

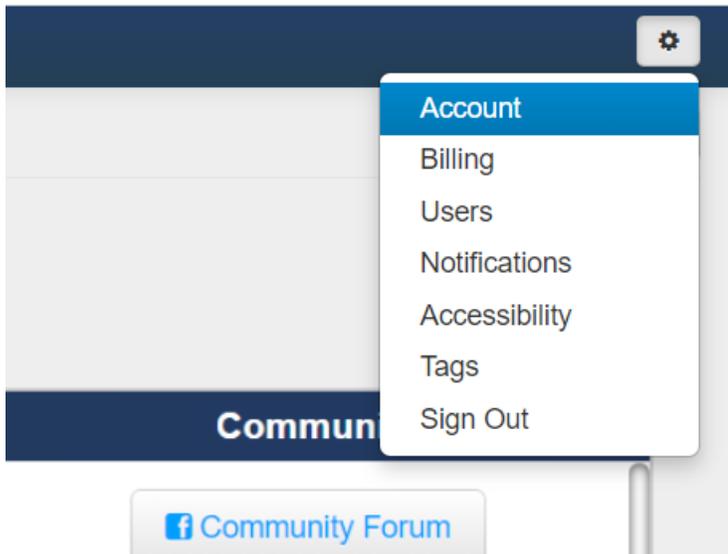
Protect My Ministry

Background Checking Service™

Churchteams Integration Guide

Step 1 – Setting up your account with Protect My Ministry.

- Login to Churchteams (must be an account with Financial Admin access)
- Click the Settings menu and then select Account



- Click the Sign Up button (as shown below) and complete the registration page to setup your Protect My Ministry account. If you are an existing Protect My Ministry customer be sure to denote that you are already using the system.

Protect My Ministry - Background Checks



Step 2 – Entering Protect My Ministry settings in Churchteams

- When your Protect My Ministry account is ready for use you will receive an email with your Organization ID and password which are entered into Churchteams to enable the integration
- Login to Churchteams (must be an account with Financial Admin access)
- Click the Settings menu in the upper right and then Account.
- At the bottom in the Protect My Ministry section click the Link / Connect button
- Enter the Organization ID and password you received from Protect My Ministry and your full name and email address (or the person who is the primary contact for background checks) and click the green Save button. The Background Check Security level allows you to control which type of Churchteams users are allowed to view and request background checks. You are now ready to request background checks from within Churchteams.
- In addition this settings page allows you to access the Administration page for your Protect My Ministry account and this is only available for users at the Financial Admin security level. Click the blue button to access the administration page in Protect My Ministry. Generally you will not need to access this in the normal process of requesting and view background checks but it is available for viewing billing information etc.

Protect My Ministry Information

Organization ID assigned by Protect My Ministry <input type="text" value="12345"/>	Password assigned by Protect My Ministry <input type="password" value="*****"/>	Full Name of Protect My Ministry contact from your organization <input type="text" value="Boyd Pelley"/>	Contact Person Email Address <input type="text" value="boyd@churchteams.com"/>	Code for Auto Order <input type="text" value="ABCD"/>
Request Background Check Security Level <input type="text" value="Small Group Administrator"/>	View Background Check Security Level <input type="text" value="Small Group Administrator"/>	Disable background check buttons <input type="checkbox"/>		

[Protect My Ministry Account Administration](#) - use this button to access your Protect My Ministry account

Save

Cancel

Step 3 – Request a background check

- Search for a person in Churchteams that needs a background check and click the Request button in the Background Check field.

