

WEBINAR COMPANION HANDOUT

20 Ways to Use Gemini Notebook *in your aging in place practice*

Ten ways to run your business better. Ten ways to serve your clients and their families better. Practical, no fluff, and built for people who already have too much to do.

PRESENTED BY

Esther Kane

CAPS, C.D.S. | Occupational Therapist (Ret.)
SeniorSafetyAdvice.com • The Aging in Place Hub

Keep this handout. Everything from the session is in here.

You already have the expertise. This is about the hours.

Gemini Notebook is not a chatbot that makes things up. It is a research tool you point at *your own documents*. You upload the sources. It only answers from those sources, and it cites the page it pulled the answer from. That distinction is everything for people like us, because we work in a world of waiver manuals, denial letters, spec sheets, and discharge packets where a wrong answer has consequences.

The five features referenced throughout this handout

Audio Overview — turns your sources into a conversational audio summary people can listen to on a commute.

Video Overview — a short narrated video version of the same thing. Good for people who will not read.

Data Table — pulls scattered documents into one comparison grid with the columns you specify.

Quizzes & Flashcards — auto-generated study material from whatever you uploaded.

Configure Chat — standing instructions that control tone, format, and voice for every answer the notebook gives you.

One rule before you start. Strip personal identifiers out of anything you upload for your own business use — no names, addresses, diagnoses, or phone numbers. Assign each client a number and reference them that way. There is a full privacy checklist on the last page.

HAVE THESE OPEN DURING THE SESSION

Follow along instead of taking notes.

- 1 A Google account you are signed into.** The core features are free. One item in this handout is flagged where a paid plan is required.
- 2 Two or three real documents from your own practice.** A page of your state's waiver manual, a contractor quote, an equipment manual. Anything you have actually had to dig through.
- 3 Your phone's voice recorder app.** We will use it in Part One, #2.
- 4 Ten samples of your own writing.** Blog posts, client emails, report narratives. This is what makes the output sound like you rather than like a robot.

Ten Ways to Use Gemini Notebook in Your Business

Fewer hours on research, quoting, onboarding, and marketing.

1

Stop guessing at code and funding rules

Build one notebook. Load it once.

- CAPS materials and ADA / ANSI reference documents
- Your state's Medicaid HCBS waiver manual
- VA HISA grant and Aid and Attendance guidance
- Your local permitting requirements
- Your Area Agency on Aging program list

Then ask: *"Will any program pay for a walk-in shower for a veteran in my county, and what is the documentation requirement?"*

Why it matters. This is the notebook I would build first if I were you. It takes an afternoon once, and then it answers questions for you for two years. And because every answer cites the page, you can forward the actual source to the family instead of saying "I think it's covered."

2

Talk your assessment, do not type it

- Walk the home and talk into your phone's voice recorder
- Upload the audio file as a source
- Ask for your standard report format

A few minutes of talking instead of forty minutes of typing. You can still edit it afterward.

Careful here. Do not speak any specific personal information out loud — no name, address, diagnosis, or phone number. Give each client a number and use that to reference them and their data.

3

Three quotes in, one table out

Upload the contractor PDFs. Generate a Data Table. Send it to the family.

Why it matters. Families cannot compare bids that are formatted differently. This makes you look organized and it makes the decision faster, which means the job closes faster.

4

Become the expert on any category in one evening

- Upload spec sheets for every stair lift, shower chair, or smart sensor you are considering
- Generate a Data Table
- That same table becomes a client handout, a blog post, and a lead magnet

Why it matters. One evening of work turns into three assets. This is how a small practice competes on knowledge instead of on price.

5

Onboarding without buying training software

- Upload your SOPs, safety protocols, and documentation standards
- Generate quizzes and flashcards
- Share the notebook link with your new tech or aide

You are not going to build a training course. You were never going to. But you can drop your existing paperwork into a notebook in ten minutes, and now your new hire has something to study.

Careful here. Again — remove personal information and use a client number instead.

6

A four-minute video that explains what you do

Build a notebook with your service description and two case examples. Generate a Video Overview. Email it to discharge planners, case managers, and elder law attorneys.

Why it matters. Discharge planners are drowning. Nobody is reading your brochure. But they will watch four minutes on their phone while they eat lunch.

7

One assessment becomes six pieces of content

A single assessment can be recreated as a blog draft, an infographic, an audio file like a podcast, and a slide deck — all from the same existing content you provide the notebook with.

8

Find out what actually closes your deals

Upload your past proposals, follow-up emails, and notes from calls that went nowhere.

Ask: *"What are the five objections that come up most often, and which of my responses were followed by a signed contract?"*

Why it matters. Your own sales history is sitting in your email doing nothing. This turns it into a playbook.

9

Answer the same RFP questions faster every time

Load the RFP, your capability statement, past winning responses, and your insurance and licensing documents.

Why it matters. If you bid on municipal or nonprofit work, you know the questions repeat. Stop rewriting them.

Make it sound like you, not like a robot

Upload 10 pieces of your own writing. Add a Configure Chat instruction: *"Write in the voice of these samples. Short sentences. No jargon."*

Why it matters. The number one complaint about AI writing is that it sounds like AI. This is the fix, and it takes fifteen minutes.

