Servant Keeper Background Checks Quick Reference Guide

Click <u>HERE</u> for Online Help (must be a registered user).

Click <u>HERE</u> for an online consultation for the correct background check(s) for your state.

Click <u>HERE</u> for access to online documents.

IMPORTANT: Make sure to check the **USER SECURITY** in the Administration Manager before registering. **Each user** that requires access to the Background Check button will need to have this option checked. The Background check option is located in the Membership Manager tab at the bottom of the screen. It is unchecked by default.

Setting User Security

Step 1: Open and log in to the Administration Manager.

Step 2: Click on the [User Security] icon. (See Figure 1)



Step 3 : Find the user that you would like to give access to the Background Check feature. Click once on their name to highlight it and then click the **[Edit]** button on the right. (See Figure 2)

Figure 2: After selecting the User ID, c the [Edit] butt	Servant Keeper Users User ID / User Name BERNADETTE Bernadette BOB bob ED Ed Newman JOHN John Bitner JOY Joy Sweet NEW New Guy SARAH Sarah SERVANT Servant PC Resou TECH SPCR Inc. Helpdes TEST Test TOM Tom Baughman	tes Inc.	
		Close	

Step 4: You will now see the User Access Privileges window for the selected user. If you go to item 10.0 in the list, you will see the "Background Check" option. Click the box to put a check mark in the Access column. (See Figure 3)

Figure 3:	User Access Privileges						×
U	User ID: SARAH		User Name	Sarah			
	[Restricted Fields Access]						
	Eull Access Read Only	O No Acc	ess (restricte	d) <u>Re</u>	stricted Field L	ist 🕜	
	Membership Contribution Administration						
			Image: Second				
	Access To Function	Access	Add	Update	Delete	Comments	•
	4.6 Export	 Image: A set of the set of the					
	5.0 Schedule Appointments	 Image: A set of the set of the	 Image: A set of the set of the	 Image: A set of the set of the	 Image: A set of the set of the		
	6.0 Attendance Tracking	 Image: A start of the start of					
	6.1 Change Date/Move Attendance Record	 Image: A start of the start of					
	7.0 Table Maintenance	V	V	V	V		
Check the hey	7.1 Modify User Definable Text	V					
Check the box	8.0 Picture Portrait			\checkmark	\checkmark		
to allow access	9.0 Print Reports	 Image: A start of the start of					
	10.0 Background Check	 Image: A start of the start of					=
to Background	11.0 View and Restore Deleted Profiles						+
Checks.			-			3929	
			2 Co	py Privileges	From	Save 😢	Cancel

Step 5 : Click the **[Save]** button to save your changes and return to the User Security window. Click the **[Close]** button and then exit the Administration Manager.

NOTE: Now that your user security has been set to allow your user(s) to do Background Checks, please follow the steps below on how to register for and submit your first Background Check.

Registering for Background Checks

If this is your first time using the Background Check service, you will need to go through a registration process to register with Protect My Ministry (the company who submits and processes the background checks). The registration process must only be completed once.

Step 1: Open and log in to the Membership Manager.

Step 2 : Click the [Find] button on the icon bar. (See Figure 1) The Find Record window will appear.



Step 3: In the "Search for Item" line, type in the name of the individual you plan to do the background check on. (See Figure 2) Click the **[Find]** button and you will see a list of individuals who match your search.

Figure 2.	Servant Keeper 7 - Main List	
	File Tools Individual Family Group Re	I Find Record
	Add Delete End	Search On Field: Name/Env #
		Contains Copy Copy Map Address Picture Include Disabled Records
	Select Group All Family Records	Image: International control of the internatinternatintereeee control of the international control of the int
	Find Household	Save As Select Fields Print List
	Directory Name	Last Name / First Name Home Phone Env #ionship Member Status
	And Immy & Nancy	Smith Nancy (555) 555-5555 W011 of Household Visitor
	Bitner, Boh & Joyce	Smith Laurel (717) 748-3094 79
	Bitner, Jack & Camille	Smith Jonathan (707) 398-1334 76
	🖴 Bitner, John & Brandi	Smith Maryanne (707) 398-1334 77
	🚨 Bitner, JoHon	Smith Randall (707) 398-1334 78
	Slackwell, Nick & Patty	Smith Cathy 336 145
	🖴 Boatman, Lee	Smith John 336 146
	🖴 Bond, James	Smith Bob 147
	Bovine, Bob & Elsie	There are 15 record (s) found
	Current Data Source - C: \Users\Public\Document:	s \Servant Keeper Database \ServantKeeperData.sk7db Logged On As: Sarah 🕏 Go to Version: 7.0.23 📰

Step 4: Double click on an individual to open their Individual Profile. (See Figure 3)

Step 5: Click once on the [Background Check] button. (See Figure 3)



Step 6 : The Run Background Check window will appear. (See Figure 4) Click on the **[Register]** button to begin the registration process.

