



Processes and standards for Safe Ministry record keeping guidance for PSMCs

The Parish Safe Ministry Co-ordinator (PSMC) plays a vital role in their parish as they are responsible for gathering and maintaining safe ministry documentation on the Safety Management Online (SMO) database for many involved in ministry in their parish,

The level of required screening is higher for those volunteers involved in ministry to children. Section D of the Bathurst Diocese's Safe Ministry Protocol and Guidelines for Screening outline the scenarios in which a volunteer would be seen as being involved in ministry to children, but it can be summarised by asking whether *'this volunteer is likely to be seen to be in a position of leadership or authority by a child in the congregation (member or visitor)?'* Therefore, those in 'up-front' positions (e.g., someone who reads the Bible or prays in front of the church, or who leads the music team) would be considered as being involved in ministry to children, but not a volunteer who mows the lawns or serves morning tea.

Gathering Safe Ministry documents

- 1. Determine volunteers and their roles in your parish.** Consult the Safe Ministry Protocol and Guidelines for Screening on the Bathurst Diocese website for which Safe Mi documents are needed for each role.
- 2. Contact the volunteer** to advise which documents they need and forward to them.
- 3. When the SM Check Questionnaire is received,** read through it thoroughly.
 - a. Check that it has been completed, with all questions answered.
 - b. If any questions have been answered "yes", make sure that they have provided a written explanation, and when received, send the diocesan office the scanned Form and written explanation. They will then check it and notify you of the outcome.
- 4. Phone referees nominated on the SM Form** to check suitability of volunteering in that role (there are no written forms to fill out for this).
- 5. Working with Children Check details,** volunteer's name and date of birth are to be forwarded to the Administrative Assistant in the Diocesan Office, Louise Hickey at: louise@bathurstanglican.org.au This is so that the WWCC number can be verified and an Anglican National Register check undertaken.
- 6. Upload safe ministry documents and details** to the SMO database using file naming conventions in the document "Entering Details on the SMO Database" below.

SRE teachers

The Diocesan Administration Assistant is to be notified of any new volunteer who wishes to be an SRE teacher. **An SRE teacher cannot begin to teach or assist in a classroom until they have received a Letter of Authorisation and Card from the diocesan office.** These will not be issued until all checks as outlined on Table 1 of the Safe Ministry Protocol and Guidelines for Screening have been completed by the PSMC and the prospective volunteer has completed the necessary professional development modules.

Entering details on the SMO Database

When SM documents are received from volunteers, they need to be recorded on the SMO database. Please follow the steps below and the file naming conventions, outlined at the end of this document, to maintain a streamlined database.

Each volunteer has an “Appointment” and “Training” button next to their name. When all documents have been entered on SMO as “Approved” or “Not Applicable”, they should both be “Green”. If any document is marked “Pending”, then the button will be yellow. When there are items which are marked “Not Submitted”, the button will be “Red”.

Personal Information

1. To add a new Volunteer, go to the “People” screen.
2. Type in the volunteer’s surname in the blank “church workers” tab to see if they have already been entered on the database.
3. If no details come up, click on the green “+Add Member” tab in the top right-hand corner.
4. **Enter Username** – the easiest to use is the volunteer’s name.
5. **Enter Name details.**
6. **Enter Email:** if the volunteer doesn’t have an email address, it can be left blank. But you need to press the spacebar once to fool the system into thinking that you have entered an email address. Once an email address is entered (or the spacebar is pressed) a computer-generated email from SMO / “Creating Safer Communities” will be sent to that email address with a link for logging into SMO with a password. The password will expire within 48 hours, but if the volunteer doesn’t log in within this time, you just need to go into their SMO folder and click on “Reset Password” under the email address tab, and this will automatically send another email link.
7. **Enter address, date of birth and gender details.**

Appointment Status

Working with Children Check

When the volunteer’s WWCC number and expiry date are received, please forward them with the volunteer’s name and date of birth to the Diocesan Administration Assistant, Louise Hickey on: louise@bathurstanglican.org.au. This will then be verified on the website of the NSW Office of the Children’s Guardian, as well as the Anglican National Register Check.

