
FAMILY RISK REVIEW

Stage 2 — Clarify Priorities and Risks — Companion to the Family Health Coherence Method

Purpose: A sorting and prioritization worksheet that helps a family distinguish what requires attention now, what matters next, what remains unknown, and what can be monitored.

This resource is an educational and family-coordination tool. It is not a diagnosis, medical directive, emergency assessment, legal instrument, or substitute for a physician, attorney, licensed care provider, or lawful decision-maker.

Emergency boundary: if you believe someone is in immediate danger or experiencing a medical emergency, stop using this worksheet and contact local emergency services or the appropriate treating professional.

Privacy: complete and share this document only through methods appropriate for the sensitivity of the information.

* A. Review Information

Family or household name:		Person at the center:	
Date of review:		Completed by:	
People consulted:			
Information still missing:			

* B. Four Sorting Categories (Reference)

URGENT NOW

Potential immediate danger, rapid change, or time-sensitive issue requiring emergency services, same-day clinical direction, or immediate safety action.

IMPORTANT NEXT

Material issue needing a planned action, owner, or professional follow-up soon, but not currently an emergency.

UNKNOWN / MUST CLARIFY

Concern that cannot be prioritized responsibly until facts, authority, instructions, or professional guidance are confirmed.

MONITOR / STABLE FOR NOW

Known issue with a current plan that appears to be holding, but still requires an owner and a review trigger.

* C. Risk Domains

Immediate safety:	
Medication:	
Mobility and falls:	
Nutrition and hydration:	
Cognition, behavior, communication:	
Breathing or respiratory support:	
Skin, wounds, and pressure:	
Pain, comfort, symptom change:	
Caregiver capacity:	
Appointments and follow-up:	
Conflicting instructions/info gaps:	
Decision authority:	
Coverage and staffing:	
Transition readiness:	
Home and household environment:	
Communication and privacy:	

* D. Concern Sorting Worksheet

Complete one card per concern. If more than 8 concerns apply, use the Additional Concerns field at the end of this section.

Concern #1

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #2

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #3

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #4

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #5

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #6

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #7

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Concern #8

Concern or risk:

Category (Urgent/Important/Unknown/Monitor):

What evidence do we have?

What still needs confirmation?

Who should be contacted?

Action owner:

Target date:

Backup or escalation step:

Additional concerns (if more than 8 apply):

* E. Failure-Point Forecast

What is most likely to fail next if nothing changes?

What quiet risk is receiving too little attention?

What plan depends entirely on one person?

What instruction is difficult to carry out in the actual home or household?

What transition is approaching without adequate preparation?

What conflict or uncertainty is delaying action?

' F. Protective Factors

What is already working well?

Who is reliable and available?

What written plan or document already exists?

What services, resources, or finances are available?

What strengths does the person or family bring?

' G. Ranked Priority Summary

Priority 1:		Reason/owner/deadline:	
Priority 2:		Reason/owner/deadline:	
Priority 3:		Reason/owner/deadline:	
Priority 4:		Reason/owner/deadline:	
Priority 5:		Reason/owner/deadline:	
Top unknown to resolve:		Next professional contact:	

' Method Handoff

Stage 2 output: a ranked risk and priority map. Move every priority into the Responsibility Map. Any priority without a confirmed owner, authority basis, deadline, and backup remains a governance gap.

Use the Charter's language for accountability gaps, caregiver backup, home safety and staffing risks, crisis escalation, and review triggers. This worksheet is a family-prioritization instrument, not a validated clinical risk score.