

How to Present a Patient Case

Busy Day Tool Kit Preceptor Instructions

Learner level: IPPE and APPE Students

Estimated time to complete: Completion of this module will take approximately 15 minutes. Additional time (a few hours) will be required for the student to develop the patient case presentation. Development of the patient case presentation may be done intermittently while completing other assigned projects.

Preceptor Instructions: Ask the student to thoroughly review the module. Check in with the student to see if there are questions or topics needing clarification. Upon completion, have the student practice their skills by developing and presenting a patient case. Ask the student which portions they thought were most useful and/or informative.

Student Instructions: Thoroughly review the information contained in the module. Then, apply what you learned by developing and presenting a patient case. Provide feedback to your preceptor about the topics/activities you completed.

How to Present a Patient Case

Learning Objectives

1. Define a patient case presentation
2. List the typical information included in a patient case presentation
3. Describe the usual format and organization of a patient case presentation
4. Discuss the use of critical thinking and communication skills to successfully present a patient case

What is a Patient Case Presentation?

A patient case presentation is a demonstration of a learner's knowledge and skills related to the management of disease states and drug therapies through application to an actual patient case.

Typical Information Included in a Patient Case Presentation

1. Patient information: subjective & objective
2. Patient's clinical course
 - a. e.g. hospital course, outpatient disease progression over time
3. Summary of the disease state and management (discussion)
4. Your assessment and plan for the patient
5. Patient's actual treatment and outcome
6. Summary of case & takeaway points

Patient Information*

Demographics (age, race, sex)	Review of Systems (ROS) (pertinent positives & negatives)
Chief Complaint (CC)	Physical Examination (PE), including vitals (pertinent positives & negatives)
History of Present Illness (HPI)	Laboratory results (pertinent positives & negatives)
Past Medical History (PMH)	Diagnostic test results (pertinent positives & negatives)
Social History (SHx) (may include activities of daily living, health beliefs, & health literacy)	Allergies & ADRs
Family History (FHx)	Comprehensive medication list (Rx & OTC)

*Not an all-inclusive list. All items may not be required in all patient case presentations.

Clinical Course

1. Details related to the patient's clinical condition and progression over time
 - a. Timeframe used should be appropriate for the disease state and presentation requirements
2. Factual information (no assessment yet)
3. Presented in chronological order

Disease State & Management Summary

1. For the patient's primary disease state(s):
 - a. Etiology, pathophysiology, typical type of patient affected
 - b. Typical physical & laboratory findings
 - c. Typical disease course & prognosis
 - d. Goals of therapy
 - e. Evidence-based management strategies
 - f. Approach to individualizing therapy & special patient populations
 - g. Clinical pearls

Assessment

1. Prioritize the patient's problems
2. State (or re-state) the patient's goals of therapy
3. Compare the patient's clinical condition to their goals of therapy
 - a. Connect patient's subjective and objective information to your assessment
4. State whether the disease state(s) is(are) at goal
5. Outline medication-related problems with description and cause

Plan

1. Your individualized, evidence-based plan for the patient's disease state(s) and drug therapy(ies)
 - a. Should consider all relevant patient factors (health beliefs & literacy, adherence & barriers, cost, etc.)
 - b. Should include pharmacologic & non-pharmacologic therapies with your rationale
2. The plan should include any necessary patient/caregiver education and/or referrals
3. The plan should include follow up: who/what/when

Patient's Treatment Course and Outcome

1. Describe the patient's actual disease and treatment course and outcome(s)
2. Compare/contrast the actual treatment course with your recommended therapy
 - a. Discuss reasons for differences that exist
 - b. Propose strategies to improve management in the future (if appropriate/applicable)

Case Summary

1. Summarize the major points of the case
2. Provide a limited number (e.g. 3) of takeaway points for the audience
3. Tailor summary and takeaway points to your audience

Critical Thinking Skills

1. Successful patient case presentations:
 - a. Integrate disease and drug knowledge, clinical evidence, and patient factors
 - b. Anticipate medication-related problems and recommend preventative strategies
 - c. Consider "what if" scenarios and provide alternative therapy approaches
 - d. Are presented in a logical order and tell a cohesive story

Verbal Communication

1. Style
 - a. Clear, organized, connected
 - b. Scientific/formal/respectful language used
 - i. Appropriate for audience educational level
 - c. Minimal distracting mannerisms (e.g. "um")
 - d. Engaging to audience
 - i. May also consider including audience participation
2. Tips
 - a. Practice your presentation before delivering it!
 - b. Know your information well so you don't have to rely heavily on notes during questions

Written Communication/Visual Aids

1. Style
 - a. Organized, sensible flow, appropriate headings and sub-headings, complete yet concise
 - b. Professional language used
 - c. Free of spelling and grammar errors
 - d. Format appropriate for audience
2. Tips
 - a. Proofread and edit your presentation prior to submission!
 - b. If using visual aids, view them from the audience perspective prior to delivering presentation

Additional Helpful Hints

1. Always maintain professionalism in demeanor, appearance, and communication
2. Format and structure of case presentations may vary, so be aware of your requirements and your time limit
3. Tailor the presentation to your audience!
4. Be prepared to think on your feet!

References

1. American College of Physicians (ACP). Presenting a clinical vignette: deciding what to present. Available at: <https://www.acponline.org/membership/residents/competitions-awards/acp-national-abstract-competitions/guide-to-preparing-for-the-abstract-competition/presenting-a-clinical-vignette-deciding-what-to-present>. Accessed January 21, 2019.
2. Assa-Eley MT, Ward CT. Communication: An Overview. In: Nemire RE, Kier KL, Assa-Eley M. eds. Pharmacy Student Survival Guide, 3rd ed. New York, NY: McGraw-Hill; 2014.
3. Cipolle RJ, Strand LM, Morley PC. Acquiring and applying the knowledge and clinical skills required to manage drug therapy. In: Cipolle RJ, Strand LM, Morley PC. eds. Pharmaceutical Care Practice: the Patient-Centered Approach to Medication Management Services, 3rd ed. New York, NY: McGraw-Hill; 2012.
4. Grant A, de Val J. How to make an oral case presentation to healthcare colleagues. The Pharmaceutical Journal 2016;296(7887): DOI: 10.1211/PJ.2016.20200876.
5. Joint Commission of Pharmacy Practitioners. Pharmacists' Patient Care Process. May 29, 2014. Available at: <https://jcphp.net/wp-content/uploads/2016/03/PatientCareProcess-with-supporting-organizations.pdf>. Accessed January 21, 2019.