



PROTECT

M Y M I N I S T R Y

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## About Us

Ministry Mobilizer is Protect My Ministry’s paperless risk management system.

It is best to think of Ministry Mobilizer as a secure filing cabinet for the background checks that you process and the forms you collect. You can use Ministry Mobilizer as a part of your volunteer recruitment process or as an electronic application system, or both, it is up to you.

It is recommended that if you have access to background reports through Ministry Mobilizer, DO NOT save a copy of the background report. It is also recommended that you DO NOT print out the background checks onto paper unless you have a locked filing cabinet to store them. It is recommended that you shred documents that contain any sensitive identity information when the time comes to dispose of the documents. These measures will help reduce the risk of identity theft and information falling into the wrong hands. **Protect My Ministry recommends consulting your legal counsel in order to ensure your compliance with all state and federal laws.**

Ministry Mobilizer is secure. Both the login page and online application are protected by Digicert Authority with 2048-bit encryption. The connection is encrypted using TLS\_ECDHE\_RSA\_WITH\_AES\_256\_GCM\_SHA384, with ECDH for message authentication and RSA 2048 as the key exchange mechanism.

Ministry Mobilizer offers an online application and consent form with bundle 2 and higher.

Bundle #s will be displayed, throughout this guide, to indicate availability. <sup>0 1 2 3 4</sup> To view our side by side comparison of all available bundles, please see our reference document at the end of this user guide.

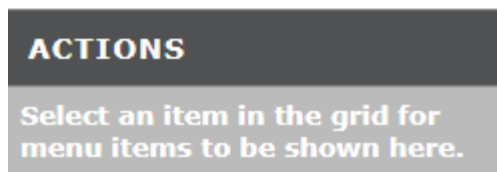
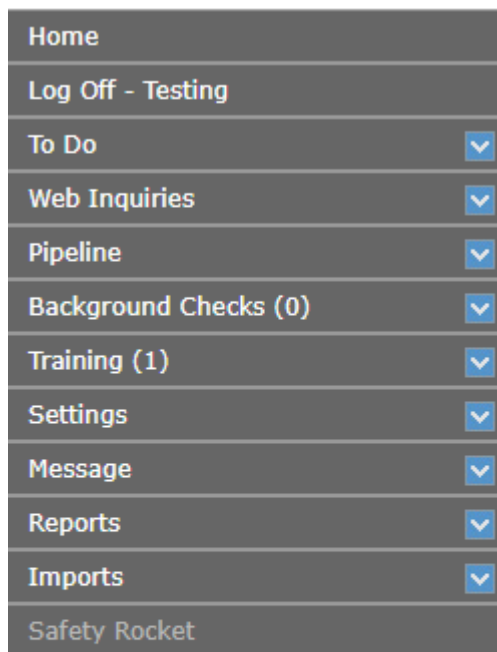
## Getting Started

### Login

You will be sent an email with your username and a link to set your password. Your login credentials are case sensitive. If you forget your password at any time, please use the 'Forgot Password' option to reset it. If you forget your username, please contact your account administrator for your organization.

Go to: <https://www.ministrymobilizer.com/login/Account/Login>

### Menu and Home Page



The Menu Options shown will be enabled based on bundle type. Bundle #s will be displayed, throughout this guide, to indicate availability. <sup>0 1 2 3 4</sup>

To view our side by side comparison of all available bundles, please see our reference document at the end of this user guide.

The Home Page has all announcements and information regarding system updates, office hours, compliance updates, training manuals, links and resources pertaining to background checks and notes for your account.

**\*\*Note- Bundles 2 and Higher can do multiple functions from the Pipeline Create New menu (send online forms, order reports, order training and add applicants to their account without ordering). See Pipeline section for more information.**

## Background Checks<sup>0 1 2 3 4</sup>

*Main Menu>Background Checks>New Order for new applicants (all bundles) OR Main Menu>Pipeline>Create New>Background Checks (bundles 2 and higher)*

- Our Background Check page will indicate fields required to order a background check with an asterisk. The accuracy of your final report depends on the accuracy of the information submitted.
- If you need a court search (Plus package), you will need to know the state and/or county to search. **\*\*each county and/or state searched has a search fee of up to \$10.50 each PLUS any mandatory fees for that location\*\*** The fees displayed only represent the mandatory court fees and not the search fees themselves.
- If you need help with ordering, we can make recommendations for you, please call Customer Service or visit our map <http://criminal-background-checks.info/> which also has all of the latest fees and pricing.
- If your organization uses billing references, please select one for your order (we will subtotal your invoices by these billing references for your convenience)
- If you select a search that has a specific requirement (such as a consent form is required with a GA statewide search) a pop-up window will remind you to supply the information.

\*\* Credit Checks require complete mailing address

\*\*MVRs require driver's license and state.

## Background Check

First Name*	Middle Name	Last Name*
<input type="text" value="First Name"/>	<input type="text" value="Middle Name"/>	<input type="text" value="Last Name"/>
<input type="checkbox"/> No legal middle name		

Aliases

No aliases have been created yet. Click the Add button to add an alias.

SSN*	Date of Birth*	Email Address*	Telephone
<input type="text" value="SSN"/>	<input type="text" value="mm/dd/yyyy"/> <input type="button" value="📅"/>	<input type="text" value="Email Address"/>	<input type="text" value="Telephone"/>
Address	City	State*	Postal Code
<input type="text" value="Address"/>	<input type="text" value="City"/>	<input type="text" value="Select"/> ▼	<input type="text" value="Postal Code"/>
Driver's License	DL State	Gender	Ethnicity
<input type="text" value="Driver's License"/>	<input type="text" value="Select"/> ▼	<input type="text" value="Select"/> ▼	<input type="text" value="Select"/> ▼

Once you click 'Continue', you will be taken to the menu to order your package or group of services.

