**Guidance on Recording of Pastoral Work**

The importance of following the Data Protection Act (DPA) is relevant to all sections of the guidance below. The Act does not necessarily prohibit the collection or disclosure of data. There is an explanation of the relevant sections of the DPA in the report *With Integrity and Skill* section 10.   
( <http://www.methodist.org.uk/downloads/Conf08_18_With_Integrity_and_Skill.pdf> )

1. **Who does the guidance apply to**

In line with the Conference report *With Integrity and Skill*, this guidance is for all pastoral workers - a term used to refer to lay, ordained, paid and voluntary people with a recognised role of care in the Church. It should be followed alongside the guidance on confidentiality.

1. **Why record pastoral visits**
2. Many pastoral visits are to those who are vulnerable, whether because of ill-health, bereavement, or other stresses in their lives. These conditions can affect whether a person becomes a risk either to themselves or to others. Accurately recording observed behaviour and statements that have relevance to assessing risk over time is an important part of being able to ensure the right level of protection and/or help is secured for the person concerned or others.
3. Maintaining appropriate boundaries in pastoral work is extremely important. Recording the information outlined below is part of a framework to protect both the person being visited and the pastoral worker. It helps inform the discussions that would need to take place in supervision or in another setting if this area raises any concerns for either party.
4. The person being visited may disclose information that is relevant to a safeguarding situation or the commission of a criminal act. Timely and accurate recording of what has been said is of the utmost importance. Recording procedures under the Safeguarding Policy will apply in the first case.
5. The person being visited may share information about their family or circumstances that it is important to remember in light of an ongoing pastoral relationship.

**c) What information should be recorded**

1. With all pastoral visits the following basic information should be recorded by all pastoral workers:

* name of person visited
* date of visit
* venue
* reason for the visit
* necessary action, if any, who it involves
* date of next visit.

Bearing in mind the points above on why record, an additional section of the record could include observations on behaviour, statements made or information shared.

**d) Where to record**

1. Information can be recorded either electronically or as a paper record. If it is recorded on a manual system it should not be in a notebook as it will be difficult to separate recording about a particular individual from other recording. An index card or similar would be suitable. Such records should be kept in a locked container.
2. records kept electronically should be filed with appropriate password and security access. The section of the guidance on confidentiality headed “Confidentiality and Technology” should be followed.