Status	Reference	Extra Information	Expires (dd-mm-YYYY)	ID Verified/Sighted
Approved	WWC02144521	blank	16-02-2024	Yes
Date Verified/Sighted	Verified/Sighted By			
20-06-2020	Karen Trafford			

Police Check

Not applicable for these roles. Set expiry to latest possible, to avoid it appearing in exception reports.

	Status	Reference	Extra Information	Expires (dd-mm-YYYY)	ID Verified/Sighted
Police Background Check	Not Applicabl			31-08-2038	No
	Date Verified/Sighted by Diocese				

Annotations: "Leave blank" points to Reference; "blank" points to Extra Information; "dummy expiry" points to Expires; "Leave blank" points to Date Verified/Sighted by Diocese.

Anglican Safe Ministry Check / Declaration

Form B for volunteers over 18, Form C for those under 18 and Form D for those not in Ministry to Children. Ensure this document is reviewed in full and any red flags raised with the diocesan office for advice. Set expiry date to align with WWCC expiry.

	Status	Reference	Extra Information	Expires (dd-mm-YYYY)	ID Verified/Sighted
Anglican Safe Ministry Check/Declaration	Approved	08-09-2020	Alissia Galbi	16-02-2024	No
	Date Verified/Sighted				

Annotations: "Date signed" points to Reference; "match WWCC expiry" points to Expires.

Anglican National Register Check + Anglican Professional Standards Clearance

Send volunteer's name and date of birth to the diocesan office for verification of Anglican National Register Check. The office will then update. Anglican Professional Standards Clearance is not applicable for these roles. Set expiry to latest possible, to avoid it appearing in exception reports.

	Status	Reference	Extra Information	Expires (dd-mm-YYYY)
Anglican National Register Check	Pending			
Anglican Professional Standards Clearance	Not Applicabl			13-03-2026

Annotations: "blank" points to Reference; "blank" points to Extra Information; "dummy expiry" points to Expires.

Bishop Licence

Not applicable for these roles. Set expiry to latest possible, to avoid it appearing in exception reports.

	Status	Reference	SRE Endorsement date	Expires (dd-mm-YYYY)
Bishop Licence	Not Applicabl			31-08-2038
		SRE Professional development date		
		SRE Observation date		

Annotations: "blank" points to the Reference field; "dummy expiry" points to the Expires field.

Role Interview & Endorsement + Referee Check

The PSMC is the endorser. As there is no current section for Faithfulness in Service (FiS) declaration, record status on extra information line for Role Interview & Endorsement. Date recorded is the date that the FiS declaration is signed.

Names of each referee must be provided and, unless explained in extra information, **must** match the names listed on the Safe Ministry Check. Referees must be spoken to by the PSMC and asked if there is any reason why the volunteer should not be appointed to the role. If any referee raises a concern, note in extra information, and seek advice from the diocesan office. Expiry date must align with expiry of Safe Ministry Check, **except** Referee Check #3 as this is not applicable for this role.

	Status	Reference	Extra Information	Expires (dd-mm-YYYY)
Role Interview & Endorsement	Approved	Kev Kevanna	Faithfulness in Service 08-09-20	16-02-2024
Referee Check #1	Approved	Fred Blogs		16-02-2024
Referee Check #2	Approved	Beryl Exempla		16-02-2024
Referee Check #3	Not Applicabl			31-03-2038

Annotations: "Name of endorser/referee" points to the Reference field of the first row; "name of reviewer" points to the Reference field of the second row; "Faithfulness in Service status on first line. Issues raised by referees." points to the Extra Information field of the first row; "match SM check expiry, dummy for #3" points to the Expires field of the first row.

Attached Appointment Documents

All uploaded documents are to be in pdf format. Only one document is to be uploaded per document type. Please don't scan in multiple documents such as SM check, DL, etc. in the one file. Select document type from drop-down menu.