A la carte services can be ordered by selecting a la carte from the package menu and then selecting the individual services.

To also search by the AKA name, check the box but note additional charges apply.

To add training to your order (bundles 1 and higher), select a type of training.

Order Background Check for Johnathan Consumer [View Applicant List](#)

First Name	Last Name	Date of Birth	Social Security Number
Johnathan	Consumer	10/10/1990	***.***.9999

Billing Reference

Package

Search AKA (Maiden Name)

Order Training for Johnathan Consumer

- Employee (Extended Series-Approved by the Texas Department of State Health Services)
- Spanish (Extended Series-Approved by the Texas Department of State Health Services)
- Volunteer

[Cancel](#)

[Next](#)

If you are ordering a Plus package or any package with a criminal search, you will be prompted to add the county or statewide search.

Once you click the “Add” button, you can select the type of search. The system will recommend a state or county based on the address submitted for the applicant. If you will be ordering county searches, provide both state and zip code in the applicant address so the system can recommend the county.

You can add additional state or county searches to your order and you will be charged the additional a la carte search fees plus any applicable mandatory court fees.

### Criminal Search - County or Statewide Add ▾


No searches have been created yet. Click the Add button to add a search.

**ATTENTION:** Please note that additional searches have a la carte service fees, up to \$10.50 for each jurisdiction, regardless of whether or not there are any additional mandatory fees.

[Go Back](#) [Next](#)

Example of search once the Add button was clicked and then Statewide was selected.

### Criminal Search - County or Statewide Add ▾



State*	Additional Mandatory Fees
<input type="text" value="AK"/>	

**ATTENTION:** Please note that additional searches have a la carte service fees, up to \$10.50 for each jurisdiction, regardless of whether or not there are any additional mandatory fees.

[Go Back](#) [Next](#)

Example of adding an additional statewide search that has additional mandatory fees that I agreed to pay when prompted. If, after viewing the cost, you change your mind, you can remove the search and add a new jurisdiction.

### Criminal Search - County or Statewide Add ▾

State*	Additional Mandatory Fees
<input type="text" value="AK"/>	
State*	Additional Mandatory Fees
<input type="text" value="FL"/>	<b>+\$25</b> 

**ATTENTION:** Please note that additional searches have a la carte service fees, up to \$10.50 for each jurisdiction, regardless of whether or not there are any additional mandatory fees.

[Go Back](#) [Next](#)



## Summary Page

Review the information you are submitting, certify the order and click Order

### Summary

For the following Applicants:

First Name	Last Name	Date of Birth	Social Security Number
Johnathan	Consumer	10/10/1990	***-**-9999

You are about to order the following:

Package: PLUS

Services:

- Criminal Search (County or Statewide)
  - AK
  - FL
- National Combo Search (SSN, Nat'l. Crim Database Search, Nat'l. Sex Offender Registry)

Training: Volunteer

#### Fair Credit Reporting Act – Client Certification

By requesting a background check report from Protect My Ministry you certify the following:

- You have provided the job applicant/volunteer with a clear and conspicuous disclosure advising them that a background check report may be obtained for employment/volunteer purposes and have received their authorization to obtain the report;
- You will comply with any adverse action requirements as described in the Fair Credit Reporting Act, if applicable (15 U.S.C. §§ 1681b(3) and 1681m(a)); and
- You will not use information contained in the background check report in violation of any applicable Federal or State equal employment opportunity law or regulation.

[Click here to certify that you have secured authorization and will adhere to these legal requirements](#)

If you ordered a Statewide, County, and/or MVR search, additional fees may apply. [Please review the current mandatory court fee lists.](#)

[Go Back](#)

[Order](#)

## Success Page

The status of your order will be shown once submitted. Click Ok to return back to your applicant list.

## Success!

Your order has been submitted. Please allow up to 3 business days for your report to complete.

### Background Check Order Status

First Name	Last Name	Date of Birth	Social Security Number	Status
Julie	Carter	10/10/1990	***-**-1111	Pending

OK

\*If training was ordered with the background check, you will be notified if the email has been sent or if the applicant already had a training order in progress which can be found in your Training Pending menu and can be resent from there if the applicant did not receive it.

## Viewing Background Reports <sup>01234</sup>

There are a few ways to find and open a completed report.

1. The first is straight from the Background Checks section in the Main Menu. Select Complete. The first column on the grid is Report, when the screening is complete, **Complete** will be displayed. Simply click on **Complete** to view the background report. Alerts for background checks and risk assessment status (optional) are also shown on this page.

MINISTRY MOBILIZER

**Background Checks: Complete**

Last Name: --Enter a last name to filter by-- Reference: --Enter a reference to filter by-- Department: All

	Report	Training	Auth	Status	First	Last	Al
<input type="checkbox"/>	Complete	P	✓	COMPLETE	Johnathan	Consumer	Al

Page size: 100

2. If the report is not yet complete, it will appear in your Pending menu. Do not place the order again, if the status is pending -even if you think the report is taking longer than normal to complete. Your account will be charged for duplicate searches. **Most searches complete in 1-3 days but you may call our support desk to check the status after 72 hrs.**

**MINISTRY MOBILIZER**

**Background Checks: Pending**

Last Name:  Department:

	Report	Auth	Requested	First	Last
<input type="checkbox"/>	Pending	✓	06/30/2021	Jane	Doe
<input type="checkbox"/>	Pending	✓	06/28/2021	Johnathan	Consumer

Page size: 100

- The final way to view the background report is straight from the Pipeline (\*The Pipeline is a service only offered to Bundle 2-4 accounts). The first column on the grid is Report, when the screening is complete, **Complete** will be displayed. Simply click on **Completed** to view the background report. A **Pending** status indicates we have the order but have not yet completed it.

