Privacy, Confidentiality & Care Planning Worksheet

Handling Personal Information with Care

Use this worksheet with your pastor and trusted leaders before receiving inquiries. It helps your church decide how personal information will be handled, who may access it, and how the limits of confidentiality will be explained.

1. What Information Will Be Collected?

What information will the care contact record?

□ Name
□ Preferred contact method
□ Requested support
□ Agreed next step
□ Follow-up preference

What information will not be collected unless the person chooses to share it?

□ Details of their abortion experience
□ Personal or family history
□ Health information
□ Relationship details

2. Who May Access It?

Who receives inquiries? _____
Who may access records? _____
Pastoral oversight? _____
Where will information be stored? _____

3. How Will Privacy Be Protected?

What will never be included in public prayer requests, group emails, or announcements?

_____

How will permission be obtained before sharing information with someone else?

_____

How long will information be kept, and how will it be securely removed?

_____

4. Limits of Confidentiality

What will the care contact say about privacy?

"I will not share what you tell me without your permission, except where our church's policies or applicable requirements require us to involve someone."

When may a pastor, church leader, or outside support need to be involved?

□ A request for pastoral care
□ A need for professional counseling
□ A safeguarding concern
□ An immediate safety concern
□ A requirement under church policy or applicable law

Who should be contacted in these situations?

5. Referrals

When will a referral be offered?

_____

Who maintains the referral-resource list?

_____

This worksheet supports leadership planning. It does not replace your church's approved policies, applicable requirements, or qualified professional guidance.