PROTECT MY MINISTRY AND PLANNING CENTER

November, 2023

Contents

Account Set Up

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

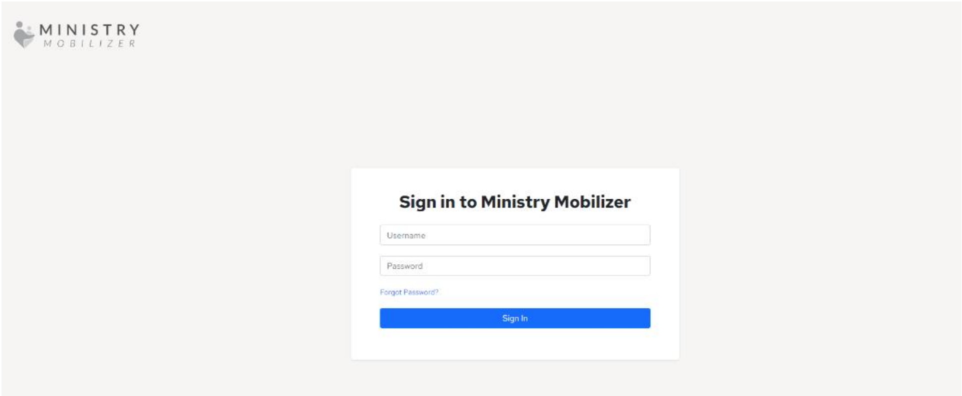
**If you would like Protect My Ministry to deliver your results to the Background Check badge in Planning Center, please read the following:

- Updating the Background check badge in Planning Center requires adjudication.
- Adjudication is a feature that is applied to your account where a Background Check report will be marked Clear if no records are found. All other Reports will be marked Needs Review. **This is an optional add-on feature.**
- If this feature is turned on, Adjudication global will be a global setting applied to all Background Checks submitted.
- If adjudication is configured with Protect My Ministry and the background check is returned:
    - Clear - the Background Check badge in Planning Center will be marked Clear. A link to the report will be present.
    - Needs Review or any other status - the Background Check record in Planning Center will be marked Not Clear (this means review and assessment is needed by your background check administrator) and a link to the report will be present.
- Submit a ticket to compliance@protectmyministry.com requesting to have risk assessment added to your account and mention that you use Planning Center terms Clear/Needs Review.

***Protect My Ministry does not currently work with the "Add background check" button in Planning Center for ordering. You will need to place orders from our Ministry Mobilizer.*

Log in to Ministry Mobilizer

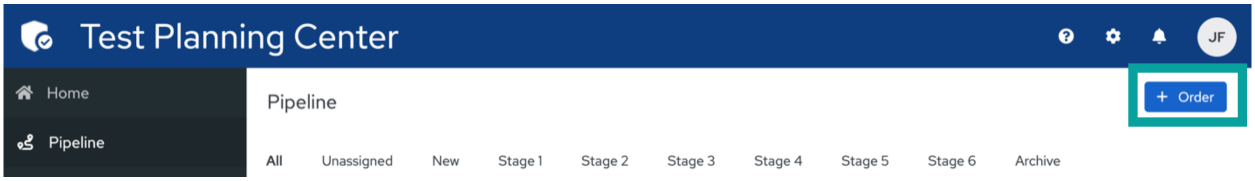
Log in to Ministry Mobilizer with your MM (Ministry Mobilizer) credentials -do not enter your Planning Center (PC) credentials here.

