

Case Presentation Instructions and Evaluation Form

Description

As part of the Advanced Pharmacy Practice Experiences (APPEs), each student is required to complete a formal case presentation. Each student will present one (1) patient case encountered during one of the following rotations:

1. APPE 451: Acute Care General Medicine
2. APPE 453: Community Pharmacy Practice
3. APPE 455: Longitudinal Ambulatory Care
4. APPC 456 – 490: Patient Care Selective

Students will present formally to faculty and peers a patient case that they have been actively involved with during one of the rotations listed above. Students will be required to attend three (3) sessions including the one in which they will present. These sessions can be scheduled during any rotation; however, students will be scheduled to present only while assigned to one of the above listed rotations. The location of the rotation will be considered when scheduling students for attendance. Attendance and participation are REQUIRED and contribute toward the student's ability to pass this component of the APPE Graduation Requirements.

The goals of the case presentation sessions are to: 1) provide students with the opportunity to develop skills to present patient-specific information in a logical and systematic manner, 2) design specific therapeutic goals, regimens and monitoring plans for a **single** patient problem, incorporating evidence based medicine, 3) provide students constructive feedback on their approach to patient management, and 4) provide students constructive feedback on their approach to oral and electronic presentation.

During three rotations, students will be assigned to a specific group. The group session assignment will be posted in Blackboard prior to the start of each rotation period. This assignment list will include the presenters for the individual sessions. There will be four (4) thirty minute presentations per session.

Educational Format

1. Responsibilities of all students
 - a. On (or before) the first day of each rotation period, group assignments will be posted in Blackboard under "Course Documents" in the "Case Presentation Materials" folder.
 - b. Students (presenter and participants) in each group will actively participate in their assigned sessions. Students are not permitted to use laptops or cell phones in the audience during presentation sessions. If used, the preceptor has the right to not credit the student's attendance if deemed to interfere with active learning.
 - c. Students should review the learning objectives for the presentations that they will be attending; these will be listed "Group Discussion Board" area in Blackboard. Each student **MUST** ask at least one question during the session that they are attending; this participation is required in order to be counted in attendance. The session leaders will regulate the number of questions asked to each presenter. Therefore, students' questions to presenters will be spread out during these sessions.

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- d. The interaction between the session leader, presenter, and participants will be limited to 30 minutes for each case.
 - e. Each participant will be given credit for attendance and his/her input. Students who fail to attend a session or arrive more than 15 minutes late for their session will be marked as an unexcused absence. Determination of unexcused versus excused absence will be made by the Experiential Learning Office or their designee(s) on a case by case basis. Students who are unable to attend their assigned session must contact the Experiential Learning Office via email (elp@rx.umaryland.edu) within 96 hours PRIOR to the session.
 - f. Students who are assigned to patient care rotations on the Eastern Shore, Western Maryland, or outside the State of Maryland will be scheduled at a time when they are completing a rotation closer to the School of Pharmacy Baltimore or Shady Grove campuses.
 - g. All students **must** dress in appropriate professional attire. Students who arrive at the session not dressed in professional attire will not be allowed to participate and will have the session counted as an unexcused absence.
2. Responsibilities of presenting students
- a. Four students in each group will be required to formally present a case presentation during their designated group session.
 - b. Students who are required to present will be clearly identified on the group roster (e.g. "Presenter").
 - c. Over the course of the APPEs, each student will be required to give at least one (1) presentation.
 - d. Students who are presenting a case must post two (2) learning objectives for their case on Blackboard under the appropriate faculty or preceptors' section in the "Group" folder in the group's "Group Discussion Board". Learning objectives must be posted to the appropriate forum in the assigned group no later than 72 hours prior to the scheduled session. For example, if a presentation is scheduled for Friday at 9 am, the objectives must be posted to Blackboard by the previous Tuesday at 9 am.
 - e. The presenting student must email his/her electronic slide presentation to the instructor no later than 72 hours prior to the presentation. For example, if a presentation is scheduled for Friday at 9 am, the presentation must be sent to the instructor by the previous Tuesday at 9 am. This file will be used the day of the presentation. Students will NOT be permitted to bring a copy of their slides to the session the day of the presentation. The document should be named: "lastname_firstname_casestudy."
 - f. Presenters who do not post their learning objectives or submit their electronic slide presentation by the required time (e.g. no later than 72 hours prior to the beginning of the case presentation session) will earn a "Significant Deficiency" for the "Overall Organization/Presentation" component of their evaluation.
 - g. Case Requirements: see below
 - h. The case presentation will be evaluated by the session leader (see the attached evaluation instrument). The evaluations forms for the case presentations are available in Blackboard. Students will earn either a pass or a fail based on the criteria in the evaluation tool. Students who do not pass their first presentation must repeat the

