

Building Management Portal

General and role-based FAQs for onboarding, testing, and early use

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Purpose of this document

This document provides practical FAQs for diocesan teams and role-specific users of the Building Management Portal. It supports onboarding, testing, and early use as dioceses prepare to move from the Online Faculty System to BMP. It should be read alongside the onboarding email, CMS guidance, training videos, Viva Engage community, and the formal Microsoft Form route for reporting issues.

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Part 1: General FAQs

Core message

The legal process has not changed. BMP provides a more structured way of managing the same faculty, List A, and List B processes, with role-based access, clearer workflow stages, and better case visibility.

1. How to use this document

Who is this document for?

This document is for diocesan teams and role-specific BMP users. It is intended to support onboarding, UAT, imported case validation, and early live use. It includes general FAQs for all users and role-based FAQs for applicants, DAC Secretaries, archdeacons, registrars, chancellors, consultees, and CMS superusers.

What should I read first?

Start with the general FAQs if you need to understand the rollout approach, reporting route, Viva Engage, Microsoft Forms, CMS integration, imported data, or training videos. Then use the role-based section that matches your role or the role of the user you are supporting.

Does this replace local diocesan guidance?

No. This document explains the national system and common support patterns. Dioceses may still provide local instructions about who users should contact locally, how they manage casework internally, and how they want parish users to engage with the DAC team.

Does this replace the formal support route?

No. The FAQs are a first point of reference. Issues that relate to a specific user, case, church, document, CMS record, imported case, notification, workflow stage, or access problem should be reported through the Microsoft Form provided for BMP onboarding and testing.

2. Support routes, reporting, and triage

Where should dioceses go for help during onboarding?

Support will work through three linked routes. The onboarding documents will be sent directly by email; the BMP Viva Engage community will be used for general questions, shared learning, reminders, and grouped updates; and a Microsoft Form will be used for formal issue reporting.

When should I use Viva Engage?

Use Viva Engage for general questions, shared learning, common answers, and rollout updates. It is useful for asking whether other dioceses have seen the same issue, where to find guidance, or how a process is expected to work.

When should I use the Microsoft Form?

Use the Microsoft Form for specific issues that need to be logged, reviewed, triaged, and tracked. This includes user access problems, CMS-linked role issues, imported case data, document problems, workflow blockers, notification issues, public notice questions, and anything urgent or case-specific.

Why not use Viva Engage as the ticket list?

Viva Engage is a discussion and shared learning space. It is not suitable as the formal issue log because posts can become scattered across discussion threads. The Microsoft Form provides structured intake so the project team can categorise, prioritise, and manage requests consistently.

How will issues be grouped?

Issues will be grouped into practical categories such as registration and access, CMS and role mapping, imported case data, documents and downloads, workflow and forms, notifications and emails, guidance or expected behaviour, enhancement requests, and urgent blockers.

Triage statuses

Received — The issue or request has been submitted and is awaiting review.

Accepted — The issue has been reviewed and accepted for action.

In review — The issue is being checked, reproduced, or assessed.

Working on — The issue is with the project/admin team or supplier.

Needs diocesan input — Further information or testing is needed from the diocese.

Done — The issue has been resolved, answered, released, or otherwise closed.

Not accepted — The issue is a duplicate, expected behaviour, outside scope, or not a system issue.

Future enhancement — The request is useful but not required for rollout.

How will dioceses see what is happening?

Dioceses will not be expected to interpret raw ticket lists. Updates should be grouped thematically, explaining what has been resolved, what is being tested, what requires diocesan validation, what is being worked on, and what is being treated as a future enhancement.

3. Viva Engage and Microsoft Forms

Where is the BMP Viva Engage community?

The BMP Viva Engage community is the shared space for rollout discussion, general questions, common answers, and updates.

Community link: [BMP Viva Engage community](#) (access restricted)

How should questions be posted in Viva Engage?

Where possible, use the question format rather than a general discussion post. This makes answers easier to reuse and allows a clear answer to be marked where appropriate. General updates should be posted by agreed administrators as announcements or update posts.

What should be pinned or highlighted in Viva Engage?

The community should make the most important links easy to find: the onboarding documents, Microsoft Form, current training videos, CMS guidance, key dates, and any grouped issue updates. It should not become the only place where the official documents exist; dioceses will also receive the documents by email.

How will Microsoft Forms help?

