

Activity 1: Obtain a history from a patient

DESCRIPTION OF ACTIVITY

The ability to elicit, analyse and interpret all relevant information from a patient's history is a vital skill required for patient evaluation and clinical management.

Interns should be able to take an accurate focused history from a patient, in a structured and logical fashion, and in a respectful and professional manner. The history should be tailored to the clinical situation and specific patient encounter. An awareness of cultural safety for the patient, in particular for Hauora Māori, should be demonstrated.

FUNCTIONS

Interns should:

- Obtain an accurate and focused clinically relevant history in a structured fashion while demonstrating an understanding of the patient's preferences, values and beliefs.
- Adapt their approach to a range of patient circumstances including where patients may be hesitant or unable to provide detailed information and where collateral history is needed.
- Identify and utilise, resources such as previous clinical records, interpreters, appropriate aids and alternate sources of information to obtain history when required. This includes, but is not limited to whānau/family members, primary care doctors, residential facilities and pharmacy staff.
- Understand how cultural factors, including the patient's feeling of cultural safety in the doctor-patient relationship and clinical environment, can influence the patient's description of symptoms and presentation of illness.
- Consider the cultural safety of the patient and be respectful when working with all patients and communities, acknowledging Māori as tāngata whenua. Examples include using Tikanga, following Kaupapa, using Te Reo, and embracing the importance of Whanau Ora.
- Practise shared care that respects the patients' rights and values, and upholds the Code of Health and Disability Services Consumers' Rights¹.

¹ Code of Health and Disability Services Consumers' Rights, *Health and Disability Commission*. Source: <https://www.hdc.org.nz/your-rights/about-the-code/code-of-health-and-disability-services-consumers-rights/>, Accessed: 4/11/18

Activity 2: Perform a physical examination

DESCRIPTION OF ACTIVITY

Interns should be able to perform a focused physical examination, including a mental state examination, that is relevant to the patient presentation, to identify and document abnormal findings and accurately describe such findings to team members.

Physical examinations should be tailored to the clinical situation and specific patient encounter.

FUNCTIONS

Interns should:

- Demonstrate examination techniques in a way which respect the patient's dignity and safety.
- Recognise and demonstrate when to extend the examination to include sensitive examinations.
- Perform a thorough clinical examination which is relevant to the presenting complaint and correctly interpret the elicited physical signs.
- Understand the relative value of physical signs in informing the differential diagnosis.
- Ensure that physical examination is carried out in a respectful and culturally safe manner.

Activity 3: Formulate a differential diagnosis following a clinical encounter

DESCRIPTION OF ACTIVITY

Interns need to be able to integrate and consider all information from the clinical assessment of a patient and to develop a list of clinical diagnoses in order of priority. Formulation of a differential diagnosis enables a clinically appropriate management plan to be developed for the patient.

It is essential to record documentation which includes sufficient information outlining the patient's clinical problems and clear reasoning behind the clinical management plan.

FUNCTIONS

Interns should:

- Create a comprehensive and ranked problem list which contains appropriate differential and working diagnoses.
- Engage with supervisors and team members for endorsement and verification of the working diagnoses and clearly document the clinical reasoning that led to the working diagnoses.
- Re-evaluate and update the patient problem list as new information including results become available
- Recognise and understand the presentation of common acute and chronic problems and conditions.
- Understand and recognise the abnormal physiology and clinical manifestations of the deteriorating or critically unwell patient.
- Demonstrate an awareness of potential biases that operate in clinical decision making.

Activity 4: Request and interpret common investigations

DESCRIPTION OF ACTIVITY

Interns should be able to order and interpret common investigations using evidence-based knowledge and cost-effective principles e.g. 'Choosing Wisely'.

In providing care, effective treatment should be based upon the best available evidence². In particular, interns should recognise when further advice and help with interpretation should be sought from colleagues.

FUNCTIONS

Interns should:

When requesting a test:

- Select, request and provide informed rationale for the decision to order the investigation. Consider best evidence for the need to order any tests including radiological imaging and procedures.
- Distinguish the positive and negative aspects of health screening and prevention when making health care decisions.
- Demonstrate an awareness of unconscious bias and take corrective steps to address this when ordering tests.
- Identify and utilise, where appropriate, interpreters, and alternate information from whānau/family and other sources, to ensure that a patient has the information they require to give informed consent for an investigation.
- Recognise when to seek further advice when considering complex, costly, and invasive procedures which they may not be familiar with.

