



11/18/2021

# Protect My Ministry & ParishSoft



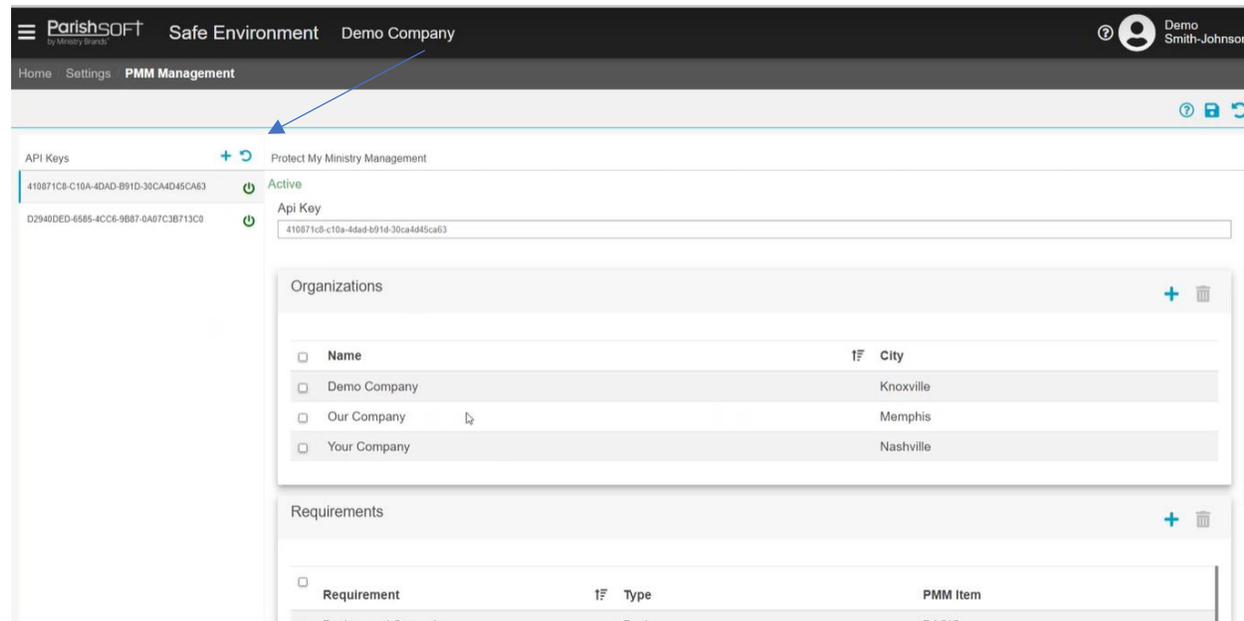
Andrew Haystead

ITALICS SUPPLIED BY JENNIFER FOWLER

# Protect My Ministry Workflow within SEP

## Setup and Config

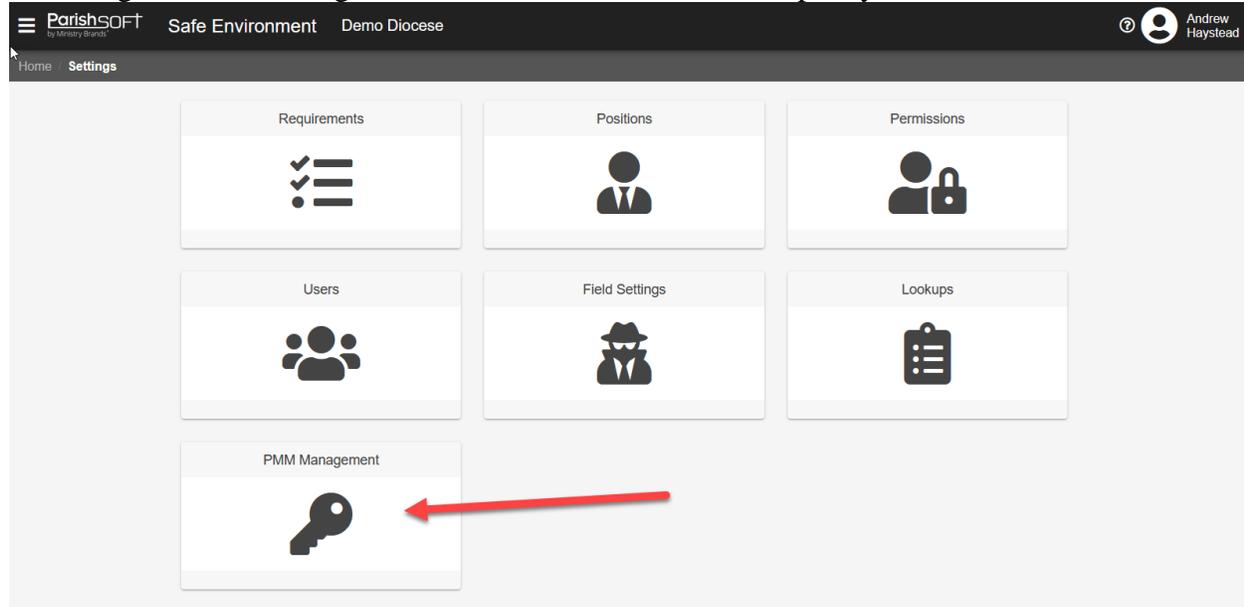
1. Customer signs up with PMM and configures PMM account. (*Home>Settings>PMM Management*)
  - Customer selects which PMM packages they will use (*once sales or support establishes the packages, support will enable those packages in the customer account on the MM side for use by the PS integration. If the packages change at any time, the customer can use the refresh option on the PMM Management page where their api keys and requirements are found*)



