

A PRODUCT TOUR

The Family Communication OS

Twelve family conversations. One operating system.

Every week, your staff handles the same twelve family conversations — the daily update, the incident call, the billing question, the hospital return, the transition to hospice. This tour walks through each one: what your staff dictates in a sentence, the polished message the family receives, and the audit-ready documentation the state surveyor asks for. Same workflow, every time.



SKILL 01

CORE • \$247/MO

Family Update Studio

The weekly update, dictated in 60 seconds.

WHAT STAFF DICTATED

"Mrs. Peterson had a great day today, ate all her lunch, played bingo with the ladies and won a round, spirits are up, family should be happy."

FAMILY-FACING • BRAND VOICE

Dear Peterson family,

We wanted to share a lovely note from Margaret's day today. She joined the ladies for bingo this afternoon and, to everyone's delight, won a round. She was in wonderful spirits throughout and enjoyed her full lunch.

These are the moments we live for. Thank you for trusting us with her care.

Warmly,
The Willow Creek Care Team
Operational Excellence™

INTERNAL • AUDIT-READY

PROGRESS NOTE — Peterson, Margaret

Date: 07/08/2026

Staff: J. Rivera, CNA

Type: Routine daily update

Observation: Participated in group bingo activity (2:00 PM). Alert, engaged, positive affect. Meal intake: 100% lunch. No incidents. Family communication generated for admin approval.



SKILL 02

CORE • \$247/MO

SafeChange • Incident Notifications

The message you're scared to send — sent right, every time.

WHAT STAFF DICTATED

"Mr. Chen fell in the bathroom around 3pm, no injuries, we checked him over, he's fine but I need to tell the family."

FAMILY-FACING • BRAND VOICE

Dear Chen family,

We're writing to let you know that this afternoon at approximately 3:00 PM, your father experienced a fall in his bathroom. Our team responded immediately. He was fully assessed by our nursing staff on-site — thankfully, no injuries were sustained, and he is resting comfortably.

We have already reviewed the circumstances and adjusted his care plan to reduce the risk of recurrence. A member of our team will call you personally this evening to walk you through the details.

With care,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

INCIDENT DOCUMENTATION — Chen, Robert

Date/Time: 07/08/2026 • 15:07

Location: Resident bathroom, Room 214

Type: Unwitnessed fall, no injury

Assessment: Full head-to-toe by RN on-site

Injuries: None observed

Interventions: Repositioning, hydration offered, care plan updated

Family notified: Yes (email + scheduled call)

Admin approval: [PENDING]



SKILL 03

CORE • \$247/MO

Today at Facility • Inbound Questions

"How's mom doing today?" — answered in your voice.

WHAT STAFF DICTATED

"Sarah's daughter texted asking if she took her afternoon meds and how she seemed today, tell her yes and she was cheerful."

FAMILY-FACING • BRAND VOICE

Hi Jennifer,

Thanks for checking in. Yes — your mother received her afternoon medications on schedule at 2:00 PM. She was in cheerful spirits when we saw her; she spent some time in the garden this afternoon and had a nice conversation with our activities coordinator.

Please reach out any time. We're always glad to hear from you.

Warmly,
The Willow Creek Care Team
Operational Excellence™

INTERNAL • AUDIT-READY

INBOUND FAMILY QUESTION — Classified

Resident: Miller, Sarah

Requester: Jennifer Miller (daughter, authorized contact)

Classification: Routine wellness inquiry

Context pulled: Med admin log (2:00 PM), activity log (garden 3:15 PM)

Callback needed: No — resolved by email

Logged to Communication Log: Yes



SKILL 04

CORE • \$247/MO

Care Plan Change

When the doctor changes something — the family hears it right.

WHAT STAFF DICTATED

"Doctor ordered a diet change for Mr. Thompson, moving to a soft mechanical diet, need to tell his daughter and get her okay."

FAMILY-FACING • BRAND VOICE

Dear Karen,

Dr. Alvarez examined your father this morning and has updated his care plan. Moving forward, William will be transitioning to a soft mechanical diet — this simply means his meals will be prepared in a texture that's easier for him to enjoy and swallow safely.

Our culinary team will make sure his favorites are still on the menu, just prepared a little differently. Please call me any time if you have questions, and we'd love to talk through it together before the change begins tomorrow.

With care,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

CARE PLAN CHANGE — Thompson, William

Date: 07/08/2026

Ordered by: Dr. Alvarez, PCP

Change type: Diet modification — regular → soft mechanical

Rationale: Documented swallow difficulty, PCP visit today

Effective: 07/09/2026 (next meal service)

Family contact: Karen Thompson (daughter, POA)

Communication sent for admin approval

Care plan updated in EMR



SKILL 05

CORE • \$247/MO

Staffing Change

New face on the schedule — introduced before they walk in.

