

Appendix 4 - Quick Screening: Check and Challenge Bias Proforma

Case reference:

Assessor name and role:

Date: Click or tap to enter a date.

Proposed weighting (before check): ☐ Low / ☐ Moderate / ☐ High

Scoring Aide - Use this only to prompt reflection. Do not substitute for judgement.

0–1 consider Low, 2–3 consider **Moderate**, 4+ consider **High**.

-  Personal bias present and unmitigated: +2
-  Professional bias present and unmitigated: +2
-  Gaps in evidence or inconsistency with prior cases: +1
-  Clear potential for harm, recurrence, or significant learning: +2
-  Vulnerability or bereavement context clearly enqaged: +1

1) Personal bias self-check	2) Professional bias self-check	3) Evidence and consistency check	4) Language and attribution check	5) Proportionality and equity check	6) Quick peer challenge <i>(recommended, especially if any bias boxes are ticked)</i>
☐ I notice a strong emotional reaction to the complainant, family, staff, or subject.	☐ My professional background aligns me with one team or viewpoint in this case.	☐ I have reviewed all available information, not only what supports my first impression.	☐ My notes avoid labels about the person (for example “difficult”, “obsessive”).	☐ Similar concerns would receive a similar weighting regardless of who raised them.	Reviewer name and role:
☐ I have prior knowledge or contact with those involved.	☐ Familiarity with a service, process, or colleague may be affecting neutrality.	☐ The complainant’s account is considered alongside staff accounts.	☐ I have separated facts, observations, and interpretations.	☐ Communication volume or tone has not reduced or increased the weighting.	☐ I have read the summary and rationale.
☐ My values or experience influence sensitivity to this issue.	☐ I am relying on “typical” patterns in my specialty rather than this case’s evidence.	☐ The proposed weighting uses the same criteria applied to similar cases.	☐ I have avoided implying blame before investigation.	☐ Protected characteristics, vulnerability, or bereavement context are recognised without stereotyping.	☐ I can follow the link between evidence and the proposed weighting.
☐ I am making assumptions about motivation or credibility.	☐ I may be protecting my own service or role.	☐ The rationale links to potential harm, risk, recurrence, vulnerability, and learning value.	☐ I have recorded uncertainty where appropriate.	☐ Multi-agency aspects are acknowledged so weighting is not narrowed by organisational boundaries.	☐ I do not identify unmitigated personal or professional bias.
☐ My view is influenced by communication style rather than substance.	☐ I have sought a second view from a different profession to balance perspective.	☐ The rationale is clear enough for a colleague to understand without further context.			☐ I agree the weighting is proportionate and unbiased.
Mitigation:	Mitigation:	Action:			Comments:

Decision and rationale – final weighting (after check): ☐ Low / ☐ Moderate / ☐ High

Brief rationale:

Assessor Signature and Date: