

# Medical Complexity Case IPE Facilitator Guide

## Color key for using this guide:

Black ink- general information, background and/or directions

Red color- Important information

Red color with yellow highlight: The answers to the questions

Green color-teaching tips you may or may not want to use.

*Dear Volunteer Faculty,*

*Thank you for participating in our IPE small group discussion. Your role as the small group facilitator is to 1) lead the learners through an interdisciplinary patient case, 2) promote discussion among the group, and 3) obtain student evaluations at the end of the case.*

## **IPE Objectives:**

CC2: Communicate information with patients, families and healthcare team members in a form that is understandable, avoiding discipline-specific terminology when possible.

CC4: Listen discuss, and encourage ideas and opinions of other team members

CC7: Recognize how one's own uniqueness, including experience level, expertise, culture, power, and hierarchy within the healthcare team, contributes to effective communication, conflict resolution, and positive interprofessional working relationships.

CC8: Communicate consistently the importance of teamwork in patient-centered and community-focused care.

## **Medical Knowledge Objectives:**

Understand that patients with physical disabilities may or may not have intellectual disabilities and assess intellectual ability in a clinical encounter

Explain how the physical exam of a patient in a wheelchair may differ from the physical exam of a patient without a wheelchair.

Define the term "durable medical equipment" and compare what is ordered from a pharmacy and what is ordered from a DME company.

## **Administrative:**

At each session we may have a variety of healthcare learners present. This may include medical students, residents, fellows, PA students, nursing students, medical assistant students, social work students.

## **Agenda:**

10 mins Intro and Icebreaker

35 mins Case discussion

10 Evaluation, attendance and wrap up and dismiss.

## **I. Introduction and Icebreaker: Approximate time 10 minutes**

1. Introduce yourselves and the overall goal of the session. You can read the statement below or state in your own words.

*The overarching goal is to prepare learners to work as a team in a clinical encounter with a patient that is wheelchair dependent, has medical complexity and multiple equipment needs.*

2. Ask students to introduce themselves to the group by sharing the following:

- a. Name and school (type of training), where they grew up, and why they chose their field.

## **II. Case Discussion: Approximate time for case 35 minutes**

**A. Facilitators may read this case, or they may ask a student to volunteer to read the following paragraphs:**

Carolyn is a 24-year-old female who presents to your primary care office to establish care. She is accompanied by her grandmother, who has cared for her since she was one year old, and her home health nurse. She has a diagnosis of spastic quadriplegic cerebral palsy and uses a custom wheelchair for ambulation outside the home. She also has multiple pieces of medical technology including a baclofen pump, a gastrostomy tube, and a VP shunt. The medical assistant prepares to get the patient's vital signs and wonders how she should obtain her weight.

*Discussion: Before moving to the discussion, invite students to ask questions if they have questions about anything. Encourage students to answer any of the questions that arise, but if no one responds, provide the answers.*

*Questions for Discussion with answers highlighted in yellow:*

1. *How do you feel after hearing the initial part of this case?*
  - a. *Lots of answers possible – overwhelming, sounds really complicated, not sure what all of those terms mean*
2. *What are some options for weighing this patient?*
  - a. *Hoyer lift*
  - b. *Wheelchair weight with patient and without, if you have a wheelchair scale*
  - c. *Parent picks up and lifts*
  - d. *Patient sits on a scale*

The provider enters the exam room and finds Carolyn sitting in her wheelchair. The provider starts asking grandma about Carolyn's medical history and finds that Carolyn speaks up and begins answering questions. She has difficulty speaking, but the provider understands most of what she says. The provider also finds out that she was in special education classes in high school.

3. *How do you feel after hearing this part of this case?*
  - a. *Same answers as above, perhaps also feeling bad for assuming she couldn't talk*
4. *How do you assess intellectual disability in a clinical encounter?*
  - b. *Expressive ability (whether verbal or with a communication device)*
  - c. *Can they follow commands, single/multi-step*
  - d. *Facilitator could show Vanderbilt IDD toolkit if time*
  - e. *Ask to see any neuropsychiatric testing the patient may have had*
  - f. *It may take multiple visits to understand the patient's functional strengths and areas where they need help.*

5. *What questions could you ask Carolyn to better understand her functional status?*
  - g. *Prior information such as IQ or neurocognitive testing*
  - h. *Can they read or do math – at what grade level?*
  - i. *How much help do they need with their daily activities and why do they need the help (mobility or cognitive reasons)*
  - j. *What their current decision-making supports are (guardianship or supportive decision making or neither). However, just because guardianship is in place doesn't always mean that it was granted appropriately!*

After obtaining the history, it's time to examine Carolyn. She has reported a concern about the skin on her lower back/bottom that you want to make sure to look at. In addition, she has a history of constipation, so you think a thorough abdominal exam is important for her as well.

6. *How would you examine Carolyn's bottom and abdomen?*
  - a. *Lay back in chair, move to exam table*
7. *Who should be in the room for Carolyn's exam?*
  - k. *Consider degree of intellectual disability*
    - i. *If no ID, mild ID, or moderate ID discuss with Carolyn, could be with healthcare chaperone such as a nurse or with her caregiver*
    - ii. *If severe to profound ID likely guardian/caregiver present but important to review privacy with Carolyn*
8. *How might Carolyn move from her chair to the exam table?*
  - l. *Hoyer – may be helpful to show pictures to learners*
  - m. *Independent transfer if bed adjustable*
  - n. *Assisted transfer with caregiver carrying her*

*If patients and caregivers are reluctant to move to an exam table for an exam, first attempt to understand their specific concerns and explain the importance of a full exam. Some individuals may not know what a hooyer lift is or how you plan to move the patient, so pictures and details are helpful to review prior to transferring a patient.*

The social work team goes in to meet the family and mom mentions that they need a new g tube ordered, wheelchair modifications, and more diapers to come to their house each month. They also need refills on several of Carolyn's medications.

9. *What is a durable medical equipment (DME) company? How is this different from a pharmacy? Can you think of what you could get at a DME company? What can you get at a pharmacy?*
  - a. *DME companies do not handle medications and carry many medical supplies such as incontinence (diapers, wipes, catheters, pads), mobility (wheelchair, strollers, bath chairs, crutches), feeding supplies (g tubes, formula), and lots of other supplies (tracheostomies, wound care supplies, ventilators, nebulizer machines etc)*
  - b. *Pharmacies carry medication and sometimes basic medical equipment (such as bandages, diapers, basic formula like ensure). Most insurance plans will not cover medical equipment if bought from a pharmacy but would cover it from a DME company.*

Invite any additional questions or comments from students.

### **III. Evaluation, Attendance and Wrap-Up Approximate time 10 minutes**

\*When the session is over (please end promptly), before leaving, ask the students to complete the online evaluations. The student QR code is included in the screen share document.

**Student Survey of the IPE Activity**

\*\*\*\* link and QR code

During that time, please finalize the attendance by noting who came late, left early, or had any other concerns. Also please complete the faculty assessment of the activity using the URL or QR Code below. You will need to enter the student's names and disciplines into the form so keep that information handy.

**Facilitators should complete this form and submit it.**

\*\*\* link and QR code