Protect My Ministry & PushPay (Church Community Builder)

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1. Before You Begin

To complete the PUSHPAY/CCB integration and begin ordering Background Checks through PUSHPAY/CCB, ensure the following:

Requirements

- You must be a **PUSHPAY/CCB Admin**.
- You must have **Protect My Ministry login credentials**.
- You must have the ability to create **Custom Fields** in PUSHPAY/CCB.

Bundle-Based Features

Some features depend on your subscription bundle:

- **Request Authorization** is only available for **Bundles 2 - 4**.
- Request Authorization won't be available if it is not part of your bundle in Protect My Ministry.

What to Expect During Setup

- You will create two required custom fields in PUSHPAY/CCB.
- You will authenticate with PUSHPAY/CCB via Protect My Ministry.

- Once authentication is complete, your member profiles in PUSHPAY/CCB will begin syncing with Protect My Ministry.

- You will receive an email notification once syncing has successfully completed.

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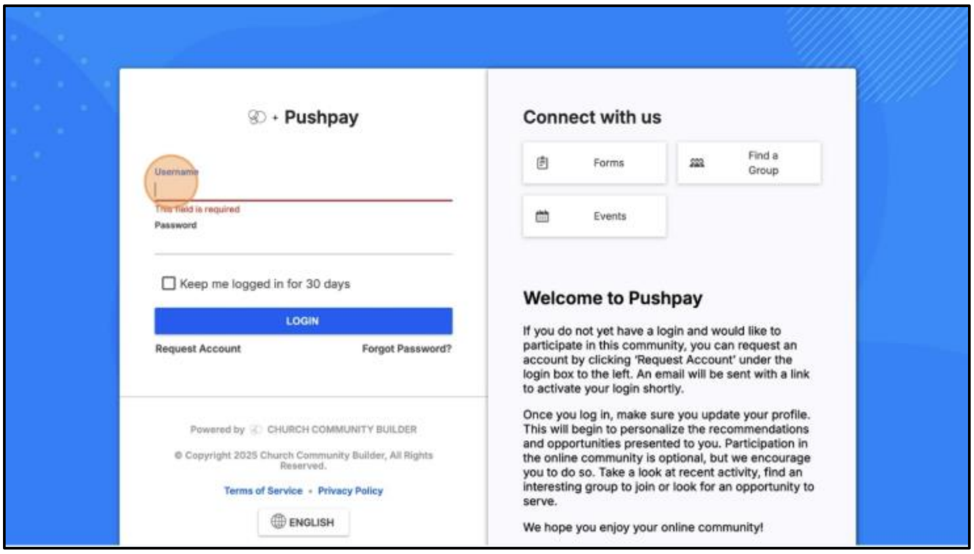
2. PUSHPAY/CCB Setup - Creating Custom Fields

Before connecting your PUSHPAY/CCB account to Protect My Ministry, you must create two custom fields in PUSHPAY/CCB. More detailed information can be found here https://support.pushpay.com/s/article/Getting-Started-Custom-Fields.

2.1 Create Custom Field - PMM Background Check



Steps:

1. Log into your PUSHPAY/CCB account.

2. Navigate to **Settings** > **Custom Fields**.

3. Create a new **required** custom field:

    - **Label:** PMM Background Check
4. Save the field.

2.2 Create Custom Field – PMM Safety Training

Only required if you have CST (Child Safety Training) enabled on your PMM account.

Steps:

1. Create a second **optional** custom field:
    - **Label:** PMM Safety Training"
2. Save the field.

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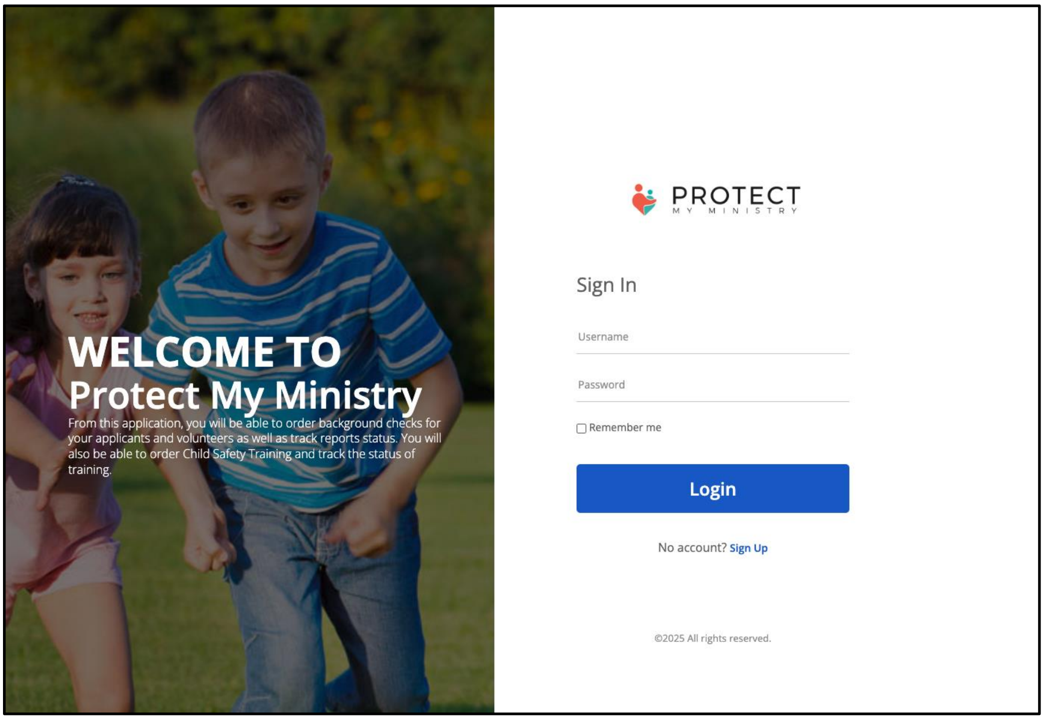
3. Authenticate Your PUSHPAY/CCB Account with Protect My Ministry