Interpreting investigations:

- Follow up and interpret investigation results to guide patient management and understand the implications and urgency of an abnormal result. Seek assistance as needed.
- Provide clear and honest information to patients and their whānau/family and/or carers about test results to help them understand their condition.
- Understand and apply the importance of confidentiality when discussing results of investigations.
- Use electronic resources appropriately in accessing and interpreting results.
- Know which diseases are notifiable and the correct process of notification.

² *Good Medical Practice, Cole's Medical Practice, Medical Council of New Zealand (2017) Page 12*

Activity 5: Prescribing of medication

Description of the activity

Prescribing medication is an integral part a doctor's work and one that has clinical, ethical and legal considerations.^{3,4}

Although interns are working under a level of supervision, they still must abide by the laws and stipulations outlined by the Medicines Act 1981 and Medical Council standards.^{3,4}

The prescriber must have adequate knowledge of the patient's health and be satisfied that the medication is in the patient's best interests.^{3,4}

It is expected that when prescribing, interns will work closely with their supervisor, colleagues, and multi-disciplinary team, and use available reputable resources to ensure safe and appropriate prescribing of medications and treatments.

FUNCTIONS

Interns should:

- Demonstrate understanding of the patient's current condition, comorbid conditions, physiological state, allergies and personal/whānau/family preferences that underpin the prescription for the medication or treatment.
- Demonstrate working knowledge of the modes of action, indications, contraindications, and need for dose adjustment for any medication they are prescribing.
- Demonstrate a working knowledge of the protocols, resources and other health professionals that are relevant to prescribing, monitoring and reporting of adverse events related to a medication or treatment.
- Prescribe medication safely in verbal, written and electronic formats. This includes the prescription of controlled drugs
- Know indications, contraindications, advantages and disadvantages including side effects and possible adverse effects of common pharmaceutical and non-pharmaceutical interventions
- Demonstrate an awareness of unconscious bias and take corrective steps to address this when prescribing medicine or choosing treatment options.

³ **Medical Council of New Zealand.** Good prescribing practice. Wellington: Medical Council of New Zealand, 2016.

⁴ **Morris, Kevin.** *Cole's Medical Practice.* Wellington : Medical Council of New Zealand, 2017.

Activity 6: Document a clinical encounter in the patient record

Description of the activity

Accurate documentation is essential to ensuring good continuity of care for a patient and communication of their progress and wishes to the entire health care team. It is considered a vital part of good practice for doctors⁵ and forms an important part of evidence to support a doctor, if concerns over care are raised.

It is also a critical component of ensuring Right 4 of the Code of Health and Disability Services Consumers' Rights⁶ is met. Interns must also have an understanding of their obligations in documentation of health information as set out by the Health Information Privacy Code.⁷

FUNCTIONS

Interns should:

- Demonstrate the ability to accurately and comprehensively record a patient encounter in a timely, legible and logical manner – for both paper and electronic systems.
- Ensure that documentation is clearly attributed to them i.e. dated, timed, signed, name and role printed
- Consider the authenticity and origin of all information recorded in the documentation e.g. avoids blind copying and pasting, records data from secondary sources.
- Comply with legal requirements regarding documentation of health information.
- Maintain privacy of patient information; orally, documented and electronic.
- Document patient preferences which may influence clinical decision making.

⁵ Morris, Kevin. *Cole's Medical Practice*. Wellington : Medical Council of New Zealand, 2017.

⁶ Code of Health and Disability Services Consumers' Rights. Retrieved from HDC:
<https://www.hdc.org.nz/your-rights/about-the-code/code-of-health-and-disability-services-consumers-rights>

⁷ Health Information Privacy Code 1994. Retrieved from Privacy Commissioner:
<https://www.privacy.org.nz/the-privacy-act-and-codes/codes-of-practice/health-information-privacy-code-1994/>

Activity 7: Oral presentation of patient presentation

Description of the activity

Effective oral presentation of a patient presentation is a key activity that interns are expected to perform and improve on throughout training.

Medical professionals need to be able to concisely present a summary of a clinical encounter to other health care professionals and multidisciplinary team members. Sometimes patients and whānau/family may be present, which will allow for a shared understanding of the patient's current condition.

In order to be able to provide an oral presentation, the intern needs to be able to take the information gathered and put together an accurate assessment of the patient's current condition.

FUNCTIONS

Interns should:

- Be able to provide an accurate, concise, and well-organised oral presentation based on information that has been personally gathered or verified, acknowledging any areas of uncertainty.
- Adjust the oral presentation to meet the urgency and needs of the receiver of the information.
- Assure closed-loop communication between the presenter and recipient of the information to ensure that both parties have a shared understanding of the patient's condition and needs.

