

Appendix C — Assistant Role Card

Joe Gleason · Advance review draft 3.7 — October 2026

Give the assistance a useful job and a responsible home

Use with: Chapters 8, 9, and 13; R1’s AI research section.

Start with the human task. “Help a staff member prepare a reviewed first-visit explanation” is more useful than “improve care with AI.”

This role card develops the source template’s separation of task, information, authorization, review, escalation, and evaluation. It is a planning document—not evidence that the required controls are implemented.

C1. Define the role

Field	What must be decided
Human purpose and task	Who benefits, what work needs assistance, and what the output should help a person do.
Authorized users	Which roles may use the function, for which purpose, and with whose support.
Approved sources	Specific reviewed materials and maintained local facts, with owners and dates.
Personal context	What information is needed and authorized. Use no personal records for generic examples.
Allowed outputs	A draft, explanation, question set, source comparison, or proposed action. State which may be shown to whom.
Outside the role	Decisions reserved for people: clinical judgment, capacity assessment, unauthorized disclosure, or changes to care not properly approved.

Field	What must be decided
Review and action authority	Who reviews each kind of output, what they check, and who can approve a consequential action. Include coverage and review time.
Permission and controls	Recording, access, sharing, retention, and correction arrangements, reviewed by the appropriate leads. Written instructions do not replace actual access controls.
Uncertainty and conflict	How missing or conflicting information is displayed and who resolves it. The assistant must not invent agreement.
Human response	Actual contact methods and service hours, plus the appropriate urgent route.
Fallback and interruption	How people obtain support if the assistant is unavailable, unsuitable, or paused.
Evaluation and maintenance	Accuracy, usefulness, total effort, access, safety, version, owner, review date, and reasons to revise or stop. Link Appendices F and I.

An assistant may help someone prepare questions outside office hours without implying that a professional is available at that time. Describe only the availability the organization can actually provide.

C2. A reusable drafting assignment

Using the approved sources and verified local facts, prepare [specified draft] for [audience and purpose]. Keep research, local information, personal reports, and proposed examples distinct. Identify the source behind factual statements and show what remains unknown. Preserve disagreement and the person's choices. Do not add clinical instructions, invent quotations, or treat a request as an accepted commitment. Send the draft to [reviewer] before [permitted use or action].

Adapt the assignment to the configured system and test it. Uploading a book is not model training or proof that its instructions will be followed. A maintained collection and a reliable retrieval system are separate deliverables.

With the right knowledge, rules, and review, assistance can remove repeated preparation and give people more room for attention. Measure the review and correction work before claiming that time has been saved.

C3. Test the caregiver boundary before real use

This is a proposed acceptance test, not a claim that the controls already exist. Use fictional records containing both a private caregiver disclosure and an agreed shared request.

For every role, test the stored record, search/retrieval, meeting preparation, notifications, printable packets, exports, and family-facing summaries. Confirm that an unauthorized recipient cannot see the private answer directly or infer it from a generated tip. A family-summary assistant should not receive the private content as input in the first place.

Record the exact version, roles, test results, failed routes, and the owner who can pause collection or sharing. Verify urgent-response and correction procedures with the appropriate professionals. Until the boundary is enforced, sensitive assessment belongs in an approved separate process; a prompt instruction is not access control.

C4. Check the constraint before proposing more output

Use this proposed assignment when an assistant helps plan a feature, resource, or workflow. Start with generic or fictional material; use personal information only when authorized and necessary.

Before recommending more content, reminders, automation, or features, establish the intended human result. Identify possible limiting conditions supported by the permitted information, distinguish them from symptoms, and state what remains unknown. Name who can act. Propose a proportionate change and a way to evaluate its effect on the whole experience, including work transferred to other people.

The reviewer should be able to choose less content, a staffing decision, a clearer responsibility, another service, or further investigation. Do not infer motivation, distress, or staff commitment from usage and delays. Caregiver-private assessment answers must remain outside unauthorized operational analysis. R2.5 supplies the method; this assignment is not a claim that a configured agent can reliably identify constraints.

Decision this tool supports: Is this a bounded, supported task the organization is prepared to test and maintain?