

CONFIDENTIAL when completed

Ethics Worksheet *

- I** Identify the facts (known and needed)
- D** Discuss the related values & principles
- E** Explore your options
- A** Act on the best option

Date	
Contacted by	
Contact information	

Step 1: Identify the Facts – what you know and gaps in what you know

Medical Indications

medical problem, history, and diagnosis; is it acute, chronic, critical, emergent, reversible? Goals of treatment? Probabilities of success? Plans in case of therapeutic failure? Potential benefits of care? How can harm be avoided?

Patient/Client Preferences

State the patient/client's preferences. Do they have the capacity to decide? If yes, are the client's wishes informed, understood, voluntary? If not, who is the substitute decision-maker? Does the patient/client have prior, capable, expressed wishes? Is the patient/client's right to choose being respected?

Quality of Life

Describe quality of life in the patient's/client's terms – with and without the possible treatments. Are there any biases on the team's part that might affect their idea of the quality of life? Might the patient consider the prospects for quality of life to be undesirable for themselves?

Contextual Features

Any other family involved or significant supportive relationships? Any care plans in place so far? Relevant social, legal, economic, and institutional circumstances? Other relevant features, e.g., religious/cultural factors, limits on confidentiality, resource allocation issues, provider conflict of interest?

* Adapted from JCB Core Curriculum Working Group IDEA which is adapted from Thomasma and Marshall 1995; Jonsen, Seigler and Winslade 1998; Toronto Community Care Access Centre *Community Ethics Toolkit* 2005.

Step 2: DISCUSS the Related Values and Ethical Principles

Think of the values and principles that may be in conflict or at risk of being lost or overlooked. Consider the corporate values of Southlake, the Patient Declaration of Values, and any professional codes of ethics or other relevant statements. See some suggestions below.

*****This step is often the most difficult – please feel free to contact Ethics for help.*****

<p>Values and principles</p>	<p>Consider the relevance to this question or situation, to the people involved in different ways. Acknowledge if it is not clear – and ask for some help with clarifying. The ethical dilemma often involves values and principles we hope to uphold, but which conflict directly with each other.</p>

Some principles to consider:

RESPECT FOR AUTONOMY: Is someone's right to make choices based on their personal values and beliefs being respected or not?

DIGNITY: Are we dealing with everyone as they wish to be treated, as individuals, with compassion, respected, heard, and understood?

PATIENT-CENTRED CARE: Are we respecting and responding to the patient's or family's values, preferences, decisions or self-identified best interests?

JUSTICE/FAIRNESS: Are we ensuring equitable access to resources and opportunities? Are we treating people and groups fairly? Are we providing people with ways to openly express their opinions?

TRANSPARENCY: Are we communicating options and decisions, and the rationale behind these, to all involved stakeholders? Are doing this in an accurate, timely, and understandable way to assist in their decision making?

DIVERSITY: Are we accommodating, protecting and supporting differences, including religious, cultural, political and other differences, among people and groups?

Step 3: Explore Options

What reasonable choices exist? Which actions are possible in this situation?

Is each option consistent with relevant statutes, regulations, policies, standards, etc. (from Step 1)?
What outcome would you predict for each option and how would key stakeholders be affected?

Option	Strengths	Limitations

Which option is most ethically justifiable?

Which option(s) is/are ethically acceptable and ethically unacceptable? Why? Identify the most ethically defensible option and the ethical principles, likely outcomes, etc. that support it. If key stakeholders disagree, can an ethically acceptable compromise be reached?

Step 4: Act and then evaluate

(a) Help develop an action plan for the option chosen in Step 3:

Recommend the best option, and support its implementation. Who is the best person/group to implement the decision, including a plan to communicate the decision and its rationale? How will the plan be monitored and followed up?

(b) If an ethically defensible option cannot be agreed upon/has not been selected, the following steps will be taken (for treatment decisions, consider the possible usefulness of involving the Public Guardian & Trustee or the Consent and Capacity Board – ask Ethics for more information):