

# 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

The support person(s) may be any individual the patient identifies as the nominated contact person about his/her care and may include family, a friend, a partner or those caring for the patient. 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.

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

### Identification of Key Individuals:

- Notify / consult all relevant health care professionals involved in the adverse event.**
- Identify person(s) to take responsibility for the initial disclosure conversation with the patient:**  
Name(s): \_\_\_\_\_
  - Known to the patient
  - Familiar with the adverse event and care of the patient
  - Good interpersonal and communication skills
  - Has a relationship with the patient (e.g., most responsible physician)
  - Received disclosure training \_\_\_\_\_
- Support person(s) (e.g., family member) for patient identified and available.**  
Name(s) & Contact Info: \_\_\_\_\_  
Relationship to Patient: \_\_\_\_\_

### Initial Disclosure Conversation:

#### Content should include:

- An appropriate apology
- Established and agreed upon known facts (don't include speculation, opinion or blame)
- Patient's questions/concerns
- Consequences of harm and any side effects to look for
- Discussion of ongoing care
- What happens next (investigation of adverse event and feedback to be expected)
- Arrangement for future meetings
- Contact details in case of further concerns or questions

#### Timing (as soon as possible following discovery of harm) taking into consideration:

- Clinical condition of the patient (ongoing clinical care needs must be managed)
- Availability of key staff and support person(s)
- Availability of patient's support person(s)
- Patient preference
- Privacy and comfort of the patient
- Emotional and psychological state of the patient

### Emotional Support Offered To:

- Patient and family members**
- Disclosing health professional**
- Health care professionals involved in the adverse event**

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Adapted with permission from the Australian Council for Safety and Quality in Health Care and the Health Quality Council of Alberta.