The screenshot shows the 'Attached Appointment Documents' section. On the left, a dropdown menu is set to 'SM Check Questionnaire'. To its right is a dark grey button labeled 'Upload a file'. Further right is a dashed grey box containing the text 'Drop files here to upload'. Two red callout boxes with arrows point to the dropdown menu and the 'Upload a file' button.

Choose type of document from drop-down menu.

Click on "Upload a File" to find the pdf document on your computer.

Declarations

The volunteer is encouraged to log in and read through the "Data Security" and "Privacy" sections and tick the two "Not Ticked" boxes.

The screenshot shows the 'Declarations' section. It contains two sections: 'Data Security' and 'Privacy'. Each section has a paragraph of text and a red button labeled 'Not Ticked'. Two red callout boxes with arrows point to the 'Not Ticked' buttons.

Data Security

I declare that I am answering all questions and filling out all information herein truthfully and honestly. In completing my Safe Ministry checks and training I declare that I will not provide others access to my information.

Not Ticked

Privacy

I understand that the information in this system is confidential. Only those in the Diocese with clearance and appointed to Safe Ministry roles will be able to access my records. I understand that it will be kept secure in our confidential files, in accordance with the Privacy Act. Except as may be required by law, or by church disciplinary procedures, the information you supply will be used only for screening and disciplinary purposes. If required by law, the information you supply will be made available to the applicable authority.

Not Ticked

Training Status

This section is for entering the date of Safe Ministry Training (either Level 1 or Level 2). Tick the "offline" box and the date that SM training was completed in the "Completed Offline" date box. When you press "Save", it should then show an expiry date in an orange box next to "Training Status". In the notes box below, you can record the dates of training for both Levels 1 and 2.

If someone does online training through "Creating Safer Communities", it does not automatically generate a notification email to the PSMC or Diocesan Office, but the volunteer must forward the certificate to the PSMC for uploading.

Tick the "Offline" box if SM training has been completed, then press "save".

Training Status Ⓡ Training Not Commenced Expires: Ⓢ You have permission to change this data

Mandatory i Detail i Email i Reset i Offline i

Ⓡ SAFE MINISTRY TRAINING	Y	Not Started	N/A	N/A	<input type="checkbox"/>
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Circle will change to green when training is current and red when expired.

Expiry Date

Enter date of training.

Training Status Ⓢ Approved Expires: 24/01/2026 You have permission to change this data

Mandatory i Detail i Email i Reset i Offline i

Ⓢ SAFE MINISTRY TRAINING	Y	Completed offline 24/01/2023		<input type="checkbox"/>	N/A
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Organisational Information

Notes can be written in this section (including SM training info). If someone has been "archived" and you would like to "unarchive" them to be an active volunteer, then use the drop-down menu to choose "Active" in the "Status" box.

Organisational Information You have permission to change this data

SMO Member ID: 137216 Teams

External User ID (only numbers allowed):

Access Level: Church Worker

Status: Active

Created By: Louise Hickey (30 Sep 2022)

Member Expiry:

Notes:

Last Login: Never Logged In

Churchs

Add Church: ---Select A Church To Add To Users Church---

Church List:

- Anglican Bathurst Diocesan Registry
- Bathurst - All Saints Cathedral

Attached Documents

Safe Ministry training documents can be saved here, as well as SRE certification.

