# Shepherd Care Manual

*A practical guide to pastoral contact and follow-through*



*Every Person Cared For*

Shepherd Staff Resources

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## Every Person Cared For

Shepherd Care gives the main pastor and up to two additional pastors an organized place to remember people, plan personal contact, and record what has happened. Use this manual to establish your care rhythm and keep each person's information, history, and next step together.

The church uses its own telephone, texting, email, and mailing services. Shepherd Care organizes reminders and records completed work; it does not send congregation messages or make calls.

## Inside this manual

One  Begin with your church and people

Two  Set your care rhythm and perfect week

Three  Work from a person's care card

Four  Plan visits and follow through

Five  Share care with your pastoral team

Quick reference  Your first week and regular review

Church name _____

Main pastor _____

# Chapter One Begin With Your Church

Start with the correct church workspace and your own account. Every pastor should sign in separately. A shared password makes it difficult to distinguish responsibilities and protect pastoral notes.

## Main pastor and additional pastors

The church owner is the main pastor. The church can have three pastoral users in total: the main pastor and up to two additional pastors. Additional pastors join the existing church through an invitation; they should not create a new church to accept that invitation.

## Your dashboard

My dashboard brings together your daily activities, people needing attention, and visit capacity. Your planned activities and availability are personal. The main pastor can review the church's people and records; additional pastors work with designated people.

## Choose the right time zone

Set the church time zone in Care rhythm before entering visit times. Contact intervals and the church time zone are shared settings managed by the main pastor. Visit targets, personal availability, days off, and blocked weeks belong to the individual pastor.

## Begin with a manageable group

Add a few people, review their cards, and record a real completed contact before importing the full congregation. Sample Church demonstration people are fictional examples. Do not treat demonstration history as actual church ministry.

## Keep contact methods outside the platform

Call with your phone, send a text or email through your usual service, or mail a thinking of you card. Return to the person's card to record the completed activity. Authentication verification and recovery messages support account access; they do not connect a congregation email campaign service.

# Build Your Congregation Directory

Congregation keeps one record for each individual. Upload people rather than counting families as one person. Shared family contact details are acceptable when the individuals have different names.

## Add a person

Enter first and last name, then any available email, phone, and mailing address. Choose a status that reflects what you know: Visitor, Returning visitor, Member, Inactive, or Not yet classified. Open Details on the person's card to correct information later.

## Upload a list

- Download the CSV template from Congregation, or export your spreadsheet as CSV.
- Upload the file, match its columns, and inspect the preview. First and last names are required.
- Correct invalid entries before importing. Review possible duplicates rather than adding the same person twice.
- Import the approved rows, then open several cards to confirm names and contact details.

The importer supports up to 1,000 people and a 500 KB CSV. It can work with full-name columns and separate address columns. It does not overwrite existing records or private history. Importing people does not send messages or mark any outreach complete.

## Archive without losing the story

Archive a person when active reminders should pause. Their history and notes remain available. Complete or cancel scheduled visits first. Restore the person when they return to active care, and review their status and contact details.

## Download a copy when needed

Use the congregation CSV download for active or archived people. The export excludes private notes. Store downloads carefully and share only with people who need the information for their church responsibilities.

# Chapter Two Set Your Care Rhythm

Care rhythm answers a simple question: how many months should pass before you repeat each kind of contact with the same person? The church can set separate intervals for phone calls, texts, thinking of you cards, emails, and personal visits.

| Setting | Meaning |
| --- | --- |
| 12 months | Repeat that type about once a year. |
| 6 months | Repeat that type about twice a year. |
| 24 months | Repeat that type about once every two years. |

## Each contact type has its own clock

Completing a phone call updates the phone-call rotation. It does not reset the text, card, email, or visit reminder. The next reminder is calculated from the recorded completion date. Someone with no completed contact of that type is ready for a first connection.

## Set realistic visit capacity

Choose visits or lunches per week and target active weeks per year. For example, three visits each week across 46 active weeks allows 138 visits in a year. A 250-person congregation would take about 22 months at that pace, before considering cancellations or different needs.

## Leave room for time away

Block full weeks for vacation, travel, or speaking at other churches. Add individual weeks or a range. Overlapping periods count once. Your target active weeks already allows time away; the estimate adjusts when available weeks fall below that target.

## Use reminders with pastoral judgment

The rotation highlights people waiting for contact. It does not determine who matters most. A recent loss, urgent need, or requested conversation may require you to change the day’s plan. Record the changed commitment so it remains visible.

# Build Your Perfect Week

Perfect week gives brief outreach a place in the day. Use the suggested pattern or adjust it to your schedule. Each active day can contain phone call, text, thinking of you card, or email activities. Brief activities use 15-minute slots; personal visits keep their own duration.

## Choose your working days

Turn off your days of rest or other unavailable days. Adjust activity times and types, then save the plan. Visits must also fit the selected visit-availability windows. Blocked weeks pause daily suggestions.

