Safety and Quality

TOOL 12 - Open Disclosure MEETING Checklist

July 2016

Beginning the meeting

- [ ] Find a suitable place to hold the meeting, in consultation with the patient
- [ ] Turn off mobile telephones, beepers (if possible)
- [ ] Be conscious of positioning and body language
- [ ] Everybody is introduced and attendees names and titles are provided in writing
- [ ] Describe the purpose of the conversation

Listen and empathise throughout

- [ ] Assess the patient's understanding of what happened
- [ ] Identify the patient's key concerns
- [ ] Actively listen (repeat back in your own words what the patient is saying)
- [ ] Acknowledge and validate the patient's feelings

Expression of regret

- [ ] The lead will say they are sorry for the incident in a sincere manner early in the conversation, even if an expression of regret was provided in an earlier discussion

Explain the facts

What happened and the role of team members?

- [ ] Identify the incident early in the discussion
- [ ] Explain what happened in plain language
- [ ] Explain what is known about why the incident happened; do not speculate on causes, or criticise others
- [ ] Tell the patient what should have happened
- [ ] Explain your role in the incident and the role of other members of the clinical team
- [ ] Do not blame others or 'the system'
- [ ] Depending on the nature of the incident (e.g. preventability) consider using the word 'error' or 'mistake' with your colleagues

What are the consequences?

- [ ] Explain how the short-term consequences will be treated or managed
- [ ] Explain how the event is likely to impact the medium, and long-term health care and what will be done to care for the patient
- [ ] Explain how billing and other cost of consequent care will be managed (if applicable)
- [ ] Explain what will be done to ensure that a similar event doesn't happen to others.

continued

Closing the discussion

- [ ] Discuss the next steps and plan for a follow-up conversation
- [ ] Ask the patient if they have any questions and provide responses
- [ ] Provide the details of the health service contact person in writing

Following up

- [ ] Provide a written summary of the meeting to the patient
- [ ] File a copy of this summary in the patient record and upload a copy into the documents tab in the SLS Managers page.

For more information

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