Activity 8: Develop evidence-based, patient-centred management plans

Description of the activity

It is expected that interns will appropriately advise patients on their treatment options and have a reasonable knowledge of the range of evidence-based treatments that are available to treat their condition.⁸

To effectively do this, interns must be able to first identify the key clinical questions and resources available. They then need to know how to effectively retrieve, appraise, consider and put all information together to address their question and put it into a clinical context. Interns need to recognise when specific clinical decisions are 'beyond current scope of practice' e.g. decisions around palliation, thrombolysis etc. and seek senior assistance. If a patient lacks capacity to consent to treatment, then act in what is perceived as the patient's best interests based on whānau or previous wishes e.g. advanced care plans.

Management plans should demonstrate shared decision making.

FUNCTIONS

Interns should:

- Develop a clear, focused, pertinent clinical question based on clinical scenarios or real-time patient care.
- Be able to appraise the quality of both the sources and content of medical information using accepted criteria.
- Use information technology to identify accurate and reliable online medical information.
- Demonstrate the ability to apply evidence and the relevance of medical literature and published studies to specific patients.
- Apply research findings to a clinical scenario, ensuring that patient's cultural safety
- Effectively communicate their findings to the health care team as well as the patient and their whānau/family.
- Develop an understanding of how to manage uncertainty when diagnosis is unclear.

⁸ Morris, Kevin. *Cole's Medical Practice*. Wellington : Medical Council of New Zealand, 2017

Activity 9: Give or receive a patient handover to transition care

Description of the activity

The ability to create and communicate relevant, concise, accurate summaries of patient information and their management is a key skill required for safe practice within a health care team or between teams in different contexts (primary/secondary care).

The Health and Disability Commission Code of Rights states “*Every consumer has the right to co-operation among providers to ensure quality and continuity of services.*”⁹ In an environment of rotating shifts, time must be set aside to ensure safe handover of patients.¹⁰

Handover also occurs in a variety of other settings – when tasks are delegated from senior staff, when patients are discharged to, or admitted from, primary care referred to another service or transferred to another hospital

Health care teams within New Zealand are increasingly making use of electronic systems to improve management of inpatient care. The modern interns’ participation in handover includes an expectation to utilise available technology effectively to ensure safe transition of care. To provide these services interns must be able to both give and receive between peers and colleagues or transferring care to an external provider.

FUNCTIONS

Interns receiving handover information should:

- Engage in closed loop communication.
- Receive handover in both verbal and written formats to minimise errors.
- Assume full responsibility of required care.
- Ask clarifying questions.
- Ensure maintenance of patient privacy/confidentiality.

Interns providing handover information should:

- Provide handover in an appropriate environment free from distraction.
- Use local system of written/electronic records to ensure all relevant information is included in handover.
- Use a systematic approach, based on local protocols, to provide handover.
- Provide succinct, relevant information about patient condition and next steps in plans for management.
- Check full comprehension of transmitted information.
- Ensure maintenance of patient privacy/confidentiality.

⁹ **Code of Health and Disability Services Consumers' Rights.** Retrieved from HDC: <https://www.hdc.org.nz/your-rights/about-the-code/code-of-health-and-disability-services-consumers-rights>

¹⁰ **Morris, Kevin.** *Cole's Medical Practice.* Wellington : Medical Council of New Zealand, 2017.

Activity 10: Participate as a member of a multi-disciplinary team

Description of the activity

Collaborative multi-disciplinary and patient-centred care aligns with international and Māori models of medical care including Te Whare Tapa Whā: the four cornerstones of health. These cornerstones encompass all facets of wellbeing: taha tinana (physical health), taha wairua (spiritual health), taha whānau (family health) and taha hinengaro (mental health)¹¹.

The 2016 New Zealand Health Strategy defines the team as *“a high trust system that works together with the person and their family and whānau at the centre of care”*¹².

Right 4 in the Code of Health and Disability Services Consumer Rights: Right to Services of an Appropriate Standard states that: *“Every consumer has the right to co-operation among providers to ensure quality and continuity of services.”*

It is the expectation that during prevocational medical training, interns develop the necessary skills to work collaboratively within the patient centred multi-disciplinary team, where the patient is central, in order to achieve safe and high-quality outcomes for patients and providers. This would include working with cultural advisers and consumer advocates.