## Use the suggested daily target

The automatic suggestion uses the number of active individuals, target active weeks, and active weekdays. With 46 weeks and five active days, 300 people suggests two activities each day; 500 suggests three. You can override the suggestion to fit a realistic workload.

## Remember what the target measures

The daily target is a planning starting point. It is not a promise that every outreach type will reach every person within the year. Several types, shorter repeat intervals, and overdue contacts may require more activities. Review the queue and adjust your rhythm or capacity.

## Keep visits separate

Set the days and hours available for one-on-one visits. A brief email slot does not become a visit booking. Use My visit planner to schedule a visit with its actual duration, after arranging it directly with the person.

## Organization creates flexibility

A clear schedule makes it easier to respond when someone needs immediate attention. Move a time block, reschedule a follow-up, or change a visit while keeping the original commitment visible. Organization gives you a dependable plan to adjust.

# Chapter Three Work From the Care Card

Open a person from Congregation or Contact rotation. Compact buttons keep their information together, so you can review the person's story before reaching out.

| Button | Use it for |
| --- | --- |
| Details | Contact information, status, and edits. |
| Pastor assignments | Default pastor and additional assigned pastors. |
| Care | Last completed outreach and the next due dates. |
| History and notes | Completed contacts and private pastoral notes. |
| Visits | Visit information available to your account. |
| Follow-ups | A dated reminder for this person. |
| Task completed | Record outreach you actually completed. |

## See what needs attention

Care at a glance uses check marks and status wording to distinguish contact that is current from contact needing attention. Review the next due date when needed. The color identifies the outreach type; it does not by itself indicate completion.

## Keep current cards compact

Caught-up people can remain collapsed so people with tasks needing attention take less searching. Expand a person's card whenever you need their information. Collapsing a card does not archive the person or remove history.

## Edit the right person

Confirm the name before changing details or recording activity. Update stale phone numbers, addresses, and membership status as you learn them. If a save reports that the record changed elsewhere, review the latest information before trying again.

# Choose the Next Connection

Contact rotation groups outstanding contact into one card per person. Choose an outreach type to bring matching people to the top. People waiting longest appear first, so the next personal connection is easier to identify.

| Outreach type | Color | Where the work happens |
|---|---|---|
| Phone call | Orange | Your usual phone. |
| Text | Green | Your usual texting service. |
| Thinking of you card | Gold | A handwritten or printed card you mail. |
| Email | Blue | Your usual email service. |
| Visit or lunch | Purple | A meeting arranged directly with the person. |

## Use the card before making contact

Review contact details, relevant history, the assigned pastor, and any existing follow-up. Avoid duplicating a pending activity another assigned pastor is handling. A scheduled visit remains due until it is actually completed.

## Record Task completed

After the activity happens, choose the matching type and completion date on the person’s card. Add a useful note when appropriate. The matching rotation advances from that date. Do not complete an activity simply because it was scheduled or attempted.

## When the person cannot be reached

Create or reschedule a follow-up for another suitable time. Record a brief factual note if it will help the next conversation. A call that did not result in the intended contact should not be recorded as a completed conversation merely to clear the queue.

## Use personal care rather than a quota

The aim is dependable attention to people. A daily number helps organize the work; it should not encourage rushed conversations or repeated contact that the person does not want.

# History Notes and Follow Ups

History and notes belongs to the selected person's care card. Review it before a call or visit, and record only what will help thoughtful pastoral follow-through.

## Completed contact and a private note are different

A completed contact records the type and date of outreach and advances that type's rotation. An independent private note records information without changing contact dates or daily task counts. Use the separate note form when no outreach was completed.

## Understand who can read notes

The main pastor can review all pastoral notes in the church workspace. Additional pastors see only designated people, and other pastors' private note text is hidden from them, including on jointly assigned people. Do not promise that a note is hidden from the main pastor.

## Write useful notes

Use factual, respectful language. Distinguish what the person said from your own observation. Avoid unnecessary sensitive detail. Keep preparation notes and follow-up instructions clear enough to support the next appropriate action.

## Create a specific follow-up

Choose the person, outreach type, date, and suitable time. Brief outreach uses 15-minute slots. A visit reminder does not reserve a visit-calendar appointment. Schedule that separately in My visit planner when you are ready to book it.

## Adjust the commitment

Reschedule, snooze seven days, or cancel a follow-up when appropriate. My follow-ups brings pending tasks together. Complete the task after the action happens. Saved daily tasks remain stable when you refresh, rather than repeatedly selecting a different person.

# Chapter Four Plan Personal Visits

My visit planner shows appointments and outreach time blocks on a daily calendar. Times use the church time zone and a familiar 12-hour display, such as 11am to 1pm.

## Set available windows

Choose the weekdays and starting and ending times when you can meet people. New visits must fit fully inside an available window. Days off and blocked weeks prevent new bookings and flag affected existing visits for review.

## Arrange the visit directly

Ask the person about availability and agree on the place and time using your usual phone, text, or email service. Saving an appointment in Shepherd Care does not send an invitation or confirm the person's acceptance.

