

Peace of mind through
common sense security.



Protect My Ministry 2.0 & Rock RMS

September, 2020

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Setting Up Protect My Ministry 2.0

Install Plug-In

Protect My Ministry 2.0 is not part of the Rock core. You will need to go to your Admin Tools (toolbox icon) and select the Rock Shop. From there, select the General tab and scroll to our icon. Once it is installed, enable it as your default background check provider. (this will not cause you to lose any of your previous background check reports.



Enter Credentials

Home>System Settings>Protect My Ministry 2.0

You will receive a username and password specific to this new integration. If you are an existing Protect My Ministry customer, you will most likely be sent a new username and password for this integration as the configuration is different. Please do not attempt to use your existing credentials unless our support team emails those to you after they have completed processing your new enrollment form for this integration. If you find you are unable to view your “Background Check Types”, it is likely due to invalid credentials. Please confirm those with the ones sent in your confirmation email and make sure no extra spaces have been entered during data entry or copy/paste.

Confirm Webhook

Home>System Settings>Protect My Ministry 2.0

Each customer has a unique result webhook. This URL must have a valid security certificate, or we will not be able to return all results to your server. Please confirm you have submitted this webhook to us during the sign-up process and that it has not changed. If, at any time, you find you are not receiving some of your results, it will be necessary for you to confirm this webhook has not changed or had the

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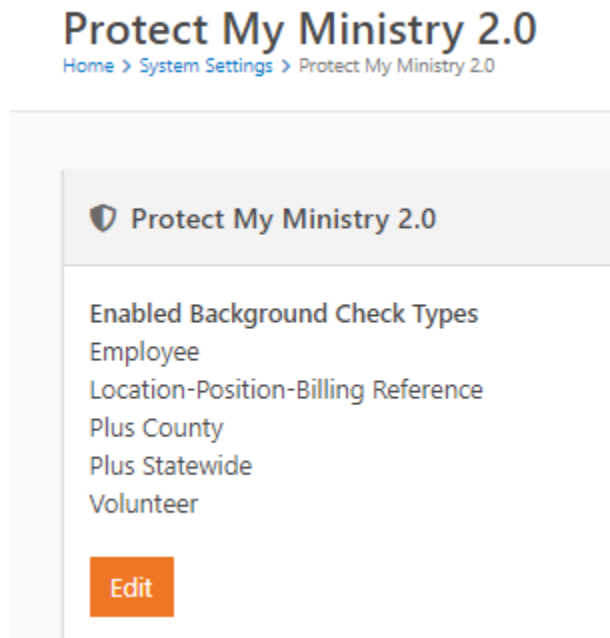
security certificate renewed since initial import. If either of these situations has occurred, [please submit a ticket \(email support@protectmyministry.com\)](mailto:support@protectmyministry.com) with a copy of your webhook and ask us to confirm we have the most recent one on file.

Background Check Types

Home>System Settings>Protect My Ministry 2.0

Background Check Types are the packages enabled for your account. They can be named by our package name or by a position or location for your organization that would be easier to select during the ordering process. You can name your types such as Employee, Volunteer or Campus Name + package. This is intended to simplify your ordering process since you may not always remember which type of package to order for an applicant or when multiple people are handling the ordering process. Clicking on the 'edit' button next to the Background Check Types will open a description of what is included for that 'type'. There is no limit to the amount of types you can have or the level of customization you need to satisfy your ordering process. We offer continuous monitoring, drug screens, social media screening etc. [Please contact Support@protectmyministry.com](mailto:Support@protectmyministry.com) to learn more about our offerings.

**If you cannot see your types, you have entered the wrong username and password for your integration and need to go to the Users tab and confirm the user has the username and password provided to you after sign up.*



The screenshot shows the 'Protect My Ministry 2.0' settings page. At the top, there is a breadcrumb trail: 'Home > System Settings > Protect My Ministry 2.0'. Below this, a header section contains a shield icon and the text 'Protect My Ministry 2.0'. The main content area is titled 'Enabled Background Check Types' and lists five items: 'Employee', 'Location-Position-Billing Reference', 'Plus County', 'Plus Statewide', and 'Volunteer'. At the bottom of this list is an orange 'Edit' button.

After clicking the edit button:

Background Check Types		
Below are the background Check types that have been configured for this account at Protect My Ministry. For each type, select the person attributes that should be updated when a request of that type is completed.		
Name	Included Packages	Person Attributes
☰ Employee	BASIC	Background Checked, Background Check Date, Background Check Document, Background Check Result
☰ Location-Position-Billing Reference	BASIC	Background Checked, Background Check Date, Background Check Document, Background Check Result
☰ Plus County	PLUS County	Background Checked, Background Check Date, Background Check Document, Background Check Result
☰ Plus Statewide	PLUS Statewide	Background Checked, Background Check Date, Background Check Document, Background Check Result
☰ Volunteer	BASIC	Background Checked, Background Check Date, Background Check Document, Background Check Result

To have additional types added or existing types re-named, please send your request to Support@protectmyministry.com

User Accounts

Home>System Settings>Protect My Ministry 2.0>Edit>User Accounts

When you first installed the plug in, you had to enter a username and password. This was not validated by our system at that time and could be incorrect. Please go to your User Accounts tab and confirm the username(s) and password(s) match what was sent in your confirmation email. If these are not correct, you will not see your Background Check Types and/or will have orders fail.

To edit a user, hover over the name you wish to edit and click. A window will open with that user's name, title (required) and the required username and password. The username and password must match what was sent to you. If you add new users to this area, they will not work with the integration unless Protect My Ministry has installed them first on their end. If you need to change a password for security purposes, please let our staff know so they can make the corresponding change on their end.

First User ✕

Title *

Active

Description

Username *

Password *

Ordering Background Checks in Rock Using Appscreen (electronic consent process)

How to Order

Rock>Search for Applicant>Select Background Check (PMM2.0) from Actions drop down.

The screenshot shows the Rock RMS interface for a user profile. The user is John Doe, a Visitor at Main Campus, 39 years old, male, and married. The 'Actions' dropdown menu is open, and a green arrow points to the 'Background Check (PMM 2.0)' option. Other options in the menu include 'Download vCard', 'DISC Request', 'Person Data Error', and 'Photo Request'. The 'Security' tab is selected in the bottom navigation bar.

User will then select 'type' from the drop-down menu (required), select Campus (not required and does not have any impact on our integration) and Submit.

Please complete the form below to start the background request process.

Ann Happiness

Email ⓘ *

Background Request

Type ⓘ *

- Employee
- Plus County
- Plus Statewide
- Volunteer

Campus ⓘ

Errors During Ordering

If the user attempts to submit without the email address, an error will occur and need to be corrected.

Background Check (PMM 2.0)
Home > Workflow > Background Check (PMM 2.0)

Request Entry Admin 12/10/2019

Please correct the following:

- Email is required.

Background Request Details

Please complete the form below to start the background request process.

Sarah Simmons

Email ⓘ *

Background Request

Type ⓘ *

Campus ⓘ

Employee Main Campus

Duplicate Order Warning

If the applicant has already previously been screened, the user will also be warned and need to confirm that they wish to continue.

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Request Entry

Confirm Background Request

Sarah already has these requests that are currently in progress:

- Unknown type of request started on 12/10/19 with a status of Initial Entry
- Employee request started on 12/10/19 with a status of Waiting for Submit Approval

Are you sure you want to continue with this request?

Approval Process

If the ordering user is not an approver, they will be notified the order has been submitted and is awaiting approval. If they are an approver, they will be directed to the approvals page. (Approval persons will also be notified via email and on their dashboards, when an order is awaiting their approval.) Once the order is approved, the status for the applicant will show “Waiting for Results” and will remain that way until the applicant completes the online process and the order gets sent to PMM.

Request Entry Admin 12/10/2019

Background Request Approval

The following background request has been submitted for review.
 If you approve the request, it will be sent to Protect My Ministry to begin the background check process for Sarah Simmons. Sarah Simmons will then get an email asking them to login and fill out the information needed to complete the request (SSN, Address, etc.).
 If you deny the request, it will be sent back to the requester (Daniel Peak). If you deny the request, please add notes explaining why the request was denied.

Requester Daniel Peak	Person Sarah Simmons	Campus Main Campus
---------------------------------	--------------------------------	------------------------------

Reason
Child education volunteer

Type **User Account** **Process Manually**

Note

Manual Background Check Orders (not using electronic consent process)

Only users that have approval permissions can order a background check manually. At the time of approval, there will be an additional field titled Process Manually (see last image) that they will need to change from the Default “No” to “Yes”. This will trigger a pop-up window where the user can select the package to order manually. They will be warned that they will be required to provide any required information necessary to complete the order which can include SSN, Driver’s License number etc.

The screenshot shows a web application interface with a navigation bar at the top containing links: Home, Order a Report, My Account, My Apps (highlighted in red), Documents, Look-up, Help, and Log Off. Below the navigation bar, the applicant's name is listed as "APPLICANT: Reuben Stanley". The main content area is divided into two sections. On the left, under "Available Services", there is a prompt "Select a package and/or service." and a list of "Packages" with radio buttons: None (selected), 1 County Auto, BASIC, PA 153 Package, PLUS County, and PLUS Statewide. Below the list is a button labeled "Order Background Check". On the right, under "Send invitation to applicant", there is a text box for "Applicant's Email Address" containing "jennifer.fowler@ministrybr". Below this is a dropdown menu for "Select the invitation configuration to use for this applicant:" with "Employee (Test Rock 2.0)" selected. A "Send Invitation" button is located at the bottom of this section.

Background Check Requests

All Requests

Home>System Settings>Protect My Ministry 2.0>Requests

This “Requests” log allows you to view all orders that have been submitted. **Please keep in mind that an order using Appscreen will not go to Protect My Ministry UNTIL the applicant completes the online form. Therefore, the status you see in Rock that says “Waitng for Results” can refer to orders that were placed manually that PMM has in their system as well as orders that do not get created UNTIL the applicant completes the online form.** Any links sent that are not completed within 60 days will become disabled (there are no charges for these orders since they never made it to our system). To re-order, simply place the order again from Rock. Users can use the ‘filter’ option to search for reports by name, completed date range etc.

Users with access can also view a pdf for each completed report from the Requests section.

Log

The log icon is used to open the order request and response XML. This will be helpful to access when troubleshooting a failed order. Support will often ask for information from this area.

Record Found

Customers using our Risk Assessment process can take advantage of automated workflows in Rock that will move applicants whose results meets their ‘Pass’ criteria. if the returned “Status” is equal to “Pass”,

it will not set the “Record Found” flag and the order will not show “yes” in the Record Found column. If the status is anything besides “Pass”, or a status is not returned, the “Record Found” flag will be set. The staff person will then be able to manually pass or fail the request, but that will not update the “Record Found” flag at all. This is a different process from the original integration so *please email Compliance@protectmyministry.com to learn more about Risk Assessment.*

Gears Icon

Clicking the gears icon for an individual will take the person to the workflow detail page. The details and activities for each order will be found here.

Appscreen Process (The view from an applicant’s perspective)

Applicant Process

- The applicant will receive two emails. One email contains the link to our myApp portal and the username which will be their email address, and the second email will contain a temporary password that they will be instructed to change after logging in for the first time. The email is generic to explain what our myApp portal is and how they can access it later in case any further information is needed from them later such as additional disclosures or the ability to view their results if you have allowed this in your set up.
- After applicant sets their password, they will begin the online process
- Applicant reads the introduction (this can be customized by your organization) and may review the Summary of Rights.



Home Log Off

This can all be customized by your organization!