The reporting form gives dioceses one consistent way to report issues. It also means responses can be exported, reviewed, categorised, and used in a tracker. Where possible, Power Automate may be used to connect the form, tracker, and communications updates, subject to testing.

What should the reporting form ask for?

The form should ask for the diocese, reporter, user affected, user role, case reference, church name, CHR ID where known, whether the case is new or imported, current workflow stage, expected behaviour, actual behaviour, whether the issue repeats, and any supporting screenshots or notes.

4. Training videos and parish feedback

Are the current videos final?

No. Current videos are available as interim support material. They should not be treated as the final national training offer. Parish users are currently being asked for feedback on their experience of the portal, and updates to the videos should follow review of that feedback.

Why wait for parish feedback before updating videos?

The aim is to make revised videos respond to real user experience rather than updating them in isolation. If parish users identify repeated points of confusion, those can be turned into shorter, more targeted videos or written guidance.

Will more training material be produced?

Yes. Further role-based and task-based guidance is expected, especially for later workflow stages and recurring user questions. The direction should be shorter, more targeted resources rather than longer generic videos.

5. CofE Portal administration

What is the CofE Portal admin function?

User administration is being strengthened through new functionality in the CofE Portal. This is a core administrative function for managing users, roles, and access more effectively. It is not simply a help route for end users.

Why is this important for BMP?

Many pilot queries related to registration, role approval, CMS links, users not seeing expected churches, or users seeing too much. Stronger administrative tools will make it easier for the national/admin team to manage user records, support role allocation, and resolve access issues where users need to be connected to the right diocese, church, role, or CMS-linked profile.

Does the Portal admin function replace local diocesan approval?

No. Local dioceses still need to approve and manage appropriate access for their own users. The admin function supports user management and troubleshooting, especially where there are cross-diocese, role, CMS, or profile-linking issues.

6. CMS integration and imported case data

Is CMS integration required?

No. CMS integration is optional. BMP can operate without CMS integration through manual user and role management. Where CMS data is well structured, integration can improve user management and automate access. Where CMS data is not ready, it is better to use BMP manually until local CMS records have been reviewed and improved.

Why does CMS data matter?

Where CMS integration is used, BMP depends on local CMS data to understand roles, people, places, buildings, and church links. If that data is incomplete or structured in a way that does not align with the legal or ecclesiastical model, access may not work as expected.

What should be checked before integration is used?

Before relying on CMS integration, the diocese should check the place hierarchy, benefice-parish-church relationships, whether churches are recorded as buildings, CHR IDs, local role mappings, user-role relationships, and whether exceptions are better handled manually in BMP.

Should building-level access be modelled in CMS?

Usually no. CMS role structures should not be distorted to create many building-level access routes. Where specific exceptions are needed, these are often better handled directly in BMP rather than by creating fragile or overly complex CMS role structures.

What is an imported case?

An imported case is a case transferred from OFS into BMP. Imported cases may behave differently from new cases because they were created under a different system, with different data structures, historic document arrangements, or legacy workflow states.

Should imported case differences always be treated as system defects?

No. Some differences may arise from historic data, local practice, or the way the original OFS record was structured. Imported case issues should be checked carefully and reported with clear examples where something appears wrong or blocks the case from progressing.

Why is the testing period longer for imported cases?

The pilot showed that the system can support live casework, but imported OFS data needs careful validation once brought into the new workflow, permissions, document, and notification model. The longer testing period gives dioceses time to check their own imported cases and raise data-specific issues before final migration.

7. Before reporting an issue

Checklist before reporting

Before using the issue form, check whether the user is in the correct role and diocese, whether the case is expected to be visible at the current workflow stage, whether the user has logged out and back in, whether CMS is involved, and whether the issue repeats. Good information at the point of reporting helps avoid duplication and speeds up triage.

- Are you using the correct role in BMP?
- Are you in the correct diocese?
- Is the church or case expected to be visible to that role?
- Has the user logged out and back in after any access or role change?
- If CMS is being used, has the role, place, building, and CHR ID been checked?
- Is the case at the correct workflow stage for the action being attempted?
- Is this a new case or an imported/historic case?
- Is the issue repeatable, or did it occur once?
- Can you provide the case reference, user email, church, role, diocese, expected behaviour, and actual behaviour?

Part 2: Role-based FAQs

Use this section to find the questions most relevant to each BMP role. It focuses on the practical points users are likely to encounter during onboarding, testing, and early live use, including access, case visibility, forms, documents, consultation, public notice, CMS-linked access, imported cases, and issue reporting.

