Fifteen-Minute Reset Card

This reviews the plan, not the person. Fifteen minutes is a coordination target, not a test.

TIME	REVIEW
0–3 min	Open actions: status, owner, target date, provider dependency, item no longer needed
3–6 min	People and routes: trusted people, known provider/emergency routes, consent, formal-provider changes
6–10 min	Guardrails and recovery: alerts, primary email, recovery, MFA, phone/carrier, devices, updates, backup, provider follow-up
10–13 min	Changes and triggers: incident, near miss, repeated contact, move, new device/number/account/provider/adviser/caregiver, breach
13–15 min	Record only needed actions; give each an owner and date; set next review; stop

NO SURVEILLANCE

No transaction-by-transaction audit, hidden account review, message reading, device inspection, location tracking, relationship monitoring, score, or capacity test.

Maintenance Dashboard

One current snapshot of the plan. No balances, credentials, or ratings of any person.

Last reset date	
Cadence selected	[ ] MONTHLY [ ] QUARTERLY [ ] OTHER
System status	[ ] STABLE [ ] OPEN ITEMS [ ] TARGETED REVIEW [ ] DEEPER REVIEW [ ] INCIDENT EXIT
Number of open actions	
Next review date	
Annual reset month	
Dated resource page last verified	
One current plan-improvement note	

INCIDENT EXIT

If money, credentials, identity information, account/recovery settings, software, screen sharing, or device access may have moved, stop maintenance and use Branch B and Chapter 11; toolkit Exposure Sort (POST-01), First Response Card (POST-02), and Response Matrix (POST-04A/B).

Open Actions & Owner Log

The assigned owner is responsible for following up, not for controlling the parent's account, device, or decision.

ACTION CATEGORY	SHORT ACTION	STATUS	OWNER	PERMISSION / PROVIDER DEPENDENCY	TARGET DATE	NEXT REVIEW

STATUS OPTIONS

OPEN / WAITING ON PROVIDER / COMPLETED / DECLINED / NOT AVAILABLE / NOT APPLICABLE

Roles, Consent, and Known Routes Check

Update family records and provider-recognized arrangements separately.

ITEM	STILL CURRENT?	CHANGE / OWNER / DATE
Parent/account owner and participants		
Primary trusted person		
Backup trusted person		
Optional local support		
Permissions and prohibitions		
Voluntary sharing arrangements		
Known family routes		
Bank/card/brokerage routes		
Primary email/carrier/device routes		
Emergency and local routes		

FORMAL CHANGE RULE

A family record does not change a provider role, account permission, ownership arrangement, power of attorney, or other legal status. Use the provider or legal process.

Guardrail & Recovery Status Check

Review status only. Never copy the credential, code, balance, or report contents.

CATEGORY	STATUS	BURDEN / CHANGE	OWNER / DATE
Selected account alerts			
Duplicate notice or visibility, if any			
Brokerage trusted contact			
Provider restrictions / transfer controls			
Credit freeze / fraud alert / credit-report choice			
Primary email / recovery phone or email			
MFA category			
Backup/recovery-code private storage status			
Device update / backup status			
Carrier / SIM / port-out status			

Trigger-Event Review Map

When something changes, decide whether it calls for a targeted review, a deeper review, or incident response.

ROUTE	USE WHEN	EXAMPLES
Targeted review	One part changed	Phone/number/carrier; email/recovery; bank/card/app; one trusted person; one alert burden; provider route
Deeper Chapter 3 review	Several parts changed or priorities no longer match real life	Multi-exposure incident; major move; household/caregiving transition; retirement; bereavement; extended hospitalization
Incident exit	Value or access may have moved	Unfamiliar transaction/account; code disclosed; recovery change; software or remote access; identity misuse

ROUTING FACTS, NOT CAPACITY SIGNALS

A new relationship, adviser, caregiver, charity, contractor, platform, or payment method may justify checking the request rule. It does not authorize surveillance.

Annual Full Reset Checklist

Review the whole system once each year on a date the family will keep.

[ ] Parent confirms participants and cadence.
[ ] People and roles reviewed.
[ ] Consent and voluntary visibility reviewed.
[ ] Known routes reverified.
[ ] Communication-screening choices reviewed.
[ ] Financial alerts and provider guardrails reviewed.
[ ] Identity/credit choices and planned report review addressed.
[ ] Primary email and recovery chain reviewed.
[ ] Phone/carrier and devices reviewed.
[ ] Emergency page, incident card, and provider directory reviewed.
[ ] Open actions resolved or reassigned.
[ ] Obsolete routine copies retired.
[ ] One constructed scenario drill completed.
[ ] Next annual reset scheduled.

Annual reset date	
One plan improvement	
Owner / date	

Annual Scenario Drill Card

Use a constructed scenario. This tests the plan, not the person.

Scenario used	
What stays still?	
Which known route?	
Who is the trusted person?	
Did anything move or change?	[ ] NO [ ] YES [ ] NOT SURE
Branch	[ ] A [ ] B
SCREEN	USED / MISSED / NOT NEEDED
AUTHENTICATE	USED / MISSED / NOT NEEDED
FREEZE	USED / MISSED / NOT NEEDED
ESCALATE	USED / MISSED / NOT NEEDED
One plan improvement	
Owner / date	

NEVER TOTAL THE MARKS

No score, grade, pass/fail result, capacity inference, vulnerability rating, or effectiveness claim.

Dated Resource & Source Refresh Register

The last-verified date tells you when a route was checked; it doesn't guarantee the route is still current.

FUNCTION / RESOURCE	OFFICIAL ROUTE / SOURCE	LAST VERIFIED	NEXT CHECK	OWNER	STATUS

VOLATILE DETAILS

Phone numbers, URLs, hours, portal steps, platform menus, carrier features, and provider procedures require periodic and upload-day refresh.

Record Retirement & Incident File Guide

Keep one current routine set and keep incident/provider records separate.

ROUTINE PLAN RECORDS

- Keep one current family-plan set.
- Mark replaced copies SUPERSEDED.
- Remove obsolete duplicates from routine use.
- Never let the current set become a credential vault.

INCIDENT / PROVIDER RECORDS

- Keep case/reference numbers.
- Keep incident chronology and preserved original communications.
- Keep provider instructions and applicable reports.
- Keep dispute, insurance, tax, legal, or law-enforcement records where applicable.

NO UNIVERSAL DESTRUCTION DATE

Do not destroy an incident or provider record while it may still be needed. Follow provider instructions and applicable qualified legal, tax, insurance, or professional advice.

Current routine set location	
Incident file location	
Last version review	
Next review	