

How Families Receive Updates

Channels, owners, response windows, escalation, and the limits set by the resident's authorization

A PHONE CALL IS NEVER REPLACED BY A PORTAL MESSAGE

The portal is checked during business hours only and is never used for a significant change in condition, an injury, an emergency transport, or a death. Those are always a phone call.

GUIDE EFFECTIVE April 12, 2027	NEIGHBORHOOD Magnolia	PORTAL ACCOUNT STATUS Active for 2 contacts	RESIDENT RESTRICTIONS ON FILE Yes — see Section 3
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1. CHANNEL MATRIX — WHAT TRAVELS BY WHICH ROUTE, AND HOW FAST					
WHAT IS BEING COMMUNICATED	CHANNEL	WHO SENDS IT	WHO RECEIVES IT	RESPONSE OR DELIVERY WINDOW	NOTES
Monthly wellness summary	Portal post	Health & wellness office	Responsible party and authorized contacts	By the 5th business day of each month	Not applicable — scheduled
Weekly life enrichment photos and recap	Portal post	Life enrichment	All authorized contacts	Every Friday by 4:00 p.m.	Not applicable — scheduled
Quarterly community newsletter	Email and print	Executive director	All contacts on file	First week of Jan, Apr, Jul, Oct	Not applicable — scheduled
General question about daily life	Portal message	Resident services	Authorized contacts	Within 1 business day	Portal is not monitored overnight
Billing or statement question	Phone 1-888-555-0171	Business office	Financially responsible party only	Within 1 business day	Mon–Fri, 9:00 a.m.–4:00 p.m.
Care question that is not new or urgent	Phone 1-888-555-0173	Nurse on duty	Contacts authorized for health information	Same day if received before 3:00 p.m.	24-hour line
Routine change in condition (Level 1)	Portal note	Nurse on duty	Responsible party	Within 24 hours	Documented in the resident record
Same-day change in condition (Level 2)	Phone call	Nurse on duty	Responsible party, then contact 2	Within 4 hours of the observation	Two attempts, then voicemail
Significant change or injury (Level 3)	Phone call	Director of health & wellness	Responsible party, then contact 2, then POA	Within 30 minutes	Call sequence repeats every 15 minutes
Emergency transport or 911 activation (Level 4)	Phone call	Charge nurse and administrator on call	Responsible party and all emergency contacts	Within 15 minutes of the resident being stabilized or transported	911 is called first, always
Death of a resident	In-person or phone call	Executive director	Responsible party and POA	Immediately	Never by portal, email, or text
Community-wide emergency	Family information line 1-888-555-0178	Executive director	All contacts on file	Recorded update every 2 hours	See the emergency preparedness briefing
Service plan conference invitation	Portal and phone	Resident services	Resident and invited contacts	At least 10 calendar days before the meeting	Rescheduling is available
Grievance acknowledgment	Phone and written	Executive director	Person who filed	Acknowledged within 2 business days	Written outcome within 10 business days

Response windows are measured from the time the community receives a message or observes a change, not from the time it is sent by a family member. Windows apply to the first substantive response, which may be an acknowledgment with a stated follow-up time.

2. THE FOUR CHANGE-IN-CONDITION LEVELS

Level 1	A routine, expected variation: a skipped activity, a modest appetite change, a minor schedule change. Documented and posted to the portal within 24 hours.
Level 2	Something new that the nurse wants the family to know the same day: a new complaint, a medication order change from the prescriber, a scheduled outside appointment added. Phone call within 4 hours.
Level 3	A significant change, a fall with or without injury, a new wound, a sudden change in behavior or orientation, or any change the nurse escalates. Phone call within 30 minutes by the director of health and wellness.
Level 4	Emergency services activated or the resident is transported. 911 is called first. The family call follows within 15 minutes of stabilization or transport, and every emergency contact is attempted.

The level is assigned by the nurse using clinical judgment and the community's policy. A family member may ask why a level was assigned, and the answer is documented.

3. WHAT CAN BE SHARED, AND WITH WHOM

The resident decides who receives information about her. The authorization form BC-COM-04 records three separate permissions, and a contact may hold one without the others.

- **Health information:** assessments, changes in condition, medications, appointments, and clinical records.
- **Financial information:** statements, balances, payment history, and any fee change notice.
- **Well-being and activity information:** participation, photographs, dining, and general presence in the community.

