

Rock V3

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Ordering a Background Check

- Through Candidate Profile
 - Submit with Approval
 - Order Training through Actions
- Through Plugin
 - Child Safety Training
 - Manual Order
 - Start Invite

View Results

- Through Plugin
- Through Candidate Profile

Screening Flows

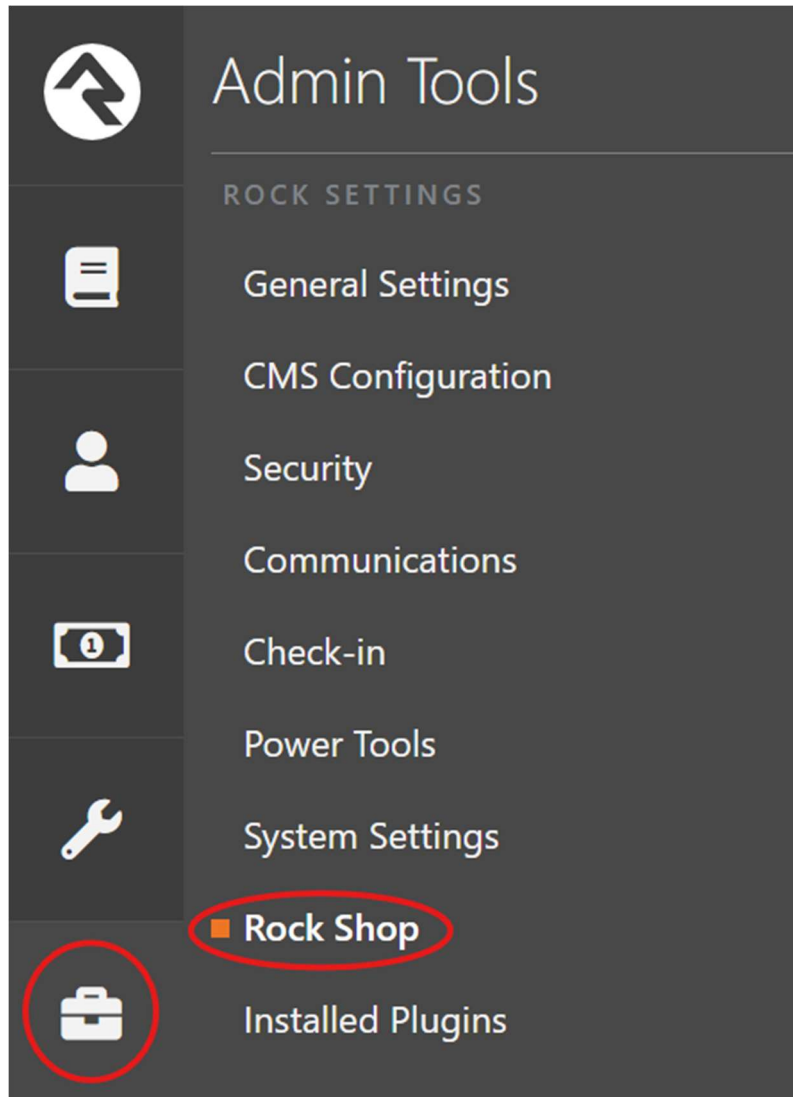
PMM Portal Settings

- Create Background Check Packages
- Create Billing References
- Edit Email Templates
- Add New Users
- Edit Rescreen Interval
- Edit Invitation Expiration

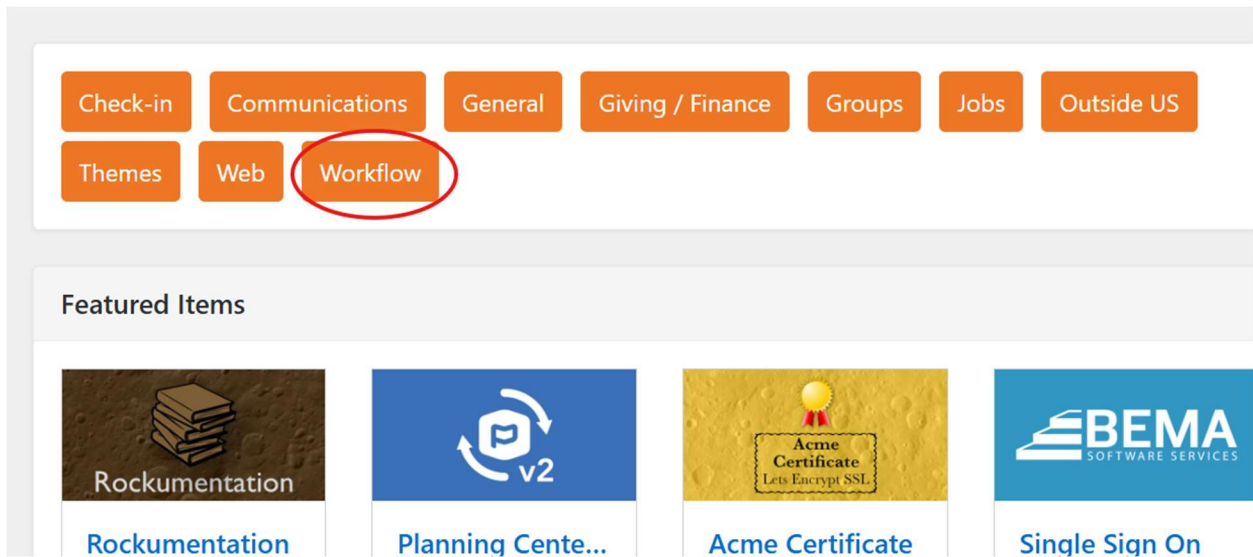
Installing Plugin

The plugin for Protect My Ministry v3 Integration is available to install through the Rock Shop

