



# Risk & Resilience through transparent care:

Ensuring Safety, Reducing Risk, and Strengthening Trust

OALA  
November 10, 2026

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WHAT TO EXPECT FROM THIS SESSION

## What to expect from today's session

This session explores how transparent care practices can strengthen trust while reducing risk exposure in senior living settings.

- Understand how transparent care practices support proactive risk mitigation.
- Learn how visibility and communication tools improve response time and outcomes.
- Identify operational gaps that increase risk and how to close them.
- Explore strategies for building resilient, data-informed care teams.



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INTRODUCTIONS



**Bryant McCann**

Director at Sage

17 years in Senior Living advocating and problem solving WITH Operators to utilize technology to drive quality outcomes

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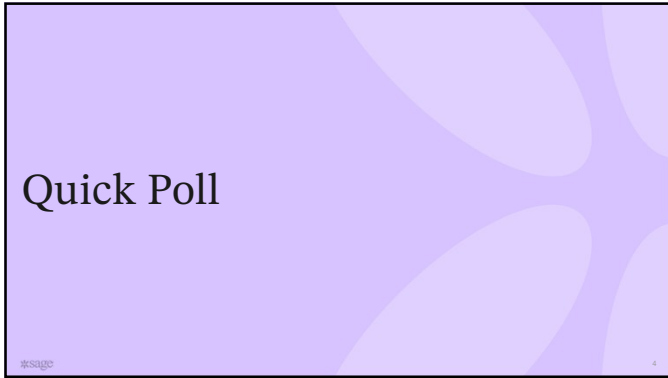
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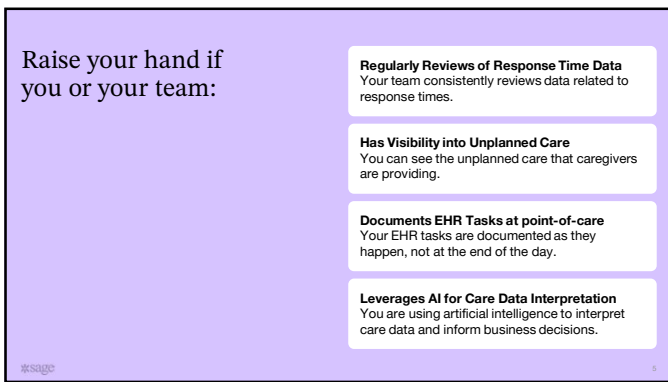
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Some risk exposure is obvious



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Other risk exposure can be harder to identify and potentially more destructive

- Delayed Response Times
- Documentation Gaps
- Communication Breakdowns
- Staffing Misalignment
- Misuse of AI/using AI without a plan
- Interdepartmental Revenue Leakage

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Often times, how we operate and the processes we follow do not account for reality

**We operate as if:**

- Care plans are followed exactly
- Documentation is complete
- Teams communicate clearly

**What actually happens:**

- Care happens outside the care plan
- Documentation occurs after the shift
- Teams lack visibility into each other's actions

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These transparency gaps lead to risk exposure:

- Care delivered may not match documented care plans
- Delayed documentation raises audit concerns
- Incident timelines become unclear
- Incomplete documentation can impact reimbursement & cause revenue leakage

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Transparency starts with care workflows

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Today's reality

- Nurse call alerts managed reactively, one at a time
- Care plan tasks logged at end of shift, not in the moment
- Unplanned care delivered but undocumented, causing revenue leakage

Imagine a world where...

- EHR and nurse call operate in one unified workflow
- All care tasks (scheduled and unscheduled) are documented at point of care
- Every interaction builds a complete record, supporting LOC changes and closing revenue gaps

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### The Gap Between Planned and Actual Care Creates Care Blindspots



**EHR care plans track planned care**

Including routine activities such as:

- ADLs
- Medication administration
- Scheduled tasks



**Unplanned care goes undocumented**

Including responsive actions such as:

- Nurse Call alerts
- Observations
- Safety checks
- Timeline of events for a fall investigation

WISQIP 13

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### Disconnect between Care Plans & Workflows Increases Risk



**Separate Communication Tools**

Reliance on non-integrated tools for daily tasks leads to fragmented information and communication breakdowns.



**Delayed Documentation**

Documentation occurring after the shift can lead to forgotten or inaccurate information, impacting record integrity.



