

**The 13th Annual Ginny Thomas Geriatric Symposium
October 11, 2023**

**Interprofessional Case Study and Roundtable Discussion
Reflection Workbook**

Learning Objectives:

1. Describe the roles and responsibilities of at least five different health professions in the care of a patient with Alzheimer’s disease and related dementias (ADRD)
2. Describe the care partner’s role on the healthcare team for a patient with ADRD
3. List and describe at least three characteristics of a successful interprofessional team

Introduction:

In this 65-minute activity, you will work as a group with individuals at your table, which should include a faculty facilitator, students representing different healthcare professions, and an older adult community member representing the patient’s care partner. (Your table may not have a representative from all these groups, but information will be provided in the packet to help fill in gaps and provide additional information if needed). You should review the learning objectives together and identify a scribe for each table to capture the essence of your discussion for reporting out to the larger group if called upon to do so (blank note paper has been provided at the end of this packet). PLEASE pay attention to the allotted times for each component to be sure you stay on track and are able to cover the case within the expected time frame.

PART 1: Gaining an Understanding of Healthcare Team Members (20 minutes)

Students: introduce yourself briefly and describe your profession and its role as part of an interprofessional healthcare team. Please include specific expertise and training that your profession “brings to the table,” what sets you apart from other professions, in what ways you interact most often with other professions, and any other information you feel is pertinent (NOTE: as students, you may not have a full appreciation for your profession yet, but do the best you can; if there is more than one member of a profession in your group, each should contribute to the discussion). You should fill out the table on the next page as you review this information. If a member of a particular profession is not represented, review the information on pages 3-6 or consult online sources of information. The information provided is NOT comprehensive, feel free to fill in additional details and provide more insights.

- 1) Indicate in the table below if the profession is represented at your table (Y/N)
- 2) Did each of the following professions at your table represent themselves and their profession so that you understood what they do? What questions do you still have?

	YES	NO	Notes about professions:
Nurse			
Pharmacist			
Physician Assistant			
Audiologist			
Counselor			
Dental Hygienist			
Dietician			
Health Educator/Administrator			
Nurse Practitioner			
Occupational Therapist (OT)			
Physical Therapist (PT)			
Psychologist			
Public Health Worker			
Speech-Language Pathologist			
Social Worker			
OT-assistant			
PT-assistant			
Other:			
Other:			

Please reference pages 3-6 in your packet for a brief description of all of the professions who may or may not be at your table. To supplement the discussion if there is additional time, you may even want to discuss perspectives of 1-2 other professions who are not at your table.

Audiologists:

- Diagnose, manage, and treat hearing, balance, and other auditory disorders for individuals across the lifespan, from newborns to the elderly
- Conduct comprehensive auditory evaluations, using specialized equipment and techniques, to determine the nature and degree of hearing loss or balance problems
- Design and implement personalized rehabilitation programs, which may include the selection and fitting of hearing aids, cochlear implants, and counseling on hearing protection, tinnitus management, and communication strategies

Counselors:

- Provide a means for helping clients to learn how to interact constructively with themselves, others, and their environments
- Address the emotional, social, and physical health concerns older adults may have at this particular stage in their lives
- Help people with physical, emotional, and mental health issues improve their sense of well-being, alleviate feelings of distress, and resolve crises

Dental Hygienists:

- Perform comprehensive oral health assessments, including periodontal examinations, oral cancer screenings, and dental charting to identify potential or existing oral health concerns
- Provide preventive dental care through cleaning treatments such as scaling, root planing, and the application of sealants and fluorides
- Educate patients on optimal oral hygiene practices, including proper brushing and flossing techniques, to promote and maintain optimal oral health

Dietitians:

- Assess individual nutritional needs based on health status, lifestyle, and dietary preferences to create personalized nutrition plans
- Analyze the latest nutritional research and translate complex scientific findings into understandable dietary recommendations and guidelines.
- Collaborate with healthcare professionals to manage and prevent diet-related diseases, ensuring patients receive comprehensive and evidence-based nutritional advice.

