

Tool 2.9: Case Presentation Overview with Examples

Case Presentation Skills

September 9, 2011
Breast Navigators

Overview

- Define case presentation
- Know your audience: Presentation goal varies on audience
- Case presentation examples

Learning Objective (Skills)

- Understand the components of a good case presentation
- Understand how to present to:
 - Provider
 - Clinical Supervisor
 - PN Group (training) meetings
- Understand key information needed for each group audience

Defining Case Presentation

- Define: How would you define case presentation? (PN defines)
 - Share important patient clinical information for further clinical steps
 - Important skill used in medical job settings working directly with patients
- When should this skill be used?
 - Understand what next clinical steps are needed
 - Understand how to coordinate patient care
 - Share interesting navigated case with non-clinical group
 - Problem solve difficult cases

Key Information Needed

Non-Clinical	Clinical
Age	Screening test done <ul style="list-style-type: none">- Date- Abnormal result
Race/Ethnicity	Last test done (may be the same as above) <ul style="list-style-type: none">- Date- Result
Language concerns	Next scheduled appointment
Other personal issues <ul style="list-style-type: none">- Possible abuse- Death in the family- History of DNKA	Comorbidities

Remember the Four C's of Presenting

- Consistent
 - Use the same format for each presentation
- Clear
 - Be specific and direct
- Concise
 - Summarize
- Coordinated
 - Be prepared – know/have on hand lab results, what steps you've already taken, etc

Presenting to Providers

Provider→

- How do you identify a case that needs to be presented to a provider?
- How do you currently present a case to a provider?
- What is your end goal of this interaction?

Note:

- Always think about why you are presenting this case
- What information do **you** need from the person you are presenting in order to navigate a patient?

Provider→ Need information about the patient's follow up plan (develop patient's individual action plan)

Presenting to Clinical Supervisors

Clinical supervisor→

- How do you identify a case that need to be presented to a clinical supervisor?
- How do you currently present a case to a clinical supervisor?
- What is your end goal of this interaction?

Note:

- Always think about why you are presenting this case
- What information do **you** need from the person you are presenting in order to navigate a patient?

Clinical Supervisor→ Need more information about how to navigate patient's follow up plan, i.e. track to resolution

Presenting to PN Group Meetings

PN Training Meetings→

- How do you identify cases that need to be presented to a PN Training Meetings?
- How do you present a case currently to a Training Meetings?
- What is your end goal of this interaction?

Note:

- Always think about why you are presenting this case
- What information do **you** need from the person you are presenting in order to navigate a patient?

PN Training Meetings→ Share interesting navigated cases with non-clinical group or help problem-solving/resource sharing; Receive input from other navigators; Ask questions of PN staff

Provider

Case Summary

"Hi Dr Jones. I wanted to talk with you about Ms. H, a 50 year old Korean woman you saw on 8/20. She had an abnormal mammogram on 8/20, the result was BIRADS 5. She also has a fractured ankle and is using crutches. She's leaving on September 12 to go to Korea, and will be there until November 5 for her niece's wedding. She has a follow up orthopedist appointment with Dr. Larry at BMC on 11/16. What is the follow-up plan?"

What is the Key Information?

- Ask yourself what is key for providers to help you figure out what you need?
- How to present the case effectively to a provider if you only see them one a week?
- What is the important information that you want to share?
- What is the most common terms discussed in you interaction with providers (ex. last date seen in clinic, results BIRADS 0, 3,4,5; diagnostic test; have lab results on hand)
- **Remember Provider→** Need information about the follow up plan (develop patient's individual action plan)

How to Case Present to a Provider

Patient: 50 yrs, Korean, Female, English speaking
Mammography Date & Result: 8/20; BIRADS 5
Comorbidity: Fractured Ankle, on crutches
Next Scheduled Appt: 11/16 with orthopedics for her ankle
Other Information (Barrier): Patient will be in Korea from 9/12 – 11/5

Does this information meet the goal of: Finding out what this patient's clinical follow up plan is?

Presentation Goal for:

1) **Providers**

- To get an individual clinical follow up plan for the patient

Clinical Supervisor

Case Presentation – Clinical Supervisor

"Hi Jane. Can I discuss Ms H's case with you? She's a 50 year old Korean patient of Dr Jones. She had a mammogram on August 20 that was a BIRADS 5. She also has a fractured ankle. Ms Han was leaving on vacation to Korea for two months starting September 12. She has an orthopedist appointment scheduled for November 16 and wanted to have her biopsy the same day. Dr Jones wanted her to have her biopsy done before she left for Korea. I scheduled a breast biopsy appointment on September 9, and arranged for the RIDE to provide transportation since she is on crutches, but she DNKA'd that appointment. Spoke with daughter who stated that patient has already left for Korea, and will return on November 5. My concern is that she will now have a 3 month delay in care. What is my next step to navigate this patient? When should I try to schedule her appointment? If on the same day (11/16), how can we help her get from one building to the other with her crutches?"

What is the Key Information?

- Ask yourself what is key for you to receive the most guidance with from your clinical supervisor?
- How to use her time effectively, if you only see supervisor one a week?
- What is the important information that you want to share?
- What is the most common terms discussed in your meeting with your clinical supervisor (ex follow-up plan, coordinating care, radiology appointment openings etc.)
- **Remember Clinical Supervisor** → Need more information about how to navigate patient's follow up plan, i.e. track to resolution of abnormality

How to Case Present to Clinical Supervisor

Patient: 50 yrs, Korean, Female
Result/Index Abnormality: BIRADS 5 (8/20)
Clinical Follow Up Plan: Biopsy ASAP
Comorbidity: Fractured Ankle, on crutches (11/16 appt for F/U)
Barriers: Transportation; Medical and Mental comorbidity; Out of town/country; Other: DNKA
Actions: Arrangements; Scheduling Appointment
Problem: Pt DNKA for scheduled biopsy (9/9) and is now in Korea until 11/5.
Does this information meet the goal of: How to continue with this patient's individual action plan, i.e., track to resolution. When should I reschedule her biopsy? How can I get her from biopsy to orthopedics with her fractured ankle?

