

Purpose: This document is meant to be used to facilitate your organization's post-incident review after an incident involving an adverse behavior by a person in your care (e.g., resident, patient, student, etc.). The goal of the review meeting is to determine if the care plan was executed effectively, if any changes to the care plan are required, or if additional staff training is necessary to prevent a similar incident from occurring in the future.

Instructions:

- Review the incident as soon as possible after it's occurred to understand how and why it happened.
- Attempt to have all staff who were involved or witnessed the incident and the supervisor/manager who was in charge at the time of the incident attend the meeting.
- If possible, include a facilitator who can help focus the discussion on understanding the event and assist in developing corrective actions.
- Encourage participants to use constructive feedback and observations to support improvement.
- Appoint a person, usually the facilitator or manager/supervisor, to document the incident review.
- Share any changes to the care plan or lessons learned within the department to promote improvement.
- If follow-up actions are identified, assign someone to implement those items and document when they're completed.
- Provide additional resources or training to any necessary staff identified in the review.

Post-Incident Review Form:

Date of Review: _____

Date of Incident: _____

Review Participants: _____

1. **What happened?** Who was involved? What behaviors were exhibited? Where did the incident happen? When did the incident occur? Was the Care Plan followed?

2. **Why did it happen?** Include details about what triggers or other factors may have contributed to the incident.

3. **What could be done to potentially reduce the probability of it happening again?** Is the current Care Plan appropriate? What changes to the Care Plan (if any) need to be made? Is additional training required?

4. **Who should receive the information learned from this review (e.g., management, safety committee, etc.)?**

5. **Who will be responsible for following up to ensure that corrective actions are in place and effective? When?**