3.1 Access the PUSHPAY/CCB Onboarding Link

This link is provided during your onboarding process. It will direct you to the Protect My Ministry login page.



Steps:

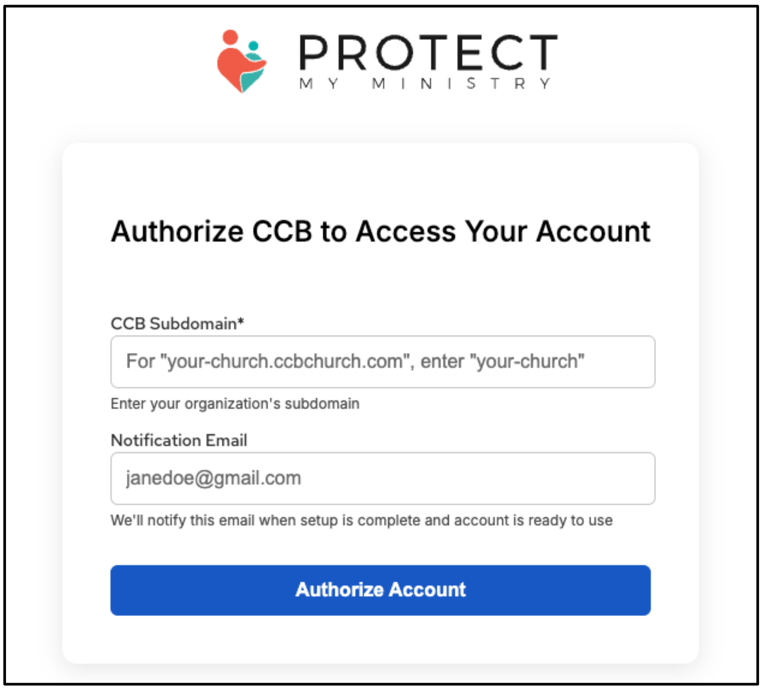
1. Enter your **Protect My Ministry username and password**.
2. Click **Sign In**.

3.2 Complete the PUSHPAY/CCB Authorization Page

After logging in, you will land on the **PUSHPAY/CCB Authorize Page**.

Enter the following:

- **PUSHPAY/CCB Subdomain** (must match your church's URL and do not enter .PushPay/CCBchurch.com)
- **Contact Email** (used for sync notifications)



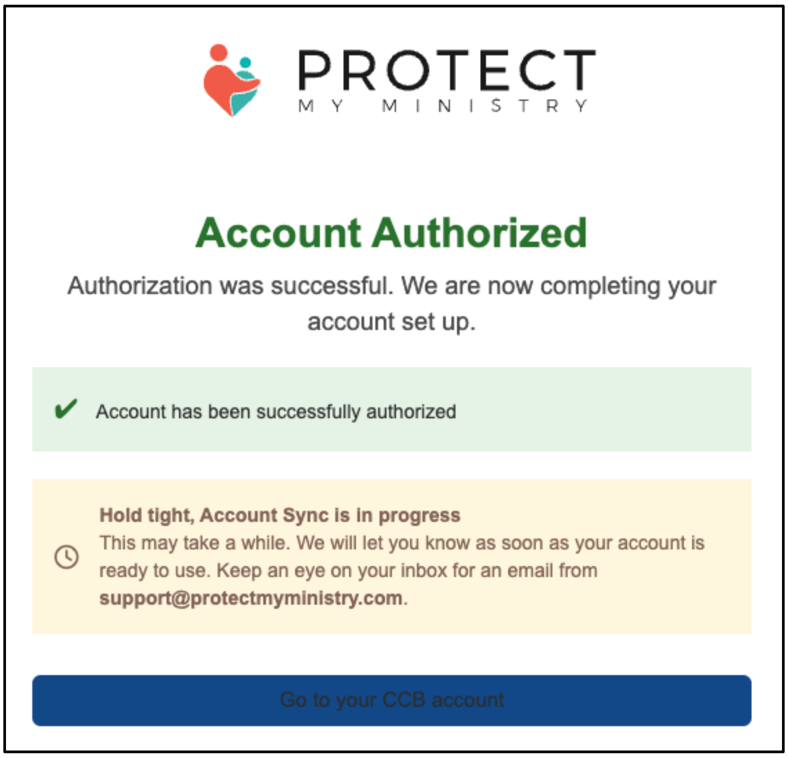
Click **Authorize Account**.