- Customer selects if they will use PMM Adjudication process or not. If yes, customer works with PMM to define Adjudication criteria. (*If risk assessment is requested through the sign-up form, customer will work with Compliance dept on establishing criteria. However, the only accept terms are “Accept” and “Pass”. All others will be seen as failures and require manual review.*)
- Customer brands PMM login page (optional) (*If desired, customer can provide support/sign up team with logo or banner to upload in their corresponding PMM account*)

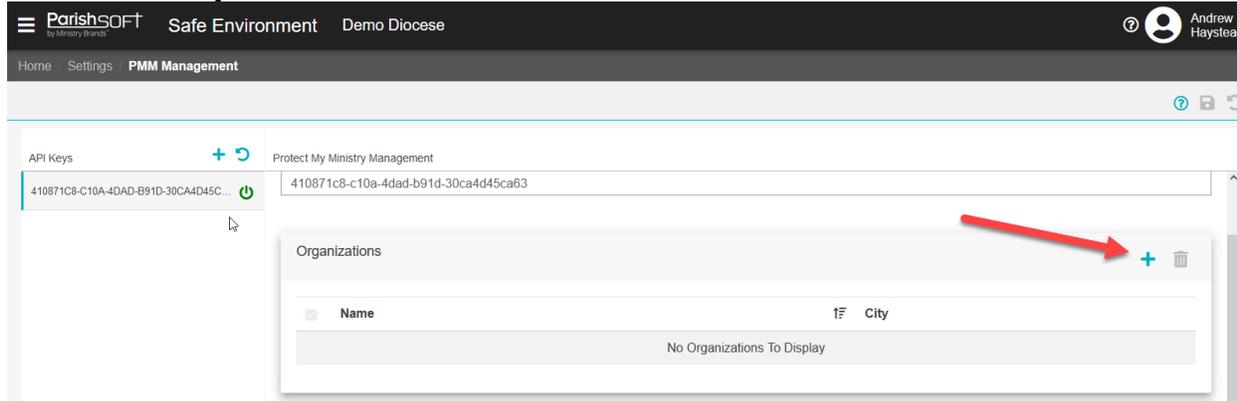
2. Customer configures SEP-PMM integration in SEP.

- In Settings > PMM Management, customer adds their PMM api key.



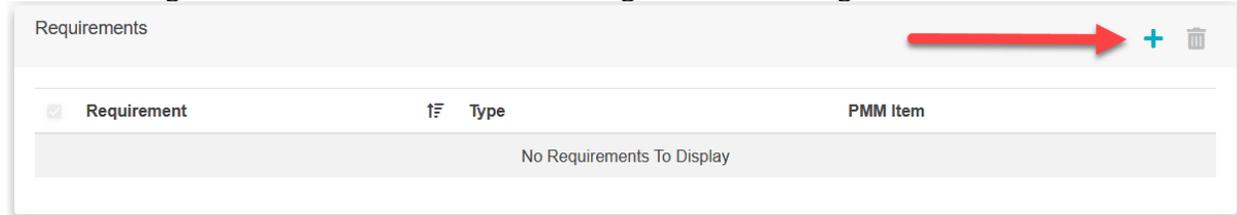
This can be one API key that will cover all organizations in SEP (for example if the diocese is paying for all parish/school screenings sent to PMM), or each organization can have their own API key (for example if each parish/school is paying for their own screenings sent to PMM). (Each MM Account that gets an API key needs a Digital Delve api user/pw for ordering and invoicing)

- After API key is saved, customer selects the Organization(s) that are associated with this API key.