(sample) Our user friendly system will now guide you step by step through the process of entering information that is necessary to complete your background investigation. The process will take approximately 10 minutes to complete.

Enter your personal information in each field where it is requested. Please be sure to be as detailed and accurate as possible. Omitting or incorrectly entering information could affect the results of your background investigation.

If along the way you find that you do not have all of the necessary information to complete the process, you may stop and come back to finish at a later time.

[Click here to get started.](#)

Compliance Documents

[Summary of Rights](#)

- Applicant reviews the electronic records and digital mouse signature information and provides their acceptance of this process and their signature

ELECTRONIC RECORDS AND DIGITAL MOUSE SIGNATURE

This section will describe how you can electronically sign documents required for purposes of completing your background investigation for employment or volunteer purposes, as well as how you can receive electronic documents related to the background investigation. During this process, you will be asked to "sign" one or more of the online documents with a Digital Mouse Signature. Please read the following carefully regarding receipt of electronic documents through this online portal and the Digital Mouse Signature process. Below will guide you through the process of providing consent through an electronic signature, referred to here as a Digital Mouse Signature.

Receipt of Electronic Documents

You can choose to have the electronic documents required for purposes of the background investigation provided or made available on paper or in non-electronic form. You can also decide, at a later point, to withdraw your consent to have a record provided or made available in an

I agree to the terms of this agreement. I do not agree to the terms of this agreement.

Please sign



Continue

- Applicant supplies any required information not sent via Rock. This can include education and employment history, references, SSN etc.



Home Log Off

Please Provide all of your information as required below

First Name JENNIFER	Middle Name	Last Name FOWLER	
Suffix	Date of Birth	Social Security No.	Phone Number
Country United States	Street Address		
Zip code	City	State / Province Select State	

Have you ever used a different Name? If so please list any and all former names.

Other First Name	Other Last Name	Other First Name	Other Last Name
------------------	-----------------	------------------	-----------------

NOTICE – BACKGROUND INVESTIGATION

In connection with my application for employment or to serve as a volunteer with client, end user, or contractor, notice is hereby given that a consumer report and/or investigative consumer report may be obtained from a consumer reporting agency for employment purposes. These reports may contain information about your character, general reputation, personal characteristics and mode of living, whichever are applicable. They may involve personal interviews with sources such as your neighbors, friends or associates. The reports may also contain information about you relating to your criminal history, credit history, driving and/or motor vehicle records, education or employment history, or other background checks.

- Applicant provides electronic signature to confirm the accuracy of their information and releases their application. If the applicant lives in a state that requires other state notices be provided such as NY, CA, OK etc. we will have them confirm receipt of those notices as well.

Home Log Off

Order Confirmation Applicant Name & Address

The following disclosures are required to process this background check.


I have received **Summary of Rights** [View](#)

I have received **New York - Article 23-A of the NY Correction Law** [View](#)

I certify that all personal information and statements made by me related to my background investigation are true and accurate and that I have not knowingly withheld any fact or circumstance.

I authorize former employers, schools and other references to release any information required for purposes of this background investigation. I waive any right to receive any written notice from this organization or former employers that such information has been released.

I, JENNIFER SMITH, hereby certify that the above is correct.