You will be redirected to PUSHPAY/CCB to confirm your login and grant access.

3.3 Successful Authentication

After granting access in PUSHPAY/CCB:

You will return to Protect My Ministry and see a confirmation message that the connection is successful.



3.4 Profile Syncing Begins Automatically

Once authenticated:

- Your PUSHPAY/CCB member profiles will begin syncing into Protect My Ministry.
- You will receive an email once the sync completes.

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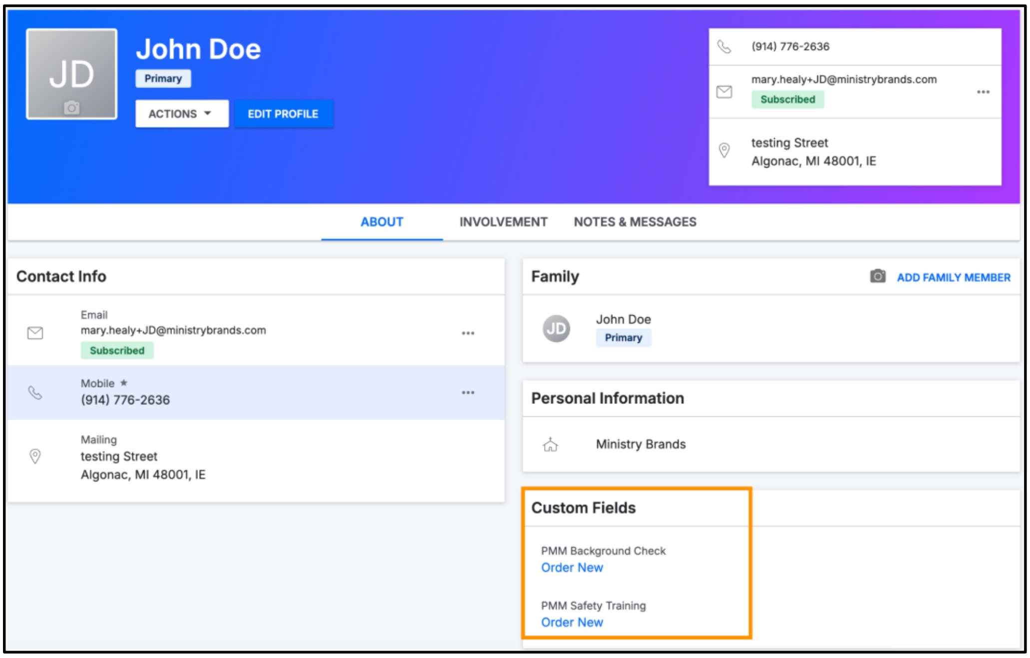
4. Using Protect My Ministry from PUSHPAY/CCB (Client Workflow)

Once fully authenticated and synced, you can begin ordering background checks from within PUSHPAY/CCB.

4.1 Accessing Protect My Ministry from a PUSHPAY/CCB Profile

On a PUSHPAY/CCB member profile, you will see:

- **PMM Background Check** button
- **PMM Safety Training** button (if CST is enabled)



Depending on status, the button will show one of the following:

- **Order New**
- **Awaiting** (Authorization sent)
- **Pending** (Background Check ordered)
- **Order New | View Report** (Completed)

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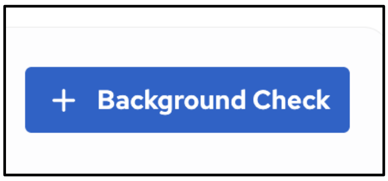
5. Protect My Ministry Profile Overview

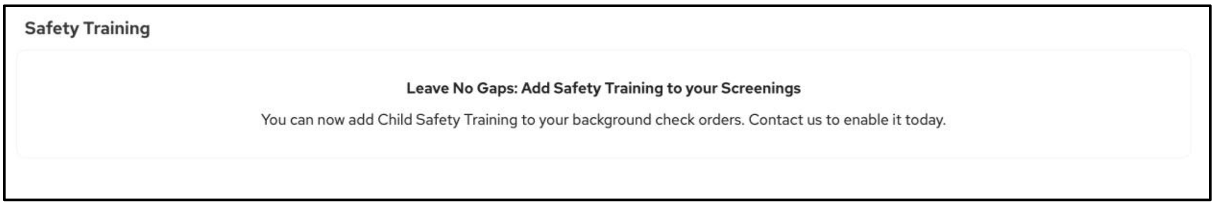
CST Availability Notice

If **Child Safety Training (CST)** is **not enabled** for your organization, the following differences will appear in MM Lite:

- The action button shows **"+ Background Check"** instead of **"+ Background Check & Training"**

- The **Safety Training** section also displays an informational message rather than training options (see screenshots below)





After selecting **Order New** from PUSHPAY/CCB, you will be directed to Protect My Ministry.