BMP presents some tasks differently from OFS. A form, document, action, or download may appear in a different tab, at a later workflow stage, in a review view, or as part of a generated document. Where a function is no longer available in the same way, check whether it has moved, is now limited to a different role or stage, or has been restricted to reflect the correct process.

8. Applicants and parish users

What is the Building Management Portal?

It is the system used to apply for permission to carry out works to a church, its contents, or churchyard. The existing permissions framework remains in place; the portal provides the digital route for preparing, submitting, and managing applications.

How do I access the system?

Access is through the Church of England Portal. Use the BMP link and choose the option to log in with CofE Portal. You may need to complete one-time registration so the system can link you to your role and church.

Why do I need a code when I log in?

The login process uses an additional security check. The code confirms your identity and helps protect case records and personal data.

Can I have more than one role?

Yes. A user can have more than one role where this reflects their responsibilities. You should select the correct role for the task you are carrying out.

Where do my access rights come from?

Your access may come from CMS, where your diocese uses CMS integration, or it may be assigned manually in BMP. You do not necessarily need to be in CMS. Agents, consultants, or people acting for a parish can be given access directly in BMP.

Why can I not see my church?

This usually means the system has not linked your account to the correct role, church, or diocese. It may also mean your access is awaiting approval.

First checks:

Confirm you are using the correct email address.

Confirm you are using the correct role.

Check whether your access has been approved.

Contact your DAC Secretary with your email address, church, role, and what you expected to see.

Why can I see too many churches?

Your role may have been assigned too broadly, for example at benefice or grouping level rather than the church or parish level intended.

First checks:

Tell your DAC Secretary which churches you can see.

Explain which church or churches you expected to access.

If CMS is being used, the diocese may need to check the role and place assignment in CMS.

What are List A, List B, and Faculty applications?

List A covers works that may be carried out without further permission if the rules are met. List B requires approval, usually through the Archdeacon route. A faculty application is the full formal route for more significant works.

How do I start an application?

Use the option to explore case types or start a case, and select the route that best fits the proposed works. If you are unsure whether the work is List A, List B, or faculty, contact your DAC Secretary before submitting.

What is Form 1?

Form 1 is the first stage of a faculty application. It records the proposal, the building, any professionals involved, and the items or areas affected. It helps the DAC understand what advice is needed before the full application is completed.

What happens after I start a faculty application?

A faculty application normally moves through several stages. You may be asked to provide proposal details, statements, plans, photographs, specifications, consultation information, public notice information, and other supporting documents. Some stages are completed by the applicant, while others are completed by the DAC, registry, Chancellor, or another role.

What is Form 3A?

Form 3A is the main petition stage of a faculty application. It is where the formal request for permission is completed and supported by the documents needed for the decision-making process.

Why is Form 3A split into more than one part?

In BMP, Form 3A is split into petition parts so the application can be completed in stages. Petition part 1 captures the first part of the formal petition information. Petition part 2 continues the formal petition to the Consistory Court and asks for additional information needed before the application is submitted for legal review.

Can both petition parts be edited?

Yes. The petition parts remain editable while the case is at the relevant applicant completion or review stage. After each DAC review phase, applicants may have the opportunity to make final edits before the application is submitted to the Registrar for legal review.

Why can I not see petition part 2 yet?

Petition part 2 may not appear until the case reaches the relevant workflow stage. This is expected. BMP releases some actions later in the workflow so users only see the material they need at the appropriate point.

Why is the Form 1 item list limited?

The list is filtered so applicants are not shown every technical category in the system. This is intended to keep the form manageable and avoid unnecessary confusion. If you cannot find the exact item, choose the closest sensible option. The DAC can review and adjust the categorisation later.

What if I cannot find the exact item of interest?

Choose the closest sensible option and explain the proposal clearly in the description. Do not restart the application simply because the exact wording is not available. The DAC can review the categorisation later.

Do I need separate Statements of Significance and Need?

Normally these are separate documents. If they are combined or already exist, upload the document. The DAC can assign it to the correct statement field as the case progresses.

Why does the system still ask for statements if I have already uploaded them?

The workflow needs to identify which documents formally fulfil the statement requirements. This may mean assigning an existing uploaded document to the correct field rather than uploading it again.

Why did my document upload fail?

Upload issues can arise from file type, file size, permissions, connection issues, or a temporary storage issue.

First checks:

Retry once.

Check the file type and file size.

Check that the file name is not unusually long or complex.

