

# PATIENT PANEL IN CLERKSHIP

## Student Primer

The purpose of this document, along with the [Patient Panel e-Module](#), is to familiarize you with the patient panel, help you understand your roles and responsibilities, and provide you with direction on how to enhance your learning experience with your patient panel.

### THE FORMAL OBJECTIVES FOR THE PATIENT PANEL CURRICULUM:

- 1) Help the student learn how to navigate complex health systems and appreciate the experience through **the patient's lens** by following patients longitudinally through the health care system. *CanMEDS roles: leader, health advocate and collaborator*
- 2) Foster the student's professional identity formation and encourage development of a **humanistic, holistic professional** through longitudinal relationships with patients. *CanMEDS role: professional*
- 3) Raise the student's awareness for how **social determinants of health** shape the patient experience and facilitate an opportunity for them to **positively impact a patient's journey** through completion of an advocacy project. *CanMEDS roles: health advocate*

### WHAT IS THE PATIENT PANEL?

The patient panel is a new mandatory component of the 3<sup>rd</sup> year clerkship curriculum. It comprises of a **panel of two patients**, who you are asked to recruit between September-December during your clinical encounters in clerkship, and to follow longitudinally to allow for you to develop a relationship over the course of the year.

The goal is to have you **be included in the care** of these two patients (when possible) and take on roles that will support your development of **skills in reflection, empathy, communication, and advocacy** while you follow the patients. The Most Responsible Physician (MRP) remains responsible for the medical care of the patients. The MRP will continue to order investigations, provide prescriptions, review results of tests and explain diagnosis.

You will be oriented to the patient panel and your roles and responsibilities in the Transition to Clerkship (TTC) Course. Once you begin to have patient exposure in your clinical rotations starting in September, **you may initiate patient panel recruitment**.

## CRITERIA FOR PATIENT RECRUITMENT:

- 1) The patient must be followed by a physician who agrees to be the Most Responsible Physician (MRP) and supervisor for your patient panel. The MRP should be one of your clinical supervisors during clerkship. You should **ensure that the MRP is willing** to participate as your supervisor for that patient in this experience ***before recruiting a patient*** to your panel.
- 2) After reviewing the [Information Document for Patients and Families](#) (this version is for FITZ students), the **patient or their caregiver must provide verbal consent** to participate. *Links to versions for each Academy are provided at the end of this document; please ensure you select the appropriate version.* You need to have confirmed recruitment by January 7, 2022. If you are having challenges, you are to contact Dr. Clare Hutchinson or Dr. Michelle Hart.
- 3) The patient must be followed for at least one health condition over the year.
- 4) At least one of the patients should have a **social issue** (in addition to the health condition they are followed for) that the student would follow and for which they could advocate. Some examples of social issues include loneliness, social isolation, food insecurity, low health literacy, immigration challenges, low income, and language barriers.
- 5) At least **one of the two** patients on the panel must be an **older adult**.
- 6) The selection criteria for the older adult patient are as follows:
  - Age 65 or older,
  - Must have at least two co-morbidities that they are followed for, and
  - Must have a [Rockwood Clinical Frailty Score](#) of **at least 3-4**.

Once the patient has been recruited, along with agreement from the MRP to participate, followed by consent from the patient, you will begin to follow your patient over the course of your 3<sup>rd</sup> year of clerkship.

## WHY ARE WE IMPLEMENTING A PATIENT PANEL?

Following a patient through their health care experience over time can provide you with a greater **appreciation for the complex journey patients face** as they navigate the health care system. It can also facilitate physician identity formation, and potentially protect against the erosion of empathy that may occur over clerkship.

We are also implementing the patient panel to provide greater exposure to geriatrics in clerkship. Having repeated encounters over time with an older adult patient, in a supportive and advocating role, will help you gain an understanding of the **multifaceted determinants** of health in older adults, the **challenges for older adults** with complex comorbidities, and the complexities of older adults who are **frail and/or living in a vulnerable state** in the health care system. The nature of a longitudinal relationship also aims to promote a positive attitude and holistic approach toward caring for older adults.