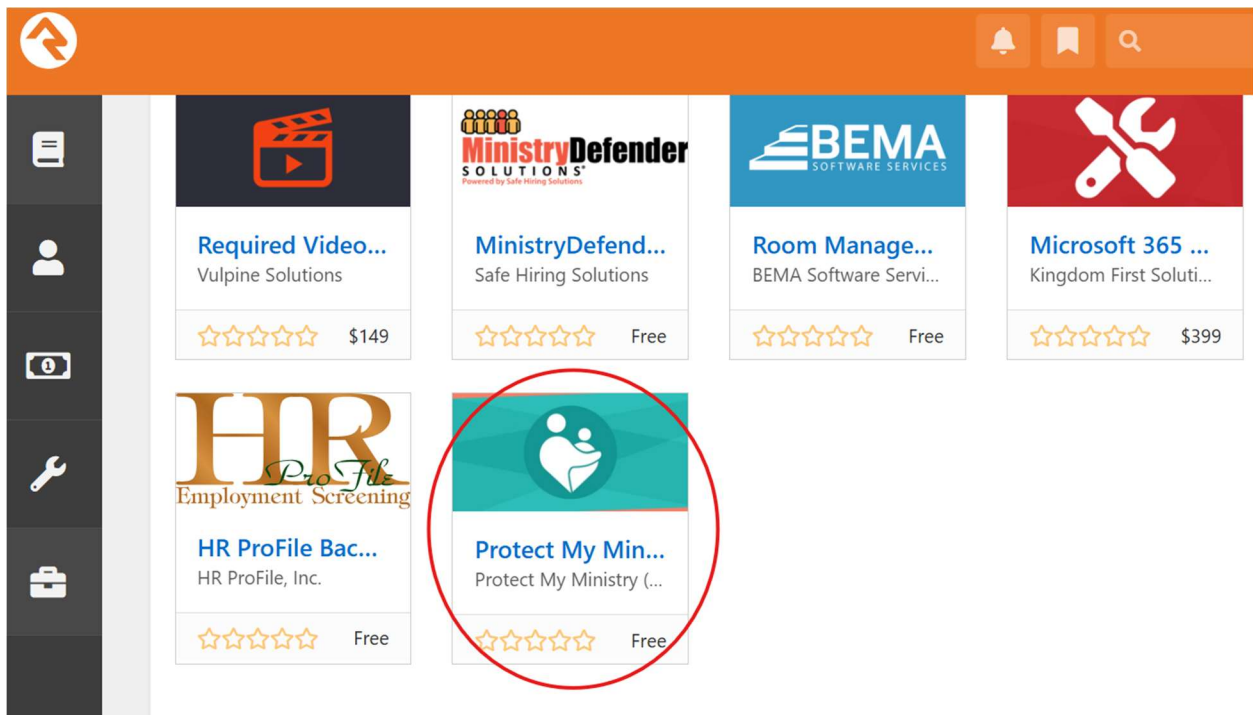
- In Admin Tools, select Rock Shop



- On the top of Rock Shop will be orange tabs. Click on "Workflow"



- Scroll through all available Plug-Ins until you see Protect My Ministry
 - ***Note*** - Protect My Ministry 2.0 is still in the Rock Shop. Make sure you are downloading Protect My Ministry 3.0



- If you have not yet gone through the sign up process to get the new integration, there will be a link to sign up with Protect My Ministry on the plugin page. Or you can call 800-319-5581 to talk to a sales associate to sign up.

- You **MUST** sign up, even if you are an existing account so PMM can properly integrate and update the account

Free

Install

☆☆☆☆☆

Last Updated
2/25/2025

Required Rock Version
v16.4

Author
[Protect My Ministry \(Ministry Brands\)](#)

[Package Website](#)

Package Description


Experience the next level of convenience and efficiency with [Protect My Ministry's](#) 3.0 integration, now packed with more features to enhance your workflow and simplify the background check and training process. Seamlessly manage every step of your background screening directly from your Rock instance, with improvements designed to save you time and effort.

Key upgrades include real-time tracking of Child Safety Training orders, rescreen tracking, billing references on both invite and manual orders, and the ability to create unlimited custom email templates. Plus, automated workflows ensure this critical part of your security protocols runs smoothly and consistently.

With nearly a decade of partnership with Rock and trusted by churches like Christ Church of the Valley and Willow Creek, Protect My Ministry is your expert resource for building a top-tier risk mitigation program tailored to your needs. Let us help you safeguard your organization with confidence [Sign up HERE today!](#)

- Install the Protect My Ministry 3.0 Plug-In

Peace of mind through common sense security.



Protect My Ministry 3.0

by Protect My Ministry (Ministry Brands)

Free

Install

☆☆☆☆☆

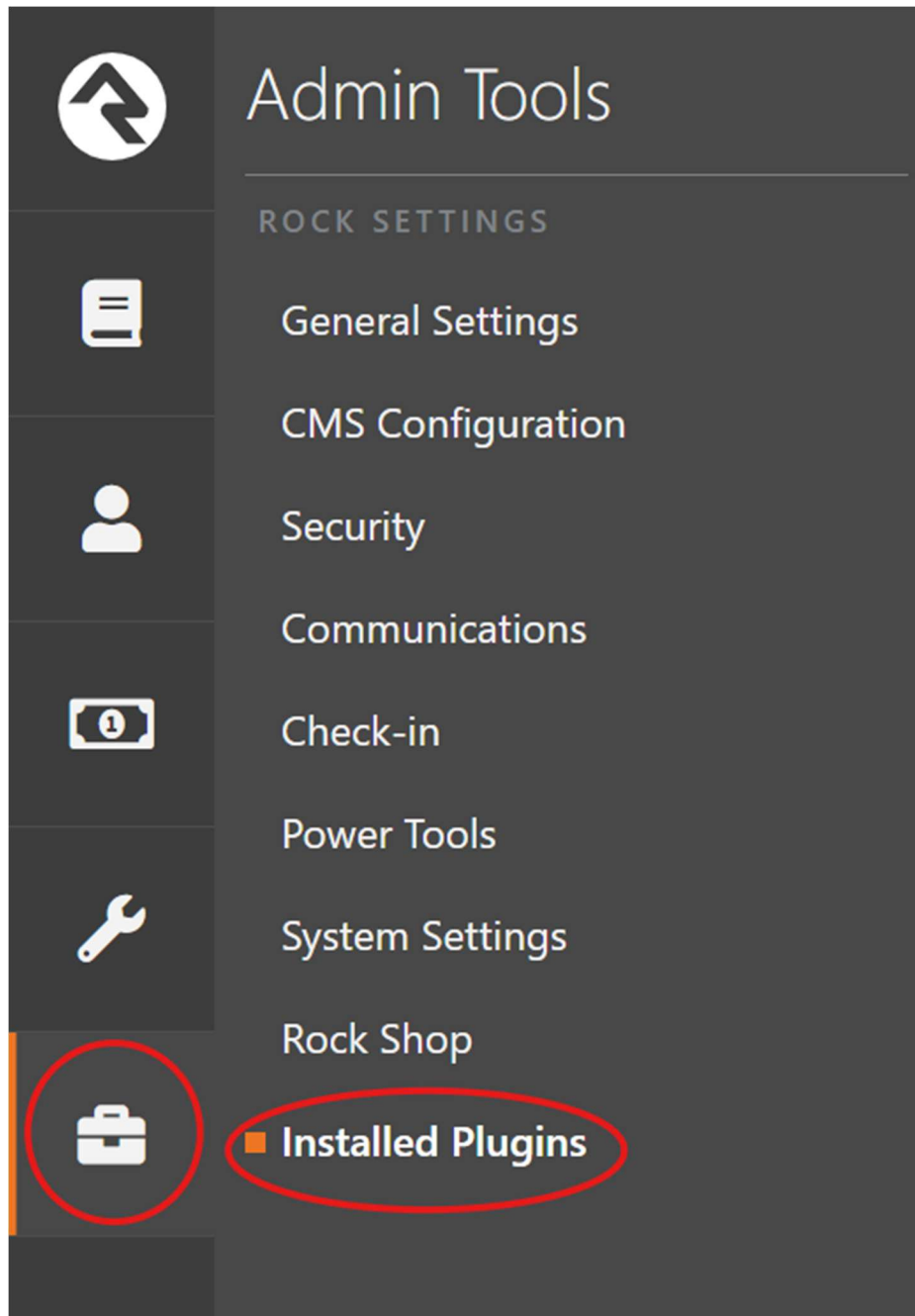
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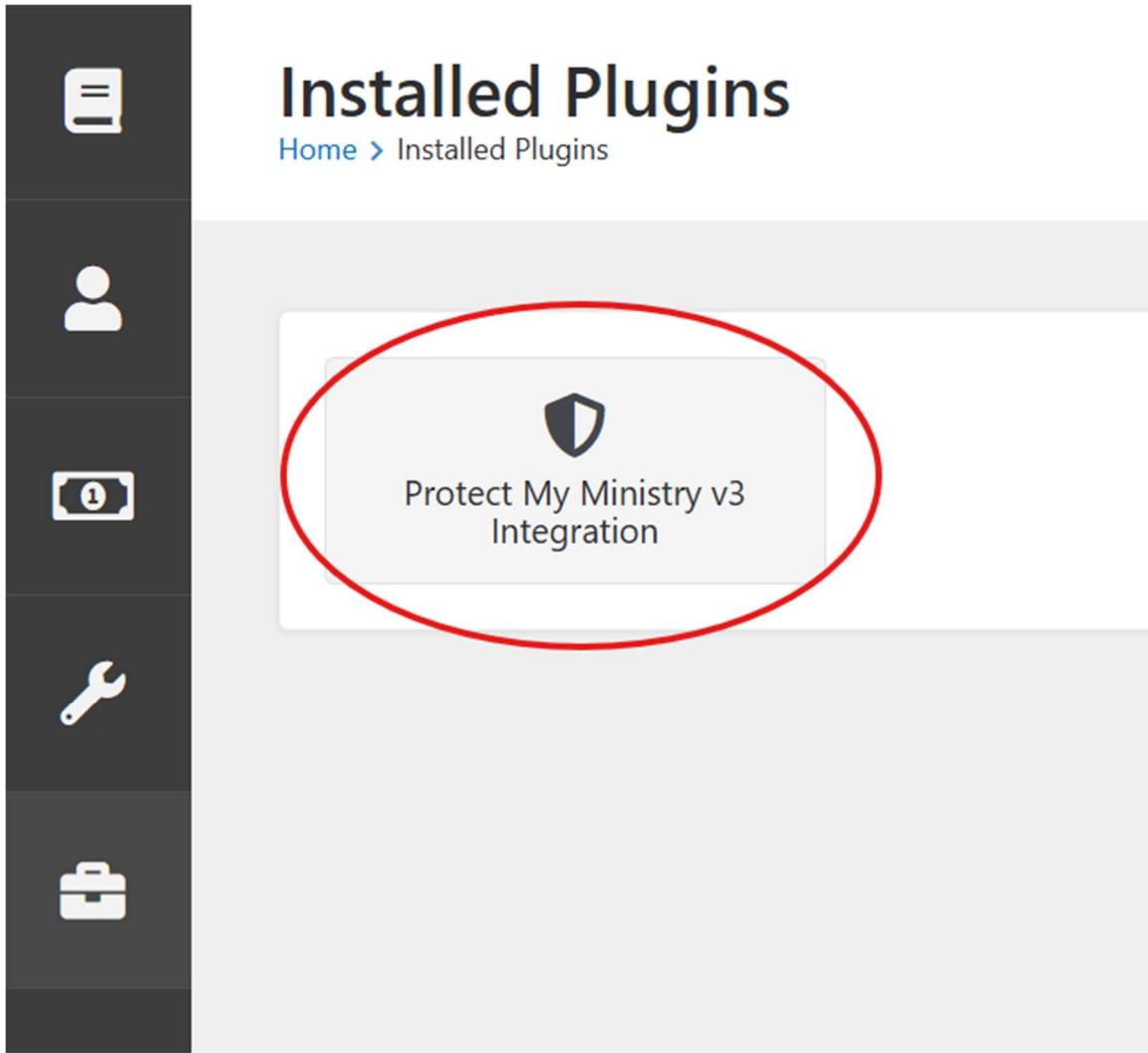
Setting up API Key