5.1 Updated Protect My Ministry UI

You will see:

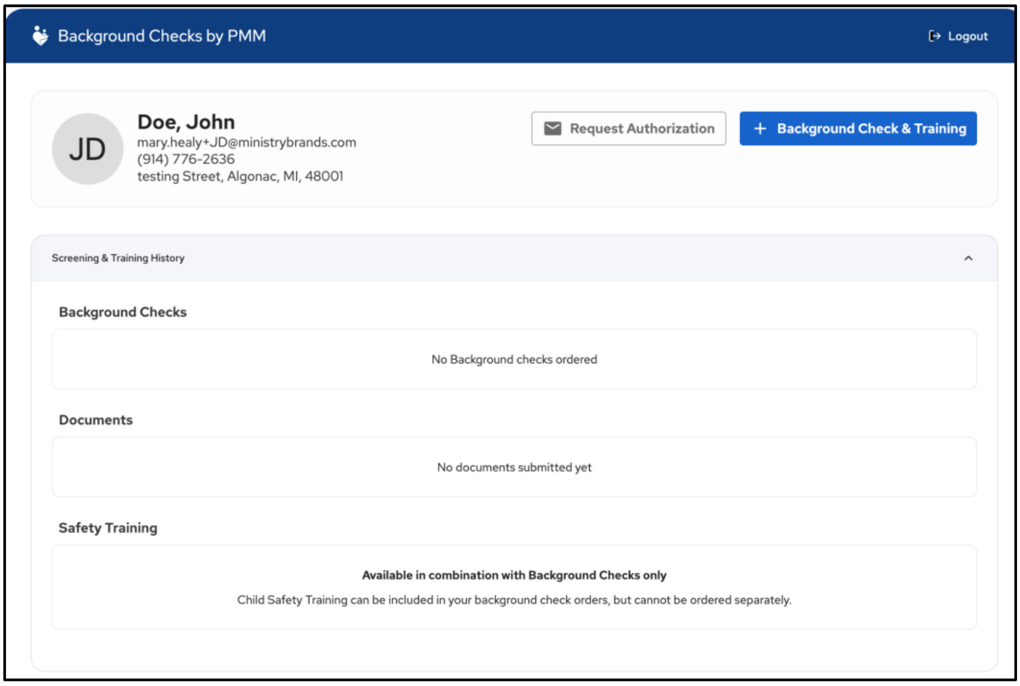
- Applicant Name & Avatar
- Contact Information
- Address
- Buttons:
    - **Request Authorization** (Bundles 2–4 only)
    - **+ Background Check**

5.2 Screening & Training History

This section provides a consolidated view of:

- **Background Checks** (packages, status, completed date, View Report)

- **Documents** (authorization forms)
- **Safety Training** (training type, status, certificates)



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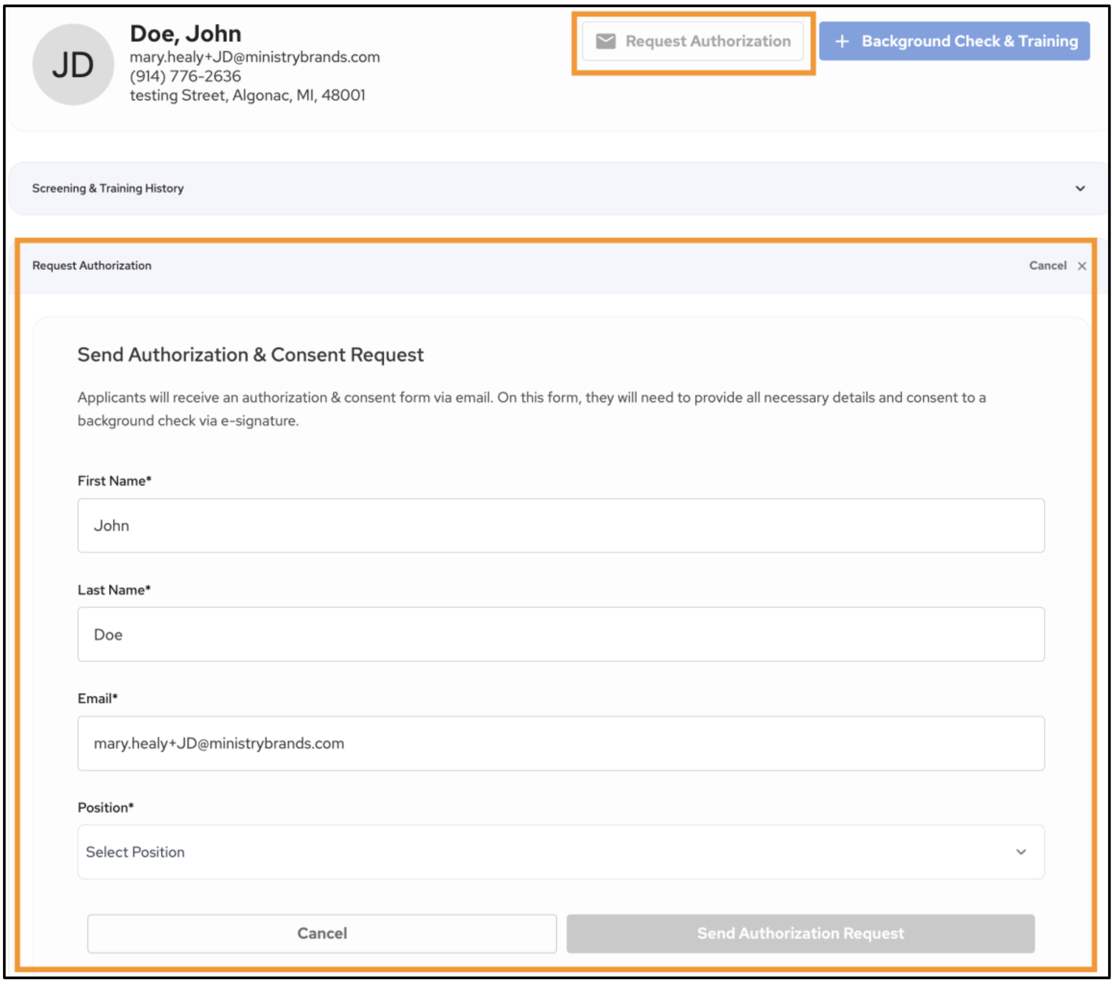
6. Request Authorization (Bundles 2–4 only)

