

Caring Documentation

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Overview of Caring Documentation

The Minister for Community Care is responsible for all caring documentation in Planning Center Online (PCO).

General guidelines for notes in PCO

- Document the basic, “need to know” information. Keep notes succinct.
- Write for a future audience *that is not you*. Don’t make assumptions that the reader of the note knows what you know about the person. (e.g. the name of the person’s spouse)
- Caring Notes and Pastoral Notes can also be used to document verbatim encounters with congregants (e.g. an email setting a boundary)

All notes are created in the People module of PCO: <https://people.planningcenteronline.com/>

Caring Notes

- Documentation of pastoral care provided, change in life circumstances in congregant, or attempt at offering pastoral care. Visible to ministers, caring listeners, and key staff members
 - **Example of caring note:** Jane Doe will be having hip replacement surgery on April 25. She is well supported by her partner, Jill, and her sisterhood group. She would appreciate a caring kit, but doesn't want to be mentioned in the caring corner or prayer. CL Rick Jones will follow up.
 - **Process:**
 - Open PCO People profile of the person about whom you wish to write the note
 - Click "Notes" > New Note >
 - Category = Caring Notes
 - Type text into field of caring note. If this is documenting care offered by someone other than you, please name them at the beginning. Use "CL" as an abbreviation for Caring Listener (see above example)
 - Click "Create"

Pastoral Notes

- Documentation of sensitive information regarding spiritual/emotional status of congregant. Visible only to ministers.
 - **Example of pastoral note:** Jane Doe disclosed that she suspects her spouse has dementia. I was the first person she mentioned this to — she doesn't plan on sharing with anyone else at this time.
 - **Process:**
 - Open PCO People profile of the person about whom you wish to write the note
 - Click "Notes" > New Note >
 - Category = Pastoral Notes
 - Type text into field of pastoral note.
 - Click "Create"
 - **Very Sensitive Information:** If you have a concern about putting very sensitive information in PCO, share it with the other ministers in a Signal chat instead.

Active Pastoral Prayer Notes

- Documentation of a prayer or sharing of a life event. Please write using language that could easily be used in a prayer. Unless otherwise specified, Active Pastoral Prayer Notes will trigger the three things below. **Please note if any of these is not desired by the congregant.**
1. Pastoral prayer: This person will be mentioned in the next pastoral prayer in a Sunday service. This may NOT be the upcoming Sunday, as we do not consistently offer pastoral prayers on a weekly basis.
 2. Caring corner of the newsletter: This person will be mentioned in the caring corner located at the bottom of the upcoming Friday e-newsletter.
 3. Caring cards: This person will receive cards from our Caring Card Team.
 - **Examples of Active Pastoral Prayer note**: Our love is with Jane Doe as she recovers from cardiac surgery. We celebrate the life and mourn the death of Foothills member John Doe, who passed away early Monday morning at age 87.
 - **Process**:
 - Open PCO People profile of the person about whom you wish to write the note
 - Click “Notes” > New Note >
 - Category = Active Pastoral Prayer Notes
 - Type text into field of active pastoral prayer note.
 - Click “Create”Ac

Caring Kit Notes

- **Caring Kit Notes:** This documents what kind of caring kit the congregant received. This note gets created as part of the Caring Kit workflow. [[link here](#)]

Community Care Fund Notes

This note documents the receipt of Community Care Funds by stating the amount received and the reason for funds. This note helps us track community care funds, which are disbursed to congregants just once or twice a year. Formerly known as Ministerial Discretionary Fund Notes.

- **Example of Community Care Fund note:** John Doe received \$700 from the Community Care Fund for auto repairs.
- **Process:**
 - Open PCO People profile of the person about whom you wish to write the note
 - Click “Notes” > New Note >
 - Category = Community Care Fund Notes
 - Type text into field of Community Care Fund note.
 - Click “Create”

Safety and Behavioral Notes

This note category is dedicated to essential information relevant to understanding an individual's behaviors or safety concerns. This may include, but is not limited to, issues with adhering to our covenant of right relationships, cognitive impairments, and limited access agreements.

The purpose of these notes is to provide a centralized and accessible reference point for any queries regarding an individual's behavior. To maintain clarity and efficiency, we aim to have one comprehensive note per individual, which should be regularly updated and revised to reflect the most current information.

All staff members can create these notes and have access to them, ensuring that essential information is readily available to everyone. If something seems “off” with a congregant, look in their profile in PCO to see if there is a Safety and Behavioral Note.

Please post about a new Safety and Behavioral note on Basecamp if it's something that the whole staff should be aware of.

Examples of notes:

Example Safety and Behavioral Note 1- Senior with Dementia

- **Description:** This member has been diagnosed with dementia. They may exhibit forgetfulness, confusion about locations and people, and difficulty with communication.
- **Safety Considerations:** Ensure a calm and familiar environment. Avoid overwhelming them with too much information or too many people at once. Be patient and offer gentle reminders as needed.
- **Behavioral Strategies:** Speak clearly and use simple sentences. Maintain eye contact to ensure they feel engaged. It's crucial to monitor their comfort and safety, especially during group activities.
- **Emergency Contacts:** [List of Family Members or Caregivers], [Contact Information]

Example Safety and Behavioral Note 2 - Young Adult with Emotional Disabilities

- **Description:** This member has emotional disabilities that can result in intense emotions expressed in non-normative ways. They may have sudden outbursts or show extreme emotional reactions to situations.
- **Safety Considerations:** Be aware of the member's personal space and comfort levels. Avoid confrontational approaches and provide a quiet space where they can calm down if needed.
- **Behavioral Strategies:** Use a calm and reassuring tone. Listen actively and acknowledge their feelings. Provide clear, consistent, and predictable responses. Prepare for potential emotional outbursts with a de-escalation plan.
- **Emergency Contacts:** [Therapist/Counselor's Name], [Contact Information]

Example Safety and Behavioral Note 3- Sex Offender Attending Church

- **Description:** This member is a registered sex offender and is currently on parole. They are subject to a Limited Access Agreement as part of their involvement in our church community.
- **Safety Considerations:** Adherence to all legal requirements and parole conditions is mandatory. The member is not allowed in certain areas and situations as stipulated by the Limited Access Agreement to ensure the safety of the community and compliance with legal restrictions.
- **Limited Access Agreement - Conduct Rules:**
 1. **Area Restrictions:** No access to children's or youth areas.
 2. **Supervised Participation:** Must be accompanied by a designated supervisor at all times on church premises.
 3. **No Contact with Minors:** Prohibited from any form of contact with children or youth.
 4. **Event Limitations:** Only attends specific, pre-approved church services/events.
- **Process:**
 - Open PCO People profile of the person about whom you wish to write the note
 - Click "Notes" > New Note >
 - Category = Safety and Behavioral Notes
 - Type text into field of Safety and Behavioral note.
 - Click "Create"