FUNCTIONS

Interns should:

- Be able to identify the role and functions of each member of the multi-disciplinary team and understand the strengths, expected contributions and limitations of various professional roles in patient care.
- Commit to work cooperatively within the multi-disciplinary team, acknowledging that the expertise and skills of each profession contributes to improved clinical outcomes for the patient. This also involves communicating professionally and respectfully with other health workers, the patient and their whānau/family.
- Tailor communication content and style to align with health care professionals' roles and functions, the patient's cultural safety and level of understanding.
- Ensure that adequate written notes and verbal communication exist so that all members of the multi-disciplinary team are adequately informed about all relevant aspects of patient care.
- Understand that communication equity exists for all team members, but that interns work under the supervision of the Senior Medical Officers in the multi-disciplinary team.
- Understand that patients are also members of the multi-disciplinary team. Patient-centred care, partnerships and a recovery approach are likely to foster greater patient cooperation and adherence to medical care regimes¹³.

¹¹ Durie M. A Maori perspective of health. Soc Sci Med 1985;20:483–486

¹² <https://www.health.govt.nz/publication/new-zealand-health-strategy-2016>

¹³ Hibbard JH, Greene J. What the evidence shows about patient activation: better health outcomes and care experiences; fewer data on costs. Health Aff 2013;32:207–214

Activity 11: Recognise and manage a patient requiring urgent or emergent care

Description of the activity

In order to provide safe patient-centred care, it is important for the intern to function as a collaborative member of the multi-disciplinary team. This includes the ability to communicate well with other team members, including nursing staff, patients and their whānau/family, and to be able to respond appropriately to concerns raised.

Interns can then triage and prioritise their tasks on a basis of urgency. Early recognition of the deteriorating patient is key. Tools can be used to facilitate this, e.g. early warning scoring systems, and interns should be aware of local practice in this respect.

Interns must have insight into the limitations of the care that they can provide and be willing to ask for help appropriately.

All interns should be able to participate as a member of the resuscitation team and provide basic life support to patients who have suffered a cardiopulmonary arrest. They should be able to participate as a member of the resuscitation team.

FUNCTIONS

Interns should:

- Be able to provide basic life support.
- Be able to participate as a team member that can provide advanced life support, including being adept in the use of defibrillators – both manual and Automated External Defibrillators (AEDs).
- Must successfully complete a New Zealand Resuscitation Council Certificate of Resuscitation and Emergency Care Advanced (NZRC CORE Advanced) or equivalent Advanced Cardiac Life Support course during their first postgraduate year.
- Recognise and prioritise patients in need of urgent or emergent care and work collaboratively with other members of the health care team to achieve this
- Maintain insight into the limitations of their knowledge and skills in caring for the deteriorating patient and call for help appropriately and in a timely manner.
- Recognise acutely ill deteriorating or dying patients, and know when to seek help based on their clinical assessment.

Activity 12: Obtain informed consent for tests, treatment and/or procedures

Description of the activity

Patients have the right to make an informed choice about their care, and in most instances must give permission to proceed with treatment. That permission is called 'informed consent'. It is an interactive process between the doctor, the patient and sometimes those close to the patient such as their family or whānau. Interns have a responsibility to ensure that informed consent is obtained and that they have communicated and worked with the patient to help them make the best decision for themselves.

Consent is an interactive process, not a one-off event. Interns can participate in taking informed consent by providing information to patients and caregivers, and answering questions. They should always be aware of their limitations in obtaining informed consent. Interns should be able to communicate the risks, benefits and potential complications of a procedure and identify alternative treatment options. Ultimately, the doctor undertaking the treatment is responsible for the overall informed consent process.

Patients have the right to refuse treatment and withdraw consent at any time. All patients are presumed competent to give informed consent unless established otherwise.

The need for informed consent is not limited to invasive interventions or procedures. Verbal informed consent should be obtained for lower risk procedures e.g. taking blood specimens, inserting a luer, obtaining an ECG. Verbal informed consent should also be obtained for examination, particularly sensitive exams

MCNZ has issued a full statement on Informed Consent "Informed Consent – Helping patients make informed decisions about their Care"¹⁴. Interns should be familiar with this.

FUNCTIONS

Interns should:

- Assist the patient to make informed decisions by ensuring that they:
 - Provide the information needed in an honest and open way
 - Communicate effectively.
 - Treat patients with respect
 - Involve others when making decisions. This includes others that the patient would like to involve e.g. family or whānau, as well as more experienced and senior doctors
- Document discussions during the consent process, including if the patient declines information about treatment
- If a patient lacks capacity to consent, then the intern should contact someone who has the legal right to make decisions on the patient's behalf e.g. an enduring power of attorney for the patient's personal care and welfare

¹⁴ Informed Consent – Helping patients make informed decisions about their Care: insert [http://](#) when finalised

- In situations where immediate life-saving treatment is needed and it is not practical or possible to discuss with the patient or their family / whānau before going ahead with treatment, interns should take into account what is good practice and what is in the patient's best interests. Interns should document the treatment provided and discuss it with the patient and their family or whānau at the earliest opportunity.
- If interns are unsure about any aspects of gaining informed consent, they should seek advice appropriately. This can be from senior doctors, their medical indemnity insurer or the MCNZ.