**MINISTRY MOBILIZER**

**Applicants: All**

Last Name:  Department:

	Report	Training	Auth	Applicant Added	First	Last
<input type="checkbox"/>	Pending		✓	06/30/2021	Jane	Doe
<input type="checkbox"/>			✗	06/30/2021	John	Doe
<input type="checkbox"/>		Pending	✗	06/30/2021	Sarah	Consumer
<input type="checkbox"/>	Complete	Pending	✓	06/28/2021	Johnathan	Consumer

Page size: 100

It is recommended that you Archive the report once it has been viewed. Archiving the report from the Background Checks complete section will not archive the applicant that is in the Pipeline. It will only archive (remove) the report from the 'Complete' menu in Background Checks.

## Child Safety Training<sup>1 2 3 4</sup>

*Main Menu>Training>New Order for New Applicants (bundles 1 and higher) or Pipeline > Create New (bundles 2 and higher) or Training can be added on to a background check at the time of the order.*

This is an online video course and quiz. There are three versions: Employee (full training-approx one hour), Volunteer (condensed version-35 min) and Spanish (same content as the Employee version-approx one hour). You must have a valid email address for your applicants.

### Order Training

Our Child Safety Training order page will indicate fields required to order a background check with an asterisk. All emails are sent from [message@protectingourkids.com](mailto:message@protectingourkids.com) but you can customize the email message sent to your applicant in your Training Email Settings. *Main Menu>Settings>Training Email Settings*


### Add Applicant Details

#### Child Safety Training

First Name\*

Last Name\*

Date of Birth

Email Address\*

### Select Training Type

Order Training for Sarah Consumer

First Name	Last Name	Email Address
Sarah	Consumer	email@email.com

Employee (Extended Series-Approved by the Texas Department of State Health Services)  
 Spanish (Extended Series-Approved by the Texas Department of State Health Services)  
 Volunteer

Cancel

Order

### Success Page

Order Status

First Name	Last Name	Email Address	Status
Sarah	Consumer	email@email.com	Sent

OK

Once you click 'OK' you will be taken back to order your next training or you can navigate to a different menu.

### View Training Results

The results of completed trainings can be found in your Training Complete menu. Clicking on "Complete" will allow you to view/print the certificate. If an applicant says they completed the training but their status has not updated, they did not save their score. Applicants must click "View Certificate" when satisfied with their score for you to view the save their score and view the full certificate of completion. If they forget, they can go back to the link, click it again and from there they can save their score.

Pending trainings will be found in the Pending menu.

## Online Application <sup>234</sup>

Sending the Online Application to a new applicant

*Menu>Pipeline>Create New>Send Consent form to a new Applicant*

**Send Consent Form**

Position\*

First Name\*  Middle Name  Last Name\*

No legal middle name

Email Address\*

Resending the Online Application to an existing applicant with no changes needed

*Menu>Pipeline>All>Filter by applicant last name>Select applicant and use Actions Menu>Send Consent Form to an existing applicant who has been screened before (this option does not allow you to change the position the applicant is assigned to.*

The screenshot displays the Ministry Mobilizer web application interface. On the left is a navigation sidebar with a menu of options. The 'ACTIONS' section is expanded, showing 'Send Consent Form...' as the selected option. The main content area shows the 'Applicants: All' view. At the top, there are search filters for 'Last Name' and 'Department'. Below this is a table of applicants with columns for Report, Training, Auth, Applicant Added, First, and Last. The first row is selected, and the 'Auth' column shows a green checkmark. The second and third rows show red X marks in the 'Auth' column. The table includes a 'Page size: 100' dropdown at the bottom.

Report	Training	Auth	Applicant Added	First	Last
<input checked="" type="checkbox"/> Pending		✓	06/30/2021	Jane	Doe
<input type="checkbox"/>		✗	06/30/2021	John	Doe
<input type="checkbox"/>	Pending	✗	06/30/2021	Sarah	Consumer
<input type="checkbox"/> Complete	Pending	✓	06/28/2021	Johnathan	Consumer

## Sending Online Application to an Applicant who needs a change of email or position

*If you need to edit the applicant's email or change their position, Edit/View the applicant profile-make your changes and click Send Consent form on that page.*

The screenshot shows a form for editing an applicant's profile. The fields are as follows:

- DL State: Select a State (dropdown menu)
- Email: email@email.com (text input)
- Addr. From: 10/01/1990 (date input with calendar icon)
- Street: TEST ST (text input)
- City: TAMPA (text input)
- State: Florida (dropdown menu)
- Zip Code: 33618 (text input)

At the bottom of the form, there are two buttons: "Save" and "Send Online Consent form Link to Applicant".

Bundles 2 and higher have access to an online application. You can find your public link in your "My Account Tab" or use our Send Consent Form option to email a unique link to your applicant. You can customize the email that is sent in your Consent Form Email Settings.

You can also customize the look of your online form by visiting your Customization menu of your Settings.

## Pipeline <sup>2 3 4</sup>

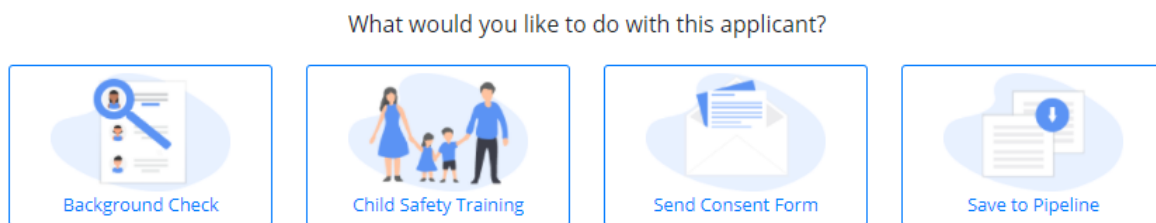
The purpose of the pipeline is to be able to view and manage your applicants.

