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
   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

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: __________________