

## How to Add Pastoral Notes (& why!)

Pastoral notes are a private way to add notes to a person's file in PCO. Only staff and Elders can see these notes.

The purpose of Pastoral Notes is to efficiently communicate with our team about Belmont family updates.

### What qualifies as a note?

When you have a scheduled meet with someone.

When someone has a life changing event – death in the family, job loss, etc.

When a pastoral need arises.

If you're still unsure, ask yourself the following: *would this information be helpful to someone down the road who is connecting with this person?* If the answer is yes, it qualifies as a note.

### TIPS:

- You don't have to capture the entire scope of your connection in a note. If you had a long lunch with Bob who is having marriage trouble, don't detail the entire conversation in a note. Just write: *Had lunch with Bob, he's going through some tough times – prayed with him and will follow up. DW*

Although Notes are private, we still need to be sensitive about the information that is shared. If someone wants to know more about Bob's situation, they can follow up directly with the author of the note.

- Always Initial the note with the person who had the interaction.
- You can add a note immediately after the event or on a daily or even weekly rhythm.

**Notes are not meant to create more administrative burden. If you're having trouble finding a rhythm inputting notes, reach out to me and we'll explore some ways to make this a better process!**

The Planning Center People App can serve as a convenient way to input notes from your phone – download the app:

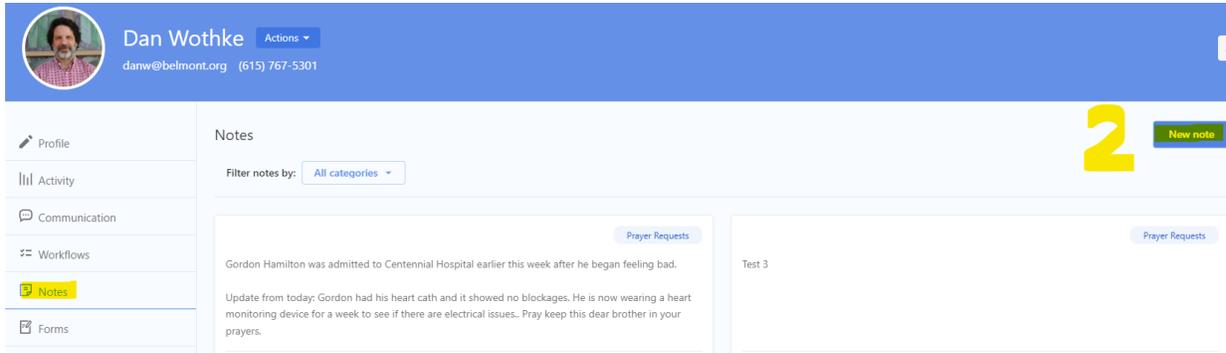
Android: <https://play.google.com/store/apps/details?id=com.ministrycentered.people>

Apple: <https://apps.apple.com/us/app/planning-center-people/id1029697457>

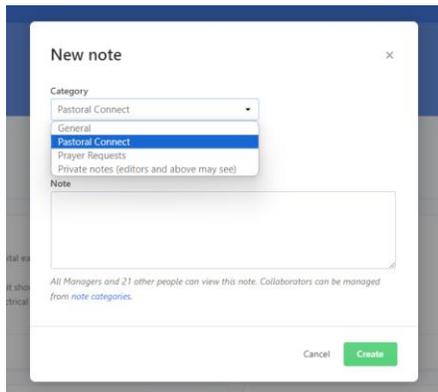
# HOW to add a note:

Website: <https://people.planningcenteronline.com/>

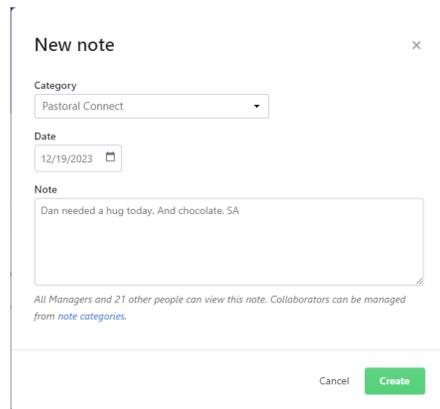
Go to the People page and go to the person's account. Click on 1) Notes then 2) New Note



Choose Pastoral Connect from the drop down **\*\*this is important so it remains private\*\***

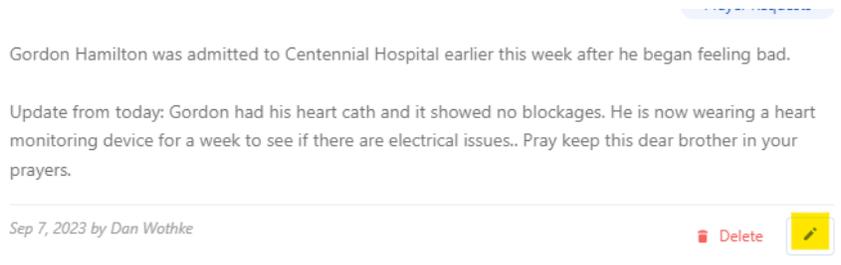


Adjust the date if needed and add in the note. Once you hit create, the note is complete:



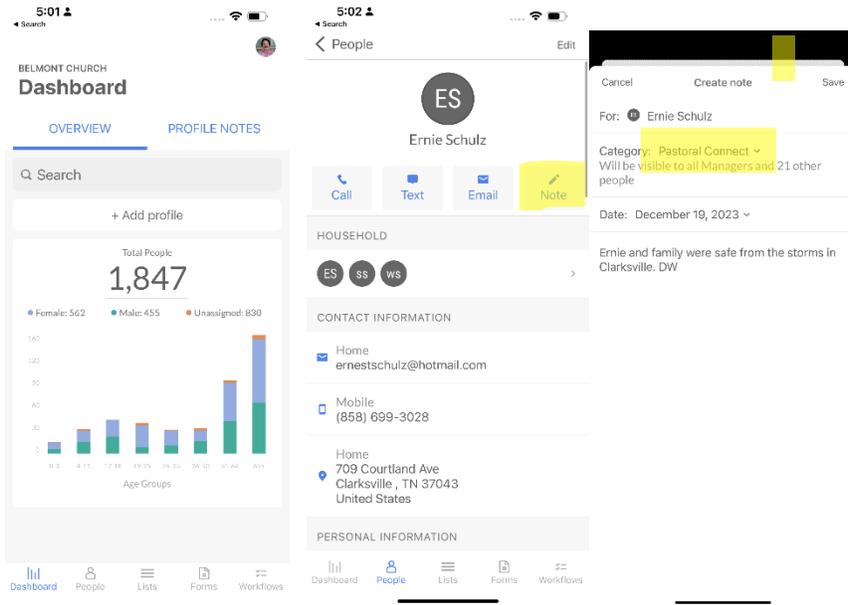
*Everyone who has permission to create notes will receive a daily email summary of all notes.*

Once a note is complete, you have the ability to go back and edit by clicking on the pencil in the bottom right corner of the note:



## How to update on the APP:

Open the People app and search for the person – click add note – choose Pastoral Connect  
**\*\*Important\*\*** and fill in the note.



To view past notes, scroll down on the person's profile page and click Notes.