**Lack of Real-Time Visibility**

Leaders cannot see real-time care activity, hindering proactive management and timely interventions.

WISQIP 14

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### Integrated Tasking Brings Transparency to Daily Care

With Integrated Tasking, EHR's are integrated with care workflow tools; this allows for:

**Care teams to:**

- See planned tasks
- Document care in real time
- Log unplanned care
- Capture observations

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**Leadership to gain visibility into:**

- Care delivery
- Workload distribution
- Documentation completeness
- Revenue leakage & at risk length of stay

WISQIP 15

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Today's reality

- Shift handoffs are verbal with no structured record
- No remote triage, staff have to physically check every room
- No way to know if a colleague has already responded
- Call times only measure arrival speed, not care provided

Imagine a world where...

- Structured shift notes from the outgoing team are ready before you start
- Two-way voice lets you triage with a resident before entering the room
- Live alert status eliminates duplicate responses
- Response data captures claim, handle, and resolution, giving leadership a full picture

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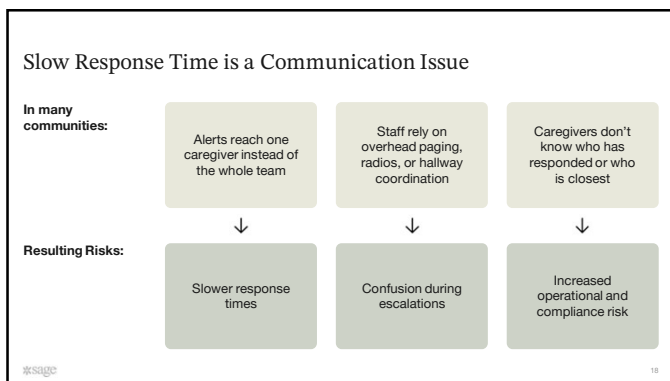
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### Transparent Communication is the key to faster response times

The right technology, featuring real-time alerts, dynamic escalation, and AI insights, is essential for achieving faster response times through transparent communication.

Care teams must have access to:

**Faster Alert Acknowledgement**

Teams can acknowledge alerts more quickly, reducing delays in response.

**Clearer Escalation Paths**

Defined pathways ensure alerts are routed to the correct personnel efficiently.

**Reliable Caregiver Coordination**

Improved communication ensures caregivers are coordinated for better resident care.

How to achieve this? The right care technology

**Real-time Alerts**

Technology that sends immediate notifications to all relevant staff within a defined range.

**Dynamic Escalation Paths**

Adjustable escalation procedures that align with current community protocols and the ability to triage remotely.

**AI-Powered Insights**

Tools that use artificial intelligence to help leaders interpret data and make informed decisions.



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## Staffing transparency



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### Today's reality

- No visibility into top or low performers
- Blame game and finger-pointing fill the gaps that data should
- Shifts are over or under staffed based on historical patterns or guesswork
- Efficiency gaps across buildings with no clear explanation why

### Imagine a world where...

- Every caregiver's response times, alert volume, and shift performance are visible
- Time-stamped documentation replaces hearsay
- Staffing recommendations are driven by actual census and level of care distribution, not gut instinct
- You can see which buildings are hitting labor budgets and replicate what's working

#### Overtime Performance

Total overtime: 74 hours

Total overtime cost: \$1,700

#### Level of Care Distribution

(Level of Care, Not Weight Based)

(Open Task: Understanding)



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OALA - Fall Conference & Trade Show

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If you can't see the work,  
you can't staff correctly

**Traditional staffing models rely on:**

- Fixed ratios
- Historical schedules
- Census data
- State and government intervention

**Real workloads include:**

- Planned care
- Alerts
- Unplanned care
- Falls and accidents
- Safety checks
- Observations

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These transparency gaps  
lead to risk exposure:

**Safety Risk**  
If caregivers are stretched too thin

**Compliance / documentation risk**  
If actual care is not being recorded

**Operational risk**  
Due to missed revenue if staffing doesn't match care needs

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Leveraging the right data can optimize staffing  
decisions & reduce risk:

Data that should drive staffing decisions include:

**Planned care**  
Care plan tasks and scheduled support needs

**Unplanned care**  
Emergency alerts and unexpected resident needs

**Caregiver performance**  
Response times and care delivery patterns

**State staffing regulations**  
Compliance requirements and documentation standards

The result? Safer communities, more-defensible staffing decisions, & reduced operational risk

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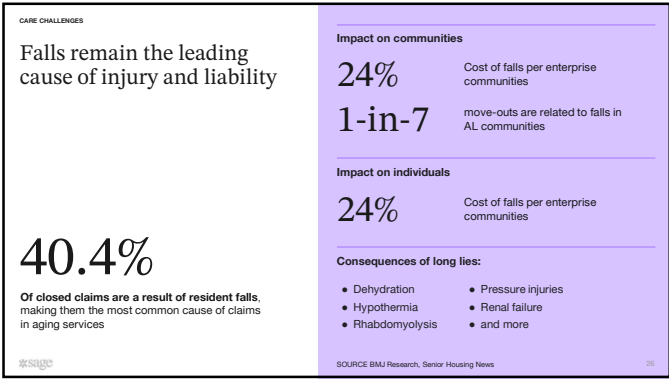
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Slide 27 is divided into two columns. The left column, titled "Today's reality", lists the following points:

- A fallen resident could go undetected for hours
- No visibility into what triggered an emergency or what preceded it
- Fall management lives in a separate app, siloed from EHR and nurse call
- Risky behavior only detected through direct line of sight

The right column, titled "Imagine a world where...", lists the following points:

- Fall alerts flow directly into the care workflow your team already uses
- Preventative alerts fire before a fall based on individual resident behavior
- Fall management, EHR, and nurse call share unified insights
- Root cause analysis is visible, reducing ER visits and hospital admissions

To the right of the text in the right column is a smartphone screen displaying an "Alert Details" notification. The notification shows "Claimed by Me • 1m 53s", "Potential Fall Detected Room 101", and a video thumbnail with the text "Unlock and View the Footage". Below the video, it says "Fall may be near the end of the video".

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### Inefficient fall management can increase risk exposure

Typical fall management issues:



**Unclear timelines**



**Incomplete data**



**Length of time on the floor**



**Lack of visibility into how a fall happened**

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### The right technology and data can improve incident reviews & learning



**Incident Timeline Visibility**  
Clear chronological logging of events as they unfold.



**Response Tracking**  
Monitoring the speed and effectiveness of actions taken during incidents.



**Supporting Documentation**  
Centralized access to all relevant records and evidence.



**Privacy-Protected Review**  
Facilitating thorough analysis without compromising confidentiality.

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### Ensuring resident safety and dignity requires a commitment to ethical transparency

- Privacy-First Technology
- Limited Access Controls
- Clear Incident Review Policies
- Resident Consent & Perspective
- Clear Operating Procedures and Guidelines for Usage



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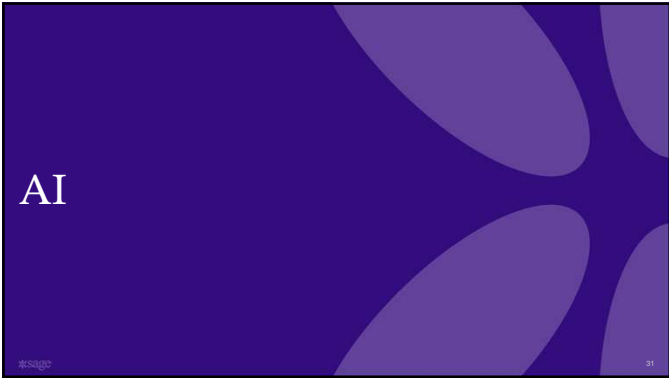
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### Today's reality

- Hours spent manually logging data across disconnected systems
- Dashboards built by hand from fragmented sources
- Family conversations rely on guesswork rather than real visibility into resident needs

### Imagine a world where...

- Real-time business intelligence is surfaced automatically and delivered to your inbox
- Labor, fall, and nurse call data sync to your EHR as a single source of truth
- Every month surfaces a clear list of residents ready for an LOC change and exactly why, along with a clinical risk report

| Resident | Care trend                             | Clinical trends                                        |
|----------|----------------------------------------|--------------------------------------------------------|
| Room 102 | Increased Transfer assistance requests | Possible early functional decline, increased fall risk |
| Room 103 | Increased toileting                    | Possible UTI                                           |
| Room 104 | Frequent complaints of pain this week  | Possible updates needed to pain management plan        |