Once the account has been signed up by Protect My Ministry, you will receive an email confirmation that the account is ready along with an API Key to plug into Rock.

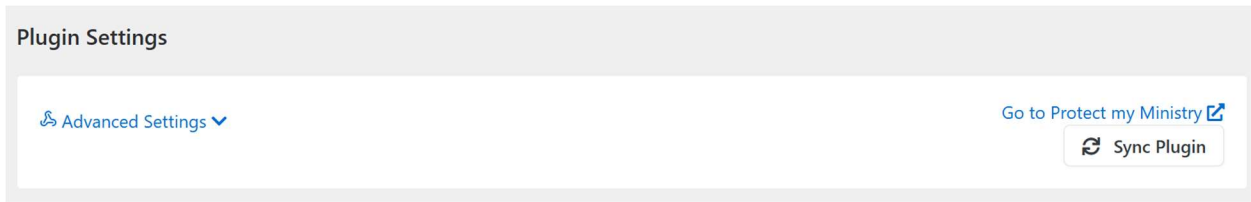
- When you get the API Key from Protect My Ministry, go into the Admin Tools in Rock and select Installed Plug-Ins



- Click on the Protect My Ministry v3 Integration option
 - ***Note*** If you do not see PMM v3 Integration as an option under Installed Plugins, you may need to double check that you have successfully installed this plugin



- Enter the API Key under Plugin Settings > Advance Settings by clicking on the Edit button



API Secret

Edit

Configured

Update Group

Completed Background Checks Notified Group

- Updates Notification Group - This is to choose who will receive notifications from Protect My Ministry when a new background check package or billing reference is added in the PMM Portal.

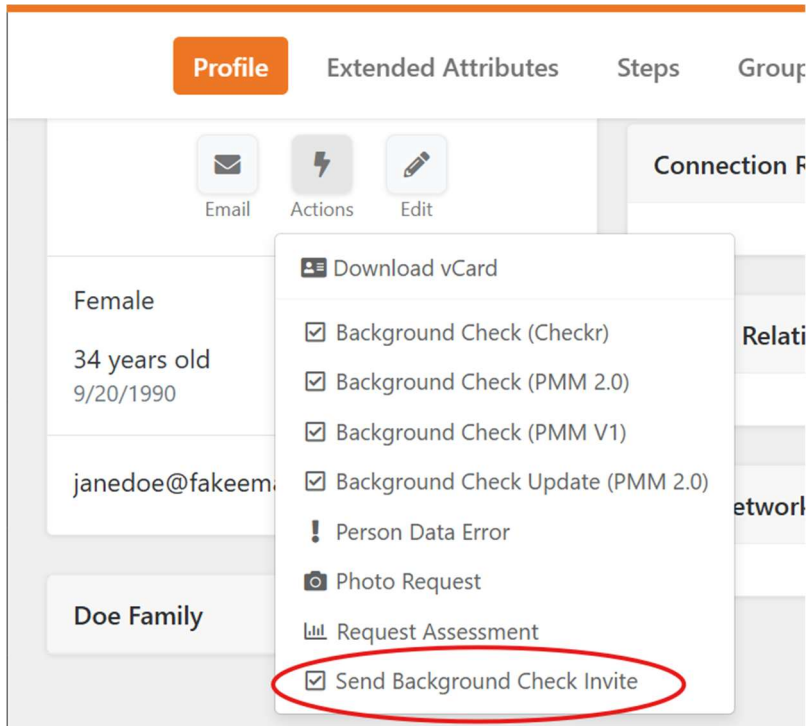
Ordering a Background Check

After installing the PMM 3.0 plugin and entering in the API Key, you will now have the ability to order the background checks inside of Rock

There are two ways to order a background check, through the candidate's Rock profile or through the PMM 3.0 plugin

Through Candidate Profile

- Inside of Rock, pull up the candidate's profile
- Under the Actions option, under the candidate's profile picture, click on "Send Background Check Invite"
 - ***Note*** If you have other PMM plugins, you will still see them as an option here. For the new integration, the option is only "Send Background Check Invite"



- You will be able to choose the type of background check to order and send out an online consent form link to the candidate to give consent and other required information needed.

