CareNest HQ™

Family Care Coordination Worksheet

The Care Coordination Operating System, the four-layer system expert families install before week one.

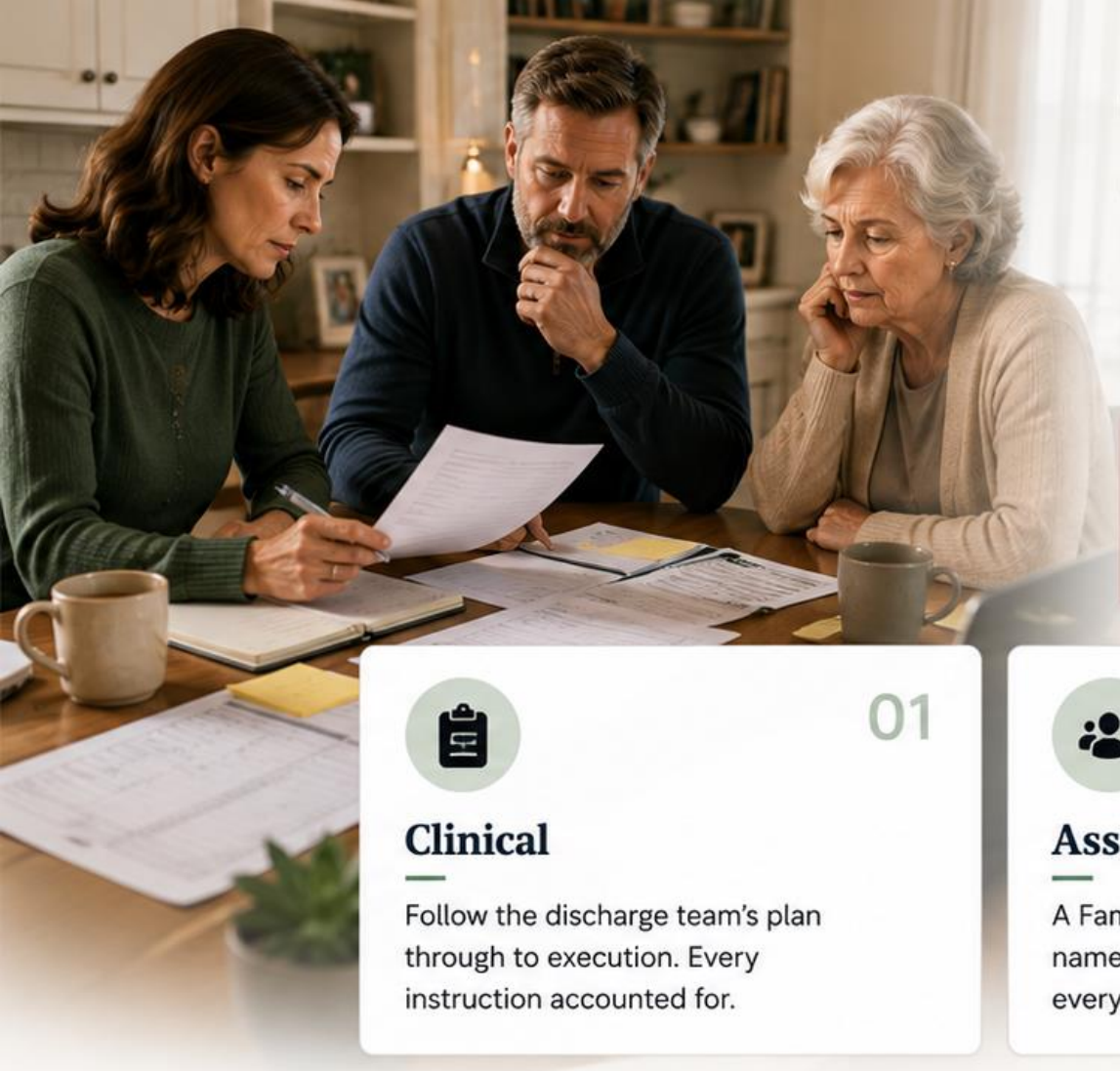
01 FOUNDATION

02 ASSIGNMENT

03 COMMUNICATION

04 ACCOUNTABILITY

05 RHYTHM



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LAYER 01 · FOUNDATION

The Care Coordination Operating System™

THE MOMENT

Three siblings, three assumptions about who is calling the doctor.
By day three, nobody has actually called.

01

Clinical

Follow the discharge team's plan through to execution. Every instruction accounted for.

