Curricular Components That Support the Functions of the EPA: Facilitate Handovers to Another Health Care Provider Either Within or Across Settings

Functions of the health care provider handing over the care of a patient:

1. Engaging in bidirectional communication of plans and conveying family and patient preferences
   - Integrates the expectations of the patients, families, and caregivers to ensure consistency of the plan
   - Encourages the receiver to ask clarifying questions
   - Promotes a shared mental model of the patient and plan of care at the time of transition

2. Preparing for a handover by reviewing the medical record and updating the written tool (if applicable) to avoid errors of omission
   - Demonstrates effective use of a standardized written or computer-based template to prioritize and organize information for handover
   - Ensures document efficiently and effectively supports the transfer of information
   - Appropriately updates document with new information added, while removing information that is no longer relevant

3. Communicating situation awareness, illness severity, a patient summary, action planning, and contingency planning to other health care providers, using a standardized template to improve reliability of the information transfer
   - Follows a template to eliminate omissions of data
   - Modifies template as needed based on patient acuity or needs of the receiver (for example, delivering the patient summary by systems in an intensive care unit, but by problems for an outpatient setting)
   - Demonstrates the ability to assign illness severity, recognizing differences in patient acuity level by setting
   - Utilizes a concise patient summary within the template to create a shared mental model about the patient, a description of pertinent events and course to date, and an up to date assessment and plan for the patient’s diagnoses and problems
   - Develops a discrete action list with clear instructions with respect to timeline, priority, and the person responsible for completion
   - Communicates clear contingency plans in an “if ... then ...” fashion that promotes situation awareness and a shared mental model of patient care

Functions of the health care professional receiving a handover and accepting responsibility for the patient include:

4. Summarizing the information heard, asking questions when needed to clarify information and to fill any perceived gaps
   - Delivers a synthesis of the handover, not a repetition of the complete handover, to confirm a shared mental
5. Asking questions when needed for clarifying information and to fill any perceived gaps  
   - Asks clarifying questions as needed to ensure accurate transfer of complete patient information without ambiguity and to correct any erroneous information delivered  
   - Ensures that there are no miscommunications or errors of omission

6. Restating key action items to ensure understanding  
   - Clarifies timelines for key action items  
   - Ensures that contingency plans, for the patient, are established and understood

7. Providing feedback to the individual initiating the handover on any problems/errors that occurred, including inaccurate information transmission  
   - Corrects written tool as appropriate if errors are noted  
   - Engages in a post-shift dialog with the handover provider to provide feedback when a problem/error, resulting from a gap in the handover information, occurs during a shift

General Pediatrics Authors
Marsha Anderson, Michael Barone, Ann Burke, Sharon Calaman, Carol Carraccio. Anna Kuo, Jerry Larrabee, Kenya McNeal-Trice, Sue Poynter, General Pediatrics EPA Curricular Elements workgroup

Subspecialty Authors
Diane Stafford (team lead), Deb Boyer, Daniel Fein, Matthew Kronman, George McDaniel, John Mahan, Aditee Narayan, Jay Nocton, Tom Parker, Sheryl Ryan, Cary Sauer, Franklin Trimm, David Turner

References