

Appendix 3

Practices may find this checklist useful as an aide memoire to ensure a professional and standardised approach

Before, During and After Communication / Engagement Documentation Checklist

BEFORE	Note Taking
Service User's Full Name	
Healthcare Record Number	
Date of Birth	
Date of Admission	
Diagnosis	
Hey HSC professional(s) involved in service user's care	
Date of Discharge (if applicable)	
Date of SAI	
Description of SAI	
Outcome of SAI	
Agreed Plan for Management of SAI	

<p>Agreed professional to act as contact person with the service user / family</p>	
<p>Service user / family informed incident is being investigated as a SAI:</p> <ul style="list-style-type: none"> • Date • By Whom • By what means (telephone call / letter / in person) 	
<p>Date of first meeting with the service user /family</p>	
<p>Location of first meeting (other details such as room booking, arrangements to ensure confidentiality if shared ward etc)</p>	
<p>Person to be responsible for note taking identified</p>	
<p>Person Nominated to lead communications identified</p>	
<p>Colleague/s to assist nominated lead</p>	
<p>Other staff identified to attend the disclosure meeting</p>	
<p>Anticipated service user / family concerns / queries</p>	
<p>Meeting agenda agreed and circulated</p>	
<p>Additional support required by the service user / family, if any?</p>	

<p>The service user / family has been advised to bring a support person to the meeting?</p>	
<p>The service user consented to the sharing of information with others such as designated family members / support person?</p>	
<p>It has been established that the service user / family requires an interpreter? If yes, provide details of language and arrangements that have been or to be made.</p>	

Signature: _____

Date: _____