If your bundle supports this feature, the **Request Authorization** button appears at the top of the Protect My Ministry profile.

6.1 Sending an Authorization Request



Steps:

1. Click **Request Authorization**.
2. The Request Authorization Form opens.
3. Mandatory fields:
    - First Name
    - Last Name
    - Email
    - Position
4. Some details will pre-fill based on the PUSHPAY/CCB profile.
5. The **Send Authorization Request** button activates once all required fields are complete.

6.2 Success Confirmation

After sending:

- A success screen appears.
- Click **Done** to return to the Profile page.
- The form appears in the **Documents** section.

Validation messages appear in **red** for clarity.

Position Field Options (Based on Bundle Level)

The **Position** dropdown will show different options depending on your subscription bundle:

- **Bundles 2 - 3:** Only one option appears - **Standard**
- **Bundle 4:** You may see **multiple custom position options**, which are managed within your MM account.

Note: Position is always a required field, regardless of bundle.

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7. Ordering a Background Check

7.1 Starting the Background Check Flow

Click **+ Background Check**.

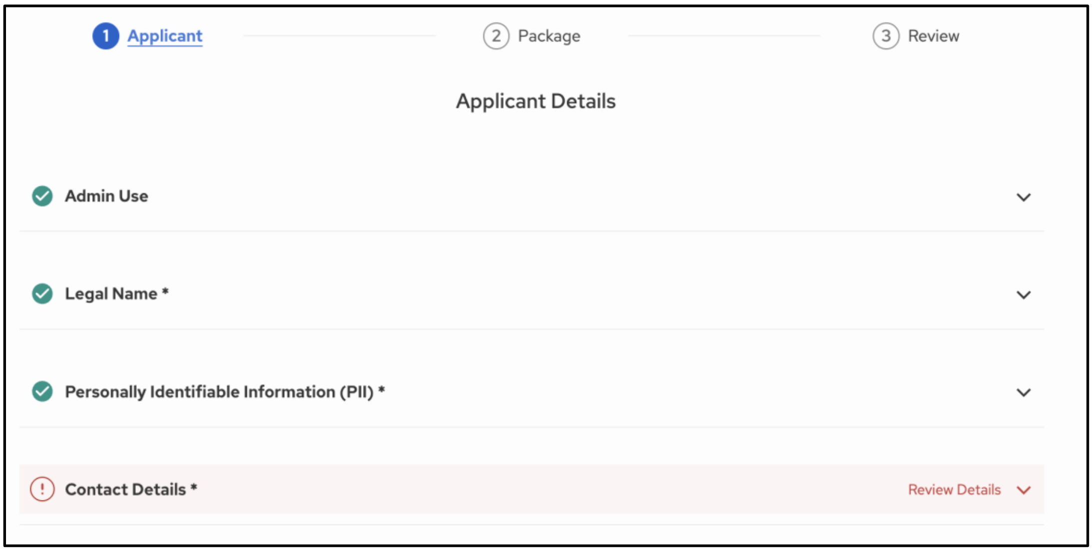
This will:

- Collapse Screening & Training History
- Disable Request Authorization
- Open the Background Check accordion form

7.2 Applicant Details (Accordion Form)

Sections include:

- Legal Name
- PII (Personal Identifiable Information)
- Contact Details
- Address History
- Driver's License
- Admin Use (renamed from "Other")



Missing fields or errors show a **red "Review details"** indicator.