02

Assignment

A Family Responsibility Matrix that names an owner and a backup for every task.

03

Communication

A Family Command Center with one rhythm and one channel, not a group text.

EXPERT INSIGHT

Families fail when care is treated as heroics instead of operations.
The Care Coordination Operating System turns love into assigned deliverables.

DIAGNOSIS

Why Families Fail

Three recurring patterns show up before any system is in place.

Assumed Ownership

"Someone should call the doctor."

Message Chaos

Too many group texts, no record.

Week-One Drift

"We were organized, then..."

None of these are personal failures. Each is a missing system, and each has a specific fix.

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WORKED EXAMPLE

The Martinez Family

How one family assigned first-week ownership using the Operating System.

PERSON	ROLE	FIRST-WEEK DELIVERABLE
R Rebecca	Local lead	Meds, rides, home health at door
M Mike	Remote ops	Specialist scheduling + insurance calls
S Susan	Comms lead	Friday written update to all siblings

Three names.
Three roles.
Three deliverables.

That is the entire first-week plan, nothing left to interpretation, nothing left assumed.

IMPLEMENTATION

Install Sequence

Expert families run this exact timeline in the first week.

1

DISCHARGE DAY

Read CCOS layers aloud on the family call

Susan

2

DAY 1

Complete the Responsibility Matrix

All siblings

3

DAY 2

Activate Command Center rules

Susan + Rebecca

4

DAY 7

First Weekly Care Operations Review

Susan leads

FILL IN YOUR OWN INSTALL SEQUENCE BELOW.

Discharge-day call date: _____

Day 1 review owner: _____

Day 7 first stand-up: _____

LAYER 02 · ASSIGNMENT

Family Responsibility Matrix

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THE MOMENT Every sibling assumed someone else handled cardiology.
This makes invisible gaps visible before they become crises.

R **Rebecca**
LOCAL LEAD

Meds, rides,
home health at door

M **Mike**
REMOTE OPS

Specialist, insurance,
pharmacy

S **Susan**
COMMS LEAD

Friday written
family update

Every role has a name attached.
No task belongs to "whoever gets to it."

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Ownership Heat Map

Primary, backup, observer, and gap, mapped across every care category.

CARE CATEGORY	Rebecca	Mike	Susan
Medications Refills, schedules, changes	OWNER	BACKUP	VIEW
Appointments Scheduling, reminders, follow-ups	OWNER	GAP	VIEW
Insurance Coverage, claims, approvals	VIEW	OWNER	BACKUP
Transportation Rides, parking, logistics	OWNER	BACKUP	VIEW
Communication Updates, messaging, calls	VIEW	BACKUP	OWNER
Emergency Plans, contacts, readiness	OWNER	BACKUP	VIEW
Documentation Records, forms, paperwork	VIEW	OWNER	BACKUP
Legal POA, directives, compliance	VIEW	VIEW	OWNER

LEGEND

Primary / Owner
Takes the lead and is accountable

Backup
Steps in when needed

Observer / View
Informed and can assist

Gap
No one owns this yet

INSIGHT

A visible gap is a solvable problem waiting on a name. Named ownership, not a shared spreadsheet, is what closes it.

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Ownership Gaps & Coordination Hierarchy

Close the gaps. Then define who acts, who calls, and who broadcasts.

OWNERSHIP GAPS + RISK

No backup for meds, burnout risk.
Name Mike as backup

Insurance unassigned, prior auth delays
Mike owns by day 2

Legal observer only, POA stalled
Susan confirms POA access

COORDINATION HIERARCHY

LEVEL 1	**Rebecca**	Acts as operations lead
LEVEL 2	**Mike**	Calls specialist, office
LEVEL 3	**Susan**	Broadcasts to all siblings

EXPERT INSIGHT

A visible gap is a solved problem waiting on a name.
An invisible gap is the next crisis.

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Family Command Center

One weekly rhythm, one channel, one escalation owner, not a group text.

THE MOMENT Three siblings, three group chats, and nobody sure which one has the real update. The Command Center ends the chaos.

ELEMENT	EXPERT STANDARD	MARTINEZ EXAMPLE
Update cadence	Weekly video + urgent-only texts	Fridays 6pm PT, siblings only
Primary channel	One non-urgent thread	Oheron-umail + calendar
Escalation owner	Names who broadcasts urgent news	Susan broadcasts, Rebecca acts
Decision hierarchy	Clinical team wins disputes	Discharge plan read on call

DECISION AUTHORITY

Medical execution	Clinical team, follows discharge plan
Financial / insurance	Mike, business hours calls
Housing / home	Rebecca, local changes only
Emergency	Rebecca + Mike, 911 first, Susan broadcasts

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Communication Model & Anti-Patterns

Match the message to the channel, and retire the habits that don't scale.