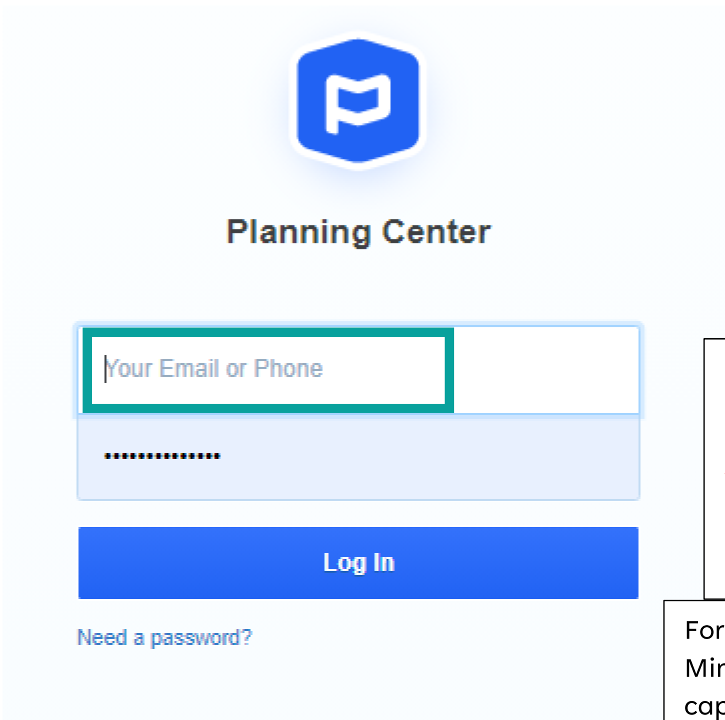


You will arrive at our Home Page where you will find links to our Ministry Mobilizer user guide, helpful resources and access to compliance forms and documents.

Authenticating your PC Account

To connect Ministry Mobilizer (Protect My Ministry) with your Planning Center account for the first time, click '+ Order' from the Pipeline or the '+ Background Check' option in Background Checks. You will be prompted to enter your Planning Center account credentials. You must be an admin user in PC to synchronize the account correctly with PC. Do not create child users who do not have admin or manager permissions with access to create/edit notes or your notes will not update in PC correctly.





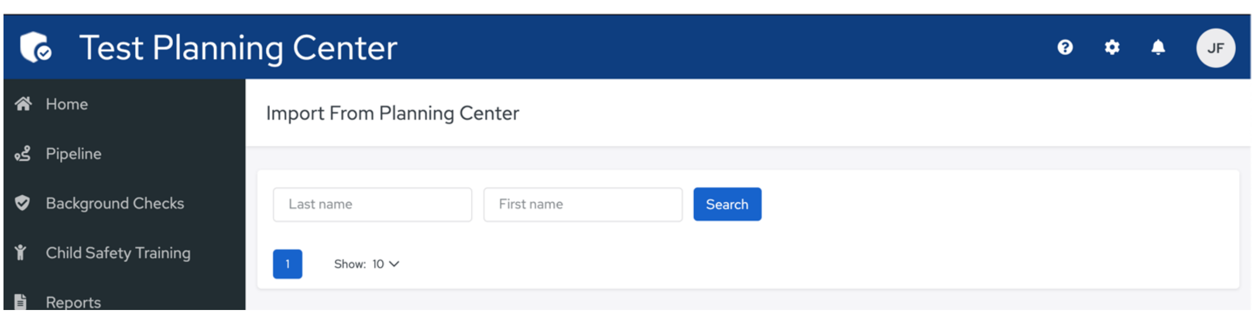
Entering your PC credentials will allow us to connect to your Planning Center account. You must be an admin or manager with edit/create note permissions.

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 the import process or the results will not return to Planning Center.

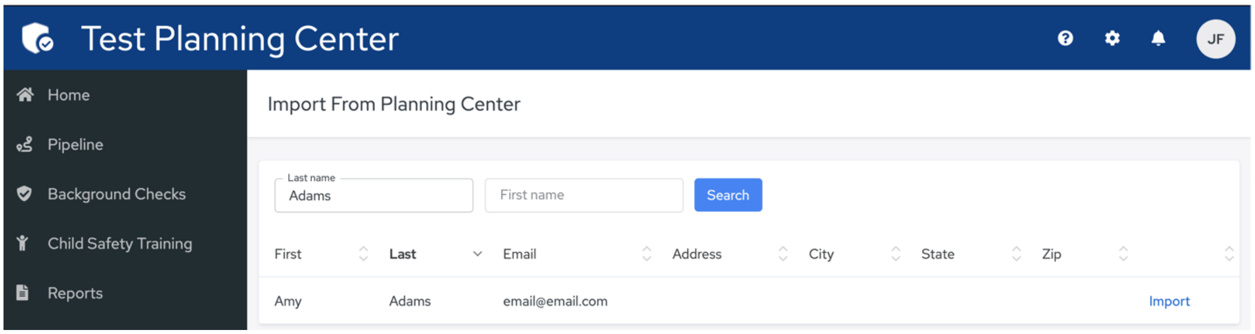
Your account is now connected. Periodically, you will be prompted to allow Protect My Ministry to continue connecting with your Planning Center Account. This is normal and to be expected every 90 days (about 3 months).