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presentation. Students who are absent (unexcused) when assigned to give a case presentation will receive an automatic failure.

3. Case Requirements

- a. The case presentation must not contain patient identifiers.
- b. Students may select any patient they wish to present from their APPE 451, APPE 453, APPE 455, or APPC 456 – 490 rotations and meet the following criteria:
 - Patients presented **MUST NOT** be employees of the site or family members.
 - Patients selected to be presented must have at least one (1) active problem requiring pharmacological therapeutic intervention.
 - Students presenting cases that do not meet these minimum requirements, as determined by the session leader, will receive a failing grade for their presentation.
- c. Each student will conduct a 20-25 minute oral presentation. The data will be presented using electronic slides. There will be three parts to this presentation. A general breakdown of time is provided. Please see **Appendix A** for further details of the required presentation content.
 - Presentation of the case: 5 minutes, maximum
 - Discussion of the topic: 15 minute, maximum
 - Conclusion and summary: 5 minutes, maximum
 - Question and answer: 5 minutes **MUST** be allotted. Be prepared to answer questions and discuss your plan of care. The student is expected to be able to discuss ANY active medical problems for the patient during the question and answer portion of the program.

4. Responsibilities of the Session Leader (faculty or preceptor)

- a. The session leader will have the presentation loaded onto the computer the day of the presentation.
- b. **The session leaders will regulate the number of questions asked to each presenter.**
- c. The presentation leader will randomly call on group participants.
- d. The interaction among the session leader, presenter, and participants will be limited to 30 minutes for each case.
- e. The case presentation will be evaluated by the session leader (see the attached evaluation instrument).

Grading

Students will receive a pass/fail grade for the presentation. Refer to the evaluation tool for the case presentation posted in the APPE Blackboard site. Cases not meeting presentation requirements, as described above, or students who do not receive a passing score will be scheduled to present a different case at another presentation session. Students who do not achieve a passing score during their second attempt will be referred to the Student Affairs Committee.

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APPENDIX A: Case Presentation Format

Part I: Presentation of the Case (~5 minutes)

This should be in the SOAP format and include the main categories as listed below:

Demographic Data: Age, gender, race, weight, height, and where the patient was encountered.

Chief Complaint: Reason for the patient's presentation for care.

History of Present Illness: Description of the events leading to the patient's presentation to medical care or progression of the disease which will be discussed in detail.

Past Medical History: Brief list of major illnesses, surgeries, and previous hospitalizations that have a direct effect on the patient's present illness.

Medications, Allergies / ADR's: Obtained during your medication history and supplemented with review of the patient's medical or medication records, prescription profiles, care givers and other sources as required.

Social History: Including quantitative statements when indicated (e.g. smoking, alcohol, IVDA).

Family History: Include only pertinent family history details.

Review of Systems: Pertinent negatives as well as pertinent positives for the patient's current problems. Systems related to the chief complaint should be listed in the HPI.

Physical Examination: Pertinent negatives as well as pertinent positives for the patient's current problems.

Laboratory data: Pertinent negatives as well as pertinent positives for the patient's current problems.

Part II: Discussion of Topic (15 minutes)

Pharmaceutical Care PROBLEM LIST and discussion of main problem

1. Prioritize the active medical problem list from the most severe to the least severe problems
2. Short discussion of **selected problem (i.e. one of the problems requiring a change in drug therapy)** including:
 - a. Epidemiology
 - b. Pathophysiology
 - c. Pertinent assessment or diagnostic criteria
 - d. Disease state complications
 - e. Treatment strategies – be sure to review all possible treatment options
 - i. Patient and agent related variables
 - ii. Brief of guidelines or primary literature, if applicable
 - f. Goals of therapy

This can be presented in a variety of ways. The focus should be on drug therapy. Use of primary literature regarding drug therapy is required. This information should be linked back to the case as much as possible (include specific examples where there are similarities or differences between the case and the literature).