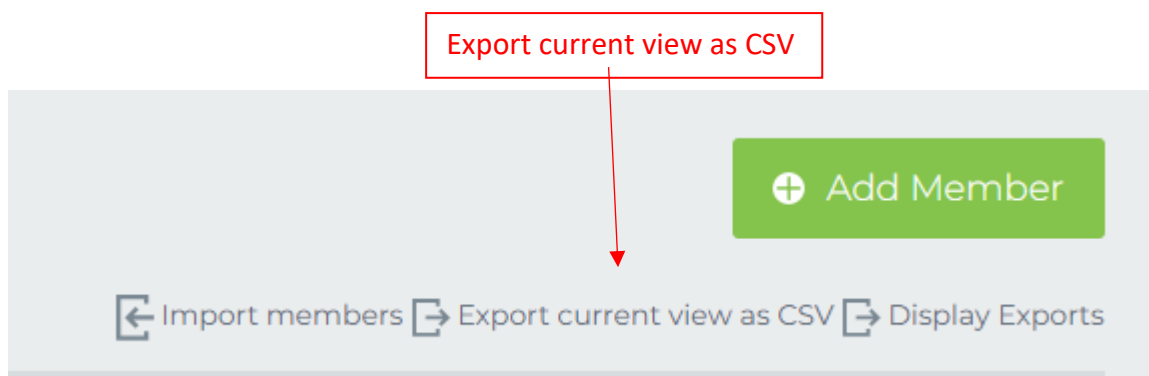
Attached Documents Any documents relating to this member

Upload a file Drop files here to upload

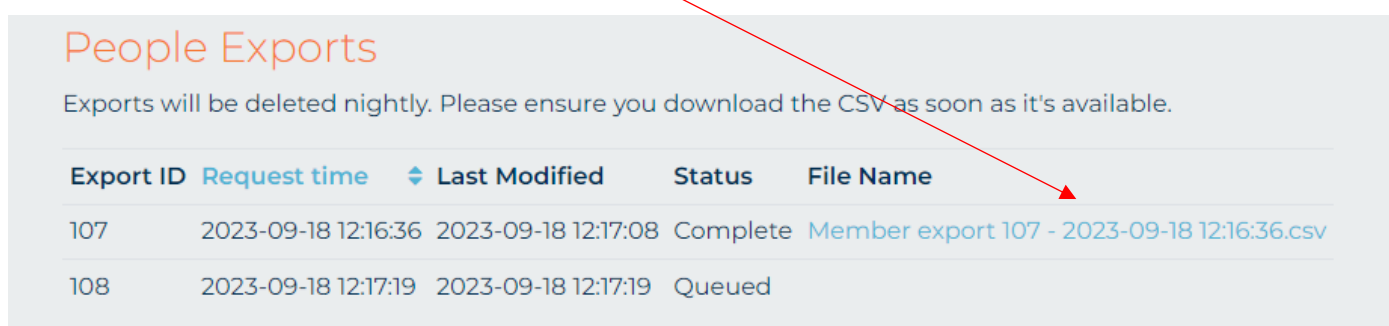
Running a Report from the SMO database

You can run a report of all your current volunteers, which includes data from their SMO folder, e.g. WWCC expiry dates, Safe Ministry checks etc.

To do this, go to the “People Screen” and choose “Export Current View as CSV” from the top right-hand side of the page, under the green “Add Member” tab. When you click on this, it should take you to the screen “People Exports”, indicating that it is downloading the file. When it’s ready – the “Status” should read as “Complete”. When you click on the blue “File Name”, it will download as a spreadsheet. You can then edit and delete unnecessary columns to make it a smaller, clearer spreadsheet.



Click on blue File Name to open spreadsheet.



Document naming and data entry conventions

These are to be filed in the first SMO section in “Attached Appointment Documents”. All documents need to be in pdf format.

Screening requirement	Document file name	Comment on file name
Safe Ministry Check	LASTNAME, Firstname SM Check 2020	Year of completion
Faithfulness in Service (Code of Conduct)	LASTNAME, Firstname FiS 2020	Year of signed declaration (one-page signed agreement only)

These are to be filed in the second SMO section (below the SM Training section)

Screening requirement	Document file name	Comment on file name	Date of completion
Safe Ministry Training Certificate	LASTNAME, Firstname SM Training Level 1 + 2 20 FEB 23	Date of course certificate on filename	Ensure this date is recorded in SMO training history and SMO will work out expiry.

If you have any questions or concerns about any of the above, then please do not hesitate to contact Louise Hickey at louise@bathurstanglican.org.au or 02 6331 1722.