Email ⓘ

✉ jessie.willis@ministrybrands.com

Package ⓘ

Billing Reference ⓘ

Training Type ⓘ

Background Check Email Template

Safety Training Email Template

- **Email** - The email address will automatically populate with the candidate's email address from their Rock profile. You are able to change the email address if needed
- **Package** - The different background check packages that can be ordered from your account

- **Billing Reference** - Optional. These will only show up on your invoice to group together applicants that you've ordered background checks on. These will not affect the background check
 - **Training Type** - If you would like this applicant to go through The Child Safety Training. The Child Safety Training is a series of videos with a test at the end about child abuse awareness. This feature is a yearly cost. If you have not signed up with this feature, please contact our Support team at support@protectmyministry.com or call 800-319-5581
 - **Background Check Email Template** – Select the email template to send to the applicant with the online consent form link. Created and edited from the PMM portal
 - **Safety Training Email Template** – Select the email template to send to the applicant with the Child Safety Training link. Created and edited from the PMM portal
- The last step is to look over the FCRA Certification and Submit the order request to send the applicant the Online Consent Form
 - ***Note*** Even though this says Fair Credit Report Act, this does not mean a credit report is ordered on your applicant.

FCRA Certification

By submitting this workflow action, I hereby request that a link to a consumer report ordering system be sent to the consumer. This consumer report ordering system shall provide a clear and conspicuous disclosure in writing to the consumer that a consumer report may be obtained for employment or volunteering purposes and, further, it should obtain the consumer's authorization in writing for the procurement of a consumer report.

I am certifying:

- That a clear and conspicuous disclosure has been made in writing to the consumer, in a document that consists solely of the disclosure, that a consumer report may be obtained for employment purposes;
- That the consumer has authorized in writing the procurement of a consumer report;
- That before taking any adverse action based in whole or in part on the consumer report, my Company will provide to the consumer a copy of the report and a description in writing of the rights of a consumer under the Fair Credit Reporting Act as prescribed by the Federal Trade Commission;
- That this consumer report is being obtained for employment or volunteering purposes;
- That the information from the consumer report will not be used in violation of any applicable Federal or State equal employment opportunity laws or regulations;

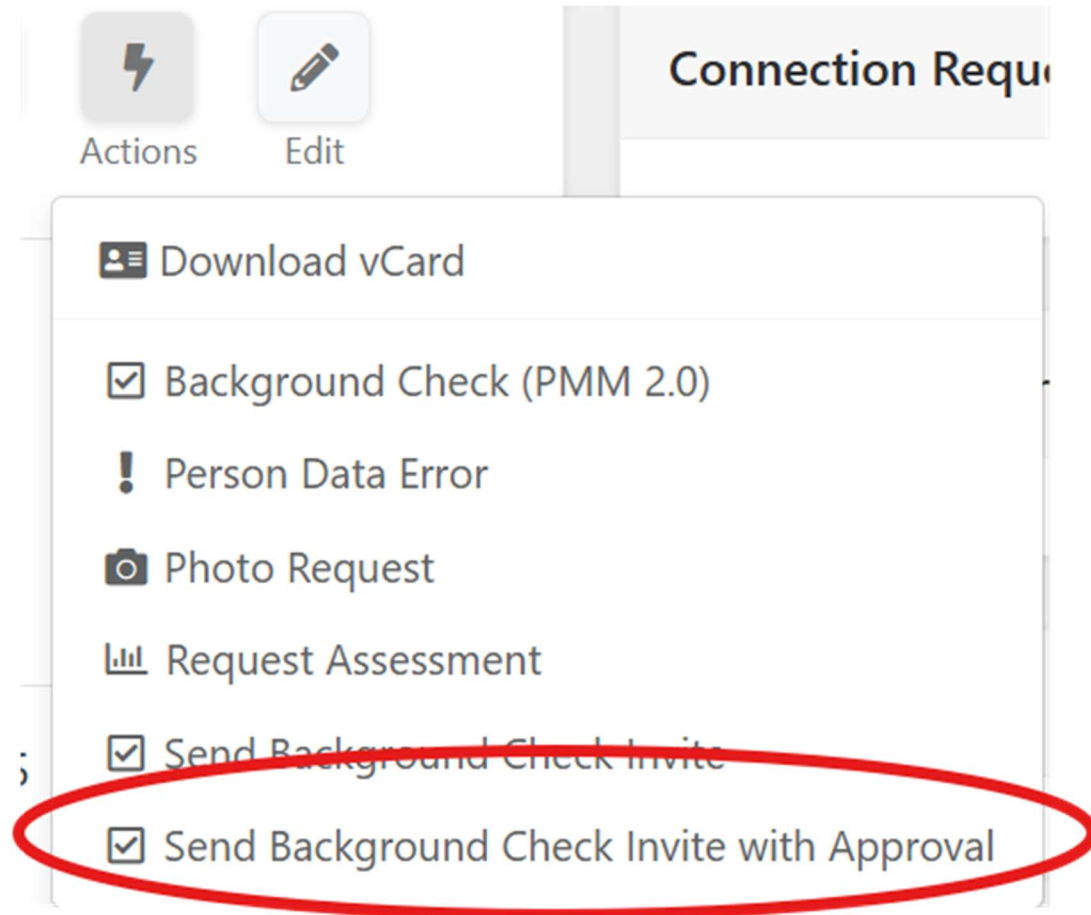
Submit

- The candidate will receive an email with a link to fill out the online consent form and to enter in the required information needed to run the background check and to give consent.

Submit With Approval

Submit with Approval allows an approver in Rock to approve the invitation of the background check.

Note: This feature will only be available with Rock version 16.7 or higher.



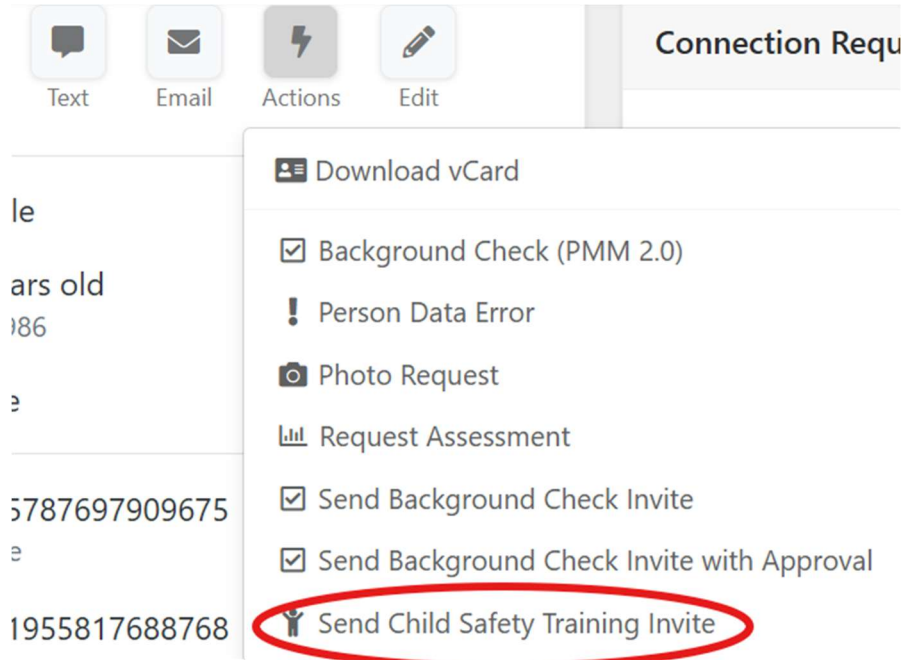
- The approver will get the request under My Tasks and approve the background check to continue
 - The approver will be able to adjust the background check, billing reference, and training type before approving

- When approved, the submission will go through and the email to the online form will be sent to the applicant
- If denied, the submission will go back to the requester with notes from the approver

Order Training through Actions

In addition to order the Child Safety Training with the background check, you can send out the Training by itself

- Under the Actions menu, there will be a separate Send Child Safety Training Invite option



- Choose the type of Training to send out: Volunteer, Employee, or Spanish

Child Safety Training Invitation Details

Jessie, please complete the form below to start the safety training invitation process.

