

FORMAL OPEN DISCLOSURE CHECKLIST 'C' – OPEN DISCLOSURE TEAM MEETING

This checklist may be useful for identifying tasks to be completed or delegated during a meeting of the open disclosure team to prepare for a formal open disclosure discussion with the patient and/or support person(s).

Please notify the Clinical Governance Unit when planning a formal open disclosure discussion.	
<input type="checkbox"/>	All relevant health care staff involved in the patient safety incident have been notified/consulted
<input type="checkbox"/>	Notify and invite the open disclosure advisor to the disclosure team meeting
<input type="checkbox"/>	Identify the person(s) responsible for the disclosure discussion with the patient and/or their support person(s). Where possible, this person will: <ul style="list-style-type: none"> • be known to the patient • be familiar with the incident and care of the patient • have good interpersonal and communication skills • be willing to offer an apology to the patient and/or support person(s) • be willing to maintain a close relationship with the patient • have received open disclosure training
<input type="checkbox"/>	Team discussion to include: <ul style="list-style-type: none"> <input type="checkbox"/> Which team members will attend the discussion with the patient and/or support person <input type="checkbox"/> Who will take notes to record the discussion and outcomes <input type="checkbox"/> Determining who will be the liaison/contact person for the patient / support person(s) <input type="checkbox"/> Establishing and agreeing on known facts and sequence of events : avoid opinion, speculation or blame <input type="checkbox"/> The known impact/s for the patient and/or support person(s) <input type="checkbox"/> Steps being taken to manage the impact and consequences of the incident <input type="checkbox"/> What to include in the apology and who will provide it <input type="checkbox"/> Encouraging/inviting the patient and/or support person to give their perspective of the incident <input type="checkbox"/> An early offer of reimbursement of out of pocket expenses. Agree on who will raise this with the patient/support person. <input type="checkbox"/> Anticipating potential questions from the patient and/or support person and considering answers <input type="checkbox"/> What key messages need to be conveyed to the patient and/or support person <input type="checkbox"/> Advice to provide on the review/investigation process <input type="checkbox"/> What practical/emotional support will be offered to the patient/support person(s) and health care staff involved in the incident and/or the formal open disclosure discussion <input type="checkbox"/> Advice to provide on complaints process or legal action if indicated

For more detailed information please refer to the Formal Open Disclosure section of the CEC Open Disclosure Handbook www.cec.health.nsw.gov.au/programs/open-disclosure