

Backgrounder

Development of the Canadian Disclosure Guidelines March 2008

The Canadian Patient Safety Institute (CPSI) was established in 2003 as an independent not-for-profit corporation, operating collaboratively with health professionals and organizations, regulatory bodies and governments to build and advance a safer healthcare system for Canadians. CPSI performs a coordinating and leadership role across health sectors and systems, promotes leading practices and raises awareness with stakeholders, patients and the public about patient safety.

Early in the mandate of the CPSI, five advisory committees were established to provide feedback and input into strategic initiatives in key areas of patient safety. The Legal and Regulatory Affairs Advisory Committee was established under this framework in the fall of 2005. The Committee's first recommendation was that the CPSI provide leadership and support for the development of national guidelines for the disclosure of adverse events.

In spring 2006, the CPSI brought together an interdisciplinary team of Canadian health-system stakeholders to form the Disclosure Working Group with the mandate to develop national guidelines for the disclosure of adverse events to patients and their families. The guidelines are intended to assist and support healthcare providers, interdisciplinary teams, organizations and regulators in developing and implementing adverse event disclosure policies, practices and training methods across Canada.

Following a year of collaborative work, which included a national and international environmental scan and extensive literature review to inform the development of the guidelines including the professional and legal aspects of disclosure in Canada, draft *Canadian Disclosure Guidelines* were developed. The approach taken in developing these guidelines was to integrate ideas and concepts from Working Group discussions, expert presentations and stakeholder consultations. Additionally, a number of local, provincial/territorial, national and international best practices were reviewed and synthesized.

In May and June of 2007, PRA Inc., an independent research firm retained by CPSI, conducted a nation-wide consultation process to receive comprehensive feedback on the draft guidelines. Representatives of targeted healthcare organizations and groups that represent healthcare professionals and patients across the country were sent an email invitation to complete a web-based survey. In total, 187 individuals or organizations responded to the invitation to participate in the online survey. Additional submissions were also accepted through direct correspondence with and between member organizations of the Disclosure Working Group.

In response to the consultation results, the Disclosure Working Group incorporated further revisions to the draft document. The final document was approved by the CPSI Legal and Regulatory Affairs Advisory Committee and adopted by the CPSI Board of Directors in December 2007.

The *Canadian Disclosure Guidelines* are posted on the CPSI English and French websites at www.patientsafetyinstitute.ca and www.securitedespatients.ca.

Disclosure Working Group Members

- **Brent Windwick**, Working Group Chair
- **Dawn Vallet**, CPSI May/06 – January/08
- **Paula Beard**, CPSI
- **Carolyn Hoffman**, CPSI May/06 – September/07
- **Elaine Borg**, Canadian Nurses Protective Society
- **Mike Boyce**, Healthcare Insurance Reciprocal of Canada
- **Pierre Deschamps**, National Council on Ethics in Human Research
- **Ward Flemons**, Health Quality Council of Alberta (HQCA) from Sept/07
- **Ronald Guse**, Manitoba Pharmaceutical Association, Canadian Pharmacists Association, Canadian Society of Hospital Pharmacists, National Association of Pharmacy Regulatory Authorities
- **Beth Kiley**, Canadian Healthcare Association
- **Katharina Kovacs Burns**, Public representation, Best Medicines Coalition
- **Christina Krause**, HQCA representative May/06-Aug/06, Special Advisor from Sept/06
- **Susan Kwolek**, Canadian College of Health Services Executives
- **Patricia Lefebvre**, Canadian Pharmacists Association, Canadian Society of Hospital Pharmacists, National Association of Pharmacy Regulatory Authorities
- **Mary Marshall**, Special Advisor (Legal support)
- **Heather McLaren**, Manitoba Health
- **Jessica Peters**, Canadian Council of Health Services Accreditation
- **Sylvia Ralphs-Thibodeau**, Canadian Nurses Association from Nov/06
- **Aviva Rubin**, Ontario Ministry of Health and Long-term Care
- **Hélène Sabourin**, Canadian Nurses Association, May 06-Oct 06
- **Jill Taylor**, HQCA representative Aug/06-Mar/07, Special Advisor from Mar/07
- **Trevor Theman**, Federation of Medical Regulatory Authorities Canada
- **Gordon Wallace**, Canadian Medical Protective Association
- **W. Todd Watkins**, Canadian Medical Association

About the Canadian Patient Safety Institute

The mission of the Canadian Patient Safety Institute (CPSI) is to provide national leadership in building and advancing a safer Canadian health system. In doing so, CPSI will focus its efforts in three areas:

- Defining patient safety issues in Canadian health care;
- Identifying leading practices and effective interventions; and
- Championing necessary change through partnerships, stakeholder engagement and transparent communication.

For more information, please contact:

Jim Durham Director Communications
Cell: 780-862-8127
Toll-Free: 1-866-421-6933

Kelly Bowman Communications Officer
Cell: 780-288-3847
Toll-Free: 1-866-421-6933