Using Electronic Consent Forms (Bundle 2 and higher)

- Go to Pipeline, + Order and search by 'exact' last name/first name for the applicant you wish to import. We are not able to search by partial names unfortunately so if you spell the name incorrectly, it will not find them.

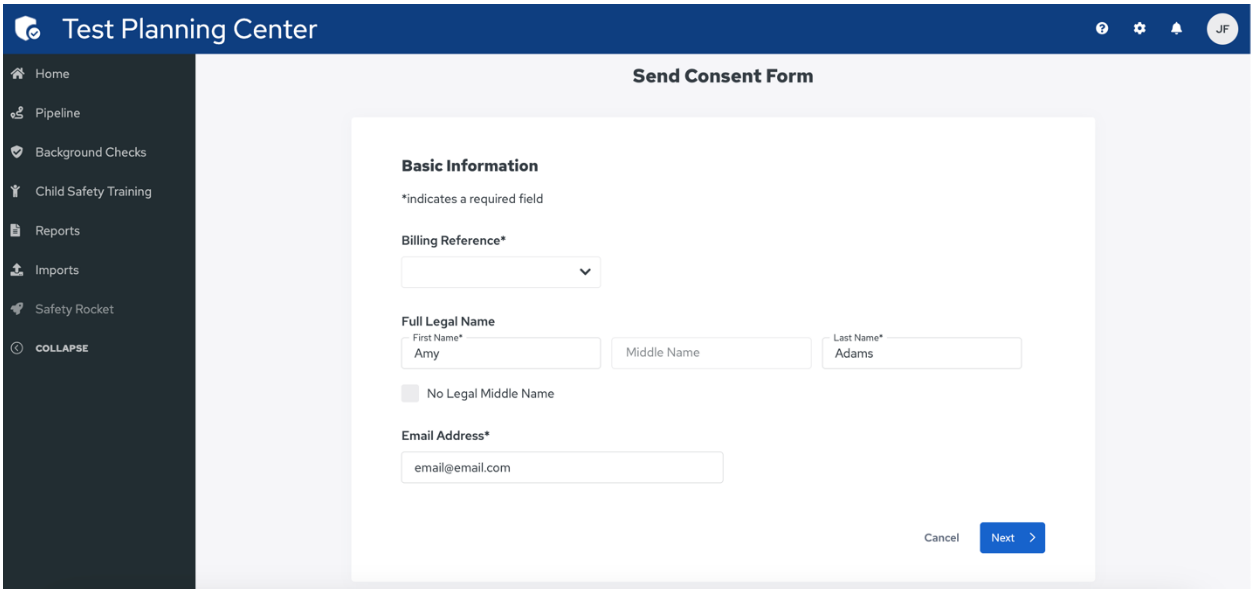


- If your applicant is found, their information will appear, and you will have the option to import them.
- If the applicant has already been imported previously, you will see the “Order” link instead of “Import”. Clicking the “Order” link will then give you the option to send the consent form email.

