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**Nov 05 2025**

**SC Court of Appeals**

THE STATE OF SOUTH CAROLINA  
IN THE COURT OF APPEALS

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APPEAL FROM GREENVILLE COUNTY  
PERRY H. GRAVELY, CIRCUIT COURT JUDGE

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Appellate Case No. 2025-000366  
Civil Action No. 2022-CP-23-04055

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Stacey Grist as Agent under a Power of Attorney for  
Stanford W. Grist and as Trustee of the Second Amended  
Trust of Stanford W. Grist living Trust dated December 5, 2005,  
Stanford Grist Veterinary Services, LLC, Chestnut Ridge Farm, LLC,  
And Hilly Street, LLC,.....Appellant,

v.

Priscilla Mickie Grist, Caroline York Grist Lyon,  
Leyland H. Lyon, Jr., Jennifer Browning, Browning  
Geriatrics Consulting, LLC, Tracy Parson, Kiki’s Kare, LLC  
d/b/a Comfort Keepers, Erin Couchell Individually and as a  
member of Kiki’s Kare, Chris Couchell individually and as a  
member of Kiki’s Kare, LLC, and Kerry Burnett McCreary, Defendants,

Of which Jennifer Browning, Browning Geriatrics Consulting, LLC,  
Tracy Parsons, Kiki’s Kare d/b/a Comfort Keepers, Erin Couchell  
Individually and as a member of Kiki’s Kare, Chris Couchell  
Individually and as a member of Kiki’s Kare, LLC are the, ..... Respondents.

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**RECORD ON APPEAL  
VOLUME VI**

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Individually and as a member of Kiki's Kare,  
LLC*

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South Carolina Rules of Civil Procedure

Part V. Depositions and Discovery

Court Rule 30

(e) Submission to Witness; Changes; Signing.

When the testimony is fully transcribed the deposition shall be submitted to the witness for examination and shall be read to or by him unless such examination and reading are waived by the witness and by the parties. Any changes in form or substance which the witness desires to make shall be entered upon the deposition by the officer with a statement of the reasons given by the witness for making them. The deposition shall then be signed by the witness, unless the parties by stipulation waive the signing or the witness is ill or cannot be found or refuses to sign. If the deposition is not signed by the witness within 30 days of its submission to him, the officer shall sign it and state on the record the fact of the waiver or of the illness or absence of the witness or the fact of the refusal to sign together with the reason, if any, given therefor; and the deposition may then be used as fully as though signed unless on a motion to suppress under Rule 32(d)(4) the court holds

that the reasons given for the refusal to sign  
require rejection of the deposition in whole or in  
part.

DISCLAIMER: THE FOREGOING CIVIL PROCEDURE RULES  
ARE PROVIDED FOR INFORMATIONAL PURPOSES ONLY.  
THE ABOVE RULES ARE CURRENT AS OF APRIL 1,  
2019. PLEASE REFER TO THE APPLICABLE STATE RULES  
OF CIVIL PROCEDURE FOR UP-TO-DATE INFORMATION.

VERITEXT LEGAL SOLUTIONS

COMPANY CERTIFICATE AND DISCLOSURE STATEMENT

Veritext Legal Solutions represents that the foregoing transcript is a true, correct and complete transcript of the colloquies, questions and answers as submitted by the court reporter. Veritext Legal Solutions further represents that the attached exhibits, if any, are true, correct and complete documents as submitted by the court reporter and/or attorneys in relation to this deposition and that the documents were processed in accordance with our litigation support and production standards.

Veritext Legal Solutions is committed to maintaining the confidentiality of client and witness information, in accordance with the regulations promulgated under the Health Insurance Portability and Accountability Act (HIPAA), as amended with respect to protected health information and the Gramm-Leach-Bliley Act, as amended, with respect to Personally Identifiable Information (PII). Physical transcripts and exhibits are managed under strict facility and personnel access controls. Electronic files of documents are stored

in encrypted form and are transmitted in an encrypted fashion to authenticated parties who are permitted to access the material. Our data is hosted in a Tier 4 SSAE 16 certified facility.

Veritext Legal Solutions complies with all federal and State regulations with respect to the provision of court reporting services, and maintains its neutrality and independence regardless of relationship or the financial outcome of any litigation. Veritext requires adherence to the foregoing professional and ethical standards from all of its subcontractors in their independent contractor agreements.

Inquiries about Veritext Legal Solutions' confidentiality and security policies and practices should be directed to Veritext's Client Services Associates indicated on the cover of this document or at [www.veritext.com](http://www.veritext.com).



**FILED**  
**JUL 29 2020**  
**GREENVILLE COUNTY**  
**PROBATE COURT**

STATE OF SOUTH CAROLINA  
COUNTY OF GREENVILLE

IN THE PROBATE COURT  
CASE NUMBER 2020GC230008

IN THE MATTER OF:

STANFORD W. GRIST  
An Alleged Incapacitated Individual(A.I.I)

Date: July 29, 2020

Preliminary report of the GAL, Jennifer Browning

This report serves as a preliminary report to inform the court of my current findings in the matter of Stanford W. Grist. Information is still pending the final completion of the GAL report.

The following persons have been interviewed and or documents reviewed:

1. Pleadings on the matter of Stanford W. Grist dated 7/13/20
2. Durable Power of Attorney of Stanford W. Grist 6/11/13.
3. Physician's affidavit for Emergency or Temporary Proceedings for Dr. Absher dated 6/29/20.
4. Affidavit of Priscilla Mickie Grist dated 7/13/20.
5. Affidavit of the Proposed Guardian dated 7/21/20.
6. Ex Parte Order for Emergency Relief and Notice of Hearing dated 7/15/20.
7. Notice of Motion and Motion for emergency order's Dissolution or Modification dated 7/28/19. Exhibits A, B, C, D, E.
8. Individual interview via telephone with Ms. Priscilla Mickie Grist on 7/16/20.
9. Individual interview via telephone with Mr. Neil Rabon on 7/23/20.
10. Individual interview via telephone with Mrs. Heather Scalzo on 7/21/20.
11. Individual interview via telephone with Mr. Tyler E. McLeod on 7/27/20 and 7/29/20.
12. Individual interview via telephone with Mr. Matthew Myers on 7/28/20.
13. Individual interview with Ms. Stacey Grist on 7/23/20.
14. Individual interview with Mr. Adam Lee on 7/29/20.
15. Individual interview with Ms. Theresa Horton on 7/29/20.

311 Mills Avenue, Greenville, SC 29605 Phone:864.233.5260 Fax: 864.240.9256



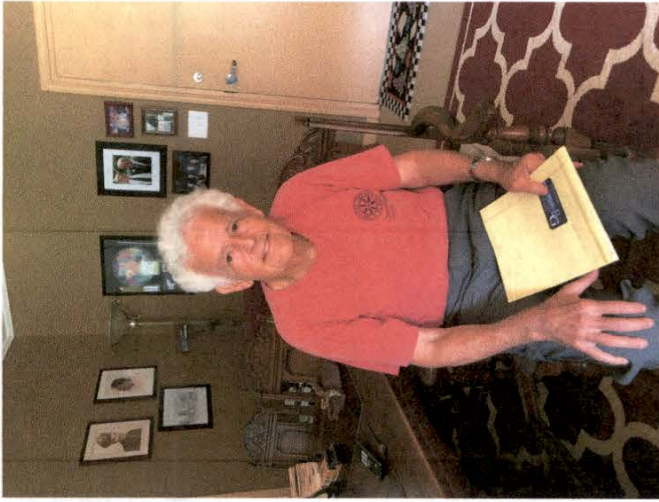
16. Individual interview with Mr. David Vickery on 7/21/20.
17. Messages left for Mr. Robert Tisdale, DSS caseworker on 7/20/20, 7/23/20, and 7/26/20. I have not received a returned phone call.

After careful review of the submitted information and interviews with the involved parties, there is conflicting information on the current condition and living situation of Dr. Grist. Per my telephone conversation with Ms. Stacey Grist on 7/23/20, she informed me that she would not reveal the location or contact information for Dr. Grist. A wellness check was completed on 7/24/20 at approximately 8:30 PM by Greenville County Sheriff's Department. He was living with his ex-wife, Ms. Marilyn Grist at her residence. Per my conversation with Deputy Williams, Dr. Grist was alert and oriented and deemed to be safe. I have not met with Dr. Grist and will need the opportunity to meet with him prior to making a recommendation to the court. I have communicated with Mr. Lee on 7/29/20 and he informed me he would facilitate a visit with his client this week.

Should the court decide to appoint a temporary guardian in this matter, it would be in Dr. Grist's best interest to appoint a neutral guardian. There is significant conflict amongst the family members, and this would allow for objectivity and transparency for Dr. Grist.

Respectfully submitted,

Jennifer Browning, LISW-CP, ACCFC, C-ASWCM  
Licensed and Certified Geriatric Care Manager  
GAL for Stanford W. Grist



Stan Grist 08/18/2020



STATE OF SOUTH CAROLINA  
COUNTY OF GREENVILLE

IN THE MATTER OF: STANFORD W. GRIST

an alleged incapacitated individual.

IN THE PROBATE COURT  
CASE NUMBER: 2020-GC-2300136 - 88

GUARDIAN AD LITEM REPORT

**FILED**

**JAN 29 2021**

**GREENVILLE COUNTY  
PROBATE COURT**

The undersigned court-appointed Guardian *ad Litem* in this guardianship and/or protective proceeding submits the following report concerning the investigation which was conducted pursuant to S.C. Code Ann. §62-5-106.

DURING MY INVESTIGATION, I INTERVIEWED THE FOLLOWING INDIVIDUALS:

| NAME OF PERSON INTERVIEWED:     | DATE OF INTERVIEW:                 | METHOD OF INTERVIEW (e.g. in person, by phone): |
|---------------------------------|------------------------------------|---|
| 1. Mr. Tyler Mcleod             | 7/27/20, 7/29/20                   | By phone  |
| 2. Mrs. Tracy Parsons           | Multiple calls, last on 1/28/21    | By phone  |
| 3. Mr. Hall Province            | 7/21/20, 7/28/20                   | By phone  |
| 4. Mr. Matthew Myers            | 7/28/20                            | By phone  |
| 5. Mr. Adam Lee                 | 7/28/20, 1/26/21                   | By phone and email                              |
| 6. Mrs. Stacy Grist             | 7/23/20                            |   |
| 7. Mrs. Priscilla Mickie Grist  | 7/21/20, 7/17/20, 7/18/20, 7/19/20 | By phone  |
| 8. Mrs. Heather Scalzo          | 7/21/20, 7/24/20, 8/18/20          | By phone, email and in-person                   |
| 9. Mrs. Carolyn York Grist Lyon | 7/21/20                            | By phone  |
| 10. Mr. Neil Rabon              | 7/23/20                            | By phone  |
| 11. Mrs. Theresa Horton         | 7/29/20                            | By phone  |
| 12. Mr. David Vickery           | 7/21/20                            | By phone  |
| 13. Mr. Robert Tisdale, DSS     | 7/20/20, 7/23/20, 7/26/20          | By phone(messages left)                         |

DURING MY INVESTIGATION, I REVIEWED THE FOLLOWING DOCUMENTS:

| TYPE OF DOCUMENT:   | PROVIDER OF THE DOCUMENT: |
|---|---------------------------|
| 1. Pleadings on the matter of Stanford W. Grist dated 7/13/20 | PAWS/Probate Court        |
| 2. Durable POA of Stanford W. Grist dated 4/3/19 and 6/11/13  | PAWS/Probate Court        |

| 3. Physician's affidavit for Emergency on Temporary Proceedings/Dr. Absher dated 6/29/20   | PAWS/Probate Court |
|--|--------------------|
| 4. Affidavit of Priscilla Mickie Grist dated 7/13/20   | PAWS/Probate Court |
| 5. Affidavit of Proposed Guardian dated 7/21/20  | PAWS/Probate Court |
| 6. Ex Parte Order for Emergency relief and Notice of Hearing dated 7/15/20.  | PAWS/Probate Court |
| 7. Notice of Motion and Motion for emergency orders Dissolution or Modifications dated 7/28/20 Exhibits A, B,C, D, E   | PAWS/Probate Court |
| 8. Notice of Right to Counsel dated 9/18/20.   | PAWS/Probate Court |
| 9. Order Denying Motion for Emergency Relief and Hearing dated 9/23/20.  | PAWS/Probate Court |
| 10. Certificate of Mailing(Conservatorship) dated 9/30/20.   | PAWS/Probate Court |
| 11. Reply to counterclaims(Conservatorship) dated 12/2/20.   | PAWS/Probate Court |
| 12. Reply to counterclaim(Guardianship) and reply to Counterclaim(Conservatorship) dated 12/3/20   | PAWS/Probate Court |
| 13. Acceptance of Service dated 9/29/20  | PAWS/Probate Court |
| 14. Acceptance of Service dated 9/10/20  | PAWS/Probate Court |
| 15. Summons dated 9/10/20  | PAWS/Probate Court |
| 16. Dr. Mullins Psychiatric Competency Mini Mental Status Examination dated 9/23/20.   | Mrs. Tracy Parsons |
| 17. Answer and Counterclaim of Charlotte Grist Smith aka Charlotte Roxanne Grist   | PAWS/Probate Court |
| 18. Answer and Counterclaim(Conservatorship) of Charlotte Grist Smith aka Charlotte Roxanne Grist  | PAWS/Probate Court |
| 19. Notice of Motion and Motion for Emergency Orders/Dissolution or Modification Charlotte Grist Smith aka Charlotte Roxanne Grist for appointment for a Conservator dated 9/10/20 | PAWS/Probate Court |
| 20. Motion to Dismiss and Response to Motion for Temporary Relief for Stacy Desiree Grist dated 10/30/20   | PAWS/Probate Court |
| 21. Affidavit of Carolyn York Grist Lyon dated 9/10/20   | PAWS/Probate Court |
| 22. Answer of Counsel(Conservatorship) of Stanford W. Grist  | PAWS/Probate Court |
| 23. Dr. James W. Davis, MD Medical Note  |                    |

dated 9/16/20.

Mrs. Tracy Parsons

24. Motion for Dissolution on or Modification  
Of Emergency Order for Stacy Desiree Grist  
dated 7/29/20

PAWS/Probate Court

25. Criminal Background Check and Credit report  
for Carolyn York Grist Lyon.

Traci Roberts

**I. REPORT ON ALLEGED INCAPACITATED INDIVIDUAL:**

1. Date and place of interview(s): 8/18/20, 9/2/20
2. Was the alleged incapacitated individual (A.I.I.) oriented to the time and place?  YES  NO
3. Describe the A.I.I.'s physical appearance: Dr. Grist appeared neat and clean. He was dressed appropriately for the time and season.
4. Who are the A.I.I.'s closest family members? Carolyn York Grist Lyon, sister, Stacy Desiree Grist, daughter, Priscilla Mickie Grist, daughter, Charlotte Roxanne Smith, daughter
5. Does the A.I.I. have a primary care physician or other treating medical provider? Yes, Galen Healthcare, Danielle Wong, NP
6. Does the A.I.I. have an attorney?  YES  NO  
 If yes, list the attorney's name, address, and phone number.  
Mrs. Heather Scalzo, 414-B Greenville, SC 29601. (864) 331-0111. Mr. Adam Lee and Mr. Mike Bridges, 220 Howe St. Greenville, SC 29601. (864) 271-8171.
7. Please list any known medical diagnoses of the A.I.I. Neurologic Disease, Severe Cognitive impairment, Brain Tumor, and history of thyroid disease
8. What are the current care and treatment needs of the A.I.I.? Dr. Grist requires 24/7 supervision and assistance with all of his ADL's. He is incontinent of bowel and bladder. He requires transportation to scheduled medical appointments.
9. What are the future care and treatment needs of the A.I.I.? The goal at this time is for Dr. Grist to remain in his residence with 24/7 caregivers. If his home care becomes an unsafe situation for Dr. Grist and he is unable to remain in his residence, a secured dementia care unit would be appropriate.
10. The A.I.I. has been rated or found to be: (*Check all that apply*):  
 Disabled;  
 Mentally ill or incompetent:

- Chemically Dependent; or
- None of the above.

11. The A.I.I. would benefit from: (*Check all that apply*);

- Further education;
- Further training;
- Therapy or treatment;
- Medical aids or equipment;
- An operation or medical procedure(s);
- Structural living arrangements;
- Psychiatric treatment; or
- None of the above.

12. Pursuant to S.C. Code Ann. §62-5-304A(A) and §62-5-407, as Guardian *ad Litem*, I believe that the A.I.I. should retain the following rights and powers:

(*Check the rights and powers you recommend the A.I.I. should retain.*)

- a.  Marry or divorce;
- b.  Reside in a place of the A.I.I.'s choosing, and consent or withhold consent to any residential or custodial placement;
- c.  Travel without the consent of a guardian;
- d.  Give, withhold, or withdraw consent and make other informed decisions relative to medical, mental or physical examination, care treatment, and therapies;
- e.  Make end-of-life decisions including, but not limited to, a "do not resuscitate" order or the application of any medical procedures intended solely to sustain life and consent or withhold consent to artificial nutrition and hydration;
- f.  Consent or refuse to consent to hospitalization and discharge or transfer to a residential setting, group home, or other facility for additional care and treatment;
- g.  Authorize disclosure of confidential information;
- h.  Operate a vehicle;
- i.  Vote;
- j.  Be employed without the consent of a guardian;
- k.  Consent to or refuse educational services;
- l.  Participate in social, religious, or political activities;
- m.  Buy, sell or transfer real or personal property or transact business of any type including, but not limited to, those powers conferred upon a conservator under S.C. Code Ann. §62-5-422;
- n.  Make, modify, or terminate contracts;
- o.  Bring or defend any action at law or equity; and
- p.  Other:

If necessary, please explain these recommendations. If additional space is needed, please use additional sheets and attach.

Dr. Grist is currently employed through his veterinary practice. He receives monthly income which is needed to pay for his care. He also receives other benefits such as insurance.

13. Is the A.I.I. capable of communicating, with or without reasonable accommodations, his or her wishes, interests, or preferences regarding the appointment of a guardian and conservator?  YES  NO If no, then proceed to **Section II**.
14. Does the A.I.I. think he or she needs help caring for himself or herself?  YES  NO  
If yes, in what areas? What is the plan to provide care for himself or herself?
- 
15. Does the A.I.I. think he or she needs help (i) managing his or her property or financial affairs, (ii) providing for his or her support, or (iii) providing support for his or her legal dependents?  YES  NO  
If yes, in what areas? What is the plan of the A.I.I. to manage property, financial affairs support or legal dependents?
- 
16. If a Petition for guardianship is pending, how does the A.I.I. feel about the proposed guardianship and the proposed guardian?
- 
17. If a Petition for conservatorship is pending, how does the A.I.I. feel about the proposed conservatorship and the proposed conservator?
- 

**II. REPORT ON THE PROPOSED GUARDIAN:**

*(If there is not a Petition for Appointment of Guardian pending, proceed to Section III.)*

18. Name of the proposed guardian: Mrs. Tracy Parsons
19. Relationship of the proposed guardian to the A.I.I. Professional Guardian(temporary)
20. Is the proposed guardian currently a primary caretaker for the A.I.I.:  YES  NO  
If no, who is? Comfort Keepers caregivers
21. What are the proposed guardian's long-term plans for the A.I.I.?  
Mrs. Parsons has stated she would keep him in his residence with 24/7 care as long as his care needs are able to be met and he can remain safe. If it is no longer a safe situation, Dr. Grist would need to be placed in a secured Dementia care unit.
22. Upon review of the proposed guardian's criminal background check, do you have any concerns regarding the ability of the proposed guardian to serve in this role?  
 NO  YES If yes, please explain your concerns.
-

23. Has DSS ever investigated the proposed guardian?  
 NO  YES If yes, please explain the circumstances and provide any information the DSS record revealed that you believe the Court should know.
- 
24. Did your investigation of the proposed guardian reveal anything that you believe the Court should know?  
 NO  YES If yes, please explain.
- 
25. Do you believe the proposed guardian is an appropriate person to serve as guardian for the A.I.I. considering (i.) his or her geographic location, (ii.) his or her familial or other relationship, (iii) his or her ability to carry out the duties of the guardianship, (iv) his or her potential conflict of interests, (v) the wishes of the A.I.I., and (vi) the recommendations of the relatives of the A.I.I.? Provide a detailed response.  
 Yes. Mrs. Parsons is well known to the Probate Court and has served on multiple cases throughout the years in various capacities. She is well versed in dementia and the resources for patients with dementia. She has done an excellent job as the temporary guardian in this matter and would be the most appropriate person to serve.
- 
26. Did your investigation reveal any other person who should be considered to be appointed the guardian in this matter?  NO  YES If yes, please explain, including the name, address, telephone number, age, and relationship to the A.I.I.
- 
- 
- 

**III. REPORT ON THE PROPOSED CONSERVATOR**

*(If there is not a Petition for Appointment of Conservator pending, proceed to Section IV).*

27. Name of the proposed conservator: Caroline York Grist Lyon
28. Relationship of the proposed conservator to the A.I.I.: Sister
29. Is the proposed conservator currently the primary person assisting the A.I.I. with his or her finances?  
 YES  NO If no, who is?  
Stacy Desiree Grist
30. What assets does the A.I.I. own or income does the A.I.I. receive that necessitates the need for a conservator?  
Dr. Grist owns real estate, receives employment income, has 3 active checking accounts, 2 money market accounts, IRA's, Stocks, Bonds, Cash, the Veterinary practice, and term-life insurance.
31. Upon review of the proposed conservator's criminal background check, do you have any concerns regarding the ability of the proposed conservator to serve in this role?  
 NO  YES If yes, please explain your concerns.
- 
- 
-

32. Has DSS ever investigated the proposed conservator?  NO  YES If yes, please explain the circumstances and provide any information the DSS record revealed that you believe the Court should know.
33. Upon review of the proposed conservator's credit report, do you have any concerns regarding the ability of the proposed conservator to serve in this role?  NO  YES If yes, please explain your concerns.
34. Did your investigation of the proposed conservator reveal anything that you believe the Court should know?  NO  YES If yes, please explain.
35. Do you believe the proposed conservator is an appropriate person to serve as conservator for the A.I.I. considering (i) his or her geographic location, (ii) his or her familial or other relationship, (iii) his or her ability to carry out the duties of the conservatorship, (iv) his or her potential conflict of interests, (v) the wishes of the A.I.I., and (vi) the recommendations of the relatives of the A.I.I.? Provide a detailed response.  
Due to the family discord and conflict in this case, it is my recommendation to the court to appoint a 3rd party professional conservator. This will allow for transparency among the parties. Mrs. Lyon also resides out of state in Rabun gap, Ga.
36. Did your investigation reveal any other person who should be considered to be appointed the conservator in this matter?  NO  YES If yes, please explain, including the name, address, telephone number, age, and relationship to the A.I.I.  
A third-party professional conservator appointed by the Court.

**IV. REPORT ON THE CONDITIONS OF PRESENT PLACE OF RESIDENCE AND FUTURE RESIDENCE**

37. Date and time visited: 8/18/20 at 11 am and 9/2/20 at 3:00 pm
38. Address (including street, city, county, state, zip):  
900 Old Highway 23 South, Traveler's rest, SC, Greenville County, 29690
39. Type of abode:  
One level abode.
40. Condition:
- a. Exterior: Fair, no noticeable areas of concern
  - b. Utilities working: Yes
  - c. Interior: Neat and clean, home-like with family pictures
  - d. Cleanliness: Clean

- e. Fire hazards: Dr. Grist would require assistance to safely evacuate in the event of a fire. Smoke detectors were present in the residence.
- f. Other (explain): \_\_\_\_\_

41. Is there a proposed change in the residential plan for the A.I.I.?  NO  YES If yes, please explain the plan and whether you believe the plan is in the best interest of the A.I.I.

\_\_\_\_\_

\_\_\_\_\_

**V. CONCLUSIONS AND ADDITIONAL COMMENTS**

42 Do you believe the A.I.I. is an incapacitated person pursuant to S.C. Code Ann. §62-5-101(13)?  YES  NO

43. Do you believe the A.I.I. needs a guardian?  YES  NO

44. Do you believe there is a less restrictive alternative to the guardianship or limitations that should be placed on a guardian?  NO  YES If yes, please explain.  
 Due to Dr. Grist's significant cognitive deficits (he is currently unable to remember how to use a cell phone), he requires a Guardian to make decisions as outlined in this report for him.

\_\_\_\_\_

\_\_\_\_\_

45 Pursuant to S.C. Code Ann. §62-5-304A(B), as Guardian *ad Litem*, I believe that a guardian's rights and powers shall include, but not be limited to:  
 (Check the rights and powers you recommend be vested with a guardian.)

- a.  Determine the place where the ward shall reside and consent or withhold consent to any residential or custodial placement;
- b.  Consent to travel;
- c.  Consent or refuse to consent to visitation with family, friends, and others;
- d.  Give, withhold, or withdraw consent and make other informed decisions relative to medical mental, or physical examinations, care, treatment, and therapies.
- e.  Make end-of-life decisions including, but not limited to, a "do not resuscitate" order or the application of any medical procedures intended solely to sustain life and consent or withhold consent to artificial nutrition and hydration;
- f.  Consent or refuse to consent to hospitalization and discharge or transfer to a residential setting, group home, or other facility for additional care and treatment;
- g.  Authorize disclosure of confidential information;
- h.  Consent to employment;
- i.  Make, modify, or terminate contracts related to the duties of the Guardian;
- j.  Consent to or refuse educational services; and
- k.  Bring or defend any action at law or equity.

If necessary, please explain these recommendations. If additional space is needed, please use additional sheets and attach.

Dr. Grist continues to receive a salary and benefits through his veterinary practice which is important for his care needs to be paid for and insurance and other benefits to continue. This needs to be taken into consideration with determining employment.

46. Do you believe the A.I.I. needs a conservator?  YES  NO

47. Do you believe there is a less restrictive alternative to the conservatorship or limitations that should be placed on a conservator?  NO  YES If yes, please explain.

48. Prior to your appointment, did you know the A.I.I.?  NO  YES If yes, please explain.

49. Prior to your appointment, did you know the person(s) seeking appointment as guardian and/or conservator?  NO  YES If yes, please explain.  
I have known Mrs. Tracy Parson as an associate in the field and have worked with her on multiple occasions.

50. Prior to your appointment, did you or do you now have a personal interest in these proceedings?  NO  YES If yes, please explain.

51. Do you believe there should be a formal hearing on this matter even if all parties are in agreement?  NO  YES If yes, please explain.  
Due to the multiple representations and conflict of the parties, a formal hearing would be recommended to have everything on the record.

52. Do you have any other recommendations relevant to this matter?  NO  YES If yes, please explain.

Signature: 

Name: Jennifer Browning, LISW-CP

Address: 311 Mills Avenue  
Greenville, SC 29605

Telephone: (864) 233-5260 ext 201

Email: jenniferbrowning@browninggeriatric.com

Attorney for: N/A

Executed this 29th day of January, 20 21.

Dr. Stanford Grist Medication list updated 11-5-2020

DOB 04/12/1948

Prescriptions:

Terbinafide HCL 250 MG one tablet every AM

Tadalafil 5 MG one tablet every AM

Levothyroxine 0.25 MG one tablet every AM

Vitamins:

Iodoral 1 tablet daily

Glucosamine Chondroitin (Omega 3-6-9) 3 tablets daily

Tri B 1 tablet daily

Vit C 1,000 chewable 2 tablets daily

Androvite 6 tablets daily

Juvenon 2 tablets daily

Vit E 400 units 1 tablet daily

Magnesium Malate 3 tablets daily

Magnesium Threonate 3 tablets daily



**FILED**  
**APR -7 2022**  
**GREENVILLE COUNTY**  
**PROBATE COURT**

STATE OF SOUTH CAROLINA

COUNTY OF GREENVILLE

IN THE MATTER OF: STANFORD W. GRIST

\_\_\_\_\_   
an alleged incapacitated individual.

April 7, 2022

IN THE PROBATE COURT

CASE NUMBER: 2020-GC-2300136 - \_\_\_\_\_

**ADDENDUM TO GUARDIAN AD LITEM REPORT**

A wellness visit was made to the current residence of Dr. Stanford W. Grist, 900 Old Highway 25 South, Traveler's Rest, SC 29690, on March 30, 2022 at 1pm. This was for the purpose of ensuring Dr. Grist was being taken care of and his needs were being met, in light of the fact that he currently does not have a temporary guardian in place to act on his behalf.

Dr. Grist appeared neat and clean. A long-time caregiver with Comfort Keepers, Ms. Ann Crippen, was present. The residence was neat and clean. Ms. Crippen asked him to take a seat at his table and he needed assistance to find it and be seated. When questioned about the pending court case, he said he did not know anything about it. When questioned who his attorney was, he stated, "I don't know." When questioned if he had requested to retain new counsel, he stated, "I don't know." He was unable to name the names of his children and unable to tell me what he had eaten for lunch. Ms. Crippen stated he had eaten a tuna steak, some rice and vegetables about 20 minutes prior to my arrival. When questioned about what he did for a living before he retired, he stated, "something." When prompted if it had to do with animals, he stated, "I am not sure."

Dr. Grist was apologetic for not remembering. I thanked him for the visit and his time and exited the residence.

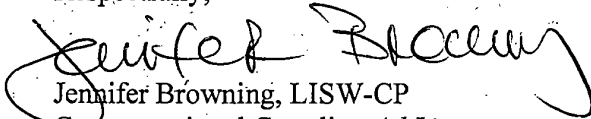
311 Mills Avenue, Greenville, SC 29605 Phone: 864.233.5260 Fax: 864.240.9256

BROWNING  
GERIATRIC CONSULTING

I have included 2 communications with this report. One is an email from Mr. Chris Couchell, the owner of Comfort Keepers, with concerns about Dr. Grist's care and reporting. The second email is from Ms. Amy Stigall, Health Services Coordinator with GalenHealthCareSC. This is in regard to physical therapy and consent for continued therapy.

As the GAL for Dr. Grist, I am concerned that there is not a temporary guardian in place to look out for his best interest, caregivers, medications, health care needs, therapy, and any additional emergency or urgent matters. I would continue to recommend a third-party professional be continued.

Respectfully,

  
Jennifer Browning, LISW-CP  
Court appointed Guardian *Ad Litem*

CC VIA EMAIL:

Mr. Matthew J. Myers  
Mr. Adam Lee  
Mr. Hal Provence  
Mr. Neil Rabon  
Mrs. Tracy Parsons  
Mr. Mike Bridges  
Mrs. Heather Scalzo  
Mr. Tyler Mcleod  
Mrs. Kimberly Thomason  
Mr. John-Paul Baum  
Mr. Devon Puriefey  
Mrs. Crystal Splawn  
Mrs. Brandi Larobardiere

311 Mills Avenue, Greenville, SC 29605 Phone:864.233.5260 Fax: 864.240.9256

## Jennifer Browning

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**From:** Jennifer Browning  
**Sent:** Friday, March 25, 2022 5:20 PM  
**To:** 'Matthew J. Myers'; Dykes, Sheri; Adam Lee; H. Hall Provence; Tyler Mcleod; tracy-parsons@att.net; mbridges@dobsonlaw.com; Adam Lee; Crystal Splawn; Neil Rabon; Heather Scalzo; johnpaul@truluckthomason.com; Devon Puriefoy; kim@truluckthomason.com  
**Cc:** Stacey Grist  
**Subject:** RE: Stanford W Grist

Good afternoon:

Unfortunately, I do not have a definitive answer of whom is legally in charge, as his health care agent, to make legal decisions on Dr. Grist's behalf. Please see the below I received from Comfort Keeper. Best, Jennifer Browning

Hi Jennifer,

I wanted to make you aware of a situation pertaining to Dr. Grist. There was an incident this morning that our caregiver reported to her supervisor. The details are listed below.

- Our caregiver reported that Dr. Grist made sexual advances toward her.
- Our caregiver attempted to re-direct Dr. Grist who then became upset and threw a coffee cup at her.
- Our caregiver then said Dr. Grist proceeded to leave and attempted to jump the gate.
- Our caregiver reported that Dr. Grist made a threat during this time (Dr. Grist threatened to kill her and himself).

Additionally, our nurse visited Dr. Grist on Wednesday, March 23<sup>rd</sup>. During her visit she observed several knives sitting out in the open. She also reported that Dr. Grist keeps a knife in his pocket.

Out of an abundance of caution, we have implemented the following safety protocol.

- Caregivers have been instructed to call 911 if there is an emergency.
- Caregivers have been instructed to call our office if they feel unsafe or threatened during their shift. Our supervisor will determine if we should call 911.
- Caregivers have been instructed to call our office if Dr. Grist is doing anything unsafe and could possibly cause harm to himself. Our supervisor will determine if we should call 911.
- Caregivers have been instructed to report all non-emergency incidents to their supervisor.

Moving forward, the appropriate manager will send you an incident summary email if an incident occurs (emergency or non-emergency).

Please feel free to give me a call if you have any questions or concerns.

Best Regards,

Chris

**Chris Couchell**  
*President*

**Comfort Keepers | Spartanburg - Greenville - Tryon**

Office: (864) 573-2353 | Fax: (864) 309-0932  
791 East Main Street | Spartanburg, SC 29302  
[ComfortKeepers.com](http://ComfortKeepers.com) | [ComfortKeepersFacebook](https://www.facebook.com/ComfortKeepers)



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Jennifer Lewis Browning  
MSW, LISW-CP, CCFC, C-ASWCM  
Licensed and Certified Geriatric Care Manager  
[jenniferbrowning@browninggeriatric.com](mailto:jenniferbrowning@browninggeriatric.com)

Browning Geriatric Consulting, LLC  
311 Mills Avenue  
Greenville, SC 29605  
Office: 864-233-5260 Ext: 201  
Fax: 864-240-9256

To learn more about our services, please visit: <http://www.browninggeriatric.com>



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Please consider the environment before printing this email.

From: Matthew J. Myers <mjm@swblaw.com>  
Sent: Friday, March 25, 2022 10:26 AM  
To: Jennifer Browning <jenniferbrowning@browninggeriatric.com>; Dykes, Sheri <sdykes@greenvillecounty.org>; Adam Lee <alee@dobsonlaw.com>; H. Hall Provence <hprovence@alrlaw.net>; Tyler Mcleod <tmcleod@bmemhlaw.com>; tracy-parsons@att.net; mbridges@dobsonlaw.com; Adam Lee <alee@dobsonlaw.com>; Crystal Splawn <crystals@dobsonlaw.com>; Neil Rabon <nrabon@alrlaw.net>; Heather Scalzo <scalzo@upstatesclaw.com>; johnpaul@truluckthomason.com; Devon Puriefoy <devon@truluckthomason.com>; kim@truluckthomason.com

**Cc:** Stacey Grist <griststacey@gmail.com>

**Subject:** RE: Stanford W Grist

Jennifer, Dr. Grist's most recently executed health care POA named Charlotte Grist Smith as his health care agent (see attached). However, I understand she may not wish to assume that authority.

Alternately, Dr. Grist's most recent financial POA named Stacey Grist as general agent including powers to hire health care and domestic personnel (also attached). Stacey is happy to assist Dr. Grist in with that.

Thank you,

Matthew J. Myers | Member  
Sweeny, Wingate & Barrow, P.A.  
1515 Lady Street, Columbia, SC 29201  
Tel • 803-256-2233 Fax • 803-256-9177

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**From:** Jennifer Browning <jenniferbrowning@browninggeriatric.com>

**Sent:** Friday, March 25, 2022 9:08 AM

**To:** Dykes, Sheri <sdykes@greenvillecounty.org>; Adam Lee <alee@dobsonlaw.com>; H. Hall Provence <hprovence@alrlaw.net>; Matthew J. Myers <mjm@swblaw.com>; Tyler Mcleod <tmcleod@bmemhlaw.com>; tracy-parsons@att.net; mbridges@dobsonlaw.com; Adam Lee <alee@dobsonlaw.com>; Crystal Splawn <crystals@dobsonlaw.com>; Neil Rabon <nrabon@alrlaw.net>; Heather Scalzo <scalzo@upstatesclaw.com>; johnpaul@truluckthomason.com; Devon Puriefoy <devon@truluckthomason.com>; kim@truluckthomason.com

**Subject:** RE: Stanford W Grist

Good morning:

Mr. Chris Couchell with Comfort Keepers has contacted me to request a responsible party that they can report to.

Best, Jennifer



Jennifer Lewis Browning  
MSW, LISW-CP, CCFC, C-ASWCM  
Licensed and Certified Geriatric Care Manager  
jenniferbrowning@browninggeriatric.com

Browning Geriatric Consulting, LLC  
311 Mills Avenue  
Greenville, SC 29605  
Office: 864-233-5260 Ext: 201  
Fax: 864-240-9256

To learn more about our services, please visit: <http://www.browninggeriatric.com>



AGING LIFE CARE ASSOCIATION

MEMBER

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**From:** Dykes, Sheri <[sdynes@greenvillecounty.org](mailto:sdynes@greenvillecounty.org)>

**Sent:** Wednesday, March 23, 2022 10:30 AM

**To:** Adam Lee <[alee@dobsonlaw.com](mailto:alee@dobsonlaw.com)>; Jennifer Browning <[jenniferbrowning@browninggeriatric.com](mailto:jenniferbrowning@browninggeriatric.com)>; H. Hall Provence <[hprovence@alrlaw.net](mailto:hprovence@alrlaw.net)>; Matthew J. Myers <[mjm@swblaw.com](mailto:mjm@swblaw.com)>; Tyler Mcleod <[tmcleod@bmemhlaw.com](mailto:tmcleod@bmemhlaw.com)>; [tracy-parsons@att.net](mailto:tracy-parsons@att.net); [mbridges@dobsonlaw.com](mailto:mbridges@dobsonlaw.com); Adam Lee <[alee@dobsonlaw.com](mailto:alee@dobsonlaw.com)>; Crystal Splawn <[crystals@dobsonlaw.com](mailto:crystals@dobsonlaw.com)>; Neil Rabon <[nrabon@alrlaw.net](mailto:nrabon@alrlaw.net)>; Heather Scalzo <[scalzo@upstatesclaw.com](mailto:scalzo@upstatesclaw.com)>; [johnpaul@truluckthomason.com](mailto:johnpaul@truluckthomason.com); Devon Puriefoy <[devon@truluckthomason.com](mailto:devon@truluckthomason.com)>; [kim@truluckthomason.com](mailto:kim@truluckthomason.com)

**Subject:** Stanford W Grist

**Importance:** High

Judge Jennings would like a status update on the Grist matter. Do you need available dates for a hearing?

*Sheri Dykes*

Litigation Specialist

Guardianship / Conservatorship

(864) 467-7404

[sdynes@greenvillecounty.org](mailto:sdynes@greenvillecounty.org)

301 University Ridge, Suite 1200

Greenville, SC 29601-4702

Fax (864) 467-7198

**Please be sure you are using our most current forms which can be found at [www.greenvillecounty.org/probate](http://www.greenvillecounty.org/probate)**

If I have been of assistance to you, please take this survey and mention my name.

<https://www.greenvillecounty.org/apps/survey/probatesurvey/>

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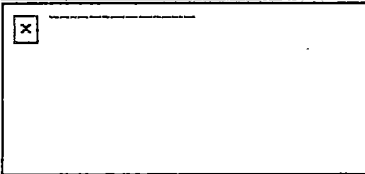
## Jennifer Browning

---

**From:** Amy Stigall <amy@galenhealthcaresc.com>  
**Sent:** Monday, March 28, 2022 9:10 AM  
**To:** Tracy Parsons  
**Cc:** Jennifer Browning  
**Subject:** Re: Grist

Thank you!! We will put this on Mr. Grist's chart.

Amy Stigall  
Health Services Coordinator  
Ph: (864) 520-2836 Ext 104  
Fax: (864) 469 5262  
[amy@galenhealthcaresc.com](mailto:amy@galenhealthcaresc.com)



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On Mon, Mar 28, 2022 at 9:04 AM <[tracy-parsons@att.net](mailto:tracy-parsons@att.net)> wrote:

Dear Amy:

My temporary order for Dr. Stanford Grist has expired and the parties have not consented to an extension. Please remove my name from all contact information for Dr. Grist. I am not sure exactly who will take over or when. I am copying Jennifer Browning, the current GAL for Dr. Grist

Thank you.

Tracy C. Parsons, LPC

(864)414-5553

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\*\*\*\*\*



**FILED**  
AUG 11 2022  
GREENVILLE COUNTY  
PROBATE COURT

STATE OF SOUTH CAROLINA

COUNTY OF GREENVILLE

IN THE MATTER OF: STANFORD W. GRIST

\_\_\_\_\_

an alleged incapacitated individual.

August 8, 2022

IN THE PROBATE COURT

CASE NUMBER: 2020-GC-2300136\_\_-\_\_\_\_\_

**ADDENDUM TO GUARDIAN AD LITEM REPORT**

I received a phone call from Mr. Couchell this morning with Comfort Keepers that Mrs. Ann Crippen, a primary caregiver for Dr. Grist, was not able to go to her scheduled shift this morning because she was positive for COVID. An hour later, I received a phone call from Mr. Couchell to state that Mrs. Crippen had terminated her position with Comfort Keepers. I contacted Greer ER to get a status update on Dr. Grist and was informed to fax my GAL order. Upon receipt, the case manager, Tracy Nigell, contacted me to state that Dr. Grist had been discharged home by Stacy Grist at approximately 10:30 am. She further stated that First Light Home Care would be providing one caregiver, Comfort Keepers would be providing a second caregiver, and Interim Home Health for PT/OT had been ordered. I requested records and was informed I would need to request those through medical records for any d/c medications or other case notes.

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I contacted First Light Home Care. The operating manager, Letty Sanchez, stated that they had been contracted by Stacy Grist to provide in-home care and would provide 2 caregivers Sunday to Sunday from 8p-8a and one caregiver from 8a to 8p. She stated that another agency was involved called, "Comfort Keepers," that would provide the second caregiver. I could neither confirm nor deny their agency support but could not guarantee that this agency would continue to remain involved. The fee per caregiver was 28/hour for First Light. Mileage is charged if the caregiver needs to complete medical appointments or errands.

I made a visit to the residence of Dr. Grist. Anne Crippen was present along with a caregiver from First Light, Theresa. She stated her work shift would be M/T/W from 8a-8p. Upon arrival, Ann was hesitant to let me in, but did. Dr. Grist was placed in a recliner in the dining room area. He had on a blanket and appeared not to have on any other clothes on, other than a brief. When I questioned Mrs. Crippen for whom she was now working, since she was not employed with Comfort Keepers as of this morning, she stated, "I am not working for anyone." When questioned if she was working for free, she stated, "I did not say that; I said I am not working for anyone." Neither caregivers nor Dr. Grist were wearing masks. I wore a mask and did a COVID screening prior to my visit.