NOTE: Before beginning the registration process, make sure that you are connected to the Internet.

Figure 4:	Run Background Check
	Welcome to the Protect My Ministry background check service. If this is your first time using this feature complete steps 1 and 2. If not, continue with the background check.
	Step 1 - Registration: Complete this step first to register with the Servant Keeper background check system. (Opens in Web Browser) Complete this step first to register with the Servant Keeper background check system.
	Enter Information Once you receive the organization information complete this step to enter and save it.
	v2.0.0.115 Call 570-748-2800 for Support.

Step 7 : The Welcome window will be displayed. (See Figure 5) Click "Yes, I need to register".



Step 8 : A Web browser will open you to the Background Check Account Registration page. (See Figure 6) Fill in all of the required information and click [Next] to continue.

Figure 6:	SERVANŤ KEEPER BACKGROUND CHECKS	Background Check Account Registration
	Please complete the form below to sign up	
	Enter Client Code (if applicable):	SPRI
	*Organization Name:	
	*Street Address:	
	*City:	
	*State:	
	*Zip:	
	*Contact Name:	
	*Contact Email:	
	*Telephone:	
	Fax:	
	How long has the organization been established?	
	*Type of Organization:	(e.g. Church, School, Flower Shop)
	*Purpose for Background Checks:	Choose one
	*Tax ID Number:	
	*Billing Contact:	
	*Billing Contact Email:	
	User Setup:	
	*Username: (6-10 Characters)	
	"Password: (6-10 Characters) Click "Next" to enter Dilling Information.	
		Next

Step 9: On the next screen, complete the payment information requested and click [Next]. (See Figure 7) There is a one-time fee of \$39 to register with Protect My Ministry.

Eiguro 7:	General Information Application:
Figure 7:	Billing Information:
	▼ You are agreeing to pay a \$39 enrollment fee.
	Type of Credit Card: VISA C MC C DISCOVER
	Name on Credit Card:
	Credit Card Number:
	Exp. Date: (format: MMYYY)
	Sec. Code:
	Monthly Invoices will be paid Credit Card C Check
	* Any payments received 15 days past the due date are subject to a 3% service fee.
	AGREENENT dated as of March 16, 2012 to March 15, 2013, Kelly Toner (hereinafter called "Client") and Frostet My Ministry, Inc. (hereinafter called "NM"). 1. Client agrees that all background reports will be submitted and received subject to the conditions of this Agreement. Froir o requesting service from Froteot My Ministry, the Client shall have in its possession a properly completed and signed "Authorization for Release of
	🔽 I have read and agree to the terms and conditions described above and below in the Service Agreement and Privacy Policy.
	I certify that I will not resell the report or any part of the report to any third party.
	Het

Step 10 : Within 24 – 48 hours of completing the form for Servant Keeper Background Check services you will receive an email that will include the Organization ID and Password. (See Figure 8) Once you complete the steps above and receive the email, please proceed to the next step.

Figure 8:

Hi , Your PMM Plug-n-Play account has been setup! Below is your organization id and pw for you to activate your account with Protect My Ministry.

Org ID: Organization Password:

For account questions contact Brittany Gaudeland ext 234, https://www.inistry.com

The Standard pricing is \$10 for the BASIC package and \$19.95 for the PLUS package, please access the link provided here for more details on what package PMM recommends for your state and jurisdiction

http://priority.devshed.us/Default.aspx?VendorID=1

We look forward to serving you in this area of your ministry. Thank you for choosing Protect My Ministry.

