





Transform Your Pastoral Care Ministry

CareNote is the only pastoral care platform that empowers you to deliver exceptional care while saving up to 80% on software costs. Our volunteer-friendly system makes it possible for your entire care team to use the platform.

-  **Comprehensive Care**
From detailed congregant profiles to intelligent care request routing, manage your entire ministry effectively.
-  **Intelligent Automation**
Smart routing algorithms and automated workflows revolutionize how you deliver care.
-  **Real-Time Insights**
Monitor team interactions and generate professional reports with comprehensive analytics.
-  **Seamless Integration**
Integrates with Planning Center Online and supports multi-channel communications.

Smart Routing

Automatically assign care requests to the right team members based on expertise and workload.

Automated Workflows

Streamline care delivery with intelligent processes that maintain the personal touch.

Smart Notifications

Stay informed with intelligent alerts about care needs and follow-ups.

Automated Follow-ups

Never miss a follow-up with automated reminders and task management.

Time-Saving Tools

Reduce administrative burden with smart tools that automate routine tasks.

Personal Touch

Maintain meaningful connections while leveraging automation for efficiency.

Real Time Activity Feed

The Activity Feed displays a chronological list of all pastoral care interactions, including updates, notes, tasks, milestones, care groups, and requests for care, showing who received care, what type of interaction occurred, when it happened, which provider was involved, and key details about the interaction.

Tasks, Birthdays, Milestones

The Dashboard highlights key pastoral care moments at a glance, ensuring nothing falls through the cracks. You'll see tasks that need attention today, birthdays to celebrate, and milestones to acknowledge. Clicking on a card takes you directly to the full list, making it easy to take action. Plus, each card provides a preview of what's coming up this week, helping your church stay proactive in care and connection.

The screenshot shows the CareNote dashboard interface. On the left is a navigation sidebar with options: Dashboard, People, Care (27), Updates (10), Tasks, Milestones, Notes, Groups, Forms, Reports, Settings, and Team. The main content area is titled 'Dashboard' and features three summary cards: 'Tasks Due Today' (0 tasks due this week), 'Birthdays Today' (0 birthdays this week), and 'Milestones Today' (0 milestones this week). Below these is the 'Activity Feed' section, which includes a search bar and a table of interactions.

Name	Type	Date	Provider	Details
Jovan Gerhold	CareRequest	Mar 8, 2025	Sonia Wyche	Jovan has been attending the church intermittently for the past year but has struggled with integrating into the community due to past church hurt. Despite efforts to engage, such as reaching out via email and attending a group activity, Jovan feels isolated, ignored, and has not received any responses or greetings. Jovan is seeking someone with patience to help them and their family connect with the church community, requesting one-on-one time o...
Jason Fried	Note	Mar 5, 2025	Donnell Wyche	Does this note get sync'd to Planning Center Online automatically?
Jason Williams	Task	Feb 28, 2025	Sonia Wyche	1. Shannon: Shannon, a young adult who recently began attending Scio Westminster Church, has requested a pastoral visit to share more about their faith journey and how they've connected with the church. During the visit, Shannon hopes to discuss their desire to take the next step in their spiritual journey by getting baptized. This care request highlights their excitement about becoming more involved in the church community.
Jason Williams	Update	Feb 18, 2025	Michael Jenkins	Shannon, a young adult who recently began attending Scio Westminster Church, has requested a pastoral visit to share more about their faith journey and how they've connected with the church. During the visit, Shannon hopes to discuss their desire to take the next step in their spiritual journey by getting baptized. This care request highlights their excitement about becoming more involved in the church community.
May Wisozk	Group	Feb 19, 2025		Added to the Life Care - Michael Jenkins Group
Jason Williams	Group	Feb 19, 2025		Added to the Life Care - Michael Jenkins Group
Jason Fried	CareRequest	Mar 6, 2025	Donnell Wyche	Jason would like communion next week.
Jason Fried	CareRequest	Feb 19, 2025	Michael Jenkins	This is next weeks' assignment