Per Mrs. Crippen, Dr. Grist was eating dinner and taking some bites. He had a cut up sandwich present. He was drinking, "as much as they can get him to drink." I reviewed Dr. Grist's bedroom, and a hospital bed was not present. I also questioned about transfers and getting Dr. Grist safely from his recliner to his bedroom. I was informed that there was not a wheelchair, but one would be coming soon. Also, Dr. Grist is non-weight bearing and unable to pivot, thus he must be carried when transferred. He is incontinent and non-ambulatory.

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The logo for Browning Geriatric Consulting features the letters 'BG' in a large, light gray, serif font. Overlaid on this is the word 'BROWNING' in a smaller, dark gray, serif font, and below it, the words 'GERIATRIC CONSULTING' in an even smaller, dark gray, serif font.

# BROWNING GERIATRIC CONSULTING

I will forward the email communication from Mr. Couchell with Comfort Keepers to me in another email with the contract signed by Stacy Grist for services. At this time, Comfort Keepers has not received notification from anyone with the authority to do so, to end services and requires a 2- week notice. Per Mr. Couchell several caregivers contacted him that were scheduled for shifts this week who stated they were contacted by, "someone," to state that they were not needed for shifts and another agency was in place. Further, due to the non-compete clause in Comfort Keeper's contract, Dr. Grist will be billed 12,500.00 on his next invoice for breach of non-compete contract for Mrs. Anne Crippen. This fee will continue to be incurred, per Mr. Couchell, for any other employed caregiver that leaves to work for someone else for the benefit of Dr. Grist.

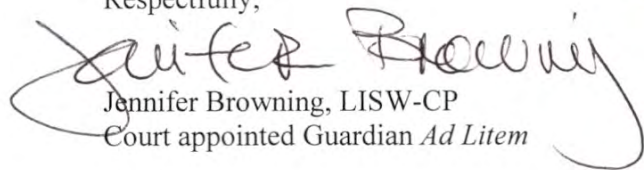
I have several concerns:

1. Dr. Grist does not have the appropriate DME at his home, currently for his safety, including a hospital bed and transport chair, or other wheelchair. In the event of a fire, I am concerned about safe evacuation.
2. Per Mrs. Parsons, at one point it was taking 3 caregivers to manage Dr. Grist in the hospital. At present, I am unsure of his confirmed schedule for 2 caregivers during the am shift from 8a-8p.
3. Per report, Dr. Grist does not do well with, "new caregivers." It is my understanding, that Comfort Keepers has done their best to provide the primary caregivers to Dr. Grist to reduce his agitation. For now, First Light will be a new caregiving agency providing new caregivers.
4. I am concerned about the costs associated with Dr. Grist's care at home. A notice has not been sent to Comfort Keepers by someone in authority to cancel their contract, so, Dr. Grist will continue to ensue hourly charges per the signed contract for 2 weeks out, until such notice is received. First Light charges 28.00 per hour verses 25.00 per hour for Comfort Keepers. I am looking at the number of 2 caregivers from First Light effective today, 8/8/22, and Comfort Keepers continued billing of 25.00 per hour 24/7 until they receive notice. Even when they receive notice, it will be a two week notice of billing to Dr. Grist. There is also the charge of the non-compete of 12,500.00 billed to his account effective today.
5. Per Tracy with Greer ER, the recommendation for Dr. Grist was to, "go to skilled rehabilitation in a skilled nursing home facility."
6. I am concerned about who will be managing medications and medical appointments for Dr. Grist.

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Respectfully,

  
Jennifer Browning, LISW-CP  
Court appointed Guardian *Ad Litem*

CC VIA EMAIL:

Mr. Matthew J. Myers  
Mr. Adam Lee  
Mr. Hal Provence  
Mr. Neil Rabon  
Mr. Mike Bridges  
Mrs. Heather Scalzo  
Mr. Tyler Mcleod  
Mr. William Fore

311 Mills Avenue, Greenville, SC 29605 Phone:864.233.5260 Fax: 864.240.9256

## Jennifer Browning

---

**From:** Chris Couchell <chrisc@ckupstate.com>  
**Sent:** Monday, August 08, 2022 2:00 PM  
**To:** Jennifer Browning  
**Subject:** Client Care Agreement  
**Attachments:** Grist, Stanford CCA.pdf; Grist, Stanford Pricing and Invoice Policy.pdf

Hi Jennifer,

The signed contract / client care agreement is attached with this email. I have also included a copy of our pricing / cancellation policy. Comfort Keepers has not been notified about cancellation of services.

Best Regards,

Chris

**Chris Couchell**  
*President*

**Comfort Keepers | Spartanburg - Greenville - Tryon**  
**Office:** (864) 573-2353 | **Fax:** (864) 309-0932  
791 East Main Street | Spartanburg, SC 29302  
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# Client Care Agreement

Kiki's Kare LLC dba **Comfort Keepers**  
 Spartanburg, SC 791 E Main Street Suite 5, 29302 P: 864-573-2353  
 Greenville, SC 1200 Haywood Road, 29615 P: 864-268-8993  
 Tryon, NC 2186 Lynn Road STE C, 28722 P: 828-436-1925

No: \_\_\_\_\_

Office hours: 8:45 a.m. - 5:00 p.m. Monday – Friday  
 For after hours and holidays, call the number to the right to reach our on-call services.

|   |                 |                                  |   |
|---|-----------------|----------------------------------|---|
| <b>CLIENT INFORMATION:</b> Client is <input type="checkbox"/> Payor <input type="checkbox"/> Survey Contact   |                 |                                  |   |
| <b>Name (Last, First, MI)</b> Grist, Stanford   |                 | <b>Phone Number</b>              |   |
| <b>Address</b> 900 Old Hwy 25   |                 | <b>ALT Phone Number</b>          |   |
| <b>City</b> Travelers Rest  | <b>State</b> SC | <b>Zip Code</b> 29690            | <b>SS#</b>  |
| <b>Email Address</b>  |                 | <b>Date of Birth</b> 4/12/48     |   |
| <b>CLIENT CONTACT 1:</b> Client Contact 1 is <input type="checkbox"/> Payor <input type="checkbox"/> Survey Contact <input checked="" type="checkbox"/> Emergency Contact <input type="checkbox"/> Back Up Provider   |                 |                                  |   |
| <b>Name (Last, First, MI)</b> Grist, Stacey   |                 | <b>Phone Number</b> 404-849-1129 |   |
| <b>Address</b> 707 east stone ave   |                 | <b>ALT Phone Number</b>          |   |
| <b>City</b> greenville  | <b>State</b> sc | <b>Zip Code</b> 29601            | <b>SS#</b>  |
| <b>Email Address</b> Griststacey@gmail.com  |                 | <b>Relationship</b> Daughter     |   |
| <b>CLIENT CONTACT 2:</b> Client Contact 2 is <input type="checkbox"/> Payor <input type="checkbox"/> Survey Contact <input type="checkbox"/> Emergency Contact <input type="checkbox"/> Back Up Provider  |                 |                                  |   |
| <b>Name (Last, First, MI)</b> charlotte Grist   |                 | <b>Phone Number</b> 206-920-9833 |   |
| <b>Address</b>  |                 | <b>ALT Phone Number</b>          |   |
| <b>City</b>   | <b>State</b>    | <b>Zip Code</b>                  | <b>SS#</b>  |
| <b>Email Address</b>  |                 | <b>Relationship</b> daughter     |   |
| <p><b>Consent for Service:</b> Comfort Keepers® is authorized to provide services according to the Plan of Care and each subsequent Plan of Care agreed to, and will make reasonable efforts to do so. Client understands that the Plan of Care may change based on Client requests and service needs. Client agrees to pay Comfort Keepers® for all services rendered at the rate of \$ <u>23.00</u>/hour per hour/day/week/month or as outlined on the attached Rate Sheet. Comfort Keepers® may change the service rates from time to time upon written notice to Payor. <u>Initial SG</u></p>   |                 |                                  |   |
| <p>Comfort Keepers accepts payments via Credit Card, Debit Card, and Electronic Funds Transfer (EFT). Comfort Keepers may require an advanced payment for services. By signing the Client Care Agreement, client and payor agree that the payment information provided will be charged for services on a <u>biweekly</u> basis through a third party payment processor. <u>SG</u> Initial</p>   |                 |                                  |   |
| <p>I understand Comfort Keepers may utilize e-visit verification through telephony time tracking services or location services via a mobile app for tracking time of Caregivers and other Comfort Keepers employees at the client's location. I agree that the arrival and departure times recorded using the above-mentioned systems is the official record of the hours of services provided to me and is the basis for the charges I must pay for services. I authorize Comfort Keepers to utilize the telephony records or mobile app records, which may or may not include a voice statement, as my electronic signature for the purposes of verifying care logs. If needed and confirmed by Client or authorized party, I authorize Comfort Keepers administrative staff to upload my electronic signature for the purpose of verifying care logs when signing at the time of services is not possible. I authorize and acknowledge my electronic signature is binding and is equal to my physical signature. <u>SG</u> Initial</p> |                 |                                  |   |
| <p>Advance Directive for Health Care: I <input type="checkbox"/> DO <input type="checkbox"/> DO NOT have an Advance Directive. POA _____<br/>                 Do NOT Resuscitate (DNR) orders are located: _____</p>  |                 |                                  |   |
| <p>I acknowledge and understand all information that was provided and explained to me and agree to the terms and conditions above, on the reverse side of this agreement and on any attachments. I authorize release of my information for coordination of health and support services during time of services with Comfort Keepers. I have received information about how to use the Comfort Keepers® complaint process and the NOTICE OF PRIVACY PRACTICES as required by the Health Insurance Portability and Accountability Act of 1996 (HIPAA). If signing as a backup service provider, I acknowledge that in the event of an emergency/disaster I am responsible for the client. I acknowledge I have received, understand and agree to the following paperwork: Client Rights and Responsibilities; HIPAA/Privacy Practices; Information on Advanced Directives, Release of Information Authorization, and the following:</p>   |                 |                                  |   |
| <b>Signed</b> <u>[Signature]</u>  | 8/27/2020       | 3:28 PM CDT                      | <b>Signed</b> <u>Christie Snyder</u> 8/27/2020   4:20 |
| Client or Authorized Rep Signature  | Date            |                                  | Comfort Keepers Representative Signature Date         |
| <b>Signed</b> _____   | _____           |                                  | <b>Signed</b> _____                                   |
| Payor Signature   | Date            |                                  | Back Up Service Provider Signature Date               |

1. The Client and the Payor agree to the terms set forth in this Agreement. References in this Agreement to services provided to "the Client" mean services provided to the individual listed on the reverse side of this page as the Client; otherwise, references in this Agreement to "the Client" shall mean, jointly and severally the Client and the Payor, both as designated on the reverse side of this page.
2. The Client acknowledges that the Comfort Keepers® office listed on the reverse side of this page (referred to as "Comfort Keepers" in this Agreement) is an independently owned and operated franchised business.
3. Either the Client or Comfort Keepers may cancel this Agreement at any time by providing the other party at least two (2) weeks' prior written notice of the cancellation; but Comfort Keepers may cancel this Agreement without prior notice under the conditions set forth in the Client Conduct, Rights, and Responsibilities form provided to Client. If the Client does not provide Comfort Keepers at least two (2) weeks' prior written notice of the cancellation, Comfort Keepers has the right to retain all payments previously made by the Client, as partial compensation to Comfort Keepers for its losses and damages, including, but not limited to, forgone business opportunities and expenses that Comfort Keepers had incurred in preparing for the services it was to provide to the Client.
4. If the Client fails to pay timely Comfort Keepers in full for the services that Comfort Keepers provided to the Client, the Client will pay Comfort Keepers, in addition to the amounts owed, all reasonable costs and expenses that Comfort Keepers incurs to collect past due amounts, including, but not limited to, court costs, collection fees, attorneys' fees, and interest at the maximum rate permitted by law. The Client further agrees that if the Client fails to pay timely Comfort Keepers in full for the services that Comfort Keepers provided to the Client, Comfort Keepers may refuse to provide any further services to the Client until the past due amounts are paid in full.
5. The Client acknowledges that Comfort Keepers employees who are not providing nursing services under the Plan of Care are not qualified or authorized to provide any medical services to the Client. The Client further acknowledges that if a medical emergency arises while any Comfort Keepers employee is providing services to the Client or is otherwise present, that employee will not provide any medical services to the Client, but the employee may call 911 for emergency assistance. The Client agrees to hold harmless Comfort Keepers and its employee for any emergency medical or other care that the employee may provide to the Client, including care provided based on instructions given by any 911 service provider. Unless Comfort Keepers is expressly providing private duty nursing services, Comfort Keepers will not administer or provide any medication and will be limited to solely providing verbal reminders to take medication and assistance opening containers.
6. The Client agrees not to hold Comfort Keepers or its employees responsible for any physical loss or damage to, or loss of use of, any of the Client's property while outside the care or control of a Comfort Keepers employee. The Client will not hold Comfort Keepers or its employees responsible for any bodily injury to the Client if the Client fails to follow the employee's instructions and/or the injury occurs while the Client is not in the presence of the employee. The Client further agrees not to hold Comfort Keepers or its employees responsible for any bodily injury, property damage, fire, theft, collision or public liability claims arising out of the operation of a motor vehicle that is not being operated or controlled by a Comfort Keepers employee.
7. If the Client needs to make any changes to the Plan of Care or Payor information, the Client will notify the Comfort Keepers office directly, as soon as the Client becomes aware of the changes. Requests for additional services or hours will be accommodated based on caregiver availability. If the Client requests a reduction of services or hours after a caregiver receives the schedule, the Client will pay for the hours as scheduled.
8. The Client will not, directly or indirectly, or through family or other persons, obtain or seek to obtain the personal phone number or address of any Comfort Keepers employee. Furthermore, the Client will not, directly or indirectly, or through family or other persons, contact or discuss with a Comfort Keepers employee or any of the employee's family members any matters related to this Agreement, including, but not limited to, the Client's care requirements, schedule arrangements, payments or invoices or employee compensation, without first obtaining written permission from Comfort Keepers.
9. The Client acknowledges that Comfort Keepers has a substantial investment in recruiting, hiring, training and retaining its employees in order to develop and maintain the unique skill set required for the performance of their job duties. The Client agrees that during the term of this Agreement and for a period of one (1) year from the last day that the Client stops utilizing Comfort Keepers' services, the Client will not, directly or indirectly through family, or through any other person, company or agency, utilize or hire any Comfort Keepers employee or former Comfort Keeper employee. In addition, for the same period of time, the Client agrees not to, directly or indirectly through family or any other person, induce any Comfort Keepers employee to leave his/her employment with Comfort Keepers. The Client acknowledges that Comfort Keepers employees who provide services directly to clients have entered into non-competition agreements (not applicable in all states) with Comfort Keepers. If the Client, in violation of this Agreement, directly or indirectly through family, or through any other person, company or agency, utilizes or hires any Comfort Keepers employee, then Comfort Keepers may seek its losses and damages from the Client in a court of competent jurisdiction. Comfort Keepers may also seek such losses and damages if the Client, directly or indirectly through family or any other person, company, or agency, induces any Comfort Keepers employee to leave his/her employment with Comfort Keepers.
10. The Client and Comfort Keepers acknowledge that it would be difficult to estimate Comfort Keepers' actual losses and damages if the Client breaches the obligations set forth in the preceding two (2) paragraphs. Therefore, if the Client breaches any of those obligations, THE CLIENT WILL PAY TO COMFORT KEEPERS \$12,500 AS LIQUIDATED DAMAGES FOR EACH EMPLOYEE OR FORMER EMPLOYEE THE CLIENT UTILIZES, HIRES, OR INDUCES TO LEAVE HIS/HER EMPLOYMENT, PLUS ALL REASONABLE COSTS THAT COMFORT KEEPERS INCURS IN COLLECTING SUCH AMOUNT, INCLUDING, BUT NOT LIMITED TO ITS COLLECTION FEES AND LEGAL FEES (INCLUDING ATTORNEY FEES). The Client and Comfort Keepers agree that this amount represents a reasonable amount and the parties' best estimate of Comfort Keepers' expected actual losses and damages, including, but not limited to, the cost that Comfort Keepers expended in recruiting, hiring, training and retaining the employee or the employee's replacement, as well as forgone business opportunities and other incidental and consequential damages. The Client acknowledges that this amount is not a penalty. THE CLIENT AUTHORIZES COMFORT KEEPERS TO CHARGE THE CLIENT'S CREDIT CARD FOR THESE LIQUIDATED DAMAGES, NOTWITHSTANDING ANY OTHER NOTICES OR OTHER DIRECTIONS THAT THE CLIENT MAY HAVE GIVEN COMFORT KEEPERS. This paragraph, the preceding two (2) paragraphs, and the credit card authorization on the other side of this Agreement (for purposes of this provision only), survive the termination of this Agreement.
11. The Client will not entrust a Comfort Keepers employee with unattended premises or any part thereof. Additionally, the Client will secure all valuables, including, but not limited to, cash and negotiable instruments, and the Client will not entrust a Comfort Keepers employee with the same, without first obtaining Comfort Keepers' written permission, and then only when the Comfort Keepers employee's specific duties necessitate such activities.
12. The Client agrees that any claims made under Comfort Keepers' fidelity bond or crime insurance must be made in writing by the Client within ten (10) days of the occurrence.
13. This Agreement is severable. If a court declares any provision of this Agreement void or invalid, all other provisions of this Agreement remain binding and enforceable.
14. This Agreement and the obligations and rights of the parties set forth in the Agreement cannot be assigned without the written consent of the other party. This Agreement will be binding upon and inure to benefit of Client and the Client's heirs and assigns and Comfort Keepers and its successors and assigns.
15. No waiver of a default by either party will operate as a waiver of any future defaults, whether or not of a like nature.
16. All provisions of this Agreement that, by their terms or by reasonable implication, are intended to survive this Agreement and shall survive termination of this Agreement.
17. Any dispute between the parties or any claims arising from or in connection with this Agreement shall be governed by and construed in accordance with the laws of the state where Comfort Keepers is located and shall be brought in the state or federal judicial district where Comfort Keepers is located.
18. This Agreement, its attachments, and the Plan of Care are the complete understanding of the parties and no other promise or understanding is of any effect. No change to this Agreement may be made informally or orally and all changes to this Agreement except for changes to service rates, must be made in a writing signed by the parties. Amended or new Plans of Care become part of this Agreement.
19. The Client acknowledges that as of the time this Agreement was entered into, there existed several other in-home care providers from which Client could obtain services of the kind set forth in this Agreement. The Client acknowledges they had the right to have a lawyer review this Agreement prior to signing.

Client or Authorized Signature: \_\_\_\_\_

Date: 8/27/2020 | :



## Pricing & Invoicing Policy

### Caregiving

|  |                  |
|--|------------------|
| Hourly Preferred Rate*(3 Hour Minimum) ----- | \$23.00 per hour |
| Hourly Rate (Less Than 3 Hours) -----        | \$45.00 per hour |
| Hourly Rate (Couples*) -----                 | \$36.00 per hour |
| Weekend Only Rate* (3 Hour Min) -----        | \$26.00 per hour |

\*Hourly preferred rate applies to clients who agree to ACH (EFT Payments). If not paying via ACH the hourly rate will be \$24.00 per hour. Paying via check will require a \$1,000.00 deposit.

\*Couples Hourly Rate applies when two members of a household require hands-on personal care

\*Weekend Only Rate applies when services are used only between the hours of Saturday 12:00a – Sunday 11:59pm

### Changing Care Needs

- As care needs expand or decrease, services such as personal care, nursing services, transportation in a Comfort Keeper’s car, and the like, will be charged per the included fee schedule. We make every effort to maintain constant communication with our clients, families and caregivers to keep everyone updated on care changes. Clients will be informed of any fee changes in advance.

### Mileage for Errands & Transportation to Appointments in CLIENT’s Vehicle ----- \$ No Charge

- Client must maintain automobile insurance which allows other persons to drive their vehicle.

### Mileage for Errands & Transportation to Appointments in Comfort Keepers Vehicle ----- \$.65 per mile

- Rate will vary with IRS mileage reimbursement rate and includes a minimal surcharge to cover agency costs.

### Rates Include the Following for All Our Services As Well As Office Staff ----- \$ No Charge

- On-going supervision and coordination of care.
- Continuing education and case-specific training of caregivers to meet client needs
- Comfort Keepers is fully licensed by DHEC.
- Bonding and proper liability insurance for your protection.
- Comprehensive background investigation of criminal, driving and employment records and reference checks.
- Workers’ Compensation Insurance so any injury that might occur in a client’s home will not place the client in financial jeopardy.
- Payment of all payroll taxes such as FICA, Medicare, Income Tax, Unemployment Taxes and the like will be paid to all applicable Federal, State and Local taxing authorities so clients will not have to bear this legal responsibility.

I have reviewed and accept both pages of the Comfort Keepers Pricing and Invoicing Policy.

Signature: \_\_\_\_\_ Date: 8/27/2020 | 3:38 PM CDT



**Nursing Visits (RN, LPN)**

**One (1) Hour ----- \$125.00 per hour**

- Nursing Services include medication management, filling, drawing up and/or mixing insulin syringes for future injections, medication boxes, care management, Ostomy and Catheter care, dressing changes, Client / Family training, bowel program, venous blood draws, administer tube feedings and more.
- Multiple nurse visits may be required to ensure quality care and maintain DHEC compliance.

**Nursing Assessment and Development of Initial Plan of Care ----- \$225.00 per visit**

- Does **NOT** apply to non-medical services. Includes Long Term Care (LTC) assessments.

**Nursing Services Delegated to Caregivers ----- \$36.00 per hour**

- **Includes:** Ostomy hygiene, Catheter hygiene, Bowel program, Non-invasive wound care, administer pre-filled insulin syringes, Diabetic care and other Private Duty Nursing Services as needed.

**Payment Terms / Additional Fees / Cancellation Policy\***

**Comfort Keepers accepts the following form of payment:**

- Electronic Funds Transfer (EFT) Automatic Bill Pay

**Insufficient Funds / Denied Transaction Fees ----- \$ 25.00 per incident**

**Shift Cancellation Policy ----- \$ Charge Applies**

- 24-hour notice required to cancel previously scheduled shifts to avoid applied charge
- Clients are required to pay for all shifts occurring within 24 hours of notification. The current fee schedule applies.
- Included in this policy is dismissing caregiver(s) prior to the conclusion of their shift. Client will be billed for the entire scheduled shift.

**Cancellation of Services ----- \$ Charge Applies**

- 2-week notice required for cancellation of services
- Clients are required to pay for 2 weeks of scheduled services if a 2-week notice is not given. The current fee schedule applies.

**Holiday Rates for Caregiving & PDN Services ----- \$ Double Rate**

- Comfort Keepers pays double time on holidays (New Year’s Eve, New Year’s Day, Easter, Memorial Day, Independence Day, Labor Day, Thanksgiving, Christmas Eve, and Christmas Day). We will never assume you need service on a holiday. Instead, we will contact you 1-2 weeks in advance to discuss your plans and service needs. If your regular schedule does not fall on a holiday, you will not be contacted.

**Overtime Policy Services ----- \$ Hourly Rate x 1.5**

- Requests to keep the same caregiver for more than 40 hours in each week will result in a charge of 1.5X the current bill rate.



## Greenville County 13th Judicial Circuit Public Index



[Greenville County Home Page](#) [South Carolina Judicial Department Home Page](#)

Switch View





### Stacey Grist , plaintiff, et al vs. Priscilla Mickie Grist , defendant, et al

|                             |               |                          |   |                           |            |
|-----------------------------|---------------|--------------------------|---|---------------------------|------------|
| <b>Case Number:</b>         | 2022CP2304055 | <b>Court Agency:</b>     | Greenville County Common Pleas            | <b>Filed Date:</b>        | 08/01/2022 |
| <b>Case Type:</b>           | Common Pleas  | <b>Case Sub Type:</b>    | Person Inj/Other 399                      | <b>File Type:</b>         | Jury       |
| <b>Status:</b>              | Appeal        | <b>Assigned Judge:</b>   | Clerk Of Court C P, G S, And Family Court |                           |            |
| <b>Disposition:</b>         |               | <b>Disposition Date:</b> |   | <b>Disposition Judge:</b> |            |
| <b>Original Source Doc:</b> |               | <b>Original Case #:</b>  |   |                           |            |
| <b>Judgment Number:</b>     |               | <b>Court Roster:</b>     |   |                           |            |

**Case Parties**   **Judgments**   **Tax Map Information**   **Associated Cases**   **Actions**   **Financials**





| Name                       | Description   | Type   | Motion Roster | Begin Date       | Completion Date | Documents |
|----------------------------|---|--------|---------------|------------------|-----------------|-----------|
| Kikis Kare LLC             | NEF(05-05-2025 06:20:53 PM)<br>Memo/Memo in Support         | Filing |               | 05/06/2025-08:31 |                 |           |
| Kikis Kare LLC             | Memo/Memo in Support  | Filing |               | 05/05/2025-18:20 |                 |           |
| Grist, Stacey              | NEF(05-05-2025 04:45:57 PM)<br>Order/Electronic Form 4      | Filing |               | 05/05/2025-16:46 |                 |           |
| Grist, Stacey              | Order/Electronic Form 4-Stay                                | Order  |               | 05/05/2025-16:45 |                 |           |
| Grist, Stacey              | NEF(05-02-2025 10:17:42 AM)<br>Memo/Memo in Opposition      | Filing |               | 05/02/2025-11:36 |                 |           |
| Grist, Stacey              | Memo/Memo in Opposition                                     | Filing |               | 05/02/2025-10:17 |                 |           |
| Ballard, Desa              | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |
| Hubbard, Haley Alyse       | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |
| Moose, Julie Jeffords      | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |
| Ferguson, Jessica Shultz   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |
| Clark, Chelsea Jaqueline   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |
| Pavlicek, Jacqueline Marie | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |
| Flowers, Jacob A           | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |               | 04/28/2025-16:18 |                 |           |








|                            |  |        |  |                  |                  |  |
|----------------------------|--|--------|--|------------------|------------------|--|
| Barlow, Thomas Kennedy     | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 04/28/2025-16:18 |                  |  |
| Peele, Robert McNair III   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 04/28/2025-16:18 |                  |  |
| Brudvig, Kelsey Jan        | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 04/28/2025-16:18 |                  |  |
| Puriefoy, Devon Marc       | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 04/28/2025-16:18 |                  |  |
| Thomason, Kimberly Truluck | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 04/28/2025-16:18 |                  |  |
| Grist, Stacey              | NEF(04-10-2025 12:00:50 PM) Motion/Stay                      | Filing |  | 04/10/2025-14:05 |                  |  |
| Grist, Stacey              | Plt's/Motion to Stay   | Motion |  | 04/10/2025-12:00 | 05/05/2025-12:00 |  |
| Grist, Stacey              | NEF(02-27-2025 03:59:09 PM) Appeal/Notice of Appeal to C...  | Filing |  | 02/27/2025-16:30 |                  |  |
| Grist, Stacey              | Appeal/Notice of Appeal to Court of Appeals                  | Filing |  | 02/27/2025-15:59 |                  |  |
| Grist, Stacey              | Service/Proof Of   | Filing |  | 02/27/2025-15:59 |                  |  |
| Grist, Stacey              | NEF(02-27-2025 12:33:57 PM) Appeal/Notice of Appeal to C...  | Filing |  | 02/27/2025-13:15 |                  |  |
| Grist, Stacey              | NEF(02-27-2025 12:27:43 PM) Appeal/Notice of Appeal to C...  | Filing |  | 02/27/2025-12:47 |                  |  |
| Grist, Stacey              | Appeal/Notice of Appeal to Court of Appeals                  | Filing |  | 02/27/2025-12:33 |                  |  |
| Grist, Stacey              | Service/Affidavit Of Service on Browning Geriatrics Consulti | Filing |  | 02/27/2025-12:33 |                  |  |
| Grist, Stacey              | NEF(02-27-2025 12:25:38 PM) Notice/Notice of Appearance      | Filing |  | 02/27/2025-12:28 |                  |  |
| Grist, Stacey              | Appeal/Notice of Appeal to Court of Appeals                  | Filing |  | 02/27/2025-12:27 |                  |  |
| Grist, Stacey              | Service/Affidavit Of Service on Kikis Kare LLC               | Filing |  | 02/27/2025-12:27 |                  |  |
| Grist, Stacey              | Service/Affidavit Of Service on Comfort Keepers              | Filing |  | 02/27/2025-12:27 |                  |  |
| Grist, Stacey              | Service/Affidavit Of Service on Erin Couchell                | Filing |  | 02/27/2025-12:27 |                  |  |
| Grist, Stacey              | Service/Affidavit Of Service on Kikis Kare                   | Filing |  | 02/27/2025-12:27 |                  |  |
| Grist, Stacey              | Service/Affidavit Of Service on Chris Couchell               | Filing |  | 02/27/2025-12:27 |                  |  |
| Grist, Stacey              | Notice/Notice of Appearance                                  | Filing |  | 02/27/2025-12:25 |                  |  |
| Collins, Daniel A          | Order/Protection from Discovery                              | Order  |  | 02/21/2025-15:53 |                  |  |
| Collins, Daniel A          | NEF(02-21-2025 03:53:47 PM) Order/Protection from Discov...  | Filing |  | 02/21/2025-15:52 |                  |  |
| Collins, Daniel A          | NEF(02-12-2025 07:29:32 PM) Proposed Order/Protection fr...  | Filing |  | 02/13/2025-09:18 |                  |  |


|                            |   |        |  |                  |  |   |
|----------------------------|---|--------|--|------------------|--|---|
| Collins, Daniel A          | Order/Order Cover Sheet \$25.00                             | Filing |  | 02/12/2025-19:29 |  |   |
| Kikis Kare LLC             | NEF(02-11-2025 03:39:23 PM)<br>Order/Electronic Form 4      | Filing |  | 02/11/2025-15:39 |  |  |
| Kikis Kare LLC             | Order/Electronic Form 4-Plt's Motion Denied                 | Order  |  | 02/11/2025-15:39 |  |  |
| Thomason, Kimberly Truluck | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Puriefoy, Devon Marc       | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Brudvig, Kelsey Jan        | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Peele, Robert McNair III   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Barlow, Thomas Kennedy     | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Flowers, Jacob A           | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Clark, Chelsea Jaqueline   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Pavlicek, Jacqueline Marie | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Moose, Julie Jeffords      | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Ferguson, Jessica Shultz   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Ballard, Desa              | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 02/07/2025-09:13 |  |   |
| Grist, Stacey              | NEF(02-05-2025 12:25:44 PM)<br>Motion/Alter and/or Amend    | Filing |  | 02/05/2025-13:08 |  |  |
| Grist, Stacey              | Plt's/Motion to Alter and/or Amend                          | Motion |  | 02/05/2025-12:25 |  |  |
| Ballard, Desa              | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Moose, Julie Jeffords      | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Clark, Chelsea Jaqueline   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Ferguson, Jessica Shultz   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Flowers, Jacob A           | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Pavlicek, Jacqueline Marie | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Barlow, Thomas Kennedy     | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Peele, Robert McNair III   | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |
| Brudvig, Kelsey Jan        | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |  |   |

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|----------------------------|---|--------|--|------------------|------------------|--|
| Puriefoy, Devon Marc       | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |                  |  |
| Thomason, Kimberly Truluck | 5/5/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 01/31/2025-16:31 |                  |  |
| Kikis Kare LLC             | NEF(01-30-2025 05:22:58 PM) Motion/Summary Judgment         | Filing |  | 01/31/2025-08:58 |                  |  |
| Kikis Kare LLC             | Def's/Motion for Summary Judgment                           | Motion |  | 01/30/2025-17:22 | 05/05/2025-17:22 |  |
| Grist, Priscilla Mickie    | NEF(01-30-2025 08:37:31 AM) Order/Electronic Form 4         | Filing |  | 01/30/2025-08:37 |                  |  |
| Grist, Priscilla Mickie    | Order/Electronic Form 4                                     | Order  |  | 01/30/2025-08:37 |                  |  |
| Grist, Priscilla Mickie    | NEF(01-30-2025 08:37:10 AM) Order/Electronic Form 4         | Filing |  | 01/30/2025-08:37 |                  |  |
| Kikis Kare LLC             | NEF(01-30-2025 08:36:52 AM) Order/Electronic Form 4         | Filing |  | 01/30/2025-08:37 |                  |  |
| Grist, Priscilla Mickie    | Order/Electronic Form 4                                     | Order  |  | 01/30/2025-08:37 |                  |  |
| Kikis Kare LLC             | Order/Electronic Form 4                                     | Order  |  | 01/30/2025-08:36 |                  |  |
| Comfort Keepers            | NEF(01-29-2025 04:05:48 PM) Order/Electronic Form 4         | Filing |  | 01/29/2025-16:06 |                  |  |
| Comfort Keepers            | Order/Electronic Form 4                                     | Order  |  | 01/29/2025-16:05 |                  |  |
| Grist, Stacey              | NEF(01-16-2025 03:43:40 PM) Motion/Alter and/or Amend       | Filing |  | 01/16/2025-16:09 |                  |  |
| Grist, Stacey              | Plts Motion/Alter and/or Amend                              | Motion |  | 01/16/2025-15:43 |                  |  |
| Grist, Stacey              | Plts Motion/Alter and/or Amend                              | Motion |  | 01/16/2025-15:43 |                  |  |
| Grist, Stacey              | Plts Motion/Alter and/or Amend                              | Motion |  | 01/16/2025-15:43 |                  |  |
| Grist, Stacey              | Memo/Memo in Support  | Filing |  | 01/16/2025-15:43 |                  |  |
| Grist, Stacey              | Memo/Memo in Support  | Filing |  | 01/16/2025-15:43 |                  |  |
| Grist, Stacey              | Memo/Memo in Support  | Filing |  | 01/16/2025-15:43 |                  |  |
| Grist, Stacey              | NEF(01-15-2025 02:54:33 PM) Order/Electronic Form 4         | Filing |  | 01/15/2025-14:54 |                  |  |
| Grist, Stacey              | Order/Electronic Form 4                                     | Order  |  | 01/15/2025-14:54 |                  |  |
| Grist, Stacey              | NEF(01-15-2025 11:21:13 AM) Filing/Other                    | Filing |  | 01/15/2025-11:35 |                  |  |
| Grist, Stacey              | Exhibits to Motion  | Filing |  | 01/15/2025-11:21 |                  |  |
| Grist, Priscilla Mickie    | NEF(01-14-2025 03:14:44 PM) Filing/Other                    | Filing |  | 01/14/2025-15:40 |                  |  |
| Grist, Priscilla Mickie    | Exhibits to Motion  | Filing |  | 01/14/2025-15:14 |                  |  |

|                            |   |        |  |                  |  |  |
|----------------------------|---|--------|--|------------------|--|--|
| Kikis Kare LLC             | NEF(01-13-2025 03:33:15 PM)<br>Motion/Reconsider                | Filing |  | 01/14/2025-09:05 |  |  |
| Kikis Kare LLC             | Motion/Reconsider   | Motion |  | 01/13/2025-15:33 |  |  |
| Parson, Tracy              | NEF(01-06-2025 08:58:32 AM)<br>Order/Summary Judgment           | Filing |  | 01/06/2025-08:58 |  |  |
| Parson, Tracy              | Order/Summary Judgment-for Def<br>Tracy Parsons                 | Order  |  | 01/06/2025-08:58 |  |  |
| Browning, Jennifer         | NEF(01-06-2025 08:46:52 AM)<br>Order/Summary Judgment           | Filing |  | 01/06/2025-08:47 |  |  |
| Browning, Jennifer         | Order/Summary Judgment-for Defs<br>Browning & Browning Geriatri | Order  |  | 01/06/2025-08:46 |  |  |
| Kikis Kare LLC             | NEF(01-06-2025 08:44:41 AM)<br>Order/Summary Judgment           | Filing |  | 01/06/2025-08:45 |  |  |
| Kikis Kare LLC             | Order/Summary Judgment-as to<br>Certain Causes of Action        | Order  |  | 01/06/2025-08:44 |  |  |
| Thomason, Kimberly Truluck | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Puriefoy, Devon Marc       | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Brudvig, Kelsey Jan        | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Suggs, Fred W. III         | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Peele, Robert McNair III   | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Dowling, Curtis W.         | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Gerrald, Matthew G.        | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Flowers, Jacob A           | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Pavlicek, Jacqueline Marie | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Price, Vincent Clark       | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Barlow, Thomas Kennedy     | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Moose, Julie Jeffords      | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Ferguson, Jessica Shultz   | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Clark, Chelsea Jaqueline   | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Keeling, Lillian K.H.      | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Ballard, Desa              | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:52 |  |  |
| Ballard, Desa              | 1/13/2025_MOTION_Roster/Notice<br>of Motions Roster Publication | Action |  | 12/17/2024-10:49 |  |  |

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|----------------------------|--|--------|--|------------------|------------------|---|
| Keeling, Lillian K.H.      | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Moose, Julie Jeffords      | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Price, Vincent Clark       | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Ferguson, Jessica Shultz   | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Clark, Chelsea Jaqueline   | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Barlow, Thomas Kennedy     | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Flowers, Jacob A           | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Pavlicek, Jacqueline Marie | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Dowling, Curtis W.         | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Peele, Robert McNair III   | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Gerrald, Matthew G.        | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Suggs, Fred W. III         | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Brudvig, Kelsey Jan        | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Puriefoy, Devon Marc       | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Thomason, Kimberly Truluck | 1/13/2025_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 12/17/2024-10:49 |                  |   |
| Grist, Stacey              | NEF(12-06-2024 02:12:54 PM) Motion/Compel                    | Filing |  | 12/06/2024-14:26 |                  |    |
| Grist, Stacey              | Plt/Stacey Grist Motion/Compel                               | Motion |  | 12/06/2024-14:12 |                  |    |
| Grist, Priscilla Mickie    | NEF(12-05-2024 11:54:18 AM) Filing/Other                     | Filing |  | 12/05/2024-13:39 |                  |    |
| Grist, Priscilla Mickie    | NEF(12-05-2024 11:47:51 AM) Motion/Protection from Disco...  | Filing |  | 12/05/2024-13:37 |                  |    |
| Grist, Priscilla Mickie    | Filing/Other   | Filing |  | 12/05/2024-11:54 |                  |     |
| Grist, Priscilla Mickie    | Motion/Protection from Discovery/Def                         | Motion |  | 12/05/2024-11:47 |                  |    |
| Grist, Stacey              | NEF(12-03-2024 04:35:23 PM) Proposed Order/Summary Judgm...  | Filing |  | 12/03/2024-16:49 |                  |    |
| Grist, Stacey              | Order/Order Cover Sheet \$25.00                              | Filing |  | 12/03/2024-16:35 |                  |   |
| Grist, Stacey              | ADR/Proof of ADR   | Filing |  | 12/02/2024-11:00 | 11/26/2024-11:00 |    |
| Grist, Stacey              | NEF(11-26-2024 10:05:21 AM) Affidavit/Affidavit of           | Filing |  | 11/26/2024-10:43 |                  |    |

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|----------------------------|--|--------|--|------------------|--|---|
| Grist, Stacey              | Affidavit/Affidavit of Stacey Grist In Opposition          | Filing |  | 11/26/2024-10:05 |  |     |
| Grist, Stacey              | Affidavit/Affidavit of Stacey Grist In Opposition          | Filing |  | 11/26/2024-10:05 |  |    |
| Grist, Stacey              | Affidavit/Affidavit of Stacey Grist In Opposition          | Filing |  | 11/26/2024-10:05 |  |    |
| Grist, Stacey              | NEF(11-25-2024 04:32:51 PM) Notice/Notice of Appearance    | Filing |  | 11/25/2024-16:33 |  |    |
| Grist, Stacey              | Notice/Notice of Appearance                                | Filing |  | 11/25/2024-16:32 |  |   |
| Puriefoy, Devon Marc       | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Peele, Robert McNair III   | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Brudvig, Kelsey Jan        | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Suggs, Fred W. III         | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Thomason, Kimberly Truluck | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Keeling, Lillian K.H.      | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Flowers, Jacob A           | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Pavlicek, Jacqueline Marie | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Price, Vincent Clark       | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Clark, Chelsea Jaqueline   | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Ferguson, Jessica Shultz   | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Moose, Julie Jeffords      | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Barlow, Thomas Kennedy     | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Dowling, Curtis W.         | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Gerrald, Matthew G.        | 12/9/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 11/25/2024-10:02 |  |   |
| Browning, Jennifer         | NEF(11-20-2024 08:48:04 AM) Notice/Notice of Appearance    | Filing |  | 11/20/2024-08:48 |  |  |
| Browning, Jennifer         | Notice/Notice of Appearance                                | Filing |  | 11/20/2024-08:48 |  |   |
| Parson, Tracy              | NEF(11-19-2024 10:41:02 AM) Response                       | Filing |  | 11/19/2024-12:52 |  |  |
| Parson, Tracy              | Response To Plaintiffs' Motion To Continue                 | Filing |  | 11/19/2024-10:41 |  |  |
| Grist, Stacey              | NEF(11-15-2024 10:40:24 AM) Motion/Continuance             | Filing |  | 11/15/2024-11:09 |  |  |






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|-----------------------------------|---|---------------|--|-------------------------|--|--|
| <b>Grist, Stacey</b>              | <b>Plts Motion/Continuance</b>                                      | <b>Motion</b> |  | <b>11/15/2024-10:40</b> |  |  |
| <b>Thomason, Kimberly Truluck</b> | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Pavlicek, Jacqueline Marie</b> | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Flowers, Jacob A</b>           | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Clark, Chelsea Jaqueline</b>   | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Ferguson, Jessica Shultz</b>   | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Price, Vincent Clark</b>       | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Moose, Julie Jeffords</b>      | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Puriefoy, Devon Marc</b>       | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Peele, Robert McNair III</b>   | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Suggs, Fred W. III</b>         | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Brudvig, Kelsey Jan</b>        | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Dowling, Curtis W.</b>         | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Gerrald, Matthew G.</b>        | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Barlow, Thomas Kennedy</b>     | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:47</b> |  |  |
| <b>Barlow, Thomas Kennedy</b>     | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Gerrald, Matthew G.</b>        | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Dowling, Curtis W.</b>         | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Peele, Robert McNair III</b>   | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Brudvig, Kelsey Jan</b>        | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Suggs, Fred W. III</b>         | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Puriefoy, Devon Marc</b>       | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Ferguson, Jessica Shultz</b>   | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Moose, Julie Jeffords</b>      | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |
| <b>Price, Vincent Clark</b>       | <b>1/13/2025_MOTION_Roster/Notice of Motions Roster Publication</b> | <b>Action</b> |  | <b>11/05/2024-15:45</b> |  |  |