Applicant

Jessie Willis

Email ⓘ

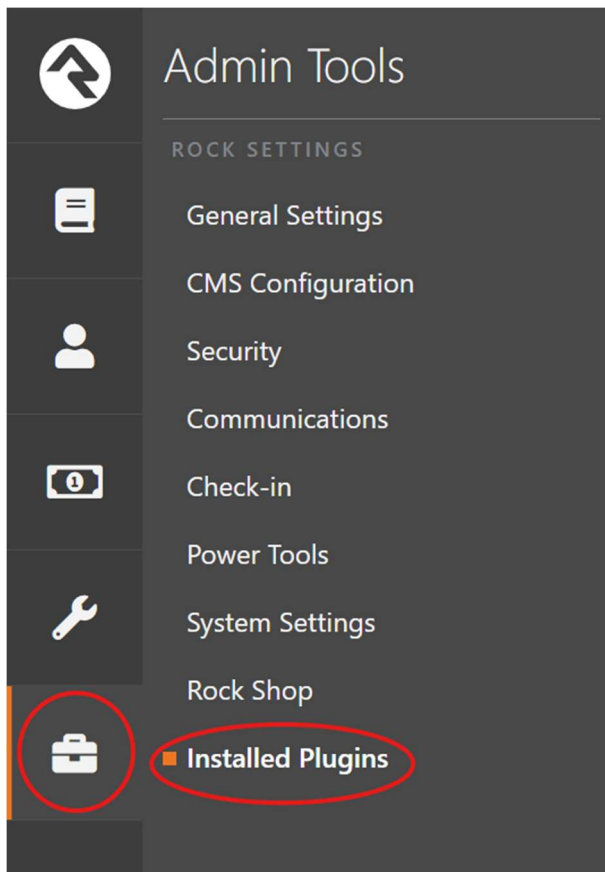
✉ jessie.willis@ministrybrands.com

Training Type ⓘ

Safety Training Email Template

Through Plugin

- Go into Admin Tools > Installed Plugins and select Protect My Ministry v3 Integration



- There will be three options, Child Safety Training, Manual Order, and Start Invite Order

Protect My Ministry v3 Integration

Order Background Checks and Safety Training, and manage your PMM Plugin.

What would you like to order?



Child Safety Training

Order Child Safety Training for groups or individuals

[Start Order →](#)



Background Check

Order Background checks via candidate invite or start a manual order. You can add safety training invite to background check orders too.

[Manual Order](#)

[Start Invite Order →](#)

Child Safety Training – Order the Child Safety Training by itself without a background check

Manual Order – Enter in the applicant’s information yourself if you have the applicant’s authorization form

Start Invite Order – Send a consent form link to the applicant to have them enter in their own information online

Child Safety Training

Send the Child Safety Training link to a single applicant (Single Candidate) or to a Data View in Rock (Bulk Invite)

Safety Training Request

Single Candidate

Bulk Invite

Person •

Initiate Order



Manual Order

Order the background check and input the data manually for a single applicant (Single Candidate) or to a Data View in Rock (Bulk Invite)

Background Check Request

Single Candidate **Bulk Invite**

Person •

Initiate Order

Background Check Request

Manual Order

1 Searches → **2** Information → **3** Billing & Email → **4** Review Order

Searches – Choose the type of background check and the version of the Child Safety Training to order on the applicant

Information – Enter all of the required information needed to run a background check

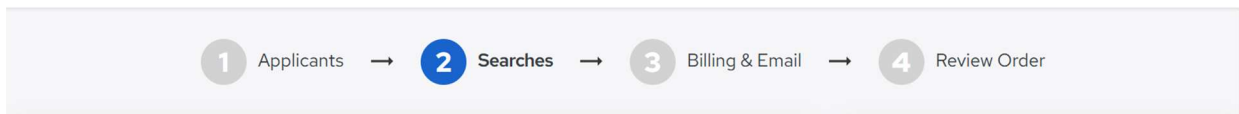
Billing & Email – Choose a Billing Reference and the Child Safety Training Email Template, if Child Safety Training was chosen

Review Order – Review and Submit the order

Start Invite Order

Send the online consent form link for a single applicant (Single Candidate) or to a Data View in Rock (Bulk Invite)

Invite Order



Applicants – Add, Edit, or Delete an applicant from receiving the invitation

Searches – Choose the type of background check to order after the applicant completes the online form

Billing & Email – Choose a Billing Reference and select the email templates for the background check and Child Safety Training, if Training was selected

Review Order – Review and submit the order

View Results

Once the background check is completed through Protect My Ministry, you will receive an email notification and you will be able to view it back in your Rock account in two ways, through the candidate's profile or through the plugin.

- ***Note*** - Both ways will send you to the PMM portal to view the PDF file of the results


Through Plugin

- Go back to Admin Tools > Installed Plugins > Protect My Ministry v3 Integration




Protect My Ministry v3 Integration

[Home](#) > [Installed Plugins](#) > [Protect My Ministry v3 Integration](#)


Protect My Ministry v3 Integration

 **PROTECT**
M Y M I N I S T R Y

Welcome to the Protect My Ministry Integration Administration Block. This tool allows you to manage and customize the integration of Protect My Ministry with your Rock RMS system. Use this block to seamlessly administer background checks, ensuring the safety and security of your community.

- Under the Protect My Ministry v3 Integration table will be a Requests table where all candidates with a background check request will be listed

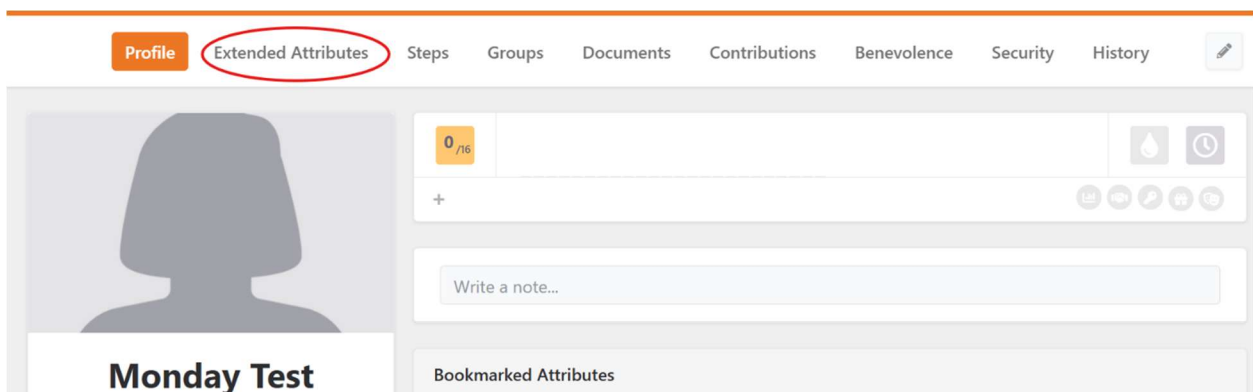
Requests						
Name	Requested	Completed	Package	Status	Training Status	Report
Bhaskaran, Radha	3/13/2025	3/13/2025	Testing for DD (State Michigan)	Invited	Pending	
Bhaskaran, Karthik	3/13/2025	3/13/2025	Testing for DD (State Michigan)	Invited	Pending	
Fowler, Jennifer	3/13/2025	3/13/2025	Sex Offender Search	Invited	N/A	
Test, Monday	3/13/2025	3/13/2025	MVR	Pending	N/A	
Test, Monday	3/13/2025	3/13/2025	Testing for DD (State Michigan)	Completed	InProgress	