### Create New

This is the starting point for adding a new applicant into your account. Each time you perform an action for an applicant here, you are creating a new profile for an applicant. From this menu you have the option to:

- Order background checks for new applicants (see Background Checks for more info)
- Order child safety training for new applicants (see Child Safety Training for more details)
- Send consent forms to new applicants (see Online Application for more details)
- Save a new applicant to the Pipeline for later (this only adds an applicant to your account- nothing else)

Each option you select will direct you to the proper page to collect only the minimal information needed to process your request.



Depending on the action you selected, the applicant will then appear in your pipeline once the form is complete and any status for that applicant will appear.



## Sample Pipeline View:

The screenshot shows the Ministry Mobilizer interface. On the left is a navigation menu with options like Home, Log Off, To Do, Web Inquiries, Pipeline (4), and Create New. The main area displays 'Applicants: All' with a search bar and a filter button. Below is a table with the following data:

Report	Training	Auth	Applicant Added	First	Last	Phone	Department	Position	Email	Stage	Active
<input type="checkbox"/> Pending		✓	06/30/2021	Jane	Doe		None	Standard	email@email.com	none	Y
<input type="checkbox"/>		✗	06/30/2021	John	Doe		None	Standard	email@email.com	New	Y
<input type="checkbox"/>	Pending	✗	06/30/2021	Sarah	Consumer		None	Standard	email@email.com	New	Y
<input type="checkbox"/> Complete	Pending	✓	06/28/2021	Johnathan	Consumer		None	Standard	email@church.com	New	Y

At the bottom right of the table, there are 'CSV' and 'XLS' export buttons and a note '4 items in 1 pages'.

**Complete** in the Report column= Report is complete and ready to view. Click on 'Complete' to view the report

**Pending** in the Report column= Report is pending

Complete in Training = Training has been passed/completed and the score and certificate can be viewed from your Training Complete menu.

Pending in the Training column = Training invitation has been sent but the applicant has not yet completed the course.

✓ in the Auth column means either the applicant has submitted their online consent form or someone in your organization has ordered a background check and certified they have a copy of the consent form.

✗ in the Auth column means the applicant has been added to the account but has not submitted the online consent form or had someone place an order for their background check and certify they have a copy of the consent form.

## View/Edit Existing Applicant

To view the profile or edit an existing applicant, select the applicant from your pipeline by checking the box to the left of their name. An Actions menu opens on your left, select View/Edit Profile. You may make changes on that page and then click "Save" at the bottom. You can also resend the consent form link from that page as well.

## Perform Action on Existing Applicant

If an applicant exists in your Pipeline (you can use the filter tools at the top of your Pipeline to search), you have multiple options to add to their profile. Find your applicant and place a checkmark next to their name.

Using the Actions menu on the left, you can:

1. View/Edit their profile as well as view their authorization<sup>2, 3, 4</sup> view their application<sup>3, 4</sup>

## Save Applicant to Pipeline

*Menu>Pipeline>Create New>Save to Pipeline*

Use this option to add an applicant to your account for future consideration. Upon Saving, no action will be taken. No orders will be processed and no emails will be sent. You can come back to the applicant later to perform necessary actions such as ordering or sending the online form.

## Perform Bulk Actions on Applicants

*Menu>Pipeline>All>Select Applicants*

You can select up to 50 applicants on a page and perform a bulk action. You can order the same package on all applicants (as long as all applicants are over 18), Order the same training for all applicants, or Send the online form to all applicants.

Once all applicant names have been selected, make your selection from the Actions menu on the left you wish to perform. Follow the remaining steps to review and confirm your order.

\*To collapse a long list of applicant names AFTER reviewing and confirming, click the “View Applicant List” button. If any needed information is missing, you will need to go back and update those profiles before proceeding.

Order Background Check for Multiple Applicants				<a href="#">View Applicant List</a>
First Name	Last Name	Date of Birth	Social Security Number	
Jane	Doe	7/7/1977	***.**-1111	
John	Doe	(missing)	(missing)	
Sarah	Consumer	(missing)	(missing)	
Johnathan	Consumer	10/10/1990	***.**-9999	

Billing Reference

Select



Package

Select



Search AKA (Maiden Name)

## Setting Up Your Account <sup>01234</sup>

Main Menu>Settings

### Customization <sup>2, 3, 4</sup>

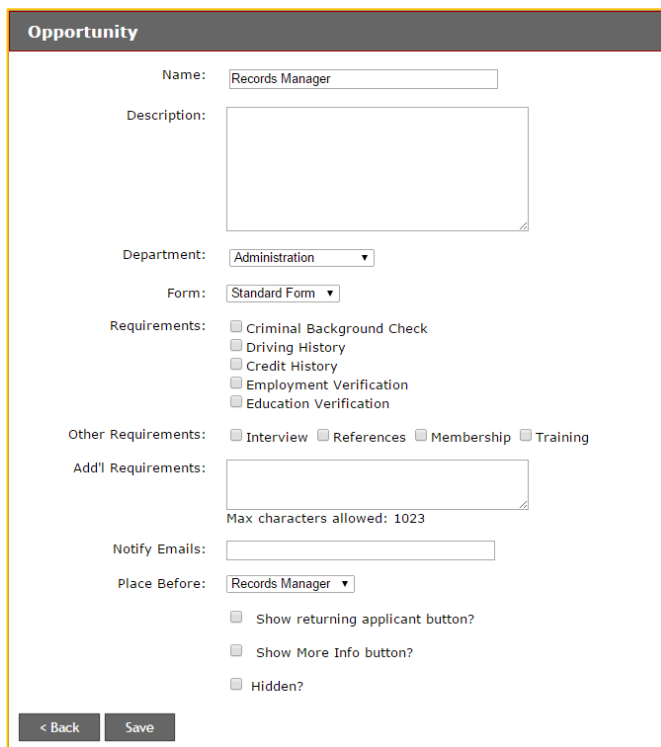
Introduction <sup>4</sup> Enter a greeting for your organization's web site. This is not required.

