

Recommended Steps Prior to Conducting an Incident Based Nursing Peer Review

(Items are listed in ideal sequence of completion)

Polly Hansen MN, RN, CNS, CCNS, CCRN, PCCN

Nurse Manager (NM)	NM & CNS	Clinical Nurse Specialist (CNS)
1. Conducts an initial investigation of the event and then, in collaboration with NE, PM, PCS Director, and Risk Manager (RM), determines whether event meets RCA or Peer Review criteria.	5. Determine comparable units from which to invite peer reviewers,	10. Asks two nurse managers of comparable units to provide names of potential reviewers who would be available on the date scheduled for the review (minimum of 2 nurses from more than 1 clinical unit preferred). CNS may also invite any additional clinical experts with relevant knowledge to the situation.
2. Asks nurse(s) involved to write a summary of the event to include relevant dates, times, key clinical findings, applied interventions, detailed communications related to the event, and all individuals involved.	6. Identify other clinical experts (if needed),	11. Requests assistance from a 2nd CNS who will act as scribe for the review. The 2nd CNS may also contribute to dialogue, but their primary responsibility is to serve as the recorder of the proceedings.
3. Invites a CNS to facilitate the dialogue at the review session.	7. Coordinate scheduling and location of the review	
4. With the facilitator, and Risk Manager determine whether RM presence at review is needed.	8. Plan for a 1.5 to 2.0 hour meeting	
9. Informs the involved nursing staff of scheduled review and adjusts staffing schedule to ensure their required attendance.		
12. It is recommended that the Nurse Manager and/or Supervisor not be present unless directly involved in the incident.		
13. Appoint a member of the team to review the record and prepare a synopsis of the event		
14. Reviews the patient record and develops a brief synopsis of the event to present at the beginning of the review. Key issues or questions are identified to help guide discussion.		
15. If not already done, each nurse involved prepares a written statement/story of the chain of events, including contributing factors and the thinking behind his/her actions and communications. Each nurse provides a verbal presentation of that story at the review.		

Recommended Steps During an Incident Based Nursing Peer Review

(Items are listed in ideal sequence of completion)

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Clinical Nurse Specialist	Presenting Nurse(s)	Reviewing Nurses	Facilitator
1. Facilitates introduction, establishes purpose and goals, and reviews ground rules for the discussion.	4. Describe the occurrence and other key considerations.	5. May ask clarifying questions, as needed.	6. Opens the floor for questions and subsequent dialogue from the reviewers. Facilitator ensures that the reactions, recommendations, and support from reviewers flow naturally, within an environment that remains safe and respectful throughout the process.
<p>2. The following opening comments are suggested:</p> <p>a. Peer Review is a responsibility of any profession, creating autonomy and accountability for professional practice. The intent of the Peer Review is to explore what happened and the factors that influenced decisions, actions & communications.</p> <p>b. It is not the responsibility of a Peer Review to judge or discipline. Confidentiality must be honored.</p> <p>c. Respectful inquiry and dialogue is expected at all times. Allow people to complete their thoughts without interruptions. A speaker queue may be helpful to make sure that each speaker has the opportunity to make comments or ask questions</p>	8. When all voices are heard and no more dialogue is needed, the unit nurses are thanked for their participation and kindly dismissed.	10. The reviewers remain for further discussion.	9. Informs the nurses to whom and when the results of the review are dispersed.
3. Presents brief overview of the event (2-3 minutes) and then turns the story over to the nurses involved to share.			
7. May provide additional relevant information.			
11. After the unit nurses are dismissed, the CNS facilitates dialogue to achieve the identified goals of this specific peer review. Upon conclusion of the conversation, the CNS thanks the reviewers for their time, expertise, and participation in this professional process.			
12. Recommendations and possible action items from the reviewers are summarized and confirmed. The Just Culture algorithm will be utilized as indicated			

Recommended Steps After an Incident Based Nursing Peer Review

(Items are listed in ideal sequence of completion)

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Facilitator	Nurse Manager	CNS
1. The CNS facilitator and scribe transcribe a written summary of the meeting, conclusions, and recommendations within 24-48 hours. The tone of the meeting (e.g. professional communication, emotional volatility, visible signs of participants' stress, degree of accountability and/or ownership) may be important to note in the report	3. The Nurse Manager informs involved staff of results of review within 48-72 hours of review.	2. The CNSs written report is hand delivered to the Nurse Manager and other leaders as requested. DO NOT EMAIL because emails may be retrieved for legal purposes
	4. The Nurse Manager and leadership determine next appropriate steps.	