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# BIOETHICS CONSULTATION GUIDELINES INTAKE WORKSHEET

Referred by: \_\_\_\_\_

Date: \_\_\_\_\_

Intake by: \_\_\_\_\_

Date: \_\_\_\_\_

**A.** Patient's Chart Number: \_\_\_\_\_

**B.** Age & Sex: \_\_\_\_\_

Physician / Specialists: \_\_\_\_\_

**C.** **Medical Problems List**

**Treatment**

- |    | Medical Problems List | Treatment |
|----|-----------------------|-----------|
| 1. | _____                 | _____     |
| 2. | _____                 | _____     |
| 3. | _____                 | _____     |
| 4. | _____                 | _____     |
| 5. | _____                 | _____     |

Performance Status \_\_\_\_\_

**D.** Prognosis: \_\_\_\_\_

**E.** Patient's Attitudes & Competencies: \_\_\_\_\_

**F.** Patient's Occupation: \_\_\_\_\_

**G.** Patient's Religion: \_\_\_\_\_

**H.** Patient's Values & Beliefs: \_\_\_\_\_

Advanced Directives (code status): \_\_\_\_\_

Durable Power of Attorney: \_\_\_\_\_

**I.** Family's Situation: \_\_\_\_\_

Dynamics: \_\_\_\_\_

Decision Maker: \_\_\_\_\_

Power of Attorney / Guardian: \_\_\_\_\_

**J.** Family's Values & Beliefs: \_\_\_\_\_

The following 7 steps (Pg 2 of this form) are intended to guide the process of arriving at a recommendation as the outcome of a consult. While not comprehensive, these steps identify some essential considerations necessary for making a recommendation on behalf of the Ethics Committee. All of the steps may be delegated to different members of the consultation subcommittee / team. However, each step should be considered explicitly and discussed with all members of the consultation team or Ethics Committee before a final recommendation is made. Each step may need to be considered more than once, and earlier steps may need to be revisited in light of responses to later steps.

# ANALYSIS WORKSHEET

Date: \_\_\_\_\_

## STEP 1: Identify the question(s)

Why was the consult called? \_\_\_\_\_

On what criteria does a recommendation depend? \_\_\_\_\_

## STEP 2: Identify those involved / impacted by the situation

Who is affected by a particular decision to act? \_\_\_\_\_

Who is MOST affected by a particular decision? \_\_\_\_\_

## STEP 3: Identify the relevant facts

Consider [a] Patient diagnosis & prognosis; [b] Oversight regulations & legal issues; [c] Professional standards & Codes of ethics; [d] Institutional policies & values; and [e] Patient preferences & values.

## STEP 4: Identify relevant moral principles

Consider [a] Human dignity; [b] the common good; [c] justice; [d] beneficence; [e] respect for autonomy; [f] informed consent; [g] medical futility, [h] etc.

## STEP 5: Consider alternate options

Are there other options than treat or do not treat? \_\_\_\_\_

## STEP 6: Arrive at & justify recommendation

[a] Take turns expressing individual points of view; [b] summarize points of agreement; [c] debate and discuss points of conflict until a decision that everyone can live with is reached; [d] provide those who cannot support the recommendation and/or may be involved in the procedure an opportunity to opt out for reasons of individual conscience; and [e] consider whether the directly intended effect(s) and the chosen means entailed by the recommendation are consistent with relevant moral norms.

## STEP 7: Review & follow-up

Determine whether [a] all parties involved are comfortable with the decision, and if not, whether provisions for conscience were found to be acceptable; [b] individuals with relevant experience were consulted; [c] informed consent was obtained prior to implementation; [d] appropriate steps were taken to act in a timely manner; [e] this issue requires an institutional response; [f] learning resulted from this case or issue; and [g] consult was properly documented & reported.

DOCUMENTED BY: \_\_\_\_\_

DATE: \_\_\_\_\_