

Checklist for Disclosure Team Discussion

This checklist may be useful for identifying tasks to be completed or delegated during a meeting of the disclosure team prior to speaking with the patient and his or her support person(s).

Support Person

Information about an adverse event resulting in harm will be given to a patient's identified support person(s) in appropriate circumstances, taking into account the patient's wishes, confidentiality and privacy requirements, and the organization's internal policies. The support person(s) may be any individual the patient identifies as the nominated recipient of information about his/her care and may include family, a friend, a partner or those caring for the patient.

In cases of a dispute between family and partners or friends about who should receive information, the patient's expressed wishes are paramount.

	Yes	No
All relevant health care professionals involved in the adverse event have been notified/consulted.		
Establish and agree upon known facts:		
<ul style="list-style-type: none"> • Don't include speculation, opinion or blame 		
Identify person(s) to take responsibility for the initial disclosure conversation with the patient:		
<ul style="list-style-type: none"> • Known to the patient • Familiar with the incident and care of the patient • Good interpersonal and communication skills • Willing to maintain a relationship with the patient • Received disclosure training 		
Name(s):		
Support person(s) (e.g., family member) for patient identified and available. Name(s): Relationship to patient:		
Identify and offer support for the disclosing health professional.		
Consider appropriate timing of the initial discussion (as soon as possible following discovery of harm):		
<ul style="list-style-type: none"> • Clinical condition of the patient • Availability of key staff and support • Availability of patient's support person(s) • Patient preference • Privacy and comfort of the patient • Emotional and psychological state of the patient 		
Delegate communication of appropriate details to those staff that need to know (e.g., those managing the patient or who may be questioned by the patient or his/her family) to one team member.		
Special considerations or support required.		
Ongoing clinical care needs managed.		