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|----------------------------|--|--------|--|------------------|--|--|
| Browning, Jennifer         | NEF(10-16-2024 01:25:00 PM) Notice/Other                     | Filing |  | 10/16/2024-13:55 |  |  |
| Browning, Jennifer         | Notice/Other   | Filing |  | 10/16/2024-13:25 |  |  |
| Grist, Stacey              | Memo/Memo in Support   | Filing |  | 10/16/2024-12:55 |  |  |
| Parson, Tracy              | NEF(10-15-2024 05:16:21 PM) Memo/Memo in Support             | Filing |  | 10/16/2024-08:54 |  |  |
| Browning, Jennifer         | NEF(10-15-2024 05:31:52 PM) Notice/Notice of Appearance      | Filing |  | 10/15/2024-17:32 |  |  |
| Browning, Jennifer         | Notice/Notice of Appearance                                  | Filing |  | 10/15/2024-17:31 |  |  |
| Parson, Tracy              | Memo/Memo in Support   | Filing |  | 10/15/2024-17:16 |  |  |
| Grist, Stacey              | NEF(10-15-2024 04:31:59 PM) Memo/Memo in Opposition          | Filing |  | 10/15/2024-16:41 |  |  |
| Grist, Stacey              | Memo/Memo in Opposition                                      | Filing |  | 10/15/2024-16:31 |  |  |
| Parson, Tracy              | NEF(10-15-2024 09:19:54 AM) Memo/Memo in Support             | Filing |  | 10/15/2024-09:39 |  |  |
| Parson, Tracy              | Memo/Memo in Support   | Filing |  | 10/15/2024-09:19 |  |  |
| Grist, Stacey              | NEF(10-14-2024 11:04:35 AM) Affidavit/Affidavit of           | Filing |  | 10/14/2024-11:13 |  |  |
| Grist, Stacey              | Affidavit/Affidavit of                                       | Filing |  | 10/14/2024-11:04 |  |  |
| Browning, Jennifer         | NEF(10-11-2024 02:27:17 PM) Memo/Memo in Support             | Filing |  | 10/11/2024-14:42 |  |  |
| Browning, Jennifer         | Memo/Memo in Support   | Filing |  | 10/11/2024-14:27 |  |  |
| Pavlicek, Jacqueline Marie | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Flowers, Jacob A           | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Simpson, Garrett Miller    | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Puriefoy, Devon Marc       | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Thomason, Kimberly Truluck | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Suggs, Fred W. III         | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Brudvig, Kelsey Jan        | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Peele, Robert McNair III   | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Gerrald, Matthew G.        | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |

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| Provence, Herbert Hall IV  | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Dowling, Curtis W.         | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Barlow, Thomas Kennedy     | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:53 |  |  |
| Barlow, Thomas Kennedy     | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Dowling, Curtis W.         | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Gerrald, Matthew G.        | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Provence, Herbert Hall IV  | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Peele, Robert McNair III   | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Brudvig, Kelsey Jan        | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Suggs, Fred W. III         | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Thomason, Kimberly Truluck | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Puriefoy, Devon Marc       | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Simpson, Garrett Miller    | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Flowers, Jacob A           | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Pavlicek, Jacqueline Marie | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:51 |  |  |
| Flowers, Jacob A           | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Pavlicek, Jacqueline Marie | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Simpson, Garrett Miller    | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Puriefoy, Devon Marc       | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Suggs, Fred W. III         | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Thomason, Kimberly Truluck | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Brudvig, Kelsey Jan        | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Peele, Robert McNair III   | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Provence, Herbert Hall IV  | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |
| Gerrald, Matthew G.        | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |  |  |

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| Dowling, Curtis W.     | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |                  |  |
| Barlow, Thomas Kennedy | 10/15/2024_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 10/10/2024-15:48 |                  |  |
| Browning, Jennifer     | NEF(10-10-2024 09:40:54 AM) Motion/Summary Judgment          | Filing |  | 10/10/2024-10:34 |                  |  |
| Browning, Jennifer     | Def's/Browning's/Motion for Summary Judgment                 | Motion |  | 10/10/2024-09:40 |                  |  |
| Parson, Tracy          | NEF(10-04-2024 02:24:15 PM) Motion/Summary Judgment          | Filing |  | 10/04/2024-15:20 |                  |  |
| Parson, Tracy          | Def/Tracy Parson/Motion for Summary Judgment                 | Motion |  | 10/04/2024-14:24 |                  |  |
| Grist, Stacey          | NEF(09-23-2024 10:04:47 AM) Motion/Alter and/or Amend        | Filing |  | 09/23/2024-13:43 |                  |  |
| Grist, Stacey          | Plt/Stacey Grist/Motion to Alter and/or Amend                | Motion |  | 09/23/2024-10:04 | 10/18/2024-10:04 |  |
| Kikis Kare LLC         | NEF(09-20-2024 10:19:09 AM) Response                         | Filing |  | 09/20/2024-12:38 |                  |  |
| Kikis Kare LLC         | Response In Opposition To Plt's Motion To Alter Or Amend     | Filing |  | 09/20/2024-10:19 |                  |  |
| Kikis Kare LLC         | Notice/Notice of Appearance                                  | Filing |  | 09/20/2024-10:19 |                  |  |
| Kikis Kare LLC         | NEF(09-11-2024 09:32:01 AM) Order/Electronic Form 4          | Filing |  | 09/11/2024-09:32 |                  |  |
| Kikis Kare LLC         | Order/Electronic Form 4-Plaintiff's Motion Denied            | Order  |  | 09/11/2024-09:32 |                  |  |
| Kikis Kare LLC         | NEF(09-10-2024 03:58:55 PM) Order/Electronic Form 4          | Filing |  | 09/10/2024-15:59 |                  |  |
| Kikis Kare LLC         | Order/Electronic Form 4                                      | Order  |  | 09/10/2024-15:58 |                  |  |
| Kikis Kare LLC         | NEF(09-09-2024 10:35:13 AM) Memo/Memo in Support             | Filing |  | 09/09/2024-12:00 |                  |  |
| Kikis Kare LLC         | Memo/Memo in Support   | Filing |  | 09/09/2024-10:35 |                  |  |
| Grist, Stacey          | NEF(09-06-2024 11:34:24 AM) Motion/Alter and/or Amend        | Filing |  | 09/06/2024-15:03 |                  |  |
| Stacey Grist Trustee   | NEF(09-06-2024 11:29:51 AM) Memo/Memo in Opposition          | Filing |  | 09/06/2024-11:54 |                  |  |
| Grist, Stacey          | Plt's/Motion to Alter and/or Amend                           | Motion |  | 09/06/2024-11:34 |                  |  |
| Stacey Grist Trustee   | Memo in Opposition to Def's Motion for Summary Judgment      | Filing |  | 09/06/2024-11:29 |                  |  |
| Kikis Kare LLC         | NEF(09-05-2024 02:25:42 PM) Memo/Memo in Opposition          | Filing |  | 09/05/2024-15:16 |                  |  |
| Kikis Kare LLC         | Memo in Opposition to Motion to Stay                         | Filing |  | 09/05/2024-14:25 |                  |  |



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| Kikis Kare LLC             | NEF(08-28-2024 09:12:48 AM)<br>Order/Other                  | Filing |  | 08/28/2024-09:13 |  |   |
| Kikis Kare LLC             | Order/Other-Sever   | Order  |  | 08/28/2024-09:12 |  |  |
| Kikis Kare LLC             | NEF(08-22-2024 01:43:55 PM)<br>Proposed Order/Other         | Filing |  | 08/22/2024-16:52 |  |  |
| Barlow, Thomas Kennedy     | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Dowling, Curtis W.         | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Gerrald, Matthew G.        | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Provence, Herbert Hall IV  | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Brudvig, Kelsey Jan        | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Peele, Robert McNair III   | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Thomason, Kimberly Truluck | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Puriefoy, Devon Marc       | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Suggs, Fred W. III         | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Simpson, Garrett Miller    | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Flowers, Jacob A           | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/22/2024-16:46 |  |   |
| Comfort Keepers            | Order/Order Cover Sheet \$25.00                             | Filing |  | 08/22/2024-13:43 |  |   |
| Kikis Kare LLC             | NEF(08-20-2024 04:37:51 PM)<br>Motion/Summary Judgment      | Filing |  | 08/20/2024-16:51 |  |  |
| Kikis Kare LLC             | Def's/Kikis Kare & Couchell's/Motion/Summary Judgment       | Motion |  | 08/20/2024-16:37 |  |  |
| Simpson, Garrett Miller    | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Flowers, Jacob A           | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Thomason, Kimberly Truluck | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Suggs, Fred W. III         | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Puriefoy, Devon Marc       | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Peele, Robert McNair III   | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Brudvig, Kelsey Jan        | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |
| Provence, Herbert Hall IV  | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |  |   |

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| Gerrald, Matthew G.                | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |                  |   |
| Dowling, Curtis W.                 | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |                  |   |
| Barlow, Thomas Kennedy             | 9/9/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 08/16/2024-10:20 |                  |   |
| Browning Geriatrics Consulting LLC | NEF(08-09-2024 09:02:21 AM) Order/Electronic Form 4         | Filing |  | 08/09/2024-09:02 |                  |  |
| Browning Geriatrics Consulting LLC | Order/Electronic Form 4                                     | Order  |  | 08/09/2024-09:02 |                  |  |
| Kikis Kare                         | NEF(08-04-2024 09:40:16 PM) Memo/Memo in Support            | Filing |  | 08/05/2024-08:46 |                  |  |
| Kikis Kare                         | Defs' Memo in Support of Motion to Sever                    | Filing |  | 08/04/2024-21:40 |                  |  |
| Stacey Grist Trustee               | NEF(08-02-2024 03:45:46 PM) Motion/Stay                     | Filing |  | 08/02/2024-16:29 |                  |  |
| Stacey Grist Trustee               | Plt/Stacey Grist Trustee/Motion to Stay                     | Motion |  | 08/02/2024-15:45 | 09/09/2024-15:45 |  |
| Barlow, Thomas Kennedy             | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Dowling, Curtis W.                 | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Gerrald, Matthew G.                | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Provence, Herbert Hall IV          | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Brudvig, Kelsey Jan                | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Peele, Robert McNair III           | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Puriefey, Devon Marc               | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Suggs, Fred W. III                 | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Thomason, Kimberly Truluck         | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Simpson, Garrett Miller            | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Flowers, Jacob A                   | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:46 |                  |   |
| Flowers, Jacob A                   | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |   |
| Simpson, Garrett Miller            | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |   |
| Thomason, Kimberly Truluck         | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |   |
| Puriefey, Devon Marc               | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |   |
| Peele, Robert McNair III           | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |   |

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| Brudvig, Kelsey Jan        | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |  |
| Suggs, Fred W. III         | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |  |
| Gerrald, Matthew G.        | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |  |
| Provence, Herbert Hall IV  | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |  |
| Dowling, Curtis W.         | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |  |
| Barlow, Thomas Kennedy     | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/29/2024-11:07 |                  |  |
| Couchell, Chris            | NEF(05-22-2024 04:50:30 PM) Motion/Other                    | Filing |  | 05/23/2024-08:50 |                  |   |
| Kikis Kare LLC             | Def's/Kikis Kare & Couchell's/Motion to Sever               | Motion |  | 05/22/2024-16:50 | 08/05/2024-16:50 |   |
| Parson, Tracy              | NEF(05-21-2024 06:10:24 PM) Motion/Protection from Disco... | Filing |  | 05/22/2024-09:09 |                  |   |
| Parson, Tracy              | Def/Tracy Parson/Motion for Protection from Discovery       | Motion |  | 05/21/2024-18:10 | 08/05/2024-18:10 | <br>     |
| Barlow, Thomas Kennedy     | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Simpson, Garrett Miller    | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Dowling, Curtis W.         | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Gerrald, Matthew G.        | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Provence, Herbert Hall IV  | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Suggs, Fred W. III         | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Brudvig, Kelsey Jan        | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Peele, Robert McNair III   | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Puriefoy, Devon Marc       | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Thomason, Kimberly Truluck | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Flowers, Jacob A           | 8/5/2024_MOTION_Roster/Notice of Motions Roster Publication | Action |  | 05/02/2024-12:55 |                  |  |
| Browning, Jennifer         | NEF(05-01-2024 04:34:00 PM) Motion/Protection from Disco... | Filing |  | 05/02/2024-08:43 |                  |   |
| Browning, Jennifer         | Def's/Browning's/Motion for Protection from Discovery       | Motion |  | 05/01/2024-16:34 | 08/05/2024-16:34 | <br> |
| Puriefoy, Devon Marc       | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 04/29/2024-07:30 |                  |  |
| Suggs, Fred W. III         | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 04/29/2024-07:30 |                  |  |





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| Peele, Robert McNair III   | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Provence, Herbert Hall IV  | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Brudvig, Kelsey Jan        | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Gerrald, Matthew G.        | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Dowling, Curtis W.         | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Flowers, Jacob A           | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Simpson, Garrett Miller    | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Barlow, Thomas Kennedy     | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Thomason, Kimberly Truluck | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:30 |  |   |
| Thomason, Kimberly Truluck | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Flowers, Jacob A           | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Simpson, Garrett Miller    | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Dowling, Curtis W.         | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Barlow, Thomas Kennedy     | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Gerrald, Matthew G.        | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Provence, Herbert Hall IV  | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Suggs, Fred W. III         | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Peele, Robert McNair III   | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Brudvig, Kelsey Jan        | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Puriefey, Devon Marc       | 4/29/2024_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 04/29/2024-07:07 |  |   |
| Grist, Priscilla Mickie    | NEF(03-14-2024 10:18:12 AM) Answer/Amended Answer          | Filing |  | 03/14/2024-13:07 |  |  |
| Grist, Priscilla Mickie    | Answer/Amended Answer To Second Amended Complaint          | Filing |  | 03/14/2024-10:18 |  |  |
| Browning, Jennifer         | NEF(03-12-2024 08:29:11 AM) Order/Continuance              | Filing |  | 03/12/2024-08:29 |  |  |
| Browning, Jennifer         | Order/Continuance  | Order  |  | 03/12/2024-08:29 |  |  |
| Browning, Jennifer         | NEF(02-28-2024 01:25:31 PM) Proposed Order/Continuance     | Filing |  | 02/28/2024-14:40 |  |  |

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| Browning, Jennifer         | Order/Order Cover Sheet \$25.00                                | Filing |  | 02/28/2024-13:25 |  |   |
| Mccreary, Kerry Burnett    | NEF(02-19-2024 12:05:10 PM)<br>Answer/Answer To Amended Com... | Filing |  | 02/19/2024-12:28 |  |    |
| Mccreary, Kerry Burnett    | Answer/Answer To Second Amended Complaint                      | Filing |  | 02/19/2024-12:05 |  |    |
| Grist, Priscilla Mickie    | NEF(02-16-2024 02:28:26 PM)<br>Answer/Answer To Amended Com... | Filing |  | 02/16/2024-16:34 |  |    |
| Grist, Priscilla Mickie    | Answer/Answer To Second Amended Complaint                      | Filing |  | 02/16/2024-14:28 |  |    |
| Browning, Jennifer         | NEF(02-12-2024 02:32:35 PM)<br>Motion/Continuance              | Filing |  | 02/12/2024-16:25 |  |    |
| Browning, Jennifer         | NEF(02-12-2024 01:53:12 PM)<br>Answer/Answer To Amended Com... | Filing |  | 02/12/2024-15:04 |  |    |
| Browning, Jennifer         | Def's/Browning's/Motion for Continuance                        | Motion |  | 02/12/2024-14:32 |  |    |
| Browning, Jennifer         | Answer/Answer To Second Amended Complaint                      | Filing |  | 02/12/2024-13:53 |  |    |
| Parson, Tracy              | NEF(02-09-2024 03:44:42 PM)<br>Answer/Answer To Amended Com... | Filing |  | 02/09/2024-16:14 |  |    |
| Parson, Tracy              | Answer/Answer To Second Amended Complaint                      | Filing |  | 02/09/2024-15:44 |  |    |
| Kikis Kare LLC             | NEF(02-08-2024 07:14:27 AM)<br>Answer/Answer To Amended Com... | Filing |  | 02/08/2024-10:30 |  |    |
| Kikis Kare LLC             | Answer/Answer To Second Amended Complaint                      | Filing |  | 02/08/2024-07:14 |  |    |
| Kikis Kare LLC             | Notice/Notice of Appearance                                    | Filing |  | 02/08/2024-07:14 |  |   |
| Kikis Kare LLC             | NEF(02-01-2024 11:47:29 AM)<br>Notice/Notice of Appearance     | Filing |  | 02/01/2024-11:48 |  |    |
| Kikis Kare LLC             | Notice/Notice of Appearance                                    | Filing |  | 02/01/2024-11:47 |  |   |
| Browning, Jennifer         | NEF(01-31-2024 02:15:55 PM)<br>Notice/Notice of Appearance     | Filing |  | 01/31/2024-14:16 |  |   |
| Browning, Jennifer         | Notice/Notice of Appearance                                    | Filing |  | 01/31/2024-14:15 |  |   |
| Grist, Stacey              | NEF(01-29-2024 03:20:11 PM)<br>Amended/Amended Summons And ... | Filing |  | 01/29/2024-15:53 |  |  |
| Grist, Stacey              | Amended/Second Amended Summons And Second Amended Complaint    | Filing |  | 01/29/2024-15:20 |  |  |
| Grist, Stacey              | NEF(01-08-2024 01:54:06 PM)<br>Order/Electronic Form 4         | Filing |  | 01/08/2024-13:54 |  |  |
| Grist, Stacey              | Order/Electronic Form 4-Amend Pleadings                        | Order  |  | 01/08/2024-13:54 |  |  |
| Thomason, Kimberly Truluck | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication    | Action |  | 11/28/2023-16:41 |  |   |
| Suggs, Fred W. III         | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication    | Action |  | 11/28/2023-16:41 |  |   |
| Puriefoy, Devon Marc       | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication    | Action |  | 11/28/2023-16:41 |  |   |

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| Brudvig, Kelsey Jan        | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 11/28/2023-16:41 |                  |  |
| Gerrald, Matthew G.        | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 11/28/2023-16:41 |                  |  |
| Dowling, Curtis W.         | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 11/28/2023-16:41 |                  |  |
| Provence, Herbert Hall IV  | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 11/28/2023-16:41 |                  |  |
| Peele, Robert McNair III   | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 11/28/2023-16:41 |                  |  |
| Barlow, Thomas Kennedy     | 1/8/2024_MOTION_Roster/Notice of Motions Roster Publication  | Action |  | 11/28/2023-16:41 |                  |  |
| Barlow, Thomas Kennedy     | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Dowling, Curtis W.         | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Provence, Herbert Hall IV  | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Gerrald, Matthew G.        | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Brudvig, Kelsey Jan        | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Peele, Robert McNair III   | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Suggs, Fred W. III         | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Puriefoy, Devon Marc       | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Thomason, Kimberly Truluck | 11/27/2023_MOTION_Roster/Notice of Motions Roster Publicatio | Action |  | 11/07/2023-14:18 |                  |  |
| Grist, Stacey              | NEF(11-03-2023 01:38:02 PM) Motion/Alter and/or Amend        | Filing |  | 11/06/2023-09:10 |                  |   |
| Grist, Stacey              | Plt's/Motion to Amend Pleadings                              | Motion |  | 11/03/2023-12:38 | 01/08/2024-12:38 |  |
| Suggs, Fred W. III         | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Puriefoy, Devon Marc       | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Brudvig, Kelsey Jan        | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Peele, Robert McNair III   | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Dowling, Curtis W.         | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Provence, Herbert Hall IV  | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Gerrald, Matthew G.        | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |
| Barlow, Thomas Kennedy     | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent  | Action |  | 10/12/2023-07:31 |                  |  |

|                            |   |        |  |                  |                  |   |
|----------------------------|---|--------|--|------------------|------------------|---|
| Thomason, Kimberly Truluck | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:31 |                  |   |
| Thomason, Kimberly Truluck | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Puriefey, Devon Marc       | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Dowling, Curtis W.         | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Barlow, Thomas Kennedy     | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Provence, Herbert Hall IV  | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Gerrald, Matthew G.        | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Peele, Robert McNair III   | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Brudvig, Kelsey Jan        | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Suggs, Fred W. III         | 10/12/2023_JT_Roster/Notice of Case Roster Publication Sent | Action |  | 10/12/2023-07:01 |                  |   |
| Grist, Stacey              | ADR/Notice of ADR   | Action |  | 08/22/2023-16:33 |                  |    |
| Mccreary, Kerry Burnett    | NEF(06-29-2023 02:24:44 PM) Answer/Answer To Amended Com... | Filing |  | 06/29/2023-14:50 |                  |    |
| Mccreary, Kerry Burnett    | Answer/Answer To Amended Complaint                          | Filing |  | 06/29/2023-14:24 |                  |    |
| Mccreary, Kerry Burnett    | NEF(06-29-2023 02:22:26 PM) Notice/Notice of Appearance     | Filing |  | 06/29/2023-14:22 |                  |    |
| Mccreary, Kerry Burnett    | Notice/Notice of Appearance                                 | Filing |  | 06/29/2023-14:22 |                  |   |
| Grist, Stacey              | NEF(06-14-2023 09:14:56 AM) Order/Withdraw                  | Filing |  | 06/14/2023-09:15 |                  |    |
| Grist, Stacey              | Order/Withdraw Counsel                                      | Order  |  | 06/14/2023-09:14 |                  |   |
| Grist, Stacey              | NEF(06-13-2023 03:43:26 PM) Motion/Withdraw                 | Filing |  | 06/13/2023-16:43 |                  |  |
| Grist, Stacey              | Plt's/Motion to Withdraw Counsel                            | Motion |  | 06/13/2023-15:43 |                  |  |
| Grist, Stacey              | NEF(05-24-2023 04:33:08 PM) ADR/Notice of ADR               | Filing |  | 05/24/2023-16:33 |                  |  |
| Grist, Stacey              | ADR/Alternative Dispute Resolution (Workflow)               | Action |  | 02/27/2023-09:53 | 08/22/2023-09:53 |   |
| Parson, Tracy              | NEF(10-27-2022 03:11:43 PM) Answer/Answer To Amended Com... | Filing |  | 10/27/2022-15:43 |                  |  |
| Parson, Tracy              | Answer/Answer To Amended Complaint                          | Filing |  | 10/27/2022-15:11 |                  |  |
| Parson, Tracy              | NEF(10-27-2022 03:09:49 PM) Notice/Notice of Appearance     | Filing |  | 10/27/2022-15:10 |                  |  |
| Parson, Tracy              | Notice/Notice of Appearance                                 | Filing |  | 10/27/2022-15:09 |                  |   |

|                           |  |        |  |                  |  |  |
|---------------------------|--|--------|--|------------------|--|--|
| Grist, Priscilla Mickie   | NEF(09-22-2022 04:40:34 PM)<br>Answer/Answer To Amended Com... | Filing |  | 09/23/2022-08:59 |  |  |
| Grist, Priscilla Mickie   | Answer/Answer To Amended Complaint                             | Filing |  | 09/22/2022-16:40 |  |  |
| Grist, Priscilla Mickie   | NEF(09-15-2022 03:35:29 PM)<br>Notice/Notice of Appearance     | Filing |  | 09/15/2022-16:00 |  |  |
| Grist, Priscilla Mickie   | Notice/Notice of Appearance                                    | Filing |  | 09/15/2022-15:35 |  |  |
| Kikis Kare LLC            | NEF(09-15-2022 11:43:09 AM)<br>Answer/Answer and Jury Deman... | Filing |  | 09/15/2022-12:16 |  |  |
| Kikis Kare LLC            | Answer/Answer and Jury Demand                                  | Filing |  | 09/15/2022-11:43 |  |  |
| Kikis Kare LLC            | NEF(09-15-2022 09:59:43 AM)<br>Answer/Answer To Amended Com... | Filing |  | 09/15/2022-11:07 |  |  |
| Kikis Kare LLC            | Answer/Answer To Amended Complaint                             | Filing |  | 09/15/2022-09:59 |  |  |
| Kikis Kare LLC            | NEF(09-15-2022 09:42:19 AM)<br>Notice/Notice of Appearance     | Filing |  | 09/15/2022-09:44 |  |  |
| Kikis Kare LLC            | Notice/Notice of Appearance                                    | Filing |  | 09/15/2022-09:42 |  |  |
| Browning, Jennifer        | NEF(09-14-2022 04:12:31 PM)<br>Answer/Answer To Amended Com... | Filing |  | 09/15/2022-08:52 |  |  |
| Browning, Jennifer        | Answer/Answer To Amended Complaint                             | Filing |  | 09/14/2022-16:12 |  |  |
| Browning, Jennifer        | NEF(09-14-2022 04:02:05 PM)<br>Notice/Notice of Appearance     | Filing |  | 09/14/2022-16:02 |  |  |
| Browning, Jennifer        | Notice/Notice of Appearance                                    | Filing |  | 09/14/2022-16:02 |  |  |
| Grist, Stacey             | NEF(09-08-2022 04:42:44 PM)<br>Service/Acceptance Of Servic... | Filing |  | 09/09/2022-08:55 |  |  |
| Grist, Stacey             | Service/Acceptance Of Service on Tracy Parson                  | Filing |  | 09/08/2022-16:42 |  |  |
| Grist, Stacey             | NEF(09-06-2022 04:53:18 PM)<br>Service/Affidavit Of Service    | Filing |  | 09/07/2022-09:09 |  |  |
| Grist, Stacey             | Service/Affidavit Of Service on Kerry Burnett McCreary         | Filing |  | 09/06/2022-16:53 |  |  |
| Grist, Stacey             | NEF(09-01-2022 02:17:48 PM)<br>Service/Affidavit Of Service    | Filing |  | 09/01/2022-14:30 |  |  |
| Grist, Stacey             | Service/Certificate Of Service                                 | Filing |  | 09/01/2022-14:17 |  |  |
| Grist, Stacey             | Service/Affidavit Of Service on Kikis Kare LLC                 | Filing |  | 09/01/2022-14:17 |  |  |
| Grist, Stacey             | Service/Affidavit Of Service on Chris Couchell                 | Filing |  | 09/01/2022-14:17 |  |  |
| Lyon, Leyland H Jr        | NEF(08-25-2022 09:51:20 AM)<br>Service/Acceptance Of Servic... | Filing |  | 08/25/2022-11:06 |  |  |
| Grist, Priscilla Mickie   | Service/Acceptance Of Service on Priscilla Mickie Grist        | Filing |  | 08/25/2022-09:51 |  |  |
| Lyon, Caroline York Grist | Service/Acceptance Of Service on Caroline York Grist Lyon      | Filing |  | 08/25/2022-09:51 |  |  |

|                           |  |               |  |                         |  |   |
|---------------------------|--|---------------|--|-------------------------|--|---|
| <b>Lyon, Leyland H Jr</b> | <b>Service/Acceptance Of Service on Leyland H Lyon, Jr</b>         | <b>Filing</b> |  | <b>08/25/2022-09:51</b> |  |   |
| <b>Grist, Stacey</b>      | <b>NEF(08-15-2022 01:00:28 PM) Amended/Amended Summons And ...</b> | <b>Filing</b> |  | <b>08/15/2022-14:22</b> |  |  |
| <b>Grist, Stacey</b>      | <b>Amended/Amended Summons And Amended Complaint</b>               | <b>Filing</b> |  | <b>08/15/2022-13:00</b> |  |  |
| <b>Grist, Stacey</b>      | <b>Summons &amp; Complaint</b>                                     | <b>Filing</b> |  | <b>08/01/2022-09:53</b> |  |  |

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**Chart of Cases****Greenville County Court of Common Pleas & Probate Court**

See Greenville County Public Index for additional details regarding cases before the Court of Common Pleas.

| <b>Case Number</b>                                 | <b>Caption</b>   | <b>Claims</b>   | <b>Filed Date</b> | <b>Status</b>                                 | <b>Disposition Date<br/>(or info on filings)</b>                                      |
|--|--|---|-------------------|---|---|
| <b>2020GC2300088</b><br><br><b>(Probate Court)</b> | <i>In re: Stanford W. Grist</i><br><br><i>In re: Stanford W. Grist Priscilla Mickie Grist v. Stanford W. Grist, Stacey Desiree Grist, and Charlotte Roxanne Grist</i>      | Probate court determination of incapacity, appointment of guardian and guardian <i>ad litem</i> | July 15, 2020     | Pending                                       | See <b>Exhibit 2</b> , Order of Greenville County Probate Court, filed July 30, 2020. |
| <b>2020GC2300136</b><br><br><b>(Probate Court)</b> | <i>In re: Stanford W. Grist</i><br><br><i>Caroline York Grist Lyon v. Stanford W. Grist Stacey Desiree Grist, Priscilla Mickie Grist and Charlotte Roxanne Grist</i>       | Probate court appointment of conservator for incapacitated individual                           | Sept. 10, 2020    | Pending                                       | See ECF No. 25-3  |
| <b>2020CP2304915</b><br><br><b>(Common Pleas)</b>  | <i>In re Stanford W. Grist: Stacey D. Grist v. Caroline York Grist Lyon, Leyland H. Lyon, Jr., Priscilla Mickie Grist, Charlotte R. Grist Smith, and Stanford W. Grist</i> | Declaratory Judgment Action   | 10/26/2020        | Dismissed under Rule 40(j) on 3/3/2022        | 03/03/2022  |
| <b>2022CP2302116</b><br><br><b>(Common Pleas)</b>  | <i>In re Stanford W. Grist: Stacey D. Grist v. Caroline York Grist Lyon, Leyland H. Lyon, Jr., Priscilla Mickie Grist, Charlotte R. Grist Smith, and Stanford W. Grist</i> | Declaratory Judgment Action (restored 2020CP2304915)  | 04/22/2022        | Restored to Active Docket 4/14/2022; Disposed | 08/16/2022  |

**Chart of Cases**

**Greenville County Court of Common Pleas & Probate Court**

See Greenville County Public Index for additional details regarding cases before the Court of Common Pleas.

| Case Number                         | Caption   | Claims   | Filed Date | Status                                   | Disposition Date (or info on filings)  |
|-------------------------------------|---|--|------------|--|--|
| 2022CP2304055<br><br>(Common Pleas) | <i>Stacey Grist as Agent under a Power of Attorney for Stanford W. Grist and as Trustee of the Second Amended Trust of Stanford W. Grist living Trust dated Dec. 5, 2005, Stanford Grist Veterinary Services LLC, Chestnut Ridge Farm, LLC, and Hilly Street LLC v. Priscilla Mickie Grist, Caroline York Grist Lyon, Leyland H. Lyon, Jr., Jennifer Browning, Browning Geriatrics Consulting LLC, Tracy Parson, Kiki's Kare, LLC d/b/a Comfort Keepers, Erin Couchell Individually and as a member of Kiki's Kare, Chris Couchell individually and as a member of Kiki's Kare, LLC, and Kerry Burnett McCreary</i> | Requesting that "Court punish the Defendants" and asserting claims of negligence/gross negligence, negligent hiring, negligent training, negligent supervision, abuse of process/aiding and abetting abuse of process, civil conspiracy, violation of SC Unfair Trade Practices Act, Intentional Interference with a Business Contract, Disinheritance, violation of Power of Attorney Act | 08/01/2022 | Pending /ADR                             | <b><i>Def's Kiki's Kare, LLC, Chris Couchell, and Erin Couchell's Motion to Sever (for trial)</i></b> filed 5/22/2024, argued 8/5/2024; granted 8/28/2024; granted 8/28/2024<br><br><b><i>Plaintiffs' Motion to Stay (due to Plaintiffs filing federal RICO case)</i></b> filed 8/2/2024; hearing scheduled 9/10/2024 ( <i>pending</i> )<br><br><b><i>Def's Kiki's Kare, LLC, Chris Couchell, and Erin Couchell's Motion for Summary Judgment</i></b> filed 8/20/2024; hearing scheduled 9/10/2024 ( <i>pending</i> ). |
| 2022CP2304463<br><br>(Common Pleas) | <i>Stacey Grist as Agent under a Power of Attorney for Stanford W. Grist v. Priscilla Mickie Grist and Caroline York Grist Lyon</i>   | Injunction (Anti-Suit Injunction) seeking to prevent defendants from pursuing further conservatorship and/or guardianship proceedings in probate court.  | 08/18/2022 | Dismissed under Rule 40(j) on 11/13/2022 | 11/14/2023   |

**Chart of Cases****Greenville County Court of Common Pleas & Probate Court**

See Greenville County Public Index for additional details regarding cases before the Court of Common Pleas.

| Case Number                                       | Caption   | Claims   | Filed Date | Status  | Disposition Date (or info on filings)   |
|---|---|--|------------|---|---|
| <b>2023CP2304899</b><br><br><b>(Common Pleas)</b> | <i>Stacey Grist as Agent under a Power of Attorney for Stanford W. Grist and as Trustee of the Second Amended Trust of Stanford W. Grist living Trust dated Dec. 5, 2005, Stanford Grist Veterinary Services LLC, Chestnut Ridge Farm, LLC, and Hilly Street LLC v. Priscilla Mickie Grist, Caroline York Grist Lyon, Leyland H. Lyon, Jr., Jennifer Browning, Browning Geriatrics Consulting LLC, Tracy Parson, Kiki's Kare, LLC d/b/a Comfort Keepers, Erin Couchell Individually and as a member of Kiki's Kare, Chris Couchell individually and as a member of Kiki's Kare, LLC, and Kerry Burnett McCreary</i> | Abuse of process/aiding and abetting abuse of process; civil conspiracy; SC Unfair Trade Practices Act; negligent hiring, negligent training, negligent supervision, intentional interference with business contract; violation of Power of Attorney Act.<br><br><b>(Removed from Probate Court)</b> | 09/25/2023 | Filed in Greenville Probate Court 8/15/2022; Removed to Common Pleas 9/25/2023<br><br>Pending/ADR | See 2022CP2304055 – main file on Public Index   |
| <b>2024CP2303236</b><br><br><b>(Common Pleas)</b> | <i>Roland O'Neil Rabon, Jr. v. Paul Hulsey, Cherie Durand, Kimberly Thomason, Devon Puriefoy, &amp; Desa Ballard, Stacey Grist, Mayra Michalski, Margaret Ann Miniard and John &amp; Jane Does ##1-14</i>   | Libel & Libel per se   | 05/24/2024 | Pending/ADR   | 5 Motions to Dismiss filed between 6/21/2024 and 7/17/2024; hearing scheduled 9/25/2024 (pending) |
| <b>2024CP2303271</b><br><br><b>(Common Pleas)</b> | <i>Clayton L. Jennings v. Paul Hulsey, Cherie Durand, Kimberly Thomason, Devon Puriefoy, Desa Ballard, Stacey Grist, Margaret Miniard and John &amp; Jane Does ## 1-14</i>  | Libel & Libel per se   | 05/24/2024 | Pending/ADR   | 7 Motions to Dismiss filed between 6/21/2024 and 8/6/2024; hearing scheduled 9/25/2024 (pending)  |

**Chart of Cases**

**Greenville County Court of Common Pleas & Probate Court**

See Greenville County Public Index for additional details regarding cases before the Court of Common Pleas.

| <b>Case Number</b>                                | <b>Caption</b>   | <b>Claims</b>  | <b>Filed Date</b> | <b>Status</b>   | <b>Disposition Date<br/>(or info on filings)</b>  |
|---|--|--|-------------------|-----------------|---|
| <b>2024CP2303730</b><br><br><b>(Common Pleas)</b> | <i>Jennifer L. Browning and Browning Geriatric Consulting, LLC v. Paul Hulse, Cherie Durand, Kimberly Thomason, Devon Puriefoy, Desa Ballard, Mayra Michalski, Luis Michalski, Margaret Miniard, Stacey Grist, and John and Jane Does 1-14</i> | Defamation/Libel and Libel <i>Per Se</i> ; Abuse of Process; Intentional Infliction of Emotional Distress/Outrage; Intentional Interference with Prospective Contracts/Business Relations; Declaratory Judgment (regarding barratry-like conduct of attorneys) | 06/17/2024        | Pending/<br>ADR | 4 Motions to Dismiss filed between 7/12/2024 and 7/16/2024; hearing scheduled 9/25/2024 (pending) |

# EXHIBIT A

| Date       | Related To   | Description  |
|------------|--|--|
| 07/20/2020 | Dr. Stanford Grist   | Entered task for CC to follow up with JB regarding situation with S. Grist. Can we go ahead and set up a meeting?  |
| 07/20/2020 | Dr. Stanford Grist   | Please follow up with Jennifer Browning regarding Stanford Grist's situation. Can we go ahead and set up a meeting?  |
| 08/27/2020 | Dr. Stanford Grist   | Had a discussion on Tuesday 8/25 about care for Dr. Grist with Tracy Parsons. Discussed CK taking over on 9/8 8a-8p. Tracy to send me additional info about his care.  |
| 08/27/2020 | Dr. Stanford Grist   | I tried reaching daughter Stacey regarding getting paperwork signed. Left voicemail  |
| 08/27/2020 | Dr. Stanford Grist   | Stacey returned my call. I let her know that I had been speaking with Tracy Parsons and will email the paperwork over to be signed. She said that sounded like a plan. After suggesting an in-home assessment we decided that may not be best at this time because the other company's caregiver would be with him during that time and it may upset them. We decided on an intro for the first shift instead. Created client profile and emailed docuSign docs to be signed.  |
| 08/28/2020 | Browning Geriatric, Dr. Stanford Grist                       | Contact referral source, Browning Geriatric, to update that client   |
| 09/08/2020 | Dr. Stanford Grist   | Dr. Stanford Grist has been scheduled for the first time. Thank for referral.  |
| 09/08/2020 | LaShon Sams, Dr. Stanford Grist                              | MUST HAVE INTRO FOR THIS SHIFT!-CS. (Added to shift that Occurs once on 09/08/2020 from 06:00 AM EDT to 07:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 09/08/2020 | LaShon Sams, Parsons Tracy, Dr. Stanford Grist               | Spoke to Stacy about the schedule she is aware who is coming. LG. (Added to shift that Occurs once on 09/08/2020 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver LaShon Sams)  |
| 09/08/2020 | LaShon Sams, Parsons Tracy, Dr. Stanford Grist               | Intro caregiver Lashon Sams at Dr. Stanford Grist's home at 8am (Guardian Tracy Parsons will be there as well). I introduced LaShon at Dr Grist's. Tracy filled us in a bit on his situation. When we arrived, he hadn't come home yet after spending the night with Marilyn (ex-wife). When they arrived, he actually was very sweet and didn't seem put out at all that we were all there. We all went inside and he gave us all some Japanese pears that grew on his trees. He is very sweet. Marilyn was very gracious, as well, and very helpful to LaShon, showing her where everything was. LaShon is aware that she needs to call me if anything other than the regular 12 hour shift happens--any adjustment they make or if Marilyn just picks him up early--she knows to call.                              |
| 09/09/2020 | LaShon Sams, Parsons Tracy, Dr. Stanford Grist, Stacey Grist | Follow up with family/caregiver to see how first shift went. Daughter Stacey told me LaShon is NOT her Dad's favorite; she thinks it is because he was made to feel bad when no one could find him. He is accustomed to being out on his property and doesn't see anything wrong with it, so doesn't understand why everyone gets so upset. I assured Stacey that he has every right to be out there and that we were going to work something out. She also stated that she will be there for the weekend and also Monday and Tuesday, so he won't need anyone all weekend and only until 6 on Mon and Tues. I verified this with Tracy. LaShon said she was very upset when she couldn't find him, but it was a relief when she finally did. It will just take time to get used to his habits and learn the property. |
| 09/11/2020 | Dr. Stanford Grist   | Tell Heather to speak with caregiver about a \$1 more an hour if she works out -HP. (Added to shift that Occurs once on 09/11/2020 from 09:00 PM EDT to 10:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 09/11/2020 | Dr. Stanford Grist, Jeannie Truman                           | I reviewed all care needs with Jeannie and she is comfortable. CS. (Added to shift that Occurs once on 09/11/2020 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 09/11/2020 | Parsons Tracy, Dr. Stanford Grist, Stacey Grist, Raymond R.  | I spoke with Tracy as well as Stacey and confirmed that they are willing to raise the rate to \$25 in order to pay the required rate to the CG. They are aware that the higher rate will only begin after the first two weeks if Dr Grist and Raymond hit it off. If they do NOT hit it off, the rate will not change and we will again begin looking for a male caregiver.  |
| 09/12/2020 | Dr. Stanford Grist, Jeannie Truman                           | Jeannie knows not to go. LG (Added to shift that Occurs once on 09/12/2020 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 09/12/2020 | Dr. Stanford Grist, Jeannie Truman                           | Shift not needed. Cancel Jeannie. CS. (Added to shift that Occurs once on 09/12/2020 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 09/14/2020 | Dr. Stanford Grist, Jeannie Truman                           | answered YES by mistake to Covid-19 question. Neither the client or the caregiver are displaying any signs or symptoms of COVID-19. CP   |
| 09/14/2020 | LaShon Sams, Dr. Stanford Grist                              | Lashon is aware that the time will end at 6pm due to Stacey picking up Dr. Grist at 6pm -HP. (Added to shift that Occurs once on 09/14/2020 from 08:00 AM EDT to 06:00 PM EDT for Dr. Stanford Grist; assigned to caregiver LaShon Sams)   |
| 09/14/2020 | LaShon Sams, Dr. Stanford Grist                              | Lashon is only needed until 6pm this day. Please let her know. CS. (Added to shift that Occurs once on 09/14/2020 from 08:00 AM EDT to 06:00 PM EDT for Dr. Stanford Grist; assigned to caregiver LaShon Sams)   |
| 09/14/2020 | LaShon Sams, Dr. Stanford Grist                              | LaShon knows not to go. I told her that Dr. Grist has got a male caregiver now -BMP (Added to shift that Occurs once on 09/14/2020 from 08:00 AM EDT to 06:00 PM EDT for Dr. Stanford Grist; assigned to caregiver LaShon Sams)  |
| 09/15/2020 | Amanda Barron, Dr. Stanford Grist                            | Hey Amanda!! Will you please give me a call as soon as you can? I have an opportunity for you tomorrow, but I need to set it up as soon as possible. It does pay \$1 more per hour. Please call me as soon as you can. 828-436-1925. Thank You!!   |
| 09/15/2020 | Dr. Stanford Grist   | "Christie  |
| 09/15/2020 | Dr. Stanford Grist   | Just checking. Do you still not anyone for Grist?  |
| 09/15/2020 | Dr. Stanford Grist   | Tracy"   |
| 09/15/2020 | Dr. Stanford Grist   | "Hi Tracy,   |
| 09/15/2020 | Dr. Stanford Grist   | I am at home today, but have been in contact with Lindsay throughout the morning and our scheduling team is still actively looking for a replacement caregiver for him. Lindsay should be in touch soon with more of an update. I am so incredibly sorry that this happened, and we will do all that we can to prevent this from happening again.  |
| 09/15/2020 | Dr. Stanford Grist   | Thank you,   |
| 09/15/2020 | Dr. Stanford Grist   | Care only needed til 6pm this day. CS. (Added to shift that Occurs once on 09/15/2020 from 04:00 PM EDT to 06:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 09/15/2020 | Laura Garrart, Dr. Stanford Grist                            | Spoke to Tracy and Stacey told them Laura will be there today and tomorrow they said to cancel this shift for today and they will see Laura tomorrow. LG (Added to shift that Occurs once on 09/15/2020 from 01:45 PM EDT to 06:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Laura Garrart)   |
| 09/15/2020 | Lorri Byers, Dr. Stanford Grist                              | Good morning Lorri.  |
| 09/15/2020 | Lorri Byers, Dr. Stanford Grist                              | I had a call out for Dr. Grist this morning. I spoke with Tracey Parsons after speaking with Christie. I tried to contact you numerous times but I continued to receive a message that your voicemail box had not been set up. I was trying the number 864-621-6943. Is this the correct number? I just wanted to make sure because you are tagged as the main CCC.  |
| 09/15/2020 | Lorri Byers, Dr. Stanford Grist                              | Please advise.   |
| 09/15/2020 | Lorri Byers, Dr. Stanford Grist                              | Many thanks.   |
| 09/15/2020 | Sharon Kruger, Dr. Stanford Grist                            | Care only needed til 6pm not 8pm this day. Also, if Sharon Kruger doesn't drive I don't believe we can send her here. CS. (Added to shift that Occurs once on 09/15/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Kruger)  |

