Operations update (facts)

> **Stage 4 evidence**
> Open only after your initial recommendation (Stage 3) is complete.

To: Fatima Al-Sayed / GRC **From:** Chris Okada, Member Operations, with Elena Voss **Date:** 2027-09-28

What changed

Member Services now uses Pallet Desk **classifications to automatically route a subset of messages**. For those categories, **no human reviews the classification before routing**.

Draft replies still require human approval before anything is sent to a member.

Same Pallet tenant. Same CedarLM. Same documented data types as far as we know.

Operating texture

- Routine **administrative** categories are auto-routed.
- Some **care-navigation** and **billing** messages were **misclassified** into admin and followed that route.
- One **urgent-looking** message was delayed and caught later.
- **No confirmed patient harm.**
- Staff say auto-routing is necessary to maintain service levels.
- Elena wants to **expand** automatic routing.

What this note does not decide

It does not assign an impact class. It does not name a required recommendation. It does not say Pallet is unsafe. It does not say a breach occurred.