



NATIONAL
OPEN DISCLOSURE
PROGRAMME

Open Disclosure Role of the Designated Person 20th October 2021



Our Values



Care
Compassion

Trust
Learning

Person Centred
Kindness

Empathy
Openness

Honesty



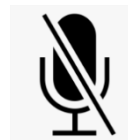
Seirbhís Sláinte
Níos Fearr
á Forbairt

Building a
Better Health
Service

National Quality Improvement Team

We will be starting in a few minutes. In the meantime please note:

- ☐ All attendees will be automatically muted so you can remain muted throughout the webinar. You are very welcome to engage in chat through the chat box
- ☐ The session is being recorded
- ☐ You can leave your video turned off



WELCOME!

When you join the webinar you can listen to the webinar over the computer but sound quality may be better over the phone should you wish to dial in:

Telephone details:

01 526 0058, when prompted enter the following access code: **2730 201 5964**

Please take a moment to **introduce yourself** through the chat box and tell others where you are joining from today



- RCPI approval to be confirmed
- 1.5 CEU NMBI
- Applies to attending live webinar.
- Certificate can be provided upon application to the National Open Disclosure office –
OpenDisclosure.Office@hse.ie

Today's presenters are

- **Catherine Hand**, Trainer and Educator National Open Disclosure Office
- **Josephine Griffin**, Patient Advocacy Liaison Officer, Mercy University Hospital, Cork

Objective of this webinar

Designated Person



- Provide an overview of this role with reference to the National Open Disclosure Policy(2019)
- To consider the role in the context of the Civil Liability (Amendment) Act 2017 and the current draft of the Patient Safety Bill
- To outline some key aspects of this role and its importance to the open disclosure process
- To discuss this role in an Acute Hospital Service

Role of Designated Person

Open Disclosure



- Critical to the outcome of OD meeting
- Identify a staff member to act as liaison between patient, service user, family and service
- Build rapport and trust
- Maintain communication processes
- Assist patient / relevant person with preparing for and attending an open disclosure meeting
- Provide support during and after the meeting
- Provide information on support services and/or other services available

Open Disclosure Policy

“The early assignment of a named designated person by the health services provider is necessary to maintain personal contact between the patient/ relevant person and the health services provider and to ensure that the patient/ relevant person do not feel isolated and that their support and communication needs in respect of the plans for the management of the incident are identified, communicated and addressed”. (HSE Open Disclosure Policy 2019)





HSE Incident Management Framework 2020



*Service User Designated Support Person** This person is a contact point for the service user/relevant person(s) impacted by an incident. The service user designated support person may facilitate feedback between the service user and the Review Team, as appropriate during the review process. They may also facilitate access to support services. To avoid any conflict of interest, the service-user designated support person should be impartial and sufficiently removed from the incident or its management.



Definition of a Designated Person

Civil Liability (Amendment) Act 2017



Section 15 (2) a person to liaise with the health services provider and the patient or relevant person (or both of them) in relation to the open disclosure of the patient safety incident that health services provider may designate—

- (i) an employee of that provider, including an employee who is a health practitioner,
- (ii) a health practitioner who provides a health service for that provider ...
- (iii) a person with whom that provider has entered into a contract
- (iv) an agency health practitioner who provides a health service for that provider pursuant to an agency contract
- (v) an agency worker, as the designated person in relation to the patient safety incident concerned

Civil Liability (Amendment) Act 2017



Specific role of Designated Person

Documentation of the designated person
Section 15

(3) A designation under subsection (1)(e) shall be in writing and shall be kept in the records ..., relating to the open disclosure of the patient safety incident

Civil Liability (Amendment) Act 2017



The designated person must keep a record of this request. Where this request is made, the designated person will notify the health practitioner to arrange a response

Complete the appropriate CLA prescribed forms

Draft Patient Safety Bill 2019



Patient Safety Bill: Section 16 – Designated Person

- (1) Provides for the designation by health services providers of a person (such as an employee or health practitioner) to act as a designated contact person for the patient/ family in relation to the open disclosure.
- (2) A designation under this section shall be in writing and shall be kept in the records, relating to the open disclosure of the notifiable incident made under this act



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Key support provided by Designated Person

- Patients who have experienced a poor outcome need practical, emotional and psychological support and this should arrive seamlessly.
- Being given the name and contact details for a Designated person is a key part of the national open disclosure process.
- The process of incident management and review can be confusing and lengthy therefore having a designated person can ensure that the patient / relevant person are supported and kept up to date in a timely and consistent manner.
- It is important to ensure that the patient/ relevant person is supported to participate fully and that their expectations are known and realistic.
- The designated person should have the necessary skills and experience required to fulfil this role.
- This role is also important in communicating the patient/ relevant person's perspective and wishes to the healthcare provider and open disclosure Team



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**The Open Disclosure
Process
using the MPS
A.S.S.I.S.T
Model of
Communication**