If it still fails, report the case reference, file name, file type, and what happened.

Why can I download one file but not the whole case?

Whole-case download depends on processing all relevant case data and documents together. If an individual file is available but the full case download fails, report the case reference and explain which download worked and which did not.

Why am I not receiving notifications?

Notifications depend on your role, church link, case stage, and email address. You should check the portal itself rather than relying only on email notifications.

First checks:

Check junk or spam folders.

Confirm the correct email address is being used.

Ask the DAC Secretary to confirm your role and church link.

Check the case directly in BMP.

Can work continue if I am not fully set up?

In some cases, the diocese may be able to continue internal casework, but you may not receive system notifications until your access is correctly linked. The diocese may need to contact you outside the system while access is being resolved.

I am used to a form, document, or action being available somewhere else. Has it been removed?

Not usually. BMP presents some information differently from OFS. A form, document, action, or download may be available in a different tab, at a later stage, through a review page, or as part of a generated document. If something appears to be missing, check the current workflow stage and ask the DAC Secretary before assuming the function has been removed.

Who should I contact first?

Contact your DAC Secretary or the diocesan contact named in local onboarding material. Use the Microsoft Form only where the diocese or project team asks for a formal issue report, or where the issue is part of UAT/testing.

9. DAC Secretaries and diocesan casework teams

What is my role in BMP?

You manage user access, workflow progression, consultation, document handling, categorisation, and the practical accuracy of case data for your diocese.

What should DAC teams do during onboarding?

Review the onboarding documents, confirm local contacts, identify CMS superusers where relevant, test representative cases, check imported records, and make sure users understand where to find guidance and how to report issues. Testing should cover the full user journey: access, imported cases, List A, List B, faculty cases, documents, statements, consultation, public notice, registry stages, Chancellor stages, generated documents, notifications, and movement between workflow stages.

How should user access be managed?

Access may come from CMS or from manual assignment in BMP. Manual assignment is appropriate for exception users, agents, consultants, and users whose access does not fit the standard CMS model.

What should I check before approving access?

Check the user email address, requested role, diocese, church or place link, whether the access requested is appropriate, whether access is CMS-driven or manual, and whether the user needs access to one church, a parish, a benefice, or a wider group.

What if my diocese is not ready for CMS integration?

Use BMP manually. CMS integration is optional and should not be enabled until the local place structure, building records, CHR IDs, and role mappings are reliable enough to drive access. Manual operation is a valid onboarding route.

How do I handle incorrect permissions?

Check four things in order: the user record, the role, the place or church link, and whether access comes from CMS or manual BMP assignment. After changes, ask the user to log out and back in.

Why do permissions sometimes not update immediately?

Some role and session information may not refresh until the user logs out and back in. If CMS is involved, there may also be a delay or a data issue in the role/place relationship.

How should Form 1 categorisation issues be handled?

Applicants select from a filtered list. If the choice is not ideal, correct the categorisation within the case where possible rather than sending the user back unnecessarily.

How should existing statements or supporting documents be handled?

Proceed through the required workflow step and assign the existing document to the relevant statement or document field. Avoid asking the applicant to resubmit material unless the document itself is inadequate.

How should Form 3A and petition-stage issues be handled?

Check whether the case is at the correct workflow stage, whether all required fields are complete, whether the right documents have been assigned, and whether the user has permission to complete that action. If the problem persists, report the case reference, user role, current stage, expected behaviour, and actual behaviour.

How should the split Form 3A petition parts be explained to users?

Explain that BMP separates the petition into stages. Petition part 1 and petition part 2 are both part of Form 3A. Both are editable while the case is at the relevant applicant completion or review stage. Petition part 2 may not be visible until the case reaches the point where that information is needed.

What should I check when a case cannot move forward?

Check the current workflow stage, missing required fields, document assignments, role permissions, earlier incomplete steps, and whether the case is new or imported. If the case is imported, check whether the issue appears to come from historic OFS data, missing mapped fields, legacy document structure, or a genuine BMP workflow issue.

How should public notice questions be handled?

Confirm whether the case has reached the public notice stage, whether the notice material has been generated correctly, whether the applicant or parish needs to take any local action, and whether the registry or Chancellor needs visibility. If generated wording, dates, case details, or public material appear wrong, report the issue formally.

How should consultation questions be handled?

Check that the case is at the correct consultation stage, the right consultees or amenity bodies have been selected, invitations have been issued to the correct email addresses, and responses are linked to the right case. If a response has been submitted but does not appear, report the case reference, consultee email, invitation details, and expected response location.