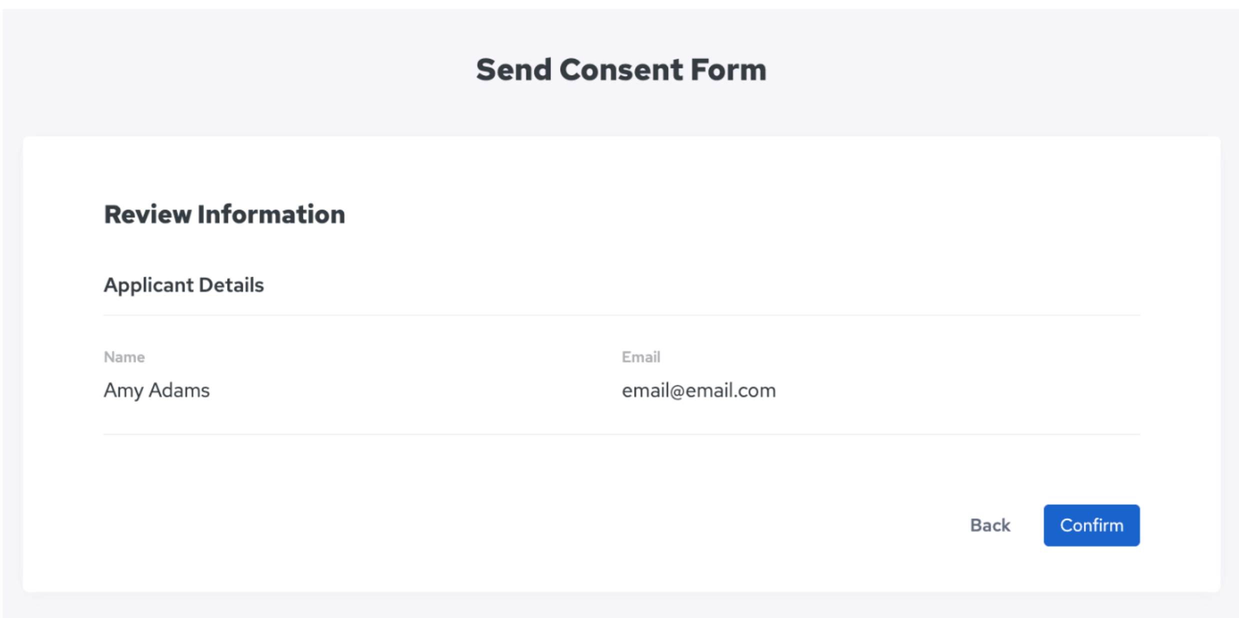


- Clicking the ‘Import’ link will then ask you what you would like to do. Select “Send Consent Form”. (You can also save the applicant to your Pipeline and later send the consent form to multiple applicants after importing all of them.) **Note**If the applicant name you are searching for matches more 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.

- Supply any missing information and click ‘Next’



- Review one last time and confirm.



- Applicants 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 “From Email” field unless you are familiar with creating an SPF record to allow us to send email on behalf of your organization. Also do not remove any information shown in brackets. Those fields and their brackets need to remain.
- Return to your Pipeline where you will see the applicant in your account.

Test Planning Center is considering you for an opportunity.

M 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

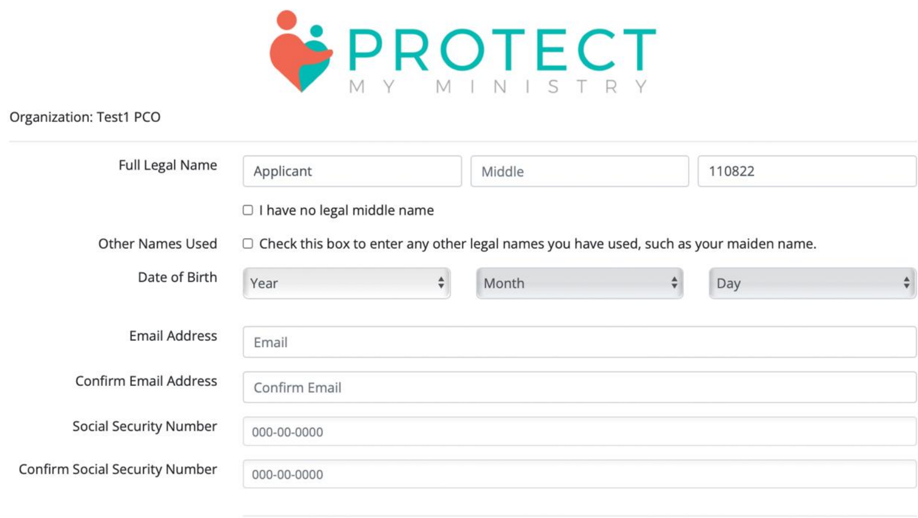
- Once the applicant submits the online form, you will receive an email notification if your user has notifications enabled. To confirm your user email settings: Settings>User Administration>Edit>Check the boxes for all email notifications desired>Save.

New mobilizemyministry.com Application

M 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 organization's logo or banner. Settings>Portal Customization