| Date       | Related To   | Description   |
|------------|--|---|
| 09/15/2020 | Sharon Kruger, Dr. Stanford Grist                                  | Sharon is good to stay until 6pm (she knows she needs to wait until Stacey gets there at 6 to leave). I also made her aware that she must drive her vehicle to the shift. Sent to Christie to go over the rest of the details of client -HP. (Added to shift that Occurs once on 09/15/2020 from 08:00 AM EDT to 06:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Kruger)  |
| 09/15/2020 | Sharon Kruger, Dr. Stanford Grist                                  | sharon is s cpick. (Added to shift that Occurs once on 09/15/2020 from 08:00 AM EDT to 06:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Kruger)  |
| 09/16/2020 | Laura Garrant, Dr. Stanford Grist                                  | Stacey and Tracy are aware Laura will be there tomorrow. LG. (Added to shift that Occurs once on 09/16/2020 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Laura Garrant)  |
| 09/17/2020 | Dr. Stanford Grist   | I followed up with Sharon, she is with my client tomorrow. I want to make sure she can go. She is fine going to my client. She stated she had a panic attack today and would rather not go because is it too far and she may not find her way home CP (Added to shift that Occurs once on 09/17/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 09/17/2020 | Dr. Stanford Grist   | I spoke with Sharon regarding going on Thursday and she would rather not go. I have made Lindsay and Heather aware of this. CP. (Added to shift that Repeats weekly on Thursday starting on Sep 17, 2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 09/17/2020 | Sharon Kruger, Dr. Stanford Grist                                  | I don't think we can send Sharon here because she does not drive. CS. (Added to shift that Repeats weekly on Thursday starting on Sep 17, 2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Kruger)   |
| 09/18/2020 | Laura Garrant, Dr. Stanford Grist                                  | Laura also said they will be changing the hours to 8am-7pm. LG. (Added to shift that Occurs once on 09/18/2020 from 02:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Laura Garrant)   |
| 09/18/2020 | Laura Garrant, Dr. Stanford Grist                                  | Laura called to state she can work tomorrow 2pm-7pm if needed. LG. (Added to shift that Occurs once on 09/18/2020 from 02:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Laura Garrant)  |
| 09/18/2020 | Sharon Provost, Dr. Stanford Grist                                 | EP said I could call Sharon for this shift. Sharon knows all details -HP. (Added to shift that Occurs once on 09/18/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)  |
| 09/18/2020 | Sharon Provost, Dr. Stanford Grist                                 | I did a intro/ sup with CG Sharon she was dressed professional had her name badge and was caring her mask. She has been to client before with her other company. I thing she well be a prefect fit. She is a caring caregiver. I let the office know that she likes go to this client.~LIG  |
| 09/18/2020 | Sharon Provost, Dr. Stanford Grist                                 | Sent profile to Sharon. -HP. (Added to shift that Occurs once on 09/18/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)   |
| 09/21/2020 | Laura Garrant, Dr. Stanford Grist                                  | Call Laura and see how intro went. Chat about Dr Grist..Laura said Dr Grist is very sweet and does forget little things, but he does recognize that he knows her when she comes and will remind himself of her name by reading her badge. She estimates his dementia at mild to moderate. He does better in the mornings and declines throughout the day. He does NOT like to be questioned and will become agitated if he feels you are asking too many questions. We should ALWAYS stop what we're doing with him at the FIRST sign of agitation and redirect him. He loves to be outside, so the easiest way to redirect him is to take him outside or ask him to show you around the property--the pears trees, the apple trees, etc. If you will help him pick out his clothes, he will take them and go take a shower on his own. |
| 09/21/2020 | Sharon Provost, Dr. Stanford Grist                                 | sharon said Dr. Grist isn't a good fit for him. She said he isn't responding well to her. She said he'll say little comments a lot and he looks just sad and defensive with her. As of now, she does not want to be pulled from Dr. Grist. She will give it a go again on Friday. Made LB and LG aware. She also said the daughter rushed in at 6pm on 9/21 and needed to leave right away with her dad. She is still being paid for 7pm. -HP. (Added to shift that Occurs once on 09/21/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)   |
| 09/22/2020 | Dr. Stanford Grist   | Initial Reassessment Due for Dr. Grist...no changes at this time  |
| 09/22/2020 | Dr. Stanford Grist, Mya Westmoreland                               | Mya is aware not to go. LG (Added to shift that Occurs once on 09/22/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Mya Westmoreland)   |
| 09/22/2020 | Dr. Stanford Grist, Sabra Sandee                                   | Cancel this shift per Tracy P. Sabra is aware. LG (Added to shift that Occurs once on 09/22/2020 from 08:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 09/22/2020 | Dr. Stanford Grist, Sabra Sandee                                   | I let Sabra know that she was paid for this shift and that she's doing a great job thus far! She's happy so far!!! -HP. (Added to shift that Occurs once on 09/22/2020 from 08:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 09/22/2020 | Dr. Stanford Grist, Sabra Sandee                                   | Spoke to Brandon in CC Meeting and we are going to charge and pay for this shift since less than 3 hours notice. This is so the caregiver will be paid -HP. (Added to shift that Occurs once on 09/22/2020 from 08:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 09/23/2020 | Dr. Stanford Grist, Courtney Vera                                  | Introduce and show around CG: CG Courtney was dressed great for the client. She was on time had on her name badge and had a mask. I showed her around and I think she well be a great fit.~LIG  |
| 09/23/2020 | Dr. Stanford Grist, Sabra Sandee                                   | Client has an appointment per Tracy 2pm-7pm is not needed. LG (Added to shift that Occurs once on 09/23/2020 from 02:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 09/23/2020 | Dr. Stanford Grist, Sabra Sandee                                   | Sharon knows not to go to the 8-2 shift -HP. (Added to shift that Occurs once on 09/23/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 09/23/2020 | Lindsay Greene, Heather Plumley, Parsons Tracy, Dr. Stanford Grist | I spoke with Tracy about Dr Grist. She told me that she is very pleased with our services. There have been rough spots, but we have someone there every day, and we are on top of things in a way that the other company just was not. She wanted to thank us all for our hard work. I passed this on to Heather and she agreed to pass it on in the Greenville office.   |
| 09/24/2020 | Dr. Stanford Grist, Jessica Masters                                | Jessica knows not to go -BMP (Added to shift that Occurs once on 09/24/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Masters)  |
| 09/25/2020 | Dr. Stanford Grist, Courtney Vera                                  | Courtney's daughter is sick and can not work today. LG (Added to shift that Occurs once on 09/25/2020 from 02:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Courtney Vera)  |
| 09/25/2020 | Sharon Provost, Dr. Stanford Grist                                 | Sharon picked up this shift -HP. (Added to shift that Occurs once on 09/25/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)   |
| 09/25/2020 | Sharon Provost, Dr. Stanford Grist                                 | Sharon wasn't a good fit so she knows she will not return. I told her to reach out to EP for more hours -HP (Added to shift that Occurs once on 09/25/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)  |
| 09/25/2020 | Sharon Provost, Dr. Stanford Grist                                 | ust spoke to Tracy. They honestly don't want Sharon back. Apparently she is the one who worked with him through the other company. Also, according to our Syncrotist call, last night he wanted her gone so had his daughter come pick him up. I think Dr Grist is just determined not to have a caregiver, and will do whatever it takes to make that happen. -LB. (Added to shift that Occurs once on 09/25/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)  |
| 09/28/2020 | Sharon Provost, Dr. Stanford Grist                                 | Check on Sharon -HP. (Added to shift that Occurs once on 09/28/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)   |
| 09/28/2020 | Sharon Provost, Dr. Stanford Grist                                 | Sharon would like to do 3pm-7pm. LG. (Added to shift that Repeats weekly on Monday starting on Sep 28, 2020 from 04:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)   |
| 09/29/2020 | Dr. Stanford Grist   | Courtney must have called the office for her Friday call out in order to be on shifts this week -HP. (Added to shift that Occurs once on 09/29/2020 from 02:00 PM EDT to 03:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 09/29/2020 | Dr. Stanford Grist, Sabra Sandee                                   | issued Sabra a verbal warning for being late this morning. She said she has no idea how she was clocked in. She said it may have something to do with the internet. I explained this can not happen again. She apologized and understood. BC  |
| 10/01/2020 | Dr. Stanford Grist   | Email to daughter, Stacey, regarding ACH account numbers.   |
| 10/01/2020 | Dr. Stanford Grist   | Stacey,<br>The ACH information we have on file for your father, Dr. Stanford Gist, will not process. I have attached the form for your review. Please let me know if there is a different account to use for payment. The outstanding invoice is also attached.<br>Thanks so much for your help<br>The ACH would not process for Dr Grist. I have emailed Christie Snyder to find out the best person to contact.   |
| 10/02/2020 | Dr. Stanford Grist, Courtney Vera                                  | Courtney called out due to her being sick. LG (Added to shift that Occurs once on 10/02/2020 from 04:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Courtney Vera)   |
| 10/03/2020 | Dr. Stanford Grist, Sabra Sandee                                   | left VM msg. for weekend shift reminders. CP. (Added to shift that Occurs once on 10/03/2020 from 01:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |

| Date       | Related To  | Description  |
|------------|---|--|
| 10/03/2020 | Jason Corpening, Dr. Stanford Grist               | I talked with Jason and let him know I will be there on Saturday. I let him know about the client and what to wear. He said he can't wait to go. He is also an outdoors person. LG. (Added to shift that Occurs once on 10/03/2020 from 08:00 AM EDT to 01:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 10/03/2020 | Jason Corpening, Dr. Stanford Grist               | Into/Supervisory 10/3 8:00am CG was on time had a CK shirt on name badge and a mask. He thanked me for helping him get there. I showed him around and asked him if he knew how to cook. He did and made the client scrambled eggs with cheese, English muffin with apple butter, and cut up pears. He then cleared up the kitchen. He was planning on going outside and helping out the client with the yard work. Great caregiver. LJG  |
| 10/06/2020 | Dr. Stanford Grist                                | Asked Courtney V to contact me. Shift diff ?. (Added to shift that Occurs once on 10/06/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 10/07/2020 | Dr. Stanford Grist                                | Asked Maria F for this full shift -BMP. (Added to shift that Repeats weekly on Wednesday starting on Oct 07, 2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/07/2020 | Dr. Stanford Grist                                | Email to Tracy Parsons today:  |
|            |   | Tracy,<br>The ACH information given to Comfort Keepers for Dr. Grist will not process. It is not declining, our system is stating invalid account number. I have emailed the daughter, Stacey, but have not heard back from her. I am not sure if you can help me. There are now two invoices outstanding in the amount of \$5,072.95. The ACH form is attached. Please let me know how to proceed. Thanks so much<br>See if Jason can help any next week with Dr Grist  |
| 10/07/2020 | Jason Corpening, Dr. Stanford Grist               | Awaiting confirmation from LG -HP. (Added to shift that Occurs once on 10/07/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Laura Garrant)   |
| 10/07/2020 | Laura Garrant, Dr. Stanford Grist                 | Spoke with dtr, Stacey, today. The account we were trying to draft from is a trust account and we can not draft. She is sending a check today for the balance due of \$5,072.95 for services thru 10/4/20. She has also agreed to mail us a check once a month for payment of services.  |
| 10/08/2020 | Dr. Stanford Grist                                | I have a call and text out to Jeannie to see if she can stay until 4pm. LG. (Added to shift that Occurs once on 10/09/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 10/09/2020 | Dr. Stanford Grist, Jeannie Truman                | Jeannie is good to work until 4pm.LG. (Added to shift that Occurs once on 10/09/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 10/09/2020 | Dr. Stanford Grist, Jeannie Truman                | Sent text weekend reminder -HP. (Added to shift that Occurs once on 10/10/2020 from 08:00 AM EDT to 01:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Cindy Galloway)   |
| 10/10/2020 | Cindy Galloway, Dr. Stanford Grist                | Gas card also for this shift -HP. (Added to shift that Occurs once on 10/12/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 10/12/2020 | Dr. Stanford Grist, Jeannie Truman                | Email from Stacey:   |
| 10/13/2020 | Dr. Stanford Grist                                | Hey Brandie<br>I have mailed out this months check and next months as well .   |
| 10/13/2020 | Dr. Stanford Grist, Sabra Sandee                  | thanke Stacey<br>Email sent to Lindsay, Christie, Lori B. and Heather: Hey all,<br><br>Sabra called complaining that the Ex-Wife is taking everything from his house. She has taken all of his pruners for gardening, all of his chips and snacks, and recently took his wallet with \$24 plus his insurance cards and debit cards. Sabre is concerned bc now he has nothing and is wanting to buy new pruners and things for gardening but can't. She also mentioned that the grass desperately needs to be cut at the home.<br><br>Sabra is frustrated and feels like something needs to be done about the ex-wife. She feels that it isnt fair for her to take everything from Dr. Grist. He wants to buy things to plant and she feels that this would be good for him, but they have no means of doing this.<br><br>What can we do to help this situation? Sabra asked for someone to update her if there is anything she can do to help! |
| 10/13/2020 | Dr. Stanford Grist, Sabra Sandee                  | took call from Sabra...see general note in activity of email sent to heather, lindsay, lori and christie -KH. (Added to shift that Occurs once on 10/13/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 10/16/2020 | Dr. Stanford Grist                                | Did we receive check from Stacey? Email Tracy Parsons an update when received.   |
| 10/16/2020 | Dr. Stanford Grist                                | Received the \$5,072.95 check from daughter Stacey to cover expenses through 10/4/20. She also sent us a \$5,000 check dated 11/1/20. By the time I can cash the check, Dr Grist's expenses will be over \$6,000, then she will owe another check for the month of Novembers expenses. I emailed Tracy Parsons to keep her updated on payment status.  |
| 10/16/2020 | Jason Corpening, Dr. Stanford Grist, Sabra Sandee | I spoke to caregiver Sabra Sandee and mentioned that Dr. Grist had several falls yesterday and that I wanted to check to see how he is doing. She did say that it's not normal for him to fall but that she's not technically surprised because he does stumble a lot. He is outside as normal and walking fine. Dr. Grist did tell Sabra that he fell yesterday and that his lower back is sore.<br><br>EP- Is Jason going to fill out an incident report?<br><br>LB- I know you're off today, do you want Christie to call Tracy with the above update?<br><br>Thank you,<br>Heather   |
| 10/19/2020 | Sharon Provost, Dr. Stanford Grist                | Sharon emailed Lori Byers and stated she needs off 10/19-10/23 -HP. (Added to shift that Occurs once on 10/19/2020 from 04:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sharon Provost)   |
| 10/20/2020 | Dr. Stanford Grist, Sabra Sandee                  | Per LB after speaking with Tracy, Dr. Grist has an appt at 10:30am (501 Memorial Drive Ext. Greer 29651: Galon Healthcare with NP Long). I let Sabra know not to let Dr. Grist know about the appt until in the morning because that was set him off. She is also aware that Stacey may want to take him to lunch after. Sabra knows to call the office if for any reason she is sent away during her shift for any reason -HP. (Added to shift that Occurs once on 10/20/2020 from 08:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 10/21/2020 | Dr. Stanford Grist                                | Sabra will need a lyft ride for this shift. LG. (Added to shift that Occurs once on 10/21/2020 from 07:00 AM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 10/21/2020 | Dr. Stanford Grist, Sabra Sandee                  | Sabra will need a lyft ride for this shift. LG. (Added to shift that Occurs once on 10/21/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 10/22/2020 | Cindy Galloway, Dr. Stanford Grist                | Dr. Grist is asking Cindy to leave shift. Cindy went outside and sat in her car as instructed. Daughter Stacey aware. Left vm for Tracy Parsons earlier when we couldn't reach Stacey. Stacey will have her mother come over earlier today, but said that Cindy will have to wait outside for the remainder of the shift. CS. (Added to shift that Occurs once on 10/22/2020 from 04:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Cindy Galloway)   |
| 10/22/2020 | Dr. Stanford Grist                                | Does Sabra need Lyft again? -HP. (Added to shift that Occurs once on 10/22/2020 from 06:00 AM EDT to 07:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)   |

| Date       | Related To                         | Description  |
|------------|------------------------------------|--|
| 10/22/2020 | Tracy Parsons, Dr. Stanford Grist  | Spoke with Tracy; verified Dr Grist's Dr appt for next Tuesday. She reiterated how nice it has been for him to always have someone there and for there to not be crises several times per week. She thanked me for our consistency of care and attention to detail.  |
| 10/23/2020 | Dr. Stanford Grist, Jeannie Truman | I need to have Friday October 23 off.  |
| 10/23/2020 | Dr. Stanford Grist, Jeannie Truman | Jeannie Truman. (Added to shift that Occurs once on 10/23/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 10/23/2020 | Harold Hughes, Dr. Stanford Grist  | Jeannie told me to put her back on, she doesn't need this day off anymore -HP. (Added to shift that Occurs once on 10/23/2020 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
|            |                                    | Name: Dr. Stanford Grist   |
|            |                                    | Address: 900 Old Hwy 25 Travelers Rest, SC 29690   |
|            |                                    | ☐  |
|            |                                    | Level of Care: 2   |
|            |                                    | DOB: 4/12/48   |
|            |                                    | Pets: NO   |
|            |                                    | Life Alert: NO   |
|            |                                    | Veteran: NO  |
|            |                                    | Contacts: Daughter Stacy (404) 849-1129 Physician: Daniel Wong, FNP At Galen Healthcare  |
|            |                                    | ALLERGIES: NKAM Medication Location/instructions: Only takes Cialis and vitamins. He takes all when he wakes up at 5am.  |
|            |                                    | Living Will? NO  |
|            |                                    | DNR? NO  |
|            |                                    | Preferred Hospital: No preference  |
|            |                                    | SERVICES REQUIRED:<br>When you arrive to the shift, the ex-wife will be dropping him off. Clock in and hang tight until he arrives. Also she well come back at 7pm so don't make dinner she makes it.  |
|            |                                    | Dr. Stanford Grist is a retired veterinarian that lives in a small cabin on a 400 acre farm. He is still independent with many of his ADLs, but will need a companion to keep him engaged and active. He enjoys being outside and working around his farm. He is passionate about trees. His short term memory is very poor. Caregivers won't need to hover, but we will need to be alert and aware at all times, as Dr. Grist is an elopement risk. His ex-wife Marilyn lives next door.  |
| 10/24/2020 | Dr. Stanford Grist                 | asked Jeannie for this and she may be able to do the 8-2pm...will call back to confirm -KH. (Added to shift that Repeats weekly on Saturday starting on Oct 24, 2020 from 08:00 AM EDT to 07:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 10/24/2020 | Dr. Stanford Grist                 | Mya W said no -HP. (Added to shift that Occurs once on 10/24/2020 from 02:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/24/2020 | Harold Hughes, Dr. Stanford Grist  | I sent Harold the profile and let him know that Lyft would pick him up at 2:15pm-CS. (Added to shift that Occurs once on 10/24/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 10/24/2020 | Harold Hughes, Dr. Stanford Grist  | I verbally covered all care needs with Harold. We are going to get him a lyft ride. CS. (Added to shift that Occurs once on 10/24/2020 from 03:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 10/24/2020 | Harold Hughes, Dr. Stanford Grist  | Lyft Issue so Harold was stuck at Dr. Grist's. Paid him for time he was still at Grist -HP. (Added to carelog: Grist, Dr. Stanford Hughes, Harold: 2020-10-24 19:00:00-04:00 - 2020-10-24 21:00:00-04:00)  |
| 10/27/2020 | Cindy Galloway, Dr. Stanford Grist | Daughter Stacey requested that we don't send Cindy back. CS. (Added to shift that Repeats weekly on Tuesday starting on Oct 27, 2020 from 04:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Cindy Galloway)   |
| 10/27/2020 | Dr. Stanford Grist, Sabra Sandee   | Dr.Grist has an appt for a Yearly Physical @10:30am -Kayla. (Added to shift that Occurs once on 10/27/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 10/28/2020 | Dr. Stanford Grist                 | "I am expecting Tracy Parson's daughter to bring by a lock box by the end of the day today for Dr. Grist. I am running out in just a bit to pick up his new prescriptions so we can deliver everything to his home tomorrow.   |
|            |                                    | Also, if Dr. Grist ever has a fall or emergency during work hours or after-hours please be sure to notify Tracy Parsons as soon as possible. She stated that she wasn't made aware of his fall, only the daughter was, and the doctor has just ordered an x ray for his coccyx as a result of the fall.  |
|            |                                    | Thank you so much!   |
|            |                                    | Christie"  |
| 10/29/2020 | Dr. Stanford Grist                 | Harold will need a ride. LG. (Added to shift that Occurs once on 10/29/2020 from 03:00 PM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/29/2020 | Dr. Stanford Grist, Sabra Sandee   | See note. -HP (Added to shift that Occurs once on 10/29/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 10/29/2020 | Dr. Stanford Grist, Sabra Sandee   | Stacy lvm on on call phone stating that they don't have power so no caregivers are needed today. She said she already sent Sabra away. I called Sabra right away to check in. She said she was sent away and kept talking about all the trees down. I reminded her several times while speaking about the message I sent out a few days ago about calling the office right away if the ex wife or daughter Stacey gives them direction. I told her again that we have to call Tracy to confirm any changes. She said she got my message and she does understand but she's there everyday and it's just confusing with everything. I told her I understood and reminded her again that in the future, she has to call us right away. Tracy Parsons called back to Syncretist to confirm it was okay to cancel today -HP. (Added to shift that Occurs once on 10/29/2020 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Sabra Sandee) |

| Date       | Related To  | Description   |
|------------|---|---|
| 10/29/2020 | Harold Hughes, Dr. Stanford Grist                               | Harold knows today is canceled -HP (Added to shift that Occurs once on 10/29/2020 from 04:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 10/29/2020 | Harold Hughes, Dr. Stanford Grist                               | Tried to call Harold, but went straight to voicemail at 9:45am -HP. (Added to shift that Occurs once on 10/29/2020 from 04:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 10/31/2020 | Ann Crippen, Dr. Stanford Grist                                 | Spoke to Tracy she stated to cancel Saturday since they do not have power. LG (Added to shift that Occurs once on 10/31/2020 from 12:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 10/31/2020 | Dr. Stanford Grist  | Check with Harold in the afternoon on Friday 10/30 to see if he needs a Lyft Ride. As of 10/29 he wasn't sure yet because he is going to look at a car on Fri 10/30. If he needs Lyft then it will need to pre-scheduled -HP. (Added to shift that Occurs once on 10/31/2020 from 06:00 AM EDT to 07:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/31/2020 | Harold Hughes, Dr. Stanford Grist                               | Check to see if they have power. LG. (Added to shift that Occurs once on 10/31/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 10/31/2020 | Harold Hughes, Dr. Stanford Grist                               | Harold got canceled due to no power (Added to shift that Occurs once on 10/31/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 10/31/2020 | Harold Hughes, Dr. Stanford Grist                               | Harold is good for AM only -HP. (Added to shift that Occurs once on 10/31/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 10/31/2020 | Harold Hughes, Dr. Stanford Grist                               | I have called Harold twice to cancel him but have not got a hold of him. LG. (Added to shift that Occurs once on 10/31/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 10/31/2020 | Harold Hughes, Dr. Stanford Grist                               | order a car for Harold for this shift. CP. (Added to shift that Occurs once on 10/31/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 10/31/2020 | Harold Hughes, Dr. Stanford Grist                               | Spoke to Tracy she stated to cancel Saturday since they do not have power. LG. (Added to shift that Occurs once on 10/31/2020 from 08:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 11/02/2020 | Dr. Stanford Grist  | I went to set up Dr. Grist's medications. He did not have enough vitamins to set up for more than a week. Stacey was notified and is going to reorder them. Tracy asked if I thought he needed the x-ray of his coccyx. I told her that we have to follow doctor's orders and I cannot say that he doesn't need it. His mobility is very good and he has not c/o pain. He stated that he doesn't need an x-ray. He was planting large magnolia trees while I was there. He is very pleasantly confused and very sweet.  |
| 11/02/2020 | Dr. Stanford Grist  | Set up medications on Monday per Tracey Parsons   |
| 11/04/2020 | Dr. Stanford Grist  | Email sent to dtr, Stacey this morning: BCC'd Tracy Parsons   |
|            |   | Stacey,<br>I have attached the statement of account for Dr. Grist. I received your check in the amount of \$5,072.95 which paid for 2 invoices dated 9/21 and 10/5. I also received your check in the amount of \$5,000 that was dated 11/1/20. That money was applied to the 10/19 and 11/2 invoices. There is now a balance due of \$692.34 on the account. Please advise on when the next payment on account will be mailed. Thanks so much.   |
| 11/04/2020 | Dr. Stanford Grist  | Email Tracy MAR   |
| 11/04/2020 | Laura Garran, Harold Hughes, Dr. Stanford Grist, Jeannie Truman | Hey caregivers! I wanted to let you all know that Dr. Grist now has a medicine organizer. Please see below for the updated information. Please call the office if you have any questions. 864-268-8993. Thank you for all that you do!<br><br>Give medications from medicine organizer on the kitchen counter. He takes all of his medication in the morning. His prescription bottles and additional medicine organizers are in a lock box in the kitchen. The key for the lock box is hanging on the cork board beside the dining room table. CK nurse will set up all medications  |
| 11/05/2020 | Dr. Stanford Grist  | Brandi needs intro -HP. (Added to shift that Occurs once on 11/05/2020 from 06:00 AM EST to 07:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 11/05/2020 | Dr. Stanford Grist, Brandi Wallace                              | Lindsay tried to call Brandi and text her multiple times yesterday with no response. She was a no show this morning -HP (Added to shift that Occurs once on 11/05/2020 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Brandi Wallace)  |
| 11/05/2020 | Dr. Stanford Grist, Sabra Sandee, Robin Marler                  | Dr. Grist didn't take his meds yesterday, so I sent a reminder to all caregivers scheduled there to ensure that he takes his AM meds daily. I also added a medication reminder task to his first shifts. New caregiver Robin Marler was there yesterday.<br><br>Also, Stacey called the office because there were two Amazon charges to his credit card from 10/19 and 10/22. Dr. Grist does not have an Amazon account. Sabra was scheduled both days, so I called her and she stated that she ordered some special glue to fix his New Balances that he wears every day along with a book about his condition because he wanted to learn more. I told Sabra that going forward we cannot make unauthorized charges on Dr. Grist's credit card without approval ahead of time from Stacey.<br><br>When I spoke to Stacey I let her know that the charges were just for shoe glue and "a book". |
| 11/05/2020 | Laura Garran, Lindsay Greene, Harold Hughes, Dr. Stanford Grist | Happy Thursday everyone! Please be sure that Dr. Grist is taking his morning medications daily as scheduled. Our nurse Cassandra has filled all medications into a daily pill planner. If Dr. Grist ever refuses meds, etc. please notify us at the office immediately. Thank you for all that you do!  |
| 11/07/2020 | Harold Hughes, Dr. Stanford Grist                               | Reminded Harold of his Saturday shift with Dr. Grist -HP. (Added to shift that Occurs once on 11/07/2020 from 02:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 11/09/2020 | Dr. Stanford Grist  | Order OTC meds  |
| 11/10/2020 | Dr. Stanford Grist  | Check with Stacey Monday to make sure they arrived.<br>Call Sabra to see if the meds are there.<br>They arrived. Will go this afternoon to fill med box.  |
| 11/11/2020 | Laura Garran, Lindsay Greene, Harold Hughes, Dr. Stanford Grist | Good morning everyone! Please notify our office immediately (864) 268-8993 if Dr. Grist doesn't take his medication, has an upset stomach, or doesn't want to eat. Dr. Grist has a court appointed guardian that we must notify of all changes, even the ones that may seem small. If you ever have questions about anything, don't hesitate to reach out to us. We are happy to help any time! Thank you for all that you do- you are all so appreciated!  |
| 11/14/2020 | Dr. Stanford Grist, Jeannie Truman                              | Please cancel this Saturday only, per Tracy.<br><br>Thank you!. (Added to shift that Occurs once on 11/14/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |

| Date       | Related To                         | Description   |
|------------|------------------------------------|---|
| 11/14/2020 | Dr. Stanford Grist, Jeannie Truman | Tracy canceled this shift, Jeannie is aware not to go. LG (Added to shift that Occurs once on 11/14/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 11/14/2020 | Dr. Stanford Grist, Sabra Sandee   | Please cancel this Saturday only, per Tracy. Thank you. Sabra knows not to go. LG (Added to shift that Occurs once on 11/14/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 11/14/2020 | Dr. Stanford Grist, Sabra Sandee   | Please cancel this Saturday only, per Tracy.  |
| 11/18/2020 | Dr. Stanford Grist                 | Thank you!. (Added to shift that Occurs once on 11/14/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 11/18/2020 | Dr. Stanford Grist, Robin Marler   | Sabra - NO.. (Added to shift that Occurs once on 11/18/2020 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 11/26/2020 | Dr. Stanford Grist                 | Intro caregiver at 8am I went and did the intro and she was good to go. She was dress in CK t-shirt and scrub pants. Had her name badge on and a mask. ~LIG   |
| 11/26/2020 | Dr. Stanford Grist                 | I emailed Tracy about Thanksgiving. LG. (Added to shift that Occurs once on 11/26/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 11/26/2020 | Dr. Stanford Grist                 | Per Tracy, NO to Thanksgiving. Cancel this shift. LG (Added to shift that Occurs once on 11/26/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 11/26/2020 | Dr. Stanford Grist, Sabra Sandee   | I emailed Tracy about Thanksgiving. LG. (Added to shift that Occurs once on 11/26/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 11/26/2020 | Dr. Stanford Grist, Sabra Sandee   | Per Tracy, NO to Thanksgiving. Cancel this shift. LG. (Added to shift that Occurs once on 11/26/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 11/26/2020 | Dr. Stanford Grist, Sabra Sandee   | Sabra knows not to go -BMP (Added to shift that Occurs once on 11/26/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 11/26/2020 | Harold Hughes, Dr. Stanford Grist  | Harold needs off 11/25 and 11/26 -HP. (Added to shift that Occurs once on 11/26/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 11/27/2020 | Dr. Stanford Grist                 | Per Tracy, Cancel this shift. LG (Added to shift that Occurs once on 11/27/2020 from 02:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 11/27/2020 | Dr. Stanford Grist, Jeannie Truman | Per Tracy, Cancel this shift, Jeannie knows not to go, LG (Added to shift that Occurs once on 11/27/2020 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 11/27/2020 | Dr. Stanford Grist, Jeannie Truman | Per Tracy, Cancel this shift. LG. (Added to shift that Occurs once on 11/27/2020 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 11/28/2020 | Dr. Stanford Grist                 | Per Tracy, Cancel this shift. LG (Added to shift that Occurs once on 11/28/2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 11/30/2020 | Dr. Stanford Grist, Sabra Sandee   | I went and picked CG Sabra Sandee because her car broke down. The clients house/yard is starting to look great. Caregiver said she has been working with the client to get it in shape.~LJG   |
| 12/01/2020 | Dr. Stanford Grist                 | Reordered Cialis from Costco. Make sure someone picks it up before Friday when meds are due.  |
| 12/02/2020 | Dr. Stanford Grist                 | Daughter stated she picked them up.   |
| 12/02/2020 | Dr. Stanford Grist                 | Follow up to make sure all OTC meds and Cialis picked up.   |
| 12/02/2020 | Dr. Stanford Grist, Dimitar Spasov | Have we received payment on account?  |
| 12/02/2020 | Dr. Stanford Grist, Dimitar Spasov | Dimitar lost sight of Dr. Grist. Daughter Stacey is aware. CG Jeannie Truman will be there in a minute and Stacey has asked that they try to locate him. Stacey said that Dr. Grist complains about Dimitar and said that he isn't a good fit. Tracy Parsons also sent an email requesting that he be pulled. CS  |
| 12/02/2020 | Dr. Stanford Grist, Dimitar Spasov | Heather notified me that Dimitar is with Dr. Grist and he is out of the gate trying to get away from him. Called daughter Stacey and notified her immediately. Stacey believes that Dr. Grist isn't getting outside enough and it's causing agitation. I am sending a message to all caregivers letting them know to please take him outside, weather permitting. I made Tracy Parsons aware as well and she has requested to add overnights Wed, Thurs and Fri each week starting as soon as we can. She is aware that it will NOT be this week, but I told her we would aim for next week and see what we can do. |
| 12/02/2020 | Dr. Stanford Grist, Sabra Sandee   | Tracy also suggested that he needs to get outside more and asked that we provide hand warmers and feet warmers for our caregivers to make being outside in the cold more tolerable.   |
| 12/02/2020 | Dr. Stanford Grist, Sabra Sandee   | Thank you!<br>Hey, I know you are not with Dr. Grist today but will you let me know tomorrow if they haven't gotten his medicine from Costco? I can get it if I need to. I also need to find out if they got his vitamins. Can you just shoot me a text tomorrow to let me know?  |
| 12/02/2020 | Stacey Grist                       | Thanks!<br>Cassandra<br>thanks i put the check in the mail today  |
| 12/02/2020 | Stacey Grist                       | stacey  |
| 12/02/2020 | Stacey Grist                       | On Wed, Dec 2, 2020 at 1:07 PM Brandie Evans <ckupstatesc+de31105e1c95412eb042b0041600b098+0A@clearcaremail.com> wrote:<br><br>> Greetings from Comfort Keepers - Upstate!<br>><br>> You have a new invoice ready for viewing and payment:<br>> *Invoice Number:* mCmC65105<br>> *Due Date:* 11/30/2020<br>> *Original Amount:* \$2,282.75<br>> *Outstanding Amount:* \$2,282.75<br>> View & Pay Invoice<br>><br>><br>><br>> Thank you!<br>> Brandie Evans  |
| 12/03/2020 | Dr. Stanford Grist                 | Dr. Grist has follow up labs on Dec 9th and f/u appt with PCP on Dec 16th. Make sure Tracy has MAR. She is going ask PCP about Terbinafide and review current meds.   |
| 12/03/2020 | Dr. Stanford Grist, Sabra Sandee   | Dr Grist's power was out so they don't need her until 11am. Still paying her for her time. She will go to his wife's office at 11am to pick him up -HP. (Added to shift that Repeats weekly on Thursday starting on Dec 03, 2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 12/05/2020 | Dr. Stanford Grist                 | Dimitar does not want to return due to client being "pissed" -BMP (Added to shift that Occurs once on 12/05/2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/05/2020 | Dr. Stanford Grist                 | Offered Jeannie this shift, waiting on her to let me know. LG. (Added to shift that Occurs once on 12/05/2020 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |

| Date       | Related To                          | Description  |
|------------|-------------------------------------|--|
| 12/05/2020 | Dr. Stanford Grist, Dimitar Spasov  | "Dear all,<br><br>I don't think we need to schedule Demetre again.   |
| 12/05/2020 | Dr. Stanford Grist, Dimitar Spasov  | Tracy Parsons" (Added to shift that Occurs once on 12/05/2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Dimitar Spasov)<br>Stacey said that Dr. Grist complains about Dimitar and said that he isn't a good fit. I don't know how much truth there is to this, but I have made Dimitar's shifts red. -CS. (Added to shift that Occurs once on 12/05/2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Dimitar Spasov)   |
| 12/05/2020 | Dr. Stanford Grist, Jeannie Truman  | Texted wknd reminder. - JA. (Added to shift that Occurs once on 12/05/2020 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 12/05/2020 | Dr. Stanford Grist, Sabra Sandee    | Left VM about wknd calls - JA. (Added to shift that Occurs once on 12/05/2020 from 02:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 12/07/2020 | Dr. Stanford Grist                  | Tracy: "Happy Monday! I went to Cabela's today and purchased 10 of each- hand and foot warmers for the caregivers to keep on hand. Cassandra will deliver those tomorrow when she makes her nursing visit for the meds. We have also encouraged all to make sure Dr. Grist is getting plenty of time outdoors.<br><br>Thank you,<br><br>Christie Svardar"<br>Spoke to Tracy and Stacy they said if we can not find someone for tonight by 7pm just let them know and they will come get him. LG. (Added to shift that Occurs once on 12/09/2020 from 10:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; no caregiver assigned) |
| 12/09/2020 | Dr. Stanford Grist                  | Tracy Parsons requested to add overnights every W, Thurs and Fri making Dr. Grist's schedule 24/7 W-Sat at 7pm. CS. (Added to shift that Repeats weekly on Wednesday starting on Dec 10, 2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/09/2020 | Dr. Stanford Grist, Sabra Sandee    | Tonight and tomorrow night, Katherine will be staying the night with Dr Grist. Thank you!!   |
| 12/09/2020 | Katherine Gomez, Dr. Stanford Grist | Katherine can not work this shift. LG (Added to shift that Occurs once on 12/09/2020 from 10:00 PM EST to 06:00 AM EST for Dr. Stanford Grist; assigned to caregiver Katherine Gomez)  |
| 12/10/2020 | Dr. Stanford Grist                  | Could not cover this shift, Tracy and Stacy are aware. LG. (Added to shift that Occurs once on 12/10/2020 from 10:00 PM EST to 06:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/10/2020 | Katherine Gomez, Dr. Stanford Grist | Katherine can not work tonight due to a personal matter. LG (Added to shift that Occurs once on 12/10/2020 from 10:00 PM EST to 06:00 AM EST for Dr. Stanford Grist; assigned to caregiver Katherine Gomez)  |
| 12/11/2020 | Dr. Stanford Grist                  | Let Dr. Grist's daughter know what OTC meds need so be reordered.<br><br>I let her know. She said that she will reorder them and get them over there ASAP.   |
| 12/11/2020 | Dr. Stanford Grist                  | Spoke to Mary R about the overnights and she is going to let me know tonight or tomorrow if she can work the overnight or the dayshift on Saturday. LG. (Added to shift that Occurs once on 12/11/2020 from 09:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/11/2020 | Dr. Stanford Grist                  | Tracy and Stacy are aware we do not have someone for this shift. LG. (Added to shift that Occurs once on 12/11/2020 from 09:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/12/2020 | Dr. Stanford Grist                  | Sabra- NO. (Added to shift that Repeats weekly on Saturday starting on Dec 12, 2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/14/2020 | Dr. Stanford Grist                  | Double check that Harold is not supposed to stay until 9:30 pm every Monday night. Stacey made it seem like one-time thing last week, but please double check. - JA. (Added to shift that Occurs once on 12/14/2020 from 09:00 AM EST to 10:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/14/2020 | Dr. Stanford Grist                  | Harold Hughes called to report that a pine tree is about to fall on the corner of the house. Talked with Lindsay to notify the Family.   |
| 12/14/2020 | Harold Hughes, Dr. Stanford Grist   | Harold is good to stay until 9:30pm.<br>LG. (Added to shift that Occurs once on 12/14/2020 from 03:00 PM EST to 09:30 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 12/14/2020 | Harold Hughes, Dr. Stanford Grist   | Stacy called and would like to extend the shift to 9:30p her son has a baseball game!-ab. (Added to shift that Occurs once on 12/14/2020 from 03:00 PM EST to 09:30 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 12/15/2020 | Dr. Stanford Grist                  | Spoke to Stacey, she is aware Jeannie will be there at 1pm. Dr. Grist is at work with Marilyn and we will pick him up from there. LG (Added to shift that Occurs once on 12/15/2020 from 08:00 AM EST to 01:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/15/2020 | Dr. Stanford Grist, Jeannie Truman  | Spoke to Stacey, she is aware Jeannie will be there at 1pm. Dr. Grist is at work with Marilyn and we will pick him up from there. LG. (Added to shift that Occurs once on 12/15/2020 from 01:00 PM EST to 05:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 12/15/2020 | Dr. Stanford Grist, Sabra Sandee    | Sabra is sick and can not work today. LG (Added to shift that Occurs once on 12/15/2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)  |
| 12/16/2020 | Dr. Stanford Grist, Sabra Sandee    | Sabra has an appointment this day and can not work. LG. (Added to shift that Occurs once on 12/16/2020 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 12/16/2020 | Mary Roldan, Dr. Stanford Grist     | Tracy and Stacy were aware Mary was coming overnight but Marilyn showed up and Dr. Grist wanted to go with her. Pay caregiver and charger client. LG. (Added to shift that Occurs once on 12/16/2020 from 04:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/17/2020 | Dr. Stanford Grist                  | Beth said NO. LG. (Added to shift that Repeats weekly on Thursday starting on Dec 18, 2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/17/2020 | Dr. Stanford Grist                  | I emailed Tracy to make her aware we are still working on the overnights. LG. (Added to shift that Repeats weekly on Thursday starting on Dec 18, 2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/17/2020 | Dr. Stanford Grist                  | Lori spoke to Tracy to make her aware we do not have someone to cover this overnight for tonight or tomorrow night. LG. (Added to shift that Occurs once on 12/17/2020 from 07:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/17/2020 | Dr. Stanford Grist                  | Sabra will be pulled. Lori is putting a new male caregiver on the shift -HP. (Added to shift that Occurs once on 12/17/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/17/2020 | Dr. Stanford Grist, Andrew Edwards  | New caregiver intro at 8am.<br>Andrew was very polite and professional. Him and Dr. Grist seemed to get along. He reacted well when Dr. Grist was able to find his words and answer some questions.  |
| 12/17/2020 | Dr. Stanford Grist, Sabra Sandee    | Brandon has handled canceling Sabra permanently -HP (Added to shift that Occurs once on 12/17/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Sabra Sandee)   |
| 12/18/2020 | Dr. Stanford Grist                  | Lori called back to state that Tracy wasn't aware that we weren't filling this shift. Lori said that Tracy would like us to try to fill it -HP. (Added to shift that Occurs once on 12/18/2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/18/2020 | Dr. Stanford Grist                  | Lori spoke to Tracy to make her aware we do not have someone to cover this overnight for tonight or tomorrow night. LG. (Added to shift that Occurs once on 12/18/2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/18/2020 | Dr. Stanford Grist                  | Tracy is aware we do not have someone -BMM. (Added to shift that Occurs once on 12/18/2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/19/2020 | Dr. Stanford Grist, Andrew Edwards  | Marilyn relieved Andrew at 6:30 and took Dr. Grist to her home. Andrew did not know there was anyone relieving him at 7pm so he left the shift without notifying CK. CS. (Added to shift that Occurs once on 12/19/2020 from 01:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |

| Date       | Related To                          | Description   |
|------------|-------------------------------------|---|
| 12/19/2020 | Mary Roldan, Dr. Stanford Grist     | Mary called upon arrival and said the property was pitch black, Dr. Grist was nowhere to be found, she she heard gunshots. I called Andrew and he said that Marilyn came to get Dr. Grist around 6:30 and he had already left. I called Tracy P to let her know. I asked her if I could send Mary home and pay her for her shift and she replied "yes". I also asked if Andrew could come in at 8am per Marilyn's instruction to which she also replied "yes" and stated we would discuss more tomorrow. I also made her aware that there are gunshots on the property. I apologized to Mary and told her she was good to go and would be paid. CS. (Added to shift that Occurs once on 12/19/2020 from 07:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 12/20/2020 | Dr. Stanford Grist                  | Lori told Tracy we are still working on this shift at this time. LG. (Added to shift that Occurs once on 12/20/2020 from 07:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/20/2020 | Dr. Stanford Grist, Andrew Edwards  | Lori got Andrew's other shift covered and got him to cover this shift -HP. (Added to shift that Occurs once on 12/20/2020 from 07:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)   |
| 12/20/2020 | Dr. Stanford Grist, Andrew Edwards  | Marilyn told Andrew to come at 8 instead of 7. I called Tracy P and she approved this change. CS. (Added to shift that Occurs once on 12/20/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |
| 12/21/2020 | Dr. Stanford Grist                  | **SENT TO LB AND TRACY PARSONS**<br><br>Lorri and Tracy,<br><br>Andrew Edwards called today and reported that Dr. Grist seemed "off". He stated that normally Dr. Grist responds when Andrew talks to him, but today Andrew was concerned because Dr. Grist had very delayed responses. Andrew mentioned it taking Dr. Grist up to five minutes to get a response, or Andrew could get no response at all from him. Andrew described him as being "out of it a little bit". Andrew made me aware there is a doctor's appointment tomorrow, and I have reached out to Harold Hughes to make the office aware if this behavior continues while on his shift. I just wanted to reach out to you both and make you aware. I am not fully aware of Dr. Grist's situation since I am not involved in the Client Care/ICC team, but I did want to relay the message. Thanks! |
| 12/22/2020 | Dr. Stanford Grist, Andrew Edwards  | Please let Andrew know to come in at 7. Dr Grist has appointment at 8:15 at Innervision, One Marcus Drive, Suite 101 Greenville, SC 29615...864-242-2020. (Added to shift that Occurs once on 12/22/2020 from 07:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |
| 12/22/2020 | Mary Roldan, Dr. Stanford Grist     | Mary is aware of the appointment for tomorrow. LG. (Added to shift that Occurs once on 12/22/2020 from 07:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/23/2020 | Dr. Stanford Grist                  | Harold said no -HP. (Added to shift that Occurs once on 12/23/2020 from 04:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/23/2020 | Jason Corpening, Dr. Stanford Grist | I spoke with Jason and informed him he does not have to go to Dr. Grist - AK (Added to shift that Occurs once on 12/23/2020 from 12:00 PM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 12/23/2020 | Jason Corpening, Dr. Stanford Grist | I spoke with Jason and informed him he does not have to go to Dr. Grist - AK. (Added to shift that Occurs once on 12/23/2020 from 12:00 PM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)   |
| 12/23/2020 | Jason Corpening, Dr. Stanford Grist | Tryon will handle Jason spoke to Lori and Ashley. LG. (Added to shift that Occurs once on 12/23/2020 from 12:00 PM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)   |
| 12/23/2020 | Mary Roldan, Dr. Stanford Grist     | Lindsey<br><br>I spoke with Stacey yesterday and we will cancel caregivers for Dr Grist Christmas Eve, Christmas Day and the day after. I know this will affect the overnights. I'm not sure at this point about New Years. I will be in touch. I'm thinking we will need coverages for those days.<br><br>Tracy. (Added to shift that Occurs once on 12/23/2020 from 09:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 12/23/2020 | Mary Roldan, Dr. Stanford Grist     | Mary knows not to go. LG (Added to shift that Occurs once on 12/23/2020 from 09:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/23/2020 | Mary Roldan, Dr. Stanford Grist     | Spoke with Stacy and Tracy on 3-way call. They will keep Wednesday night.. (Added to shift that Occurs once on 12/23/2020 from 09:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/24/2020 | Dr. Stanford Grist                  | Lindsey<br><br>I spoke with Stacey yesterday and we will cancel caregivers for Dr Grist Christmas Eve, Christmas Day and the day after. I know this will affect the overnights (Added to shift that Occurs once on 12/24/2020 from 07:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 12/24/2020 | Harold Hughes, Dr. Stanford Grist   | Harold knows not to go. LG (Added to shift that Occurs once on 12/24/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 12/24/2020 | Mary Roldan, Dr. Stanford Grist     | Mary knows not to go. LG (Added to shift that Occurs once on 12/24/2020 from 09:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/25/2020 | Dr. Stanford Grist, Jeannie Truman  | Jeannie knows not to go. LG (Added to shift that Occurs once on 12/25/2020 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 12/25/2020 | Dr. Stanford Grist, Jeannie Truman  | Lindsey I spoke with Stacey yesterday and we will cancel caregivers for Dr Grist Christmas Eve, Christmas Day and the day after. I know this will affect the overnights. I'm not sure at this point about New Years. I will be in touch. I'm thinking we will need coverages for those days. Tracy. (Added to shift that Occurs once on 12/25/2020 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 12/25/2020 | Mary Roldan, Dr. Stanford Grist     | Mary knows not to go. LG (Added to shift that Occurs once on 12/25/2020 from 09:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/26/2020 | Dr. Stanford Grist                  | Cancel this shift. LG (Added to shift that Occurs once on 12/26/2020 from 08:00 AM EST to 03:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/26/2020 | Dr. Stanford Grist                  | Lindsey I spoke with Stacey yesterday and we will cancel caregivers for Dr Grist Christmas Eve, Christmas Day and the day after. I know this will affect the overnights. I'm not sure at this point about New Years. I will be in touch. I'm thinking we will need coverages for those days. Tracy. (Added to shift that Occurs once on 12/26/2020 from 08:00 AM EST to 03:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/26/2020 | Mary Roldan, Dr. Stanford Grist     | Lindsey I spoke with Stacey yesterday and we will cancel caregivers for Dr Grist Christmas Eve, Christmas Day and the day after. I know this will affect the overnights. I'm not sure at this point about New Years. I will be in touch. I'm thinking we will need coverages for those days. Tracy. (Added to shift that Occurs once on 12/26/2020 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 12/26/2020 | Mary Roldan, Dr. Stanford Grist     | Mary knows not to go. LG (Added to shift that Occurs once on 12/26/2020 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 12/28/2020 | Dr. Stanford Grist                  | Make sure Stacey ordered all 5 OTC meds and that they are there.  |
| 12/29/2020 | Mary Roldan, Dr. Stanford Grist     | Mary state she needs off tomorrow due to being tested for COVID. LG (Added to shift that Occurs once on 12/29/2020 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 12/30/2020 | Dr. Stanford Grist                  | No overnights at this time. LG (Added to shift that Occurs once on 12/30/2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |

| Date       | Related To                         | Description  |
|------------|------------------------------------|--|
| 12/30/2020 | Dr. Stanford Grist                 | <p>Tracy,</p> <p>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.</p> <p>Thank you,</p> <p>Christie Snyder. (Added to shift that Repeats weekly on Wednesday starting on Dec 31, 2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)</p>  |
| 12/30/2020 | Dr. Stanford Grist, Andrew Edwards | <p>Hey Andrew! I know that you have been back with Dr. Grist this week. Do you know if his daughter brought him 3 more bottles of vitamins? Will you let me know tomorrow when you go back? It is Vitamin C, Iodoral and Glucosamine Chondroitin.</p> <p>Thanks so much!<br/>Cassandra</p>   |
| 12/31/2020 | Dr. Stanford Grist                 | No overnights at this time. LG (Added to shift that Occurs once on 12/31/2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/31/2020 | Dr. Stanford Grist                 | only need care until 2:30 pm on Thursday per Stacey -JA. (Added to shift that Occurs once on 12/31/2020 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/31/2020 | Dr. Stanford Grist                 | <p>Tracy,</p> <p>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.</p> <p>Thank you,</p> <p>Christie Snyder. (Added to shift that Occurs once on 12/31/2020 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 12/31/2020 | Dr. Stanford Grist                 | <p>Tracy,</p> <p>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.</p> <p>Thank you,</p> <p>Christie Snyder. (Added to shift that Occurs once on 12/31/2020 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 12/31/2020 | Harold Hughes, Dr. Stanford Grist  | Harold knows not to go.LG (Added to shift that Occurs once on 12/31/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 12/31/2020 | Harold Hughes, Dr. Stanford Grist  | <p>Tracy,</p> <p>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.</p> <p>Thank you,</p>   |
| 01/01/2021 | Dr. Stanford Grist                 | Christie Snyder. (Added to shift that Occurs once on 12/31/2020 from 04:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 01/01/2021 | Dr. Stanford Grist                 | No care needed. LG (Added to shift that Occurs once on 01/01/2021 from 02:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/01/2021 | Dr. Stanford Grist                 | <p>No overnights at this time. LG (Added to shift that Occurs once on 01/01/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)</p> <p>Tracy,</p> <p>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.</p> <p>Thank you,</p> <p>Christie Snyder. (Added to shift that Occurs once on 01/01/2021 from 02:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)</p> |

| Date       | Related To                                    | Description  |
|------------|---|--|
| 01/01/2021 | Dr. Stanford Grist                            | Tracy,<br><br>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.<br><br>Thank you,<br><br>Christie Snyder. (Added to shift that Occurs once on 01/01/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)                |
| 01/01/2021 | Dr. Stanford Grist, Jeannie Truman            | No care needed due to New Years, Jeannie knows not to go. LG (Added to shift that Occurs once on 01/01/2021 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 01/01/2021 | Dr. Stanford Grist, Jeannie Truman            | Tracy,<br><br>We are working on our holiday schedules for Christmas Eve, Christmas Day, NYE, and New Years Day. Per usual, these are all holidays that our hourly rate will double because we pay our caregivers double time pay for Holiday pay. Should we keep all regularly scheduled shifts for Dr. Grist on those days? Please advise.<br><br>Thank you,<br><br>Christie Snyder. (Added to shift that Occurs once on 01/01/2021 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman) |
| 01/02/2021 | Mary Roldan, Dr. Stanford Grist               | No care needed for this Saturday, Mary knows not to go. LG (Added to shift that Occurs once on 01/02/2021 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 01/04/2021 | Christine "Chris" Simmons, Dr. Stanford Grist | Hey Chris! I am planning on coming tomorrow afternoon to set up Dr. Grist's medications. Do you all need anything when I come? Any supplies? Let me know. Thanks!  |
| 01/05/2021 | Dr. Stanford Grist                            | Email Tracey about Dr. GRIST meds  |
| 01/06/2021 | Dr. Stanford Grist                            | I have spoke to Stacy she said they do not know if they will need overnights. She wants to talk to Tracy at this time. LG. (Added to shift that Occurs once on 01/06/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/06/2021 | Dr. Stanford Grist                            | Stacy called to let us know she received the email and wanted to confirm the times that they would be without care. Went over the schedule with her -KH (Added to shift that Occurs once on 01/06/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/06/2021 | Dr. Stanford Grist                            | Stacy called to let us know she received the email and wanted to confirm the times that they would be without care. Went over the schedule with her -KH. (Added to shift that Occurs once on 01/06/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/07/2021 | Dr. Stanford Grist                            | Stacy called to let us know she received the email and wanted to confirm the times that they would be without care. Went over the schedule with her -KH (Added to shift that Occurs once on 01/07/2021 from 09:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/07/2021 | Harold Hughes, Dr. Stanford Grist             | Stacy asked if on Thursday and Friday if they could stay until 9pm. LG. (Added to shift that Occurs once on 01/07/2021 from 02:30 PM EST to 09:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/08/2021 | Dr. Stanford Grist                            | He will NOT have school on Fridays, so he will be available for Dr. Grist until 3:30 M-Th and then all day Friday. He has also agreed to work every other Saturday with him.   |
| 01/08/2021 | Dr. Stanford Grist                            | I told him v'all would get ahold of him to confirm. Hope this helps!! -Lori Bvers. (Added to shift that Occurs once on 01/08/2021 from 08:00 AM EST to 09:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/08/2021 | Dr. Stanford Grist                            | Stacy called to let us know she received the email and wanted to confirm the times that they would be without care. Went over the schedule with her -KH (Added to shift that Occurs once on 01/08/2021 from 09:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/08/2021 | Jason Corpening, Dr. Stanford Grist           | Per Lori Jason does not feel comfortable going to Dr. Grist today since Marilyn told Jason that a caregiver tested Positive for COVID. I told Lori no one that we know of has tested Positive. Marilyn also told Jason that Dr. Grist is having stomach issues and Jason thinks it is COVID and does not want to go.LG. (Added to shift that Occurs once on 01/08/2021 from 02:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 01/09/2021 | Dr. Stanford Grist, Andrew Edwards            | I confirmed Andrew's weekend reminder -HP. (Added to shift that Occurs once on 01/09/2021 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |
| 01/11/2021 | Dr. Stanford Grist                            | Called and texted Harold to come in -BMM. (Added to shift that Occurs once on 01/11/2021 from 12:00 PM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | asking Mya if she will switch. LG. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/12/2021 | Dr. Stanford Grist                            | Brenda s. NO. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Called Jason, no answer. LVM -HP. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Cassie and Jason I have called. LG. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Cassie L NO. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/12/2021 | Dr. Stanford Grist                            | Cassie- NO. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Delaine NO. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | I asked Rebecca W -BMM. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Rebecca W NO. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | sent out a test to Tryon CG spoke to Ashley in Tryon. LG. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Susie Babb NO -BMM. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist                            | Tried Deloris and Delaine _BMM. (Added to shift that Occurs once on 01/12/2021 from 03:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/12/2021 | Dr. Stanford Grist, Andrew Edwards            | Has called me and let me know that his babysitter is out of town and he cannot work tomorrow, either. I'm just about sick of him, and I'm sure you are too. I'll let you decide what to do about keeping him on Dr Grist's schedule. Let me know what you decide. Sorry!! Lorri B emailed me. LG. (Added to shift that Occurs once on 01/12/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)   |
| 01/12/2021 | Dr. Stanford Grist, Andrew Edwards            | Has called me and let me know that his babysitter is out of town and he cannot work tomorrow, either. I'm just about sick of him, and I'm sure you are too. I'll let you decide what to do about keeping him on Dr Grist's schedule. Let me know what you decide (Added to shift that Occurs once on 01/12/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |
| 01/13/2021 | Dr. Stanford Grist                            | I called Tracy to check on this, Stacy stated to cancel tomorrow day and overnight since Dr. Grist will be with his lawyer all day tomorrow. LG (Added to shift that Occurs once on 01/13/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/13/2021 | Dr. Stanford Grist                            | I called Tracy to check on this, Stacy stated to cancel tomorrow day and overnight since Dr. Grist will be with his lawyer all day tomorrow. LG. (Added to shift that Repeats weekly on Wednesday starting on Jan 14, 2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/13/2021 | Dr. Stanford Grist, Andrew Edwards            | Check on Andrew -HP. (Added to shift that Occurs once on 01/13/2021 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |
| 01/13/2021 | Dr. Stanford Grist, Andrew Edwards            | I called Tracy to check on this, Stacy stated to cancel tomorrow day and overnight since Dr. Grist will be with his lawyer all day tomorrow. LG. (Added to shift that Occurs once on 01/13/2021 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |

| Date       | Related To                          | Description   |
|------------|-------------------------------------|---|
| 01/13/2021 | Dr. Stanford Grist, Andrew Edwards  | Spoke to Tracy she said to cancel tomorrow, I have called Andrew and Jason to make them aware not to go and I have a voicemail and text into both of them to not go tomorrow. LG (Added to shift that Occurs once on 01/13/2021 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)   |
| 01/13/2021 | Dr. Stanford Grist, Andrew Edwards  | Spoke to Tracy she said to cancel tomorrow, I have called Andrew and Jason to make them aware not to go and I have a voicemail and text into both of them to not go tomorrow. LG. (Added to shift that Occurs once on 01/13/2021 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)  |
| 01/13/2021 | Jason Corpening, Dr. Stanford Grist | I called Tracy to check on this, Stacy stated to cancel tomorrow day and overnight since Dr. Grist will be with his lawyer all day tomorrow. LG. (Added to shift that Occurs once on 01/13/2021 from 12:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 01/13/2021 | Jason Corpening, Dr. Stanford Grist | Spoke to Tracy she said to cancel tomorrow, I have called Andrew and Jason to make them aware not to go and I have a voicemail and text into both of them to not go tomorrow. LG (Added to shift that Occurs once on 01/13/2021 from 12:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 01/13/2021 | Jason Corpening, Dr. Stanford Grist | Spoke to Tracy she said to cancel tomorrow, I have called Andrew and Jason to make them aware not to go and I have a voicemail and text into both of them to not go tomorrow. LG. (Added to shift that Occurs once on 01/13/2021 from 12:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jason Corpening)   |
| 01/14/2021 | Dr. Stanford Grist                  | "Tracy,<br><br>I hope you are doing well! I just wanted to touch base with you and let you know that we feel it may make the most sense for myself and Cassandra to take over as Dr. Grist's Client Care Coordinators to better centralize communication regarding his care. I would be the primary contact for communication regarding care going forward and Cassandra will continue making nursing/med visits. What are your thoughts? I am out of the office today, but I wanted to touch base and let you know that this is something we discussed.<br><br>Thank you,<br><br>Christie Snyder"<br>Cassidy Goode no. LW. (Added to shift that Occurs once on 01/14/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)<br>I have asked:<br>Wanda P<br>Bonnie P<br>Maria V<br>Nancy B<br>Ana A<br>Kim A.<br>Shirley M.<br>Rachel B NO<br>Scott NO<br>Mya W NO |
| 01/14/2021 | Dr. Stanford Grist                  | No overnight needed. LG (Added to shift that Occurs once on 01/14/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/14/2021 | Dr. Stanford Grist                  | SM to Spartanburg caregivers. LW. (Added to shift that Occurs once on 01/14/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/14/2021 | Dr. Stanford Grist                  | SM to Tamara Crawley and Damaris Hernandez. LW. (Added to shift that Occurs once on 01/14/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/14/2021 | Dr. Stanford Grist                  | Spoke to Tracy to let her know what is going on, she stated to all Stacy make her aware. I have a voicemail out to Stacy and will call her in the morning with a update if I do not heard back from her tonight LG. (Added to shift that Occurs once on 01/14/2021 from 08:00 AM EST to 01:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/14/2021 | Dr. Stanford Grist                  | Tiffany Bain no. LW. (Added to shift that Occurs once on 01/14/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/14/2021 | Dr. Stanford Grist                  | Tracy is going to let me know if the overnights are needed. LG. (Added to shift that Occurs once on 01/14/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/14/2021 | Dr. Stanford Grist                  | Wife could potentially be in the hospital with pregnancy complications and he has no childcare. LW (Added to shift that Occurs once on 01/14/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/14/2021 | Harold Hughes, Dr. Stanford Grist   | Harold called Prisma and the nurse said he did not need to be tested. LG. (Added to shift that Occurs once on 01/14/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 01/14/2021 | Harold Hughes, Dr. Stanford Grist   | Harold still not feeling well LG (Added to shift that Occurs once on 01/14/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/15/2021 | Dr. Stanford Grist                  | Anne Cole. LG. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/15/2021 | Dr. Stanford Grist                  | Asked Tamara. LW. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/15/2021 | Dr. Stanford Grist                  | Bonnie P. NO LG. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/15/2021 | Dr. Stanford Grist                  | Brooke A. NO. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/15/2021 | Dr. Stanford Grist                  | Cindy G. NO. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/15/2021 | Dr. Stanford Grist                  | Dr. Grist was rapid tested at AFC Urgent Care today and he tested positive. CS  |
| 01/15/2021 | Dr. Stanford Grist                  | Emily K. NO. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/15/2021 | Dr. Stanford Grist                  | Jeannie called and reported to Lindsay that Dr. Grist was extremely tired and stated he did not feel well. I just called Jeannie just to get some more details and to make sure this is not an emergency. She was not able to find a thermometer but said he feels, " a little warm." He is up and eating his breakfast now. He complained of a headache and pain in his sinus area. I advised her to monitor him closely and if he has any change in consciousness or abnormal behavior call EMS. She said she would. Tracy Parsons notified.  |
| 01/15/2021 | Dr. Stanford Grist                  | Joanna W. No -HP. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/15/2021 | Dr. Stanford Grist                  | Kathy Perez No -HP. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/15/2021 | Dr. Stanford Grist                  | Katrina H. NO. (Added to shift that Occurs once on 01/15/2021 from 02:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/15/2021 | Dr. Stanford Grist                  | No overnight needed. LG (Added to shift that Occurs once on 01/15/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/15/2021 | Dr. Stanford Grist                  | Terri B No -HP. (Added to shift that Occurs once on 01/15/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/15/2021 | Dr. Stanford Grist, Andrew Edwards  | stacy wanted to extend shift to 10:00. I called Andrew and he confirmed he can stay until 10:00. CP. (Added to shift that Occurs once on 01/15/2021 from 02:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; assigned to caregiver Andrew Edwards)   |

| Date       | Related To                         | Description  |
|------------|------------------------------------|--|
| 01/15/2021 | Dr. Stanford Grist, Jeannie Truman | Jeannie is with Dr. Grist this morning she stated that he is not feeling well. He was very confused this morning as she was prepping his coffee and oatmeal he sat on the couch and asked for Tylenol and he said he has a headache. She said he also has a slight cough. He fell asleep on the couch before eating and is still there waking up but the dozing off. He is very tired and not sure if he just didn't sleep well or if he is sick. She said she is going to look for a thermometer and check his temperature.<br><br>Just wanted you all to be aware, she is going to keep me posted.. (Added to shift that Occurs once on 01/15/2021 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jeannie Truman) |
| 01/18/2021 | Harold Hughes, Dr. Stanford Grist  | Have tried to called Harold many times his phone is off. LG (Added to shift that Occurs once on 01/18/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/18/2021 | Harold Hughes, Dr. Stanford Grist  | I cannot reach Harold -BMM. (Added to shift that Occurs once on 01/18/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/18/2021 | Harold Hughes, Dr. Stanford Grist  | I spoke to Harold Hughes and made him aware about Dr. Grist and to make sure he was for sure getting tested. He said he is getting tested tomorrow. I asked how he is feeling today, and he said he feels like he has a slight case of the flu. He knows to call the office as soon as his test results come back. If Lindsay/Brooke don't hear from him over the weekend, then I will call him on Monday. -HP. (Added to shift that Occurs once on 01/18/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/18/2021 | Harold Hughes, Dr. Stanford Grist  | Per Angela, Harold has COVID -HP (Added to care log on 01/18/2021 from 02:30 PM EST to 07:00 PM EST for Grist, Dr. Stanford, assigned to caregiver Hughes, Harold)   |
| 01/18/2021 | Harold Hughes, Dr. Stanford Grist  | Unable to reach Harold -BMM. (Added to shift that Occurs once on 01/18/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 01/18/2021 | Mary Roldan, Dr. Stanford Grist    | Mary is aware Dr. Grist has COVID. LG. (Added to shift that Occurs once on 01/18/2021 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 01/19/2021 | Dr. Stanford Grist                 | Tracy is aware no care for the morning shift. LG (Added to shift that Occurs once on 01/19/2021 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/19/2021 | Dr. Stanford Grist, Katrina Hill   | Katrina going to be tested -BMM. (Added to shift that Occurs once on 01/19/2021 from 08:00 AM EST to 03:30 PM EST for Dr. Stanford Grist; assigned to caregiver Katrina Hill)  |
| 01/19/2021 | Dr. Stanford Grist, Katrina Hill   | Katrina needs off due to her result not being back -BMM (Added to shift that Occurs once on 01/19/2021 from 08:00 AM EST to 03:30 PM EST for Dr. Stanford Grist; assigned to caregiver Katrina Hill)   |
| 01/20/2021 | Dr. Stanford Grist                 | No overnights due to him being sick. LG (Added to shift that Occurs once on 01/20/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/21/2021 | Dr. Stanford Grist                 | Go set up Dr. Grist's medications. I will have the caregiver leave it on the porch steps since he is Covid positive and I will set in up in my car.  |
| 01/21/2021 | Dr. Stanford Grist                 | No overnights due to him being sick. LG (Added to shift that Occurs once on 01/21/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/21/2021 | Dr. Stanford Grist                 | Stacy said to cancel this shift. LG (Added to shift that Occurs once on 01/21/2021 from 08:00 AM EST to 01:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/21/2021 | Dr. Stanford Grist, Jade Caldwell  | Hey Jade!<br><br>I am the nurse with Comfort Keepers and I am planning on coming out today sometime after you get there to set up Dr. Grist's medication boxes. I know that he is Covid + and I have not yet had Covid so I wanted to see if you could put the items on the stoop by the front door. I will need the container of vitamins that is in the cabinet in the kitchen, the black lock box and key (his prescriptions are in it), and all of his medication boxes. Let me know if you have any questions! Thank you for your help!   |
| 01/21/2021 | Harold Hughes, Dr. Stanford Grist  | Per Angela, Harold has COVID -HP (Added to shift that Occurs once on 01/21/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 01/22/2021 | Dr. Stanford Grist                 | Mary Roldan reported there being hardly any food at Dr. Grist's home and expressed that wearing Depends will be necessary for the time being, but there are none in the home. I emailed Tracy Parsons: "Tracy,<br><br>"The caregiver at Dr. Grist's has expressed that she is concerned that there is minimal food at Dr. Grist's to prepare his meals. There are plenty of drinks, but not much food at all. She also feels that wearing Depends may be necessary for him for the time being and there aren't any in the home. I just wanted to pass this information along. You and Lindsay may have already discussed some of this earlier today, but I was out making visits so I'm playing catch up!<br><br>Thank you,<br><br>Christie Snyder"  |
| 01/22/2021 | Dr. Stanford Grist                 | Matt will be there per Tracy. LG (Added to shift that Occurs once on 01/22/2021 from 12:00 PM EST to 05:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/22/2021 | Dr. Stanford Grist                 | Tracy and Stacy are aware there is a gap from noon-3pm. LG. (Added to shift that Occurs once on 01/22/2021 from 12:00 PM EST to 03:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/22/2021 | Dr. Stanford Grist, Jade Caldwell  | Hey!<br>Thanks for all your help yesterday with the medications. I heard that Dr. Grist had some bowel incontinence today. I really feel this is a Covid symptom. He has never had that issue before. Did it just happen the one time? Do you think we need to bring some adult briefs over there for the mean time? Thanks!   |
| 01/23/2021 | Dr. Stanford Grist                 | Anwen Hargreaves - NO. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/23/2021 | Dr. Stanford Grist                 | Donna Youngblood- NO. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | Emily Scutt- OOT. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | I updated BC at 2:49pm to let him know that Dr. Grist probably will not have coverage tonight. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/23/2021 | Dr. Stanford Grist                 | Maria V. - NO. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/23/2021 | Dr. Stanford Grist                 | Mary said that when this shift was discussed that she could not commit. She states that she cannot work this. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | Reached out to Dawn Guy- awaiting response. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | Reached out to Donna Youngblood- awaiting response. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | Reached out to Kim Anderson- awaiting response. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | Reached out to Kim Anderson- awaiting response. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/23/2021 | Dr. Stanford Grist                 | Ruby Brown- OOT. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/23/2021 | Dr. Stanford Grist, Jade Caldwell  | Left VM to confirm weekend MY. (Added to shift that Occurs once on 01/23/2021 from 08:00 AM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jade Caldwell)   |
| 01/23/2021 | Mary Roldan, Dr. Stanford Grist    | Mary said she cannot work this shift due to being up a lot during the night with Dr. Grist and being the first week of the semester and stated "That's why I could not commit when you called." Mary was entered in CC as scheduled for the shift. CS (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 01/23/2021 | Mary Roldan, Dr. Stanford Grist    | Mary stated that when she was called about this shift she never "fully committed" and she is not able to work it after all. CS. (Added to shift that Occurs once on 01/23/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |

| Date       | Related To                        | Description   |
|------------|-----------------------------------|---|
| 01/23/2021 | Robin Allen, Dr. Stanford Grist   | <p>Robin: THANK YOU SO MUCH. YOU ARE AWESOME!!!!!!<br/>Attached is the information for Dr. Grist:<br/>Name: Dr. Stanford Grist</p> <p>Address: 900 Old Hwy 25 Travelers Rest, SC 29690<br/>☒<br/>Level of Care: 2</p> <p>DOB: 4/12/48</p> <p>Pets: NO</p> <p>Life Alert: NO</p> <p>Veteran: NO</p> <p>Contacts: Daughter Stacy (404) 849-1129 Physician: Daniel Wong, FNP At Galen Healthcare</p> <p>ALLERGIES: NKAM Medication Location/instructions: Only takes Cialis and vitamins. He takes all when he wakes up at 5am.</p> <p>Living Will? NO</p> <p>DNR? NO</p> <p>Preferred Hospital: No preference</p> <p>SERVICES REQUIRED:<br/>When you arrive to the shift, the ex-wife will be dropping him off. Clock in and hang tight until he arrives. Also she will come back at 7pm so don't make dinner she makes it.</p> <p>Dr. Stanford Grist is a retired veterinarian that lives in a small cabin on a 400 acre farm. He is still independent with many of his ADLs, but will need a companion to keep him engaged and active. He enjoys being outside and working around his farm.</p> |
| 01/24/2021 | Dr. Stanford Grist                | I have a message out to Jade to see if she can stay any later at all. CS. (Added to shift that Occurs once on 01/24/2021 from 02:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/24/2021 | Dr. Stanford Grist                | Tracy and Stacy are aware we could not cover these shifts. LG. (Added to shift that Occurs once on 01/24/2021 from 02:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/24/2021 | Dr. Stanford Grist                | Tracy and Stacy are aware we could not cover these shifts. LG. (Added to shift that Occurs once on 01/24/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/24/2021 | Dr. Stanford Grist                | Tracy said since we couldn't fill the overnight 1/23 that we really needed to cover 2p-9p on Sunday so Marilyn can fulfill her dinner plans. I told her that we would continue working on this. CS. (Added to shift that Occurs once on 01/24/2021 from 02:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/24/2021 | Dr. Stanford Grist, Jade Caldwell | I let Jade know to contact the on call phone if she could work any later on Sunday with Dr. Grist. Lindsay notifying Tracy/Stacy and made CHRISTIE aware -HP. (Added to shift that Occurs once on 01/24/2021 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jade Caldwell)   |
| 01/24/2021 | Robin Allen, Dr. Stanford Grist   | Robin Allen to cover this shift for a \$5.00 shift premium. CP. (Added to shift that Occurs once on 01/24/2021 from 02:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; assigned to caregiver Robin Allen)   |
| 01/24/2021 | Robin Allen, Dr. Stanford Grist   | Robin Allen to cover this shift for a \$5.00 shift premium. CP. (Added to shift that Occurs once on 01/24/2021 from 02:00 PM EST to 09:00 PM EST for Dr. Stanford Grist; assigned to caregiver Robin Allen)   |
| 01/25/2021 | Dr. Stanford Grist, Jade Caldwell | Hey Jade! I got your message about Dr. Grist. I am so sorry that he is having such a tough time. You are so awesome and we appreciate all that you are doing! I know that he did not have overnight care some this weekend so his family had to care for him. We are working on getting him some pull ups that look like underwear for him. We have more consistent care for him this week so hopefully so many things will not fall thru the cracks. Let me know what you need and I can bring you all what you need. Do you think he would wear some slippers just while he is in the house?  |
| 01/25/2021 | Harold Hughes, Dr. Stanford Grist | LVM for Harold on 1/25 at 4:24pm to check on him .He had been in the hospital -HP. (Added to shift that Occurs once on 01/25/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/25/2021 | Harold Hughes, Dr. Stanford Grist | We need Harold's positive result to determine when he can return. _HP. (Added to shift that Occurs once on 01/25/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 01/25/2021 | Robin Allen, Dr. Stanford Grist   | Good afternoon. We have you definitely scheduled with Dr. Grist Tonight and Wednesday night for this week. We are filling your Monday and Wednesday afternoons for THIS WEEK for Mrs Edwards. Please call with any questions.   |
|            |                                   | You are wonderful!  |
| 01/26/2021 | Dr. Stanford Grist                | <del>Current</del><br>Bonnie R.. (Added to shift that Occurs once on 01/26/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/26/2021 | Dr. Stanford Grist                | Jeannie T.. (Added to shift that Occurs once on 01/26/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/26/2021 | Dr. Stanford Grist                | Katrina- NO<br>Mary- NO<br>Kerri- NO. (Added to shift that Occurs once on 01/26/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |

| Date       | Related To                           | Description  |
|------------|--------------------------------------|--|
| 01/26/2021 | Stacey Grist                         | i put it in the mail today .<br><br>thanks stacey<br><br>On Mon, Jan 25, 2021 at 4:30 PM Sandra Berry <ckupstatesc+b8ef86e1df724d618814aefcb3af6b52+0A@clearcaremail.com> wrote:<br><br>> Greetings from Comfort Keepers - Upstate!<br>><br>> You have a new invoice ready for viewing and payment:<br>> *Invoice Number:* mCmC66602<br>> *Due Date:* 01/25/2021<br>> *Original Amount:* \$3,218.95<br>> *Outstanding Amount:* \$3,218.95<br>> View & Pay Invoice<br>><br>><br>><br>> Thank you!<br>> Sandra Berry<br>I brought out briefs, gloves, chuck pads<br>Jade is good to come in at 7am. LG. (Added to shift that Occurs once on 01/27/2021 from 07:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jade Caldwell)<br>"Tracy,<br><br>Happy Thursday! Dr. Grist's overnight caregivers have expressed that they think having door alarms may be a good idea because while his cognition has declined, they feel like he is still a flight risk if they have to step away to use the restroom, etc. I don't think that having anything expensive, or fancy installed is necessary, but maybe those small door chimes that you can find at Wal Mart, Dollar Tree, etc. I just wanted to pass this suggestion along.<br><br>Thank you,<br><br>Christie Snyder"  |
| 01/27/2021 | Dr. Stanford Grist                   |  |
| 01/27/2021 | Dr. Stanford Grist, Jade Caldwell    |  |
| 01/28/2021 | Dr. Stanford Grist                   |  |
| 01/28/2021 | Dr. Stanford Grist                   | Waiting to hear from Jade, Bonnie Rowe, and Jeannie T. -HP. (Added to shift that Occurs once on 01/28/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/28/2021 | Dr. Stanford Grist, Jade Caldwell    | Jade stayed to show Ann around -HP. (Added to shift that Occurs once on 01/28/2021 from 08:00 AM EST to 02:30 PM EST for Dr. Stanford Grist; assigned to caregiver Jade Caldwell)  |
| 01/28/2021 | Dr. Stanford Grist, Jennifer Seigler | Call and text into Rebecca. LG. (Added to shift that Occurs once on 01/28/2021 from 11:00 PM EST to 06:30 AM EST for Dr. Stanford Grist; assigned to caregiver Jennifer Seigler)   |
| 01/28/2021 | Dr. Stanford Grist, Jennifer Seigler | Jennifer said her and Dr. Grist got along good. He got up once every hour of the overnight shift. -HP. (Added to shift that Occurs once on 01/28/2021 from 11:00 PM EST to 06:30 AM EST for Dr. Stanford Grist; assigned to caregiver Jennifer Seigler)  |
| 01/28/2021 | Dr. Stanford Grist, Jennifer Seigler | Kerri - NO. (Added to shift that Occurs once on 01/28/2021 from 11:00 PM EST to 06:30 AM EST for Dr. Stanford Grist; assigned to caregiver Jennifer Seigler)   |
| 01/28/2021 | Dr. Stanford Grist, Jennifer Seigler | Went over updated overnights details that Rebecca Wyatt gave Brooke and I (unsteady, standby assistance, VERY confused, and pees in random places) -HP. (Added to shift that Occurs once on 01/28/2021 from 11:00 PM EST to 06:30 AM EST for Dr. Stanford Grist; assigned to caregiver Jennifer Seigler)   |
| 01/28/2021 | Dr. Stanford Grist, Katrina Hill     | Katrina's father called because she was in tears over her grandmother's passing -BMM (Added to shift that Occurs once on 01/28/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Katrina Hill)  |
| 01/29/2021 | Mary Roldan, Dr. Stanford Grist      | Mary texted to pick up this shift on 1/23. CS. (Added to shift that Occurs once on 01/29/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 01/30/2021 | Dr. Stanford Grist, Jade Caldwell    | Jade needs this off due to going to a funeral. LG (Added to shift that Occurs once on 01/30/2021 from 08:00 AM EST to 01:00 PM EST for Dr. Stanford Grist; assigned to caregiver Jade Caldwell)  |
| 01/30/2021 | Dr. Stanford Grist, Jennifer Seigler | Jennifer confirmed Saturday shift -HP. (Added to shift that Occurs once on 01/30/2021 from 11:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; assigned to caregiver Jennifer Seigler)  |
| 01/30/2021 | Dr. Stanford Grist, Jennifer Seigler | Jennifer does not want to go because of the weather. MB (Added to shift that Occurs once on 01/30/2021 from 11:00 PM EST to 07:00 AM EST for Dr. Stanford Grist; assigned to caregiver Jennifer Seigler)   |
| 01/31/2021 | Dr. Stanford Grist                   | Bonnie- NO. (Added to shift that Occurs once on 01/31/2021 from 05:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/31/2021 | Dr. Stanford Grist                   | Bonnie R- waiting on. LG. (Added to shift that Occurs once on 01/31/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 01/31/2021 | Dr. Stanford Grist                   | Jeannie T- NO. (Added to shift that Occurs once on 01/31/2021 from 04:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/31/2021 | Dr. Stanford Grist                   | MARY R. NO. (Added to shift that Occurs once on 01/31/2021 from 05:00 PM EST to 10:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 02/01/2021 | Ann Crippen, Dr. Stanford Grist      | Hey Ann,<br><br>I got Dr. Grist a new electric razor and some hand held urinals. I can bring those by today. Is there anything else you all need out there? Thanks!<br>Get receipts for boots, alarm, shaver and urinals.<br>Take out new razor and hand held urinals.<br>Harold is still out with Covid. -HP. (Added to shift that Occurs once on 02/01/2021 from 02:30 PM EST to 07:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)<br>Harold Hughes just got done with his follow up appointment. He is doing better but his doctor recommends that not work any shifts for the next 2 weeks unless he's feeling wonderful. I have taken him off this week and next week. He knows we will follow up with him during this time. -HP. (Added to shift that Occurs once on 02/04/2021 from 02:30 PM EST to 07:30 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)<br>Harold is aware that Dr. Grist is now 24/7 and that we have 12 hour shift regulars with him ongoing. We will only call him for fill in shifts as of now, Sent update to office -HP. (Added to shift that Occurs once on 02/04/2021 from 02:30 PM EST to 07:30 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)<br>I have a message out to Wanda to see if she can do 8pm-8am going forward. LG. (Added to shift that Repeats weekly on Thursday starting on Feb 05, 2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)<br>Wanda is good to work 8pm-8am. LG. (Added to shift that Repeats weekly on Thursday starting on Feb 05, 2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)<br>Mary requested this Friday off. LG (Added to shift that Occurs once on 02/05/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)<br>Shifts confirmed -MM. (Added to shift that Occurs once on 02/05/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace) |
| 02/01/2021 | Dr. Stanford Grist                   |  |
| 02/01/2021 | Dr. Stanford Grist                   |  |
| 02/01/2021 | Harold Hughes, Dr. Stanford Grist    |  |
| 02/04/2021 | Harold Hughes, Dr. Stanford Grist    |  |
| 02/04/2021 | Harold Hughes, Dr. Stanford Grist    |  |
| 02/04/2021 | Wanda Pace, Dr. Stanford Grist       |  |
| 02/04/2021 | Wanda Pace, Dr. Stanford Grist       |  |
| 02/05/2021 | Mary Roldan, Dr. Stanford Grist      |  |
| 02/05/2021 | Wanda Pace, Dr. Stanford Grist       |  |

| Date       | Related To  | Description   |
|------------|---|---|
| 02/07/2021 | Dr. Stanford Grist  | Bonnie R. NO. (Added to shift that Occurs once on 02/07/2021 from 02:00 PM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/07/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist              | LVM, sent confirmation text -MM. (Added to shift that Occurs once on 02/07/2021 from 08:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))   |
| 02/08/2021 | Robin Allen, Dr. Stanford Grist                           | Good evening.<br>This is just a quick reminder of your shift tonight with:<br>Dr. Stanford Grist from 8p-8a.<br>Please confirm this text.<br><br>Many thanks for all that you do.   |
| 02/10/2021 | Ann Crippen, Dr. Stanford Grist                           | <del>Candy</del><br>Hey Ann! I am planning on coming to refill Dr. Grist's medications. Can you look and see if he has some days left in his med box?   |
| 02/10/2021 | Ann Crippen, Dr. Stanford Grist                           | Lindsey<br><br>Good morning. Dr Grist has an appt at Galen Healthcare Wednesday, February 10 @ 10:00 for labs. Can you please add this to the calendar? The address is 501 Me oriel Drive ext Greer sc 29651.   |
| 02/10/2021 | Dr. Stanford Grist  | Thanks<br><del>Tracy (Added to shift that Repeat weekly on Wednesday starting on Feb 10, 2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)</del><br>Follow up with Ann about the medications.   |
| 02/10/2021 | Dr. Stanford Grist  | I called Galen medical to reorder Terbinafide. Did the pharmacy get it?<br>I picked it up from pharmacy.  |
| 02/10/2021 | Dr. Stanford Grist  | When I arrived to set up Dr. Grist's home, there was a gun on the bookshelf. I notified Tracy Parsons and she called Stacey. I removed the gun from his home and brought it to Stacey at her work.  |
| 02/11/2021 | Ann Crippen, Dr. Stanford Grist                           | Hey Ann! Dr. Grist has a doctor's appointment on 2/17/21 at 12 noon at Galen Healthcare. 501 C Memorial Drive Extension Greer, SC 29651. The phone number is 864-383-7865. I got him a wall calender and will bring it by next week.  |
| 02/11/2021 | Dr. Stanford Grist  | Tracy is aware that my last day will be Wed 2/17 and that Cassandra will take over as primary CCC for Dr. Grist. We were talking on the phone this morning about payment for Dr. Grist's lab appointment and it seemed like a good opportunity to tell her. I let her know how much I have enjoyed working with and getting to know her. and she knows that she is in great hands with Cassandra.   |
| 02/11/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist              | Hey Kerri! Daughter Stacey is going to call in and pay the bill for today   |
| 02/11/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist              | Hey Kerri!<br><br>I just wanted to let you know that Dr. Grist does not need to fast before his lab appointment this morning at 10. Will you try to push fluids with him so it is easier for them to draw labs? Let me know if you need anything! I hope you have a good day!<br><br>Thanks!<br><del>Cassandra</del><br>Hey ! heard that Dr. Grist needs more food. Do you know if there is a grocery list? I am going to send this to Tracy and Stacey. I am also going to let them know about the leak and that he needs more pull ups.<br>LVM for Jennifer S for a switch -HP. (Added to shift that Occurs once on 02/12/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)<br>Maria V NO. (Added to shift that Occurs once on 02/12/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)<br>Maria V. NO. (Added to shift that Occurs once on 02/12/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)<br>Wanda NO per Brooke -HP. (Added to shift that Occurs once on 02/12/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)<br>Mary texted the phone and said she has a family emergency to attend -Kayla (Added to shift that Occurs once on 02/12/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)<br>Mary texted the phone and said she has a family emergency to attend -Kayla. (Added to shift that Occurs once on 02/12/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Mary Roldan)<br>Kerri- NO. (Added to shift that Occurs once on 02/14/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)<br>Check on her- HP. (Added to shift that Occurs once on 02/15/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Robin Allen)<br>Robin Allen, Dr. Stanford Grist<br>Robin is good to work. LG. (Added to shift that Occurs once on 02/15/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Robin Allen)<br>Ann Crippen, Dr. Stanford Grist<br>Hey Ann! Lindsay said that Dr. Grist's ex wife Marilyn is going to bring his groceries today. Will you let me know tomorrow if he has everything that he needs? Thanks!<br>Dr. Stanford Grist<br>Kerri requested off. LG. (Added to shift that Occurs once on 02/16/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)<br>Dr. Stanford Grist<br>Remind Ann about Dr. Grist's appt tomorrow at 12.<br>Lindsav confirmed with her.<br>Good afternoon.<br>This is your Tuesday Evening Shift Reminder with:<br>Dr. Stanford Grist from 8p-8a.<br>Please confirm this text.<br><br>As Always, thank you for everything you do for our sweet clients. |
| 02/17/2021 | Dr. Stanford Grist  | <del>Candy</del><br>Follow up with Ann to make sure he has enough food!<br>Ann said that he has plenty of food now. Marilyn came and delivered it. She also took photos to document so our caregivers " do not take it" I notified Tracy P. I reached out to all of the caregivers to notify them to call the office if there are any issues, not the family.   |
| 02/17/2021 | Harold Hughes, Robin Allen, Kerri Burnett (McCreary), Ann | Hey caregivers! If there are any issues or if Dr. Grist needs anything, please contact the office and not his family. 864-268-8993. We are happy to handle that and there is always someone on call after hours. Please reach out to us if you need anything. Thank you for all that you do. We appreciate you all SO much!   |
| 02/18/2021 | Dr. Stanford Grist  | Cassandra Jackson<br>Email Stacey about OTC medication and to get new mop and vaccume.  |