Home Page URL <sup>4</sup> Enter the web address for your organization's web site. This is not required.

Logo Image <sup>2,3</sup> Use customization to add a logo or banner as well as use our color picker to enhance the online form your applicants will see when sent our online link. Upload your logo to the size of 300 pixels width or upload a banner image, recommended size is 720 x 150. This works best in JPEG or PNG format.

Style Sheet <sup>2,3, 4</sup> You can also add a CSS file of your own to further customize. Click the link to download the original CSS. Make your changes, save to your computer, and click Choose File to upload your new CSS.

Click Update to save or Update and Preview to view your saved changes.



### Announcements <sup>4</sup>

Click 'New' to add an announcement to show to your visitors that apply online through your job board. Announcements will appear in the default order in which they were created. To re-order the announcements, use the Place Before drop-down menu.

### Positions <sup>4</sup>

For customers using our job board, you can create departments and positions to segment your applicants. You will need to set up your Departments first however so you can assign the Positions you create to a department.

Click 'New' to create a position or 'Edit' to modify an existing one.

Enter the name of the position.

It's a good idea to enter a summary of the

Position in the Description box. This will give your applicants a better idea if the Position is right for them.

Choose the Department that the Position is associated with.

Choose the Form that goes with the Position.

- It is recommended that you use the same names for your Departments and Forms, this will allow for easier organization.

Check the Requirements and Other Requirements for the Position; also include any Additional Requirements in the text box.

- These requirements will NOT automatically order a background check. They are simply designed as a reminder during the process of moving the applicants through the Pipeline.

Positions will appear in the default order in which they were created. To re-order the positions, use the Place Before drop-down menu.

**IMPORTANT:** Deleting is not an option at all in Ministry Mobilizer.

Editing and renaming are available options.

It is recommended that you DO NOT rename positions. The only exception to this rule is if the name of the position is changing, but the description remains the same.

- If your department decides to rename the “Infant Volunteer” to “Baby Volunteer,” and the description/position is the same, then the name can be changed.
- When a Form/Position/Department is renamed, all past applicants will have their forms/positions/departments changed also.
- If the “Infant Volunteer” is changed to “Summer Intern,” then all past applicants will change from Infant Volunteers to Summer Interns.

If you need to get rid of a Form, Position or Department, check the Hidden box on the old one and add a new one.

## Departments <sup>4</sup>

Click ‘New’ to create a new Department or ‘Edit’ to modify an existing one.

- Please check with the system administrator before you add or edit departments. It is essential that you keep department names consistent across all avenues of communication.
- Departments will appear in the default alphabetical order.
- If, at any time, you don’t want certain departments to show up on the webpage, simply check the Hidden box then Save Button.

## Forms <sup>2,3,4</sup>

*Menu>Settings>Forms>New or Edit*

The purpose of the ‘Forms’ is to allow you to create different applications for individual positions/opportunities within your organization. These different ‘forms’ can have questions specific to that position/opportunity and can be assigned to different departments so that they are reviewed by the individual responsible for that department. (Bundle 4 only)

Click ‘New’ to create a new Form or ‘Edit’ to modify your Standard form.

(See Image A below for these steps unless noted otherwise)

1. Assign a name to the form. You can name the form for the position it correlates to (teacher, minister, bus driver etc) or you can name the form for a type (volunteer, employee, administrator) which allows the form to be used for multiple positions or opportunities. Think through your organization's processes before you begin in order to save time later! I suggest mapping out your departments, positions etc and your workflow process to make the system function most efficiently for you.
2. Check the box "*Authorization Required*" if you want the applicant to be required to submit an authorization in order to submit their application. This is extremely important if you are not collecting a separate paper authorization for ordered background checks.
3. Enter the "*Authorization Text*" your users will read before signing to authorize their application. You can use our default wording or an authorization created by your legal counsel. Be sure to check the local, state and federal laws if you are unsure of the requirements. If you modify your English language, you must modify your Spanish language text. Do NOT leave Spanish blank or users who select to view the form in Spanish will NOT see consent language. To use our Spanish default language, click the "Revert to Default Text" button.
4. By checking the "*Require Driver's License*" box, applicants will be required to submit their DL info on their application. You may choose to require this if your organization plans to run an MVR search for a driver type position.
5. *Stock Questions* are questions we have prepared for different areas of the application. Only check the boxes for those types of questions you feel are necessary for the position the applicant is applying to or information you feel necessary to have on file. To see the specific custom questions for each area, you can click on the '*Preview Questions*' link before requiring them on your application. \*note-there is an option in this section called 'Ask Custom Stock Questions' <sup>34</sup>- check this box if you plan to add your own custom designed questions for your application such as Do you have any special talents that could be useful to the position you are applying to? These custom questions can be created once you hit the "Save" button for your form or at any time by going back to the Forms section of Settings. (see Image B) You will have the option to create dropdown, yes/no, short or long answer type questions as well as provide instruction only statements with no expected response. You can also require your applicants to provide their email address by checking the last box in the Stock Questions area.
6. If there are questions you will use in multiple forms, or multiple times in one form, we suggest adding Stock Questions (in the Settings Menu), to simplify the process of creating your application questions. Please note that these questions/answers will not export to a report.
7. If you are going to add your own custom questions to your form, click save and then enter those (see Image B). The custom questions will appear in the order in which they are created. To re-order the questions, use the Place Before dropdown menu. You can also make the questions required by checking the box next to "*Required?*" at the bottom. Yes/No questions will automatically be required to answer. You can also hide questions when you no longer want the

question to appear on your form (deleting is not an option). If you are creating a Dropdown type question, we suggest that the first entry be “Choose One” or something similar. The first entry you type in this field will be the default answer unless the applicant chooses one of the other choices.

