



Using the Family Council Platform

The full how-to — current as of this build

The big picture

The platform is a private, members-only website. Families log in and see the calm, family-facing side; officers see all of that plus the working board behind a sign-in. A family speaks up → an officer sorts it → it goes to the right person → the family hears back → it gets resolved, with a record. **The platform remembers and organizes; you bring the judgment.**

Three kinds of people

- **Members (families)** — log in, see the family pages, raise concerns and compliments. They never see the officer side.
- **Officers (us)** — see everything: the board, all tools, and the family pages. Admins (Chele + Carrie F.) can also add/remove officers and members.
- **Management (Edgemere)** — a narrow, separate portal where they see only the concerns we choose to share, and respond — with our approval before anything posts.

The officer board — the daily work

Reading it

Concerns are cards in four columns: Logged → Raised with management → In progress → Resolved. A colored left edge shows severity (red = immediate, orange = high, yellow = moderate, green = low). The “Open by severity” panel (top right) shows how many urgent items are open — click a color to filter.

Working a concern

1. Click a card to open it.
2. Set the type — Needs action, Suggestion, Question, Just sharing, or Compliment.
3. Set severity with the five questions: could someone be harmed? dignity or safety? can the resident not report it themselves? does it cost a family money? has it happened more than once? Any “yes” raises it. Safety is red and goes to leadership — no solo downgrades.
4. Set the Area (housekeeping, dining, etc.) — this is its own field; changing the owner doesn't change it.
5. Assign an owner, and move the status to where it really is. Assigning a name isn't progress — the status is what shows movement.

TIP Many concerns are already handled in real life but still sit in “Logged.” Marking those resolved is the fastest way to show the Council is working.

Keeping families updated

In any card, write an update and choose who it goes to — the family who reported it (if they left an email) or a Council contact. The platform drafts the email and opens your mail app; nothing sends until you press send. Every update is logged.

Council summary (softening for management)

You can add a calm “Council summary” to a concern for management's eyes — but the family's original words are NEVER changed. Both are kept; the summary sits alongside, clearly labeled.

Finding themes (the AI helper)

When the list gets long, click “ Suggest themes.” The platform reads the active concerns and proposes groupings (“these six are about laundry”). It only suggests — nothing moves until you confirm. You can pull an item out of a group, bulk-move a whole group's status/owner/severity (with a confirmation), or turn a theme into a Major Project — one tracked ask with a ready-made summary, assigned to a department.

Monthly department reports

1. Click “Monthly report” (top-right).
2. Pick the department and month.
3. Save as PDF or send as an email draft.

The report leads with what needs attention, then what's new, what's still open (with how long), and what's resolved. It never includes a resident's name, room number, or family email.

The Council Tools menu

Grouped into sections for quick scanning:

- **Quick access** — Bulletin (approve/remove community notes), Helpdesk (report platform bugs/ideas), View as management (preview what Edgemere sees).
- **Manage** — FAQs, Services, Members, Team, Officers (admins), and the Management portal (approve responses, add mgmt logins).
- **View** — Dashboard (the public view), Archived (recover archived concerns).
- **Utilities** — Guide, Download backup, Sign out.

The bulletin board

Families post thank-yous, celebrations, welcomes, and events. Text notes appear instantly unless they trip a safety word; anything with a photo or a flagged word is held for an officer. In Council Tools → Bulletin, approve held notes and remove reported ones. Give it a daily glance.

The FAQ & the Sprout

Families search common questions or ask the Sprout, which answers only from approved FAQs. In Manage FAQs you can add, edit, or delete any answer — the page and the Sprout update immediately. If families keep asking something, just add it as an FAQ.

Resident Services

A page listing services families may not know about (Augustine caregivers, the on-site clinic). In Manage Services you can add or edit entries anytime — no code needed.

Managing people

Admins add/remove officers (Manage Officers) and members (Manage Members). Adding someone sends them a link to set their own password; removing them cuts access immediately. New families can request to join from the login screen — approve or decline in Manage Members. To open the site to management, add a management login in the Management portal panel.

Always remember

- **Safety first.** Red concerns go to leadership immediately. Emergency happening now? Tell them to call 911 first.
- **Be kind with “just sharing.”** Acknowledge; don't turn every worry into a work order.
- **Protect privacy.** Never post a resident's name, room number, or a family's email publicly. That stays behind the sign-in, always.
- **Report ideas in the Helpdesk,** not by text — so nothing gets lost.

The Plaza at Edgemere · Family Council — officer guide. Keep this where new officers can find it.