
WHEN TO REVISIT YOUR STRATEGY

Stage 7 — Review, Adjust, and Preserve Continuity — Companion to the Family Health Coherence Method

Purpose: A short trigger checklist that helps a family recognize when its current health strategy, role map, system map, or Charter may no longer fit the situation.

A strategy is a living plan. It should not remain unchanged merely because it once worked. Review it after a material change, when important actions are missed, when the family is operating from different versions of the plan, or when the current structure no longer protects dignity, safety, continuity, or caregiver capacity.

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.

' A. Revisit the Strategy After a Health Change

■ A hospitalization, emergency visit, or rehabilitation stay

■ A new diagnosis or meaningful change in prognosis

■ A major treatment, medication, equipment, or therapy change

■ New or worsening symptoms, function, cognition, mobility, breathing, skin, pain, or nutrition concerns

■ A fall, injury, or repeated near-miss

■ A change in the person's ability or willingness to participate in decisions

' B. Revisit After a Care or Household Change

■ The primary caregiver becomes ill, exhausted, unavailable, or unable to continue

■ A new caregiver, nurse, agency, household employee, or staffing arrangement begins

■ Coverage hours or skill requirements change

■ A move, home renovation, second residence, travel period, or change in care setting

■ Equipment, supplies, transportation, meals, or home routines no longer support the plan

' C. Revisit After a Provider or Information Change

■ A new physician, specialist, pharmacy, therapist, agency, or facility becomes involved

■ Providers give instructions that appear inconsistent

■ Important records, medication lists, or discharge instructions are missing or outdated

■ Information is not reaching the proper family member, caregiver, or professional

■ Permission, privacy, portal access, or communication arrangements change

' D. Revisit After an Authority or Family Change

■ Healthcare proxy, power of attorney, guardianship, fiduciary, or other governing documents are created, changed, activated, questioned, or unavailable

- The person holding a key role is no longer willing, able, or appropriate

- Family priorities, relationships, or participation change

- A disagreement is preventing timely action

- The person at the center expresses different values, goals, or quality-of-life preferences

* E. Revisit When the Plan Is Not Holding

- Important actions are repeatedly missed or delayed

- The same problem is being discussed without resolution

- No one can clearly state who owns the next step

- The family is reacting to events instead of following an agreed plan

- One person is carrying too much of the system without backup

- Costs, time demands, or operational complexity have become unsustainable

- A risk marked 'monitor' has changed or worsened

* F. Scheduled Review

Next planned review date:

Person responsible for initiating the review:

Who should participate:

Documents to update:

Charter sections to re-ratify:

Strategy and action records to close or carry forward:

* G. What Has Changed?

What is new?

What is no longer true?

What worked?

What did not work?

What was completed?

What was missed?

What remains unresolved?

What new risk or opportunity is now visible?

* H. Decide What to Do With Each Part of the Plan (Reference)

KEEP: Still appropriate, owned, and working

CHANGE: Still needed but the method, owner, timing, or resource must change

STOP: No longer appropriate, authorized, useful, or sustainable

ADD: New action, person, resource, document, or contingency is required

TRANSFER: Responsibility must move to a different person, professional, or entity

CONFIRM: Facts, authority, instructions, or permissions remain uncertain

° I. Where to Re-enter the Method (Reference)

Return to Stage 1: The facts or circumstances have materially changed.

Return to Stage 2: Priorities or risks must be re-ranked.

Return to Stage 3: Roles, authority, resources, or backup have changed.

Return to Stage 4: Connections, dependencies, communication, or sustainability have changed.

Return to Stage 5: A revised written strategy is required.

Return to Stage 6: The strategy remains sound, but implementation or follow-through is failing.

° J. Review Decision

Date reviewed:		Review led by:	
Stages being reopened:			
Immediate next action:		Action owner:	
Target date:		Next review date:	

° Method Handoff

Stage 7 output: an explicit decision about what must be corrected, sustained, transferred, stopped, added, or reconsidered. When the situation changes materially, Stage 7 returns the family to Stage 1 rather than allowing an outdated plan to remain authoritative.

Charter alignment: pull the calendar-based and trigger-based review language directly from the Charter's Review and Update Cadence. Any changes to decision authority, document location, communication, crisis response, caregiver backup, safety, or staffing should also update the corresponding Charter section.