- When the report is completed, there will be a PDF file under the Report column to the right side of the table. This will take you to the PMM portal to view the completed report
- In the PMM portal, you will click on the "View" hyperlink under the Report column. This will bring up the PDF file of the results of the background check

Name	Email	Authorization	Date Requested	Status	Report	Assessment
			3/13/2025	✓ Completed	View	

Through Candidate Profile

- Search for the candidate's profile inside of Rock and click on Extended Attributes on the top of the profile



- There will be a Safety & Security section and a PMM Background Check History section

- The Safety & Security section will display information from the most recent background check ran on the candidate

Safety & Security

Background Checked

Yes

Background Check Date

3/13/2025

Background Check Result

Pass

PMM Applicant Id

ec0c9fe2-25b4-4298-aa3a-cec705f4b1e1

- The PMM Background Check History section will show all of the background check requests ran on this candidate

PMM Background Check History

3/13/2025

Pending

MVR

[View In Portal](#)

3/13/2025 - 3/13/2025

Completed

Testing for DD (State Michigan)

Training: Employee (InProgress 3/13/2025)

[View In Portal](#)

3/10/2025

Invited

Testing for DD (State Michigan)

Training: Employee (Pending 3/10/2025)

[View In Portal](#)

3/10/2025 - 3/12/2025

Expired

Testing for DD (State Michigan)

[Send New Request](#)

Training: Employee (Pending 3/10/2025)

[View In Portal](#)

3/10/2025 - 3/10/2025

Completed

Testing for DD (State Michigan)

Training: Employee (InProgress 3/10/2025)

[View In Portal](#)

- To view the results on any of the background checks, you must click on the View in Portal hyperlink, which will transport you into the PMM portal.

- In the PMM portal, you will click on the "View" hyperlink under the Report column. This will bring up the PDF file of the results of the background check

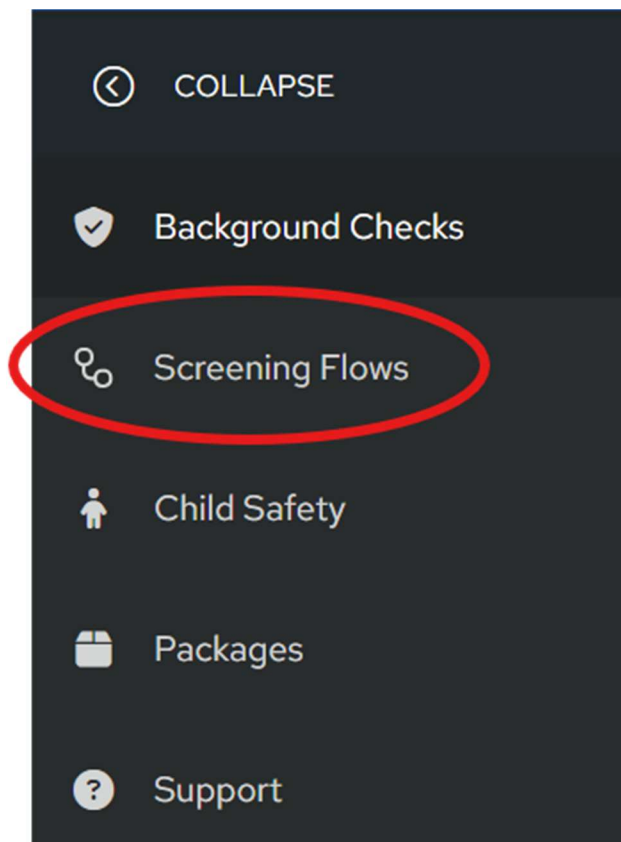
Name	Email	Authorization	Date Requested	Status	Report	Assessment
			3/13/2025	Completed	View	

Screening Flows

Screening Flows offers a way to have the background check to be placed in the middle of an existing workflow. The Screening Flow will need to be created through the PMM Portal, then made within Rock's workflows.

Note: This feature will only be available with Rock version 16.7 or higher.

- Go into the PMM portal
- Click on Screening Flows in the left hand menu



- Click on Create New Flow to create a new Screening Flow, or click on the pencil icon next to an existing Screening Flow to edit it

Screening Flows

Manage your automated screening workflows and create new ones.

[+ Create New Flow](#)

🔗 Flow Configuration

Flow Name*

0/100

e.g., Children's Ministry Volunteers

Give this invite a clear, role-based name so it's easy to reuse.

Flow Description*

0/300

e.g., Standard screening for low risk volunteering roles

Describe what this flow is for.

Background Check Package*

Select Background Check Package

Flow Name - Name of the Screening Flow

Flow Description - Description of the Screening Flow

Background Check Package - The background check package that will be ordered

⚙️ Flow Settings

🚫 Include Child Safety Training



Volunteer, Spanish



📄 Include Billing Reference



Flow Preview

1 Applicant Submits Consent Form



2 Background Check is Ordered

[Preview Consent Form](#)

Include Child Safety Training - Toggle to choose if the Child Safety Training will be ordered in the Screening Flow

Include Billing Reference - Toggle to choose if a Billing Reference will be added to the order

- To add Screening Flows to your workflows, please view this documentation:

[AddScreeningFlowFunctionalityToYourExistingWorkflow.docx](#)

Background Check Status

As soon as the online consent form invitation is sent out or a manual order has been submitted, you will be able to view the status of the background check

- **Pending** - The background check or Child Safety Training is in progress
- **Invited** - The online consent form link has been sent to the candidate, but the form is not yet completed
- **Completed** - The background check is complete and ready for your review
- **Incomplete** - The background check could not be completed due to missing information, invalid jurisdiction, no applicant address history. For the Child Safety Training, this status means that the candidate has not passed the test
- **Expired** - The candidate did not respond to the online consent form link or complete the Child Safety Training in the allotted time. The time frame is defaulted to 14 days
- **Rescreen** - The applicant has a previously completed background check and is now due for another background check. The default time is 1 year but can be adjusted in the PMM portal
- **Archived** - The candidate has been archived in the PMM portal. This does not mean that the background check or candidate is inactive.
- **Success** - Child Safety Training status to indicate that the training has been completed and the applicant received their certification with a score of 70% or higher.