How should “this used to be available in OFS” queries be handled?

Check whether the function is now available somewhere else, appears later in the workflow, belongs to a different role, or is included in a generated document. Some OFS behaviours are not being replicated because they gave access to material too early, allowed the wrong role to edit a form, or exposed information that should not have been available in that way.

Why do imported cases sometimes behave differently?

Imported or historic cases can contain inconsistent data, missing fields, or legacy structures. Treat these case by case and report specific examples rather than assuming every difference is a system defect.

How should dioceses test imported cases?

Use a sample of real cases that cover current live activity, recently completed applications, document-heavy cases, List B cases, faculty cases, public notice, consultation, and registry/chancellor stages. Focus on whether the case behaves correctly, not just whether it appears in the system.

What should go to Viva Engage and what should go to the form?

Use Viva Engage for general questions, shared learning, and discussion. Use the Microsoft Form for specific issues requiring triage, including user access, imported case data, CMS configuration, workflow problems, documents, notifications, or blockers.

How should issues be escalated?

Use a structured report through the Microsoft Form. Include the case reference, user email, user role, diocese, church, current stage, expected behaviour, actual behaviour, whether the issue is repeatable, and screenshots if useful.

How should dioceses handle parish users who need support?

Where possible, direct users to the relevant role-based guidance and videos first. If the issue is about access or a specific case, gather the key details and report through the formal route if it cannot be resolved locally.

What should be communicated locally?

Explain where users should start, who their local contact is, where the videos are, what the BMP Viva Engage community is for, and how formal issues should be reported. Avoid sending users into multiple informal channels without a clear route.

How should duplicate issues be handled?

If an issue appears to have already been reported, add further detail to the existing entry where possible rather than creating a duplicate. If using Viva Engage, direct users to the existing answer or grouped update.

How should urgent blockers be reported?

Use the Microsoft Form and mark the issue clearly as a blocker. Include the case reference, user role, action being attempted, and why the issue prevents testing or case progression.

10. Archdeacons

How do I access BMP?

Log in through the CofE Portal and select your Archdeacon role where more than one role is available.

What determines which List B cases I see?

Case visibility depends on your role, the church or place relationship, and the current workflow stage.

Why can I not see a case I expected?

The most common causes are role assignment, place mapping, or the case not yet being at your workflow stage.

First checks:

Confirm you are using the Archdeacon role.

Ask the DAC Secretary to confirm the case stage.

Confirm the relevant church or archdeaconry link.

If CMS is used, check the CMS role/place relationship.

How do I review a List B case?

Review the case when it reaches the Archdeacon stage and complete the determination step available to your role.

Why can I not act on a case I can see?

You may be able to view a case before the action is available, or the case may be missing required information from an earlier stage. Check with the DAC Secretary whether the case has reached the correct workflow point for an Archdeacon determination.

What should I check before determining a List B case?

Check that the case is at the Archdeacon stage, the proposal is clear, any supporting documents are present, and any required DAC or diocesan steps have been completed.

Can I add conditions to an approval?

Yes, where the workflow provides for conditions at that stage. If the option is not available, check whether the case is at the correct stage and whether your role is active.

What if I cannot complete a stage?

Check for missing required information, incomplete previous steps, document issues, a permissions problem, or the case being at the wrong workflow stage. If the issue persists, report the case reference and the stage where the problem occurs.

Why might I receive unexpected notifications?

Notifications are role-based and stage-based. Unexpected emails may indicate a role-linking issue, workflow timing issue, or incorrect place association.

What should I report?

Report issues where you cannot see a case you should see, cannot complete your determination, cannot add conditions where expected, are receiving emails for cases outside your scope, or see incorrect case information that affects your decision.

Should I use Viva Engage?

Use Viva Engage for general questions or shared learning. Use the formal reporting route for a specific case, access issue, or workflow blocker.

11. Registrars and registry teams

What is BMP used for from a registry perspective?

BMP provides visibility of case records, supporting documents, public notices, workflow status, and legal decision points.

What should I expect to see?

You should expect to see the case material required for decision-making at the relevant stage. This may include the petition, statements, supporting documents, consultation responses, public notice material, registry information, and relevant workflow history.

What should registries check during onboarding?

Check visibility of faculty cases, petition material, supporting documents, public notices, consultation information, generated documents, determinations, notifications, and imported cases that may already be part-way through the legal process.