A Clear View of Pastoral Care

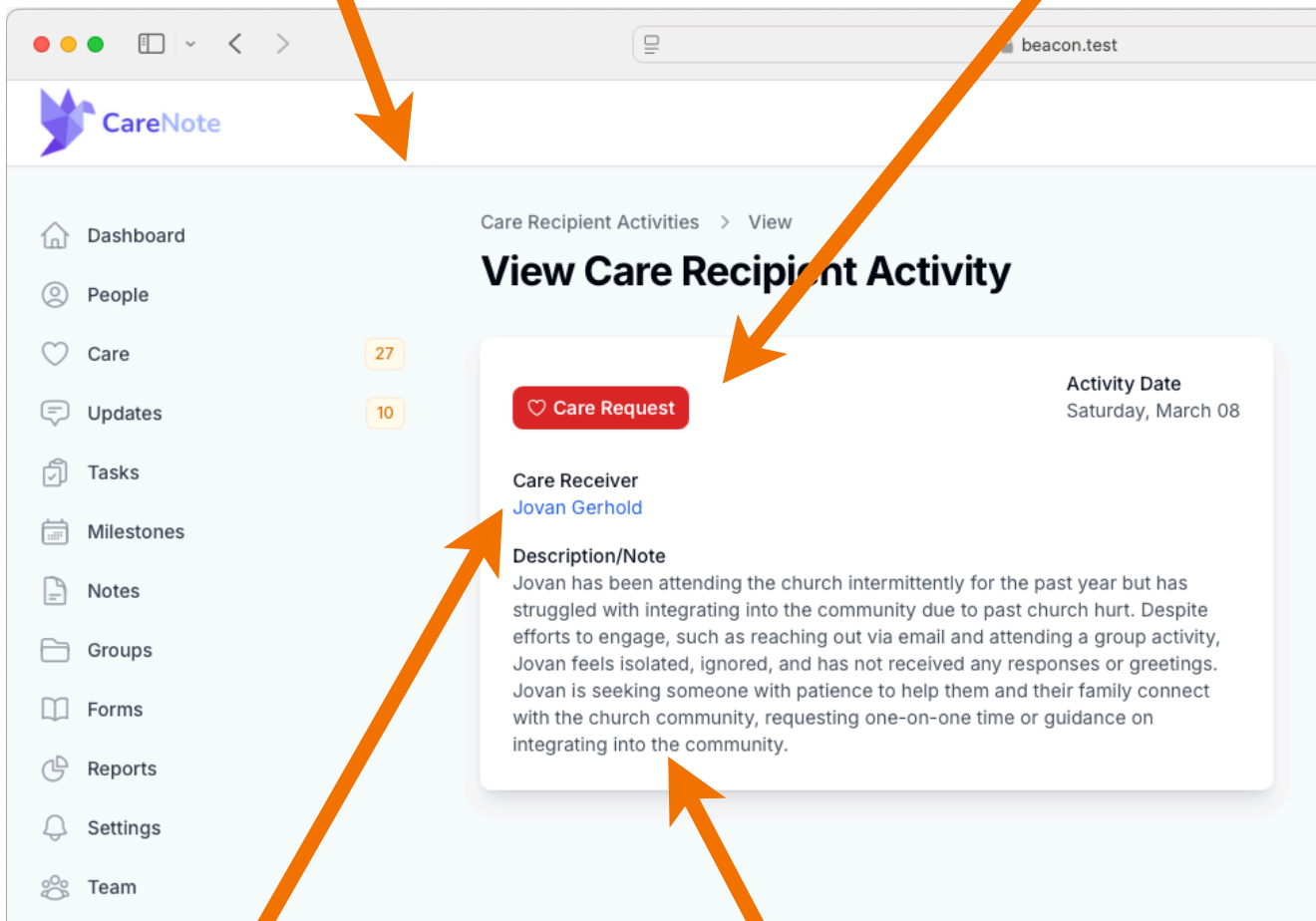
CareNote gives you a real-time window into your church's pastoral care efforts, making it easy to track interactions, celebrate important moments, and ensure no need goes unnoticed. Whether you're following up on a care request, checking in on milestones, or organizing team assignments, CareNote keeps everything organized and actionable—so your church can focus on what truly matters: caring for people.

