EPA 12: Refer Patients Who Require Consultation

Supervision Scale for This EPA

1. Trusted to observe only
2. Trusted to execute with direct supervision and coaching
3. Trusted to execute with indirect supervision and discussion of information conveyed for most simple and some complex cases
4. Trusted to execute with indirect supervision and may require discussion of information conveyed but only for selected complex cases
5. Trusted to execute without supervision

Description of the Activity

Referring patients for consultation for issues outside the scope of the pediatrician’s knowledge and skills is critical to performance in practice.

The specific functions which define this EPA include:

- Making appropriate decisions to refer based on knowledge of referral guidelines
- Making the referral and ensuring its completion
- Appropriately providing post-referral patient care, coordination, and follow up

Judicious Mapping to Domains of Competence

- Patient Care
- Medical Knowledge
- Practice-Based Learning and Improvement
- Interpersonal & Communication Skills
- Professionalism
- Systems-Based Practice
- Personal & Professional Development

Competencies Within Each Domain Critical to Entrustment Decisions

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<thead>
<tr>
<th>PC 6</th>
<th>MK 1</th>
<th>PB LI 3</th>
<th>ICS 1</th>
<th>PPD 1</th>
<th>PPD 8</th>
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<tbody>
<tr>
<td>Using optimal clinical judgment</td>
<td>Demonstrating knowledge</td>
<td>Performing learning activities</td>
<td>Communicating with patients/families</td>
<td>Engaging in help-seeking behaviors</td>
<td>Dealing with uncertainty</td>
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Context for the EPA

Rationale: Pediatricians must be able to anticipate, diagnose, and manage the health and medical needs of a broad spectrum of patients. Additionally, pediatricians must understand their own limitations in the context of their clinical practice and recognize those medical conditions that require further consultation and referral.

Scope of Practice: The scope of practice for this EPA includes patients of all ages from newborn to young adulthood. A generalist is expected to manage the common problems that occur in these patients, but certain conditions will require consultation with a specialist or health care agency. Appropriate referral of patients for issues outside of the scope of expertise is part of the pediatrician’s responsibility to patients and families.

Curricular Components That Support the Functions of the EPA

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

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References