How do I access registry cases?

Log in through the CofE Portal and select your Registrar role. Case visibility depends on role assignment, diocese, church link, and workflow stage.

Why can I not see a case?

Check that you are using the Registrar role, the case is at a stage visible to the registry, the case is linked to the expected diocese/church, your role has been approved, and the issue is not related to imported case data.

How are public notices handled?

Public notices are generated and made available at the relevant stage. Some petition material and supporting documentation may be publicly inspectable where required by the Faculty Jurisdiction Rules.

Can documents be shared externally?

Where required for statutory or procedural purposes, relevant material may be shared or made available. Consider the case stage and the legal/public notice requirements before using any external route.

Why might notifications not be received?

Notification behaviour depends on role linkage, recipient association, workflow stage, and system notification logic. The portal should be treated as the primary record, not email alone.

Why might older or imported cases look incomplete?

Historic data may not map perfectly into the new system because older records were created under different system rules or with incomplete fields. Check the original record where needed and report only missing critical information that affects progression or legal validity.

What if a certificate or notice appears wrong?

Record the case reference, the type of notice or certificate, the wording or data that appears wrong, and what you expected to see. Report through the formal route if the issue affects the legal record, public notice, or case progression.

Where should I look if a document is not available where I expected it?

Check the case stage, forms area, documents area, latest application update and advice, generated documents, and any review view available to the Registrar role. BMP may present a document differently from OFS, especially where it is intended to be viewed in the browser rather than downloaded as a standalone file.

Why might a document be viewable but not downloadable?

Some documents are intentionally presented through the browser or through a review view rather than as standalone downloads. This may be to prevent material being exposed to the wrong users or included in the wrong download bundle. If the document is needed for the legal record, check whether it appears in the relevant generated document or form stage before reporting it as missing.

What should be reported?

Report issues where a required document is missing, a public notice or certificate appears incorrect, a case cannot progress, a user cannot access a required case, imported data appears to affect the legal record, or notifications are being sent to the wrong party.

How should registry queries be separated from local process questions?

If the question is about local registry practice, manage it locally. If it concerns system behaviour, generated documents, access, imported data, notification routing, or workflow progression, use the formal issue route.

12. Chancellors

How do I access BMP?

Log in through the CofE Portal and select your Chancellor role. If the role is missing, contact the registry or DAC Secretary so the access route can be checked.

What is my role in BMP?

BMP provides access to case materials, supporting documents, determinations, and workflow records needed for decision-making.

How are decisions recorded?

Decisions are recorded within the relevant workflow step and form part of the legal case record.

Why might a case not be ready for decision?

The case may still be awaiting required information, consultation, public notice, registry review, document assignment, or completion of an earlier workflow step. The registry or DAC Secretary can confirm whether the case is ready for Chancellor action.

Why might I receive unexpected emails?

Notifications are role-based and stage-based. Unexpected emails may indicate role linkage, church association, or workflow timing issues.

What if information looks inconsistent?

Treat the case individually and report the anomaly with the case reference, document names, current stage, description of the inconsistency, and whether the case is imported or new. Historic or imported cases may need additional checking.

Who should I contact if something is wrong?

Usually the registry or DAC Secretary, depending on local practice. They can confirm whether the issue is role access, case workflow, imported data, or system behaviour.

What should be reported formally?

Use the formal issue route where a case cannot be accessed, a document is missing, a decision cannot be recorded, a generated document appears wrong, or imported data appears to affect the decision record.

Should general process questions go through the issue form?

No. General questions can be raised through local registry or diocesan routes, or through Viva Engage where they may be useful to other dioceses. Use the form where investigation or tracking is required.

13. Consultees and external advisers

How do I access a consultation?

Use the invitation or access route provided by the diocese. Access depends on the invitation being issued at the correct stage and linked to the case.

Why can I not access a consultation case?

The invitation may not have been issued correctly, the case may not be at the consultation stage, or the access link may not be connected to the right role or email address.

Why can I not access documents?

The invitation may have been issued to a different email address, the case may not yet be at consultation stage, the invitation may need to be reissued, or the response route may not be linked correctly to the case.

First checks:

- Confirm the email address used for the invitation.
- Confirm the case reference.
- Contact the inviting diocese with the access problem.
- Ask whether the invitation needs to be reissued.

How should I submit a consultation response?

Use the route provided through the case where available. If a response does not appear as expected, the diocese should check the submission route and case stage.

Do I need CMS access?