Viewing Care Recipient Activity

Clicking on an item in the Activity Feed brings you to this detailed view, providing a clear snapshot of the care interaction.

Activity Type

The activity type (Care Request, Task, Update, Milestone, or Group) follows, giving context to the interaction.



Care Recipient

The first link highlights the care recipient, ensuring you know who the care is focused on.

Activity Details

Finally, the details offer insight into what happened, why it matters, and any necessary follow-ups.

Viewing Care Recipient's Profile

Clicking on a Care Receiver's name or link opens their profile page, providing a centralized hub for their demographic details and complete care history. From this page, you can document and add Care Requests, Updates, Notes, Tasks, Milestones, Groups, Documents, and Workflows—all in one place.

The profile view also includes powerful search capabilities, making it easy to find specific interactions. If you're new to CareNote, this screen serves as your primary workspace for navigating between tabs to capture care moments, assign care to team members, or review past activities, ensuring nothing gets overlooked.

The screenshot displays the CareNote interface for viewing a care recipient's profile. The browser address bar shows 'beacon.test'. The CareNote logo is in the top left, and a search bar is in the top right. The left sidebar contains navigation options: Dashboard, People (selected), Care (27), Updates (10), Tasks, Milestones, Notes, Groups, Forms, Reports, Settings, and Team. The main content area is titled 'View Jovan Gerhold' and includes an 'Edit Jovan Gerhold' button. The 'Care Receiver Details' section shows a profile card for Jovan Gerhold with a circular avatar containing 'JG'. The details include: Name (Jovan Gerhold), Address (No address on provided), Email (jovan.gerhold@pastoralcare.app), Phone ((458) 728-2576), Birthday (Jul 20, 1990), Age (34), and an External Link (Planning Center Profile). Below the profile is a horizontal tab bar with options: Care (selected), Update, Tasks, Milestones, Notes, Groups, Docs, Workflows, and Activity. The 'Care' section features an 'Add Care Request' button, a search bar, and an active filter 'Exclude Closed'. A table lists care requests with columns for Care Receiver, Category, Due Date, and State. The table contains two entries for Jovan Gerhold, both for 'General Check-In' with due dates of Sep 14, 2024 (Entered) and Sep 10, 2024 (Assigned). The bottom of the table shows 'Showing 1 to 2 of 2 results' and a 'Per page' dropdown set to 10.

Seamless Care Navigation

With CareNote's intuitive Care Tabs, you can effortlessly switch between Care, Updates, Tasks, Milestones, Notes, Groups, Docs, Workflows, and Activity—all without leaving the page. This allows you to add new care entries and retrieve vital information in one streamlined interface. Whether you're assigning care requests, tracking milestones, or reviewing past interactions, everything is seamlessly integrated for a clear, organized, and efficient pastoral care workflow.

Adding a Care Request

A care request in a pastoral or caregiving context is a formal or informal solicitation for support, assistance, or attention from someone in need. This request can originate from individuals facing various challenges such as illness, grief, emotional distress, spiritual crises, or any other situation where they seek guidance, comfort, or help.

Add Care Details

Select a Care Receiver, a Due Date, the Type of care that's been requesting and select a Care Provider or Care Group to assign the request to or leave it unassigned

