## CRISIS MANAGEMENT CHECKLIST

### Immediate Management

**Mitigating Harm**
- [ ] Provide immediate assistance to patient
- [ ] Notify attending physician
- [ ] Notify immediate manager/house supervisor, i.e. Chain of Command
- [ ] Notify Public Safety if needed
- [ ] Notify Risk Management
- [ ] Document facts in medical record
- [ ] Preserve Evidence/Ensure involved equipment, medical devices &/or agents are sequestered
- [ ] Submit UOR via online reporting system
- [ ] Early disclosure, facts known, to family & documented by attending physician
- [ ] Assess immediate support needed for Family, i.e. chaplaincy, social services
- [ ] Preserve Evidence: syringes, medication containers/vials, IV bags/tubing & medical devices are sequestered & notification to Biomed

**Notifications/Risk Management & Team**
- [ ] Notification to Crisis Management Team
- [ ] Notify Patient Accounts if necessary to hold patient billing
- [ ] Evaluate external reporting requirements
- [ ] Notification to Public Relations/coordination with Marketing if necessary
- [ ] Evaluate need for staff debriefing
- [ ] Initiate investigation, key witnesses, staff involved & expedited clinical summary utilizing Just Culture model and referral to HR as needed
- [ ] Secure medical records and other documents
- [ ] Notification to Risk Management Claims for PCE
- [ ] Encourage staff to maintain confidentiality; no gossiping, no speculating

### Follow Up

**Event Response/Investigation**
- [ ] Convene early meeting with staff to develop time-line, flow charts
- [ ] Communicate with insurance carrier, as well as collaboration with physician and physician’s carrier as necessary
- [ ] Review expedited clinical summary with CMO & other IA/Adverse team members
- [ ] Determine if intensive assessment/RCA required and if yes, identify key members needed to participate
- [ ] Determine need for ongoing emotional support for involved staff & physicians
- [ ] Consult literature and community resources for development of corrective action plan

**Disclosure & Family Support**
- [ ] Early disclosure communicated to family & documented. Disclose facts known and follow up when additional information is available-ongoing communication with family.
- [ ] Ensure family/patient has received appropriate support, i.e. chaplaincy, social work and ongoing mental health support
- [ ] Ongoing involvement and direction with disclosure process with physician and staff
- [ ] Address ongoing needs for patient/family
- [ ] Provide contact person and timeline to patient/family

**Corrective Actions**
- [ ] QA medical staff referral as necessary
- [ ] Assist with notification to regulatory agencies as needed
- [ ] Perform intensive review and root cause analysis
- [ ] Develop corrective action plan which addresses top key root causes with implementation responsibility & measureable outcomes
- [ ] Develop key lessons learned which are reported to boards and other MHS facilities
- [ ] Evaluate ongoing needs of staff