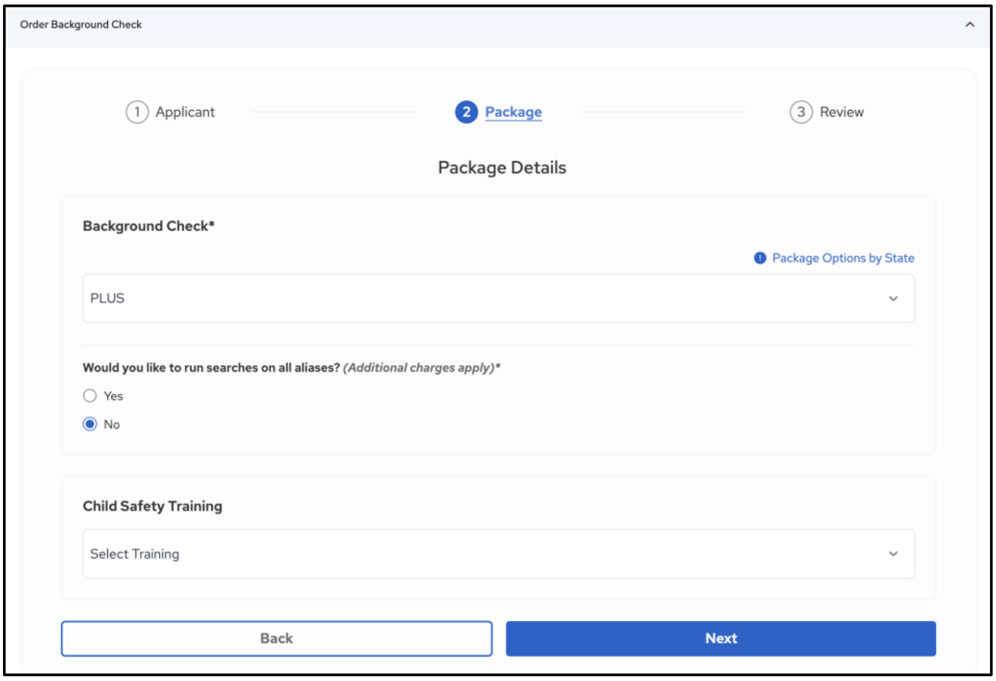
7.3 Adding Aliases

- Click **+ Add Alias** to enter additional names.
- Aliases appear in a table and can be removed.
- More than 5 aliases will make the table scrollable.

7.4 Package Selection

After completing Applicant Details:

- Select a Background Check package
- Optional A La Carte services
- CST (if enabled)

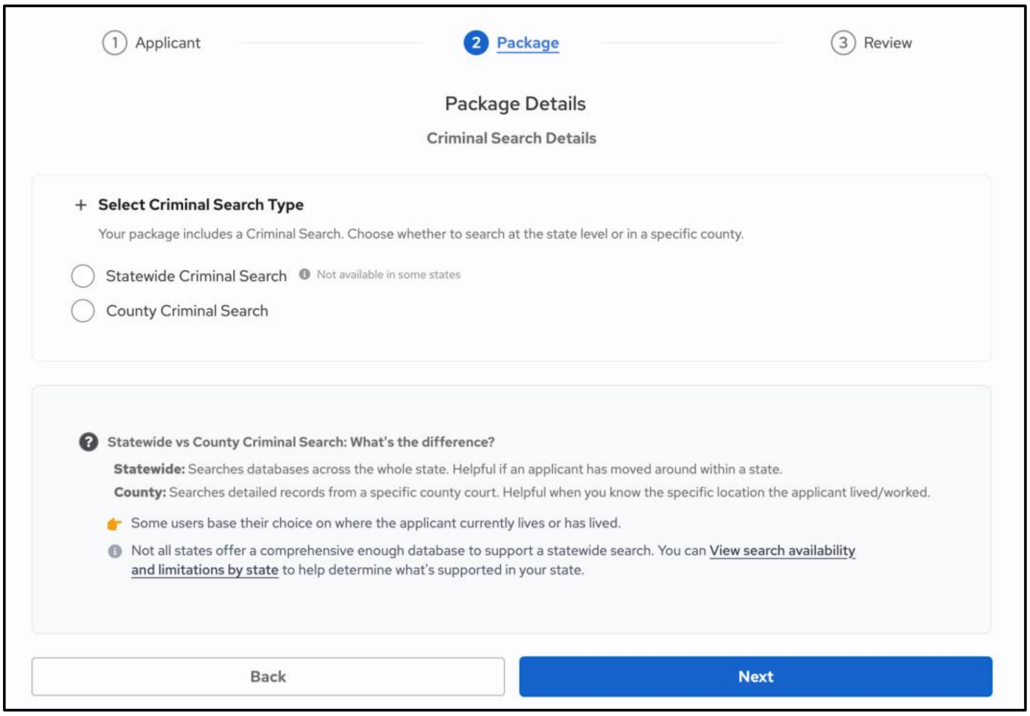


7.5 Criminal Search Options

Users may choose:

- Statewide Criminal Search
- County Criminal Search

Additional search screens will appear depending on selection.



