**Patient-Based Discussion Preparation Checklist**

**Prepare your case**

Identify the type of case, problem, or symptom you’d like to use

Find a case, write a case, or request a case from the case writer

Write the learning objectives for the patient-based discussion

**Prepare your facilitators**

Use the [facilitator guide template](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/Facilitator%20Key%20Template_Standard.docx) to frame the discussion by inputting the clinical information, adding discussion questions, and writing the keyed responses for facilitators

Develop the facilitator checklist using the [provided template](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/Facilitator%20Checklist%20Template.docx)

Generate a facilitator refresher ([synchronous](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/Synchronous%20Facilitator%20Refresher%20Template.pptx) or [asynchronous, interactive](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/Interactive%20Facilitator%20Refresher%20Template.pptx)) covering the clinical and foundational science concepts related to the case

**Prepare your assessments**

Write the pre-work “entrance ticket” quiz based on knowledge you want your learners to have prior to the patient-based discussion

Create formative self-assessments on Brightspace that contain automated feedback

Write case-related summative assessment questions for weekly quiz and block exam

**Prepare your learners**

Ensure learners have access to the [interactive learner roles module](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/Interactive%20Roles%20Module.pptx) in case they need to refresh their memories on the expectations of each role

Learners should have a completed [Social Contract](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/PBD%20Social%20Contract%20Assignment.docx) for small group discussions

Save a copy of the facilitator guide and then remove all keyed responses to generate a learner copy

Distribute case learning objectives, section I of the case, and section I discussion questions to learners ahead of time

Course coordinators can use the learner copy to help set up shared notes for learner groups

Provide learners with a key for the case afterwards

**Prepare your supplementary assignments/activities**

Develop any pre-work that would supplement the patient-based discussion (a video, short reading, brief assignment outside of regular didactics, or an [interactive pre-work module](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/Interactive%20Pre-work%20Template.pptx))

Plan the debrief, including any formative assessment questions (see the [TopHat Question Guide](https://mcw0-my.sharepoint.com/personal/cweaver_mcw_edu/Documents/Documents/Template%20Workgroup/PBD%20Toolkit/Linked%20Files/TopHat%20Question%20Formats.pdf))

Prepare any related extended inquiry assignments such as a reflection or concept map assignment

**Resources**

* Contact [OEI](mailto:educational_improvement@mcw.edu) for help setting up your patient-based discussion. For example, they can assist with embedding modules in Brightspace, setting up a Storyboard for distributing section I to learners, etc.
* Refer to the [PBD Toolkit](file:///C:\Users\lrzepka\PBD%20Toolkit_Interactive.pptx) which contains guidelines for writing learning objectives, designing assessments, balancing pre-work and extended inquiry, as well as templates to make implementation easier.
* Cases can be found from a variety of resources including [Aquifer](https://aquifer.org/), [National Science Teaching Association](https://www.nsta.org/case-studies) (previously Buffalo’s National Center for Case Study Teaching in Science), and [MedEd Portal](https://www.mededportal.org/). MCW is currently identifying case writers who can also assist.
* Email [Chelsea Weaver](mailto:cweaver@mcw.edu) who is happy to help with any component.