Curricular Components That Support the Functions of EPA 12: Refer Patients Who Require Consultation

1. Making appropriate decisions to refer based on knowledge of referral guidelines
   - Applies medical knowledge to reach preliminary problem identification
   - Recognizes limitations and accesses information such as guidelines, expert opinion, and evidence in the literature
   - Discusses the reason for referral with family/patient, shares the diagnostic and/or therapeutic goals of the referral, and addresses any concerns
   - Exercises proper judgment regarding decision to refer by applying all relevant gathered data, evidence, and family/patient considerations

2. Making the referral and ensuring its completion
   - Determines acuity of patient and decides on the urgency of the referral
   - Performs the appropriate pre-referral assessment: laboratory tests, imaging, etc.
   - Recognizes and assists in managing the logistics of the referral: how patient will make an appointment, access to specialty given identified urgency, insurance issues, etc.
   - Clarifies understanding and agreement of plan with the family, including the reason for referral, expected time frame, logistics, and roles for family/patients, referring provider, and consultant
   - Communicates with the consultant, using appropriate method of communication (phone, written referral, etc.) based on urgency of consultation, and provides a clear referral request containing the key information necessary

3. Appropriately providing post-referral patient care, coordination, and follow up
   - Reviews consultant report or follows up with consultant in the absence of a report, with the goal of identifying any next steps for patient care, including clarification of findings, procedures performed, recommendations, and/or ongoing management issues
   - Provides ongoing patient care as needed and refers back to specialist for indicated follow up and/or complications
   - Collaborates with family regarding referral process and results

Curricular Components Authors

Sue Poynter (lead), Marsha Anderson, Michael Barone, Ann Burke, Sharon Calaman, Anna Kuo, Jerry Larrabee, Kenya McNeal-Trice
References