WHAT STAFF DICTATED

"New aide Maria starting tomorrow on the weekend shift for James, tell the family so they know who to expect."

FAMILY-FACING • BRAND VOICE

Dear Michael,

A quick note to introduce a new member of our team. Starting this Saturday, Maria Sanchez will be covering the weekend day shift for your father. Maria has been with us for two years on our weekday team and knows James well from covering here before — he already recognizes her and enjoys her company.

We wanted you to know before her first shift so there are no surprises. Please reach out any time.

Warmly,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

STAFFING CHANGE NOTIFICATION — Thompson, James
Effective: Saturday 07/11/2026

Role: Weekend day shift CNA

New staff: Maria Sanchez (2-year tenure, cross-trained)

Reason: Prior staff moved to weekday-only schedule

Family notified: Michael Thompson (son)

Continuity notes: Maria has previously covered this resident; established rapport

Communication log: Sent by admin



SKILL 06

PLUS • \$497/MO

Family Welcome Pathway

The first 30 days a new family experiences you.

WHAT STAFF DICTATED

"New admission tomorrow, William Hayes, daughter is Karen, room 108, start the welcome sequence."

FAMILY-FACING • BRAND VOICE

Dear Karen,

Welcome to the Willow Creek family. We are honored that you've trusted us with your father's care. William arrived safely this morning, and our team is already getting to know his preferences and routines.

Over the coming weeks, you'll hear from us regularly as he settles in — a note on day three, again at two weeks, and a milestone check-in at one month. Please save our number and reach out any time with questions.

With warmth,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

WELCOME PATHWAY QUEUED — Hayes, William (Room 108)

Day 1: Welcome email ✓ drafted, awaiting admin approval

Day 3: Settling-in note · scheduled

Week 2: Two-week check-in · scheduled

Month 1: 30-day milestone review · scheduled

Orientation one-pager + FAQ answers · attached

Primary contact: Karen Hayes



SKILL 07

PLUS • \$497/MO

Billing Communication

Money conversations handled with grace, not friction.

WHAT STAFF DICTATED

"Mrs. Nguyen's card was declined for this month's invoice, her son is on file, need to reach out gently and give her options."

FAMILY-FACING • BRAND VOICE

Dear David,

A quick and private note about this month's billing. When we processed the July invoice for your mother's care, the payment on file was declined by the bank — this often happens with new cards, expired dates, or a temporary hold, and it's easily fixed.

Whenever it's convenient, please reach out to our billing office at (555) 123-4567 or reply to this email, and we'll walk through the options. There is no urgency and no impact on her care — we simply wanted to let you know directly.

With care,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

BILLING COMMUNICATION — Nguyen, Anh

Invoice: July 2026 • \$6,240.00

Event: Payment declined (auto-charge, card on file)

Contact: David Nguyen (son, financial POA)

Communication tone: Gentle, no pressure, options-focused

Internal follow-up: Billing office to expect inbound call

Care impact: None — resident care continues uninterrupted

Admin approval: [PENDING]



SKILL 08

PLUS • \$497/MO

Post-Hospital Return

The critical 72 hours after they come back.

WHAT STAFF DICTATED

"Mrs. Peterson back from the hospital this afternoon, family really worried, need to reassure them and share the plan."

FAMILY-FACING • BRAND VOICE

Dear Peterson family,

Margaret is back home with us this afternoon. She arrived safely at 2:30 PM, has been settled into her room, and our nursing team completed a full return assessment. She is comfortable, resting, and glad to be back in her own bed.

Over the next 72 hours we will be watching her closely — vitals every four hours, medication reconciliation with her discharge summary, and increased staff check-ins. If anything changes we will call you immediately. In the meantime, please feel welcome to visit or call any time.

With care,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

POST-HOSPITAL RETURN — Peterson, Margaret
Return: 07/08/2026 • 14:30 (from St. Luke's Medical, 3-day stay)
Return assessment: Completed by C. Nguyen, RN
Med reconciliation: Discharge summary vs. current MAR • IN PROGRESS

72-hour monitoring: Vitals q4h • staff check-ins q2h • doctor follow-up scheduled 07/10

Family notified: Yes (email; primary contact confirmed by phone)
Risk flags: Fall risk elevated post-hospitalization — bed alarm active

Admin approval: [PENDING]



SKILL 09

PLUS • \$497/MO

Family Voice Monitor

Know how families feel — before the survey tells you.

WHAT STAFF DICTATED

"Got an email from the Nguyen family, they said they're disappointed we didn't call after the schedule change, they're frustrated."

FAMILY-FACING OUTPUT

None.

Voice Monitor is 100% internal — it categorizes family sentiment and prepares talking points, so you know what's escalating before you write back.