When a caller is not authorized: If a caller is not listed for a category, staff will say that they cannot confirm or deny information in that category and will offer to take a message for the responsible party. This is not a judgment about the caller and it is not negotiable at the front desk.

4. AUTHORIZED CONTACTS ON FILE FOR APARTMENT 214

CONTACT ROLE	NAME	RELATIONSHIP	HEALTH INFO	FINANCIAL INFO	ACTIVITY INFO	POSITION IN THE CALL ORDER
Responsible party	Claire Whitfield-Oyelaran	Daughter	Yes	Yes	Yes	Primary for all levels
Emergency contact 2	Daniel Whitfield	Son	Yes	No	Yes	Called if contact 1 is unreachable
Healthcare power of attorney	Claire Whitfield-Oyelaran	Daughter	Yes	Yes	Yes	Document on file, executed 2024
Financial power of attorney	Not designated	—	No	No	No	No document on file
Additional contact	Rev. Marion Teague	Clergy	No	No	No	Visits and general well-being only
Additional contact	Alice Whitfield-Nam	Granddaughter	No	No	Yes	Activity updates only, at the resident's request

The resident may add, remove, or restrict any contact at any time, in writing or verbally to the resident services coordinator with a same-day written confirmation. A change takes effect when it is entered in the record, and the previously authorized contact is not notified of the change unless the resident asks for that.

5. ESCALATION PATH WHEN A RESPONSE WINDOW IS MISSED

STEP	WHO TO CONTACT	HOW	RESPONSE COMMITMENT	IF STILL UNRESOLVED
1	Front desk	1-888-555-0170 or in person	Same day	Ask for the neighborhood coordinator by name
2	Tomás Iglesias, resident services coordinator	1-888-555-0172 or portal message	1 business day	Ask for the director of health and wellness
3	Priya Raghunathan, RN, director of health & wellness	1-888-555-0173	1 business day	Ask for the executive director
4	Marcus Delaney, executive director	1-888-555-0176 or in person	2 business days	File a written grievance, form BC-GRV-02
5	Regional director of operations	Contact information posted in the main lobby	3 business days	State survey agency contact information is posted in the main lobby

Escalating does not restart the original request. The person at each step is expected to answer the original question and explain what happened to it.

6. PRACTICAL EXPECTATIONS

1. Call the nurse line, not the front desk, for anything about health. The front desk cannot read from the clinical record.
2. Quiet hours run from 9:00 p.m. to 7:00 a.m. Non-urgent calls to the apartment are discouraged during those hours; calls to staff about an urgent concern are always welcome.
3. Ask for a call-back window rather than a call-back promise. Staff will name a window and meet it or tell you why it moved.
4. One family spokesperson keeps the record clean. When several relatives call separately about the same question, answers drift.
5. Interpretation and TTY services are available at no cost. Ask the front desk or call 1-888-555-0170.
6. Photographs are posted only for residents who have consented in writing, and consent can be withdrawn at any time.

7. WHAT THIS PROGRAM DOES NOT DO

- It does not monitor the portal overnight, on weekends, or on holidays.
- It does not give a clinical opinion, a diagnosis, or a prognosis by message. Those conversations happen with the nurse or the resident's own prescriber.
- It does not share information with a contact the resident has not authorized, including a close relative.
- It does not replace the resident's own voice. Where the resident can speak for herself, staff will direct the question back to her.
- It does not guarantee that every family member hears the same news at the same moment. The call order in Section 4 controls.

Emergency exception: During a community-wide emergency, individual calls and portal messages are suspended and all information moves to the family information line at 1-888-555-0178, which is updated with a recorded message every two hours.

8. ACKNOWLEDGMENT AND AUTHORIZATION REVIEW

Signing records that this guide and the current authorization were reviewed together. The authorization itself is form BC-COM-04; this page does not change it.

SIGNATURE	PRINTED NAME	ROLE	DATE
	Eleanor R. Whitfield	Resident	
	Claire Whitfield-Oyelaran	Responsible party	
	Tomás Iglesias	Resident services coordinator	

FICTIONAL SPECIMEN. Brookmere Commons Senior Living, the resident, the family contacts, the staff names, the form numbers, the phone numbers, the portal, and every response window shown here are invented for demonstration only. This document is not a privacy notice, an authorization to disclose information, a consent form, a grievance policy, or a statement of resident rights for any real community, and it must not be used in place of one.