Ten Ways to Use Gemini Notebook for Your Clients

Better comprehension, fewer repeat phone calls, and families who actually understand the plan.

1

For the adult child who lives 2,000 miles away

After the assessment, build a notebook with your report, the product links, and the estimate. Generate an **Audio Overview**. Send it to the adult child.

Why it matters. She listens on her commute. She calls you back informed instead of suspicious.

2

Fourteen pages of hospital paperwork, translated

Upload the whole packet. Ask for a one-page plain-English summary and a list of every appointment and deadline it contains. Then generate an Audio Overview so the spouse who does not read well can hear it.

Why it matters. Nobody reads that packet. Nobody. It goes on the counter and stays there. This is a genuine safety intervention, not a convenience.

3

One notebook the whole family can ask questions of

Load the care plan, medication list, provider contacts, insurance cards, and equipment manuals. Then share the link with all four siblings.

Any of them can ask: *"When is the cardiology follow-up?"* or *"What is the pharmacy phone number?"*

Why it matters. In a shared notebook, each person's chat history is private to them. So the son who is embarrassed to ask a basic question can ask it, and nobody sees.

4

"The bed alarm keeps beeping and I don't know why"

When families ask you questions about equipment, help them by uploading every manual: hospital bed, transport chair, shower chair, lift, monitor.

The family asks in plain English and gets the answer — without hunting through a 60-page PDF at 11pm.

Why it matters. This gives you time back, and it makes you look like a genius.

5

Train the daughter who just became a caregiver on Tuesday

Upload the discharge instructions and the therapist's technique handout. Generate **flashcards** and a **quiz** on her phone using her free Gemini Notebook app.

Why it matters. She is terrified. She has no training. She has a piece of paper she does not understand. Give her something she can practice with while she waits in the pharmacy line.

6

Same content, every language the family speaks

Audio and Video Overviews support 80+ languages. Generate the family briefing in English for the adult children **and** in Spanish for Mrs. Ruiz herself.

Why it matters. Think about what that does for informed consent. She is not being talked around anymore. She is hearing the plan in her own language, in her own kitchen, as many times as she wants.

7

For clients with mild cognitive impairment

Generate a **Video Overview** of the modification plan. They can rewatch it as many times as they need without feeling embarrassed about asking you again.

Why it matters. Repetition without shame. That is the clinical value here, and it is real.

8

Downsizing, sorting, and choosing

Upload the inventory list or the options being considered. Generate a Data Table with the criteria that matter to the family: cost, effort, timeline, emotional weight.

Why it matters. Families get paralyzed by too many choices. A table on one page can help remove that paralysis.

9

The one that makes people cry **PAID PLAN**

Record interviews with the older adult. Upload the audio, plus scanned letters and photo captions. Generate an **Audio Overview** about their life.

For senior move managers and downsizing professionals especially. This one requires the paid version of Gemini Notebook — but it is something the grandchildren will keep forever. Get permission first, obviously.

Also worth knowing. Outside of Gemini Notebook, consider **StoriedLife.ai** (<https://storiedlife.ai>) — a great service and a great way to preserve memories.

10

"What will actually pay for this?"

Upload the client's plan documents, the denial letter if there is one, and the relevant program rules. Ask what the coverage criteria are and where the gaps are.

Say this out loud to the family. This tells you what the documents say. It does not give legal or insurance advice — and neither do you. It just means you walk into that conversation having actually read all 40 pages.

The privacy rules, in one place

Non-negotiables

- **Strip identifiers before uploading.** No names, addresses, diagnoses, phone numbers, or account numbers in anything you load for business use.
- **Use a client number system.** Assign each client a number and reference them that way — in your uploads, in your voice memos, and in your questions.
- **Watch what you say into the recorder.** A voice memo is a document. Everything above applies to it.
- **Get written permission for anything personal.** Especially life-story recordings, family photos, and letters.
- **Know your lane.** The notebook tells you what the documents say. It does not give legal, medical, or insurance advice — and neither do you.

YOUR FIRST WEEK

Do not try all twenty. Do these four.

- 1 **Build the funding and code notebook.** Part One, #1. One afternoon. It will pay you back for the next two years.
- 2 **Set up your voice instruction.** Part One, #10. Upload 10 samples of your own writing and configure the chat. Fifteen minutes.
- 3 **Run one assessment by voice.** Part One, #2. Pick a low-stakes visit and test the workflow before you rely on it.
- 4 **Send one Audio Overview to a long-distance family member.** Part Two, #1. Watch what it does to the next phone call.

The point of all of this

None of these tools make you a better clinician. Your **hands-on experience in people's homes** is the thing families are paying for, and no notebook replaces it.

What these do is buy back the hours you currently lose to paperwork, PDF hunting, and explaining the same thing four times to four siblings — so you can spend those hours in front of the people who need you.

Esther Kane, CAPS, C.D.S. | Occupational Therapist (Retired)

SeniorSafetyAdvice.com • The Aging in Place Hub • TheStoicCaregiver.com

Questions after the session? Bring them to me — I would rather answer them than have you guess.