Part III: Conclusion and Summary (5 minutes)

1. The student will present the following:
 - a. Conclusions should be in the form of a firm stance or opinion about the problem.
 - i. The student's treatment recommendations, including rationale for selecting that therapy using primary literature and/or guidelines.
 - ii. A critique and/or justification of the actual treatment recommended to patient using primary literature.
 - b. Monitoring parameters for the selected problem

APPE Case Presentation Evaluation Form

STUDENT: _____ DATE _____

EVALUATOR: _____

Key: EC=Exceeds Competency MC=Meets Competency SD=Significant Deficiencies

Overall Organization/Presentation		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> EC	As in MC, and ALL of the following: <input type="checkbox"/> Case was presented in the recommended sequence without inappropriate deviations <input type="checkbox"/> Presentation was primarily presented from memory with only minor reliance on notes <input type="checkbox"/> No distracting mannerisms were noted	
<input type="checkbox"/> MC	ALL of the following: <input type="checkbox"/> Case was generally presented in the recommended sequence <input type="checkbox"/> Case presentation was within the allotted time (≤ 5 minutes) <input type="checkbox"/> Topic presentation was within the allotted time (≤ 15 minutes) <input type="checkbox"/> Slides were well organized and complemented presentation <input type="checkbox"/> References were in the correct format (Shapiro AMJ, Lakey JRT, Ryan EA, et al. Islet transplantation in seven patients with type 1 diabetes mellitus using a glucocorticoid-free immunosuppressive regimen. N Engl J Med 2000;343:230-8. ; Goadsby PJ. Pathophysiology of headache. In: Silberstein SD, Lipton RB, Dalessio DJ, eds. Wolff's headache and other head pain. 7th ed. Oxford, England: Oxford University Press, 2001:57-72.)	
<input type="checkbox"/> SD	Any of the following: <input type="checkbox"/> Case was so disorganized and deviated so much from the recommended sequence that the listener(s) could not follow the pertinent information <input type="checkbox"/> Overall presentation was longer than allotted time (25 minutes) <input type="checkbox"/> Multiple spelling errors in slides <input type="checkbox"/> Final recommendation not given <input type="checkbox"/> Learning objectives not posted and/or slides not emailed to the instructor on time (ie. No later than 72 hours prior to the scheduled presentation date and time). <input type="checkbox"/> Patient identifiers were used during presentation <input type="checkbox"/> Professional attire was NOT worn	

Part 1: Case Presentation

Performance Level	Performance Criteria	Comments
<input type="checkbox"/> MC	The student presents ALL of the following: <input type="checkbox"/> Chief complaint (in patients own words if possible) and includes the patient's initials, age, gender, race, and chief complaint/reason for the encounter.	

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	<input type="checkbox"/> History of present illness: : Description of the events leading to the patient's presentation to medical care or progression of the disease which will be discussed in detail. This includes symptom analysis, historical context of the problem, related medical/social/family history items, and related ROS findings, <input type="checkbox"/> PMH: Brief list of major illnesses, surgeries, and previous hospitalizations that have a direct effect on the patient's present illness. <input type="checkbox"/> Medication history: Obtained during your medication history and supplemented with review of the patient's medical or medication records, prescription profiles, care givers and other sources as required. Must include drug allergies and history of significant ADR's. <input type="checkbox"/> FH/SH: SH should include quantitative statements when indicated (e.g. smoking, alcohol, IVDA). Include only pertinent family history details. <input type="checkbox"/> ROS: Pertinent negatives as well as pertinent positives for the patient's current problems. Systems related to the chief complaint should be listed in the HPI. <input type="checkbox"/> Physical exam data: Pertinent negatives as well as pertinent positives for the patient's current problems. <input type="checkbox"/> Laboratory data: Pertinent negatives as well as pertinent positives for the patient's current problems <input type="checkbox"/> Problem list is prioritized from most severe to least severe	
<input type="checkbox"/> SD	Student is missing one or more of the items listed above	

