Providing clinical team leadership by leading clinical team case reviews

Hour Requirements 20

Clinical Team Case Review Description

A clinical case review is a planned consultation with providers, generally working for the same organization, to present clinical cases and receive feedback from their peers. How does clinical case presentation differ from Quality Assurance (QA) case review covered in another BHA III practicum requirement? While a QA case review is focused on meeting organizational compliance standards to insure quality care for the client, a peer clinical case review benefits both the client and the provider. Unlike one-on-one supervision, a team case review allows BHAs to receive feedback and gain perspective from a larger clinical team. A clinical team may be a group of BHAs meeting in clinical group supervision or may also include clinicians and other providers from the same organization. A peer-based clinical team does not have a treatment relationship with the client, so client identifying information including names of employers, schools and organizations are removed to maintain client confidentiality. A BHA may have a number of reasons for choosing a case to present to their peers including lack of client progress in treatment, exploration of possible counselor counter-transference, discharge planning or any other situation where a BHA would like feedback from peers. Cases may be presented as success stories to illustrate the effectiveness of an intervention and to help peers learn from another provider's experience.

Components of a Peer Clinical Team Case Review

- Use a client case presentation form from your agency or from the resources section at the end of this document to organize your thoughts and create a chronological picture of your client's journey
- The client is not present and client confidentiality is protected
- Identify a reason or goal for presenting your case
- Present only information that is most relevant to achieving the goal of your presentation as opposed to providing a comprehensive history. A case presentation may include some or all of the information listed:
    - Demographics (age, gender, sexual orientation, marital status, children, living situation, employment/education, race/ethnicity)
    - Presenting Problem & Brief History (why the client is in treatment/services, how the problem developed over time, whether treatment/services were received previously, what was the outcome of treatment/services)
    - Client/Family Strengths
    - Client/Family Challenges
    - Cultural Diversity Issues
    - Diagnosis/Current Symptoms
    - Current Medications and Health Concerns
    - Risk Factors (suicide, violence, substance use, domestic violence, etc)
    - Goals and Interventions Used
    - What's Working and What's Not Working
    - Ethical Issues
    - Counter-transference (how do you feel about this client and how does it affect your work?)
- Reserve a portion of your allotted time for feedback and questions from peers to obtain help for challenging cases

Examples of Client Case Review Activities

- Preparing a case for presentation at a clinical team meeting, including completion of a case presentation form.
- Presenting a case and receiving feedback

- Facilitating clinical case presentation during a treatment team meeting to include: assigning BHAs to complete case presentations, ensuring participants stay on track, managing time, summarizing recommendations and decisions
- Contributing to the creation of clinical case presentation template or document

A Multidisciplinary Team (MDT) is a term that means multiple people in different disciplines working together on the same case. MDT's are used in healthcare organizations with an integrated model of patient care. Integrated care approaches client care from a holistic perspective understanding that medical issues may affect a patients behavioral health or that behavioral health conditions may be the cause of medical symptoms. A multidisciplinary team in this context may also be called an "integrated care treatment team". The purpose of the MDT meeting is to coordinate services and communicate as a team to improve overall health outcomes for patients. For your practicum and on this document, MDT will be used in the simplest terms, and can be used interchangeably with the term "treatment team" or "integrated care team."

Components of a Multidisciplinary Team (MDT)

- Functions as an "Integrated Care Treatment Team" for THOs using an Integrated Care approach to patient care
- BHAs participate in a professional capacity representing the behavioral health needs of a client
- Team members from the THO represent various disciplines (medical, behavioral health, other specialty clinics)
- BHAs collect information from the team to create a holistic view of the clients strengths and needs
- Regular attendance at meetings is required to track treatment progress and barriers over time

Examples of MDT Activities

- Participating as an observer or team member on a Multidisciplinary Team (MDT)
- Documenting progress reported by team members
- Giving a report at an MDT on the behavioral health status of the client
- Reviewing an MDT client's treatment plans

Evidence-Based Practices and Resources

- An Example: Case Presentation Outline
  https://www.wcu.edu/WebFiles/PDFs/686687CasePres.pdf
- An Example: Case Presentation Outline and Sample Presentation
  https://www.csub.edu/~bhartsell/Case_Presentation_Outline.doc
- Brochure: Different Roles in an MDT Clinical Team Case Review
  https://optforwellbeing.org/sites/default/files/documents/CAPA/MDT%20Pamphlet%20-%20May%2012.pdf
- An Example: How to Give a Social Work Clinical Case Presentation
  https://socialworkcoaching.com/how-to-give-a-social-work-clinical-case-presentation/