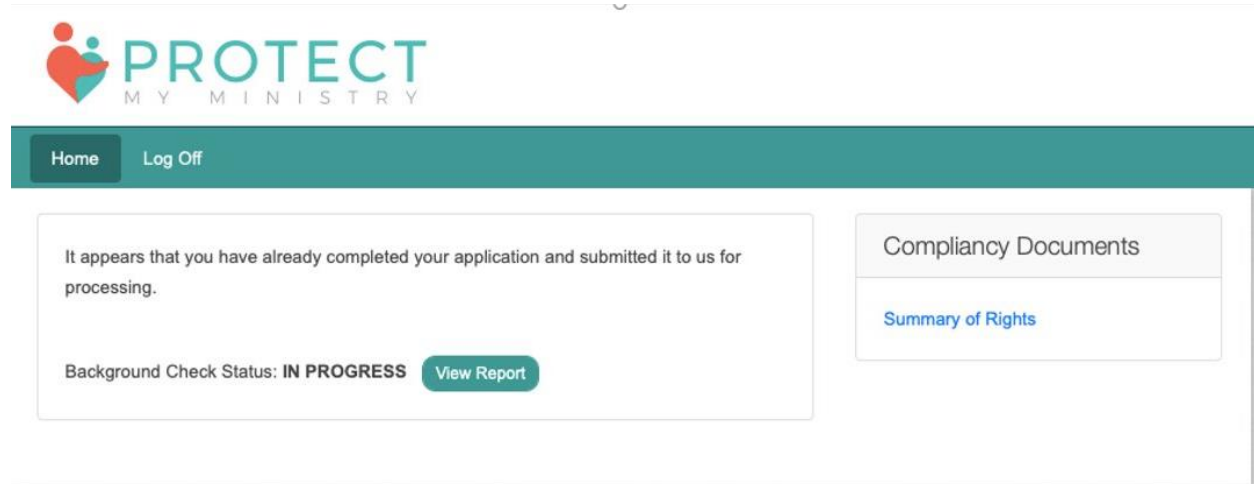
Please sign 

Your background check will be processed to cover the services displayed above. If you feel the information provided may be inaccurate click on the edit link displayed to the right of each service to review or even correct the details provided.

[Release My Application](#)

Optional- Applicant Allowed to View Results

Organizations can request that we enable a setting for their account that allows an applicant to view their completed report. If this is enabled, applicants can use their credentials to view the report once it is completed. The “View Report” button will allow them to see the status of all searches at any time.



The screenshot displays the Protect My Ministry web application interface. At the top left is the logo, which consists of a stylized red and blue figure next to the text 'PROTECT MY MINISTRY'. Below the logo is a teal navigation bar with 'Home' and 'Log Off' buttons. The main content area is divided into two sections. The left section contains a message: 'It appears that you have already completed your application and submitted it to us for processing.' Below this message, it states 'Background Check Status: IN PROGRESS' followed by a teal 'View Report' button. The right section contains a 'Compliance Documents' header and a blue link for 'Summary of Rights'.

Viewing Completed Results in Rock

Once the report completes, the user will get an email notification from Rock and view the report in the applicant’s profile. If the customer has signed up to use our Risk Assessment process and the report was scored as “Pass”, that status will trigger an automated workflow in Rock and indicate the “Pass” status in the Safety and Security section of the applicant’s profile. If the customer is not using our Risk Assessment process, the customer will need to manually review the report and assign the appropriate status. [To learn more about Risk Assessment, email Compliance@ProtectMyMinistry.com](mailto:Compliance@ProtectMyMinistry.com)

Updates to Completed Reports

There are times when a completed report will change. This occurs when an applicant disputes findings of a completed report that results in an amended result, when a customer adds a search to an existing completed report or when a customer is using our continuous monitoring and there is a change to an applicant’s record during that 12/24/36 month subscription window. When an updated report returns to Rock with the Protect My Ministry 2.0 integration, a new workflow process will kick off, alerting the user to a new report. The new report will force the Background Checked status to change to No and remove the Pass status until the new report is reviewed and the new status is assigned.

Person Profile **Extended Attributes** Groups Contributions Benevolence Security History

Membership

Do Not Send Giving Statement No
Baptized Here No

Social Media

Visit Information

Childhood Information

Safety & Security

Background Checked Yes
Background Check Date 12/22/2019
Background Check Result Pass
Background Check Document [View](#)

Family Analytics

Employment

Education

Help

If at any time you need additional support or want information on services mentioned in this user guide, please contact support by emailing support@protectmyministry.com

To Uninstall Protect My Ministry 2.0

To remove Protect My Ministry 2.0, simply select a different background check provider to be your default provider. But before you go, let us know what we can improve in order to remain your chosen provider!