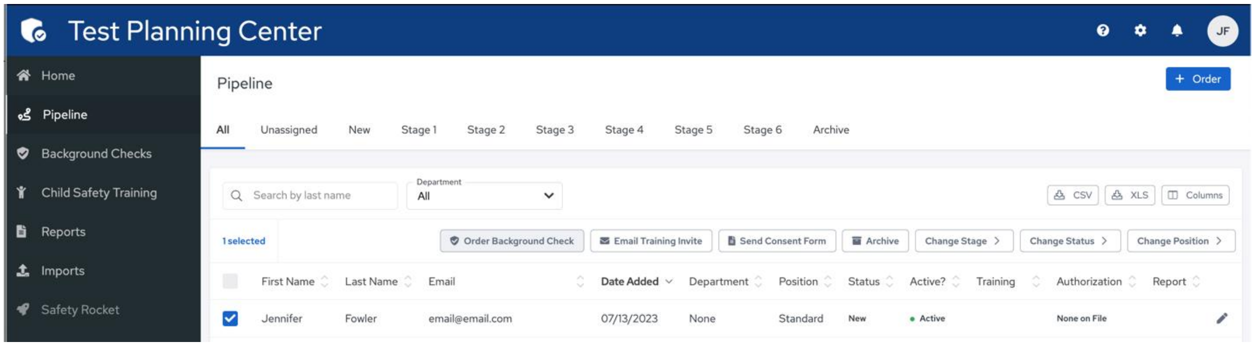


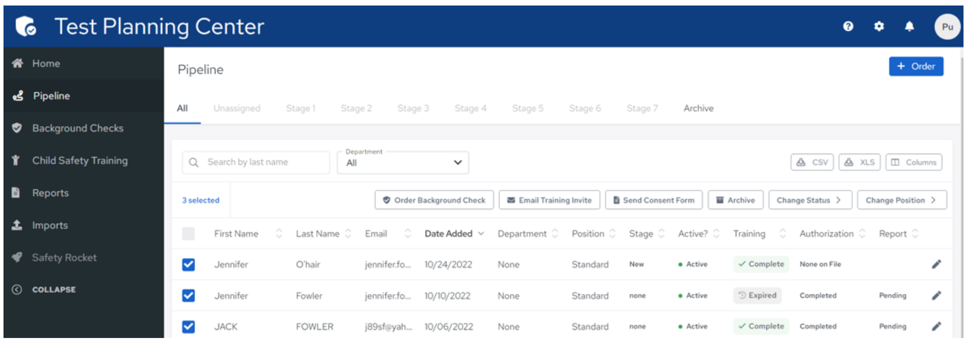
Auto Order Background Checks

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: Settings>Additional Settings and click "Download Release Form". Complete the form and email it to our Customer Service team. They will let you know once the set-up is complete. You will still be notified upon receipt of each application as well as when the report is completed.

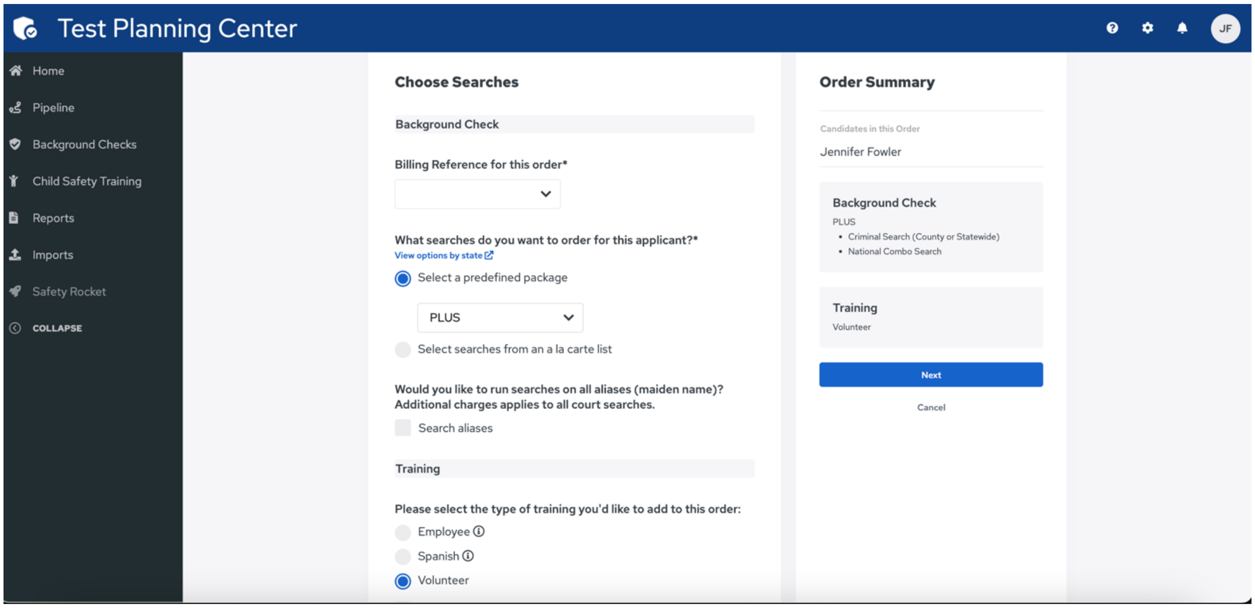
Order Background Checks after using electronic consent form.

