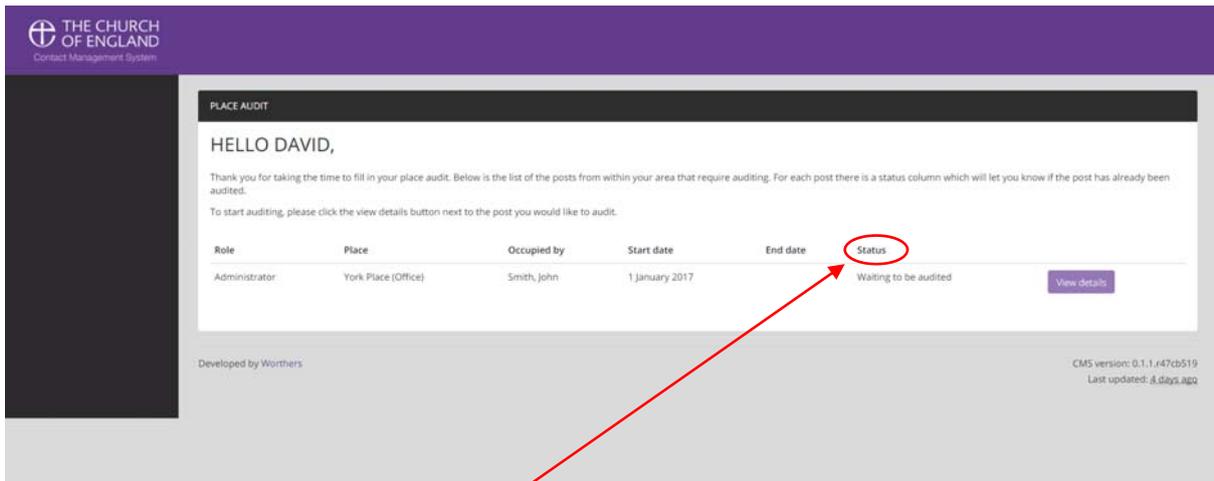


Audit of Parish Officers 2018

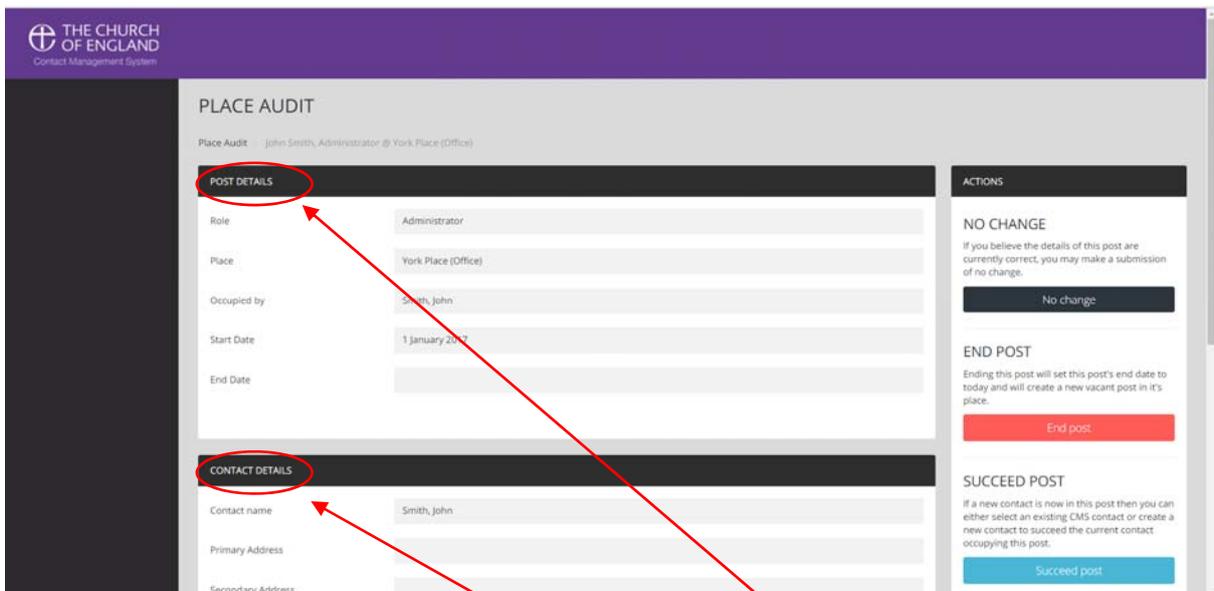
Instructions

When you click on the link to the Parish Audit, you'll be taken to a screen that looks like the one below (although the names listed will be your parish officers as currently recorded on our diocesan database).



Each parish officer listed has a **status**, which will indicate whether they still need to be audited, or in what way the details have been amended.

To audit an officer, click on the **View Details** button on the right-hand side of the entry. This will bring up a screen that looks like the one below.



On this screen, the information in the **Contact Details** box and **Post Details** box are for information only and are **not amendable**.

If the officer you're auditing is remaining in their post but there is an error in any of the information in these two boxes, please make the necessary amendments in the **Are these details incorrect?** section.

There is no need to add postal addresses or phone numbers – we will get those from the officers themselves.

Telephone

Email Address john.smith@leeds.anglican.org

ARE THESE DETAILS INCORRECT?

If these contact details are incorrect and you would like to submit some alternative details, please write the new details in the box below and click save.

Save

Back to place audit

If you enter anything in the **Are these details incorrect?** section, you will need to click the **Save** button before continuing.

The main part of the Audit happens through the **Action Buttons** on the right hand side of the screen. **One of these buttons needs to be clicked for the audit of that officer to be completed.**

ACTIONS

NO CHANGE

If you believe the details of this post are currently correct, you may make the decision of no change.

No change

END POST

Ending this post will set this post's end date to today and will create a new vacant post in its place.

End post

SUCCEED POST

If a new contact is now in this post then you can either select an existing CMS contact or create a new contact to succeed the current contact by copying this post.

Succeed post

- If the existing officer remains in the same post, click the black **No Change** button.
- If the existing officer has resigned or retired and there is no replacement yet, click the red **End Post** button. You will be given the opportunity to end the post on today's date or to set a date in the future. In all cases, please tick the box to create a vacancy.

- If the officer has resigned or retired and someone new has been appointed, please click the blue **Succeed Post** button, enter the e-mail address of the *new* officer, then click **Search for contact**.
- If this person already exists on the database, you will be able to **assign the new post** to them. If they do not already exist on the database, you will be able to **request creation of a new contact**. This is then done by the diocesan office.

Once the audit process has been repeated for all the officers (and the status of each officer shows that an audit has been completed) the job is done! **There's no need to click a Submit button** – that happens automatically.

Two things to note:

- It is possible to leave the audit and come back to it later using the link. However...
- More than one person can work on the audit, so you may find statuses changing unexpectedly!

When complete, the audit is available to David and Nicola at the diocese, who will moderate the entries and update the diocesan database. They will be in touch if there are any queries to resolve!

Thank you!