7.6 Review Order

You will be shown:

- Applicant summary
- Package summary
- Certification statement

The **Next** button activates after checking the certification box.

7.7 Success Screen

After ordering:

- You will see an **Order Submitted** screen.
- Click **Done** to return to the Profile page.
- The newly ordered background check appears under **Background Checks**.

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8. Understanding Background Check and Training Statuses

8.1 Background Check Statuses shown in PUSHPAY/CCB

Status	Meaning
Order New	No BGC ordered yet
Pending	BGC ordered and in progress
Order New|View Report	BGC has been ordered and a report is available. Can view or Order new BGC.

8.2 Safety Training Statuses

Status	Meaning
Order New	No CST ordered
Invite Sent	Training email sent
Pending	Training started
Order New|View Certificate	Training Completed, and Cert is available. Can view or Order another training.

End of User Guide for CCB

Supplemental information for CCB users wanting to modify users, email templates, disclosures etc. Through the PMM portal.

User Permissions

*The following Settings will all have to be accessed through Ministry Mobilizer https://www.mobilizemyministry.com/login/Account/Login.

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.
***Remember you are only accessing Ministry Mobilizer to adjust settings, create users, view invoices etc- not to place background checks. If you need to order background checks or training, only do so if the applicant was synced from CCB and not added as a new applicant, or their results will not return to CCB.**

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.

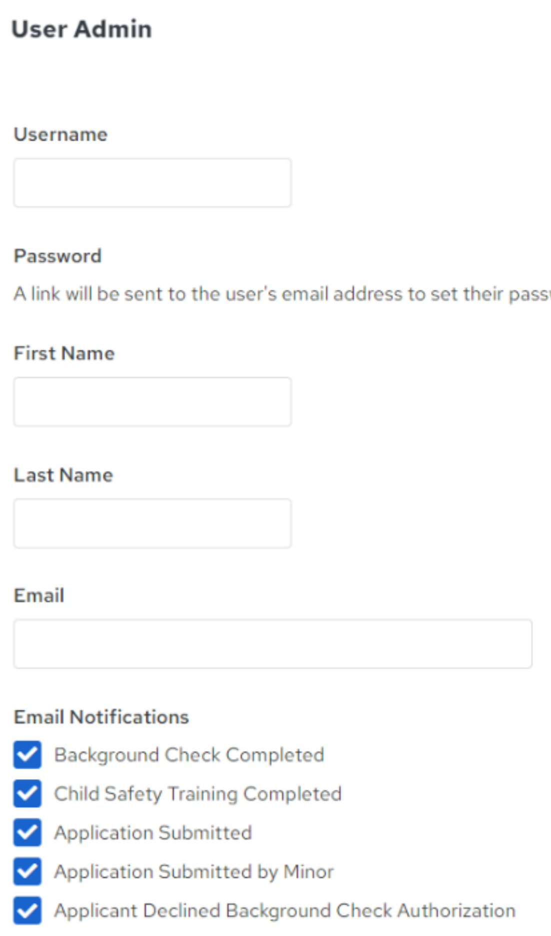
Notification emails come from message@mobilizemyministry.com, please whitelist this email address with your email provider. This will keep your notifications from ending up in your junk or spam email folders.

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 **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.