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 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 above the applicant's table. 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. Do NOT send out the public link found in your Account tab (Registration Link). Using that link will not allow for results to be posted back to Planning Center.

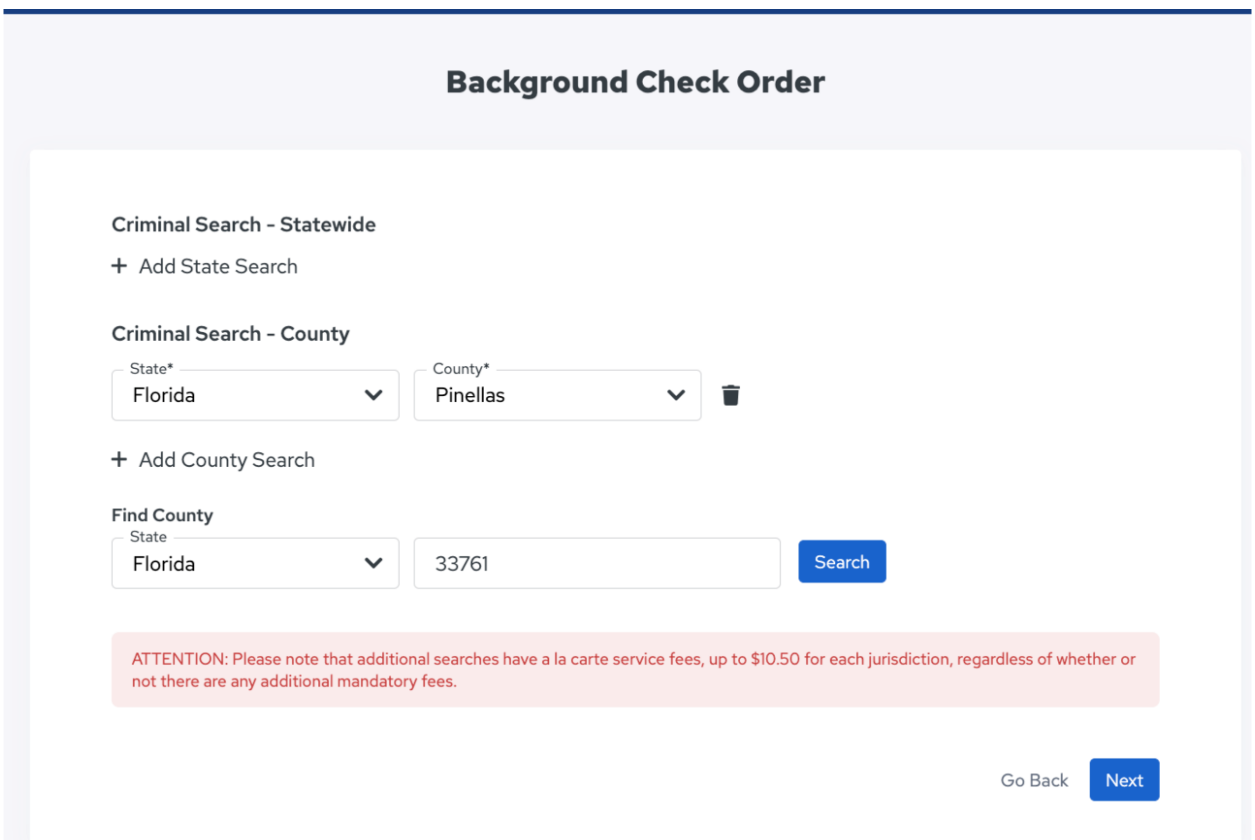




- If you want to use billing references for your orders so that accounting can subtotal your invoices by billing reference, you can add them here: Settings>Billing References>+ New Billing Reference (50 char max).
- Select the package from the drop-down menu and check the box to add alias names if desired. 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 training completion, and a link to this certificate will appear in their PC profile too. As with the online form, you may customize this email as well. Training statuses are Invited, Complete and Expired (links expire after 14 days).

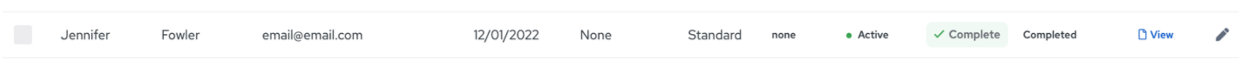


- Complete the jurisdiction selection on the next page if needed for your package.



