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National Open Disclosure Programme

**Pre, During and Post Meeting Checklists**

**OPEN DISCLOSURE: PRE-MEETING CHECKLIST**

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| **Action** | **Completed Y/N** |
| Ensure continued clinical care to the patient to prevent further harm and provide other supports, as required |  |
| Assess patient safety incident for severity and level of open disclosure required (high level or low level) |  |
| Offer / provide support for staff involved in or affected by patient safety incident |  |
| Notify appropriate personnel / agencies |  |
| Update patient record and ensure the incident is reported on NIMS |  |
| Agree team to meet the patient or relevant person   * Lead Discloser * Deputy Discloser * Designated Person(Key contact person) |  |
| Consider if the protections of Part 4 of the Civil Liability Amendment Act 2017 are being sought (optional). If yes, prepare the relevant documentation and ensure process is followed – process and forms are available [here](https://www.hse.ie/eng/about/who/qid/other-quality-improvement-programmes/opendisclosure/open-disclosure-legislation/open-disclosure-legislationfroms.html). |  |
| Agree staff member to act as Designated Person (key contact person)   * Confirm name, telephone number and email address of the Designated Person |  |
| Designated Person to contact the patient or relevant person to:   * Arrange and agree meeting date and time * Provide an overview of what to expect at the meeting and who will be attending * Communication with the relevant person following the death of a patient must take into consideration and be led by the grieving process of the relevant person/family. * Discuss any venue requirements such as off site or access requirements * Encourage them to have a support person present with them at the meeting (discuss the number of people attending). Offer the services of an independent advocate, if required. * Consider need for interpreter services * Ask about any specific questions or concerns the patient/relevant person may have * Provide information re transport to venue and car parking arrangements * Send patient information leaflet |  |
| Book suitable venue based on the needs of the patient or relevant person |  |
| Arrange a pre-meeting of the Open Disclosure Team   * Agree the flow, content and structure of the open disclosure meeting * Identify a note taker * Consider any concerns/questions raised by the patient or relevant person to the Designated Person * Establish the facts and discuss any anticipated questions * Consider the timeframe involved in any review or other processes that are on-going as a result of the incident so that realistic timescales may be provided to the patient/relevant person. * Consider and agree the wording of the apology/expression of regret to be provided at the meeting * Consider any other additional requirements such as PPE |  |
| **Action** | **Completed Y/N** |
| Prepare room for meeting   * “Do not disturb" sign on door * Refreshments available * Tissues available (discreetly) * Room set up in a non-confrontational, relaxed style * Bathroom facilities nearby and checked |  |

**Additional Notes/Considerations**

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| **Checklist completed by:** |  |
| **Date:** |  |

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**OPEN DISCLOSURE: MEETING CHECKLIST**

|  | **Action** | **Complete Y/N** |
| --- | --- | --- |
| **Introductions** | * Designated person to meet, greet, and welcome patient/relevant person and their support person at agreed location and time and accompany them to the meeting room * On arrival at meeting room the patient/relevant person and support person are welcomed and thanked for attending this meeting * Introductions must include the names, job title and role of all persons present |  |
| **Housekeeping** | * Offer refreshments, ensure comfort * Provide information regarding facilities, toilets etc. * Offer breaks – e.g. “*If at any stage you feel that you need a break / refreshments or need time out to discuss anything we have said please let us know and we will facilitate that for you*” * Explain note taking e.g. “*We will be recording the key points discussed in this meeting today in writing and a copy of these meeting notes will be sent to you after the meeting*” |  |
| **Using the ASSIST model to structure the meeting** | |  |
| **Acknowledgment** | * Acknowledge what has happened and the impact on the patient/relevant person * Demonstrate understanding e.g. “*I know that this has been a very difficult time for you”.* |  |
| **Sorry** | * Provide a sincere and meaningful apology/expression of regret   *e.g. “I would like to express my sincere apologies to you for what has happened and for how this has affected you.”* |  |
| **Story** | * Encourage them to talk about what has happened from their perspective and how it has affected them * Listen attentively and actively without interruption * Summarise their story with empathy and understanding |  |
| **Inquire** | * Pause regularly to check understanding and provide clarification e.g. “*If at any stage you are unsure about anything or don’t understand anything we have said please stop us and ask for clarification”* * Encourage questions and provide factual answers e.g*. “What questions do you have?”* |  |
| **Solutions** | * Agree next steps and the proposed plan for their on-going care – involve the patient/relevant person in decisions made and ensure understanding. * Provide information about appropriate supports available to them. |  |
| **Travel** | * Provide reassurance to the patient/relevant person in relation to the on-going communication process - agree communication arrangements via the designated person – confirm contact details * Offer further meetings, if required. * Agree the action points. * Ensure that adequate time is provided for the closure of the meeting. * Check if the patient/relevant person has any further questions. * The Designated Person accompanies the patient/relevant person to the exit of the premises. They check in with them immediately following the meeting and confirm a follow up call. |  |
|  | | |
| **Documentation** | * The salient points of the open disclosure meeting will be documented in the healthcare record including the names of persons present, information and apology provided, agreed care/treatment plan and any actions agreed. |  |
| **After meeting review** | * The team should discuss the meeting and reflect on the outcome, what went well, any unanticipated matters that arose and reflect how they are feeling following the meeting. |  |

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| **Date:** |  |

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**OPEN DISCLOSURE: POST-MEETING CHECKLIST**

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| **Actions** | **Completed Y/N** |
| * Follow up call by the Designated Person to  1. Establish the patient/relevant person’s experience of the open disclosure meeting using the Patient Experience Questionnaire (attached) 2. Provide an update on any actions taken since the meeting   **(C)** Check if any further assistance is required |  |
| * Circulate the minutes of the meeting to all relevant parties for timely verification |  |
| * Send final meeting record to the patient/relevant person and keep a copy of the record in the open disclosure/incident management file. |  |
| * Document actions pertaining to the continued care/treatment of the patient in the patient’s healthcare record. |  |
| * Follow up on/complete agreed actions |  |
| * Send the outcome of the investigation or review to the patient/relevant person and offer them the opportunity to discuss |  |
| * Provide relevant updates to the patient’s GP |  |
| * Organise further meetings as required using above process |  |
| * File the minutes of the meeting, details of follow up actions and the meeting checklist in the Open Disclosure record |  |
| * Record the Open Disclosure meeting on the NIMS system |  |

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