The screenshot shows a web browser window with the URL 'beacon.test'. The page title is 'Care Requests > Create'. The main heading is 'Create Care Requests'. Below this is a section titled 'Care Request Details' with a paragraph of instructions: 'Select the Care Receiver from your care network or add a new receiver by clicking the "+" button. Specify the Due Date for this request, and choose a Type to categorize the request. Assign the request to a Care Provider or Care Group by selecting the appropriate option. Add details in the Care Request Description field to ensure proper handling. Read the step-by-step guide for more information on how to create a care request.' The form contains the following fields: 'Care Receiver*' (a dropdown menu with 'Select an option' and a '+' button), 'Due Date: *' (a date input field with 'Mar 19, 2025'), 'Type*' (a dropdown menu with 'Select Type' and a '+' button), and 'Assign To' (a dropdown menu with 'Select an option'). Below these is a 'Care Request Description' field with a rich text editor toolbar (bold, italic, link, unlink, list, list, undo, redo) and a large text area. At the bottom of the form are three buttons: 'Create' (orange), 'Create & create another' (white), and 'Cancel' (white).

Add a Care Request Description

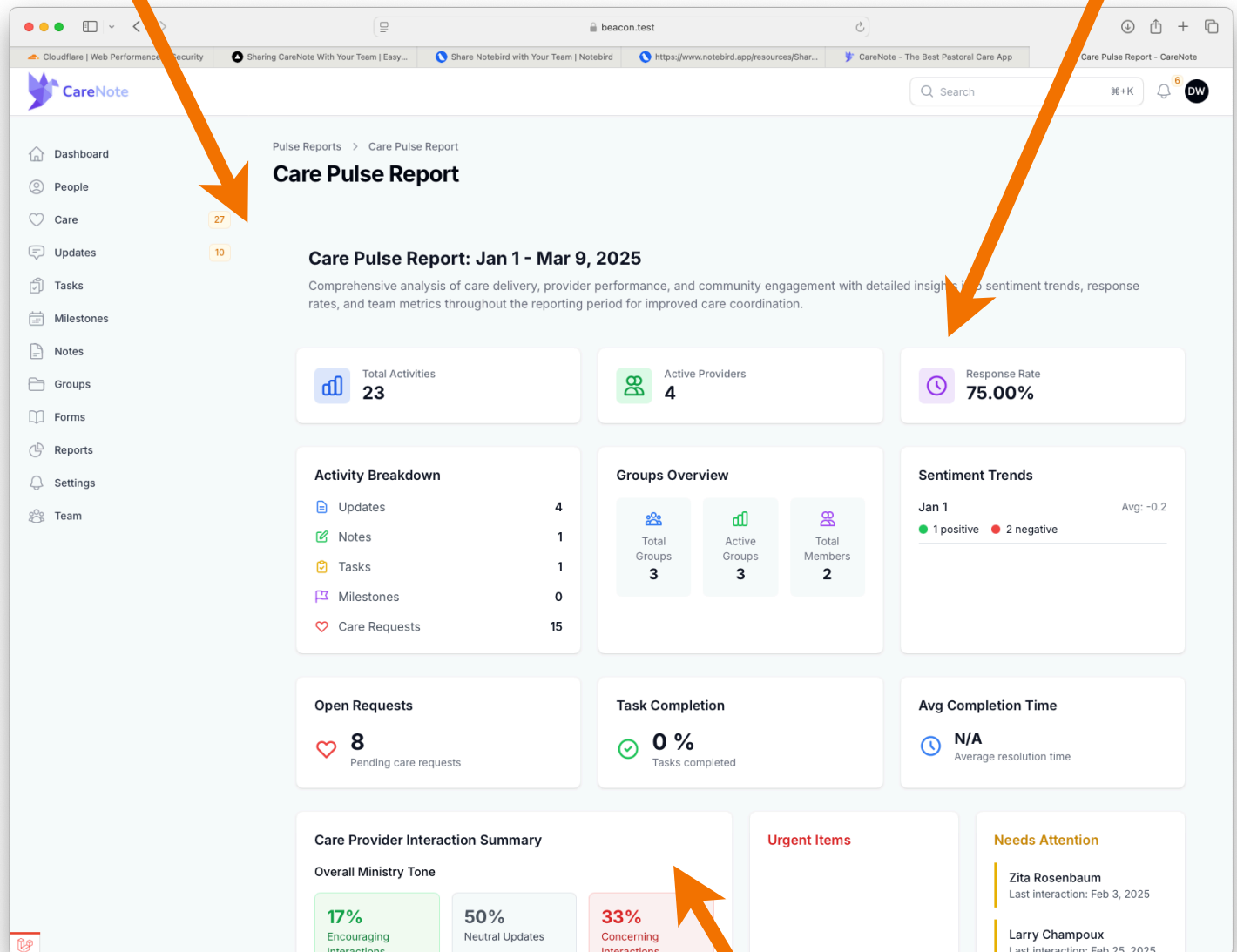
Provide a clear and concise explanation of the care needed. Include relevant details such as the nature of the request, specific concerns, any background context, and any important instructions for the Care Provider. The more context you provide, the better the care response will be.