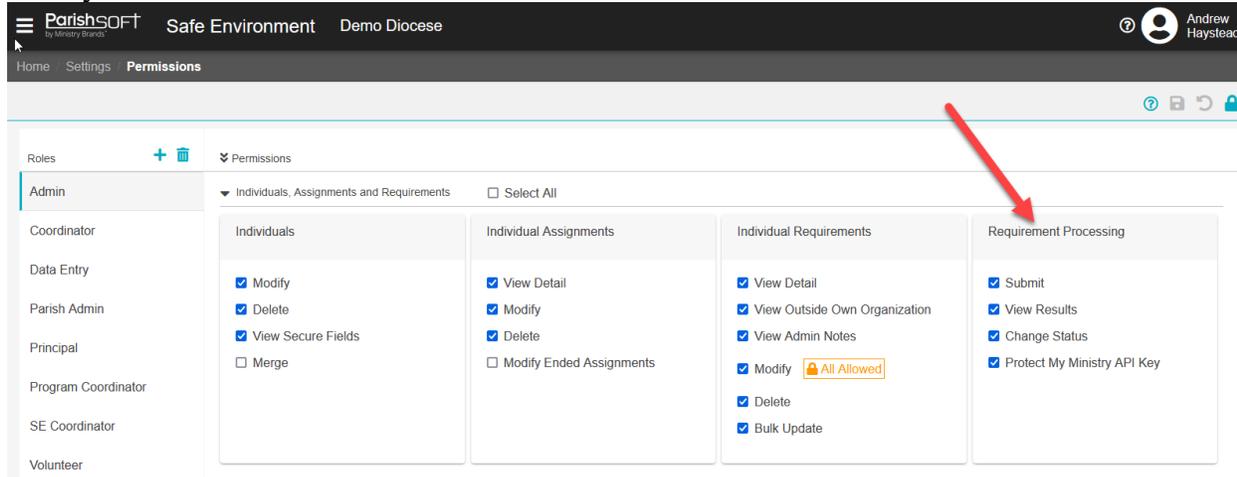
This can be just a single organization, a group of organizations within the diocese, or all organizations within the diocese. This will allow the customers to accommodate the various arrangements within the diocese, such as the diocese paying for all screenings or each parish/school paying for their own screenings.

- After Organization(s) are selected, customer associates SEP requirements to PMM Packages or a la carte items, still in Settings > PMM Management.



3. Customer configures PMM access rights in Settings > Permissions > Requirement Processing, as needed for each permission Role.

- Permission Roles are assigned to each user to control their access levels in the SEP system.





2. User selects No in Process Manually? field (Yes is disabled for now, in future will allow users to submit to the PMM Registration system where the applicant will be responsible for adding in their identifying info to the PMM registration page), then clicks the submit to PMM icon. (Assuming user has been given permission to submit screenings to PMM in SEP permission setup).
  - If Process Manually? was No, SEP sends the requirement data, along with relevant applicant data and customized invitation text, to PMM. PMM generates the requirement record in the PMM system. Response from PMM system is provided to SEP to confirm receipt of requirement submission. SEP changes Status of requirement based on the following possible responses:
    1. Result Delayed: "Pending Applicant"  
  
Failure: "Hold"
  - If Process Manually? Was Yes (as noted above this is future functionality, and may be implemented different than described here), a new browser tab is opened with PMM login screen. After user logs in, user sees the PMM manual screening processing page. User makes needed screening selections and generates screening in PMM system. PMM system provides SEP data on requirement submission. SEP changes Status of requirement to In Process to show that screening work is being done on the PMM side.
3. Screening completes in PMM system.
  - SEP changes Status of requirement based on the following responses:
    1. Success without Adjudication: "Review Needed"  
  
Success with Adjudication Pass: "Completed"  
Success with Adjudication Fail: "Hold"
  - If customer is using PMM's Adjudication process, PMM classifies the screenings as Pass or Fail, and provides updated screening data to SEP. SEP changes Status of the Requirement to Completed or Hold and displays URL link to PMM screening report. (Visible only to those users who have been given permission to view PMM screening results in SEP permission setup)
  - If customer is not using PMM's Adjudication process, PMM provides updated screening data to SEP. SEP changes Status of the Requirement to Review Needed and displays URL link to PMM screening report. (Visible only to those users who have been given permission to view PMM screening results in SEP permission setup).
  - SEP stores link to report so if report changes, link will always reflect current report
4. Customer with appropriate PMM permissions in SEP (View Result & Change Status) reviews the requirement to see the results from PMM, and if not using PMM's adjudication services, manually sets the Status of the requirement to Completed or Hold based on their organization's policies. *(Note-PS does not currently have a background check dashboard or other way of notifying users of completed reports. May want to consider setting them up as carbon copy users in DD to be emailed on completed reports)*

***Packages and Services Available (only direct order at this time and no online form through PMM API)***

*Basic*

*Basic MVR*

*Basic Drug*

*1 County Auto*

*Auto County 7yrs*

*\*No a la carte testing has been done as of 11/18/2021*

*What happens if customer adds to a completed report or applicant disputes a report and we send an updated version? Please email customer so they are aware. PS does not have any notifications in place yet.*