THE RIGHT MESSAGE, RIGHT CHANNEL

Message Type		Channel	Cadence
Emergency	Time-sensitive or safety-critical updates	Phone + urgent text	Immediate
Clinical questions	Non-urgent medical or care questions	Video with local lead	Weekly Sunday 4pm
Scheduling	Visits, appointments, or task scheduling	Shared task list	Within 24h of booking
Family updates	Non-urgent updates and progress	Written summary	Weekly Friday

EXPERT INSIGHT

A command center is not a group text.
It is a weekly rhythm,
one non-urgent channel, and a pre-assigned escalation owner.

Message Type	Channel	Cadence
Emergency	Phone + urgent text	Immediate
Clinical questions	Video with local lead	Weekly Sunday 4pm
Scheduling	Shared task list	Within 24h of booking
Family updates	Written summary	Weekly Friday

ANTI-PATTERNS TO RETIRE

Daily check-ins, no tasks

Replace: weekly video + written update

Side texts on clinical calls

Replace: Sunday call with local lead

Debating meds in group chat

Replace: follow discharge plan, escalate to PCP

WHY IT WORKS

- Reduces noise and decision fatigue
- Keeps info where it belongs
- Empowers local lead and care team
- Creates a reliable weekly rhythm

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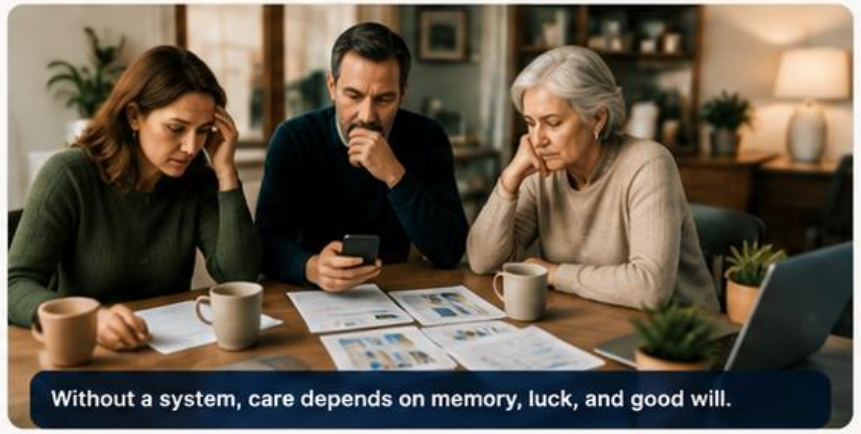
Caregiver Failure Model

Most breakdowns aren't caused by bad intentions.
They happen when ***the system is set up to fail.***

THE MOMENT Retires answering texts. Mike calls daily but owns nothing. Susan hears the news last.
None of them are the problem. The missing system is.


Without a system, care depends on memory, luck, and good will.

THE THREE FAILURE PATTERNS

01 Switchboard Trap
Daily calls, zero owned tasks, lots of noise.
RESULT: Nothing gets done

02 Hero Local
One sibling holds all the physical load.
RESULT: Burnout & resentment

03 Silent Third
Side texts, sibling last to know.
RESULT: Missed updates

WHY IT MATTERS

Care is too important to rely on memory, goodwill, and luck. A system turns chaos into clarity and accountability.

PREVENTION SYSTEMS THAT BREAK THE PATTERNS

System	Prevents	Owner
Assignment grid	Assumption gaps	Susan facilitates week 1
Weekly stand-up	Hero local burnout	Susan leads Sunday call
Escalation chain	Panic debates	Rebecca + Mike pre-assign
Written updates	Silent third pattern	Susan every Friday

THE GOAL

Create a repeatable rhythm where everyone knows their role, shares updates, and gets ahead of problems—together.

> ***A system that depends on one person will fail when that person can't keep it all together.***

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Pattern Diagnosis & Escalation Review

Which sounds like your family? Match the pattern to the fix.

