

## EPA: Initial Consultation

### Demographics

Completed by trainee or assessor

#### Details on Case Complexity

- **Uncomplicated:** straight-forward patient case/problem
- **Complicated:** the patient has additional co-morbidities including family, social, psychological and societal issues (e.g. considering chemotherapy for an elderly person who lives alone)
- **Complex:** the patient requires more advanced medical expertise (e.g. considering platinum based chemotherapy to a patient with renal insufficiency)

**Trainee:** [pull-down menu of names]

**Assessor:** [pull-down menu of names]

**Type of Assessment:**  Direct Observation  Case Discussion

**PGY:**  PGY 4  PGY 5

**Stage of Residency:** [pull-down menu]  
1. Transition to disciple (TTD)  
2. Foundations of disciple (FOD)  
3. Core of discipline (COD)  
4. Transition to practice (TTP)

**Rotation Service:** [pull-down menu]  
Med Onc  
Hematology  
Palliative Medicine  
Radation Oncology  
Other: \_\_\_\_\_

**Hospital/service:**  MSH  SHSC-OCC  THP-CV  UHN-PMCC  Other: \_\_\_\_\_

**Tumour site:** [pull-down menu]  
Breast  
Colorectal  
Lung  
Prostate  
Other tumour sites: \_\_\_\_\_

**Case Complexity:**  Uncomplicated  Complicated  Complex  Other: \_\_\_\_\_

**Goal of consult:** [pull-down menu]  
Curative  
Adjuvant (including neo- and pseudo- adjuvant)  
Non-curative (disease modifying therapy)  
Non-curative (supportive care alone)  
Other: \_\_\_\_\_

## Assessment

Completed by assessor

Indicate the rating that best applies:

1. Needs considerable coaching or feedback in this element
2. Needs some support and refinement in this element
3. Competent in THIS element
4. Proficient in THIS element

NOTE: If unable to assess, indicate No Rating (NR)

Enter self-assigned 4-digit signature code: \_\_\_\_\_

<b>Ascertains the patient's understanding of the reason for the consultation:</b>	<input type="radio"/> NR	<input type="radio"/> 1 Needs considerable coaching or feedback	<input type="radio"/> 2 Needs some support and refinement	<input type="radio"/> 3 Competent in THIS element	<input type="radio"/> 4 Proficient in THIS element
<b>Performs a comprehensive clinical assessment including assessment of PS and goals of care:</b>	<input type="radio"/> NR	<input type="radio"/> 1 Needs considerable coaching or feedback	<input type="radio"/> 2 Needs some support and refinement	<input type="radio"/> 3 Competent in THIS element	<input type="radio"/> 4 Proficient in THIS element
<b>Interprets available investigations and ascertains which additional investigations/diagnostic tests required to complete the assessment and allow formulation of a management plan:</b>	<input type="radio"/> NR	<input type="radio"/> 1 Needs considerable coaching or feedback	<input type="radio"/> 2 Needs some support and refinement	<input type="radio"/> 3 Competent in THIS element	<input type="radio"/> 4 Proficient in THIS element
<b>Synthesize and interpret information from clinical assessment and investigations to provide an impression:</b>	<input type="radio"/> NR	<input type="radio"/> 1 Needs considerable coaching or feedback	<input type="radio"/> 2 Needs some support and refinement	<input type="radio"/> 3 Competent in THIS element	<input type="radio"/> 4 Proficient in THIS element
<b>Develop a management plan that is evidence-based and aligned with the patient's goals of care:</b>	<input type="radio"/> NR	<input type="radio"/> 1 Needs considerable coaching or feedback	<input type="radio"/> 2 Needs some support and refinement	<input type="radio"/> 3 Competent in THIS element	<input type="radio"/> 4 Proficient in THIS element

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<p><b>Provide effective explanation for the proposed goals of management and elicit patient's understanding of the management plan:</b></p>	<p><input type="radio"/> NR</p>	<p><input type="radio"/> 1 Needs considerable coaching or feedback</p>	<p><input type="radio"/> 2 Needs some support and refinement</p>	<p><input type="radio"/> 3 Competent in THIS element</p>	<p><input type="radio"/> 4 Proficient in THIS element</p>
<p><b>Initiate the next steps in the management plan:</b></p>	<p><input type="radio"/> NR</p>	<p><input type="radio"/> 1 Needs considerable coaching or feedback</p>	<p><input type="radio"/> 2 Needs some support and refinement</p>	<p><input type="radio"/> 3 Competent in THIS element</p>	<p><input type="radio"/> 4 Proficient in THIS element</p>

**FEEDBACK & COMMENTS**

2-3 Focused Suggestions for Improvement

**Describe strengths:**

**Actions or areas for Improvement:**

**Other comments:**

**OVERALL Entrustment in the EPA at this time**

**Initial Consultation:**       No, not entrusted       Yes, entrusted

**Reason not entrusted:**      [pull-down menu]  
 Needs some support and refinement in THIS activity at this time  
 Needs considerable coaching and development with THIS activity at this time  
 Other  
**Other:** \_\_\_\_\_