Background Checks with Protect My Ministry

Protect My Ministry

This is a third-party vendor that processes background and credit checks. As part of Volunteer Management, TouchPoint integrates with Protect My Ministry to make it easy for you to request these for your volunteers or employees. Our integration allows you to request these directly from a person's record in the database.

In order to use this feature, your church will first need to establish an account with Protect My Ministry. Once you have an account, you will have a username and password for the church.

Note

The billing for the background checks is between your church and Protect My Ministry. There are no added fees from TouchPoint associated with this feature. You pay Protect My Ministry directly.

Required Settings

Your System Admin must set up the following settings.

See also

Settings

EnableBackgroundChecks

true

PMMAPIKey

Your API secret key

Warning

Setting **EnableBackgroundChecks=True** without entering your **PMMAPIKey** will result in an error on a person's Volunteer tab.

Required User Roles

Assign the following roles to the user(s) who will use this feature. Your System Admin can add these roles if they are not already in your database.

See also

New Users And Roles

ApplicationReview
: This is needed to access the Volunteer Application Review page.

BackgroundCheck
: This is needed to request standard background and DMV checks.

CreditCheck
: This is needed only if you need to request credit checks.

Note

If you never run credit checks, you will not need the CreditCheck role.

Now your database is ready to begin using Protect My Ministry for background checks.

Labels in Protect My Ministry

If you have an existing account with Protect My Ministry and are currently using Labels on their site, you have the option to use them in TouchPoint as well. This requires adding special settings as well as adding the labels in the Lookups.

The purpose of labels is to distinguish background checks for different purposes. PMM displays these labels on their billing. Examples: Pre-Employment; Re-Check; Volunteer.

Setting
: Add the follow setting (case-sensitive) and add the value as *true*:

  EnableBackgroundLabels

  See also

  Settings

Lookups
: Add the labels you have in PMM to the *Lookups > Misc > BackgroundCheckLabels*.

  See also

Lookup Codes

Caution

Make sure the labels in PMM and the labels you add to TouchPoint are the same.

Request a Background or Credit Check

To use our integration with Protect My Ministry, please read the companion article for step-by-step instructions for getting your database ready to use this feature.

Important

If you had an existing account with PMM, you will still need to request the username/password from Protect My Ministry for your account. The one you used on their site will not work in the API.

Background Check

Step 1

Go to the *Involvement > Volunteer* tab on the people record of the person needing the background check.

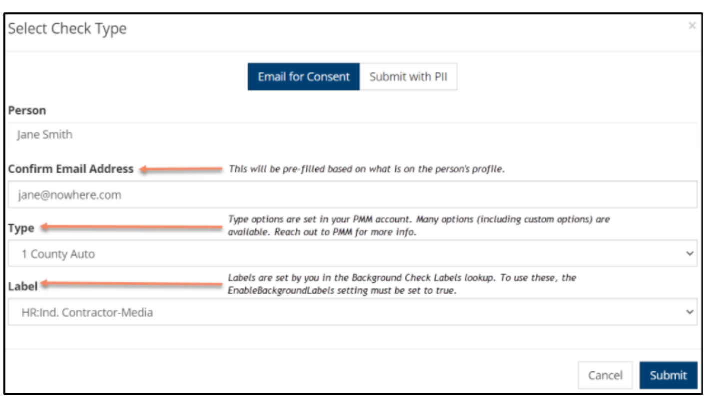
Step 2

Click the green *+ Add New* button in the Background Checks section.

From here you have two options to choose from.

- Email for Consent
- Submit with PII

Option 1 - Email for Consent¶



Protect My Ministry¶

Step 3

Confirm the Email Address of the person needing the background check.

Choose the Type from the dropdown.

Note

Type is set in your PMM account. Many options (including customized options) are available. Reach out to Protect My Ministry for more information.

If you are using Labels, select the correct Label from the dropdown. Reminder: Labels are setup in *Lookups > Misc > BackgroundCheckLabels*.

See also

Lookup Codes

There are 4 additional fields when using MinistrySafe.