## Save the appointment

Choose the person, start time, duration, and any location or preparation notes you need. Visits may last 15 to 360 minutes. The planner checks availability, overlapping appointments, blocked weeks, and duplicate pending visits for that person.

## Reschedule rather than lose the commitment

Open the appointment block and choose a new suitable time. Contact the person directly about the change. Existing appointments are retained when you alter availability or block time away, so review any flagged conflict and make a deliberate change.

## Record the outcome

Complete a visit only after it has happened. Completing the scheduled appointment creates its linked visit contact and advances the visit rotation. Cancelling does not create a completed contact. Review past pending appointments so they do not remain uncertain.

## Print a working plan

Use the weekly print or download option in Follow-ups or the Visit Planner. The plan contains saved tasks and appointments for the chosen week, with private notes excluded. Keep any paper copy secure.

# Chapter Five Share Care With Your Team

The main pastor leads the church workspace and can add up to two other pastors. Each pastor uses a separate account, personal dashboard, weekly plan, availability, and blocked weeks. Shared assignment and contact records help the team coordinate.

## Invite an additional pastor

- Open Account and access as the main pastor. Enter the invited pastor’s name and exact account email.
- Choose people to designate when creating the invitation, if appropriate. Share the invitation link through your own communication service.
- The recipient opens the invitation and signs in or registers with that exact email. They join this church rather than creating a new church.
- If verification is required, enter the code sent to that email on the invitation screen. After joining, confirm that designated people appear.

## Use the correct account

An invitation for one email cannot be accepted while signed in as another email. Use the account-switch option on that page. If an invitation has expired or been revoked, the main pastor should create a current invitation. Do not share passwords.

## Keep within the three pastor limit

Active additional pastors and pending invitations reserve places. Revoke an unused invitation or access that is no longer needed before inviting a replacement. A revoked invitation should not restore access.

## When the dashboard is empty

Confirm the correct church workspace and signed-in email. Then ask the main pastor to designate people to that pastor. A connected pastor with no assignments does not need to create another church.

# Assign People and Respect Access

Each person has one default pastor and can have additional designated pastors. The main pastor manages these assignments from the person's card. Use pastors' names to make responsibility clear.

| User | People and records |
| --- | --- |
| Main pastor | All church people, care activity, visit details, and pastoral notes. |
| Additional pastor | Designated people only; other pastors' private note text stays hidden. |

## Set one clear default

Choose the pastor primarily responsible for the person. Daily reminders follow the default assignment. Add another pastor when the person should be shared. Additional responsibility should be intentional, rather than giving every pastor the full directory.

## Coordinate shared care

Before creating another activity, review existing tasks and completed outreach. Additional pastors can coordinate follow-ups for designated people. A person's card can indicate that a visit belongs to another pastor without revealing that pastor's private preparation notes.

## Review changes in responsibility

When assignments change, review pending reminders and any existing appointments. Reassignment can move reminders from removed assignees to the default pastor, while existing appointments remain with their creator. Agree on handover directly rather than assuming a visit has moved.

## Keep ministry roles distinct

Shepherd Care is the pastoral reminder and contact-rotation workspace. The separate Care Ministry Manual describes suggested practical support plans for Shepherd Care Plus, coordinators, and volunteers. Reading that guide does not grant those roles access to this platform.

## Review access regularly

Remove access that is no longer needed. Keep accounts personal and sign out on shared devices. Explain the main pastor's review access before entering pastoral notes.

# Quick Reference Your First Week

| When | Action |
|---|---|
| Before starting | Confirm church workspace, account, and time zone. |
| First setup | Add or import people and review their statuses. |
| Set the rhythm | Choose repeat intervals and realistic visit capacity. |
| Build the week | Choose activities, working days, visit windows, and time away. |
| Prepare the team | Invite additional pastors and designate people. |
| Each working day | Review today's tasks and open the person's card. |
| After contact | Record Task completed or set a new follow-up. |
| Weekly review | Resolve overdue tasks and visit conflicts; adjust the coming week. |

## Example of one person's care

A returning visitor is designated to Pastor James. He reviews the person's card, sends a text through his own phone, and records the text as completed. He adds a short note and schedules a call for the following week. The text reminder advances; the call reminder retains its own timing. After arranging lunch directly, he books it inside his available visit window.

## A short weekly review

- Who needs attention now, and who has waited longest?
- Which tasks or past visits need a clear outcome?
- Are contact details and pastoral assignments current?
- Does the coming week fit available time and days off?
- Should any care be handed over or followed up personally?

## Where to find help

Open Help and Manuals in the platform for this guide and the separate Care Ministry Manual. For account recovery, use the recovery option on sign-in and follow the account-holder verification process. Never send passwords or private pastoral notes as a support request.

This guide describes the current Shepherd Care workflow. Treat suggested rhythms as adjustable ministry choices and continue reviewing them as your church and pastoral team change.