Part 2: Discussion of the topic

Topic Discussion		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> EC	As in MC and: <input type="checkbox"/> Summarizes guidelines or primary literature, if applicable	
<input type="checkbox"/> MC	ALL of the following: <input type="checkbox"/> Provides concise summary of epidemiology, pathophysiology, pertinent assessment of diagnostic criteria, disease state complications <input type="checkbox"/> Provides treatment strategies for specific problem <input type="checkbox"/> Lists objectives of therapy	
<input type="checkbox"/> SD	<input type="checkbox"/> Criteria for MC not met	

Part 3: Treatment Recommendation/Summary

Treatment Recommendation		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> EC	As in MC, and ALL of the following: <input type="checkbox"/> Provides a justification for specific drug therapy recommendations using primary and/or secondary literature. <input type="checkbox"/> Recommendation includes non-pharmacological recommendations, if appropriate <input type="checkbox"/> Only includes monitoring parameters that are discriminating measures of efficacy and toxicity for the recommendation	

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Treatment Recommendation		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> MC	ALL of the following: <input type="checkbox"/> Student states specific drug therapy recommendations (generic name, dose, route of administration, dosing frequency and duration (if < 1 year) that is likely to have a positive effect on the patient's health and well being for selected problem <input type="checkbox"/> Lists specific and measurable parameters (subjective and objective) that enable the practitioner to assess for efficacy and toxicity of the recommendation <input type="checkbox"/> States patient and agent related variables (comparative efficacy, safety, cost, and convenience) present in the case that impact choice of the drugs and/or drug classes being considered for at least the problem presented <input type="checkbox"/> Includes a frequency of monitoring for each parameter that is consistent with product labeling, standards of care, and/or the severity of the problem	
<input type="checkbox"/> SD	<input type="checkbox"/> Criteria for MC not met <input type="checkbox"/> Recommendation is unlikely to improve the patient's health & well-being <input type="checkbox"/> Rec. likely to significantly worsen patient's health and/or well-being	

Actual treatment critique/evaluation		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> EC	As in MC, and either of the following: <input type="checkbox"/> Provides a critique or evaluation for the implemented treatments using primary or secondary literature <input type="checkbox"/> Thought process is discussed to illustrate that the recommendations are individualized for the case considering PMH, SH, FH and other patient related variables.	
<input type="checkbox"/> MC	Either of the following: <input type="checkbox"/> Reports the actual treatment given to the patient or reports that no treatment was given <input type="checkbox"/> Discusses why recommended treatment differed from the actual implemented treatment or why a treatment recommendation was not able to be implemented	
<input type="checkbox"/> SD	<input type="checkbox"/> Criteria for MC not met	

Summary/Synthesis Statement		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> EC	<input type="checkbox"/> Provides a concise summary/synthesis statement that clearly demonstrates the presenter's thoughts and rationale regarding the case without repeating data	
<input type="checkbox"/> MC	<input type="checkbox"/> Provides a summary/synthesis statement that attempts to convey the presenter's thoughts and rationale regarding the case and the primary issue, but may have some difficulty in fully synthesizing and explaining findings	
<input type="checkbox"/> SD	<input type="checkbox"/> Criteria for MC not met	

Responses to Questions (NOTE: questioning can pertain to any of the patient's medical problem)		
Performance Level	Performance Criteria	Comments
<input type="checkbox"/> EC	<input type="checkbox"/> Student responds to >90% questions without assistance from instruction or	

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Responses to Questions (NOTE: questioning can pertain to any of the patient's medical problem)		
Performance Level	Performance Criteria	Comments
	recitation participants.	
<input type="checkbox"/> MC	<input type="checkbox"/> Student responds to >50% questions without assistance from instructor or recitation participants.	
<input type="checkbox"/> SD	<input type="checkbox"/> Criteria for MC not met	

Scores:

“EC” rating = 10 points

“MC” rating = 8 points

“SD” rating = 0 points

Maximum Total Points = 70

Pass score = \geq 45 points

Case Requirements Met: Yes / No (Cases not meeting requirements result in an automatic failure.)

Total Points: _____

PASS / FAIL

Comments: