

The Three Needs + Follow-up Disclosure Model reminder checklist

The Three Needs + Follow-up Disclosure Model Reminder Checklist The important elements of disclosure and related clinical care. Updated November 2019 Use this set of reminders to help guide communications and support patients and families.	
Meet the patient's clinical needs	
<input type="checkbox"/>	Protect the patient and others: Make the clinical environment safe (for example, remove biohazards and malfunctioning equipment)
<input type="checkbox"/>	Address urgent clinical matters
<input type="checkbox"/>	Provide options and propose a clinical way forward to mitigate the harm. Obtain informed consent for clinical investigations, treatments, and consultations - Do not overpromise an outcome
<input type="checkbox"/>	Facilitate further testing, treatments and consultations
<input type="checkbox"/>	Consider if it would be best for further clinical care to be assumed by others, and make timely arrangements
<input type="checkbox"/>	Introduce other providers if care is being transferred
<input type="checkbox"/>	Ensure the patient has their necessary equipment, e.g., hearing aides, glasses, assistive devices
Considerations in planning initial (early) disclosure meetings	
<input type="checkbox"/>	Appropriately report the event, call for help and advice
<input type="checkbox"/>	Consider who should be at the meeting
<input type="checkbox"/>	All team members should participate in planning
<input type="checkbox"/>	Determine a preliminary understanding of the facts and the main discussion points, agree on full disclosure of the known facts.
<input type="checkbox"/>	Discuss what questions might reasonably be asked, and determine how to respond
<input type="checkbox"/>	Anticipate the patient's emotional reactions
<input type="checkbox"/>	Determine where to meet (ideally private place free of interruptions)
<input type="checkbox"/>	Plan roles – who will lead, how team members will support each other
<input type="checkbox"/>	Meet the patient/family as soon as reasonably possible
<input type="checkbox"/>	Confirm whether there will be a formal review of what happened
<input type="checkbox"/>	Arrange social work, translation, cultural and spiritual support as required
<input type="checkbox"/>	Consider having a patient advocate present at the meeting

Discussions at initial (early) meetings	
<input type="checkbox"/>	Introduce everyone
<input type="checkbox"/>	Ideally sit at eye level; Provide your undivided attention
<input type="checkbox"/>	Listen actively, display empathy and provide support in a manner that promotes reconciliation
<input type="checkbox"/>	Ask what people's needs are - do not make assumptions
<input type="checkbox"/>	Be flexible in approach, adjusting to meet needs and concerns
Meet the patient's emotional needs	
<input type="checkbox"/>	Empathize, express regret and apologize appropriately early and at the end of the meeting
<input type="checkbox"/>	Be culturally sensitive and respectful
<input type="checkbox"/>	Respond to the patient's concerns
Meet the patient's information needs	
<input type="checkbox"/>	If language barrier, ensure translator is present at the meeting.
<input type="checkbox"/>	Acknowledge event
<input type="checkbox"/>	Deliberately seek out everyone's experience and concerns early in the meeting.
<input type="checkbox"/>	Ask if an explanation would be helpful. If this is confirmed, provide factual information on what is known.
<input type="checkbox"/>	Avoid using healthcare jargon
<input type="checkbox"/>	Do not speculate
<input type="checkbox"/>	Do not blame each other or others
<input type="checkbox"/>	Commit to learning what happened and improving
<input type="checkbox"/>	Answer questions
<input type="checkbox"/>	If it is known that a formal review of care is going to happen, share this information. Don't promise a review unless this has been confirmed
<input type="checkbox"/>	After consideration and analysis: Early on in the meeting, state accountabilities as appropriate with what is now known. Apologize appropriately
+ Follow-up needs	
<input type="checkbox"/>	Commit to follow up
<input type="checkbox"/>	Maintain open channels to answer further questions - provide specific contact information for a single point of contact (name and telephone number)
Documentation in the clinical record	
<input type="checkbox"/>	Relevant details, including meeting date and time, who was present, matters discussed, and expressions of empathy
<input type="checkbox"/>	Patient's condition
<input type="checkbox"/>	Investigation and treatment plans, including informed consent discussions