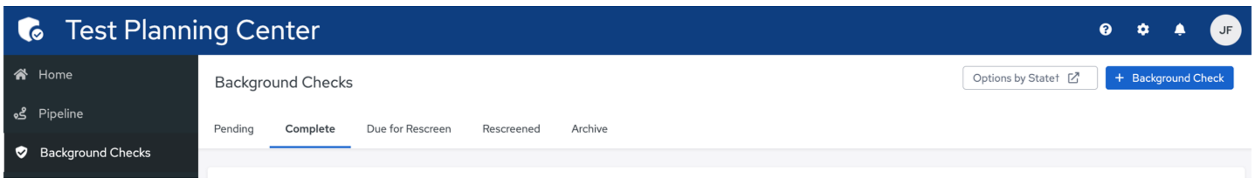
- Complete the FCRA (Fair Credit Reporting Act) Client Certification and click Order.

- View of Pipeline once report and training are both complete.



Order Background Checks without online consent form

If you are <u>not</u> using our electronic consent form, you may start a new order by going to Background Checks> + Background Check

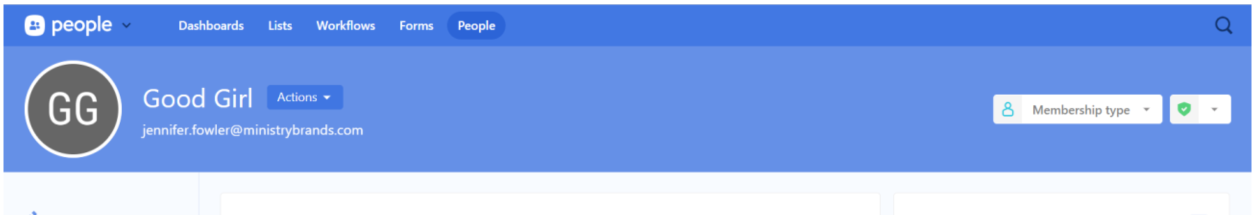


- Filter/Search for your applicant and click import.
- Complete the required fields (first/last name, SSN (Social Security Number), DOB, Email and State).
- Click Next.
- Select package from the drop-down menu and add training if desired; if your order requires additional information, you will be asked on the subsequent pages.
- Certify order on final page and submit.

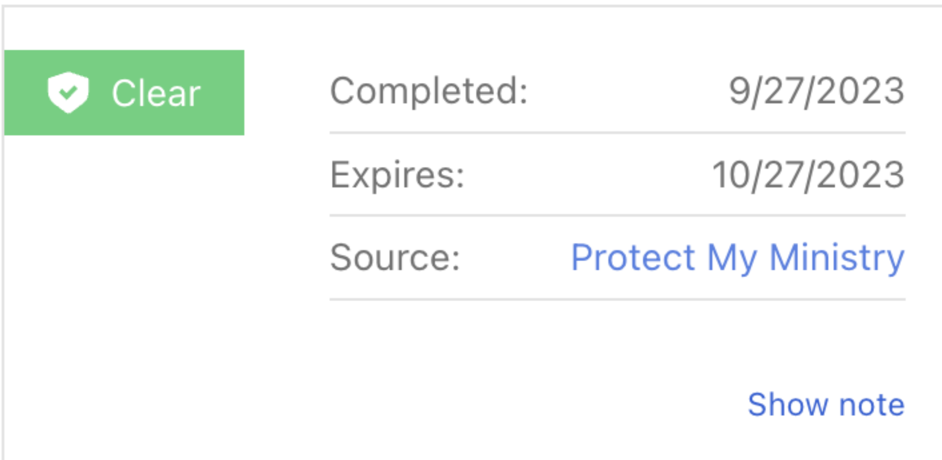
Viewing Background Check Results

- Log in to your Planning Center Account
- If you were notified by email that a background check is complete for an applicant, search for that applicant.
- There are two options for background check results.
    - If you would prefer to have the 'Background Check badge' icon update to green (clear) or red (not clear) and show the date the background check was completed, as well as a link to the report, you will need to send a request to compliance@protectmyministry.com to have risk assessment (adjudication) turned on for your account. If the applicant's results are graded as "Clear" based on No Record criteria, the badge will update as green/clear. If the results return <u>any other value</u>, the badge will update as red/not clear, regardless of whether the applicant meets your criteria for eligibility. You can review the report details by clicking on the link to the report in the details area and in Ministry Mobilizer.