- Once your Form for your position is complete, you may preview the form by clicking on the “Preview” tab at the top of the Form page. After reviewing your form and making any necessary changes, you can go to the ‘Positions’ section in Settings and choose the position that this form belongs with. Select the form from the dropdown choices (see image C)

Image A

The screenshot shows the 'Form' builder interface. At the top, there are 'Design' and 'Preview' tabs. The form is titled 'Standard Form'. It contains two authorization tests: 'English Authorization Test' and 'Spanish Authorization Test'. Each test has a text area for the user to provide their consent and a 'Revert to Default Test' button. Below the tests, there are fields for personal information like Name, Address, SSN, Date of Birth, Phone Number, Email, Gender, and Ethnicity, each with a checkbox to require it. A 'Leave a message' button is located at the bottom right.

Image B



0 Messages

ID	Name	Custom Questions	Edit
15958	Standard Form	Custom Questions	Edit
18202	Treasurer	Custom Questions	Edit
19913	Volunteer	Custom Questions	Edit




Image C

### Opportunity

Name:

Description:

Department:

Form:  

Requirements:  Criminal Background Check  
 Driving History  
 Credit History  
 Employment Verification  
 Education Verification

Other Requirements:  Interview  References  Membership  Training

Add'l Requirements:   
Max characters allowed: 1023

Notify Emails:

Place Before:

Show returning applicant button?  
 Show More Info button?  
 Hidden?

## Stages <sup>3,4</sup>

The Stages in your Pipeline can be set up in a variety of ways to help you track or group your applicants, depending on the needs of your organization.

- We recommend leaving the New and Archive stages, changing them will affect your workflow and applications.
- To create a Stage, go to the “Stages” section of Settings in your Menu.
- Click on Edit to name a stage.
- Enter the name for the stage and click Save.
- Continue this process until you have named all of the stages you plan to use.

Once all of the stages have been name, you can view them by clicking on Save or “Stages”.

Your Pipeline will also now show these stages that you have created.

### **Pre-defined stages:**

**ALL** - You can view all of your applicants –this shows you an overview of where everyone is in your process.

**UNASSIGNED** - These are candidates that have applied through your online opportunity and have not yet been assigned to a stage.

**NEW** These are candidates who have been manually entered into your Pipeline but have not completed an online authorization. They may be candidates where you have chosen to send the link to the applicant but the applicant has not yet submitted an authorization. Once they complete the authorization, their stage will change from New to Unassigned which is just a blank space in the stages column.

**ARCHIVE** -Clients use this stage differently. Some choose to archive all applicants once they have completed their onboarding process. Others use Archive for applicants no longer active with their organization. It is up to you to decide what works best for your organization. Unless you have access to Stages, you will not be able to remove someone from the archive.

**Assigning Applicants to Stages** - To move your candidate through the “Stages”, go to “Pipeline” in your Menu. You can move an applicant to a different stage by checking the box to the left of their name which will highlight the entire row and selecting “Move to Stage:” from the drop down Actions menu that will open beneath the suggestion box after you check their name. (see image below) Allowing your mouse to hover over the Move to Stage field will reveal all of your stages. Slide your mouse over to the stage you wish to move the candidate to and “click”. Your candidate’s stage will now be updated. You can also select multiple candidates at one time and then move them all to a particular stage to save time.



- Home
- Log Off - MPD
- To Do
- Web Inquiries (3)
- Pipeline (14)
- Background Checks (2)
- Training (3)
- Settings
- Message
- Reports
- Imports
- Safety Rocket

- ACTIONS**
- New...
  - Open...
  - Order Background Check...
  - Order and Email Invite For Training...
  - Create ToDo...
  - Update Active Status
  - Move to Stage:
  - Send to Archive
  - Change Opportunity:



**Applicants:All**

Last Name:  Department:

<input type="checkbox"/>	Report	Training	Auth	Applicant Added	First	Last
<input checked="" type="checkbox"/>			X	04/16/2018	First Name	Last Name
<input checked="" type="checkbox"/>				03/17/2015	Patricia	Jones
<input checked="" type="checkbox"/>				03/17/2015	Jared	Wilson
<input checked="" type="checkbox"/>				03/11/2015	Amy	White
<input type="checkbox"/>	C		✓	03/11/2015	Jan	Smith
<input type="checkbox"/>				03/11/2015	James	Wallace
<input type="checkbox"/>				03/11/2015	Christopher	Jennings
<input type="checkbox"/>				03/11/2015	Erin	Hunter
<input type="checkbox"/>				03/11/2015	Samantha	Snow
<input type="checkbox"/>				03/11/2015	Stacey	Burns
<input type="checkbox"/>				03/11/2015	Michael	Stevens
<input type="checkbox"/>				03/11/2015	David	Parks
<input type="checkbox"/>				03/11/2015	Hailey	O'Hair
<input type="checkbox"/>	C	P		03/11/2015	Connie	Rhoades

Page size: 100

[Billing References 1,2,3,4](#)

Manage your internal billing and budgeting by selecting a Billing Reference when ordering. We will subtotal your invoice by the codes you set-up.

