CANADIAN INCIDENT ANALYSIS FRAMEWORK

Checklist for Effective Meetings with Patients/Families

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F. CHECKLIST FOR EFFECTIVE MEETINGS WITH PATIENTS/FAMILIES

(Developed by Patients for Patient Safety Canada a patient-led program of the Canadian Patient Safety Institute)

This checklist has been developed to help prepare healthcare leaders and providers for meetings with patients/families when a patient safety incident is being discussed.

The most important attributes that leaders and providers can bring to these meetings are compassion, a willingness to listen and understand, and the ability to be supportive.

PATIENTS FOR PATIENT SAFETY CANADA | PATIENTS POUR LA SÉCURITÉ DES PATIENTS DU CANADA

When something unexpected occurs:

- » Acknowledge the event to the patient/family right away with an apology.
- » Ask about any immediate needs that the patient/family may have as a result of the unexpected situation (e.g. temporary assistance with housing, transportation, child care, grief or psychological support, etc.). Assist where possible.
- » Commit to find out what happened and how and why it happened.
- » Explain the analysis process (what will happen next).
- » Assist the patient/family in accessing information they request (e.g. test results, medical records).

Keep in touch:

- » Provide the patient/family with a contact person for questions or updates.
- » Connect with the patient/family at agreed upon intervals if this is their desire.
- » Inform the patient/family if there are changes or delays in the process.

Enable participation in the analysis process:

- » Ask the patient/family if they would like to meet with the review/investigation team.
- » Arrange for an interview with the investigators and the patient/family at a time/place that is agreeable and comfortable for the patient/family. Try to plan for this at the start of the analysis process.

Prepare for meetings with patients and families:

General:

- » Ask the patient/family what location would be most comfortable and when they would be able to meet.
- » Ask the patient/family who they would like to be at the meeting. Provide a list of participants and their positions in advance of the meeting.
- » Confirm meeting details. Assist with planning (e.g. parking, place to meet, to help them find the room, etc.).
- » Provide contact information (e.g. phone, cell phone) in case something changes.
- » Ask if there are other considerations that would be helpful for this meeting (e.g. ordering a taxi, parking pass, assisting with child care, accessible entrances, etc.).
- » Ensure the meeting room and location are appropriate (e.g. not on the unit or in the facility where the incident occurred) and large enough to accommodate the participants.
- » Consider holding meetings with the provider team in a different location or after the meeting with the patient/family to avoid the perception that the meeting

has already begun without them. Arrange for water, coffee/tea, tissue and a comfortable place for the patient/family to sit that is easily accessed from the door.

For review of analysis findings:

» Inform the patient/family that the review has been completed and where applicable, send copies of the reports to them.
» Ask if they would like to meet in person to discuss the report.

Prepare the team for meetings with patients and families:

» Ensure the team knows the location of meeting, time and date.
» Ensure the team attending are able to stay for the whole meeting.
» Ensure each team member knows what their role is and what is expected of them.
» Appoint a facilitator – to open the meeting, support the patient/family, ensure that there is an opportunity for questions to be asked, and close the meeting.

During the meeting with patients and families:

» Greet the patient/family at the agreed upon time and meeting place (arrive early) and escort them to the meeting room. Do not begin the meeting before the patient/family arrives.
» Provide orientation to the building (e.g. washrooms, coffee shop, cafeteria), as appropriate.
» Begin the meeting by appreciating the patient/family attending the meeting and with supportive statements (e.g. statements of compassion, apology).
» Introduce the team and all family members attending.
» Discuss how the meeting will be structured.
» Encourage the patient/family to ask questions and clarify information.
» Ask the patient/family for their perspective/insight during the meeting.
» Be compassionate and understanding of the patient/family's situation, especially if they get emotional during the meeting.
» At the end of the meeting, if appropriate, ask if the patient/family would be interested in staying in touch with the organization and updated on the progress of any of the recommended improvements.
» Summarize the meeting discussion. Include the key points raised or asked from the patient/family.
» Offer a plan and timeline for any further follow-up, if required.
» Thank the patient/family for attending the meeting – for their questions, their patience, their insight and information.
» Escort the patient/family from the meeting room to their means of transportation. Repeat building orientation (washrooms, coffee shop, parking lot, etc). Provide parking token or arrange for reimbursement.

Follow-up:

» Unless the patient/family have indicated otherwise, follow-up with a phone call a few days later to see if there are other questions, feedback or information.
» Follow-up with the patient/family on any outstanding items or questions.
» Follow-up with the patient/family as appropriate on learning, implementation of improvements, other opportunities to contribute to quality and safety.