| Date       | Related To                                   | Description  |
|------------|--|--|
| 02/18/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Check on her. Cyndy said she texted the phone that she was stuck in the mountains and trying to get home -BMM. (Added to shift that Occurs once on 02/18/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))  |
| 02/18/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Cyndy said she texted the phone that she was stuck in the mountains and trying to get home -BMM<br>- I told Kerri i got tomorrow covered just to make it home safely. LG (Added to shift that Occurs once on 02/18/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))  |
| 02/21/2021 | Dr. Stanford Grist                           | Harold- NO. (Added to shift that Repeats weekly on Sunday starting on Feb 21, 2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 02/23/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | I took some more wash clothes and a calender to Dr. Grist's. He was doing well. Kerri was in uniform and was polite and professional.  |
| 02/23/2021 | Wanda Pace, Dr. Stanford Grist               | Good afternoon.<br>This is a quick reminder for your evening shift with:<br>Drr. Stanford Grist from 8p-8a.<br><br>Please confirm this text.<br>As always, thank you for everything you do for our clients.<br>We appreciate your compassion and hard work.  |
| 03/03/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Good morning!<br>Kerri called Syncretist for 8:45am clock in -HP. (Added to shift that Occurs once on 03/03/2021 from 09:30 AM EST to 02:00 PM EST for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))   |
| 03/03/2021 | Robin Allen, Dr. Stanford Grist              | This is just a quick reminder of your Wednesday Evening Shift with:<br>Dr Stanford Grist from 8p-8a.<br><br>Please confirm this shift.<br><br>As always, thank you so much for everything you do for our client.   |
| 03/05/2021 | Ann Crippen, Dr. Stanford Grist              | Check on her -BMM. (Added to shift that Occurs once on 03/05/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 03/07/2021 | Ann Crippen, Dr. Stanford Grist              | Stacy is coming by to take Dr. Grist for the day and will bring him home around 7pm. Tracy is aware. No caregiver is needed from noon-7pm. LG. (Added to shift that Occurs once on 03/07/2021 from 08:00 AM EST to 12:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 03/07/2021 | Dr. Stanford Grist                           | Stacy is coming by to take Dr. Grist for the day and will bring him home around 7pm. Tracy is aware. No caregiver is needed from noon-7pm. LG (Added to shift that Occurs once on 03/07/2021 from 12:00 PM EST to 07:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 03/07/2021 | Wanda Pace, Dr. Stanford Grist               | Stacy is coming by to take Dr. Grist for the day and will bring him home around 7pm. Tracy is aware. No caregiver is needed from noon-7pm. LG. (Added to shift that Occurs once on 03/07/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 03/07/2021 | Wanda Pace, Dr. Stanford Grist               | Wanda is aware to arrive at 7pm. LG. (Added to shift that Occurs once on 03/07/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 03/08/2021 | Robin Allen, Dr. Stanford Grist              | Good morning.<br>This is just a quick reminder of your shift this evening with:<br>Dr. Stanford Grist 8p-8a<br><br>Please confirm this shift.<br>As Always, thank you for everything that you do for our clients.<br>I appreciate you.<br>Have a great day.  |
| 03/09/2021 | Wanda Pace, Dr. Stanford Grist               | Good afternoon.<br><br>This is just a quick reminder of your Tuesday evening shift with:<br>Dr. Stanford Grist from 8p-8a.<br><br>Please confirm this shift.<br><br>As always, I appreciate everything you do for our clients.   |
| 03/11/2021 | Wanda Pace, Dr. Stanford Grist               | Good afternoon.<br>This is a quick reminder for your shift this evening with:<br>Dr. Stanford Grist from 8p-8a.<br><br>Please confirm this shift.<br>As always, thank you for everything that you do for our clients.  |
| 03/13/2021 | Dr. Stanford Grist                           | Mary R. NO. (Added to shift that Repeats every 2 weeks on Saturday starting on Mar 13, 2021 from 02:00 PM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 03/13/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Kerri has poison ivy and need to go back to the Dr.. LG (Added to shift that Occurs once on 03/13/2021 from 02:00 PM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))   |
| 03/14/2021 | Wanda Pace, Dr. Stanford Grist               | Stacy sent a group text to let us know that Dr. Michie would be picking Dr. Grist up at 4pm and dropping him back off at 6pm. Stacy and Wanda spoke yesterday and Wanda told Stacy that she could just come in at 6. I text Wanda to confirm -KH. (Added to shift that Occurs once on 03/14/2021 from 06:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace) |
| 03/15/2021 | Dr. Stanford Grist                           | Send the caregivers a reminder about HIPPA per TP  |
| 03/15/2021 | Robin Allen, Dr. Stanford Grist              | Check on her -BMM. (Added to shift that Occurs once on 03/15/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)   |

| Date       | Related To   | Description  |
|------------|--|--|
| 03/17/2021 | Robin Allen, Kerri Burnett (McCreary), Ann Crippen, Wanda Pace, Dr. Stanford Grist | Hey caregivers, I want to thank you all for all that you do to take care of Dr. Grist! He is doing so much better because of you all! I also wanted to let you know that you can reach out to us at any time if there are any issues. Please keep all information about Dr. Grist confidential per the HIPPA policies for his privacy. Let me know if you need anything or have any questions. |
| 03/21/2021 | Dr. Stanford Grist   | Thank you!<br>Cassandra<br>Marilyn will have him during this time. LG (Added to shift that Occurs once on 03/21/2021 from 05:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 03/23/2021 | Wanda Pace, Dr. Stanford Grist   | This is a reminder of your Tuesday evening shift with :<br>Dr. Stanford Grist from 8p-8a.<br>Please confirm this shift.<br>Thank you for everything that you do.   |
| 03/24/2021 | Ann Crippen, Dr. Stanford Grist  | Cynthia<br>Hey Ann! I am coming to Dr. Grist's house this afternoon. I am going to pick up his prescription at Costco before I come. Do you all need anything?   |
| 03/24/2021 | Dr. Stanford Grist   | Go pick up Dr. Grist's medication at Costco.   |
| 03/24/2021 | Robin Allen, Dr. Stanford Grist  | Good afternoon:<br>This is a reminder of your Wednesday Evening shift with:<br>Dr. Stanford Grist from 8p-8a.<br>Please confirm this shift.  |
|            |  | Thank you for all that you do for our clients.<br>I appreciate all of your hard work.  |
| 03/26/2021 | Ann Crippen, Dr. Stanford Grist  | Cynthia<br>Sunday 8-4.<br><br>Please confirm this shift.   |
| 03/26/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                                       | Have a great weekend!<br>Friday 3/26, 8p-8a.<br>Please confirm this shift.   |
| 03/26/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                                       | Have a great weekend!<br>Kerri picked up this shift for Wanda. Kerri said that she found out that she can make a little extra money that she thought -HP. (Added to shift that Occurs once on 03/26/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))   |
| 03/26/2021 | Wanda Pace, Dr. Stanford Grist   | Wanda needs to be off for a family matter -HP (Added to shift that Occurs once on 03/26/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 03/27/2021 | Dr. Stanford Grist, Jeannie Truman   | Jeannie is aware not to go. LG (Added to shift that Occurs once on 03/27/2021 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 03/27/2021 | Dr. Stanford Grist, Jeannie Truman   | Jeannie is aware not to go. LG. (Added to shift that Occurs once on 03/27/2021 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 03/27/2021 | Dr. Stanford Grist, Jeannie Truman   | Tracy stated that Marilyn will be there from 8am-8pm and no care is needed this Saturday. LG (Added to shift that Occurs once on 03/27/2021 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 03/27/2021 | Dr. Stanford Grist, Jeannie Truman   | Tracy stated that Marilyn will be there from 8am-8pm and no care is needed this Saturday. LG. (Added to shift that Occurs once on 03/27/2021 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 03/27/2021 | Mary Roldan, Dr. Stanford Grist  | Mary knows not to go. LG (Added to shift that Occurs once on 03/27/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 03/27/2021 | Mary Roldan, Dr. Stanford Grist  | Tracy stated that Marilyn will be there from 8am-8pm and no care is needed this Saturday. LG. (Added to shift that Occurs once on 03/27/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Mary Roldan)  |
| 03/29/2021 | Dr. Stanford Grist   | Make sure they wear sunscreen, he wants to walk, Ted hose  |
| 03/30/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                                       | Kerri requested off. LG. (Added to shift that Repeats weekly on Tuesday starting on Mar 09, 2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))   |
| 03/30/2021 | Wanda Pace, Dr. Stanford Grist   | Dr. Stanford Grist 8p-8A<br><br>Please confirm this shift.<br>Many many thanks for all that you do.  |
| 03/31/2021 | Dr. Stanford Grist   | Cynthia<br>Have a call and text out to Wanda. LG. (Added to shift that Occurs once on 03/31/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 03/31/2021 | Robin Allen, Dr. Stanford Grist  | Robin needs off -BMM. (Added to shift that Repeats weekly on Wednesday starting on Mar 25, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)   |
| 04/01/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                                       | Kerri needs off-BMM. (Added to shift that Repeats weekly on Thursday starting on Mar 18, 2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))  |
| 04/03/2021 | Wanda Pace, Dr. Stanford Grist   | Wanda is good to work Easter. LG. (Added to shift that Occurs once on 04/03/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/04/2021 | Dr. Stanford Grist   | Marilyn coming to get Dr. Grist. LG (Added to shift that Occurs once on 04/04/2021 from 11:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/04/2021 | Wanda Pace, Dr. Stanford Grist   | Wanda is good to work Easter. LG. (Added to shift that Occurs once on 04/04/2021 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/05/2021 | Robin Allen, Dr. Stanford Grist  | Robin needs off -BMM. (Added to shift that Repeats weekly on Monday starting on Apr 06, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)  |
| 04/07/2021 | Robin Allen, Dr. Stanford Grist  | Check on Robin. She felt bad on Monday -BMM. (Added to shift that Occurs once on 04/07/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)   |
| 04/07/2021 | Robin Allen, Dr. Stanford Grist  | She called and wanted to give an update. She was seen by the Dr yesterday. They tested her for covid, and it was negative. She has bad sinus infection with a bad cough, fever and chills... (Added to shift that Occurs once on 04/07/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)   |
| 04/09/2021 | Ann Crippen, Dr. Stanford Grist  | Please confirm the following shifts for this weekend:<br><br>Thank you for all that you do.<br>Sun. 4/11: Dr. Stanford Grist<br>Take letter to him from daughter. Tracy P is going to drop it off in Greenville. Take birthday present.  |
| 04/09/2021 | Dr. Stanford Grist   |  |

| Date       | Related To                                   | Description  |
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| 04/09/2021 | Wanda Pace, Dr. Stanford Grist               | Please confirm the following shifts for this weekend:<br><br>Thank you for all that you do.<br>Friday 4/9: 8p-8a<br>Saturday 4/10: 8p-8a<br>Sunday 4/11: 8p-8a<br>Kerri B- NO. (Added to shift that Occurs once on 04/10/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 04/10/2021 | Dr. Stanford Grist                           | Mary can not work this Saturday, She has a CPR class on this day. LG (Added to shift that Occurs once on 04/10/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Mary Roldan)   |
| 04/10/2021 | Mary Roldan, Dr. Stanford Grist              | caregiver cannot go to shift as a tree has fallen on her driveway (Added to shift that Occurs once on 04/10/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/10/2021 | Wanda Pace, Dr. Stanford Grist               | Stacy will be with him during this time. LG (Added to shift that Occurs once on 04/11/2021 from 05:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/11/2021 | Dr. Stanford Grist                           | Mail birthday card   |
| 04/12/2021 | Dr. Stanford Grist                           | Good morning and Happy Friday.   |
| 04/16/2021 | Wanda Pace, Dr. Stanford Grist               | This is your weekend shift reminder with:<br>Dr. Stanford Grist:<br>Friday 8p-8a<br>Saturday 4p-8a<br>Sunday 4p-8a   |
|            |  | Please confirm this text.<br>Have a great weekend and thank you for all that you do.   |
| 04/17/2021 | Dr. Stanford Grist                           | Kerri B- NO. (Added to shift that Occurs once on 04/17/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 04/17/2021 | Wanda Pace, Dr. Stanford Grist               | Wanda is good to come in at 4pm. LG (Added to shift that Occurs once on 04/17/2021 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/21/2021 | Robin Allen, Dr. Stanford Grist              | Dr. Grist was so upset when Robin came in and yelling she was stealing things and he did not want her there. Ann clamed him down and he said Robin could stay but after that he does not want her back. LG. (Added to shift that Repeats weekly on Wednesday starting on Apr 22, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)           |
| 04/22/2021 | Dr. Stanford Grist                           | I have a message out to Wanda and Jason about this shift. LG. (Added to shift that Occurs once on 04/22/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/22/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Kerri is not feeling well and can not work today. LG (Added to shift that Occurs once on 04/22/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Kerri Burnett (McCreary))  |
| 04/24/2021 | Wanda Pace, Dr. Stanford Grist               | Left VM about weekend shifts - JA. (Added to shift that Repeats weekly on Saturday starting on Apr 25, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 04/28/2021 | Robin Allen, Dr. Stanford Grist              | I have called, texted for Robin not to go. LG (Added to shift that Occurs once on 04/28/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Robin Allen)  |
| 04/30/2021 | Wanda Pace, Dr. Stanford Grist               | Wanda picked up for a \$25.00 walmart card. LG. (Added to shift that Occurs once on 04/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 05/01/2021 | Dr. Stanford Grist                           | Harold H- NO. (Added to shift that Occurs once on 05/01/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 05/01/2021 | Dr. Stanford Grist                           | Isaiah - Asked<br>Austin - Asked<br>Brett- asked. (Added to shift that Occurs once on 05/01/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 05/01/2021 | Dr. Stanford Grist                           | Jeannie T- NO. (Added to shift that Occurs once on 05/01/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 05/01/2021 | Dr. Stanford Grist                           | Kerr B- NO. (Added to shift that Occurs once on 05/01/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 05/06/2021 | Ann Crippen, Dr. Stanford Grist              | Hey Ann,<br>Can you give me a call at the office when you have a minute. No hurry. 864-268-8993<br>Thanks! Cassandra   |
| 05/07/2021 | Ann Crippen, Dr. Stanford Grist              | Hey! Wanda said Dr. Grist is complaining of pain to his right big toe with her. If he will let you, can you see if he will let you take a picture of his toe and send it to me?  |
| 05/07/2021 | Dr. Stanford Grist                           | If anyone calls needing Dr. Grist's invoices or any info on his finances we MUST have the request directly from his daughter Stacy, she is the POA over his finances.  |
| 05/07/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Hey Kerri! Tracy Parsons wanted to meet with Dr. Grist's caregivers to discuss any issues we are having and the family dynamics. We can do a phone call if that would be easier. Would you be available next week to do this?<br>Thanks!   |
| 05/09/2021 | Dr. Stanford Grist                           | Stacy will have Dr. Grist during this time. LG (Added to shift that Occurs once on 05/09/2021 from 06:30 PM EDT to 09:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 05/10/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist | Hey! I just wanted to let you know that I am going to call Tracy and then we will 3 way call you at 2pm.   |
| 05/12/2021 | Dr. Stanford Grist                           | Pick up medications from pharmacy  |
| 05/13/2021 | Dr. Stanford Grist                           | Marilyn would like to take Stan to dinner Thursday night from 7-10. Please check the schedule and let me know how this fits into the girls.<br>We can discuss Wednesday<br>Thanks  |
| 05/13/2021 | Wanda Pace, Dr. Stanford Grist               | Tracy (Added to shift that Occurs once on 05/13/2021 from 07:00 PM EDT to 10:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)<br>Marilyn would like to take Stan to dinner Thursday night from 7-10. Please check the schedule and let me know how this fits into the girls.<br>We can discuss Wednesday<br>Thanks   |
| 05/14/2021 | Cassandra Jackson, Dr. Stanford Grist        | Tracy (Added to shift that Occurs once on 05/14/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)<br>Filled medications for 1 week due to med availability. Changed dressing on right toe.. (Added to shift that Occurs once on 05/14/2021 from 08:30 AM EDT to 09:30 AM EDT for Dr. Stanford Grist; assigned to caregiver Cassandra Jackson) |

| Date       | Related To  | Description  |
|------------|---|--|
| 05/14/2021 | Dr. Stanford Grist  | Marilyn, the ex wife keeps putting up the signs to call her for anything. I have instructed the caregivers to NOT call her for anything per Tracy. Tracy said we are going to leave the notes because Marilyn is just going to keep putting them up. Mr. Wong NP removed part of an ingrown toenail. We are now applying Bacitracin and wrapping his right toe every morning and he is taking an antibiotic three times a day for 14 days. They also started him on Lasix 40 mg x 3 days and then 20 mg daily after that. They also restarted his thyroid medication.  |
| 05/14/2021 | Kerri Burnett (McCreary), Ann Crippen, Wanda Pace, Dr. Stanford Grist | Hey caregivers! I wanted to let you all know of some changes that the NP made when Dr. Grist saw him yesterday. They started him on Lasix, so he most likely will be urinating a lot more. They removed part of the toenail on his right big toe. When he gets up in the morning after his shower, he needs to have Bacitracin applied to that whole toenail and wrap it in gauze. The supplies are all in a bag on the kitchen table. We also got him some over the counter athletes foot spray. Please spray this between his toes after his shower once his feet are dry. They also started him on an antibiotic three times a day for 14 days. I have added the first one to his med box. Also, *** VERY IMPORTANT*** Marilyn has posted signs saying to call her immediately for any needs. We are going to leave the signs up but please DON'T call her. Call the office if you need anything and we can notify Stacy. Let me know if you all have any questions! I appreciate you all so much!  |
| 05/17/2021 | Dr. Stanford Grist  | Marilyn is going to take him to dinner during this time. LG (Added to shift that Occurs once on 05/17/2021 from 07:00 PM EDT to 10:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 05/17/2021 | Wanda Pace, Dr. Stanford Grist  | Wanda called this morning or stated that all caregivers are worried about the bathroom doors being locked and Dr. Grist locking them since he is becoming more confused. I will let Tracy and Stacy be aware. LG. (Added to shift that Repeats weekly on Sunday starting on May 16, 2021 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 05/18/2021 | Dr. Stanford Grist  | Go pick up thyroid medication from pharmacy.   |
| 05/19/2021 | Dr. Stanford Grist  | Marilyn is going to take him to dinner during this time. LG (Added to shift that Occurs once on 05/19/2021 from 07:00 PM EDT to 10:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 05/20/2021 | Ann Crippen, Dr. Stanford Grist                                       | Hey! I am going to come by there today this afternoon. Do you all have anything going on this afternoon?   |
| 05/24/2021 | Dr. Stanford Grist  | Marilyn taking client out--MG (Added to shift that Occurs once on 05/24/2021 from 07:00 PM EDT to 10:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 05/25/2021 | Dr. Stanford Grist  | Kerri called and said that Dr. Grist was more confused yesterday and was saying inappropriate things to her. He stated he thought she was his girlfriend. She corrected him but said that it did make her uncomfortable. She said that she was okay to go back and she will let us know if it happens again. I let Tracy P know.   |
| 05/25/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                          | Tracy called me back with Stacy and Stacy said that Dr. Grist told her that he was in a sexual relationship with the caregiver Kerri. I explained to them that Kerri called us yesterday and told us that he was making inappropriate remarks and she reported it to us. Stacy said she feels like he is telling the truth even though he has dementia and is confused. I told her that Kerri will be removed and we will investigate but my opinion is that he is confused. She did not agree. Ann texted me on the phone and said that Albert came over and told Dr. Grist that there was a recording device in the cabinet that has been recording all of the caregivers. He took that with him. I told Ann to just act like she is always being recorded. Tracy is aware of all of this.   |
| 05/26/2021 | Dr. Stanford Grist  | Follow up with Grist's medications.  |
| 05/26/2021 | Dr. Stanford Grist  | I got the Aricept but the Namenda is still processing thru insurance. Will pick up and add to med box when ready.  |
| 05/26/2021 | Dr. Stanford Grist  | Marilyn taking client out--MG<br>(Added to shift that Occurs once on 05/26/2021 from 07:00 PM EDT to 10:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 05/26/2021 | Wanda Pace, Dr. Stanford Grist  | Marilyn had Dr. Grist from 7pm-10:30pm last night. Wanda called this morning to state that Dr. Grist never came home last night. I called Tracy and Tracy said Marilyn called her at 10:20pm but did not leave a V/M with Tracy. Marilyn took Dr. Grist to her home since our caregiver was not there at 10:20pm but I told Tracy and Stacy that our caregiver would be there at 10:30pm. Marilyn did bring Dr. Grist home Thursday morning. LG. (Added to shift that Occurs once on 05/26/2021 from 10:30 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 05/27/2021 | Dr. Stanford Grist  | Tracy P brought over new orders from appt with Daniel Wong NP. Tadalafil d/c. Namenda and Aricept started. I picked up Aricept from the pharmacy but Namenda was still being processed through insurance. Will pick up and add to med box when ready. I will go today to remove Tadalafil from med box and add Aricept as ordered.   |
| 05/27/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                          | Kerri came into the office today to discuss the accusation that was brought to our attention from the family regarding her and Dr. Grist possibly having sexual relations. Brandon, myself, and Lindsay were in the meeting with Kerri. Brandon led the conversation and he started by ensuring Kerri that we were on her side, so it was best for her to tell us exactly what occurred between her and Dr. Grist. Kerri admitted that Dr. Grist has made moves towards her many times and that it's made her very uncomfortable but that she didn't tell the office because she hoped it would end. Kerri stated that Dr. Grist tried to kiss her multiple times but that it was normal for him to kiss the ladies on the forehead or hand. However, she did say that he has kissed her on the mouth multiple times but with no tongue. Kerri also stated that on the overnight shift, she sat in his bed 2-3 times only to get him to go to sleep and then she would leave the room. Even when he would fall asleep, he would wake back up to come and find her. She mentioned that she got on top of him once but that she did not have sex with him. She said she was extremely uncomfortable but thought it would make him go to bed. She said multiple times that she did not tell the office because she was very embarrassed. She mentioned that he has touched her before, but she did not go into any extra details while Brandon was in the room. She did go through the sequence of events of when she took her pants and panties off due to an accident she had. She was embarrassed and didn't know what to do so she went to the bathroom to clean herself up and put her panties in her pocket. Brandon left the room to allow her to speak with Lindsay and I about anything else that she needed to. |
| 05/27/2021 | Lindsay   | Lindsay and I spoke to Kerri a bit longer to ensure her we are here for her. She mentioned while talking to us that she went to her doctor yesterday because she has PTSD from a situation when she was young. Her doctor has set her up with a counselor to help her through this. She stated again how embarrassed she is and wishes she would have told us sooner. At this point she did start crying regarding the situation. She said she couldn't focus last night at school and is ready for this to be behind her. She has thought about coming off the schedule multiples times or quitting but that she doesn't want to stop working. Lindsay told Kerri that going forward, we will only put her on female clients so that something like this will not happen again. She then started talking about him kissing and touching her again and I asked her if she ever touched his penis and she said yes. To end the conversation, I asked her if there was anything else she needed to tell us today and she said no. We reminded her that we are here if she needs to talk at any point or let us know anything else. -HP   |
| 05/27/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                          | Kerry Burnett was terminated on 5/27/2021 for cause. Inappropriate behavior which is documented in a separate notation. BC   |
| 05/28/2021 | Ann Crippen, Dr. Stanford Grist                                       | noone is needed per stacy -Kayla (Added to shift that Occurs once on 05/28/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 05/28/2021 | Dr. Stanford Grist  | Follow up to see if Namenda is ready.  |
| 05/28/2021 | Dr. Stanford Grist  | 6-1-21 Insurance did not cover it. Tracy said they are just going to do the Aricept for now. I spoke with Ann and he is tolerating it well.<br>Marilyn will have him. LG (Added to shift that Occurs once on 05/28/2021 from 09:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |

| Date       | Related To                           | Description  |
|------------|--------------------------------------|--|
| 05/28/2021 | Dr. Stanford Grist                   | The following was billed on invoice 5/31/2021:<br>\$6.48 for Arby's on 5/21<br>\$4.73 for Wendy's on 5/24<br>\$9.70 for Bruster's on 5/27<br>All purchased by Ann  |
| 06/01/2021 | Dr. Stanford Grist                   | I spoke with Tracy Parsons and let her know that we have concluded our internal investigation. I reiterated what I told her last week that we did discover some preliminary findings that confirmed she was not well-suited for Dr. Grist and had been pulled from his schedule to never return due to inappropriate behavior and a failure to follow proper protocol around notifying the office of inappropriate situations. I explained that what we uncovered was cause enough to remove Kerri. I asked Tracy if she had any questions or would like us to perform any further actions. Tracy said that at this point "she is going to let a sleeping dog sleep." Unless it is pushed by the family which she thinks it wouldn't be, she is going to move forward. She said it is an employment issue and none of her business what we do with Kerri, her concern is Dr. Grist but if she is not with him "she doesn't care". She said we will never know exactly what happened. She is glad we have finished our investigation and she doesn't have an opinion if she's no longer with him. |
| 06/03/2021 | Dr. Stanford Grist                   | Marilyn would like to take Dr Grist to dinner Thursday, tomorrow, please schedule. (7-10)<br><br>Thanks  |
| 06/04/2021 | Wanda Pace, Dr. Stanford Grist       | Tracy (Added to shift that Occurs once on 06/03/2021 from 07:00 PM EDT to 10:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/08/2021 | Ann Crippen, Dr. Stanford Grist      | LVM to check in and confirm weekend -MM. (Added to shift that Repeats weekly on Friday starting on Jun 05, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 06/09/2021 | Dr. Stanford Grist                   | Hey! Will y'all be there this afternoon? I am going to come by to adjust the medication.   |
| 06/16/2021 | Dr. Stanford Grist                   | Marilyn will have him during this time. LG (Added to shift that Occurs once on 06/09/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/16/2021 | Dr. Stanford Grist                   | Jeannie T- NO. (Added to shift that Repeats weekly on Wednesday starting on Jun 17, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/16/2021 | Dr. Stanford Grist                   | Per Tracy, Marilyn will have him during this time. LG (Added to shift that Occurs once on 06/16/2021 from 12:45 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/16/2021 | Dr. Stanford Grist, Austin LaGuardia | Austin called this morning at 4:45am to report Dr. Grist was missing. Austin told me he fell asleep and when he woke up the door was open and Dr. Grist was gone. I called Tracy to make her aware and Ann C. Ann found Dr. grist walking up his road and brought him back home around 6:19am.. (Added to shift that Occurs once on 06/16/2021 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Austin LaGuardia)   |
| 06/18/2021 | Wanda Pace, Dr. Stanford Grist       | Texted weekend reminder -KC. (Added to shift that Repeats weekly on Friday starting on Jun 19, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 06/19/2021 | Dr. Stanford Grist                   | HARold - NO. (Added to shift that Repeats every 2 weeks on Saturday starting on Jun 19, 2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/19/2021 | Dr. Stanford Grist                   | Jeannie can not stay any longer. LG. (Added to shift that Repeats every 2 weeks on Saturday starting on Jun 19, 2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/19/2021 | Dr. Stanford Grist, Jeannie Truman   | LVM + text reminder weekend shift- KC. (Added to shift that Occurs once on 06/19/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 06/20/2021 | Ann Crippen, Dr. Stanford Grist      | Tracy texted and said Grist family is taking him out to eat. Ann agreed to stay until 6:30 and I told her how to dress him. - JA. (Added to shift that Occurs once on 06/20/2021 from 08:00 AM EDT to 06:30 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 06/20/2021 | Dr. Stanford Grist                   | HARold - NO. (Added to shift that Occurs once on 06/20/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/20/2021 | Wanda Pace, Dr. Stanford Grist       | Texted Wanda and let her know to not come in until 9pm. - JA. (Added to shift that Occurs once on 06/20/2021 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 06/22/2021 | Dr. Stanford Grist                   | Harold - asked. (Added to shift that Occurs once on 06/22/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/22/2021 | Dr. Stanford Grist                   | Jason - asked. (Added to shift that Occurs once on 06/22/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/22/2021 | Dr. Stanford Grist                   | Jeannie T- asked. (Added to shift that Occurs once on 06/22/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/23/2021 | Ann Crippen, Dr. Stanford Grist      | called left V/M to check on her. LG. (Added to shift that Occurs once on 06/23/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 06/23/2021 | Dr. Stanford Grist                   | Bret- called left V/M. LG. (Added to shift that Occurs once on 06/23/2021 from 08:00 AM EDT to 03:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/23/2021 | Dr. Stanford Grist                   | Daughter will have him during this time. LG (Added to shift that Occurs once on 06/23/2021 from 12:00 PM EDT to 03:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/23/2021 | Dr. Stanford Grist                   | Sandy L- NO. (Added to shift that Occurs once on 06/23/2021 from 08:00 AM EDT to 03:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/23/2021 | Dr. Stanford Grist                   | Shala P- NO. (Added to shift that Occurs once on 06/23/2021 from 08:00 AM EDT to 03:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/23/2021 | Dr. Stanford Grist                   | Shala P- going to call me back. (Added to shift that Occurs once on 06/23/2021 from 08:00 AM EDT to 03:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/23/2021 | Dr. Stanford Grist                   | Will Dr Grist be with Marilyn or Stacy at this time? -MM. (Added to shift that Occurs once on 06/23/2021 from 12:00 PM EDT to 03:30 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/23/2021 | Dr. Stanford Grist, Jeannie Truman   | Can Jeannie come in early? Tracy wants to know. I have texted Jeannie this PM. No response yet -MM. (Added to shift that Occurs once on 06/23/2021 from 03:30 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 06/23/2021 | Dr. Stanford Grist, Jeannie Truman   | Jeannie agreed to stay until 10pm to help Wanda -MM. (Added to shift that Occurs once on 06/23/2021 from 03:30 PM EDT to 10:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 06/23/2021 | Wanda Pace, Dr. Stanford Grist       | Wanda covering day shift (Added to shift that Occurs once on 06/23/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 06/23/2021 | Wanda Pace, Dr. Stanford Grist       | Wanda has agreed to this shift -MM. (Added to shift that Occurs once on 06/23/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 06/29/2021 | Ann Crippen, Dr. Stanford Grist      | Took Dr grist to the Dr and to get food -Kayla. (Added to shift that Repeats weekly on Tuesday starting on Jun 29, 2021 from 08:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 07/04/2021 | Wanda Pace, Dr. Stanford Grist       | LVM for Tracey - Wanda would like to take Dr. Grist to see fireworks in Hendersontonville and wants to confirm that's okay. - KC. (Added to shift that Repeats weekly on Sunday starting on Jul 04, 2021 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 07/04/2021 | Wanda Pace, Dr. Stanford Grist       | Tracey gave okay - KC. (Added to shift that Repeats weekly on Sunday starting on Jul 04, 2021 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |

| Date       | Related To  | Description  |
|------------|---|--|
| 07/05/2021 | Kerri Burnett (McCreary), Dr. Stanford Grist                  | <p>Hi Tracy,</p> <p>After our conversation on Friday, July 2nd regarding Dr. Grist, Brandon Cupstid, Director of Operations for Comfort Keepers called the Greenville County police department. Brandon spoke with Deputy Wilson. He specifically asked for the birthdates, addresses, and names of both Dr. S. Grist and Kerri Burnett.</p> <p>Deputy Wilson asked where was the video in question and if this video was in our possession. Brandon explained that we did not have the video in our possession. Deputy Wilson said in order to file a report or place charges on someone, concrete evidence is needed. He said the family of Dr. Grist would need to call the deputy's office to bring forth a police report and charges. He said the family doesn't need to give Comfort Keepers' the video because we are a 3rd party at this point, in relation to Kerri, because she was terminated.</p> <p>Per SC DHEC Regulations, any allegation of abuse, neglect, or exploitation of a client must be reported to Adult Protective Services. I called on Friday, July 2nd to make an adult referral. I spoke with a lady from the claims department today and information from the claim will be reviewed and a representative from APS will be in touch if there is enough information to move forward.</p> <p>To my knowledge Kerri Burnett was a part-time nursing student at Greenville Tech. She does not have an active CNA on file or in the SC CNA Registry. I did call and leave a message for someone in the area of Board of Nursing to call me back so I could file a complaint.</p> |
| 07/06/2021 | Dr. Stanford Grist  | <p>Tracy, I will update you as soon as I receive any information regarding the reporting agencies. Please let me know if I can be of assistance in any way. Erin Couchell</p> <p>Dr. Grist's next doctor appointments are July 6th at the Galen office for labs and July 8th at Galen for a follow up appointment. 10 am for both.<br/>Thanks!. (Added to shift that Occurs once on 07/06/2021 from 08:00 AM EDT to 09:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)</p>  |
| 07/08/2021 | Dr. Stanford Grist  | <p>Dr. Grist's next doctor appointments are July 6th at the Galen office for labs and July 8th at Galen for a follow up appointment. 10 am for both.<br/>Thanks!. (Added to shift that Occurs once on 07/08/2021 from 07:00 AM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)</p>  |
| 07/09/2021 | Delaine Oxentine, Ann Crippen, Wanda Pace, Dr. Stanford Grist | <p>Good afternoon! Dr. Grist's medication has been refilled for the time being. He has been given a new thyroid pill that must be given at early afternoon (around 2 pm) *on an empty stomach*. You will see there is a "PM" pill box that only has 3 pills each day. In that box there will be 2 identical pills, these are his thyroid pills. The other pill is his Donepezil HCL tablet, which is be taken at night with his other medication as usual.</p> <p>I know this might sound confusing, so please do not hesitate to reach out with any questions. Thanks so much!</p>  |
| 07/10/2021 | Delaine Oxentine, Dr. Stanford Grist                          | <p>Delaine confirmed weekend schedule -HP. (Added to shift that Occurs once on 07/10/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine)</p>  |
| 07/11/2021 | Dr. Stanford Grist  | <p>Marilyn will have him during this time. LG (Added to shift that Occurs once on 07/11/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>  |
| 07/17/2021 | Dr. Stanford Grist  | <p>Chris S- NO. (Added to shift that Repeats every 2 weeks on Saturday starting on Jul 31, 2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 07/17/2021 | Dr. Stanford Grist  | <p>Lindsay</p> <p>Marilyn wants to take Dr Grist to dinner Saturday July 17 7-9. Please change schedule accordingly</p>  |
| 07/17/2021 | Dr. Stanford Grist, Jeannie Truman                            | <p>Thanks</p> <p>Tracy (Added to shift that Occurs once on 07/17/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p> <p>I have a message out to Jeannie to see if she can stay until 4pm. LG. (Added to shift that Occurs once on 07/17/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)</p>   |
| 07/17/2021 | Dr. Stanford Grist, Jeannie Truman                            | <p>Jeannie called back to state she can only stay until 3pm. LG. (Added to shift that Occurs once on 07/17/2021 from 08:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)</p>  |
| 07/17/2021 | Dr. Stanford Grist, Jeannie Truman                            | <p>Jeannie is good to stay until 4pm. LG. (Added to shift that Occurs once on 07/17/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)</p>   |
| 07/19/2021 | Dr. Stanford Grist  | <p>Rode with Mia to Dr. Grist and filled his med boxes</p> <p>Refills are needed on as follows:</p> <ul style="list-style-type: none"> <li>Donepezil HCL 1</li> <li>Levothyroxine 50 MCG</li> <li>Potassium 1 daily.</li> </ul> <p>Also, I was short on the green box for Sunday<br/>as well as the blue med boxes for all 7 days on the PV for Levothyroxine 50 MCG.</p>  |
| 07/22/2021 | Dr. Stanford Grist  | <p>Remind Delaine that she's on this night -HP. (Added to shift that Occurs once on 07/22/2021 from 09:00 PM EDT to 10:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>  |
| 07/24/2021 | Dr. Stanford Grist  | <p>Per Tracy, Stacy taking client to dinner -JA (Added to shift that Occurs once on 07/24/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>  |
| 07/27/2021 | Dr. Stanford Grist  | <p>Jennie T- NO. (Added to shift that Occurs once on 07/27/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 07/27/2021 | Dr. Stanford Grist  | <p>Kristyn - NO. (Added to shift that Occurs once on 07/27/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 07/27/2021 | Dr. Stanford Grist  | <p>MARY Z- NO. (Added to shift that Occurs once on 07/27/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 07/31/2021 | Dr. Stanford Grist  | <p>Per Tracy Marilyn will be there. LG (Added to shift that Occurs once on 07/31/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)</p>   |
| 07/31/2021 | Wanda Pace, Dr. Stanford Grist                                | <p>Wanda is aware Marilyn is coming and to arrive at 9pm. LG. (Added to shift that Occurs once on 07/31/2021 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)</p>   |
| 08/02/2021 | Dr. Stanford Grist  | <p>Give Anne, main caregiver, a call and arrange a good time to go and fill Grist pill box with Levothyroxine. You will need to call Walgreens Pharmacy on E. North St in Greenville and have it filled and pick up. Take company card with you and turn receipt in. Go ahead and ask Pharmacist if any of his other medicines can go ahead and be refilled at this time. An up to date Med list is in the files. Dorene has been filling his med box and will be happy to help with any questions or even go with you if needed. The Levothyroxine runs out end of day on 8/6.</p>  |

