

Family Dashboard Guide

A deeper guide to purpose, meaning, and
how this dashboard is used over time



EverGuide

Trusted Guidance
for Life's Transitions

Why this dashboard exists

Families do not struggle because they do not care. They struggle because care unfolds over time, information fragments, and small changes happen quietly between appointments. Important details live in text messages, phone calls, or one person's memory until a crisis forces decisions.

The Family Dashboard exists to prevent that drift. It creates one shared place where what matters, what is being noticed, and what is changing are made visible, current, and shared.

This is not a medical record. It is a communication tool designed to support clearer decisions, earlier conversations, and calmer coordination.

How EverGuide works with families

EverGuide works directly with the individual and the people who support them. Our role is not to replace clinicians or make decisions. Our role is to help families maintain a shared understanding as circumstances change.

We do this through a structured rhythm of conversation, observation, and synthesis that keeps information from becoming stale or siloed.

The foundational conversation

The process begins with a foundational conversation that typically includes the individual, whenever possible, and one or more family members or care partners. This conversation focuses on how the person is living today, what matters most to them, and what family members are noticing in daily life.

This is not a clinical intake and not about predicting the future. It is about establishing a shared starting point so that future changes can be understood in context.

What we mean by a baseline

A baseline is a reference point, not a score or judgment. It captures how the person is functioning and experiencing life at a specific moment in time, using both the person's voice and family observations.

Without a baseline, families rely on memory. Memory is unreliable under stress. A baseline allows families to recognize meaningful change early, when there is time to respond thoughtfully.

Ongoing check-ins and cadence

After the foundational conversation, EverGuide supports ongoing check-ins. These may occur monthly, quarterly, or when something meaningful changes. The cadence is intentional. It allows small changes to be seen before they accumulate into crisis.

Check-ins may involve the individual, family members, or both. The same core questions are revisited so that comparisons across time are meaningful.

Action Items

Action Items appear only when there is a clear, practical step a family member can reasonably take. They are used for coordination, not alarm. If there is no clear task, no Action Item appears.

Examples include reviewing a document, acknowledging an update, sharing a summary at an appointment, or completing a scheduled check-in.

Advance Directive Status

An Advance Directive is a legal document that records a person's wishes for medical care if they cannot speak for themselves. It often includes who they want to make decisions on their behalf.

This panel shows whether an Advance Directive exists, its current status, and where the most recent version can be accessed. Documents can become outdated, so confirmation is essential.

The Person and What Matters Most

This section anchors the entire dashboard. It reflects what the person values, fears, hopes to preserve, and prioritizes in daily life and care. All other information should be read through this lens.

Well-Being Snapshot

The Well-Being Snapshot is a short narrative summary written in plain language. It answers a single orienting question: How is this person doing overall right now?

It reflects lived experience, not clinical metrics, and is updated as circumstances evolve.

Family Snapshot

The Family Snapshot captures concrete observations from family members over time. These are not conclusions or diagnoses. They are descriptions of daily life.

Patterns across multiple observations matter more than isolated comments. This helps families detect gradual change early and reduce misunderstanding.

Icons and status indicators

Icons represent key domains of well-being. Status indicators show whether each area appears stable, improved, or changed compared to the baseline. They are signals for awareness, not conclusions.

The 4Ms and EverGuide's added domains

The dashboard is grounded in the 4Ms framework for age-friendly care: What Matters, Mobility, Mentation, and Medications. EverGuide includes additional domains—Expression, Enjoyment, and Health Challenges—to reflect the realities families experience outside clinical settings.

Provider Summary

The Provider Summary is a concise document designed for use during medical visits. It helps clinicians quickly understand priorities and changes over time. Families choose when to share it.

What happens when something changes

When change occurs, indicators may update, new observations may be added, and Action Items may appear only if there is a clear next step. This is how the dashboard prevents important information from being lost.

A final reassurance

Caring for someone you love is emotionally heavy. This dashboard exists so no one is carrying the full weight alone. It supports shared understanding, not certainty.

Does this reflect how things feel and what matters right now?