Presentation Goal for:

- 1) Providers
 - To get an individual clinical follow up plan for the patient
- 2) **Clinical Supervisors**
 - To get help accomplishing the clinical follow up plan for the patient (i.e. to resolution of abnormality)

Patient Navigator Group Meetings

Case Presentation – PN Group

"Hi Everyone. I want to share a difficult case with you. Ms. H is a 50 year old Korean patient who's index abnormality was a BIRADS 5, and she had a fractured ankle. When we received her mammogram results on 8/31, she was three weeks away from a trip to Korea for two months for her niece's wedding. She had an orthopedist appointment on 11/16 at the hospital scheduled for after her return from Korea. Dr Jones wanted to get her in for a biopsy before she left, but Ms H was unable to walk to the T, and said she didn't have anyone to bring her. She wanted to know why we couldn't schedule it for 11/16 since she already has that day off from work, transportation scheduled, and will already be at the hospital. She was also worried about not being able to wear something nice for the wedding after the biopsy scheduled an appointment for her for her on 9/9 at her most convenient time. I called the RIDE and they were able to pick her up and drop her off. Unfortunately, Ms H DNKD'd her biopsy appointment, and after speaking with her daughter learned she had already left the country ..."

Case Presentation – PN Group

"...I brought this case to Jane, my supervisor, to get advice on how to proceed since Ms H wouldn't be back in the country until 11/5. Jane suggested scheduling an appointment for 11/16, since Ms H was going to be here for her orthopedist appointment. I was also concerned about Ms H being able to get from her biopsy to the orthopedist, as they are in different buildings and Ms H isn't able to walk well due to her crutches. Jane suggested I contact the hospital's patient transport department, and they agreed to transport between her appointments. I left a message for Ms H about her new appointment. I also called Ms H on 11/7 to talk about her upcoming appointments, and to find out if there was anything else I could do to help her. I arranged for RIDE to bring her to her biopsy, and her son was already planning on picking her up after her orthopedist appointment. In the end, she made it to both of her appointments, and her biopsy was negative for cancer."

Case Presentation – PN Group

- How is this presentation different from the previous two (provider and clinical supervisor)?
- What is the most common terms discussed in our meetings (ex index abnormality, screening, resolution, action, barriers etc.)
- **Remember PN Group Meetings** → Share interesting navigated cases with non-clinical group

How to Case Present to PN Group

Patient: 50 yrs, Korean, Female
Index Abnormality & Dates: BIRADS 5, 8/20
Other Relevant Lab Results: Fractured Ankle (on crutches)
Barriers: Transportation; Medical and Mental comorbidity; Out of town/country; Other: DNKA
Actions: Arrangements; Scheduling Appointment
Resolution: Biopsy negative for cancer

Does this information meet the goal of: Sharing this interesting case and how I was able to resolve it with other navigators?

Presentation Goals for:

- 1) Providers
 - To get an individual clinical follow up plan for the patient
- 2) Clinical Supervisors
 - To get help accomplishing the clinical follow up plan for the patient (i.e. to resolution of abnormality)
- 3) **PN Group meeting**
 - To share interesting cases and difficult barriers and how you overcame them with other navigators – we want the whole story!

Summary

Presentation Goals

- 1) Providers
 - To get a medical action plan for the patient
- 2) Clinical Supervisors
 - To get help accomplishing the medical action plan for the patient
- 3) PN Group
 - To share interesting cases and difficult barriers and how you over came them with other navigators – we want the whole story!

Key Points

- You won't always present the same case to all three audiences – every case is different!
- Keep the goal of the case presentation in mind – it'll help you stay focused!
- It takes practice to be comfortable – don't be hard on yourself, and practice!
- Be Consistent, Be Clear, Be Concise, and Be Coordinated!

Group Exercise: Ms. Wendell

Put Skills Learned Into Practice!

- Review Ms. Wendell's case and present for three different audiences
 - Provider
 - Clinical supervisor
 - PN training meetings

Case Presentation Example

- Ms. Wendell is a 36 year old Haitian woman with a BIRADS 4 mammogram. Dr McDonald is away on vacation and does not know anything about this case & you don't know if anyone has done anything with this case

→ You start navigating

Remember the Four Principles of Navigation

1. Case Identification
2. Identify individual barriers to care
3. Develop an individual plan for the patient to address barriers to care
4. Tracking to resolution of abnormality

Case Presentation Example, cont.

- PCP is concerned about her weight and that she is taking insulin
- She speaks English, but that she is more comfortable speaking Creole
- You do not speak Creole and the Creole interpreter is unavailable for the next three weeks
- The three Creole speaking staff are on summer vacation
- Who would you present this case to first (Provider, Clinical Supervisor or PNRP group)? What concerns would you bring to each group?

PNRP Case Presentation

Age/Race: _____
Referral Reason: _____
Result: _____
Abnormality Date: _____

Notes: _____

Plan: _____

Barriers	Actions	Time
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Future Meetings

- Discuss how your case presentation skills are being used with your provider or clinical supervisor
- Be prepared to present one of those cases to us, and to talk about how your interaction with providers has been going
- Use the Case Presentation form to help you with gathering information for your presentation

Any Questions, Comments?

Thanks!