Health Educators:

- Design, implement, and evaluate community-based education programs aimed at promoting wellness and preventing diseases or health issues
- Provide individuals and communities with the skills and knowledge needed to make informed decisions about their health, lifestyle, and behaviors
- Collaborate with other healthcare professionals, stakeholders, and organizations to develop and promote public health campaigns and interventions tailored to target populations

Healthcare Administration:

- Oversee the daily operations, financial management, and long-term strategic planning of healthcare facilities, ensuring compliance with healthcare laws, regulations, and standards
- Collaborate with medical staff, department heads, and external stakeholders to improve the efficiency, quality, and delivery of patient care services
- Recruit, train, and supervise staff, as well as develop and manage budgets, in order to ensure the sustainability and growth of the healthcare institution

Nurses:

- Assess, plan, implement, and evaluate individualized patient care in diverse settings, ranging from hospitals to community clinics, ensuring optimal patient health and recovery.
- Administer medications, monitor vital signs, and perform procedures like wound care, ensuring safety and adhering to established protocols and standards of care.
- Collaborate with interdisciplinary healthcare teams, provide patient education on various health conditions, and support patients and their families during both health and illness episodes.

Nurse Practitioners:

- Conduct comprehensive patient assessments to diagnose and manage acute and chronic health conditions, including prescribing medications and ordering diagnostic tests.
- Provide holistic patient-centered care, emphasizing disease prevention, health education, and counseling to individuals and families across the lifespan.
- Collaborate with other healthcare professionals to ensure continuity of care, make referrals when necessary, and advocate for the best possible health outcomes for patients within a variety of settings, from primary care to specialized clinics.

Occupational Therapists:

- Evaluate individuals' physical, mental, and cognitive conditions to develop personalized therapeutic interventions that enhance their ability to perform daily life activities.
- Design and implement individualized treatment plans aimed at improving clients' functional skills, adapting environments, and recommending assistive devices to promote independent living.
- Educate clients, caregivers, and families on strategies and modifications that support and facilitate participation in meaningful and purposeful activities across various settings (e.g., home, work, school, community).

Occupational Therapy Assistants:

- Responsible for collaborating with the OT, the client, and any family members in implementation of services

- Adapt or modify the home environment to mitigate identified hazards and facilitate greater participation in daily activities, exercise (particularly balance, strength, and gait training), and promotion of the safe performance of daily activities

Pharmacists:

- Dispense prescription medications to patients and offer expertise in the safe use of prescriptions, while providing detailed information on medications, including potential side effects and interactions.
- Conduct medication therapy management and provide counseling to ensure optimal therapeutic outcomes and improve patient adherence to medication regimens.
- Collaborate with healthcare providers to optimize medication therapy for patients, emphasizing the use of evidence-based medicine, and promote wellness and disease prevention through immunization services and health screenings.

Physical Therapists:

- Evaluate patients' physical conditions, diagnose functional mobility issues, and develop individualized treatment plans to restore or enhance physical abilities.
- Implement therapeutic interventions, such as manual techniques, exercises, and modalities, to improve mobility, decrease pain, and prevent or limit physical disabilities.
- Educate patients, families, and caregivers on exercises, techniques, and strategies to manage conditions and enhance long-term physical well-being.

Physical Therapy Assistants:

- Provide physical therapy services under the direction and supervision of a licensed physical therapist
- May include teaching patients/clients exercise for mobility, strength and coordination, training for activities such as walking with crutches, canes, or walkers

Physician Assistants:

- Conduct physical examinations, diagnose illnesses, and develop treatment plans under the supervision of physicians.
- Prescribe medications, order and interpret diagnostic tests, and provide preventive healthcare advice and patient education.
- Collaborate with physicians, nurses, and other healthcare professionals to ensure comprehensive and coordinated patient care.