INTERNAL • AUDIT-READY

CATEGORIZED FEEDBACK — Nguyen family

Category: Mild concern

Feedback: "Disappointed we didn't call after the schedule change. Frustrated."

Suggested handling: Acknowledge within 24 hours. Log resolution.

SUGGESTED FOLLOW-UP TASKS

1. Administrator sends personal acknowledgement today.
2. Log outcome in Communication Log.
3. Identify one process fix (schedule-change notification) and assign owner.

MONTHLY THEMES: Add to rollup. Watch for recurring "communication frequency" themes.



SKILL 10

PLUS • \$497/MO

Transition Conversations

The hardest conversations — with a script in your hand.

WHAT STAFF DICTATED

"Mr. Anderson placed on hospice today, need to prepare a family meeting for tomorrow, all three adult kids will be there."

FAMILY-FACING • BRAND VOICE

Dear Anderson family,

We would like to meet with you tomorrow to walk through your father's care together. Dr. Alvarez met with our team today and, in partnership with you, has recommended that Robert transition to hospice care. This decision honors what Robert has told us he wants — comfort, dignity, and family close by.

We've reserved our family conference room for 2:00 PM tomorrow. Chaplain services will be available. Please bring any questions you'd like to talk through. This is your time.

With deep care,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

TRANSITION MEETING PREP — Anderson, Robert
Meeting: 07/09/2026 • 2:00 PM • Family Conference Room
Attendees: Three adult children • Administrator • Charge Nurse • Chaplain (on request)

CALL SCRIPT (opening)

"Thank you all for being here today. We wanted to sit down together because your father's care is changing, and we want to make sure you have the space and time to hear everything from us in one room..."

Agenda: Medical picture • Comfort care plan • Family role • Chaplain support • Questions
Documents prepared: Hospice election form • Comfort care plan draft • Family FAQ handout



SKILL 11

PLUS • \$497/MO

Grievance Response

Formal complaints — regulatory deadlines tracked automatically.

WHAT STAFF DICTATED

"Formal complaint filed by the Wilson family, said they're going to their lawyer, need to respond today."

FAMILY-FACING • BRAND VOICE

Dear Wilson family,

I have received your formal complaint regarding your mother's care and I want you to know that it has my full and immediate attention. This is an official acknowledgement that we have opened a formal grievance file and will be following our published grievance procedure.

You can expect a written response from me within three (3) business days outlining the specific steps we are taking to investigate, and a full written resolution within thirty (30) days. In the interim, I am personally available for a phone call at your convenience.

With seriousness and care,
The Willow Creek Administrator
Operational Excellence™

INTERNAL • AUDIT-READY

GRIEVANCE FILE OPENED — Wilson family
Date opened: 07/08/2026 • 6:23 PM
Category: Formal • legal counsel referenced
Regulatory deadlines (auto-tracked)
• 3-BUSINESS-DAY WRITTEN ACKNOWLEDGEMENT due: 07/13/2026
• 30-DAY WRITTEN RESOLUTION due: 08/07/2026
Actions taken
• Grievance log entry created
• State-mandated grievance procedure attached
• Investigation checklist assigned to Administrator
• Legal counsel flagged for review before written response
Admin approval: [PENDING]



SKILL 12

PLUS • \$497/MO

Family Learning Hub

The education families ask for — before they ask.

WHAT STAFF DICTATED

"This month I want to educate families on sundowning, we get a lot of questions about it."

FAMILY-FACING • BRAND VOICE

Subject: A little about sundowning

Dear family,

This month we're sharing helpful information about a topic many families ask us about: sundowning. Understanding it can make your visits and calls even more meaningful. Over the next couple of weeks we'll send a few short, friendly notes — signs to look for, how our team supports your loved one every day, and simple ways you can help too.

With care,
The Willow Creek Care Team
Operational Excellence™

INTERNAL • AUDIT-READY

LEARNING TRACK PREPARED — "Sundowning"

Deliverables: Micro-lesson + 3-part drip email sequence

Audience: All active family contacts (opt-out available)

Drip 1: Introduction · Drip 2: What to look for · Drip 3: How families can help

FAQ tracking note: enabled — themes routed back to admin monthly

Admin approval: [PENDING]

TWO WAYS TO OPERATE

Pick the tier. Start the operation.

No lock-in. Yours forever.

CORE

\$247 / mo

Family Update Studio
SafeChange — Incidents
Today at Facility — Inbound Q
Care Plan Change
Staffing Change

The five conversations every agency has every week
— dictated, drafted, admin-approved, sent.

PLUS • RECOMMENDED

\$497 / mo

Everything in Core, plus:

Welcome Pathway
Billing Communication
Post-Hospital Return
Family Voice Monitor
Transition Conversations
Grievance Response
Family Learning Hub

The full operating layer — onboarding, billing, transitions,
and early warning on families about to escalate.

We do not consult. We operate.