THIS WEEK WE SEE...	PATTERN	FRAMEWORK TO ACTIVATE
Mike calls daily, owns nothing He calls to check in, but no tasks are owned.	**Switchboard Trap** One person becomes the go-to, but not the doer.	**Family Responsibility Matrix** Assign ownership so calls come from clarity, not confusion.
Rebecca stops answering texts Texts go unanswered and follow-ups stall.	**Hero Local** One person carries too much and burns out.	**Weekly Care Operations Review** Create a weekly rhythm to surface and solve issues early.
Siblings learn news from neighbors Information is scattered and not shared.	**Silent Third** Someone is left out and misses critical updates.	**Family Command Center** One source of truth keeps everyone in the loop.

ESCALATION REVIEW • MARTINEZ EXAMPLE

	What happened:	Escalation:	Fix to activate:	
FALL / INJURY High impact	Rebecca on scene	Susan texts siblings	Family Command Center for real-time alerts	ACT NOW
MISSED MEDS X2 Medium impact	Mike calls Rebecca	Susan if no response in 4h	Weekly Care Operations Review to close the gap	ACTIVE
NEW SYMPTOM Low–Medium impact	Rebecca to PCP line	Susan summarizes for family	Family Responsibility Matrix to assign follow-up	MONITOR

Diagnose the pattern before blaming the person.
Each failure mode maps to a specific framework fix.

HOW TO USE THIS PAGE

- Identify the pattern your family is stuck in.
- Pick the right framework to fix it.
- Run the escalation example and practice the handoff.

EXPERT INSIGHT

Escalation isn't about blame—it's about having a plan when things go sideways.

> A system that reacts builds stress.
> A system that escalates builds trust.

LAYER 05 · RHYTHM

Weekly Care Operations Review™

A repeatable rhythm. A visible scorecard. A family that stays aligned.

THE MOMENT Friday 6pm. Thirty minutes that prevent a week of confusion.

TODAY'S AGENDA

1. **Wins & What Changed** — 5 min
2. **Medications Review** — 5 min
3. **Appointments & Tasks** — 5 min
4. **Caregiver Load Check** — 5 min
5. **Risks & Escalations** — 5 min
6. **Plan for Next Week** — 5 min

NEXT REVIEW
Friday, May 24 • 6:00 PM PT

WEEKLY HEALTH SCORECARD

Medications	On Track	95%
Appointments	On Track	09
Caregiver Load	At Risk	62%
Insurance / Auth	On Track	90%
Emergency Ready	On Track	100%

CAREGIVER LOAD

Elevated

Monitor this week
Consider support

NEXT KEY APPOINTMENT

May 22

Cardiology Follow-up
10:00 AM

TOP PRIORITY

Insurance

Prior auth for home health

RISKS & ESCALATIONS

High caregiver load trend
Watch for fatigue and scheduling conflict

Insurance authorization
Follow up by May 20 to avoid delay in services

DECISIONS MADE

- Approved home health schedule
- Mike to call insurance on Monday
- Susan to send summary email tonight

WHO'S DOING WHAT NEXT WEEK

R	Rebecca	Transportation plan for 5/22 appointment
M	Mike	Insurance call + update referral status
S	Susan	Friday summary + appointment prep

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Weekly Operating Cadence

Week one clarity decays without a stand-up.

Run the same review every week until it becomes habit.

> *The families who do this weekly don't just react less—they prevent more.*
>
> *– Care Coordination Insight*

A weekly rhythm turns coordination into a habit.

SUNDAY STAND-UP
Plan the week

ESCALATION REVIEW
Solve what's slipping

FRIDAY UPDATE
Close the loop

1 — *Susan leads*

2 — *Rebecca + Mike*

3 — *Susan*

WEEKLY NARRATIVE UPDATE

Week of:	July 7 – July 13, 2025
Top priority:	Confirm cardiology callback
Blocker:	Prior auth pending, day 3
Next review:	Sunday 4pm video

WHY THIS WORKS

- Creates a reliable rhythm for your care team
- Catches small issues before they become crises
- Builds accountability without blame
- Gives everyone confidence in the plan

CADENCE HEALTH SCORE

Rate your weekly rhythm

Consistency	Participation	Follow-through	Documentation
4 /5	**4** /5	**3** /5	**4** /5
Do you run the 3 reviews weekly?	Is everyone engaged?	Are action items completed?	Is the plan updated?

YOUR SCORE: 15 / 20

Great start! Keep the cadence going to build unstoppable clarity.

EXPERT INSIGHT

Rhythm reduces stress by replacing reaction with routine. Families that keep the cadence ***protect their loved one and each other.***

PRO TIP Put the 3 weekly touchpoints on the calendar. Protect the time like any medical appointment.