Usually no. Consultees, consultants, agents, and advisers can normally be managed through BMP access routes rather than diocesan CMS linkage.

What if my response has been submitted but does not appear?

The diocese should check whether the response was submitted through the correct route, whether the case is at the correct stage, whether the response is linked to the correct invitation, and whether the user/email address matches the invited consultee.

Can consultees use Viva Engage?

The Viva Engage community is mainly for diocesan rollout discussion and support. Consultees should usually contact the inviting diocese for case-specific matters.

What should the diocese report formally?

Report cases where a consultee cannot access a case, an invitation cannot be issued, a response does not link correctly, consultation dates appear wrong, or the wrong consultee/amenity body appears in the case record.

14. CMS superusers and diocesan data leads

What does CMS do for BMP?

CMS can supply roles, people, and place relationships. BMP maps local CMS roles to fixed national BMP roles and uses place relationships to determine the scope of access.

Is CMS integration required?

No. CMS integration is optional. BMP can operate through manual user and role management. CMS should only drive BMP access where the local place structure, building records, CHR IDs, role mappings, public-role settings, and user-role relationships are reliable enough to support it. Where CMS data is not ready, manual BMP management is the safer route until the CMS has been reviewed and corrected.

What should be checked before enabling CMS integration?

Check that the CMS has a reliable legal place hierarchy, churches are recorded as buildings, CHR IDs are present, relevant CMS roles are public and mapped to BMP roles, place relationships are appropriate, and the API key has been created and shared through the agreed route.

How should roles be mapped?

Map only roles with predictable access needs. Do not map every local role simply because it exists. Use manual BMP assignment for one-off or specialist access.

Why do users see too many churches?

The role is probably attached to a broader place than intended, or a local grouping is being used in a way that gives wider access than the user should have.

Why do users see too few churches?

The user may be linked to the wrong place, the church may not be correctly represented as a building, the CHR ID may be missing, or the role may not be mapped.

Can a non-public CMS role stop the role reaching BMP?

Yes. If the relevant CMS role is set as non-public, it may not be exposed through the API, even though the role appears correct in CMS. When a role is missing from BMP, check the role settings in CMS and confirm whether the role is public before treating the issue as a BMP defect.

Why might CMS linkage fail for some users?

CMS linkage depends on correct identifiers and valid relationships between user, role, place, and building records. It may fail if a role is not mapped, a church is not recorded as a building, a CHR ID is missing, the user is linked to the wrong place, or the relevant CMS role is set as non-public and is not exposed through the API.

Who is responsible for correcting CMS data?

The local diocese remains responsible for local CMS data quality, role definitions, place structures, and configuration decisions. National support can help identify how CMS data is affecting BMP access, but it does not replace local responsibility for CMS records.

Should all access be modelled in CMS?

No. CMS should not be distorted to handle every exception. Where access is unusual, short term, or specific to an individual case, manual BMP assignment may be more appropriate.

What information should be provided when reporting a CMS-linked access issue?

Provide the user email, user role, place assignment, church name, CHR ID if known, expected access, actual access, whether access is CMS-driven or manually assigned in BMP, and any recent changes made in CMS.

How should CMS superuser sessions be used?

CMS superuser sessions should focus on local readiness: place structures, building records, CHR IDs, role mapping, local variations, common access issues, and the decision about whether to use CMS integration at go-live or operate BMP manually first.

What is a good CMS readiness test?

Select a small number of known users and churches, check their CMS roles and place links, confirm the church has a valid CHR ID and is recorded as a building, and test whether the resulting BMP access matches what the diocese expects.

What if the CMS data is not ready?

Do not connect unready data simply to meet a rollout date. Use BMP manual access management while the CMS is reviewed. Connecting incomplete or inconsistent CMS data is likely to create avoidable access issues.

What should be treated as a CMS issue rather than a BMP defect?

If the user is correctly authenticated but access is wrong because the role, place, building, CHR ID, public-role setting, or CMS relationship is wrong, the source issue is likely CMS data or configuration rather than a BMP system defect.

What should CMS superusers include in an access report?

Provide the user email address, CMS contact, role, place assignment, church name, CHR ID if known, expected access, actual access, whether the user is CMS-driven or manually assigned in BMP, whether the role is public, and any recent CMS changes.

15. General troubleshooting and escalation standard

User cannot see a church or case

Likely causes include role not approved, wrong role selected, church link missing, CMS data issue, manual assignment missing, or the case not being at a visible stage.

First checks:

Check role, place, church, and case stage.

Ask the user to log out and back in.

Check whether access is CMS-driven or manual.

If CMS is involved, check whether the relevant CMS role is set as non-public, as this may stop it being exposed through the API.

Report through the Microsoft Form if unresolved.

User sees too many churches

Likely causes include a role assigned at too broad a level, CMS place structure being too broad, local grouping being used for access, or role mapping being too wide.

First checks:

Review the place level.
Check CMS role mapping if used.
Confirm what access the user should have.
Avoid manually changing BMP before understanding the source.

Permissions do not update

Likely causes include session state, delayed role refresh, CMS sync issue, or incorrect role/place assignment.

First checks:

Ask the user to log out and back in.
Re-check the role source.
Confirm whether the role is CMS-driven or manual.
Report if the issue persists.

A document says access is restricted

Likely causes include a temporary permissions mismatch, role refresh issue, session state, or the user role not being connected to the case.

First checks:

Return to the homepage.
Reopen the case.
Log out and back in.
Check role and case access.

Case, Form 3A, or petition stage cannot move forward

Likely causes include required information missing, required documents or statements not being assigned, an earlier workflow step being incomplete, the case being at the wrong stage, or the user lacking permission for the action. Check all sections for missing information, confirm the current workflow stage, check document assignments, and confirm the user role. If unresolved, report the case reference and the specific point where the process stops.

Petition part 2 is not visible

Check whether the case has reached the workflow stage where petition part 2 is released. For new BMP cases, petition part 2 may be hidden until the applicant petition completion stage. For imported cases, historic data may make the form appear differently from a newly created case.

A user says something used to be available in OFS

Check whether the function appears elsewhere in BMP, is available later in the workflow, belongs to a different role, or is part of a generated document or review view. If it has been removed or restricted, confirm whether the previous behaviour was appropriate for that role and stage before treating it as a lost function.

Emails are missing or unexpected

Likely causes include notification rules affected by role, stage-based recipient logic, incorrect user or church association, email address mismatch, or imported case history.

First checks:

Check the portal record.
Confirm the role/church association.
Check email address and junk folder.
Do not rely only on email; check the case directly in BMP.

Statements are uploaded but still appear outstanding

The document may be uploaded but not assigned to the formal statement requirement. Assign the existing document where possible rather than asking for a duplicate upload.

Public notice appears wrong or unavailable

Check the case stage, generated notice, proposal details, church details, dates, and whether the notice should be visible to that role. Report formally if the issue affects public notice or the legal process.

Consultation invitation or response is missing

Check the invited email address, consultation stage, invitation status, response route, and whether the response is linked to the correct case.

Generated documents appear wrong

Record the case reference, document type, wording or field that appears wrong, expected wording or value, and whether the case is new or imported.

An imported case looks wrong

Likely causes include historic OFS data structure, missing imported field, legacy workflow state, document mapping issue, or local practice not matching the new workflow.

First checks:

Check the original case reference.

Confirm whether the issue affects progression.

Check whether the case is new or imported.

Report through the Microsoft Form with clear details.

A general question keeps coming up

If the question is general and not case-specific, post it in Viva Engage as a question so the answer can be reused by others. If the answer reveals a gap in guidance, it can be added to future FAQs or videos.

Escalation standard

When escalating an issue, include: case reference; diocese; church; user name and email; user role; current workflow stage; whether the case is new or imported; expected behaviour; actual behaviour; whether the issue repeats; any relevant screenshots; and whether CMS is involved. This avoids duplicate investigation and makes it clearer whether the cause is CMS data, BMP configuration, imported data, workflow, or expected system behaviour.

Appendix: Current training video links

The following videos are available as current support material. They should be reviewed alongside parish-user feedback before being treated as the final national training offer.

- [Building Management Portal – Introduction](#)
- [Registration and account management](#)
- [List A works](#)
- [List B works](#)
- [Add more churches to profile](#)
- [Starting a faculty](#)
- [Form 1](#)
- [Petition part 1](#)
- [Statements](#)
- [Formal consultation](#)

Final note

These FAQs will continue to develop as onboarding progresses. The current document provides a practical first point of reference, but it should be used alongside onboarding emails, the BMP Viva Engage community, Microsoft Form reporting route, CMS guidance, and training videos. Parish-user feedback is being gathered and will inform future updates to training materials and guidance. The aim is to ensure that any further updates respond to real user experience and the issues dioceses identify during testing.