The screenshot shows the Churchteams member profile for John Barclay. The page includes a navigation bar with options like Groups, Members, Reports, Communicate, Check-in, and Contributions. The profile section features a photo of John Barclay, his contact information (phone: (817) 320-4112, email: churchteams@gmail.com), and a 'Background Check' section with a 'Request' button. To the right, there is a 'Barclay Household' section with a photo of the family and a list of household members:

Name	Role	Mobile	Work	Email
John Barclay (Churchteams)	Adult	(817) 320-4112	(817) 111-1111 x342	churchteams@gmail.com john@churchteams.com
Julia Barclay	Adult	(817) 320-4112	(817) 000-1111	churchteams@gmail.com juliab@churchteams.com
Jim Barclay	College Age	(817) 320-5223		jimb@churchteams.com
Jenn Barclay	Student			boyd@churchteams.com
Jake Smith	Child			Jakebar2k2@gsnail.com julieb@churchteams.com

Below the household list, there is a 'Related to' section showing relationships with Sammy Barclay (Son) and Bobby Garrett (Nephew).

- The following page will be displayed and information from Churchteams will be pre-populated in the request. Complete the page and click Submit.

The screenshot shows the VeritySecure background check request form. The form is titled 'Confirm Details' and contains the following fields:

- First Name: John
- Middle Name: (empty)
- Last Name: Barclay
- Email: (empty)
- Date: 3/24/2015
- Other Names Used: (checkbox)
- Social Security: (empty)
- D.O.B.: 6/30/1962
- Sex: Male
- Ethnicity: Select Ethnicity
- Phone: (817)000-1111
- Drivers License: (empty)
- DL State: Select a State
- Addr. From: (empty)
- Street: 6702 Fox Glen Dr
- City: Arlington
- State: Texas
- Zip Code: 76001

The form includes a 'Send Link To Applicant' button and a 'Submit' button at the bottom.

- The background check will be initiated and you will be emailed when it has been completed and can be viewed. When that email is received you can login to Churchteams and search for the person again click the View button in the Background Check section.
- The report will be displayed in a new window for your review and if you have a custom member attribute to track the date of the last background check you can edit the member information and update that date.

Step 4 – Create a volunteer registration form with background check (optional)

- If you want you can create a registration form in Churchteams that will take some information and then send the person to the application page for Protect My Ministry to complete the background check form.
- The first step in enabling this would be reaching out to Protect My Ministry and requesting that they setup this option for you. They will give you a code that needs to be entered in the “Code for Auto Order” field under Settings / Security / Background Checks. Once this is setup you can create your registration as described below.
- To do this login to Churchteams and click the gray Groups menu and select Create to make a new registration group. You can call it whatever makes sense for how you plan to use it for example “Volunteer Background Check” or something similar. Placing the people who should get notified when someone completes the registration for this group as Leaders in the group means they will automatically get emailed when people register.
- Once the group is created you can go into it and click the blue Edit button and select Registration Settings . A page with the following options will be shown. It’s best to enter a “**Registration Completion Message**” like the one shown so that they are clear that after the Churchteams registration they will be taken directly to the Protect My Ministry page and they need to complete that as well. Be sure the “**Registration Completion Option**” is set to “Background check form”. Also un-checking the “**Allow multi-person registrations**” is important as each applicant would need to register separately. Lastly the listing of Registration attributes in blue at the bottom should contain any questions you want to ask them but should at least contain name and email. If you add the Birth Date (Member) field and require it then what they enter in that field will be passed through to the Protect My Ministry form so they don’t have to enter that twice. The same is true of their name. Be sure to click the Save button at the bottom

Registration Completion Message

Thank you for your interest in volunteering! You will now be taken to the background check application so please complete that form.

Default Church Member Type **Default Family Role**

Registration attributes:
These will auto-populate the group view creating a dashboard to manage this event.

Select registration attribute

First Name [Required]

Last Name [Required]

Email (Member) Required

Birth Date (Member) Required

Registration Completion Options Allow multi-person registrations

Send registrant to a website / link

Childcare / secondary registration

Prayer request/note feature

Background check form

Registration History Display

Current Registration

All Registrations



- Finally on the same Registration Settings page copy the green link at the top of the page and place that on your website where you will be directing volunteers to register.

Need help or have questions?

Contact us at support@churchteams.com or call 817-405-9750.