ASSIST Model

A – Acknowledge – what has happened and the impact on them

S – Sorry – express regret

S – Story – hear their story and summarise back to them

I – Inquire – seek questions to be answered, provide answers, give information

S – Solution – seek their agreement for the way forward – agree a plan

T – Travel – avoid abandonment – outline plan for their continued care and contact arrangements



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Managing the phone call

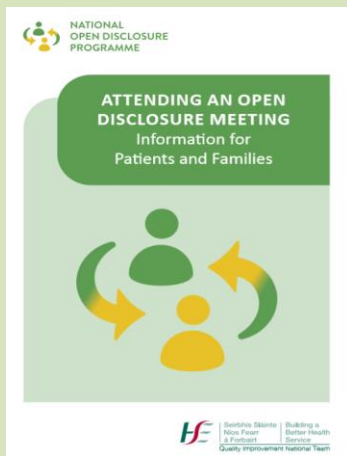


First phone contact: Designated Person to patient/relevant person

- ☐ Essential to establish the relationship
- ☐ Prepare well- all key details, names , important dates
- ☐ Prepare as for face to face meeting- quiet area , take a few moments to prepare
- ☐ Put yourself in the shoes of person receiving this call, their situation at home, time of day and length of time since the event- be aware that this call will have a significant impact on them
- ☐ Refer to “*Managing Open Disclosure by telephone*” quick reference guide

Role of Designated person

Initial contact



Initial contact with patient/ relevant person

- When appointed to this important role make initial contact with the patient/ relevant person to introduce themselves and their role
- Provide information and guidance in regard to the open disclosure meeting
- Give details including name, role, contact number and contact arrangements- ensure they know that all communication will follow this process
- Check their willingness and availability to attend a meeting- let them know who the open disclosure team will be and the purpose of the meeting
- Give information leaflet to help them prepare for the meeting
- Check if they have any requests regarding the venue for the meeting e.g. off site may be preferred following a traumatic event, consider access requests/requirements
- Encourage them to bring a support person to the meeting.

Contact with open disclosure team

- Confirm the patient/ relevant person's willingness to meet with the open disclosure team and confirm a meeting date and time



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Discussion

Experience of Designated Person in their service in regard to building rapport with the patient/family



Prior to the Open Disclosure meeting

Confirm meeting arrangements with patient/ relevant person

- Let them know date and time of meeting and check that this remains suitable for them
- Agree your meeting point at the venue
- Let them know any transport details needed and / or car parking arrangements
- Again confirm who the open disclosure team will be
- Ask if they have any questions or concerns and encourage them to write down any questions or information they wish to discuss with the team
- Confirm who will be attending the meeting with them- offer to assist them with arranging an independent advocate if they require this
- Offer to arrange interpreter services if English is not their first language
- Again give details of your name, role , contact number and contact arrangements- ensure they know that all communication will follow this process.
- Check if they have any requests or need any information or support at this stage

Contact with open disclosure team

- Let the team know of any requests, questions/clarifications made by the patient/ relevant person prior to this meeting and confirm who is attending to support them.

failing = prepare
to prepare - to fail



On the day of the meeting



On the day of the meeting

- Check meeting room and prepare for meeting- Do Not Disturb sign on door, comfortable chairs , drinking water, tissues and check bathroom facilities
- Pre meeting with OD Team and ensure all are ready for meeting
- Meet and greet the patient/ relevant person and their support person
- Accompany them to the meeting room and introduce them to OD Team
- Support them during the meeting by checking their understanding and assisting with questions they may have, if appropriate
- Note any additional supports offered and provide details
- Towards the end of the meeting check if the patient/ relevant person have any outstanding questions
- Note the follow up plan agreed and any actions to be taken
- Again agree contact arrangements between patient/ relevant person and OD Team

Immediately after the meeting

Empathy is

seeing with the eyes of another,
listening with the ears of another,
and feeling with the heart of another.

- Accompany the patient/ relevant person from the meeting room
- Check in with them regarding how they are feeling – *“how are you now”* – *“how did that go for you”*
- Provide any information regarding support services as appropriate
- Let them know that you will follow up with them by telephone
- Walk with them to the building exit and sort car park ticket, if appropriate.