- **Step 11 :** After receiving the email from Protect My Ministry with your registration information, you will need to enter the settings into Servant Keeper. To begin, open and log in to the Membership Manager.
- Step 12 : Click the [Find] button on the icon bar. (See Figure 1) The Find Record window will appear.
- **Step 13 :** In the "Search for Item" line, type in the name of the individual you plan to do the background check on. (See Figure 2) Click the **[Find]** button and you will see a list of individuals who match your search.
- Step 14 : Double click on an individual to open into their Individual Profile. (See Figure 3)
- Step 15: Click once on the [Background Check] button. (See Figure 3)
- **Step 16 :** The Run Background Check window will appear. (See Figure 9) Click on the **[Enter Information]** button.



NOTE: If you are unable to see the **[Enter Information]** button for any reason, it may mean that the DPI setting selected on your computer is too high for the window to display correctly. Try changing your DPI settings back to the "100%" option for the entire window to display. (DPI settings are found in your computer's Control Panel. If you are unsure of how to change these settings, please contact your Network Administrator.)

Step 17 : The Servant Keeper Background Check Settings window will be displayed. (See Figure 10) Enter in your Servant Keeper Customer ID number and an email address. (The email address entered on this window will receive notifications when a submitted background check has been completed.) You will also need to enter the Organization ID and Password found in the email you received from Protect My Ministry after registering (refer to Step 10 above). Click [Save].



NOTE: Organization ID's and Passwords *are* case-sensitive.

Step 18 : A Web browser will open with a message that your email address has been updated. (See Figure 11)



You are now ready to complete background checks!

Please proceed to the "Submitting Background Checks" section on the next page as a guide for submitting your first background check.

Submitting Background Checks

- Step 1: Open and log in to the Membership Manager.
- **Step 2**: Click the **[Find]** button on the icon bar. (See Figure 1) The Find Record window will appear.



Step 3: In the "Search for Item" line, type in the name of the individual you plan to do the background check on. (See Figure 2) Click the **[Find]** button and you will see a list of individuals who match your search.

Figure 2.	Servant Keeper 7 - Main List		
	File Tools Individual Family Group Re	Find Record	
		Search On Field: Name/Env #	
	Aug Delete Find	Contans Colose Map Address Picture Map Address Picture	
	Family Group Total: 116 Select Group All Family Records	E 116 Total Individuals: 239 Vew Individual List View	
	Find Household	Save As Select Fields Print List	
	Directory Name	Last Name / First Name Home Phone Env # A Ionship Member Status	
	Adams, William & Audrey	Smith Nancy (555) 555-5555 W011 of Household Visitor	
	Arnold, Jimmy & Nancy	Smith Laurel (717) 748-3094 79	
	Bitner, Bob & Joyce	Smith Ionathan (702) 398-1334 76	
	Bitner, Jack & Camille	Smith Marvane (70) 398-134 77	
	Bitner, John & Brandi	Smith Randall (707) 308-134 78	
	Bitner, Johon	Smith Catholic (00) 336 145	
	Bidckwell, Nick & Patty	Smith John 336 146	
	Boat James	Smith Bab 147	
	Bonia, James		
	Bovine, Bob & ElSie	There are 15 record (s) found	
	Current Data Source - Cill Icercl Public Document	th Servent Kenner Database Servent Kenner Data ek Zith Longed On Ari Sarah	
	Current Data Source - C: Users Public Document	is per varit neeper varit neeper varit veeper veeper varit veeper varit veeper varit veeper veepe	J

Step 4: Double click on an individual to open their Individual Profile. (See Figure 3)

Step 5: Click once on the [Background Check] button. (See Figure 3)



Step 6 : The Run Background Check window will appear. (See Figure 4) Enter the requested information and click **[Start Background Check]**.

Figure 4:	Run Background Check	a suba	
	PROTECT MY MINISTRY Because Greece For Har Place or Fine.	Welcome to the Protect My Ministry ba If this is your first time using this featur If not, continue with the background ch	ackground check service. e complete steps 1 and 2. eck.
	Background Check for:		Show Settings
	Jonathan Smith 315 S. Main Street Jersey Shore, PA 17740-1723 Birth Date: 05/14/1952	Drivers License # State Social Security #	Start Background Check
	View Pricing and Options		Re-submit information 💿
	v2.0.0.115	Call 570-748-2800 for Support.	Close

NOTE: Drivers License and SSN numbers are NOT required on this screen, but may be on a later screen depending on the type of background check you are ordering.

