

## Guidelines for Equine Veterinary Case Referral Executive Summary

The Veterinary Oath obligates practicing veterinarians to use their knowledge and skills for the benefit of society and the prevention of animal suffering. This is often best accomplished through the coordinated efforts of multiple individuals working on behalf of a single patient to provide the highest quality veterinary care in a professional and collegial environment. This document was developed through the collaborative efforts of the American Association of Equine Practitioners (AAEP), American College of Veterinary Internal Medicine (ACVIM), American College of Veterinary Surgeons (ACVS), American College of Theriogenologists (ACT), and American College of Veterinary Emergency and Critical Care (ACVECC) with a goal of providing practical communication guidelines for individuals who collaborate in equine patient care.

### Definitions

**Referring Veterinarian:** The veterinarian (or group of veterinarians) providing care at the time of the referral.

**Receiving Veterinarian:** The veterinarian (or group of veterinarians) to whom a patient is referred.

**Consultation:** A communication between two or more veterinarians concerning the diagnosis and/or care of a patient.

**Referral:** The transfer of responsibility for diagnosis and/or care of a specific problem from a referring veterinarian to a receiving veterinarian.

**Recognized Veterinary Specialist:** A veterinarian who is certified by an AVMA-recognized veterinary specialty organization. Only those individuals who have completed all aspects of the specific training and testing required by a recognized veterinary specialty organization can describe or advertise themselves as a veterinary specialist. These individuals are ethically bound to only advertise or claim expertise in their area of board certification. Veterinarians who have completed internships or residencies but have not fulfilled all of the requirements of a specialty discipline (e.g. credentials and testing), may not call themselves veterinary specialists and the terms “board eligible” or “board qualified” should not be used. The AVMA has stated that only veterinarians who have been certified by an AVMA-recognized specialty organization should refer to themselves as specialists.

**Legal Owner/Client:** The legal owner is the individual or syndicate of individuals who have legal ownership of the horse. The term “client” refers to the agent with legal authority to make health care decisions for the horse at the time it is being examined and treated. This individual may be the legal owner, trainer, caretaker, or other proxy.

It is in the best interests of individual horse health that veterinary professionals work as a team to provide the highest quality of veterinary care possible in an environment of exceptional client service and education. For this to happen, it is imperative that clear lines of communication and responsibility be established between veterinarians, clients, and other interested parties.

### Prior to Referral

Prior to referral, it is the responsibility of the referring veterinarian to be aware of specialty referral resources in their geographic area, communicate the option of referral to the client in a timely fashion, and contact the receiving veterinarian to discuss the patient. It is the responsibility of the receiving veterinarian to provide appropriate preliminary visit information to the referring veterinarian and

owner or agent of the horse. The referral process functions optimally if the owner or agent communicates clearly their expectations for the horse and the limits of costs that may be incurred. It is important that all parties provide a clear and accurate medical history to the receiving veterinarian. Both the referring and the receiving veterinarian should emphasize a team approach to patient care.

## **During the Referral Visit**

During the referral visit, the referring veterinarian transfers the responsibility for health-care decisions to the receiving veterinarian but remains accessible for communication. The receiving veterinarian should clearly explain all aspects of the examination, evaluation, diagnostic, and treatment procedures and options to the client. This process should emphasize support of the referring veterinarian to the fullest extent possible without a compromise of integrity. The receiving veterinarian should communicate with the referring veterinarian and client regularly about case progression and decisions. The receiving veterinarian should limit services to those related to the problem for which the horse was referred. Additional services should be provided only when they are in the best interest of the patient and after consultation with the referring veterinarian. All parties should work together to formulate a follow-up treatment and evaluation plan for the patient that can be implemented effectively and economically. It is the responsibility of the owner to clearly determine and communicate who is legally and financially responsible for the horse and assure that this individual or their legal proxy is available for decision-making during the referral visit and at the time of patient discharge.

## **After Referral**

At the time of discharge of the patient from their care, the receiving veterinarian should ensure that all relevant medical information and instructions for patient care are clearly communicated to the referring veterinarian. In most cases the referring veterinarian will then resume responsibility as the attending clinician for the patient. That individual is responsible for agreed-upon follow-up care as described in discharge instructions. The receiving veterinarians should be informed of the results of follow-up evaluation and care. It is the responsibility of the owner to comply with all discharge instructions to the best of their ability and to communicate in a timely way with veterinarians if they are unable to comply with the instructions and to meet all financial obligations incurred with all involved parties.

## **Conclusions**

For all equine patients, effective communication between referring and receiving veterinarians, clients, farm managers, trainers, and insurance agency representatives is essential to ensure optimal patient care. Despite the best efforts of all involved, there will be times when communication is less than optimal or when difficult information must be discussed. Referring and receiving veterinarians are encouraged to seek training to develop communication skills through any of a wide variety of excellent public and private resources. This type of training is especially beneficial for young professionals at the beginning of their veterinary career.