Viewing Care Pulse Report

Comprehensive analysis of care delivery, provider performance, and community engagement with detailed insights into sentiment trends, response rates, and team metrics throughout the reporting period for improved care coordination.

Sentiment Analysis Focus

The Care Pulse Report helps church leaders ensure care needs are met with data-driven insights. The **Response Rate** tracks the percentage of care requests that receive a follow-up or acknowledgment within 24 hours, ensuring timely engagement. The **Open Care Requests** and **Task Completion Rate** provide insights into outstanding needs and progress on assigned care actions. The **Sentiment Analysis** tools help care teams assess overall ministry tone by analyzing interactions, highlighting encouraging, neutral, or concerning updates. These data-driven insights empower leaders to identify trends, prioritize urgent needs, and ensure care is both responsive and effective.



Engagement & Coordination Focus

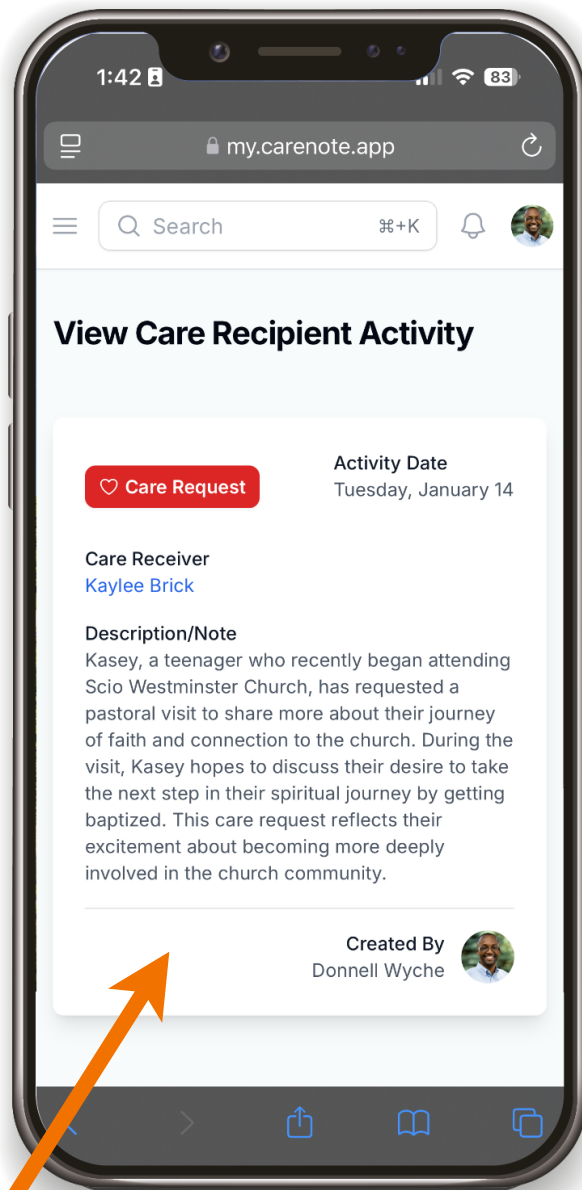
Stay ahead of pastoral care needs with real-time insights into care activities, pending requests, and care provider performance. Identify open requests, monitor sentiment trends, and ensure every congregant receives the care they need.