Step 7 : A "Start Background Check" confirmation window will appear. (See Figure 5) Click **[Yes]** to continue with the background check process.



Step 8: You will now see the Confirm Details window. (See Figure 6) Some fields may be pre-filled with the information passed from Servant Keeper. Fill in all of the required fields and any additional information that you may have, then click the **[Submit]** button.

Eimanne Or	Confirm Details		
Figure 6:	Please do NOT use any pun	tuation in any fields other tha	an the date and email fields.
	Date:	6/3/2014	
	First Name:	Jonathan * (Do n	not include punctuation. Ex: , ' -) Original value:
	Middle Name:	(Do not	t include punctuation. Ex: , ' -)
	Last Name:	Smith * (Do n	not include punctuation. Ex: , ' -) Original value:
	Other Names Used:		
	Social Security:	* (ente	er 111111111 if SSN is unknown)
	D.O.B.:	5/14/1952 * Orig	ginal value: 190000DD
	Sex:	Male	il value:
	Ethnicity:	Race/Ethnicity Unknow -	
	Phone:	(707)398-1334	
	Drivers License:	(Do r	not include punctuation. Ex: , ' -)
	DL State:	Select a State require	red if Drivers License is filled in)
	Email:	(requin	ed for Child Safety Training)
	Addr. From:	*	
	Street:		*
	City:		
	State:	Pennsylvania	nal value:
	Zip Code:	*	
	Submit		

NOTE: Do not use any punctuation in any fields other than the date and email fields. Extra punctuation in any other fields (such as the Drivers License field) will not allow you to submit the background check. If you click on the **[Submit]** button and nothing happens (i.e. you do not leave the Confirm Details screen), it may be because of punctuation on the form. Try removing any punctuation and re-submitting the form.

Step 9: You will see an Entry Saved window. (See Figure 7) Click the **[OK]** button to proceed.

Figure 7:	Entry Saved	
	Click OK to order background check.	ок

Step 10 : An Order Background Check window will appear. (See Figure 8) Select the type(s) of background check(s) to be done on the individual from the list of available background check packages. You may also select the "A La Carte" option to check specific items to be researched. Click **[Next]** to continue.

Figure 8:	Order Background C	Theck
	Name:	Hand Hint
	Position:	Volunteer
	Requirements:	False, Application not required, Authorization, Background Check
	Billing Ref:	Reference one
	Package:	A La Carte A La Carte
	A la Carte	National Criminal Database Search Criminal Search (County or Statewide) MVR Driving History Search SSN Verification & Address History Credit History Education Verification Employment Verification National Sex Offender Registry Child Abuse Registry Search
	Search AKA (Maiden Name):	(Additional Charges ApplyApplies to all Court Searches)
	Next >	

NOTE: The "Billing Ref:" field can be used to subtotal your background checks to different departments. You must call Protect My Ministry to enable this feature.

Step 11 : At this point, the program will display a summary screen of all that has been requested. A variety of screens may appear depending on what type(s) of background check(s) you selected in the previous step.

- If you choose the "A la Carte" option, continue to Step 12.
- If you choose the "Basic" package, continue to **Step 14**.
- If you choose the "Plus" package, continue to **Step 16.**

Step 12 : If you choose the "A la Carte" package, you will see the Summary window. (See Figure 9) Click the [Submit Background Check] button to complete the process.

Figure 9:	Sur	nmar	Ŷ	
,	For the	followi	ing Applicants:	
	First	Last	Date of Birth	Social Security Number
	John	-	08/15/1974	100000000000000000000000000000000000000
r	You are	e about	to order the fo	llowing services:
			Package:	A La Carte
			Services:	
	_	1-1		
	Pre	evious	Submit	For Background Check

Step 13 : A Background Checks Have Been Ordered window will appear, you may close this window. (See Figure 10) Continue to Page 13 below for more information.

Figure 10:	Background Checks Have Been Ordered	
	You may now close this window.	

Step 14 : If you chose the "Basic" package in Step 10, you will see the Summary window. (See Figure 11) Click the [Submit Background Check] button to complete the process.

