well as any error messages or screenshots you can provide to help explain the issue.

October 17, 2023