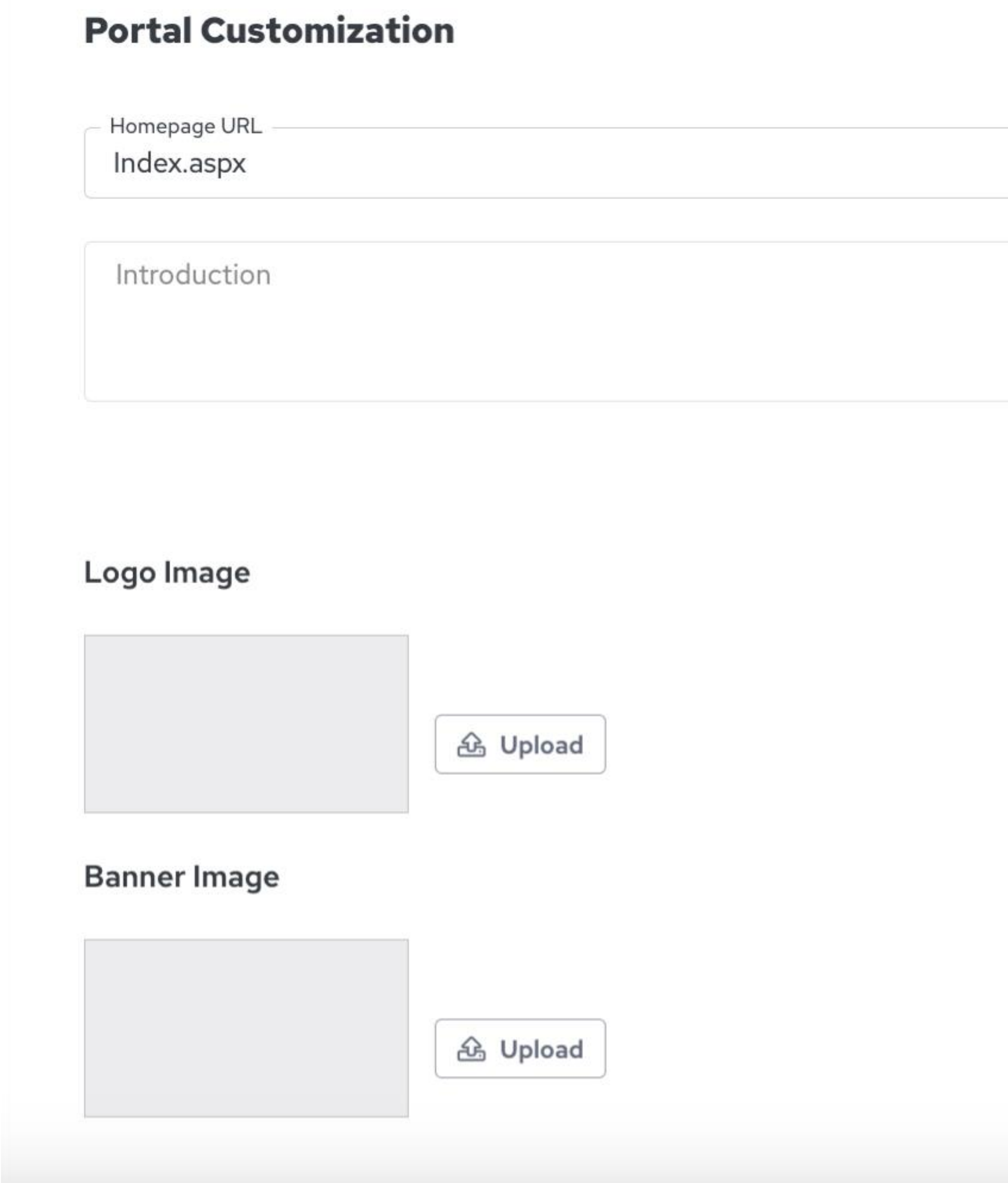


View Invoices

To view invoices, click your initials in the top right and select ‘My Org’ from the drop down. Next, select Invoice History and use the filters to search.

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.

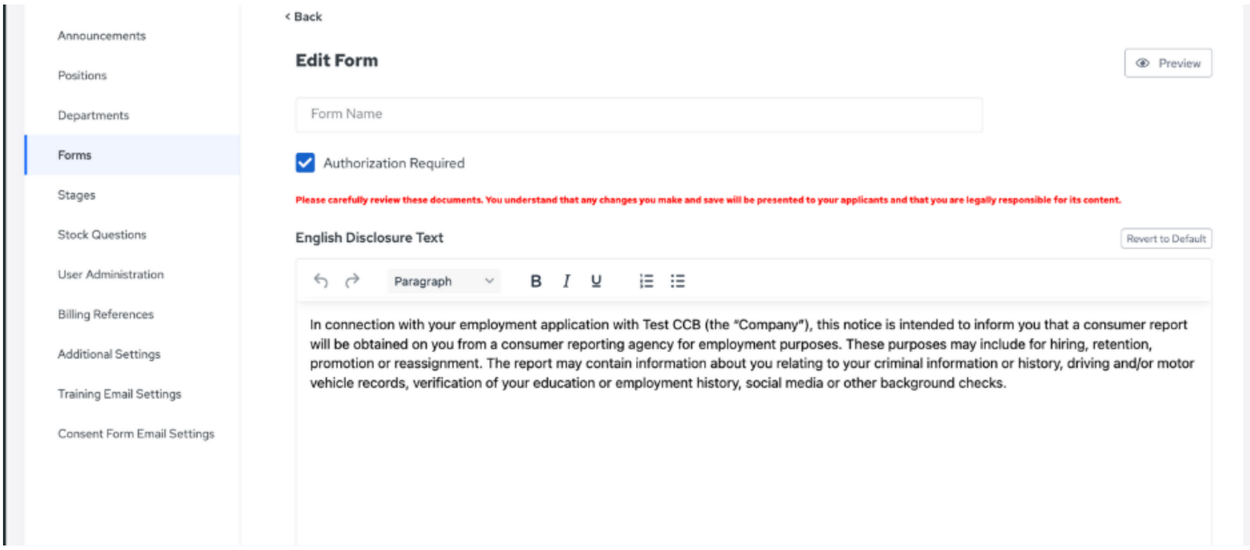
Banner Image: 2 3 4

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 with 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. 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 to. 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. PMM does not support DMARC and changing the 'from' email could result in a higher bounce rate.

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.