Here is an example of a profile in Planning Center that is green/clear.



You can view the link to the report in “More Details”. Clicking the Protect My Ministry link will open the pdf of the report.

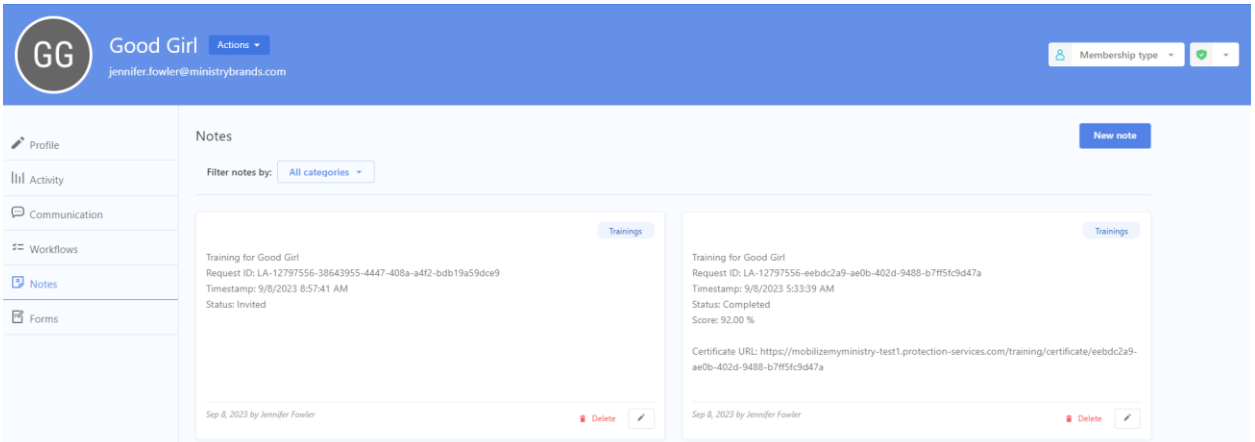


Here is an example of a profile in Planning Center that is red/not clear.

- If you do not want to use our risk assessment option and update the badge in the profile, results will be returned to the Notes field of the profile. Click on “Notes” for that applicant. The status of all orders will be present.

Viewing Child Safety Training Results

- Log in to your Planning Center Account
- If you were notified by email that the training is complete for an applicant, search for that applicant.
- Click on the Notes menu of their profile. All Child Safety Training statuses and results will be present. You can delete any ‘invited’ notes once you receive the completed result.

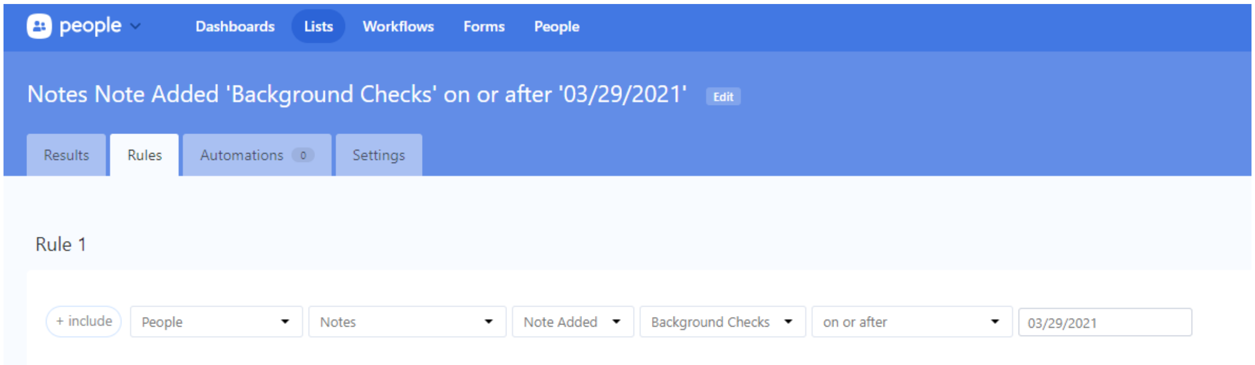


Viewing Completed Background Checks and Training in Planning Center

- 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 PC CSV export or print buttons.
- If you are using the Background Check badge for results, you can click on the Background Checks tab of your People dashboard and view all results and their status there as well.

Creating a List in Planning Center for Completed Background Checks

- Go to "Lists"
- Create a rule 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



- Click Submit to get your list.