| Date       | Related To                           | Description   |
|------------|--------------------------------------|---|
| 08/05/2021 | Dr. Stanford Grist                   | First I went to Walgreens and picked up his medication. Then I went to see Dr. Grist. He was napping while I was there which gave me an opportunity to fix his med boxes for the next month. He has been refusing his vitamins for about three weeks now so I only put in his prescribed medications in the box. I will let his family know. He did wake-up the last 5mins and was very pleasant. He invited me to walk with him the next time I came and let him know that I would love that and would bring my tennis shoes.                      |
| 08/07/2021 | Dr. Stanford Grist                   | MArilyn is coming. LG (Added to shift that Occurs once on 08/07/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 08/09/2021 | Wanda Pace, Dr. Stanford Grist       | Dr. Grist took off in the field last night around 9pm. It was getting dark. Wanda called to report this AM and was concerned. Thankfully, she knew what to do. He was on the hunt for a yellow bag. Wanda blocked his path when she caught up to him. She ended up finding a yellow bag and it made him so happy. She wanted to call and report.<br>Delaine confirmed Thursday night reminder -HP. (Added to shift that Occurs once on 08/12/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine) |
| 08/12/2021 | Delaine Oxentine, Dr. Stanford Grist | LVM for Delaine reminding her of overnight shift -HP. (Added to shift that Occurs once on 08/12/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine)  |
| 08/12/2021 | Delaine Oxentine, Dr. Stanford Grist | Per Tracy Marilyn will be there from 7pm-9pm. LG (Added to shift that Occurs once on 08/14/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/14/2021 | Dr. Stanford Grist                   | I have sent Jason a text about Marilyn coming. LG. (Added to shift that Occurs once on 08/14/2021 from 02:00 PM EDT to 07:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 08/14/2021 | Jason Corpening, Dr. Stanford Grist  | I have texted and called Wanda to make her aware of the time change. LG. (Added to shift that Occurs once on 08/14/2021 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 08/14/2021 | Wanda Pace, Dr. Stanford Grist       | Per Tracy Marilyn will be there during this time. LG (Added to shift that Occurs once on 08/16/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/16/2021 | Dr. Stanford Grist                   | Tracy stated that Marilyn is coming. LG (Added to shift that Occurs once on 08/17/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 08/17/2021 | Dr. Stanford Grist                   | Ann the caregiver for Dr. Grist called and let us know that he was experiencing pain in his left hand and hip. Also, she stated that the skin in those areas have a fine rash on it. Finally she let me know that he has been experiencing hallucinations and wanted to see if we could call Tracy and see about getting him in to see his PCP. I did speak to Tracy and she setup an appointment for Friday the 20th @ 10am. I called and let Ann know of the appointment. I will follow-up after the appointment.                                 |
| 08/18/2021 | Dr. Stanford Grist                   |   |
| 08/19/2021 | Ann Crippen, Dr. Stanford Grist      | Ann needs this day off. LG. (Added to shift that Repeats weekly on Thursday starting on Jul 15, 2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 08/19/2021 | Dr. Stanford Grist                   | Per Tracy Marilyn will be there during this time. LG (Added to shift that Occurs once on 08/19/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/19/2021 | Dr. Stanford Grist, Tracy Parsons    | Call Tracy at 11am to discuss Dr. Grist   |
| 08/20/2021 | Dr. Stanford Grist                   | Call and check on Dr. Grist after 10am doctor appointment.  |
| 08/21/2021 | Dr. Stanford Grist                   | Per Tracy Marilyn will be there during this time. LG (Added to shift that Occurs once on 08/21/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/21/2021 | Dr. Stanford Grist                   | Per Tracy Marilyn will be there during this time. LG. (Added to shift that Occurs once on 08/21/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 08/24/2021 | Dr. Stanford Grist                   | I went to see Dr. Grist today and fill his medication box. Before going I stopped at the pharmacy and picked up prescriptions and the over the counter medications requested by the doctor. After filling the pill boxes, Dr. Grist wanted me to go take a walk and look at his trees with him. We both enjoyed the walk and then I left.   |
| 08/24/2021 | Dr. Stanford Grist                   | Pickup prescriptions from Walgreens   |
| 08/30/2021 | Dr. Stanford Grist                   | Go setup the clients med boxes<br>Caregivers called: JH<br>Adekunle - Left VM<br>James Jenkins - left message   |
| 08/30/2021 | Dr. Stanford Grist                   | Crystal Mallett - At her other inh. (Added to shift that Occurs once on 08/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 08/30/2021 | Dr. Stanford Grist                   | Chinelo - left vm. (Added to shift that Occurs once on 08/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/30/2021 | Dr. Stanford Grist                   | delaine no - bk. (Added to shift that Occurs once on 08/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/30/2021 | Dr. Stanford Grist                   | LM for Pearl - bk. (Added to shift that Occurs once on 08/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 08/30/2021 | Wanda Pace, Dr. Stanford Grist       | Wanda stated that she stepped in a hole and twisted her ankle. She said it's very swollen and she wants to see if we can find someone for this shift tonight - bk. (Added to shift that Occurs once on 08/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 08/31/2021 | Wanda Pace, Dr. Stanford Grist       | make sure she's good to go back - bk. (Added to shift that Occurs once on 08/31/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 08/31/2021 | Wanda Pace, Dr. Stanford Grist       | Wanda is good to return. LG. (Added to shift that Occurs once on 08/31/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 09/05/2021 | Ann Crippen, Dr. Stanford Grist      | Check on her -Kayla. (Added to shift that Occurs once on 09/05/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 09/05/2021 | Wanda Pace, Dr. Stanford Grist       | Wanda is good to work. LG. (Added to shift that Occurs once on 09/05/2021 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 09/06/2021 | Wanda Pace, Dr. Stanford Grist       | Wanda is good to work. LG. (Added to shift that Occurs once on 09/06/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 09/10/2021 | Wanda Pace, Dr. Stanford Grist       | LVM for weekend reminder - MS. (Added to shift that Repeats weekly on Friday starting on Sep 11, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 09/11/2021 | Dr. Stanford Grist                   | Marilyn wants dr grist Saturday 7-9. Can you please schedule? Tracy (Added to shift that Occurs once on 09/11/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 09/11/2021 | Dr. Stanford Grist                   | Marilyn wants dr grist Saturday 7-9. Can you please schedule?   |
| 09/11/2021 | Wanda Pace, Dr. Stanford Grist       | Tracy. (Added to shift that Occurs once on 09/11/2021 from 07:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 09/16/2021 | Delaine Oxentine, Dr. Stanford Grist | Wanda is aware Marilyn will be there and to come in at 9pm. LG. (Added to shift that Occurs once on 09/11/2021 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 09/17/2021 | Ann Crippen, Dr. Stanford Grist      | Delaine requesting to not come back to Dr. Grist due to caregiver calling out after her and her having to stay late. - KC. (Added to shift that Repeats weekly on Thursday starting on Sep 17, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine)   |
| 09/17/2021 | Ann Crippen, Dr. Stanford Grist      | Deborah B - LVM<br>Nancy B - LVM. (Added to shift that Occurs once on 09/17/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 09/17/2021 | Ann Crippen, Dr. Stanford Grist      | Harold - Sent text<br>Jason - LVM   |
| 09/19/2021 | Dr. Stanford Grist                   | Jeanie- Sent text - KC. (Added to shift that Occurs once on 09/17/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 09/20/2021 | Dr. Stanford Grist                   | Harold-NO. (Added to shift that Occurs once on 09/19/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 09/22/2021 | Ann Crippen, Dr. Stanford Grist      | Can Wanda handle going back tonight? -HP. (Added to shift that Occurs once on 09/20/2021 from 08:00 PM EDT to 09:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 09/22/2021 | Dr. Stanford Grist                   | Ann needs one more day to rest. LG (Added to shift that Occurs once on 09/22/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 09/22/2021 | Dr. Stanford Grist                   | Before I went to see Dr. Grist I stopped at Walgreens and picked up 2 medications. Then when I arrived at the home Dr. Grist was sitting at the table drinking some water. I filled as many boxes as I could but he has three medications that will run out on 9/28 and 10/7 so I will have to pick them up and add them to the boxes. As I was leaving Dr. Grist walked me to the door.  |

| Date       | Related To  | Description  |
|------------|---|--|
| 09/22/2021 | Dr. Stanford Grist, Jeannie Truman  | Wanda texted the on call phone that Jeannie can do this night for her, Follow up with Jeannie to confirm -Kayla. (Added to shift that Occurs once on 09/22/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)  |
| 09/23/2021 | Delaine Oxentine, Dr. Stanford Grist  | Delaine is good to return. LG. (Added to shift that Occurs once on 09/23/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine)  |
| 09/23/2021 | Delaine Oxentine, Dr. Stanford Grist  | Delaine requesting to not come back to Dr. Grist due to caregiver calling out after her and her having to stay late. - KC. (Added to shift that Repeats weekly on Thursday starting on Sep 24, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine)  |
| 09/25/2021 | Dr. Stanford Grist  | Lindsey:<br><br>Marilyn wants to take Stan to dinner Saturday 6-8. Please change schedule.   |
| 09/28/2021 | Dr. Stanford Grist  | Tracy (Added to shift that Occurs once on 09/28/2021 from 06:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)<br>When I got there Dr.Grist was standing at the door waiting on me. I went in and put the thyroid medication in the boxes and talked with him for awhile. He is very nervous about going to town in the car.  |
| 09/29/2021 | Harold Hughes, Dr. Stanford Grist   | Harold reported that he was potentially exposed to COVID last wednesday - his friend texted him and told him that he tested positive the other day and started showing symptoms on Friday. It's been a week and Harold is not showing any symptoms (he also previously had COVID). He is okay to continue working per Heather. - KC. (Added to shift that Occurs once on 09/29/2021 from 03:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes) |
| 09/29/2021 | Wanda Pace, Dr. Stanford Grist  | Wanda requested off. LG. (Added to shift that Repeats weekly on Wednesday starting on Sep 30, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 10/02/2021 | Dr. Stanford Grist  | Marilyn wants to take Stan to dinner Saturday from 6-8. Please make changes to schedule.<br><br>Thank you  |
| 10/06/2021 | Dr. Stanford Grist  | Tracy (Added to shift that Occurs once on 10/07/2021 from 06:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)<br>Go by Walgreens and pickup medications and 10:30am go put in boxes.   |
| 10/07/2021 | Ann Crippen, Wanda Pace, Dr. Stanford Grist   | Good Morning Ladies,<br>We have been able to schedule a meeting with Tracy on October 14th at 11am at the office. Please let me know if you have a schedule conflict. Also, Tracy asked that you please let us know as soon as possible if there are any more hitting episodes. We have to make a paper trail and if we wait to long then it is invalid. Thanks for the great care you give Dr. Grist.   |
| 10/07/2021 | Harold Hughes, Dr. Stanford Grist   | Called Harold Hughes as he missed clock in, need to see how far he is from Dr. Grist. - JH. (Added to shift that Occurs once on 10/07/2021 from 08:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 10/07/2021 | Wanda Pace, Dr. Stanford Grist  | Wanda said that she can stay another hour and then she needs to leave, Harold has not arrived yet at this time. - JH. (Added to shift that Occurs once on 10/06/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 10/09/2021 | Harold Hughes, Dr. Stanford Grist   | Harold needs this day off. LG. (Added to shift that Occurs once on 10/09/2021 from 02:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 10/14/2021 | Dr. Stanford Grist  | Harold will take Dr. Grist at 1pm. I gave him the address. -HP. (Added to shift that Occurs once on 10/14/2021 from 09:00 AM EDT to 10:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 10/14/2021 | Dr. Stanford Grist  | See Stacy's text - she wants Dr. Grist brought to Duke's Sandwich at Cherrdale at 1. Harold has not been called yet. - bk. (Added to shift that Occurs once on 10/14/2021 from 09:00 AM EDT to 10:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/14/2021 | Harold Hughes, Dr. Stanford Grist   | Harold picked up every Thursday starting on 10/14. LG. (Added to shift that Repeats weekly on Thursday starting on Oct 14, 2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 10/16/2021 | Dr. Stanford Grist  | Marilyn will have him from 6pm-8pm per Tracy. LG (Added to shift that Occurs once on 10/16/2021 from 06:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/20/2021 | Ann Crippen, Dr. Stanford Grist   | Spoke with Ann and confirmed she can take Dr.Grist to Atlanta Bread -- JH. (Added to shift that Repeats weekly on Wednesday starting on Oct 20, 2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 10/23/2021 | Dr. Stanford Grist, Jeannie Truman  | Jeannie needs to pause weekends from 10/17-1/1. -HP. (Added to shift that Repeats every 2 weeks on Saturday starting on Oct 23, 2021 from 08:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jeannie Truman)   |
| 10/25/2021 | Ann Crippen, Dr. Stanford Grist   | ann needs off. LG. (Added to shift that Repeats weekly on Monday starting on Oct 04, 2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 10/25/2021 | Dr. Stanford Grist  | Harold- NO. (Added to shift that Occurs once on 10/25/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 10/25/2021 | Dr. Stanford Grist  | Jeannie T- NO. (Added to shift that Occurs once on 10/25/2021 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 10/28/2021 | Dr. Stanford Grist  | I went to see Dr. Grist today. He was just coming in from a walk when I arrived. He seemed to be in good spirits. I had picked up a medication and then went to fill his med boxes for the month. I have 2 medications that will be picked up on Thursday the 4th and added to the boxes.  |
| 10/29/2021 | Wanda Pace, Dr. Stanford Grist  | LVM for F,S,Sunday shifts-JR. (Added to shift that Repeats weekly on Friday starting on Oct 30, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 10/29/2021 | Wanda Pace, Dr. Stanford Grist  | LVM for weekend reminder-JR. (Added to shift that Repeats weekly on Friday starting on Oct 30, 2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 10/30/2021 | Dr. Stanford Grist, Laurie James  | Laurie's mom is passing.LG (Added to shift that Occurs once on 10/30/2021 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Laurie James)  |
| 10/31/2021 | Ann Crippen, Dr. Stanford Grist   | Check on her -kayla. (Added to shift that Occurs once on 10/31/2021 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 10/31/2021 | Dr. Stanford Grist  | Tracy Parsons called and stated that Marilyn would be taken Dr Grist to dinner (Added to shift that Occurs once on 10/31/2021 from 06:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 11/03/2021 | Dr. Stanford Grist  | I went by Walgreens on my way to see Dr. Grist. I picked up 3 medications. When I arrived Dr. Grist was resting on the couch. I was able to fill the boxes that needed the refills. I will need to call and get refills for the Liothyronine from Dr. Wong by Thursday 11/11.  |
| 11/04/2021 | Dr. Stanford Grist  | Pick up Potassium and levothyroxine and put in boxes.  |
| 11/06/2021 | Dr. Stanford Grist  | Client staying over night with Stacey due to Wanda being sick. Handled by Megan - KC (Added to shift that Occurs once on 11/06/2021 from 08:00 PM EDT to 08:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 11/06/2021 | Wanda Pace, Dr. Stanford Grist  | Caregiver sick—MG (Added to shift that Occurs once on 11/06/2021 from 08:00 PM EDT to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 11/07/2021 | Ann Crippen, Dr. Stanford Grist   | Ann to pick up Dr. Grist's from Staceys. - KC. (Added to shift that Occurs once on 11/07/2021 from 11:00 AM EST to 05:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 11/07/2021 | Laurie picked up this shift for a \$3 shift premium. - KC. (Added to shift that Occurs once on 11/07/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Laurie James) |  |
| 11/07/2021 | Wanda Pace, Dr. Stanford Grist  | Make sure she is feeling better—MG. (Added to shift that Occurs once on 11/07/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 11/07/2021 | Wanda Pace, Dr. Stanford Grist  | Wanda texted in at 4pm saying she still does not feel well and is unable to work tomorrow evening. - KC (Added to shift that Occurs once on 11/07/2021 from 07:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 11/08/2021 | Wanda Pace, Dr. Stanford Grist  | Wanda said she is good to work tonight. LG. (Added to shift that Occurs once on 11/08/2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |

| Date       | Related To   | Description   |
|------------|--|---|
| 11/11/2021 | Dr. Stanford Grist                                       | Pickup the Liothyronine by the 11am meeting.  |
| 11/11/2021 | Dr. Stanford Grist                                       | Today we had a meeting with Tracy Dr. Grist's court appointed guardian. She updated us on his legal proceedings. We also discussed that if Dr. Grist does not get stronger over the weekend from his illness to let her know and she will get an order for PT evaluation. Also, we discussed some issues with caregiving and I will address the lack of after shift communication with Dee, Ann will cook enough food on Wed. so that Harold can serve left overs on Thursday, and I will make a chore list by shift to address the lack of household chores getting done. We agreed to meet again on Dec. 9th at 11am.             |
| 11/21/2021 | Dr. Stanford Grist, Kreszena "Kris" May                  | misscheduled this visit (Added to care log on 11/21/2021 from 02:00 PM EST to 03:00 PM EST for Grist, Dr. Stanford, assigned to caregiver May, Kreszena "Kris")   |
| 11/23/2021 | Dr. Stanford Grist                                       | Dr. Grist Medication boxes  |
| 11/24/2021 | Wanda Pace, Dr. Stanford Grist                           | **Have to go pickup Terbinafine on Monday 29th.<br>Wanda is good to work this shift. LG. (Added to shift that Repeats weekly on Wednesday starting on Nov 25, 2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 11/25/2021 | Delaïne Oxentine, Dr. Stanford Grist                     | Delaïne is good to work this shift. LG. (Added to shift that Repeats weekly on Thursday starting on Nov 26, 2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Delaïne Oxentine)  |
| 11/25/2021 | Harold Hughes, Dr. Stanford Grist                        | Harold confirmed he will work this shift - bk. (Added to shift that Occurs once on 11/25/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 11/26/2021 | Dr. Stanford Grist                                       | I went to see Dr. Grist on Tuesday. He was napping when I got there. I set his medication up. He will have several mediations that will run out through out the month. I will be picking up a medication on Monday 11/29 and adding it to the box.  |
| 11/30/2021 | Dr. Stanford Grist                                       | I picked up three medications from Walgreens on the way out to see Dr. Grist. When I arrived he had his coat on and was wanting to head out. He did hangout with me till I finished filling his medication boxes. Then he asked me if there was anything he could take for his memory. I explained to him that he was taking a medication at bedtime for memory and that was all that I knew was available. He accepted this answer.  |
| 12/03/2021 | Dr. Stanford Grist                                       | I called and left Harold a message asking him to call me so I could discuss the meals he feeds Dr. Grist. If he does not call back today I will follow-up on Monday.  |
| 12/03/2021 | Dr. Stanford Grist                                       | I called Delaïne and I had to leave a message. I did explain on the messages that I needed her to call us first if Dr. Grist runs off so that we are aware. I will follow-up on Monday if she does not call me first.   |
| 12/20/2021 | Dr. Stanford Grist                                       | I went to see Dr. Grist today. He was finishing lunch up when I arrived. They are just finishing a very nice ramp on the back of the house. I was able to setup the next months meds. he will need Potassium by the 1/20 in order not to run out. He goes to the doctor tomorrow so we will see if he will continue the potassium since the family wants t stop it because they feel the pill is to large for him to swallow. There has not been any evidence to me that he is struggling with that.  |
| 12/20/2021 | Dr. Stanford Grist                                       | Setup Medications for the next month. Check with pharmacy before going.   |
| 12/21/2021 | Dr. Stanford Grist, Stacey Grist                         | I spoke to Stacey about the plumbing needs at Dr. Grist's. She said she will call a Plumber and get them out as quick as possible but with the holidays she isn't sure when they will be able to get there.   |
| 12/23/2021 | Delaïne Oxentine, Dr. Stanford Grist                     | She is good to work this. LG. (Added to shift that Repeats weekly on Thursday starting on Dec 24, 2021 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Delaïne Oxentine)  |
| 12/24/2021 | Dr. Stanford Grist                                       | Are they good with double pay for Dr. Grist for all shifts? Are caregivers good to work? -HP. (Added to shift that Occurs once on 12/24/2021 from 08:00 AM EST to 09:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 12/25/2021 | Ann Crippen, Dr. Stanford Grist                          | He needs off this day because its his birthday. (Added to shift that Occurs once on 12/25/2021 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 12/25/2021 | Dr. Stanford Grist                                       | Per Tray Marilyn will have him during this time. LG (Added to shift that Occurs once on 12/25/2021 from 11:00 AM EST to 06:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 01/07/2022 | Ann Crippen, Dr. Stanford Grist                          | Ann wanted to know if Grist got a shower with Harold yesterday bc he did not document. I called Harold he said no and knows to document yes or no from now on. Relayed to Ann-JR. (Added to shift that Repeats weekly on Friday starting on Jan 07, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 01/13/2022 | Ann Crippen, Dr. Stanford Grist                          | Hey Ann! Just placed the online order. Publix didn't have assorted gatorade's so I ordered a pack of blue for him. They also didn't have the chick pea veggie crisps so I ordered an alternative veggie chip. I'll keep an eye on the cart to see if they alert me of any out of stock items and be sure to keep you updated! Thanks again!!  |
| 01/13/2022 | Harold Hughes, Dr. Stanford Grist                        | Janie<br>let harold know groceries were coming and to put them away when they get there and to not take the gate remote per wanda-jr. (Added to shift that Repeats weekly on Thursday starting on Jan 13, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 01/14/2022 | Delaïne Oxentine, Harold Hughes, Ann Crippen, Wanda Pace | Good Morning All!<br>As you may know we have switched to instacart online delivery groceries. If everyone could be extra mindful to get these groceries inside in a timely manner as well as making sure no food is left outside or has fallen. With coyotes and other creatures we want to be extra careful not to attract any dangerous critters that could affect your safety.   |
| 01/14/2022 | Dr. Stanford Grist                                       | Thank you all!<br>Call and remind Ann to get a Covid Antigen test drawn. Call before 10am.  |
| 01/15/2022 | Wanda Pace, Dr. Stanford Grist                           | Wanda is packing a bag and is willing to live-in and know it will be straight pay. LG. (Added to shift that Occurs once on 01/15/2022 from 06:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 01/16/2022 | Ann Crippen, Dr. Stanford Grist                          | caregiver cannot get there due to snow--MG (Added to shift that Occurs once on 01/16/2022 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 01/16/2022 | Wanda Pace, Dr. Stanford Grist                           | Wanda will stay due to snow. DO NOT PAY OVERTIME--MG. (Added to shift that Occurs once on 01/16/2022 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 01/17/2022 | Ann Crippen, Dr. Stanford Grist                          | cannot get there due to snow--MG (Added to shift that Occurs once on 01/17/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 01/18/2022 | Ann Crippen, Dr. Stanford Grist                          | Ann says she is going to try -Kayla. (Added to shift that Repeats weekly on Tuesday starting on Jan 18, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 01/18/2022 | Delaïne Oxentine, Dr. Stanford Grist                     | asked delaine to come in at 7 per Ann for the roads-jr. (Added to shift that Occurs once on 01/18/2022 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Delaïne Oxentine)  |
| 01/18/2022 | Wanda Pace, Dr. Stanford Grist                           | Wanda needs tonight off to rest. LG (Added to shift that Occurs once on 01/18/2022 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 01/19/2022 | Wanda Pace, Dr. Stanford Grist                           | Pulled Wanda to have a night off. LG (Added to shift that Occurs once on 01/19/2022 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 01/20/2022 | Delaïne Oxentine, Dr. Stanford Grist                     | Good Morning!<br>If everyone could remember to turn off Dr. Grist's alarm door when he gets up or before you leave that would be extremely helpful! Thanks so much!   |
| 01/21/2022 | Dr. Stanford Grist                                       | Janie<br>Dr. Grist has a doctor's appt at 10am with Dr. Wong  |
| 01/24/2022 | Ann Crippen, Dr. Stanford Grist                          | dentist appt at 9:15am, Ann aware and taking him-jr. (Added to shift that Repeats weekly on Monday starting on Jan 24, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 01/24/2022 | Ann Crippen, Dr. Stanford Grist                          | I message Ann about this appointment to remind her. LG. (Added to shift that Repeats weekly on Monday starting on Jan 24, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 01/26/2022 | Delaïne Oxentine, Harold Hughes, Ann Crippen, Wanda Pace | Good Afternoon!<br>I wanted to make sure you all had Dr. Grist's updated gate code. It is now 9154*   |
| 01/27/2022 | Harold Hughes, Dr. Stanford Grist                        | Thank you!<br>Janie<br>wanda called that harold put in the wrong code. I texted all CG's yesterday with updated code. He opened the gate by hand and now it won't close according to Wanda. I had harold go put in the correct code to see if it closed/reset and it did not. tracy know. She was unaware gate code was changed and wanted to know why. Kris texted me the new gate code yesterday so texted kris to see if she knew why it was changed-jr. (Added to shift that Repeats weekly on Thursday starting on Jan 27, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes) |
| 01/28/2022 | Wanda Pace, Dr. Stanford Grist                           | LM weekend reminder - th. (Added to shift that Repeats weekly on Friday starting on Jan 29, 2022 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |

| Date       | Related To                           | Description   |
|------------|--------------------------------------|---|
| 01/31/2022 | Dr. Stanford Grist                   | I got Dr. Grist's dentist appointment changed to Thursday at 11am.  |
| 02/01/2022 | Ann Crippen, Dr. Stanford Grist      | Dr. Grist has an appointment at 111 West Wade Hampton Blvd with Jack Davis at 9am. Ann is aware - kc. (Added to shift that Occurs once on 02/01/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 02/03/2022 | Ann Crippen, Dr. Stanford Grist      | Dr. Grist has an appointment at 111 West Wade Hampton Blvd with Jack Davis at 11am. Ann is aware- LG. (Added to shift that Repeats weekly on Thursday starting on Feb 03, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 02/03/2022 | Harold Hughes, Dr. Stanford Grist    | He knows not to go LG (Added to shift that Occurs once on 02/03/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)   |
| 02/03/2022 | Harold Hughes, Dr. Stanford Grist    | Pull Harold. LG. (Added to shift that Repeats weekly on Thursday starting on Feb 03, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Harold Hughes)  |
| 02/04/2022 | Delaine Oxentine, Dr. Stanford Grist | Diane confirmed weekend schedule -HP. (Added to shift that Occurs once on 02/04/2022 from 04:00 PM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Delaine Oxentine)  |
| 02/07/2022 | Ann Crippen, Dr. Stanford Grist      | Caregiver called out sick 2 hrs before shift (Added to shift that Occurs once on 02/07/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 02/08/2022 | Ann Crippen, Dr. Stanford Grist      | make sure she is feeling better to return--MG. (Added to shift that Occurs once on 02/08/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 02/12/2022 | Dr. Stanford Grist                   | Lindsay<br><br>Marilyn wants to pick up dr grist Saturday 4-6.<br><br>Thanks<br><br>Tracy<br>(Added to shift that Occurs once on 02/12/2022 from 04:00 PM EST to 06:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 02/12/2022 | Wanda Pace, Dr. Stanford Grist       | Wanda knows to go in at 6p. LG. (Added to shift that Occurs once on 02/12/2022 from 06:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 02/19/2022 | Dr. Stanford Grist                   | Lindsay<br><br>Marilyn wants to take Dr Grist 4-6 Saturday. (Added to shift that Occurs once on 02/19/2022 from 04:00 PM EST to 06:00 PM EST for Dr. Stanford Grist; no caregiver assigned)<br>Stacy G (dr grist daughter) text in "please bring dr Grist Tuesday to the Cooks Station at 12:30" Please remind Ann C this on Monday--MG. (Added to shift that Occurs once on 02/21/2022 from 04:00 PM EST to 05:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 02/21/2022 | Dr. Stanford Grist                   | The attorney wants to see him next Wednesday, February 23 at 10:00am. (Added to shift that Repeats weekly on Wednesday starting on Feb 23, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 02/23/2022 | Ann Crippen, Dr. Stanford Grist      | The attorney wants to see him next Wednesday, February 23 at 10:00am. (Added to shift that Occurs once on 02/23/2022 from 08:00 AM EST to 09:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/23/2022 | Dr. Stanford Grist                   | Ann needs off. LG. (Added to shift that Repeats weekly on Thursday starting on Feb 17, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 02/24/2022 | Ann Crippen, Dr. Stanford Grist      | called Carol for a TLC call on 2-25 after she was injured-jr. (Added to shift that Occurs once on 02/24/2022 from 02:00 PM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/24/2022 | Dr. Stanford Grist                   | Carol- asked. (Added to shift that Occurs once on 02/24/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/24/2022 | Dr. Stanford Grist                   | Harold- NO. (Added to shift that Occurs once on 02/24/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/24/2022 | Dr. Stanford Grist                   | I went to see Dr. Grist today and take his toe fungus medication. He was outside planting trees when I got there. I went ahead and filled what I could. He is needing his Lasix so I will have to take it to him on Monday on my way back to Spartanburg  |
| 02/24/2022 | Dr. Stanford Grist                   | Jenanie T- asked.. (Added to shift that Occurs once on 02/24/2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; no caregiver assigned)  |
| 02/24/2022 | Dr. Stanford Grist                   | Pick up toe fungus medication and take to put in the box.<br><br>** He has stomach virus will go on 2/24 instead.<br>The attorney wants to see him Tomorrow, February 24 at Noon. (Added to shift that Occurs once on 02/24/2022 from 09:00 AM EST to 10:00 AM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/24/2022 | Dr. Stanford Grist                   | Brandy needs to come off-jr. (Added to shift that Occurs once on 02/24/2022 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Brandy Ritchey)   |
| 02/24/2022 | Dr. Stanford Grist, Brandy Ritchey   | needs to shadow ann or wanda 2x before going-jr. (Added to shift that Occurs once on 02/24/2022 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Brandy Ritchey)   |
| 02/24/2022 | Dr. Stanford Grist, Carol Caras      | Unsafe Shift - [Carol Caras, Dr. Stanford Grist] task was created.  |
| 02/25/2022 | Ann Crippen, Dr. Stanford Grist      | Ann needs off. LG. (Added to shift that Repeats weekly on Friday starting on Feb 18, 2022 from 08:00 AM EST to 08:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 02/25/2022 | Dr. Stanford Grist                   | Tracy- Marilyn will have him during this time. LG (Added to shift that Occurs once on 02/25/2022 from 09:00 AM EST to 02:00 PM EST for Dr. Stanford Grist; no caregiver assigned)   |
| 02/27/2022 | Ann Crippen, Dr. Stanford Grist      | Ann needs off. LG. (Added to shift that Repeats weekly on Sunday starting on Feb 20, 2022 from 08:00 AM EST to 04:00 PM EST for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 02/28/2022 | Dr. Stanford Grist                   | I went to check on Dr. Grist today after his fall. I checked his vitals. BP was 152/80 Pulse 53. His hands were cold to get an O2 reading. I did ask him to walk with me to the bathroom and back. He is dragging his right foot. Also he seems to be more altered than normal. I asked him if he was ok and he stated that he just didn't feel right. I asked if he hurt anywhere and he stated no. Tray Parsons was also there when I visited. Finally I did put his Lasix in his boxes that I had picked up. |
| 02/28/2022 | Dr. Stanford Grist                   | Pick up lasix and potassium and fill pill box   |
| 03/03/2022 | Wanda Pace, Dr. Stanford Grist       | Unsafe Shift - [Wanda Pace, Dr. Stanford Grist] task was created.   |
| 03/06/2022 | Wanda Pace, Dr. Stanford Grist       | lvm to confirm weekend shifts- nb. (Added to shift that Repeats weekly on Sunday starting on Mar 06, 2022 from 04:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 03/07/2022 | Dr. Stanford Grist                   | I went to see Dr. Grist today. He was eating lunch when I arrived. He seems to be in better spirits but is still really confused. I asked Janie to please put in his profile that he does not need to be left alone at all. He is still stumbling when he walks and he needs directions when in the bathroom. I talked to Tracy and we are in agreement on his current condition and where to go from here.<br>Pickup Potassium and fill med box  |
| 03/07/2022 | Dr. Stanford Grist                   | Fill medication box   |
| 03/09/2022 | Dr. Stanford Grist                   | I went to see Dr. Grist today. He was doing PT when I arrived. His pulse was 54 today. He seemed to be in good spirits. I filled his pill boxes for the next month. However he will run out of Potassium in 2 weeks so I will return to fill it.  |
| 03/23/2022 | Dr. Stanford Grist                   | Ann needs to come off this as we have the monthly meeting with Tracy at 11AM-JR. (Added to shift that Occurs once on 03/24/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 03/24/2022 | Ann Crippen, Dr. Stanford Grist      | Ann needs to come off this as we have the monthly meeting with Tracy at 11AM-JR. (Added to shift that Occurs once on 03/24/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 03/24/2022 | Dr. Stanford Grist                   | Harold-NO. (Added to shift that Occurs once on 03/24/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 03/24/2022 | Dr. Stanford Grist                   | Mikala- NO. (Added to shift that Occurs once on 03/24/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 03/26/2022 | Dr. Stanford Grist, Jessica Triplett | Let Jessica know that Dr. Grist is going to be picked up by his daughter from 4:30-6:30 (double check those times)-jr. (Added to shift that Occurs once on 03/26/2022 from 08:00 AM EDT to 05:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)   |

| Date       | Related To                           | Description  |
|------------|--------------------------------------|--|
| 03/30/2022 | Dr. Stanford Grist                   | I called and checked in with Ann to see how Dr. Grist is doing. She stated that Jennifer Browning had been there today and Dr. Grist was very agitated. His pulse has been holding in the upper 50's. BP was 130/83 today and O2 Sat was 97%. I let her know I will be coming next week to put the potassium in his box.   |
| 03/31/2022 | Dr. Stanford Grist, Jessica Triplett | Jessica has a Fever and cough. She is making a Dr. appointment. LG (Added to shift that Occurs once on 03/31/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 03/31/2022 | Dr. Stanford Grist, Jessica Triplett | said she was good for this shift but double check on her as she called off of Henriette on Wednesday due to feeling under the weather-jr. (Added to shift that Occurs once on 03/31/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)   |
| 04/03/2022 | Dr. Stanford Grist                   | meredith grist to pick up Dr. Grist 4:30-6:30PM - bk. (Added to shift that Occurs once on 04/03/2022 from 11:00 AM EDT to 12:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/04/2022 | Ann Crippen, Dr. Stanford Grist      | Stacy called me this morning to make us aware that Mickie came to Dr. Grist home yesterday but got scared and drove away.<br>Stacy wanted to make us all aware that if she comes on the property to call the police. They have a restraining order on her. LG. (Added to shift that Repeats weekly on Monday starting on Apr 11, 2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen) |
| 04/05/2022 | Dr. Stanford Grist                   | HArold- NO. (Added to shift that Occurs once on 04/05/2022 from 03:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/06/2022 | Ann Crippen, Dr. Stanford Grist      | Ann needs to be at home with her husband. LG (Added to shift that Occurs once on 04/06/2022 from 07:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 04/06/2022 | Ann Crippen, Dr. Stanford Grist      | Check on her. LG. (Added to shift that Occurs once on 04/06/2022 from 07:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 04/09/2022 | Wanda Pace, Dr. Stanford Grist       | Wanda requested off.LG. (Added to shift that Repeats weekly on Saturday starting on Mar 20, 2022 from 08:00 PM EDT to 07:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/12/2022 | Dr. Stanford Grist, April Stafford   | April can not work tonight. LG (Added to shift that Occurs once on 04/12/2022 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver April Stafford)  |
| 04/15/2022 | Wanda Pace, Dr. Stanford Grist       | wanda can stay until 12 but no later-jr. (Added to shift that Occurs once on 04/15/2022 from 08:00 PM EDT to 12:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 04/16/2022 | Dr. Stanford Grist                   | Ann-Unavailable-jr. (Added to shift that Occurs once on 04/16/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/16/2022 | Dr. Stanford Grist                   | asked wanda to stay late-jr  |
| 04/16/2022 | Dr. Stanford Grist                   | asked ann if she can cover any-ir. (Added to shift that Occurs once on 04/16/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 04/16/2022 | Jason Corpening, Dr. Stanford Grist  | Wanda can stay until 12pm but no later-jr. (Added to shift that Occurs once on 04/16/2022 from 12:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 04/16/2022 | Wanda Pace, Dr. Stanford Grist       | Jason's car is broken down, he will let us know if it gets fixed in time-jr (Added to shift that Occurs once on 04/16/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jason Corpening)  |
| 04/17/2022 | Wanda Pace, Dr. Stanford Grist       | Wanda is good to work. LG. (Added to shift that Occurs once on 04/16/2022 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 04/21/2022 | Ann Crippen, Dr. Stanford Grist      | Wanda is good to work. LG. (Added to shift that Occurs once on 04/17/2022 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 04/21/2022 | Ann Crippen, Dr. Stanford Grist      | Ann was not feeling well, so we got her shift covered - bk (Added to shift that Occurs once on 04/21/2022 from 09:30 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 04/22/2022 | Wanda Pace, Dr. Stanford Grist       | Wanda is staying over and Ann going to call around 9:30am with update (she's apparently dizzy) -HP. (Added to shift that Repeats weekly on Thursday starting on Apr 21, 2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 04/23/2022 | Dr. Stanford Grist, Jessica Triplett | Marylyn to pick up Grist from 4pm-6pm on Saturday-jr. (Added to shift that Occurs once on 04/22/2022 from 08:00 PM EDT to 10:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/23/2022 | Dr. Stanford Grist, Jessica Triplett | Marylyn to pick up Grist from 4pm-6pm on Saturday-jr. (Added to shift that Occurs once on 04/23/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)   |
| 04/23/2022 | Wanda Pace, Dr. Stanford Grist       | Tracy confirmed marylin's pick up-jr. (Added to shift that Occurs once on 04/23/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)   |
| 04/24/2022 | Wanda Pace, Dr. Stanford Grist       | Marylyn to pick up Grist from 4pm-6pm on Saturday. (Added to shift that Occurs once on 04/23/2022 from 06:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 04/27/2022 | Dr. Stanford Grist                   | Marylyn to pick up Grist from 4pm-6pm on Saturday-jr. (Added to shift that Repeats weekly on Sunday starting on Apr 24, 2022 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 04/28/2022 | Dr. Stanford Grist                   | Please bring Dr.Grist to cooks station tomorrow at 1:30 for lunch . Thanks. Text Ann to let her know (Make sure Janie confirms no further action is needed) -bk. (Added to shift that Occurs once on 04/27/2022 from 08:00 AM EDT to 09:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 04/28/2022 | Dr. Stanford Grist                   | Pickup medication and load medboxes  |
| 04/28/2022 | Dr. Stanford Grist                   | See if Debbie E can cover for 2 hours for Ann to come in the office to meet about Grist. Ask Kris for full details -HP. (Added to shift that Occurs once on 04/28/2022 from 09:00 AM EDT to 11:00 AM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/29/2022 | Dr. Stanford Grist                   | Today I went to Walgreens and picked up 2 medications and then went to the home to setup medication boxes for the next month. I will return in two weeks because he will need a refill on Liothyronine and it will need to be added to the boxes provided the doctor does not make any changes tomorrow.   |
| 04/29/2022 | Dr. Stanford Grist                   | Chris M- asked. (Added to shift that Occurs once on 04/29/2022 from 03:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 04/29/2022 | Dr. Stanford Grist, Jessica Triplett | Paul- asked. (Added to shift that Occurs once on 04/29/2022 from 03:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 04/29/2022 | Dr. Stanford Grist, Jessica Triplett | Dr's Appt at 12:30, make jessica aware (Per Kris)-jr. (Added to shift that Repeats every 2 weeks on Friday starting on Apr 29, 2022 from 10:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 04/29/2022 | Dr. Stanford Grist, Jessica Triplett | reminded Jessica-jr. (Added to shift that Occurs once on 04/29/2022 from 10:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 04/29/2022 | Dr. Stanford Grist, Jessica Triplett | texted jessica about appt but remind her-jr. (Added to shift that Occurs once on 04/29/2022 from 10:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 04/29/2022 | Wanda Pace, Dr. Stanford Grist       | called and lvm regarding her weekend reminder. CN. (Added to shift that Repeats weekly on Friday starting on Apr 30, 2022 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 04/30/2022 | Dr. Stanford Grist, Jessica Triplett | marilyn needs Dr. G from 4-6pm Saturday -jr. (Added to shift that Occurs once on 04/30/2022 from 04:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 05/03/2022 | Dr. Stanford Grist                   | Dr. Grist 3 mo reassessment  |
| 05/03/2022 | Dr. Stanford Grist, April Stafford   | April's dad is back in the hospital. - bk (Added to shift that Occurs once on 05/03/2022 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver April Stafford)   |
| 05/05/2022 | Dr. Stanford Grist                   | Spoke with Stacy about her dads bill, she is waiting on new checks to be issued.   |
| 05/09/2022 | Wanda Pace, Dr. Stanford Grist       | Wanda requested off.LG. (Added to shift that Repeats weekly on Monday starting on Feb 22, 2022 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 05/12/2022 | Dr. Stanford Grist                   | I went by Walgreens and picked up Dr. Grist medication. They let me know that the insurance denied his toe fungus medication. When I got there he was sitting outside with Ann enjoying the beautiful day. I placed the medications in his boxes. I also was able to take the new medications Dr. Wong ordered and placed them in the box as well. I will be returning next week to add the three medications that will run out.   |
| 05/12/2022 | Dr. Stanford Grist                   | Pickup Liothyronine and fill medication boxes.   |
| 05/13/2022 | Dr. Stanford Grist                   | Sent email to all staff in On Call Rotation:   |

Hi Everyone,

I just want to make sure everyone is on the same page that is in the On Call Rotation. No one new can go to Dr. Grist at this time. If you get a call out, please call every caregiver in the current rotation. If there is absolutely no one to cover the shift then please call Tracy Parsons to discuss it with her for her direction on if she would like you to send a new face. Please document in ClearCare notes afterwards.

