

# CORE PROCESS

## Client & Family Communication

### PURPOSE

To ensure clients and families are informed, engaged, and confident in the care experience through clear, proactive, and responsive communication.



01

### INTAKE COMMUNICATION

*Owner: Intake Coordinator*

- Explain services, onboarding steps, and what to expect in plain language.
- Share how and when the organization will communicate (phone, email, portal, etc.).
- Confirm key contacts on both sides and preferred communication methods.
- Answer initial questions and document any special concerns or preferences.



02

### ONGOING UPDATES

*Owner: Case Manager / Supervisor*

- Agree on update frequency and format based on client and family preferences.
- Provide regular summaries of progress, changes in condition, and key care events.
- Escalate clinical or safety concerns promptly to the right providers and family contacts.
- Document all significant updates and decisions in the client record.



03

## FEEDBACK & SURVEYS

*Owner: Client Experience Manager*

- Send satisfaction surveys at defined points (post-onboarding, periodic check-ins).
- Collect and review feedback, comments, and ratings from clients and families.
- Identify themes, concerns, and positive comments to share with teams.
- Route serious issues or patterns to the appropriate leaders for follow-up.



04

## ESCALATIONS & RESOLUTIONS

*Owner: Supervisor / QA Lead*

- Capture complaints, urgent concerns, and special requests in a consistent log.
- Acknowledge receipt to the client or family within defined timeframes.
- Investigate the issue, coordinate with staff, and agree on a resolution plan.
- Communicate the outcome back to the client or family and document closure.