Figure 11:	Sum	nary		
_	For the fo	llowing A	pplicants:	
	First	Last	Date of Birth	Social Security Number
	John	-	08/15/1974	
	You are a	bout to or	rder the following serv Package: Basic Services: Nati • SSN • Nati	rices: onal Criminal Database Search I Verification & Address History onal Sex Offender Registry Search
	Previ	ous	Submit For Backgrou	und Check

- **Step 15 :** A Background Checks Have Been Ordered window will appear, you may close this window. (See Figure 10) Continue to **Page 13** below for more information.
- **Step 16 :** If you chose the "**Plus**" package in Step 10, you will see the Criminal Search window. (See Figure 13) Choose either "Statewide" or "County", then select the state where you would like to do the search.

Figure 13:	Criminal Search
	Choose a search type: Statewide County
	State: PA - Use this State
	Previous



Step 18 : The Criminal Search window will appear. (See Figure 14) Click [Next] to continue.

Figure 14:	Crimina	l Sea	rch	
	Search Type	State	County	
	Statewide	ΡΛ		<u>Delete</u>
	Add Another	Search]	
	Previous		Next	

Step 19 : You will see the Summary window. (See Figure 15) Click the [Submit Background Check] button to complete the process.

Figure 15:	Sum	mary	Applicantes	
	For the fo	Last	Date of Birth	Social Security Number
	John	Hinton	08/15/1974	1221102
	You are a	about to o	Package: Plus Services: Nati Crim SSN Nati	ices: onal Criminal Database Search ninal Search (1): Statewide for PA Verification & Address History onal Sex Offender Registry Search
	Prev	ious	Submit For Backgrou	nd Check

Step 20 :

A Background Checks Have Been Ordered window will appear, you may close this window. (See Figure 10) Continue to **Page 13** below for more information.

NOTE: Within 24-48 hours you will receive an email confirming that the background check has been completed. At that time, please follow the instructions on the next page to view your completed background check.

Viewing your Completed Background Check

- Step 1: Open and log in to the Membership Manager.
- **Step 2**: Click the **[Find]** button on the icon bar. (See Figure 1) The Find Record window will appear.



Step 3: In the "Search for Item" line, type in the name of the individual you plan to do the background check on. (See Figure 2) Click the **[Find]** button and you will see a list of individuals who match your search.

Figure 2.	Servant Keeper 7 - Main List	
	File Tools Individual Family Group Re	Ind Record
	💑 . 🗶 👂 .	Search On Field: Name/Env # Search For Item: Smith
	Aug Delete Fillio	Contains Cose Map Address Picture Indude Disabled Records
	Family Group Total: 116 Select Group All Family Records	Image: Information of the second s
	Find Household	Save As Select Fields Print List
	Directory Name	Tast Name / First Name Home Phone Fox # Ionship Member Status
	Adams, William & Audrey	Smith Nancy (555) 555-5555 W011 of Household Visitor
	Arnold, Jimmy & Nancy	Smith Jaurel (717) 748-3094 79
	Bitner, Bob & Joyce	Smith Innathan (707) 398-1334 76
	Bitner, Jack & Camille	Smith Maryane (707) 308-1334 77
	Bitner, John & Brandi	Smith Randall (707) 398-1334 78
	Bitner, Johon	Smith Cathou 336 145
	Bidckwell, Nick & Patty	Smith John 336 146
	Bond Jamos	Smith Boh 147
	Boria, James Bovine, Bob & Elsie	There are 15 record (a) found
	Current Data Source - C:\Users\Public\Document	s Servant Keeper Database ServantKeeperData.sk7db Logged On As: Sarah 🕏 Go to Version: 7.0.23 🔅

Step 4: Double click on an individual to open their Individual Profile. (See Figure 3)

Step 5: Click once on the [Background Check] button. (See Figure 3)