Thank you,  
Heather

| Date       | Related To                                  | Description  |
|------------|---|--|
| 05/13/2022 | Dr. Stanford Grist, Jessica Triplett        | Jessica is sick LG (Added to shift that Occurs once on 05/13/2022 from 10:00 AM EDT to 03:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 05/15/2022 | Ann Crippen, Dr. Stanford Grist             | Sent a reminder-LG. (Added to shift that Repeats weekly on Sunday starting on May 15, 2022 from 08:00 AM EDT to 04:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)  |
| 05/15/2022 | Wanda Pace, Dr. Stanford Grist              | sent a weekend reminder via message. CN. (Added to shift that Repeats weekly on Sunday starting on May 15, 2022 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 05/16/2022 | Dr. Stanford Grist                          | Call Dr. Wong about the toe fungus medication.   |
| 05/16/2022 | Wanda Pace, Dr. Stanford Grist              | **Secretary said they will call pharmacy for a reauthorization form. **<br>Wanda came in early on Sunday and she is needing to have a day off. - kc. (Added to shift that Occurs once on 05/16/2022 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 05/20/2022 | Dr. Stanford Grist, Jessica Triplett        | can she return? - bk. (Added to shift that Occurs once on 05/20/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)   |
| 05/20/2022 | Dr. Stanford Grist, Jessica Triplett        | Jessica is good to return. LG. (Added to shift that Occurs once on 05/20/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 05/21/2022 | Dr. Stanford Grist, Jessica Triplett        | I have a message out to her.LG. (Added to shift that Occurs once on 05/21/2022 from 04:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)   |
| 05/21/2022 | Wanda Pace, Dr. Stanford Grist              | Wanda requested off. LG. (Added to shift that Repeats weekly on Saturday starting on Feb 27, 2022 from 08:00 PM EST to 08:00 AM EST for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 05/22/2022 | Wanda Pace, Dr. Stanford Grist              | Wanda requested off. LG. (Added to shift that Repeats weekly on Sunday starting on May 08, 2022 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 05/24/2022 | Dr. Stanford Grist, April Stafford          | Can April come in at 8pm ongoing?-jr. (Added to shift that Repeats weekly on Tuesday starting on May 25, 2022 from 09:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver April Stafford)  |
| 05/25/2022 | Dr. Stanford Grist                          | Get prescriptions at Walgreens and then put in box   |
| 05/25/2022 | Dr. Stanford Grist                          | Today I went to Walgreens and picked up 3 prescriptions then headed to clients home. When I arrived Doc was resting on the couch and watching a movie. I filled the boxes for the month. I will need to order Lasix and Potassium before I return on 6/23 to refill for the month.   |
| 05/29/2022 | Wanda Pace, Dr. Stanford Grist              | Marylin requesting Dr. Grist Sunday 5-7pm-jr. (Added to shift that Occurs once on 05/29/2022 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 05/29/2022 | Wanda Pace, Dr. Stanford Grist              | Wanda is good to work. LG. (Added to shift that Occurs once on 05/29/2022 from 04:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 05/30/2022 | Dr. Stanford Grist                          | The following was billed on 5/30/2022:<br>\$130.16 Instacart on 4/25<br>\$150.46 InstaCart on 5/24<br>\$12.71 Walgreens on 5/22<br>\$17.15 Annapolis on 5/22   |
| 05/30/2022 | Wanda Pace, Dr. Stanford Grist              | Wanda is good to work. LG. (Added to shift that Occurs once on 05/30/2022 from 08:00 PM EDT to 08:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)  |
| 06/02/2022 | Dr. Stanford Grist                          | Could not fill this shift, Stacy is going to get him.LG. (Added to shift that Occurs once on 06/02/2022 from 03:00 PM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/02/2022 | Wanda Pace, Dr. Stanford Grist              | Wanda is going to let me know if she can work this shift. LG. (Added to shift that Occurs once on 06/02/2022 from 08:00 PM EDT to 10:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Wanda Pace)   |
| 06/04/2022 | Dr. Stanford Grist                          | see text for details - bk. (Added to shift that Occurs once on 06/04/2022 from 08:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)   |
| 06/08/2022 | Ann Crippen, Dr. Stanford Grist             | April will come in at 7pm 6/7 and work till 7am 6/8 and Ann will start work at 7am-NB. (Added to shift that Occurs once on 06/08/2022 from 07:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Ann Crippen)   |
| 06/13/2022 | Dr. Stanford Grist, Jessica Triplett        | jessica is double booked - she works with James every other monday - bk. (Added to shift that Occurs once on 06/13/2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett)  |
| 06/20/2022 | Dr. Stanford Grist, Jessica Triplett        | April is aware that Tracy Parson's approved for Ann and her to bring their dog to the clients home. I reminded her that it is okay just for this client. -HP   |
| 06/20/2022 | Dr. Stanford Grist, Jessica Triplett        | Jessica called to report that Dr. Grist was so upset when the men bringing in a new refrigerator and Jessica redirected him outside and Dr. Grist hit her twice once in the arm and once in the Belly. They then called Stacy to see if that would calm him down but Stacy said " Dad well we had to get a new refrigerator since they broke it" This made Dr. Grist even more upset and was asking " Who broke it?!" Stacy then told Jessica " Next time ill make sure to send someone he knows" This made Jessica very uncomfortable since she is there every Friday and every other Monday and Dr. Grist has never been upset with her, Dr. Grist has never hit her like this before. Jessica at this time feels like it would be best for her to come off. LG. (Added to shift that Repeats every 2 weeks on Monday starting on Jun 20, 2022 from 10:00 AM EDT to 08:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Jessica Triplett) |
| 06/22/2022 | Dr. Stanford Grist                          | Call in Potassium and Lasix  |
| 06/22/2022 | Dr. Stanford Grist                          | Today I went to Walgreens and picked up Dr. Grist 2 medications. Then I went to the house and setup his medication boxes for the next month. When I arrived he and Ann were standing outside watching the man bush hog the field. He seemed in good spirits. He was smiling and telling me that he had had lunch with Stacy. Ann also let me know that Stacy had asked her to cover shifts during the 4th of July week because Stacy will be out of town and she knows she will not worry if Ann is there. I will need to call Dr. Wong's office and reorder Potassium and Lasix since the pharmacy only had 19 days worth left on each prescription.  |
| 06/23/2022 | Dr. Stanford Grist                          | Today I called Dr. Wong's office and let them know I needed them to call in a new prescription for Lasix and Potassium to Walgreens Pharmacy on E. North St.   |
| 06/23/2022 | Dr. Stanford Grist, Kenneth "Dan" Robertson | Dan when to go meet Dr. Grist and he was very anxious and does not want to make Dr. Grist feel that way. LG. (Added to shift that Occurs once on 06/23/2022 from 10:00 AM EDT to 01:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Kenneth "Dan" Robertson)   |
| 06/23/2022 | Dr. Stanford Grist, Kenneth "Dan" Robertson | train with Ann. (Added to shift that Occurs once on 06/23/2022 from 10:00 AM EDT to 11:00 AM EDT for Dr. Stanford Grist; assigned to caregiver Kenneth "Dan" Robertson)  |
| 06/24/2022 | Dr. Stanford Grist                          | Daughter will have him during this time. LG (Added to shift that Occurs once on 06/24/2022 from 09:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; no caregiver assigned)  |
| 06/24/2022 | Dr. Stanford Grist, Kenneth "Dan" Robertson | Dan when to go meet Dr. Grist and he was very anxious and does not want to make Dr. Grist feel that way. LG (Added to shift that Occurs once on 06/24/2022 from 09:00 AM EDT to 02:00 PM EDT for Dr. Stanford Grist; assigned to caregiver Kenneth "Dan" Robertson)  |
| 06/28/2022 | Dr. Stanford Grist                          | Dr. Wong called me and asked that I discontinue lasix and potassium. He feels like he no longer needs it. I let Tracy know and I will remove the pills later today.  |

GUARDIAN OATH

having been appointed as Guardian for  
PROTECTED PERSON, understands the following:

1. The Guardian is a fiduciary and is subject to a trustee's standard of care or "prudent person rule." The Guardian shall exercise sound judgment and care that a prudent person acting as a fiduciary would exercise under the circumstances.
2. Guardian must keep suitable records and provide them to Court as specified in the Order. The records must be maintained until three years after the Guardianship is closed. They must be sufficiently detailed so that each issue is documented and can be confirmed.
3. Guardian shall contact the Court immediately upon:
  - a. Resignation of the Guardian;
  - b. Death of Protected Person;
  - c. Changes in Protected Person's or Guardian's address;
  - d. The Guardian's inability to contact or locate the Protected Person;
  - e. The Protected Person's serious illness, hospitalization or need for hospice assistance
4. The Annual Guardian Report must be filed with the Court each year on the anniversary of appointment. The Guardian is required to answer and provide supporting information to all questions in the Annual Report of Guardian. The report shall include a recently taken, current color photograph of the Protected Person.
5. The Court may require the Guardian to file additional reports, records and information, at other times during the year, to supplement the Annual Guardian Report filed with the Court.
6. The Guardian shall maintain regular contact with the Protected Person to ensure the environment, residence or facility is safe. The Guardian shall also ensure the Protected Person is taking medications and is adequately nourished, healthy, comfortable and receiving appropriate recreation, social stimulation and assistance with special needs.
7. The Guardian shall provide the Probate Court his/her current address, email address and telephone number as well as the current address, facility name and contact information, and if applicable, email address and telephone number of the Protected Person. The Guardian shall **promptly** advise the Probate Court of any and all changes in the above referenced contact information.
8. The Guardian has a fiduciary duty to act in the protected person's best interests. The Guardian shall consider safety and comfort when making decisions about the Protected Person. The Guardian shall make reasonable efforts to discuss decisions with the protected person before acting and shall preserve the personal independence, dignity and lifestyle of the Protected Person.

9. The Guardian shall take reasonable care of the protected person's clothing, furniture, vehicles and other personal effects.

10. The Guardian may give consent or approval necessary for the Protected Person to receive medical or other professional care or treatment. This may include major hospital related decisions, regular checkups, psychiatric treatment, dental, drug/alcohol treatment and other health care decisions. The Guardian shall make reasonable efforts to discuss these decisions with the Protected Person and encourage the Protected Person to participate in decisions to the extent able.

11. The Guardian shall have full access to all of the Protected Person's individually identifiable health information and medical records which shall be released without restriction, including but not limited to, (i) relating to the diagnosis and treatment of mental illness, drug or alcohol abuse, dependence and/or treatment, other health care, and related insurance and financial records and information associated with any past, present or future physical or mental health condition and (ii) any written opinion relating to the Protected Person's health that the Guardian may have requested. Without limiting the generality of the foregoing, this release authority applies to all health information and medical records governed by the Health Insurance Portability and Accountability Act of 1996 (HIPAA), 42 USC §1320d, 45 CFR §§160-164.

12. In some cases, the Court may have ordered that the Guardian have limited financial power permitted under Section 62-5-309(A)(6)(b) of the South Carolina Code of Laws. Guardians who have Court ordered limited financial power shall apply money and property for the Protected Person's support, care and education. The Guardian shall itemize all expenses and provide the Court receipts and other documentation to verify all financial matters and expenditures handled on behalf of the Protected Person. If applicable, the Guardian must show, to the Court's satisfaction, any assets that are received by the estate, where such property came from, what property left the estate or was transferred. The Annual Guardian Report must be substantiated by receipts, and any other proof the Court may request.

13. Co-Guardians appointed by the Court shall keep one another informed of the Protected Person's medical condition, medications, medical treatment, hospitalization, operations, procedures and physicians' name(s) and contact information.

**ACKNOWLEDGEMENT**

I fully understand the duties and responsibilities described above. I agree to comply with each and every provision of the Oath. If I fail to comply with any of the terms of my Oath, I understand that I will be summoned to Court for a hearing. If, after hearing testimony and receiving evidence, the Judge finds that I have been derelict in my duties, the Judge may remove me as Guardian with sanctions. If the violation was willful, the sanction(s) could be a fine, incarceration or both.

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Signature\_\_\_\_\_

\_\_\_\_\_  
Notary Public of South Carolina

My Commission expires:\_\_\_\_\_



## Dr. Stanford Grist Assessments & Care Plan

**Address:**

[Redacted Address]

**Contact Info:**

[Redacted Contact Info]

Emergency Contact: Stacey Grist (Daughter) [Redacted]

Medical Professional: Amy Kirklanp, PT [Redacted]

Emergency Contact: Tracy Parsons (Geriatric Care Manager (GCM) ) ([Redacted])

## Care Needs:

Initial Contact: 07/17/2020

Start Date: 08/28/2020

Prognosis: Fair

Care Goals:

Name: Dr. Stanford Grist

Address: [Redacted]

\*There is a barbed wire fence in front of house and a long gravel driveway. The house is a brown cinder block house on lots of land with tractors in the backyard.

GATE CODE: [Redacted] (The star symbol is on the bottom, first button on the left. It resembles arrows.)

\*\*Grist's Alzheimer's is slowly progressing, and he occasionally runs away when he gets upset or overwhelmed. There is a fence around his property, but in the instance of him running, call the office, do your best to follow him and keep eyesight on his whereabouts. He typically comes back but we need to keep eyes on him at all times.

\*\*Dr. Grist is not to be left alone! He is stumbling more when he walks and is a fall risk. He recently had a fall which was believed to be due to a stroke, so Dr. Grist's abilities are declining. He is becoming more forgetful especially of names. Be reassuring to him!

Level of Care: 2

Contacts: Tracy (geriatric guardian). Tracy is the main contact for Dr. Grist.

Daughter-Stacey

Call the CK office with any issues or questions ([Redacted])

Dr. Stanford Grist is a retired veterinarian that lives in a small cabin on a 400 acre farm. He needs a companion to keep him engaged, active, and safe. He enjoys being outside and working around his farm. His passion is trees, and he enjoys planting. He has three daughters. He has a geriatric guardian, Tracy Parsons.

\*\* VERY IMPORTANT\*\* Marilyn has posted signs saying to call her immediately for any needs. We are going to leave the signs up but please DON'T call her. Call the office if you need anything and we can notify Tracy, the Geriatric Care Manager.

\*\*\*Must stay with Dr. Grist at all times, he is a flight risk.

SOCIAL: He likes to stick around his farm and "work". He also likes to read watch TV. Dr. Grist's ex wife lives next door and sometimes comes over. Please call the office if there are any issues. He enjoys piddling around his farm and being outside as much as possible. Continue to encourage him to remain active and spend time outside. Stay with him outside and make sure he is dressed appropriately.

Proposed Schedule:

Care Coordination Notes:

## Demographics:

Date of Birth: [Redacted]

Age: 74

Height:

Weight:

Marital Status: Divorced

Spouse Name:

Lives With: **Alone**

Religion: ----- Attends Services: **Unknown**

DNR:  Yes  No  Unknown Languages: **English**

Past Profession: **Veterinarian**

## Activities of Daily Living (ADLs)

Activities and associated caregiver tasks

### Ambulation & Transfer: Walking or getting around; getting in and out of bed or chair

|                               |    |                        |    |   |
|-------------------------------|----|------------------------|----|---|
| <b>TASK:</b> Walk with client | -- | All shifts<br>All Days | -- | 2 |
|-------------------------------|----|------------------------|----|---|

### Bathing: Bathing in shower or tub

|                              |    |                        |    |   |
|------------------------------|----|------------------------|----|---|
| <b>TASK:</b> Monitor in bath | -- | All shifts<br>All Days | -- | 2 |
|------------------------------|----|------------------------|----|---|

### Dressing & Grooming: Picking clothes, managing fasteners, combing hair, shaving, toothbrushing

|                                   |    |                        |    |   |
|-----------------------------------|----|------------------------|----|---|
| <b>TASK:</b> Assist with dressing | -- | All shifts<br>All Days | -- | 2 |
|-----------------------------------|----|------------------------|----|---|

### Toileting: Getting on and off toilet, arranging clothes, cleaning self

|                                    |    |                        |    |   |
|------------------------------------|----|------------------------|----|---|
| <b>TASK:</b> Assist with toileting | -- | All shifts<br>All Days | -- | 1 |
|------------------------------------|----|------------------------|----|---|

|                                  |    |                        |    |   |
|----------------------------------|----|------------------------|----|---|
| <b>TASK:</b> Supervise toileting | -- | All shifts<br>All Days | -- | 2 |
|----------------------------------|----|------------------------|----|---|

## Instrumental Activities of Daily Living (IADLs)

Activities and associated caregiver tasks

### Housework: Heavy (scrubbing floors) or light (dusting, doing dishes)

|                                |                                 |                        |    |   |
|--------------------------------|---------------------------------|------------------------|----|---|
| <b>TASK:</b> Clean living area | Complete all housekeeping tasks | All shifts<br>All Days | -- | 2 |
|--------------------------------|---------------------------------|------------------------|----|---|

### Interactive: All Interactive Care

|                                 |   |                        |    |   |
|---------------------------------|---|------------------------|----|---|
| <b>TASK:</b> Engage with Client | Dr Grist has 400 acres and he LOVES to be outside. Accompany him outside to "piddle" around. Take water with you when you leave the house and encourage him to drink plenty!! | All shifts<br>All Days | -- | 2 |
|---------------------------------|---|------------------------|----|---|

### Laundry: Cleaning, ironing, folding, and putting away clothes

|                         |    |                        |    |   |
|-------------------------|----|------------------------|----|---|
| <b>TASK:</b> Do laundry | -- | All shifts<br>All Days | -- | 2 |
|-------------------------|----|------------------------|----|---|

### Medication: Taking medications at correct dose at correct time

|                                  |   |                        |    |   |
|----------------------------------|---|------------------------|----|---|
| <b>TASK:</b> Medication reminder | Make sure he takes his medication in the AM | All shifts<br>All Days | -- | 2 |
|----------------------------------|---|------------------------|----|---|

### Preparing Meals: Opening containers, cooking, and serving

|                           |    |                        |    |   |
|---------------------------|----|------------------------|----|---|
| <b>TASK:</b> Prepare meal | -- | All shifts<br>All Days | -- | 2 |
|---------------------------|----|------------------------|----|---|

## Medical Conditions:

List any chronic or acute conditions as well as recent hospital/skilled nursing stays:

Physician: Daniel Wong, FNP At Galen Healthcare

Living Will? NO

# Dr. Stanford Grist - page 3 of 6

DNR? NO

Preferred Hospital: No preference

\*Has glasses and hearing aids but doesn't wear them. He has recently become much more confused and forgetful. Caregiver will need to prompt him and instruct him to do things.

Hearing:  Good  Poor  Deaf  Hearing Aid

Speech:  Good  Poor  None

Vision:  Good  Poor  Blind  Glasses

Swallowing:  Good  Poor  None

Other:  Smoker  Sensitive to Smell  On Oxygen  Colostomy Bag  Feeding Tube

Functional Limitations:  Amputation  Bowel/Bladder (Incontinence)  Contracture  
 Hearing  Paralysis  Endurance  
 Ambulation  Speech  Legally Blind  
 Dyspnea with Minimal Exertion

## Mental/Behavior Conditions:

Diagnosed Disorders / Medications:

Client has dementia and has a difficult time getting words out. A lot of time he knows what he wants to say but is unable to verbalize it. This is frustrating to him. He is physically fit but his cognition prevents him from completing activities of daily living. He walks independently, toilets independently and needs assistance with grooming and dressing.

Depression  Lethargy  Past/Current Substance Abuse

Can client be left alone? No Wanderer? Yes Dementia: Moderate

|           |  |  |   |
|-----------|--|--|---|
| Symptoms: | <input checked="" type="checkbox"/> Frequent Mood Changes        | <input type="checkbox"/> Hallucinations              | <input checked="" type="checkbox"/> Problem Solving   |
|           | <input checked="" type="checkbox"/> Short Term Memory Loss       | <input checked="" type="checkbox"/> Completing Tasks | <input type="checkbox"/> Sundowning                   |
|           | <input checked="" type="checkbox"/> Spatial/Visual Relationships | <input type="checkbox"/> Misplacing Items            | <input type="checkbox"/> Poor Eating                  |
|           | <input checked="" type="checkbox"/> Speaking/Conversing          | <input checked="" type="checkbox"/> Poor Judgment    | <input checked="" type="checkbox"/> Sleeping Problems |
|           | <input type="checkbox"/> Anxiety                                 | <input checked="" type="checkbox"/> Agitation        | <input type="checkbox"/> Fear                         |
|           | <input type="checkbox"/> Paranoia                                | <input type="checkbox"/> Suspicion                   | <input type="checkbox"/> Aggression                   |
|           | <input checked="" type="checkbox"/> Confusion of Time/Place      | <input type="checkbox"/> Withdrawal                  | <input type="checkbox"/> Depression                   |
|           | <input checked="" type="checkbox"/> Repetition                   | <input checked="" type="checkbox"/> Wandering        | <input type="checkbox"/> Oriented                     |
|           | <input type="checkbox"/> Comatose                                |  |   |

Triggers:

## Allergies:

Allergies: No Known Allergies (NKA)

Notes:

No Known Allergies

## Elimination:

Incontinence:  Urination  Bowels Wears briefs: Accident Protection

Issues:  Constipation  Diarrhea  Urination

Notes:

TOILETING: Client is needing more assistance with toileting. He wears regular underwear but is beginning to wear briefs. He is mostly continent of bowel and bladder but has accidents at times and needs prompting when it comes to toileting. He sometimes needs more step by step prompting with toileting.

**KIKI KARE/COMFORT KEEPERS000054**

**2470**

**Medications and Supplements:**

| MEDICATION / SUPPLEMENT                              | STATUS   | DOSAGE                            | REASON/DESC.                         | TIME                                    | MODIFIED |
|--|----------|-----------------------------------|--------------------------------------|---|----------|
| <b>Senokot</b> 8.6mg<br>tablet; oral                 | Active   | 1 tablet in the evening           | Constipation                         | at bedtime                              | 05/16/22 |
| <b>Beet Juice Powder</b><br>Powder                   | Active   | 1 scoop daily                     |                                      | with breakfast                          | 05/16/22 |
| <b>Tri-B Supplement</b><br>Pill                      | Active   | 1 tablet daily                    |                                      | with breakfast                          | 05/16/22 |
| <b>PQQ Supplement</b> 20mg<br>Pill                   | Active   | 1 capsule daily                   | Energy                               | with breakfast                          | 05/16/22 |
| <b>Terbinafine HCl</b> 250mg<br>tablet; oral         | Active   | 1 tablet daily                    | toe fungus                           | with breakfast                          | 01/26/22 |
| <b>Levothyroxine Sodium</b><br>50mcg<br>tablet; oral | Active   | 1 tablet daily                    | Hypothyroid                          | first thing in the morning              | 01/26/22 |
| <b>Liothyronine Sodium</b><br>10mg<br>tablet; oral   | Active   | 2 tablets in the am and<br>at 2pm | Hypothyroid                          | first thing in the morning,<br>02:00 PM | 01/26/22 |
| <b>Donepezil Hydrochloride</b>                       | Active   | 1 tablet in the evening           | Dementia                             | at bedtime                              | 01/26/22 |
| <b>B-Complex</b>                                     | Active   | 1 tablet daily                    | Anemia                               | with breakfast                          | 01/26/22 |
| <b>Vitamin D3</b> 5000unit<br>tablet; oral           | Active   | 1 tablet daily                    | Immunity                             | with breakfast                          | 01/26/22 |
| <b>Furosemide</b> 20mg<br>tablet; oral               | Inactive | 1 tablet daily                    | Swelling                             | with breakfast                          | 06/28/22 |
| <b>Potassium Chloride</b><br>10meq<br>Pill           | Inactive | 1 tablet daily                    | Low Potassium related to<br>diuretic | with breakfast                          | 06/28/22 |
| <b>5-Hydroxytryptophan</b><br>100mg<br>Capsule       | Inactive | 3 caps at bedtime                 | Insomnia                             | at bedtime                              | 06/28/22 |

Needs medication / supplement reminders? **Yes**

How many times per day? **3**

Who manages medications / supplements? **Kris May (CK Nurse)**

Number of medications / supplements: -----

Is there a separate medication / supplement schedule sheet? **Unknown**

Medications / Supplements set up in pill boxes? **Yes**

How many weeks? -----

Notes:

MEDICATIONS: He takes all his medication in the morning, noon, and evening from medicine organizer on the kitchen counter. His prescription bottles and additional medicine organizers are in a lock box in the kitchen. The key for the lock box is hanging on the cork board beside the dining room table. CK nurse will set up all medications.

**Ambulation:**

Aids:  Cane  Walker  Wheel Chair  Geri-Chair  Scooter

Fall Risk:  Fall Risk  No History  Poor Balance Use of Arms/Hands:  Left  Right

Notes:

AMBULATION: Client has a mostly steady gait. Make sure to stay near him when he is walking. If he wants to walk around the property, make sure he stays within sign and keep an eye on him at all times. \*He is a flight risk due to his cognition/dementia\* He has been more unsteady lately after a fall he had so be sure to stay closeby and assist when needed. Dr. Grist enjoys being outside and working on his

---

## Bathing, Grooming & Dressing:

- Resists Bathing    Uses Shower Bench
- Method:  Shower    Bath    Sponge\_bath   Frequency:
- Hygiene:  Dental/Dentures Care    Skin Care    Other
- Dressing: Heavy Assistance

Notes:

BATHING: Client can mostly shower independently but stay close by to help if needed. It is ok to stay outside the bathroom to give him his privacy. He at times resists taking showers and will say "I'll shower when I can smell myself!" Prompt him by letting him gently know you can smell him as this often prompts him that it is time to shower.

DRESSING: Client needs assistance with getting dressed. Help him put on compression socks and dress his upper and lower body. He is forgetting how to do more technical things such as getting dressed and has days where he needs more help than others.

---

## Meals:

- Assistance:  Cooking    Preparation    Feeding   Appetite: Good
- Diet: -----   Special Diet:

Shopping By: Instacart

- Times:  Breakfast    Lunch    Dinner    Snacks
- Other:  Swallowing Issues    Encourage Liquids

Favorite Foods:   Breakfast:  
Lunch:  
Snack:  
Dinner:

Notes:

MEAL PREP: Make a grocery list in the home, there is an ongoing list in the home and send to the office. Dr. Grist uses instacart grocery delivery services through the office. We are responsible for preparing all meals for him. He likes bacon sandwiches, grilled cheese sandwiches, casseroles, chicken pot pies, oatmeal, cereal, etc. Encourage him to eat and drink. He has been becoming more picky recently but always encourage a meal and place one for him to eat even if he says he is not hungry. Really enjoys hot cocoa and ice cream.

---

## Driving:

- Vehicle:  Client Drives    Needs Caregiver to Drive Car
- Other:  Errands:    Doctor's Appointment(s):

Notes:

TRANSPORTATION: Drive caregiver's vehicle for any transportation needs. We will transport him to all appointments and errands. Often has lunches with his daughter which are pre-planned and we will make you aware of those appointments beforehand. Report your mileage. Dr. Grist also has a golf cart on his property, caregiver needs to drive it but feel free to use this to get him out and about on his property.

---

## Sleep Patterns:

- Goes To Bed:   Wakes Up:
- Sleeps through night    Frequently awakens    Gets up for toileting    Difficulty returning to sleep

# Dr. Stanford Grist - page 6 of 6

Needs assistance at night from caregiver?  Naps during day:      Time:      Duration:

Notes:

Dr. Grist has been getting up more throughout the night and having some trouble returning to bed.

---

## Daily Routine:

### Activities Permitted

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Complete Bedrest    | <input type="checkbox"/> Bedrest BRP          | <input type="checkbox"/> Up as Tolerated        |
| <input type="checkbox"/> Transfer Bed/Chair  | <input type="checkbox"/> Exercises Prescribed | <input type="checkbox"/> Partial Weight Bearing |
| <input type="checkbox"/> Independent at Home | <input type="checkbox"/> Crutches             | <input type="checkbox"/> Cane                   |
| <input type="checkbox"/> Wheelchair          | <input type="checkbox"/> Walker               | <input type="checkbox"/> No Restrictions        |

### Daily Routine

Morning:

Afternoon:

Evening:

\*OVERNIGHT: Client has an 8pm sleep medication he will need to take, you must stay awake the full shift. Make sure to always lock the door and set the house alarms at night.\*

---

### Activities

Activities at Home: *(e.g. Reading, Board Games, Hobbies, Music):*

LIGHT HOUSEKEEPING: Assist with all housekeeping as needed. Wash sheets, towels and laundry as needed. Keep home tidy.

Activities Away from Home: *(Parks, Gardens, Outings, Lunches, etc.):*

Favorite Restaurants/Shops:

Family/Friends/Neighbors:

Powered By ClearCare Inc.



# Client Care Agreement

Kiki's Kare LLC dba Comfort Keepers  
 Spartanburg, SC 791 E Main Street Suite 5, 29302 P: 864-673-2353  
 Greenville, SC 1200 Haywood Road, 29615 P: 864-266-6993  
 Tryon, NC 2186 Lynn Road STE C, 28722 P: 828-436-1925

No: \_\_\_\_\_

Office hours: 8:45 a.m. - 5:00 p.m. Monday – Friday  
 For after hours and holidays, call the number to the right to reach our on-call services.

|   |            |  |                  |
|---|------------|--|------------------|
| <b>CLIENT INFORMATION:</b> Client is <input type="checkbox"/> Payor <input type="checkbox"/> Survey Contact   |            |  |                  |
| Name (Last, First, MI) Grist, Stanford  |            | Phone Number                             |                  |
| Address 900 Old Hwy 25  |            | ALT Phone Number                         |                  |
| City Travelers Rest   | State SC   | Zip Code 29690                           | SS#              |
| Email Address   |            | Date of Birth 4/12/48                    |                  |
| <b>CLIENT CONTACT 1:</b> Client Contact 1 is <input type="checkbox"/> Payor <input type="checkbox"/> Survey Contact <input checked="" type="checkbox"/> Emergency Contact <input type="checkbox"/> Back Up Provider   |            |  |                  |
| Name (Last, First, MI) Grist, Stacey  |            | Phone Number 404-849-1129                |                  |
| Address 707 east stone ave  |            | ALT Phone Number                         |                  |
| City greenville   | State sc   | Zip Code 29601                           | SS#              |
| Email Address Griststacey@gmail.com   |            | Relationship daughter                    |                  |
| <b>CLIENT CONTACT 2:</b> Client Contact 2 is <input type="checkbox"/> Payor <input type="checkbox"/> Survey Contact <input type="checkbox"/> Emergency Contact <input type="checkbox"/> Back Up Provider  |            |  |                  |
| Name (Last, First, MI) Charlotte Grist  |            | Phone Number 206-920-9833                |                  |
| Address   |            | ALT Phone Number                         |                  |
| City  | State      | Zip Code                                 | SS#              |
| Email Address   |            | Relationship daughter                    |                  |
| <p><b>Consent for Service:</b> Comfort Keepers® is authorized to provide services according to the Plan of Care and each subsequent Plan of Care agreed to, and will make reasonable efforts to do so. Client understands that the Plan of Care may change based on Client requests and service needs. Client agrees to pay Comfort Keepers® for all services rendered at the rate of \$ 23.00/hour per hour / day / week / month or as outlined on the attached Rate Sheet. Comfort Keepers® may change the service rates from time to time upon written notice to Payor. Initial <u>SG</u></p>  |            |  |                  |
| <p>Comfort Keepers accepts payments via Credit Card, Debit Card, and Electronic Funds Transfer (EFT). Comfort Keepers may require an advanced payment for services. By signing the Client Care Agreement, client and payor agree that the payment information provided will be charged for services on a <u>biweekly</u> basis through a third party payment processor. <u>SG</u> Initial</p>   |            |  |                  |
| <p>I understand Comfort Keepers may utilize e-visit verification through telephony time tracking services or location services via a mobile app for tracking time of Caregivers and other Comfort Keepers employees at the client's location. I agree that the arrival and departure times recorded using the above-mentioned systems is the official record of the hours of services provided to me and is the basis for the charges I must pay for services. I authorize Comfort Keepers to utilize the telephony records or mobile app records, which may or may not include a voice statement, as my electronic signature for the purposes of verifying care logs. If needed and confirmed by Client or authorized party, I authorize Comfort Keepers administrative staff to upload my electronic signature for the purpose of verifying care logs when signing at the time of services is not possible. I authorize and acknowledge my electronic signature is binding and is equal to my physical signature. <u>SG</u> Initial</p> |            |  |                  |
| <p>Advance Directive for Health Care: I <input type="checkbox"/> DO <input type="checkbox"/> DO NOT have an Advance Directive. POA _____<br/>                 Do NOT Resuscitate (DNR) orders are located: _____</p>  |            |  |                  |
| <p>I acknowledge and understand all information that was provided and explained to me and agree to the terms and conditions above, on the reverse side of this agreement and on any attachments. I authorize release of my information for coordination of health and support services during time of services with Comfort Keepers. I have received information about how to use the Comfort Keepers® complaint process and the NOTICE OF PRIVACY PRACTICES as required by the Health Insurance Portability and Accountability Act of 1996 (HIPAA). If signing as a backup service provider, I acknowledge that in the event of an emergency/disaster I am responsible for the client. I acknowledge I have received, understand and agree to the following paperwork: Client Rights and Responsibilities; HIPAA/Privacy Practices; Information on Advanced Directives, Release of Information Authorization, and the following:</p>   |            |  |                  |
| Signed <u>[Signature]</u>   | 8/27/2020  | Signed <u>Christie Snyder</u>            | 8/27/2020   4:20 |
| Client or Authorized Rep Signature  | Date       | Comfort Keepers Representative Signature | Date             |
| Signed _____  | Date _____ | Signed _____                             | Date _____       |
| Payor Signature   | Date       | Back Up Service Provider Signature       | Date             |

CCF710A-11 07/18

White – Office Copy

Yellow – CKFI

Pink – Client Copy



1. The Client and the Payor agree to the terms set forth in this Agreement. References in this Agreement to services provided to "the Client" mean services provided to the individual listed on the reverse side of this page as the Client; otherwise, references in this Agreement to "the Client" shall mean, jointly and severally the Client and the Payor, both as designated on the reverse side of this page.
2. The Client acknowledges that the Comfort Keepers® office listed on the reverse side of this page (referred to as "Comfort Keepers" in this Agreement) is an independently owned and operated franchised business.
3. Either the Client or Comfort Keepers may cancel this Agreement at any time by providing the other party at least two (2) weeks' prior written notice of the cancellation; but Comfort Keepers may cancel this Agreement without prior notice under the conditions set forth in the Client Conduct, Rights, and Responsibilities form provided to Client. If the Client does not provide Comfort Keepers at least two (2) weeks' prior written notice of the cancellation, Comfort Keepers has the right to retain all payments previously made by the Client, as partial compensation to Comfort Keepers for its losses and damages, including, but not limited to, forgone business opportunities and expenses that Comfort Keepers had incurred in preparing for the services it was to provide to the Client.
4. If the Client fails to pay timely Comfort Keepers in full for the services that Comfort Keepers provided to the Client, the Client will pay Comfort Keepers, in addition to the amounts owed, all reasonable costs and expenses that Comfort Keepers incurs to collect past due amounts, including, but not limited to, court costs, collection fees, attorneys' fees, and interest at the maximum rate permitted by law. The Client further agrees that if the Client fails to pay timely Comfort Keepers in full for the services that Comfort Keepers provided to the Client, Comfort Keepers may refuse to provide any further services to the Client until the past due amounts are paid in full.
5. The Client acknowledges that Comfort Keepers employees who are not providing nursing services under the Plan of Care are not qualified or authorized to provide any medical services to the Client. The Client further acknowledges that if a medical emergency arises while any Comfort Keepers employee is providing services to the Client or is otherwise present, that employee will not provide any medical services to the Client, but the employee may call 911 for emergency assistance. The Client agrees to hold harmless Comfort Keepers and its employee for any emergency medical or other care that the employee may provide to the Client, including care provided based on instructions given by any 911 service provider. Unless Comfort Keepers is expressly providing private duty nursing services, Comfort Keepers will not administer or provide any medication and will be limited to solely providing verbal reminders to take medication and assistance opening containers.
6. The Client agrees not to hold Comfort Keepers or its employees responsible for any physical loss or damage to, or loss of use of, any of the Client's property while outside the care or control of a Comfort Keepers employee. The Client will not hold Comfort Keepers or its employees responsible for any bodily injury to the Client if the Client fails to follow the employee's instructions and/or the injury occurs while the Client is not in the presence of the employee. The Client further agrees not to hold Comfort Keepers or its employees responsible for any bodily injury, property damage, fire, theft, collision or public liability claims arising out of the operation of a motor vehicle that is not being operated or controlled by a Comfort Keepers employee.
7. If the Client needs to make any changes to the Plan of Care or Payor information, the Client will notify the Comfort Keepers office directly, as soon as the Client becomes aware of the changes. Requests for additional services or hours will be accommodated based on caregiver availability. If the Client requests a reduction of services or hours after a caregiver receives the schedule, the Client will pay for the hours as scheduled.
8. The Client will not, directly or indirectly, or through family or other persons, obtain or seek to obtain the personal phone number or address of any Comfort Keepers employee. Furthermore, the Client will not, directly or indirectly, or through family or other persons, contact or discuss with a Comfort Keepers employee or any of the employee's family members any matters related to this Agreement, including, but not limited to, the Client's care requirements, schedule arrangements, payments or invoices or employee compensation, without first obtaining written permission from Comfort Keepers.
9. The Client acknowledges that Comfort Keepers has a substantial investment in recruiting, hiring, training and retaining its employees in order to develop and maintain the unique skill set required for the performance of their job duties. The Client agrees that during the term of this Agreement and for a period of one (1) year from the last day that the Client stops utilizing Comfort Keepers' services, the Client will not, directly or indirectly through family, or through any other person, company or agency, utilize or hire any Comfort Keepers employee or former Comfort Keeper employee. In addition, for the same period of time, the Client agrees not to, directly or indirectly through family or any other person, induce any Comfort Keepers employee to leave his/her employment with Comfort Keepers. The Client acknowledges that Comfort Keepers employees who provide services directly to clients have entered into non-competition agreements (not applicable in all states) with Comfort Keepers. If the Client, in violation of this Agreement, directly or indirectly through family, or through any other person, company or agency, utilizes or hires any Comfort Keepers employee, then Comfort Keepers may seek its losses and damages from the Client in a court of competent jurisdiction. Comfort Keepers may also seek such losses and damages if the Client, directly or indirectly through family or any other person, company, or agency, induces any Comfort Keepers employee to leave his/her employment with Comfort Keepers.
10. The Client and Comfort Keepers acknowledge that it would be difficult to estimate Comfort Keepers' actual losses and damages if the Client breaches the obligations set forth in the preceding two (2) paragraphs. Therefore, if the Client breaches any of those obligations, THE CLIENT WILL PAY TO COMFORT KEEPERS \$12,500 AS LIQUIDATED DAMAGES FOR EACH EMPLOYEE OR FORMER EMPLOYEE THE CLIENT UTILIZES, HIRES, OR INDUCES TO LEAVE HIS/HER EMPLOYMENT, PLUS ALL REASONABLE COSTS THAT COMFORT KEEPERS INCURS IN COLLECTING SUCH AMOUNT, INCLUDING, BUT NOT LIMITED TO ITS COLLECTION FEES AND LEGAL FEES (INCLUDING ATTORNEY FEES). The Client and Comfort Keepers agree that this amount represents a reasonable amount and the parties' best estimate of Comfort Keepers' expected actual losses and damages, including, but not limited to, the cost that Comfort Keepers expended in recruiting, hiring, training and retaining the employee or the employee's replacement, as well as forgone business opportunities and other incidental and consequential damages. The Client acknowledges that this amount is not a penalty. THE CLIENT AUTHORIZES COMFORT KEEPERS TO CHARGE THE CLIENT'S CREDIT CARD FOR THESE LIQUIDATED DAMAGES, NOTWITHSTANDING ANY OTHER NOTICES OR OTHER DIRECTIONS THAT THE CLIENT MAY HAVE GIVEN COMFORT KEEPERS. This paragraph, the preceding two (2) paragraphs, and the credit card authorization on the other side of this Agreement (for purposes of this provision only), survive the termination of this Agreement.
11. The Client will not entrust a Comfort Keepers employee with unattended premises or any part thereof. Additionally, the Client will secure all valuables, including, but not limited to, cash and negotiable instruments, and the Client will not entrust a Comfort Keepers employee with the same, without first obtaining Comfort Keepers' written permission, and then only when the Comfort Keepers employee's specific duties necessitate such activities.
12. The Client agrees that any claims made under Comfort Keepers' fidelity bond or crime insurance must be made in writing by the Client within ten (10) days of the occurrence.
13. This Agreement is severable. If a court declares any provision of this Agreement void or invalid, all other provisions of this Agreement remain binding and enforceable.
14. This Agreement and the obligations and rights of the parties set forth in the Agreement cannot be assigned without the written consent of the other party. This Agreement will be binding upon and inure to benefit of Client and the Client's heirs and assigns and Comfort Keepers and its successors and assigns.
15. No waiver of a default by either party will operate as a waiver of any future defaults, whether or not of a like nature.
16. All provisions of this Agreement that, by their terms or by reasonable implication, are intended to survive this Agreement and shall survive termination of this Agreement.
17. Any dispute between the parties or any claims arising from or in connection with this Agreement shall be governed by and construed in accordance with the laws of the state where Comfort Keepers is located and shall be brought in the state or federal judicial district where Comfort Keepers is located.
18. This Agreement, its attachments, and the Plan of Care are the complete understanding of the parties and no other promise or understanding is of any effect. No change to this Agreement may be made informally or orally and all changes to this Agreement except for changes to service rates, must be made in a writing signed by the parties. Amended or new Plans of Care become part of this Agreement.
19. The Client acknowledges that as of the time this Agreement was entered into, there existed several other in-home care providers from which Client could obtain services of the kind set forth in this Agreement. The Client acknowledges they had the right to have a lawyer review this Agreement prior to signing.

Client or Authorized Signature: \_\_\_\_\_

Date: 8/27/2020



## Pricing & Invoicing Policy

### Caregiving

|  |                  |
|--|------------------|
| Hourly Preferred Rate*(3 Hour Minimum) ----- | \$23.00 per hour |
| Hourly Rate (Less Than 3 Hours) -----        | \$45.00 per hour |
| Hourly Rate (Couples*) -----                 | \$36.00 per hour |
| Weekend Only Rate* (3 Hour Min) -----        | \$26.00 per hour |

\*Hourly preferred rate applies to clients who agree to ACH (EFT Payments). If not paying via ACH the hourly rate will be \$24.00 per hour. Paying via check will require a \$1,000.00 deposit.

\*Couples Hourly Rate applies when two members of a household require hands-on personal care

\*Weekend Only Rate applies when services are used only between the hours of Saturday 12:00a – Sunday 11:59pm

### Changing Care Needs

- As care needs expand or decrease, services such as personal care, nursing services, transportation in a Comfort Keeper's car, and the like, will be charged per the included fee schedule. We make every effort to maintain constant communication with our clients, families and caregivers to keep everyone updated on care changes. Clients will be informed of any fee changes in advance.

Mileage for Errands & Transportation to Appointments in CLIENT's Vehicle ----- \$ No Charge

- Client must maintain automobile insurance which allows other persons to drive their vehicle.

Mileage for Errands & Transportation to Appointments in Comfort Keepers Vehicle ----- \$.65 per mile

- Rate will vary with IRS mileage reimbursement rate and includes a minimal surcharge to cover agency costs.

Rates Include the Following for All Our Services As Well As Office Staff ----- \$ No Charge

- On-going supervision and coordination of care.
- Continuing education and case-specific training of caregivers to meet client needs
- Comfort Keepers is fully licensed by DHEC.
- Bonding and proper liability insurance for your protection.
- Comprehensive background investigation of criminal, driving and employment records and reference checks.
- Workers' Compensation Insurance so any injury that might occur in a client's home will not place the client in financial jeopardy.
- Payment of all payroll taxes such as FICA, Medicare, Income Tax, Unemployment Taxes and the like will be paid to all applicable Federal, State and Local taxing authorities so clients will not have to bear this legal responsibility.

I have reviewed and accept both pages of the Comfort Keepers Pricing and Invoicing Policy.

Signature: \_\_\_\_\_ Date: 8/27/2020 | 3:38 PM CDT

STATE OF SOUTH CAROLINA )  
 )  
COUNTY OF GREENVILLE )

IN THE PROBATE COURT  
2020-GC-23-00088 and  
2020-GC-23-00133

**FILED**

**AUG 25 2022**

In the Matters of: )  
Stanford W. Grist )  
 )

**AFFIDAVIT OF**  
**JENNIFER L. BROWNING**

**GREENVILLE COUNTY**  
**PROBATE COURT**

Personally appeared before me, **JENNIFER L. BROWNING, GUARDIAN AD LITEM FOR ALLEGED INCAPACITATED INDIVIDUAL**, who being first duly sworn, deposes and states as follows:

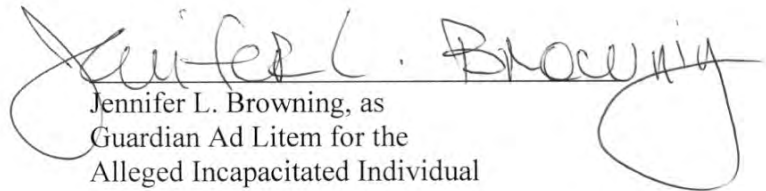
I am currently serving as the Guardian Ad Litem for Stanford W. Grist, the alleged incapacitated individual, in the above-referenced Guardianship action and Conservatorship action. I have conducted a thorough and complete investigation in these matters. However, I have been named as a Defendant in an action filed in the Greenville County Court of Common Pleas entitled Stacey Grist et. al. vs. Priscilla Mickie Grist, et. al. 2022CP2304055 (Hereinafter “Common Pleas case”). The Common Pleas case calls into question my actions as the Guardian Ad Litem for the alleged incapacitated individual in the current cases before the Greenville County Probate Court. Being named as a Defendant in the Common Pleas case will make it difficult, if not impossible, for me to fulfill my responsibilities and duties in these present actions and comply with South Carolina Code §62-5-106 (A)(4), because there may be times when protecting my self interest in the Common Pleas action may interfere with my conducting a full and open investigation in the present matters. Therefore, I respectfully request that I be relieved as the Guardian Ad Litem for the alleged incapacitated individual in both the Guardianship action and Conservatorship action before the Greenville County Probate Court.

**GUARDIAN AD LITEM FEES AND COSTS**

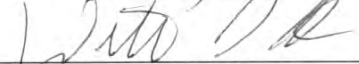
I respectfully request that the Court require my fees and costs as Guardian Ad Litem for the alleged incapacitated individual, in the Guardianship action and the Conservatorship action, be immediately paid from the assets of the alleged incapacitated individual.

**ATTORNEY'S FEES AND COSTS**

I have had to retain an attorney to respond to a subpoena in the present matters and file the present motion. I respectfully request the Court require my attorney fees and costs as Guardian Ad Litem for the alleged incapacitated individual, in the Guardianship action and the Conservatorship action, be immediately paid from the assets of the alleged incapacitated individual.

  
Jennifer L. Browning, as  
Guardian Ad Litem for the  
Alleged Incapacitated Individual

SWORN to before me this the  
25 day of August, 2022

  
Notary Public for South Carolina  
My Commission Expires: 10/26/26