CareNote's Mobile First Design

Stay connected to pastoral care wherever you are. CareNote's mobile-first design ensures that all activity feed updates, tasks, and care requests are available at a glance—so you can access important data quickly. Designed for speed and simplicity, CareNote helps you stay engaged, informed, and responsive—right from your phone or tablet.

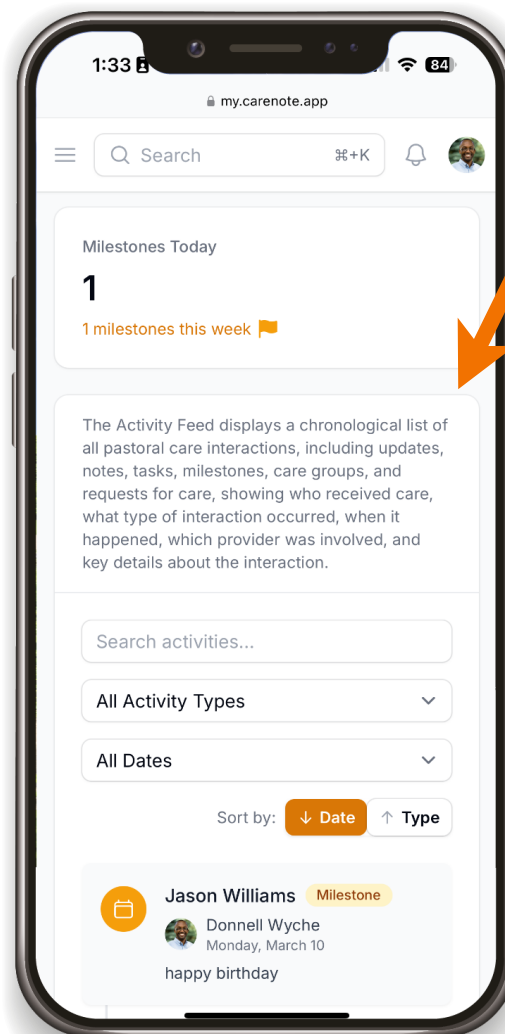
Activity Feed at a Glance

Easily scan the latest pastoral care interactions in one streamlined view. The Activity Feed provides real-time updates on care requests, notes, tasks, and group activities—keeping you informed and ensuring no care moment goes unnoticed.



Detailed Care Request View

When a care team member clicks on an activity from the feed, they see this comprehensive view displaying the care recipient, activity type, detailed description, creation information, and activity date—all organized in an intuitive interface. With just a few taps, your entire pastoral team can stay connected and responsive, whether they're in the office or on the go.





CareNote
transforming compassion into action

Your Church Deserves a Pastoral Care Tool That Does More

Most pastoral care software simply **documents care**—CareNote helps you **deliver it**.

With powerful features like **volunteer coordination, Planning Center Online (PCO) form integration, smart automations, and pastor-on-call scheduling**, CareNote ensures that no care request slips through the cracks.

Why Churches Choose CareNote

- Unlimited Volunteer Support – Equip your team with 3 free volunteers per paid user, plus affordable add-ons.
 - PCO Form Integration – Connect Planning Center forms directly to CareNote for seamless intake and follow-ups.
 - Smart Automations – Automatically assign care based on custom workflows and schedules.
 - Pastor On-Call Routing – Ensure care requests are directed to the right person at the right time.
 - Built by a Pastor, for Pastors – We understand the challenges of ministry and built CareNote to serve real churches like yours.
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Trusted by Churches Like Yours

“CareNote has been instrumental in managing over 198 congregants and handling more than 2,000 care requests, along with generating over 1,500 care reports for our Visitation Ministry over the last several years. The intuitive databases made our work so much easier. We couldn’t have managed without it!”

— Susan K., Cornerstone Church Long Beach

What’s Next? Try CareNote free for 14 days – <https://carenote.app>

 Have questions? **Call or text us at (734) 418-8434**—we’d love to help!