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KEEP THE SYSTEM ALIVE AS CARE CHANGES

Run This Operating System in CareNestHQ

The Family Responsibility Matrix and Command Center don't stay static. CareNestHQ keeps ownership, medications, appointments, and updates current as care evolves.

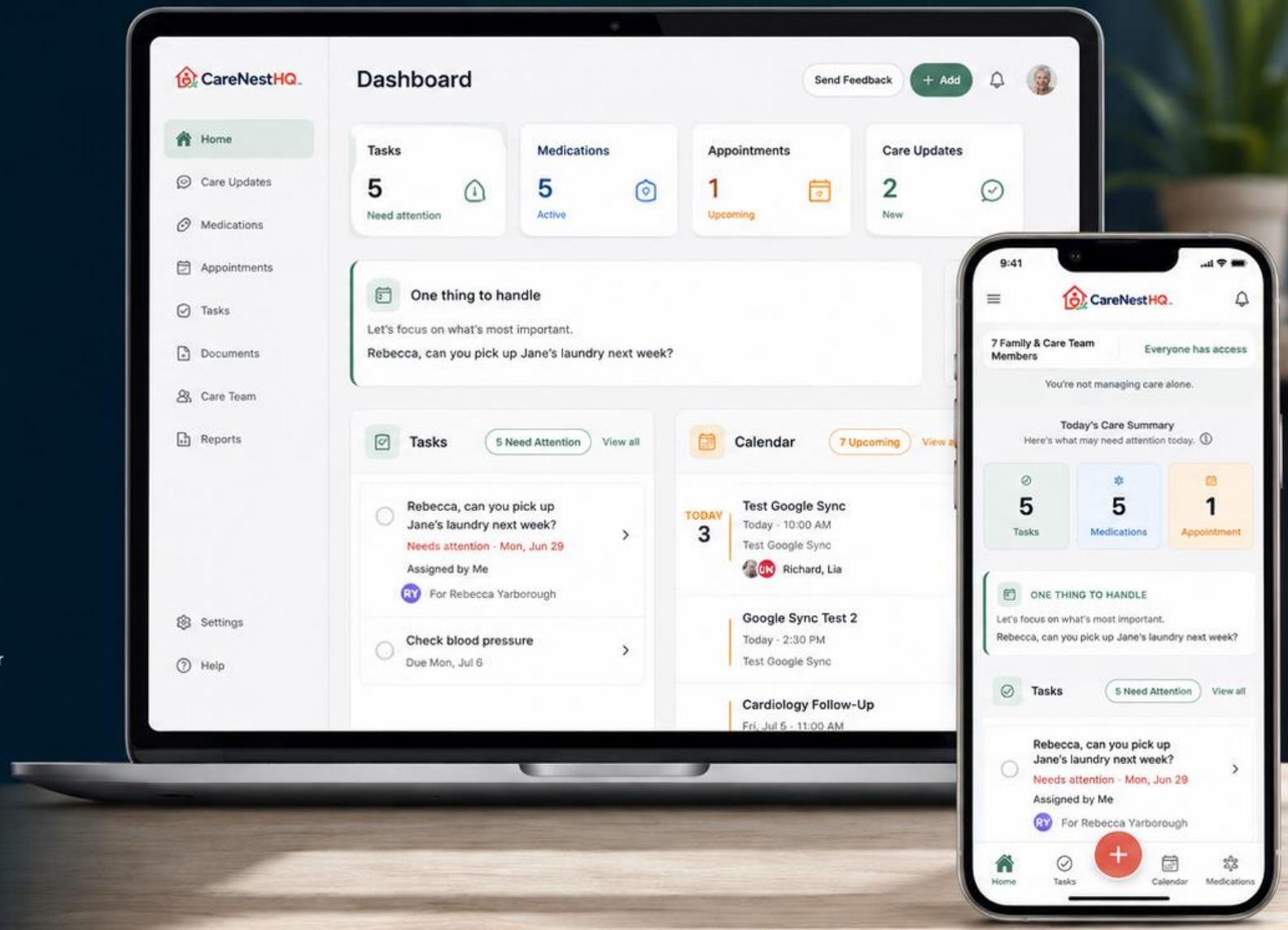
Reduce Missed Tasks
Everyone sees what needs attention.

Stay Ready for Appointments
Schedules, prep, and follow-ups in one place.

Communicate Clearly
Right info, right people, right time.

Share the Load
Work together without the chaos.

Start Coordinating Care →

CareNestHQ.com | Care Coordination Operating System

Everything your family needs. All in one place.