Psychologists:

- Assess behavioral and mental function and well-being
- Can be involved in health care teams and typically work in hospitals, medical schools, outpatient clinics, nursing homes, pain clinics, rehabilitation facilities, and community health and mental health centers
- Support community and individual well-being, promote physical and mental health

Public Health Workers:

- Analyze and interpret data on health outcomes, environmental risks, and disease patterns to recommend public health strategies and interventions
- Design, implement, and evaluate public health campaigns, programs, and policies to address health disparities and improve community health outcomes
- Collaborate with various stakeholders, including governmental agencies, non-profits, and community members, to foster a multidisciplinary approach to public health challenges and solutions

Speech-Language Pathologists:

- Evaluate, diagnose, and treat speech, language, communication, and swallowing disorders
- Provide augmentative and alternative communication (AAC) systems for individuals with severe expressive and/or language comprehension disorders, such as progressive neurological disorders
- Treat individuals with feeding and swallowing difficulties, which may follow an illness, surgery, stroke, or injury

Social Workers:

- Assist individuals, families, and communities to enhance their individual and collective well-being by helping them develop the skills and abilities to cope with and address social and personal difficulties.
- Advocate for resources and social policies that improve social conditions, especially for vulnerable populations, and connect clients with essential community resources and services.
- Provide psycho-social assessments, interventions, and counseling to help clients navigate complex emotional, societal, and interpersonal challenges

Part 2: Review the Case Study (30 minutes)

Mr. X has been referred by his primary care provider for a comprehensive interprofessional assessment in order to provide the care partner with the necessary tools and strategies to allow him to safely “age in place” under the care of his spouse and family. Mr. X was diagnosed by his primary care provider (his family physician) 6 months ago and is in the early to moderate stages dementia.

For each of the specific concern(s) below, identify the profession(s) that are most relevant for providing appropriate support and advice. Consider not only the current concerns, but also how these may change given the progress of Mr. X’s dementia over time. Discuss how to best document and communicate care plans.

Care partners should provide their own insights into each of these issues and ask or provide additional information from their perspective, as needed. Use the table on pages 8-9 to take notes.

LIST OF CONCERNS

- New medications to support memory
- Coughing when eating
- Blood pressure control (his last BP was 140/92)
- Getting dressed
- Bathing independence
- Loose fitting dentures
- Moderate memory loss
- Mood swings
- Lost 10 pounds since diagnosis
- Hearing loss with hearing aids but not wearing them
- Confusion and getting lost when driving to familiar places
- Unknown patient goals and no advance care planning
- Forgets follow-up appointments
- Care partner support needs
- Firearms present in the home (safely stored)
- Potential phone or other scams

Community member: You are welcome to play the role of the care partner in the discussion. Please ask questions to the team throughout the discussion and provide your own insights as appropriate.

Concern Who addresses Notes

New Medications		
Coughing w/eating		
BP control		
Getting dressed		
Bathing independence		
Loose fitting dentures		
Moderate memory loss		
Mood swings		
Lost 10 pounds since diagnosis		
Hearing loss and use of hearing aids		
Confusion and getting lost		
Advance care planning		
Follow-up appointments		
Firearms in the home		

Potential scams (phone/online)		
Care partner support		

Rank order the top 5 most pressing issues and write a brief statement of what the caregiver can do to better engage members of the healthcare team to provide the best possible care for Mr. X:

1.

2.

3.

4.

5.

Part 3: Interprofessional Care Team Discussion and Debriefing (10 minutes)

Review key definitions:

- **Interprofessional education (IPE)** “occurs when two or more professions learn about, from, and with each other to enable effective collaboration and improve health outcomes.”
- **Interprofessional (or collaborative) care/practice** “occurs when multiple health workers from different professional backgrounds provide comprehensive health services by working with patients, their families, carers (care partner), and communities to deliver the highest quality of care across settings.”