Follow up call by Designated person

- Make call within two weeks of meeting
- Check with patient/ relevant person how they have been since the meeting
- Record any questions or requests made (CLA form if used)
- Give an update on any actions taken since the meeting
- Complete survey on their experience, as appropriate
- Maintain communication processes
- Provide information on support services available



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Case study

Examples of cases that demonstrate the importance of the role of Designated Person



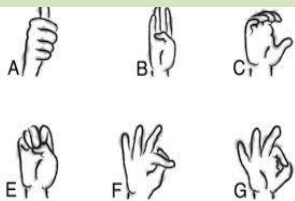


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Specific circumstances that may arise



- Communication challenges- arranging interpreter or sign language – other communication supports
- Reduced capacity- support with independent advocate
- Provide information regarding services available such as Bereavement Support
- Assist with advice and support in case of infection control challenges- support with PPE
- Arrange video call, if appropriate
- Link with finance department, if appropriate
- Manage information provided as per HSE OD Policy
- Support complaint process
- Support FOI request





Important role of Designated Person



Key actions to a successful Open Disclosure

- ☐ Establishing a good rapport and relationship with patient /relevant person (and support person) from the very start of the process.
- ☐ Ensuring that their wishes and preferences are respected
- ☐ Managing unrealistic expectations .
- ☐ Accurately conveying the facts and arrangements .
- ☐ Ensuring that patient knows that you are formally appointed to assist/ support them.
- ☐ Communicate any updates or unexpected changes to the original plan as soon as possible



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Skills for role

An outline of the skills and competencies required to fulfil this role of Designated Person



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**KEEP
CALM
AND
PRACTICE
SELF-CARE**

Support staff and self care

1. Consider impact of the open disclosure on the Team and staff involved in the incident- update on any developments following meeting- reflect on what went well / not well and why
2. Support from peers and managers is critical
3. Compassion is key
4. Promote self compassion and kindness
5. Staff need to be cared for and minded – psychological support is essential
6. Access support services as needed such as EAP, OH, Team talks or Schwartz rounds.



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Good news stories

1. Patient Partnership roles to be in place in Acute Hospitals and CHO areas early 2022.
2. Sharing learning- University Hospital Limerick have prepare a referral form for the Designated Person to support provision of accurate information and good communication

Open Disclosure Resources



- HSE Open Disclosure Policy
- Open Disclosure E-Learning on HSE LanD – “Communicating Effectively through Open Disclosure”
- RCPI “Gateway to Communication” programme
<https://courses.rcpi.ie/product?catalog=Gateway-to-Communication>
- Numerous Resources on Website including quick reference guide for Designated person, pre/ during and post meeting checklists, patient experience survey and patient leaflet :
www.hse.ie/opendisclosure
- National Office: opendisclosure.office@hse.ie



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Questions and Discussion

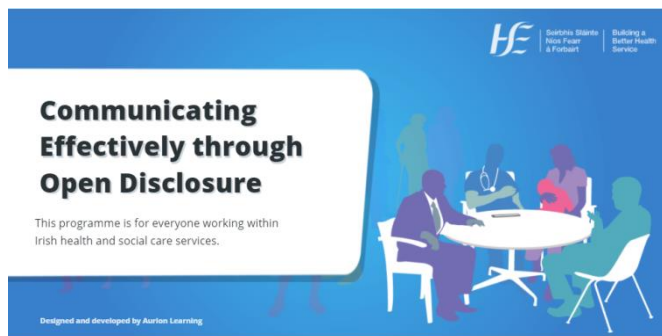




E-Learning Module 1

E-Learning Programme Module 1 – “Communicating Effectively through Open Disclosure”

<https://www.hseland.ie/dash/Account/Login>

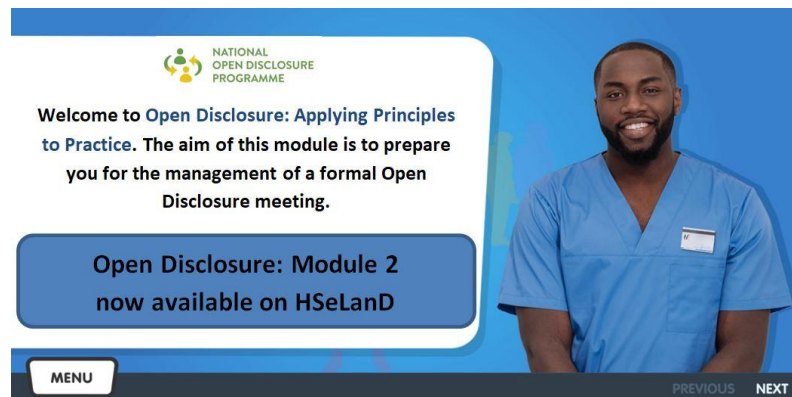




E-Learning Module 2

E-Learning Programme Module 2 – “Open Disclosure: Applying Principles to Practice”

<https://www.hseland.ie/dash/Account/Login>





Future Webinar

Wednesday 17th November 2021 at 11am

- “Implications for Open Disclosure in Mental Health Services”

Link and webinar details will be circulated at a later stage

Please email OpenDisclosure.Office@hse.ie with any suggestions for future webinars – all thoughts are welcome!

Evaluation

You will receive an email with a short survey on today's webinar.

We would really appreciate your participation with this to help inform future webinars.

Thank you!





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For further information and additional resources visit

www.hse.ie/opensdisclosure

Email: opensdisclosure.office@hse.ie



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