Click 'New' to add a billing reference, add name and save.

[Additional Settings](#)

You can set a rescreen interval for your applicants here. This will put those applicants into the Background Check Rescreen Menu based on the interval you set.

You can also make Billing References required here to force a user to select a billing reference when ordering a background check.

## Training Email Settings <sup>1234</sup>

All child safety training emails are sent from our domain [message@protectingourkids.com](mailto:message@protectingourkids.com). You may customize the email body though. Please be sure to follow the instructions to keep the tags in the email body as directed.

## Consent Form Email Settings <sup>234</sup>

You can change the 'From' Email address that your emails are sent from. Please note that there is a higher bounce/spam rate when you do this unless you have made changes to your email server to allow us to send email using your domain. We cannot help you with this.

You can also customize the email body. Be sure to leave the 'tags' in your email as directed. This note in your settings will remind you.

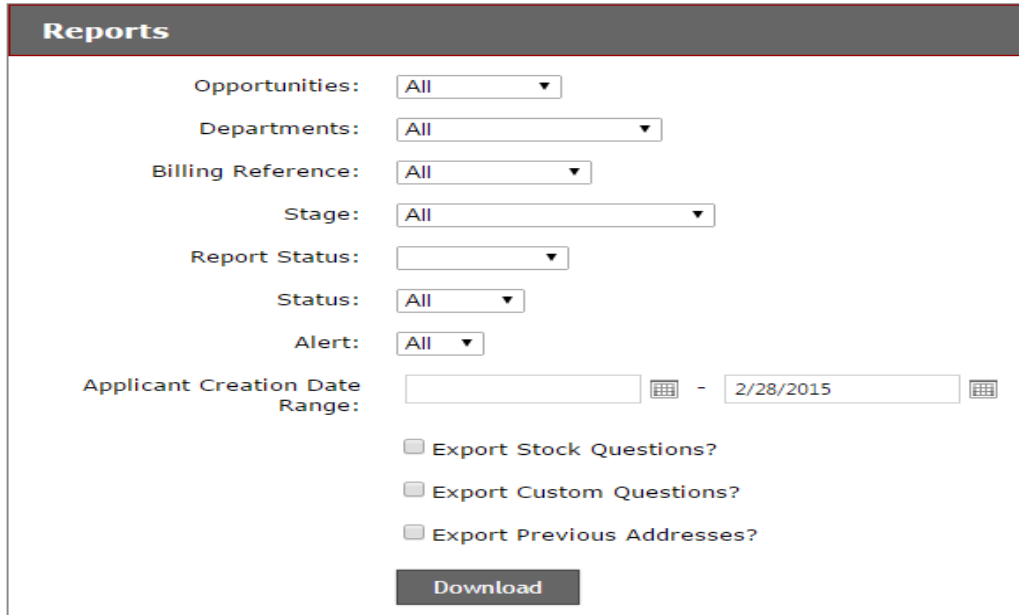
**Please add [ApplicantFirstName], [ApplicantLastName], [ClientName] and [InvitationLink] tag in email body**

## Downloading Reports <sup>01234</sup>

*Main Menu > Reports*

From the Main Menu, select Reports and then select Export Reports

A number of filters exist for customizing the data prior to export.



The screenshot shows a web interface titled "Reports" with a dark header. Below the header, there are several filter options, each with a dropdown menu or input field:

- Opportunities: All
- Departments: All
- Billing Reference: All
- Stage: All
- Report Status: (empty dropdown)
- Status: All
- Alert: All
- Applicant Creation Date Range: (empty date field) - 2/28/2015

Below these filters, there are three checkboxes:

- Export Stock Questions?
- Export Custom Questions?
- Export Previous Addresses?

At the bottom of the form is a dark "Download" button.

Click Download and an Excel file will be created for the data.

If you need to save the data in a CSV or flat file format: from within Excel, choose File, Save As and change the file type to what you need.

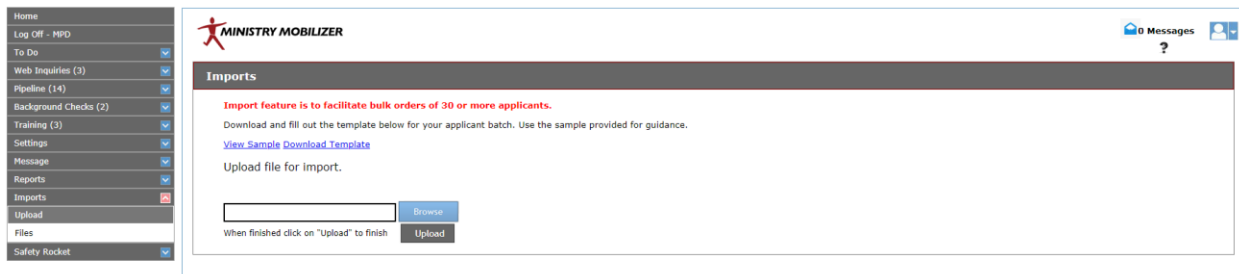
You can also export data directly from the grids in Pipeline, Background Checks and Child Safety Training by simply clicking on the export buttons in the lower right-hand corner of those pages.

## Importing Applicants <sup>01234</sup>

Main Menu > Imports

You can upload batch information for many applicants at one time using the Imports feature. A minimum of 50 applicants is required.

From the main menu select Upload from the Imports section.



From this screen you are provided with a sample image and template for your import. All information required must be formatted properly and included with your file. Create your file and save.