- **Over 13**: Check this box to confirm that the background check requestee is over the age of 13.
- **Child Serving Role**: Check this box if the serving role involves working with or around children.
- **Type**: Choose whether the background check requestee is a Volunteer or Employee
- **Salary Range**: If the background check is for employment, choose the appropriate salary range.

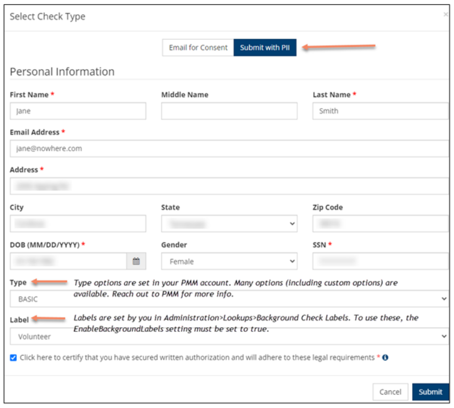
Step 4

Click Submit

An email with a personal link will be sent to the person needing the background check. They will be able to submit their background check from that email.

Once you have submitted a request, you will see the status: *Waiting* or *Completed*. Completed checks will have a link to view the report.

Option 2 - Submit with PII¶



Protect My Ministry

Step 3

Fill in all fields with a *. Those are the minimum requirements and all you will need for MOST background checks. *Make sure you are aware what the requirements are based on the Type you are using.* Reach out to Protect My Ministry for more information.

SS and License Numbers

The SS # and License # are used only to submit the form to PMM. They are not stored on a person's record in TouchPoint. However, if you have requested a background check previously for this person that information will be retrieved and will populate those fields at the time you submit the form.
Choose the Type from the dropdown.

Note

Type is set in your PMM account. Many options (including customized options) are available. Reach out to Protect My Ministry for more information.
If you are using Labels, select the correct Label from the dropdown. Reminder: Labels are setup in *Admin > Advanced > Lookup Codes > Miscellaneous > BackgroundCheckLabels*.

See also

Lookup Codes
There are 4 additional fields when using MinistrySafe.

- **Over 13**: Check this box to confirm that the background check requestee is over the age of 13.
- **Child Serving Role**: Check this box if the serving role involves working with or around children.
- **Type**: Choose whether the background check requestee is a Volunteer or Employee
- **Salary Range**: If the background check is for employment, choose the appropriate salary range.

Check the required acknowledgement and then click Submit.

Note

Under *Admin > Advanced > Special Content > HTML Content*, there is a `BCMCertificationPopover` file. This is where the acknowledgement message is stored.

Once you have submitted a request, you will see the status: *Waiting* or *Completed*. Completed checks will have a link to view the report.

Notifications¶

Once the report has been completed by Protect My Ministry, the TouchPoint user that originated the request will **receive an email** letting them know that the report has been completed.

The email will come from the TouchPoint Admin Email in the Settings for the church's database.

After receiving the email, they should go to the person's record *Involvement > Volunteer* tab, click the *Click Here for Report* link in the Report Link/Error colum to view the actual report. If any errors occurred, details regarding that error will be in that column instead of a link. You will then want to manually update the Approval column as necessary.

Credit Check¶

Customers wanting to add this to their account will need to reach out to Protect My Ministry .

A *Credit Check* is requested very similarly to the Background Check.

Step 1

Go to the *Involvement > Volunteer* tab on the people record of the person needing the credit check.

Step 2

Click the green *+ Add New* button in the Background Checks/Credit Checks section. Choose the option Submit with PII. You will see the option **PMM Employment Credit** under the Type dropdown.

Mass Background Check Requests¶

From an Involvement, Tag, or Search Builder, go to the Gear Icon of the Blue Toolbar to initiate background checks on the list of displayed people, using the Email for Consent option. The pop up window will indicate how many people will be sent the email based on those that have email addresses on file. Submit for PII is not available for this method. This section is only visible to those with the appropriate BackgroundCheck, BackgroundCheckRun, or MinistrySafeClasses role.