## HOW DOES A PATIENT PANEL WORK?

1. Once you have been oriented to the Patient Panel (orientation in TTC, access to the **Patient Panel PRIMER for Students** and the [Patient Panel e-module](#)), you can begin to select your 2 patients for the panel as you gain patient exposure over the course of September-December during clerkship. Your patient recruitment **must be completed by January 7, 2022**.

*If you are experiencing **challenges with recruitment**, you must inform Dr. Clare Hutchinson or Dr. Michelle Hart. For **issues with recruitment of an older adult patient**, you must contact Dr. Michelle Hart.*

2. Once you select a patient for the panel, the MRP involved in that patient's care receives FROM YOU the [Patient Panel PRIMER for MRPs](#) and the link to access the [Patient Panel eModule](#). If the MRP agrees to be the supervising physician for that patient panelist, then you then give the patient the (Academy-specific) [Information Document for Patients and Families](#) (the MAM version is shown here). The patient would then need to **consent to participate** on your panel. The **MRP must also confirm verbally** with the patient that they consent to participate in your patient panel, and document this in the patient's chart.
3. You email yourself through their **hospital email** the patient's name, MRN, and contact information. To maintain confidentiality, you **will not record any confidential patient identifiers or information in any other place, nor use any email other than the hospital's**, which is secure.
4. You will follow their patients over the course of their 3<sup>rd</sup> year of clerkship.
5. You will be expected to **act as an advocate** for your patient, and **NOT AS A MEDICAL EXPERT**. You will **maintain contact** with the patient and their MRP over the course of the year by phone or other virtual communication modes.
6. After the initial meeting, you should have **at least three further interactions** (visits) with each patient over the course of the year. If possible, you are **encouraged to attend any virtual doctor's appointments** with their patient and MRP together. Alternatively, you may schedule telephone encounters separately, and **follow up with the MRP to discuss/debrief**. Each visit should be approximately 15-30 minutes in duration. In order not to interfere with their clinical duties, we ask that you **limit** your scheduled patient panel communication to a maximum of **one hour every two weeks**. Please avoid booking visits during clerkship rotations that are only one or two weeks long (anesthesia, OHNS, ophthalmology). Visits should not be booked during mandatory clerkship activities, such as seminars and transition education days.
7. You will **track** the encounters on MedSIS (more on this below).
8. By the end of the 3<sup>rd</sup> year of their clerkship, you will complete an **advocacy project** based on your experience with the panel patient.

9. After the Advocacy Project presentation, your relationship with patients on your panel will end. Guidance on how to execute a **closing discussion** with your patient panelists is provided below. The MRP will continue usual care with the patient.

## HOW DO WE CLASSIFY A PATIENT PANEL VISIT?

A patient panel visit is any visit which is **scheduled in advance**, and includes:

- In person, phone call or virtual visit between you and the patient (approximately 15-30 min) You must block your phone number if calling from a personal device.
- In person, phone call or virtual visit between you, patient, and MRP as part of a scheduled medical appointment
- In person, phone call or virtual visit between you and MRP (approx. 15-30 min)

## HOW ARE PATIENT PANEL VISITS LOGGED?

You are asked to log each patient panel visit in MedSIS to ensure completion. This will help you - as well as the coordinators of the patient panel - keep track of each encounter. Information must be **recorded in a way that protects the patient's identity**.

- Patients should be listed as Patient A and Patient B (**no names**).
- Record the date of the encounter and use the **free text box** to document the type of encounter: specify if the visit is **patient-student, patient-student-MRP, or student-MRP**, and indicate medium in brackets (in person/phone call/virtual visit).

## STUDENT-PATIENT VISITS

During your phone call or virtual visit with the patient, you should:

- Check on how the patient is doing,
- Ask about **any changes** in the patient's health status,
- Ask about **any new encounters** in the health care system- ask the patient to share any challenges or positive experiences they have had with the health care system.

## KEY CONSIDERATIONS

- You are there to **empathize with and support the patient** as they share their experiences. You can **advocate for the patient** by assisting them in navigating challenges in the health care system, helping with patient education, connecting them to resources, and supporting them in their communication with other health care providers.
- It is **NOT your role** to collect new medical information, order tests or investigations, provide prescriptions, or inform of any new diagnosis. **THIS REMAINS THE RESPONSIBILITY OF THE MRP.**
- If there is a diagnosis that is already known and the patient is aware of this diagnosis, then you may offer to help with patient education by explaining the diagnosis or by clarifying patient instructions **but will not provide any medical advice**.

- Before the end of the visit, you are responsible for discussing the **plan/schedule for the next visit** to maintain continuity.

### STUDENT-MRP-PATIENT VISIT

When you, the MRP, and patient meet, you are to observe the MRP in the medical component and may participate in supportive discussions to advocate on behalf of their patient. This is an opportunity for the MRP to model for you supportive, effective, and holistic care of the patient. It may be helpful for you to schedule a debrief with the MRP following the visit.

### STUDENT-MRP VISIT

When you and the MRP meet, the MRP may share with you updates or changes in the medical status of the patient. Some topics that have been suggested to the faculty to discuss with you include:

- Addressing all realms of the patient experience: social, psychological, emotional, physical
- How to approach caring for the patient in a holistic manner
- Patient experiences with navigating the health care system and accessing resources
- Recruitment of other health care providers/interdisciplinary team members in the care of the patient
- Brainstorming ways to support or advocate on behalf of the patient to address emotional, psychological, and/or physical challenges being experienced, as well as logistical challenges that may be impacting their health care journey, such as those relating to caregiving/support, navigating the health care system, or accessing resources.

### CLOSING YOUR PATIENT PANEL

You should schedule a closing encounter with your patients by the end of their 3<sup>rd</sup> year of clerkship. Below is a suggestion for how to execute this phone call or virtual visit:

- *“**Thank you** for your time, participation in the patient panel, and for sharing your experiences and health information. I have learned so much from our time together (give examples).”*
- *“I would like to just remind you that I have now finished my 3<sup>rd</sup> year of training and therefore this is the end of our patient panel relationship. You will however continue with receiving care as usual with your doctor. If you have any issues/challenges/medical questions that arise, please speak to your doctor about these.”*

## STAYING CONNECTED

Appointments between you and your MRP and/or patient should be during weekdays, with flexibility for evening and/or weekend meetings, if necessary.

### Student with Patient

- It is your ongoing responsibility to **maintain contact with their patients** by scheduling phone/virtual visits with your patients over the course of your 3<sup>rd</sup> year of clerkship. It is strongly suggested that at the end of each visit, you plan/schedule the next visit with the patient in order to maintain continuity.
- The [Information Document for Patients and Families](#) outlines how a patient can contact you through your Hospital Academy to advise of appointment changes or significant updates, such as surgery dates or hospitalization. **You must not give your personal email, phone number, or other contact information to the patient.**

### Student with Clerkship Preceptors (while on clerkship rotations)

- For appointments during daytime on weekdays, it is your **responsibility to check with your clerkship preceptor** to see if you are able to step away from your current rotation. Not all preceptors may be aware of this new Patient Panel initiative.
- In order not to interfere with your clinical duties we ask that you limit the scheduled patient panel communication to a maximum of **one hour every two weeks**. Please avoid booking visits during clerkship rotations that are only one or two weeks long (anesthesia, OHNS, ophthalmology). Visits should not be booked during mandatory clerkship activities such as seminars and transition education days.

### Student with MRP

- If there are immediate changes in the patient's medical status which come to your attention, please direct the patient **to a hospital emergency department** or to their **MRP**.
- You and your MRP should stay connected via phone or virtual meetings. The MRP's administrative assistant/office staff may be the preferred point of contact for scheduling these meetings. Email exchange can be used for this purpose as well, using **only hospital email to maintain security**.

## QUESTIONS OR CONCERNS

Feel free to reach out to Patient Panel Coordinators at any time:

- **Dr. Michelle Hart:** [mhart@baycrest.org](mailto:mhart@baycrest.org)
- **Dr. Clare Hutchinson:** [clare.hutchinson@nygh.on.ca](mailto:clare.hutchinson@nygh.on.ca)

## RESOURCES

- Information Document for Patients and Families: [FITZ](#), [MAM](#), [PB](#), [WB](#) versions
- [Patient Panel in Clerkship: A Primer for Most Responsible Physicians \(MRPs\)](#)
- [Patient Panel e-Module](#)

## **ACKNOWLEDGEMENTS**

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