Click on browse and locate the file with the applicants' information that you wish to upload.

Click on upload. After your file is uploaded successfully, customer service will be notified of your upload and can begin processing your request. They will delete the file after the import is successful. No files with SSN information should be stored once imported.

## To Do <sup>4</sup>

Use the To Do function to schedule a follow up activity with a prospective volunteer. From the Main Menu, select To Do. (This feature can also be accessed through the Check box and action menu)

Select the Owner for the To Do from the drop-down menu. Fill out all pertinent information

- System Notification will be sent to this user's email.

The screenshot shows the Ministry Mobilizer interface. On the left is a sidebar menu with the following items: Home, Log Off - jflo33, To Do (with a dropdown arrow), Web Inquiries (19) (with an up arrow), Open (16), Closed (3), Pipeline (505) (with a dropdown arrow), Background Checks (108) (with a dropdown arrow), Training (140) (with a dropdown arrow), Settings (with a dropdown arrow), Message (with a dropdown arrow), Reports (with a dropdown arrow), Imports (with a dropdown arrow), and Safety Rocket (with a dropdown arrow). The main content area is titled 'MINISTRY MOBILIZER' and 'To Do Detail - (click save button for changes)'. It features two tabs: 'To Do' (selected) and 'Notes'. A callout box points to the 'Notes' tab with the text: 'Use the Notes tab to save additional notes regarding the applicant or task.' Below the tabs is a form with the following fields: Date (with a calendar icon), Owner (a dropdown menu showing 'Jennifer Fowlers'), Due (with a calendar icon), and Subject (a text input field).

## Safety Rocket <sup>4</sup> (or with add-on to account)

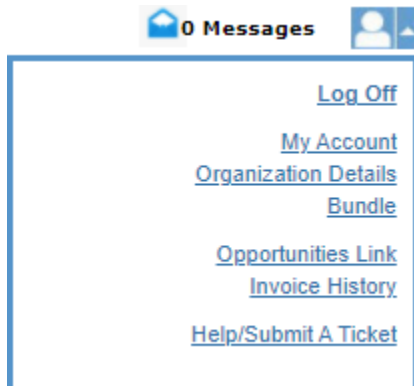
Main Menu > Safety Rocket

Safety Rocket is available to Bundles 4 at no charge or can be added to any other bundle account for an annual fee. Safety Rocket provides a series of modules (videos, ebooks, supporting documents, etc) that are designed for church safety in areas such as Human Resources, Insurance, Safety Procedures and more. You can call and have this feature added on to any bundle.

The screenshot shows the 'Safety Rocket' menu. The menu is titled 'Safety Rocket' and has an up arrow icon. Below the title are six modules: Module #1: Background Checks, Module #2: Human Resources, Module #3: Facilities, Module #4: Child Safety, Module #5: Insurance, and Module #6: Safety Procedures. To the right of the modules is a list of add-on options: Add-On Documents, Ebook, Video, and Audio.

## Account Information <sup>01234</sup>

There is an account tab in the upper right hand corner of each page. From within this tab, you can manage your user account (change password, update name and email information), review and update your organization's details (if you are authorized to do so for your account), review your bundle information and opportunity link for your organization, submit help tickets and view invoices for your account if authorized.



## Email Notifications

You will receive email notifications for the following:

1. Client receives email notification when an application has been received:

New application by Jan Snow.

Log into your account for details.

<https://www.mobilizemyministry.com/login>

2. Client receives email notification when an application has been received for an applicant under the age of 18:

The following Applicant has submitted their details as their age is below 18

**Applicant First Name : Jan**

**Applicant Last Name : Snow**

**Applicant Email Id : jsnow@email.com**

For your convenience, please [click here](#) for a sample authorization and consent form requesting applicant and parental consent

Log into your account for details.

<https://www.mobilizemyministry.com/login>

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3. Client receives an email when a background check report is complete for an applicant:

Your report for Barbara Wren, (Secretary), has been completed.

Log into your account for details.

<https://www.mobilizemyministry.com/login>

4. Client receives an email when an applicant declines to authorize the background check:

The following applicant has declined to accept the terms of the background check authorization:

**Applicant First Name** : Michael

**Applicant Last Name** : Jones

**Applicant Email Id** : mjones@email.com

**Log into your account for details.**

<https://www.mobilizemyministry.com/login>

5. Client receives an email when a Child Safety Training has been completed:

Training has been completed by FirstName Jack LastName Fox

Score: 96.

Log into your account for details.

<https://mobilizemyministry.com/login>

6. Client receives an email when a web inquiry for their account is received:

New mobilizemyministry.com Web Inquiry

Log into your account for details.

<https://www.mobilizemyministry.com/login>



BUNDLE 1

BUNDLE 2

BUNDLE 3

BUNDLE 4

SCREEN				
Rescreen Notifications	✓	✓	✓	✓
Volunteer Tracking	✓	✓	✓	✓
AUTHORIZE				
Background Consent Form	-	✓	✓	✓
Customized Legal Agreement	-	✓	✓	✓
eSignature Authorization	-	✓	✓	✓
Custom Branding	-	✓	✓	✓
PROCESS				
Online Application Form	-	-	✓	✓
Online Policy Agreement	-	-	✓	✓
Notes Tracking	-	-	✓	✓
Screening Process Management	-	-	✓	✓
Document Uploading	-	-	✓	✓
Export to Excel	-	-	✓	✓
RECRUIT				
Ministry Job Board	-	-	-	✓
Ministry Position Descriptions	-	-	-	✓
Unlimited Campuses & Departments	-	-	-	✓
Volunteer Contact Management	-	-	-	✓
Activity Scheduling	-	-	-	✓
Safety Rocket	-	-	-	✓