

# Case-based discussion assessment form



logo placement area

## Candidate and assessor information

Candidate name	Anna Smith	Assessor name	Kichu Nair
Date of assessment	20/2/14	Assessor position	Staff supervisor

## Patient information

Age of patient	34	Patient gender	f	Setting	Emergency department
Patient's problem(s)	Acute appendicitis				

Assessment domains	Below expected level	At expected level	Above expected level
<b>Clinical record keeping</b>	1 2 3	4 5 6	7 8 9
<b>Clinical assessment</b> History and examination	1 2 3	4 5 6	7 8 9
<b>Clinical assessment</b> Differential diagnosis, summary and problem list	1 2 3	4 5 6	7 8 9
<b>Management plan</b> Investigations, treatments, and follow up	1 2 3	4 5 6	7 8 9
<b>Clinical reasoning</b>	1 2 3	4 5 6	7 8 9

**Global rating** Please rate the overall level of performance relative to that expected at PGY1 level.

<b>Global rating</b>	1 2 3	4 5 6	7 8 9
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**Assessor's comments** Please describe what was effective, what could be improved and your overall impression. Must be completed.

- Excellent performance, overall  
 - Clear documentation, integration and assessment (e.g. tachycardia)  
 - Acute and ongoing issues need to be documented  
 - Connect symptoms <--> signs  
 - Document longterm issues/plan

Signature of assessor: XXXXXXXXXXXXX

Date: 20 / 02 / 14

Signature of candidate: XXXXXXXXXXXXX

Date: 20 / 02 / 14

# Information for assessors

## What is a CBD?

A case-based discussion (CBD) uses data recorded by the candidate on a real patient. The candidate will have been involved in the recent management of this patient. A CBD involves a comprehensive review of a patient's clinical situation. The clinical record is a trigger for discussion between the candidate and their trained assessor involving an exploration of the candidate's clinical reasoning.

## How long should it take?

The suggested timeframe is 15 minutes discussion and 10 minutes feedback.

## Tips for conducting the CBD

Potential questions for candidates are italicised

### Introduction

Invite the candidate to give a short summary (less than 2 min), including the rationale.

### Clinical Record keeping

Focus on the relevance, comprehensiveness and quality of note keeping.

- *Does the record encompass all the key features of this clinical encounter?*

### Clinical Assessment: History and examination

History:

- *Tell me what you were thinking about with this patient's presenting problem.*
- *What did you think was the sequence of events or underlying process leading up to the presentation?*
- *What other key problems are also current?*
- *Is the history of these other problems relevant to the presentation?*
- *Is the family history of importance for any of the key problems?*

Examination:

- *Have you examined the key systems relevant to the presenting problem?*
- *What about the findings relevant to the other active clinical problems?*

### Clinical Assessment: Differential diagnosis, summary and problem list

Differential diagnosis, summary and problem list:

- *How did you arrive at the differential diagnosis?*
- *How have you or how would you list the problems in terms of priority?*
- *Are the different clinical problems related in some way?*
- *What are the psychosocial issues here?*

### Management plan: Investigation, treatment and follow up

Investigations:

- *Why did you order these investigations?*
- *How did you interpret the test results?*
- *Were all the tests necessary in cost-benefit terms?*
- *How would the investigation change your management?*

Treatment:

- *Have you described a management plan for each of the key problems?*
- *What was the reason for this therapy written on the treatment chart?*
- *What issues do you consider still need to be resolved?*
- *How was consent obtained?*

Follow up:

- *What are the main considerations in relation to the patient's discharge plan and future health care?*
- *What follow up is necessary? (tests, treatment, duration, rationale)*

### Clinical reasoning

Assessor encourages the candidate to reveal their clinical reasoning:

- *What aspects of this patient's care did you find challenging?*
- *What was your reason for ordering that investigation/treatment/etc.?*

### Global rating

An overall judgement of performance at the expected level.

### Tips for feedback

The feedback needs to be honest and specific to the record presented.

### Candidate is invited to provide initial reflections

- *What do you think went well?*
- *What do you think needs improvement?*

### Assessor identifies the positive aspects of the CBD

- *I thought your history was thorough and comprehensive and your discussion showed a good understanding of the pathophysiological process leading to the presenting problem.*

### Assessor defines key issues raised in the discussion

- *I observed that your record did not include the key element of the relevant prior history leading to the presentation. This was important, wouldn't you agree?*
- *In the examination findings I would have expected to see ... This is important because ...*
- *The examination findings didn't show appropriate assessment of a diabetic patient because ... In my practice, I routinely include ...*
- *The sign ... is a red flag in this presentation because ...*
- *In my opinion the problem list was incomplete and the important current problems of X and Y were not appropriately considered. Would you agree?*
- *Your written management plan was not well developed; this was also reflected in your discussion. I suggest you develop a clear management plan for each patient that you see and discuss it with your senior colleague.*

### Assessor invites candidate to reflect on the issues raised

- *The lack of detail in this patient's recorded history may cause problems if the patient is re-admitted. Can you think of why this may be the case?*
- *We discussed how the absence of key signs may be equally important as positive signs. You may wish to reflect on this for future patients.*
- *How could your problem list have been improved, better prioritised, etc.?*
- *When thinking about a patient's problem list we usually do it in order of priority. Wouldn't you agree?*
- *How could you ensure your record keeping better reflects your clinical reasoning?*

### The assessor discusses with the candidate how to proceed following the discussion

- *What will you include in your action plan based on today's discussion?*
- *I suggest that we include ... in your action plan*

### Assessor completes assessment form

### Candidate and assessor sign form