PMM Portal Settings

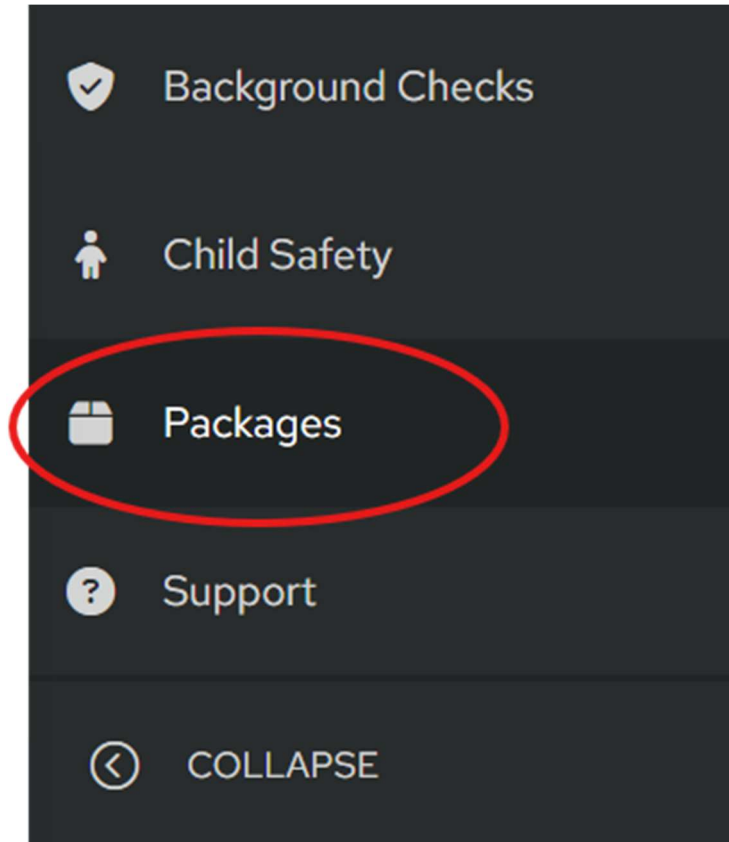
Create Background Check Packages

The default background check packages will be the Essentials, Preferred, and Premiere.

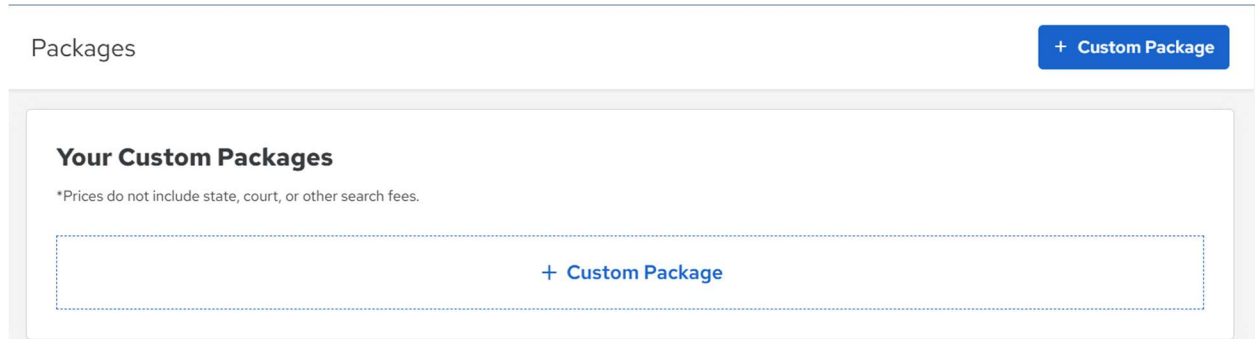
- **Essential** - Multistate Criminal Search (National Criminal Search), National Sex Offender Registry, SSN Trace, One County Criminal Search
- **Preferred** - Multistate Criminal Search (National Criminal Search), National Sex Offender Registry, SSN Trace, Unlimited Countywide Criminal Search (Auto Populated - 7 yrs)
- **Premier** - Multistate Criminal Search (National Criminal Search), National Sex Offender Registry, SSN Trace, Unlimited Countywide Criminal Search (Auto Populated - 7 yrs), Unlimited Federal by District Search (Auto Populated - 7 yrs)

If any other type of background checks need to be ordered, you may create a new custom package inside of the PMM Portal.

- Inside of the PMM Portal, click on "Packages" in the left side menu



- Click on the blue Custom Package in the upper right or click on the Custom Package under "You Custom Packages"



- Name the new package. This can be named whatever, it will be internal for you and other users.

What would you like to name this package?

Tip: Use a name that will help you remember the purpose of this package and its searches, as it will be the package name that appears when selecting your orders. This package name will not appear in reports.

Next >

- You will be able to choose a Base Package (one of the default background check packages) or check the checkbox on the bottom "I do not wish to have a base package as part of this custom package"

Choose your Base Package

	Essential	Preferred	Premier
	<input type="radio"/> Selected	<input type="radio"/> Select	<input type="radio"/> Select
Multi-State Criminal Search	✓	✓	✓
National Sex Offender Registry Search	✓	✓	✓
SSN Trace	✓	✓	✓
County-wide Criminal Search (Auto-Populated - 7 years)	One	Unlimited	Unlimited
Federal by District Search (Auto-Populated - 7 years)	-	-	Unlimited

I do not wish to have a base package as part of this custom package

- Click on "Continue to Add-Ons" to the right side, under Summary

Summary

NAME

Test 

Base Package

Essential Package

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possible records
- ✓ One Countywide Criminal Search (Auto Populated)

[Continue to Add-Ons](#)

- You will be able to choose individual searches to this custom package from this list of Add-Ons

Choose your Add-Ons

Motor Vehicle Records Search

[^ Motor Vehicle Report](#)

+ Add

Criminal Records Search

[^ National Combo Search](#)

+ Add

[^ National Sex Offender Registry](#)

+ Add

- Click on "Save Package" to the right side

Base Package

Essential Package

- ✓ Multistate Criminal Search
- ✓ National Sex Offender Registry
- ✓ SSN Trace
- ✓ Automatic re-verification of records and possible records
- ✓ One Countywide Criminal Search (Auto Populated)

Add-Ons

Motor Vehicle Report



Save Package

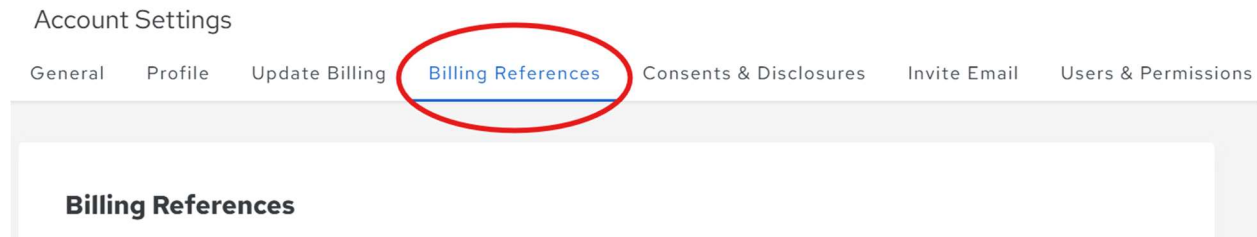
Create Billing References

Billing References are labels that will group up candidates on your invoice. You are able to attach the Billing Reference to a candidate while ordering the background check.

- To create a Billing Reference inside of the PMM Portal to add them to the background checks, click on the gear icon in the upper right hand corner



- Then select Billing References



- This page will display any Billing References that would have been created. Click on the New Code button

Billing References



These codes can be used to tag background check orders by billing groups.

[+ New Code](#)

Title
No records to display.

- Under the "Title" table, a new field will open for you to type in
 - This can be named anything and this will display on your Invoice

Title

Make Default  

- Click on the save icon to save the Billing Reference.
 - Make sure to add/save each billing reference as you go and refresh each time. Otherwise, it causes some issues.
- The Make Default button will have this Billing Reference automatically appear to be attached to the candidate that you order background checks on.

