

## A practical guide to case based discussion (CbD)

### **What is CbD?**

CbD is a structured interview conducted by a supervisor and a trainee in a focussed manner around the actual written case records a trainee presents. It is not a comfortable chat nor is it a formal examination. It is a process which has both a grading element and a feedback function.

### **Getting Started**

Generally the trainee will select some cases and should give you the necessary records prior to the case discussion. The trainee should be guided to choose cases in which uncertainty or where a conflict of decision making has arisen.

### **What are the competencies being assessed?**

In practical terms, it is helpful for the supervisor to be familiar with the competencies being assessed using this tool e.g. which foundation competencies does CbD contribute evidence or which specialty training competencies does CbD inform.

Knowing what you are assessing is helpful during the actual assessment.

### **Planning the CbD**

Having selected the case it is helpful to prepare some questions that enable the gathering of information for key competencies e.g. for the competency: ***data gathering and interpretation***, questions such as: “*What relevant information had you available? What other information could have been useful?*” are relevant.

A general question such as “*What are the implications of your decision?*” can be useful for exploring a number of competencies.

Appendix 1 gives some examples of probing questions. This is guidance only. The key is to follow up with supplementary questions exploring the trainee’s responses.

### **Setting the scene**

It is clearly important to conduct the CbD in a quiet room away from any possible interruptions. Workload should be organised to allow time to conduct the CbD without rushing or cutting it short. Other people on the premises ought to know that you’re not to be interrupted and you should both switch your mobile phones off! Although this is not an examination, it is an important part of the trainee’s assessment and should be treated as such.

### **Conducting the CbD**

Timing depends upon the complexity of the case, but sufficient time should be built in to the discussion. As a rule of thumb the time taken for feedback should be at least as long as the time taken for discussion.

The sequencing of the CbD should be as follows:

1. Exploratory discussion
2. Making judgements
3. Feedback
4. Recommendations for development.

Allowing approximately 20-30 minutes per case (including feedback) is ideal.

It is vital to avoid:

1. Teaching “on the hoof” during exploratory discussion
2. Making judgements before the discussion is completed
3. Not giving feedback

## **Appendix 1**

### **Structured Question Guidance**

*The following questions are offered for guidance only and do not comprise a comprehensive list. They cover the various elements of professional judgment and may need adapting to whichever competency you are exploring.*

#### **Defines the problem**

What are the issues raised in this case?  
What conflicts are you trying to resolve?  
Why did you find it difficult/challenging?

#### **Integrates information**

What relevant information had you available?  
Why was this relevant?  
How did the data/information/evidence you had available help you to make your decision?  
How did you use the data/information/evidence available to you in this case?  
What other information could have been useful?

#### **Prioritises options**

What were your options? Which did you choose?  
Why did you choose this one?  
What are the advantages/disadvantages of your decision?  
How do you balance them?

#### **Considers implications**

What are the implications of your decision?  
For whom? (E.g. patient/relatives/doctor/practice/society)  
How might they feel about your choice?  
How does this influence your decision?

**Justifies decision**

How do you justify your decision?

What evidence/information have you to support your choice?

Can you give me an example?

Are you aware of any model or framework that helps you to justify your decision?

How does it help you? Can you apply it to this case?

Some people might argue.....how would you convince them of your point of view?

Why did you do this?

**Practises ethically**

What ethical framework did you refer to in this case?

How did you apply it?

How did it help you decide what to do?

How did you establish the patient's point of view?

What are their rights?

How did this influence your handling of the case?

**Works in a team**

Which colleagues did you involve in this case? Why?

How did you ensure you had effective communication with them?

Who could you have involved? What might they have been able to offer?

What is your role in this sort of situation?

**Upholds duties of a doctor**

What are your responsibilities/duties? How do they apply to this case?

How did you make sure you observed them?

Why are they important?

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