

## Getting Started with PushPay (formerly Church Community Builder) & Protect My Ministry for ordering in PushPay/CCB.

### Applicant Links

Our support team will provide instructions on enabling the API. Once you have given Protect My Ministry (PMM) access to the API, PMM will routinely import your active applicants into the PMM database and return a unique link to the applicant profile. This sync process runs continuously but due to the number of active customers and applicants, please allow up to 72 hours for the link to appear in the custom field titled, PMM Report. If you need a link sooner, contact PMM and we can do a manual sync in minutes.

*If you are an admin user in PushPay, you can view/edit the details of the link by clicking "Edit Profile" > Select the 'Admin' tab > Scroll down to the PMM Report Custom Field. It will look like this <a href='https://www.mobilizemyministry.com/ccb/Login?aid=18769851' target='\_blank'>Proceed</a>*

- Note- each unique link will contain a number. This number is the unique applicant ID in the PMM database. It will be associated with your applicant's CCB ID which can be found in the URL when viewing their profile. These two IDs must remain in sync between systems for PMM to update the applicant's custom fields in CCB.
- At any time, you can view the CCB ID associated with the PMM applicant ID for a specific individual. Simply click the report link, log in and go to the Order Background Check option. The CCB ID is located just below "Position." (you do not need to place an order),

### ORDER BACKGROUND CHECK

Position :\*

Standard

CCBID :

26070

### Merging Profiles in CCB

- Warning- merging profiles in CCB without maintaining the proper connection to the PMM ID will break the integration's ability to update data in CCB. For example, If CCB ID = 12 and the MM ID with the consent or background check= 3456, only merge CCB IDs of duplicate profiles INTO CCB ID = 12 (being sure CCB ID 12 is the winner of the merge). If you do not do this, you will lose access in CCB to the PMM information tied to those other profiles. If **NO** PMM activity has occurred on the other CCB IDs, you are fine to proceed with merging. You want to be sure that

the consent form and background check for the PMM ID always stays connected to its linked CCB ID in our database.

- Suggestion- if you need to merge profiles in CCB, do so **BEFORE** using PMM to send out the consent form or order the background check. This will ensure that the data can update correctly on your expected profile- the winner of any merges.
- If you make a mistake, please let us know so we can make updates in our database to get the IDs back in sync again.
- Your applicant information will ALWAYS be safe in PMM should any disconnects occur between profiles.

### Ordering Background Checks

- Start in PushPay. Do not log into Ministry Mobilizer Doing so might risk you placing an order on an applicant who was not first imported from PushPay and therefore has no CCB ID in our database. This will prevent us from updating PushPay with results.
- If you are using the legacy integration that requires you to manually import applicants from PushPay into Ministry Mobilizer, you can continue using that process as it is a different integration but always check to make sure the applicant was imported first before you start the order, or the results will not return to CCB.
- Click the “Proceed” link in the PMM Report Custom Field of the applicant’s profile. You will be asked to enter your PMM credentials.
  - If you have already obtained a consent form and applicant’s PII, click the Order Background Check/CST option.
  - If you would like to collect the applicant’s consent form and PII, choose “Send Link to Applicant.” You will be able to view their completed consent in the “View Documents” option of your menu.
- Follow the prompts to enter any required information (consent option requires first/last name and email address and position if using bundle 4 and background checks will require additional applicant PII such as SSN, DOB, and complete address.
- Next, if ordering the background check, select your package and child safety training (optional for bundles 1 and higher), jurisdiction etc.
- Process Queues are optional- It defaults to No OR you can enter a process queue ID you have already created in PushPay. See <https://support.pushpay.com/s/article/Getting-Started-Process-Queues> for more information. To find the ID to enter for the background check order, select your process queue in PushPay and look for the step ID in your URL at the top of the page. Example [https://multisite.ccbchurch.com/step\\_individuals.php?step\\_id=1965&ax=my](https://multisite.ccbchurch.com/step_individuals.php?step_id=1965&ax=my) (you will only enter the number 1965 and you can enter the name for your process queue as well so the next time you order, it will appear in your drop-down list on our page).
- Review your order, acknowledge the Fair Credit Reporting Act – Client Certification and submit.
- Your applicant link will update to either ‘Awaiting’ (if using the Send Consent option) or Pending if you have submitted the background check.
- Once the report completes, the link will update to Completed. You will then be able to view the completed Report by selecting the Report option after logging in through CCB.

## ACTIONS

ORDER BACKGROUND CHECK/CST

SEND LINK TO APPLICANT

VIEW DOCUMENTS

VIEW REPORT

- If child safety training was ordered, a link will be sent to your applicant using the email provided. Upon completion of the training, a link to the certificate will be updated in PushPay in the applicant's profile using the "CST Certificate" custom field. This field is only created when training is ordered. All training invitations will expire after 14 days if not completed.

*For additional instructions and information that is available in Ministry Mobilizer such as user permissions, invoice history etc. please see our complete user guide.*

For assistance with your account, contact [support@protectmyministry.com](mailto:support@protectmyministry.com)