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### What AI tools can unlock for your communities

**Aggregate and organize all care data** into a single, structured view

**Identify trends in resident needs and acuity** over time

**Surface early warning signs** of decline or risk that may otherwise go unnoticed

**Detect potential incidents**, including falls, sooner than manual observation alone

**Proactively alert** teams before issues escalate

**Turn fragmented data into clear, actionable insights** for clinical and operational decisions

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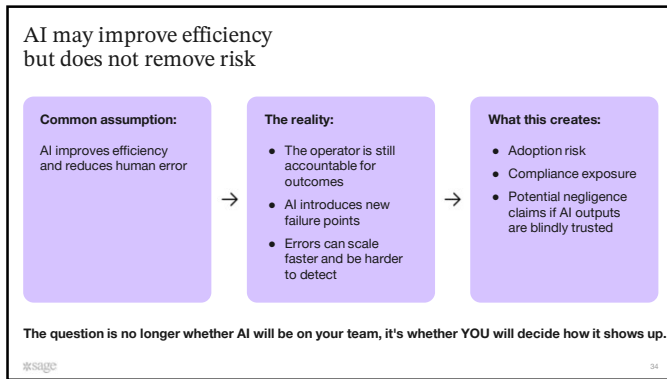
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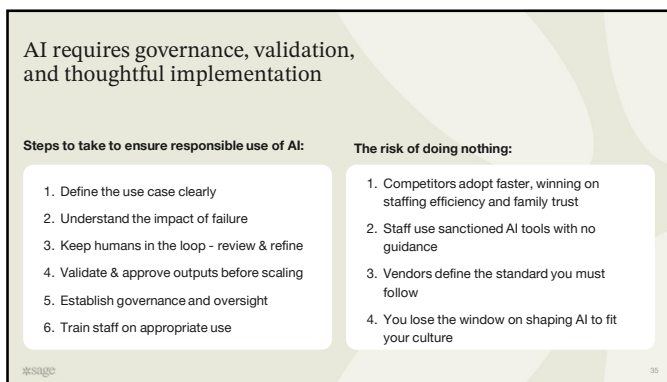
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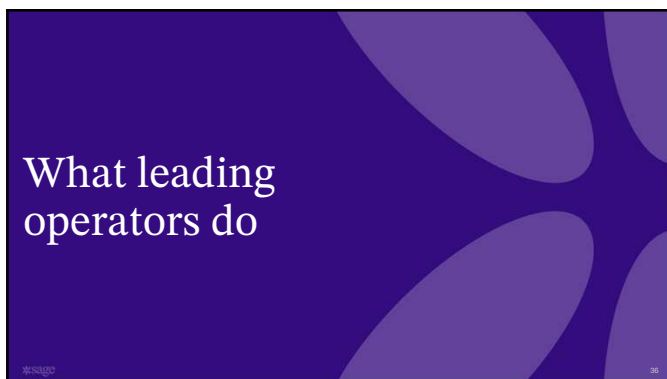
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How leading operators drive operational excellence while managing risk

Regular Care Data Review

Optimize Labor Through Visibility

Find the Right Tech Partner

Connecting Care Plans to Workflows

Incident Reviews for Learning

Implement AI Governance

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What leaders say after implementing transparent systems



**Improved Caregiver Confidence**  
Caregivers feel more assured and capable in their roles.



**Faster Response Times**  
Incidents and requests are addressed more quickly.



**Clear Incident Documentation**  
All incidents are recorded with clarity and accuracy.



**Stronger Family Communication**  
Enhanced and more effective communication with families.

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Actionable takeaways

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### Practical steps leaders can take today to improve transparency & reduce risk

**Step 1**

**Connect Care Plans to Workflows**  
Ensure planned care is seamlessly integrated with daily caregiver tasks and documentation.

**Step 2**

**Review Response & Incident Data**  
Establish a regular cadence for analyzing response times and incidents to identify trends.

**Step 3**

**Improve Visibility into Unplanned Care**  
Implement systems to capture and highlight unexpected care events for management.

**Step 4**

**Embrace AI - write it's story at your organization**  
Create a philosophy and easy to follow SOP for adopting AI within your organization

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### Thank you!



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