F:		Profile of Jonathan Smith
Figure 3:	Profile	
	🤣 🔞 🗄 Save	
	Save & Cancel 🗶 Delete	Main Find Email Quick Call View Web Schedule Copy Background
	Close & Close Save & Close	Lut ° Print ° Map ° Page Appointment Address ° Check Navigation Communicate Options
		Profile Alt Addy/Phone Attributes (totes Important Events More Info (Overview Attachment Relative Youth Minster) ((story
	Jonathan Smith	Title Mr. · Gender Male · Home Phone (70/7) 398-1334 [Unlisted
	Head of Heusehold	First Name Jonathan Middle Name R. Cell Phone Cull Store
	head of household	Last Name Smith Maiden Name Work Phone (707) 398-1000 Utilisted Wx
	1000	Preferred Name 30n Suffix E-Mail LovinServantKor@aol.com
	6 4	Address 315 S. Main Street Salutation Jon Occupation Real Estate *
	X	Employer
		City Jessey Shore - State PA - School Grade -
	1900	Adults Sunday School Adults
	Control Transform & Management	Workson Table - 2029/1993 C - Werker Val. Coulding Value - Val
	Smith, Jonathan & Maryanne	Babter V Ver 0700000 (10 Confirmed Ver 1/1 The Petra Feld 2
		How Joned Transferred - Date Joned 07/13/1985 T Extra Field 3 -
	Sopen Family	Member Status Active Member - Vinclude in Dectory VisiLetter Sent 05/11/2011 @ Date Dec / / @
	St. chanter	Env # 76 Assign # 🕑 Include in Family Statement Extra Date 7 // 🔟 Extra Date // 🔟
	List Navigation	V Enabled Profile Tockde a Cross Reference In Directory V Biground CK V Youth Group Checkbox 3
	© © © © 1/3	
	Created Date: 04/15/1996 By: CHURCH	
	Last Edited Date: 06/04/2013 By: Sarah	

Step 6 : You will see the Run Background Check window. (See Figure 4) Click the **[View Background Check Results]** button to obtain the report from the background check that you submitted. (See Figure 5)

Figure 4:	Run Background Check		x
	PROTECT MY MINISTRY BOIRDAD GREES FOR FOR FOR	Welcome to the Protect My Ministry ba If this is your first time using this feature If not, continue with the background che	ckground check service. e complete steps 1 and 2. eck.
	Background Check for:		Show Settings
	Jonathan Smith 315 S. Main Street Jersey Shore, PA 17740-1723 Birth Date: 05/14/1952	Drivers License # State	View Background Check Results
	View Pricing and Options	Reset Information	<u>Re-submit information</u>
	v2.0.0.115	Call 570-748-2800 for Support.	Close

Figure 5:	CONFIDENTIAL	Servant PC Demo Account					
Sample back-	Requested:02/18/09						
ground check.	Background Verification Report	Completed:02/19/09 Requested By:					
	Subject.	DOB:					
	SSN:	Position: Volunteer					
	Social Trace						
	test						
	Nat'l Criminal Database Search						
	test						
	End Of Report						
		12					

How much will the background check cost?

Cost depends on your state and county (additional mandatory fees may apply). The difference depends on the reliability of the information for that state and county in the national database. Many states and counties do not report all of their criminal records to the national database; in those states and counties, it may be necessary to run both a national search and a local county or statewide criminal search to get accurate data. Based on the reliability of the data, Protect My Ministry has come up with a minimum recommendation depending on what state and county you and the prospective volunteer are located in. For some locations where the states do provide reliable data to the national database, the minimum recommendation is a BASIC Package. For other locations, the minimum recommendation is a PLUS (county or statewide) Package. Cost information is available by email (information@protectmyministry.com) or by calling (800) 319-5581.

Protect My Ministry offers cost-friendly packages to meet minimum recommendations through an intuitive Online Consultation System for volunteer background checks. Recommendations are based on the quality of data available in each state and industry best practices. At the very minimum the background check should cover Social Security Number Verification, National Criminal Search and Sexual Predator/Offender Registries Search.

How will the information be kept that is obtained from the background screening?

How to manage the data will be up to each local church. It is our strong recommendation that the information received in the background screening be held confidential by the church or ministry and not be released to anyone other than those necessary to review the information, such as the leaders and church pastors.

Will individuals receive a copy of the background check run on them?

This will be up to the local church that conducts the background check. If adverse information does show up that would disqualify an individual from volunteering, we strongly recommend that you share that information with the individual and give him/her an opportunity to contest the accuracy of that information. Protect My Ministry provides an opportunity for churches to request further review of records when someone contests the accuracy of the results.

Is the background check for volunteers similar to those done for paid employees, such as teachers and other care givers?

Yes. In fact, all staff and employees of the church or ministry, including its Senior Pastor, must pass an even more rigorous criminal background check, including employment and education verifications, driving history and credit history searches.