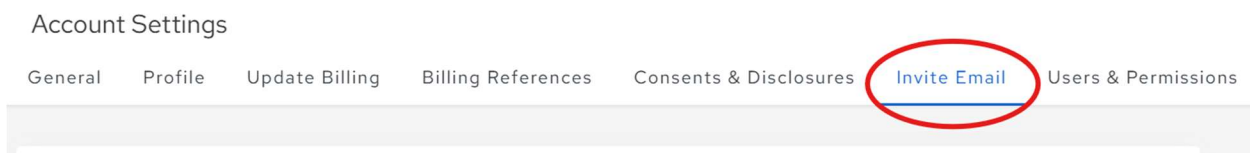
Edit Email Templates

When you send out the Online Consent Form invitation to the candidate to have them enter in their own information and give consent online, an email will be sent with the link to the Online Consent Form.

- You are able to edit the email message that is sent to the candidate by going into the gear icon in the upper right hand corner



- Then select Invite Email



There will be our default email template, which you can edit by clicking on the Edit to the right of the Default template.

- To make a new email template, click on the "+ Email Template" in the upper right or the "+ Email Template" under the Default template.
 - Whether you're editing the Default template or creating a new email template, you **MUST** make sure the following tags are entered

in: [ApplicantFirstName], [ApplicantLastName], [ClientName] and [InvitationLink]

Invite Email Templates

✔ Background Checks

+ Email Template

This is the email your applicants receive when you invite them to complete a background check. Select "+ Email Template" to create and save custom email templates that suit your organization's needs.

Sort By Newest First Search

Default
Last Edited on 03/12/2025 by System

Active

Default

Edit ▼

+ Email Template

- You'll be able to edit the email, the subject line, the name of the template, and the body of the email. The only thing you won't be able to edit is the From email address.

Edit Email

Edit Email

Customize the fields on the right to create an email for a specific use case.

Important

[ApplicantFirstName], [ApplicantLastName], [ClientName] and [InvitationLink] are required tags in the email body.

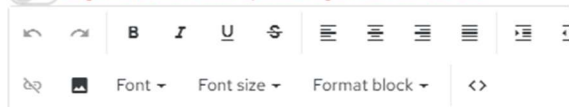
Email Template Name
Internal Use Only. Example: "Volunteer Email"

[ClientName]

From
message@mobilizemyministry.com

Subject Line
255 characters remaining

Insert logo as header
 Logo not found. Please upload a logo in the General tab.



- Email Template Name** - This will be an internal name to help you locate email templates while sending out the Online Consent Form invitation
- Client Name** - As of now, this field does not effect anything

- **From** - The email address that the email comes from for your candidates
- **Subject Line** - The subject of the email
- **Email Message** - The body of the email.
 - Please make sure to include the tags **[ApplicantFirstName]**, **[ApplicantLastName]**, **[ClientName]** and **[InvitationLink]**. These tags will auto populate the applicant's first name, the applicant's last name, your organization's name, and the specific link to the Online Consent Form.

Add New Users

You will be able to add new users to be able to order background checks from Planning Center. The users will need to go through the Authenticate process to set up the integration with their user.

- To add a new user, go into the gear icon in the upper right hand corner



- Select the "Users & Permissions" tab

Account Settings



- If you are the owner (the person who signed up the account), you will see a Roles & Permissions section. Scroll down to view all the users in your account and to be able to add a new user by clicking on the + User

Users





All (39) Full Admin (26) Limited Admin (1)

Name	Email	Role	Date Added	Last Active
------	-------	------	------------	-------------

- Enter in the new user's information, then choose the permission they will have

Add a new user ✕

 **User Information**

 **Role Permissions**

CancelSave Changes

Full Admin - User has access to the entire account. View background check results, archive background checks, edit billing information, create a custom package, create and delete users, edit disclosure and consent, edit invite email template

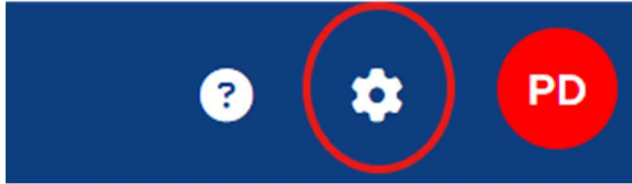
Limited Admin - User will only have the ability to send out the online consent form link for a background check and send out the Child Safety Training link, if the feature is added onto your account.

Edit Rescreen Interval

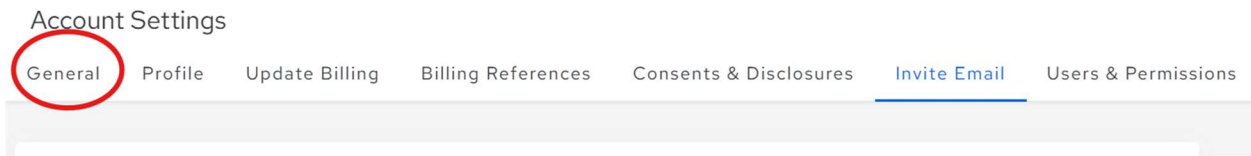
Once a background check is ordered, there will be a certain amount of time before a background check needs to be reran. Every organization has different time frames when ordering a new background check on a current candidate.

You will be able to see the candidates that need a new background check in the Background Check Dashboard

- Go into the gear icon in the upper right hand corner



- You will automatically be in the General tab. If not, please select General.



- Scroll down a little, under Notifications, to Applicant Invitation Expiry Interval

Applicant Invitation Expiry Interval
Choose when you want applicant invitation emails to expire after they are sent.

Rescreen Interval - Background Checks
Choose how often you want us to let you know an applicant needs to be rescreened.

Retraining Interval - Child Safety Training
Choose how often you want to be notified that an applicant needs to be retrained.

- The default interval is 1 year, but can be adjusted to 6 months.
 - If you need a different timeframe, please contact support@protectmyministry.com

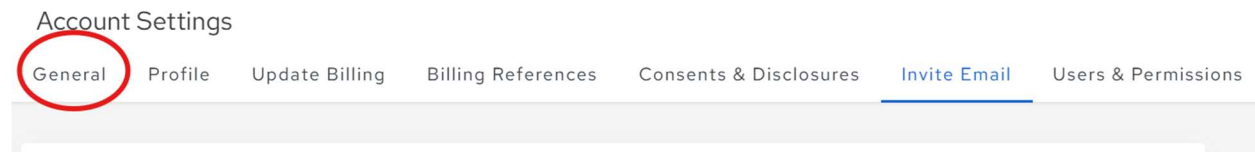
Edit Invitation Expiration

Through the PMM Portal, there is a way to update how long an Online Consent Form invitation link will expire.

- Go into the gear icon in the upper right hand corner



- You will automatically be in the General tab. If not, please select General.



- Scroll down a little, under Notifications, to Applicant Invitation Expiry Interval

Notifications

Choose how and when we contact you. We may still send you important notifications about your account outside of your notification settings.

Notify me when...

- There are report updates
- An applicant invitation is sent
- An applicant invitation is expired

Applicant Invitation Expiry Interval

Choose when you want applicant invitation emails to expire after they are sent.

2 weeks

Rescreen Interval - Background Checks


Choose how often you want us to let you know an applicant

6 months 1 year

- The default expiration is 14 days (2 weeks), but can be adjusted to 1 week or 1 month.

Applicant Invitation Expiry Interval

Choose when you want applicant invitation emails to expire after they are sent.

2 weeks 

1 week

2 weeks

1 month

Rescreen Interval - Background Checks

Choose how often you want us to let you know an applicant