(Source: Framework for Action on Interprofessional Education and Collaborative Practice, World Health Organization (WHO), 2010.)

***Refer to the Table on the next page to support the discussion**

Discuss the following as a group:

1. What are characteristics of ‘good’ collaborative teamwork?
2. Why are these ‘good’ characteristics important?
3. Select an additional characteristic from the table (next page) to discuss its potential impact.
4. How did your team function during the case study? Did you demonstrate any ‘good’ characteristics? Any detrimental characteristics?

Community member: What was your perception of how the team functioned?

Table 1. Characteristics of a Successful Interdisciplinary Team (*Not an all-inclusive list)

Characteristics	Description
Appropriate skill mix	<ul style="list-style-type: none"> • Mix and breadth of staff, personalities, individual attributes, professions, and experience
Common Purpose	<ul style="list-style-type: none"> • Team members generate a common and clearly defined purpose • Collective interests • Shared ownership • Ex. Improving patient care
Effective Communication	<ul style="list-style-type: none"> • Good communication skills are at the core of patient safety and effective teamwork • Share ideas and information quickly and regularly • Listening • Keeping written records • Allowing time for team reflection • Ability to discuss and resolve problems • “Two-way” communication <ul style="list-style-type: none"> ○ Especially important for high stakes environments (emergency department)
Effective Leadership	<ul style="list-style-type: none"> • Set and maintain structure • Managing conflict • Listen to members • Trust and support members • Calling for help appropriately • Constantly monitoring the situation • Setting priorities • Making decisions • Delegating tasks • Empowering team members
Flexibility	<ul style="list-style-type: none"> • Individuals need to be flexible to respond to the constantly changing service environment • Patient needs are constantly changing • Ability to cover each other’s roles, but knowing your boundaries
Good Cohesion	<ul style="list-style-type: none"> • Unique and identifiable team spirit and commitment • Cohesive teams improve team longevity
Measurable Goals	<ul style="list-style-type: none"> • Goals must be measurable and focused on the team’s task

Mutual Respect	<ul style="list-style-type: none"> • Respect the talents and beliefs of each member • Respect the professional contributions of each member • Accept and encourage diverse opinions
Personal Attributes	<ul style="list-style-type: none"> • Approachability • Appropriate delegation • Being able to compromise • Confidentiality • Decisiveness • Empathy • Organization skills • Knowing one's strengths and weaknesses
Quality and outcomes of care	<ul style="list-style-type: none"> • Ability to measure outcomes <ul style="list-style-type: none"> ○ Within team & external • Patient outcomes • Ability to reflect • Ability to accept criticism and act on it
Respecting/ Understanding Roles	<ul style="list-style-type: none"> • Understanding of how the roles of different professions can impact a patient • Understanding limitations and boundaries of each role • Understanding how your role fits within the team • Understanding how your role differs from other members
Team Culture	<ul style="list-style-type: none"> • Trust • Mutual respect • Reliability • Commitment • Support • Informal relationships • Camaraderie

Adapted from:

- Nancarrow SA, Booth A, Ariss S, Smith T, Enderby P, Roots A. Ten principles of good interdisciplinary team work. *Hum Resour Health*. 2013 May 10;11:19. doi:10.1186/1478-4491-11-19. PubMed PMID: 23663329; PubMed Central PMCID: PMC3662612.
- World Health Organization. (2019). *WHO Multi-professional Patient Safety Curriculum Guide*. [online] Available at: https://www.who.int/patientsafety/education/mp_curriculum_guide/en/ [Accessed 20 Sep. 2019].

Debriefing Questions (Large group wrap up) (5 minutes)

- What did you learn about the professional roles of your teammates? Did anything surprise you?
- How can the characteristics of a successful interprofessional team contribute to patient care?
- Can you describe the value of incorporating the care partner in interprofessional care?
- Why is interprofessional practice integral to patient care?

NOTES:
