



Bereavement Checklist

These forms may be completed by bereavement coordinator, social worker, spiritual counselor or whomever your agency designates to handle bereavement. It is not limited by discipline credentials.

| Title | Notes |
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| BEREAVEMENT RISK ASSESSMENT | <p>Complete within 5 days of admission. The Bereavement Risk Assessment identifies bereaved contacts and associated risk factors. Also, categorizes bereaved as either low risk, moderate risk, or high risk so bereavement needs and care plan can be tailored specifically to each bereaved person's needs. Is only amended if there's a change such as:</p> <ul style="list-style-type: none"> • Add another bereaved contact for that specific patient • Modify the level of risk associated with a particular bereaved contact's grief response • Change in contact information of the bereaved individual(s). |
| BEREAVEMENT FOLLOW-UP REPORT | <p>As needed. Completed with each significant outreach during ongoing bereavement; e.g., phone, memorial service, funeral etc. Assess for emotional, spiritual and coping status of the bereaved and interventions taken to assist bereaved person. Utilized when a follow-up phone call or visit has taken place</p> <p>This form should be also filled out along with info discussed and documented in both sections of the Bereavement Info Status</p> <p>The Follow Up Report form does NOT take the place of UPDATING Bereavement Care Plan.</p> |
| BEREAVEMENT PROGRESS NOTE | <p>The Bereavement Progress Note can be used for a variety of situations including PRN visits, phone calls, care plan meetings, care coordination, etc.</p> |
| CARE PLAN & UPDATE: BEREAVEMENT | <p>The Bereavement care plan is used consistently on an ongoing basis throughout the bereavement process.</p> <p>Created after the patient dies and updated with each outreach such as:</p> <ul style="list-style-type: none"> • Discussions concerning bereaved • Phone communication with a voice mail • Support group attendance • Bereavement mailings • Memorial services attendance • Discontinuing of services |
| BEREAVEMENT DISCHARGE SUMMARY | <p>After Bereavement ends: (12/13 months following date of death). It is utilized to close out the bereavement file.</p> <p>Any time the Bereavement Care Plan has been discontinued, rather requested by bereaved or termination of services. This document does not replace UPDATING the Plan Of Care.</p> |
| BEREAVEMENT CAREGIVER REPORT | <p>Run Monthly. Provides a detailed list of all individuals being followed for bereavement during a selected time frame to assist with mailings and tracking.</p> <p>Bereavement Report includes:</p> <ul style="list-style-type: none"> • Caregiver type • Beareved's relationship to the patient • Contact info: Address, Phone numbers, Email address |
| STICKY NOTES TAB | <p>As needed: eDocs Sticky Notes Tab is often used for planning & note taking and sharing info with team that will not hit the chart.</p> |



Notes