Activity 13: Perform basic procedural skills

Description of the activity

By the end of their second post-graduate year, interns should be confident and competent in performing some basic procedural skills. It is recognised that competent practitioners are not always successful in their first attempt at a procedure but recognising when to call for help is critical.

Obtaining competency in basic procedural skills provides interns with the capacity to provide for patients in accordance with the Health and Disability Code of Patient Rights, which includes a clause stating that *“Every consumer has the right to have services provided with reasonable care and skill.”*¹⁵

FUNCTIONS

Interns should:

- Confidently perform basic procedures such as:
 - basic life support
 - advanced life support, including defibrillation and bag valve mask ventilation, as part of a cardiac arrest team
 - venepuncture
 - IV cannulation
 - ECG
 - basic suturing of uncomplicated wounds
 - arterial blood gas
 - urinary catheterisation
- Understand and justify how and why a procedure is performed.
- Explain to patients and their whānau/family why a procedure is being performed (when applicable) and gain their informed consent, including:
 - the indications
 - contraindications
 - potential risks versus benefit profile
 - alternative options
 - potential complications
- Manage complications of procedures and reflect on why they might have occurred to inform future practice. Also reflect on the impact on the patient and self.
- Seek assistance in a timely fashion if a procedure is proving to be more difficult than expected.

¹⁵ Health and Disability Commissioner (1996) Code of Health and Disability Services Consumers' Rights. Available from: <https://www.hdc.org.nz/your-rights/about-the-code/code-of-health-and-disability-services-consumers-rights/>

Activity 14: Contribute to a culture of safety and improvement

Description of the activity

Health care professionals should strive to improve population health, individual health experience and decrease waste in health care¹⁶. In addition, they should maintain their own health and wellbeing, as this underpins high quality health care delivery and reduces clinician burnout¹⁷.

Interns should speak up for safety when appropriate and 'Choose Wisely' when ordering investigations. They should engage in quality improvement activities as appropriate for their level e.g. assisting in audit during PGY2.

The Institute of Medicine¹⁸ has identified six ways in which health care can be improved:

1. **Safety** - health care should be safe for patients and occur through safe systems.
2. **Timeliness** - health care should be delivered in a timely manner. This includes prioritisation of urgent care as well as minimising waiting times to be seen in clinics, the Emergency Department, investigations etc.
3. **Efficiency** - reduce waste in the health care system for example, 'choose wisely' when deciding on investigations; decreasing double-handling; increasing safety strategies that minimise error and its associated costs.
4. **Effectiveness** - health care should be evidence-based.
5. **Patient-centred** - health care should be responsive to a patients values, expressed preferences, needs and should be culturally sensitive.
6. **Equity** - improve the health care of the population as a whole, whilst decreasing the equity gap that exists – notably in the health of Māori as tāngata whenua.

Many of the above tenets of health care practise have been enshrined in the Code of Health and Disability Services Consumers' Rights.¹⁹

FUNCTIONS

Interns should:

- Act professionally at all times.
- Provide patient-centred care in an environment that fosters cultural safety.
- Comply with the Code of Health and Disability Services Consumers' Rights at all times.
- Engage in quality improvement strategies such as clinical audit, to ensure safe, timely and efficient care.
- Practice evidence-based medicine.
- Practice appropriate resource stewardship e.g. 'Choosing Wisely'.

¹⁶ Berwick DM, Nolan T, Whittington J. The Triple Aim: Care, health, and cost. *Health Aff* 2008;27(3):759-769.

¹⁷ Sikka R, Morath JM, Leape L. The Quadruple Aim: care, health, cost and meaning in work. *BMJ Qual Saf* 2015;24(10):608

¹⁸ Institute of Medicine. *Crossing the quality chasm: a new health system for the 21st century*. Washington, D.C.: National Academy Press c2001; 2001.

¹⁹ Health and Disability Commissioner (1996) Code of Health and Disability Services Consumers' Rights. Available from: <https://www.hdc.org.nz/your-rights/about-the-code/code-of-health-and-disability-services-consumers-rights/>

- Be engaged in providing and receiving appropriate ongoing education and supervision.
- Maintain their own health and wellbeing and have their own GP. Interns should also reflect on ways in which they can keep themselves healthy.