

## **Australian Open Disclosure Framework**

**Supporting materials and resources**

# **Open disclosure meeting planning and preparation template**

**Adapt this template to suit your local context and setting**

Template only

**Suggested citation**

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## What is the purpose of this document?

The *Open disclosure meeting planning and preparation template* is designed to assist staff planning and preparing for the first open disclosure meeting. It is also intended to facilitate communication and information sharing among the healthcare team and other relevant personnel at before and during the first open disclosure meeting and throughout the subsequent open disclosure process.

The template should be adapted to suit local requirements and applied in conjunction with the *Australian Open Disclosure Framework* and other resources. All national open disclosure resources can be accessed at [www.safetyandquality.gov.au/opendisclosure](http://www.safetyandquality.gov.au/opendisclosure)

## Using the template

All relevant information should be entered in the template and placed in the patient record or other suitable place so that it is accessible to the healthcare team. It is important that all personnel involved in the first meeting with the patient read and agree upon the contents of this document.

Once the need for an open disclosure process has been recognised, the first meeting with the patient, family and carers should occur as soon as possible. Using this template will assist that process.

### 1. Data & information

Patient's full name (including title)	
URN and date of birth	
Admission diagnosis and comments about management etc.	
Patient admission date	
Names and relationships of relevant next of kin/family/carers	
Date of incident triggering the open disclosure process	
Incident description <i>Known facts only</i>	
Incident outcome <i>Known facts only, avoid cause and effect statements</i>	
Plan for further incident management and investigation <i>(such as RCA, report to department, Coroner)</i>	
Healthcare providers/clinicians involved in patient care <i>Include consultants, anaesthetists and others as appropriate</i>	

## 2. First meeting

<p>Interpreter required for patient <i>If so, provide details of language and arrangements that have been or to be made</i></p>	
<p>Has the patient (if able) consented to sharing information with family members/others? <i>Give details</i></p>	
<p>Has the insurer been notified? <i>Include date of notification</i></p>	
<p>Date of first meeting</p>	
<p>Location of first meeting <i>Other details such as room booking, arrangements to ensure confidentiality if shared ward etc.</i></p>	
<p>Patient/family/carers understanding of the incident prior to the first meeting</p>	
<p>Person to be responsible for note taking</p>	
<p>Who will be the health service contact for the patient/family/carers?</p>	

## 3. Planning the disclosure dialogue

<p>Nominated individual to lead the discussion</p>	
<p>Expected patient concerns</p>	
<p>Apology or expression of regret <i>Avoid speculation and apportioning of blame</i></p>	
<p>Description of what happened <i>Known facts only, avoid blaming individuals and self</i></p>	
<p>Listening to patient/family/carers concerns (ensure they feel listened to)</p>	
<p>Discussion of what will happen next <i>(such as OR, further treatment, investigation into the incident)</i></p>	

Information to be provided about short/long-term effects	
Information on out-of-pocket expenses and costs of ongoing care prepared with relevant parties <i>e.g. indemnity insurer; see Australian Open Disclosure Framework Section 4.3</i>	
Assurance for patient/family/carers that they will be informed when further information comes to hand	
Information about further support available to the patient/family/carers	
Information provided in relation on how to take the matter further at any time <i>(such as internal and external complaint process. Avoid discussion about compensation without insurer consent, do not give legal advice but suggest patient seeks legal advice if information about compensation sought.)</i>	
Next meeting date and location	

#### 4. First meeting outcomes

Actual date and location of meeting	
Names of all present at first meeting <i>Include titles/position/relationship to patient etc.</i>	
Concerns expressed by patient/family/carers including requests for further information to be supplied	
Further support personnel identified <i>(such as pastoral worker or social worker)</i>	
Responsibility for documentation of the meeting in the medical record	
Name(s) of personnel given to patient/family/carers if they have further questions prior to subsequent meetings	

**5. Outcomes of subsequent meetings (if required)**

Date and location of meeting(s)	
Names of all present <i>Include titles/position/relationship to patient etc.</i>	
Concerns expressed by patient/family/carers	
Further support personnel identified	
Responsibility for documentation of the meeting in the medical record	
Responsibility for providing documentation to the patient/family/carers	
Name(s) of personnel given to patient/family/carers if they have further questions prior to subsequent meetings	

**6. Evaluation**

Open disclosure survey forms provided to clinical staff	
Open disclosure process evaluated	