Case Writing

How do I begin to write a case?

This educational workshop is designed to provide hands-on experience about case writing. During this interactive session conceptual information about case writing and curricular development will be discussed as you begin to write a case.

FACULTY

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Case Writing

WRITING A CASE — THE BEGINNING

AGENDA

A — Introduction to Case Writing

B — How Do I Select a Case?

C — Writing a Case

D — Discussion

• The basic elements of a case
• The range of case formats
• What makes a good case

References


Hafler JP. Case Writing: Case Writer’s Perspectives, in Boud D and Feletti G (eds.) The Challenge of Problem Based Learning, London: Kogan Page, 1981


Schmidt HG. Problem-based Learning: Rationale and Description. Medical Education, 1983;17:11-16.

INTRODUCTION TO CASE WRITING

Good case writing involves the following key elements:

*Think* over these questions and make some notes — What do you intend for this case? Who are the students? How much time do you have?

*Reflect* for a few minutes about the myriad personal or clinical situations in which you have participated.

*Discuss* with your colleagues some of those that you feel offer opportunities to address educational goals. From that discussion, brainstorm a list of topics that might serve as themes for a case. In deciding where to begin, start with these questions: who is your audience? what is your teaching goal?

*Write* your own story, based on the above, about one of the topics or themes on your list and do not worry about grammar, spelling or sentence structure, etc. Do let the story flow as if you were telling a non-physician sister or brother.

*Review* the case you have begun with your colleagues. Let them know the specific audience you have targeted for the case and then just read the case. **Have them** answer the following questions: Does the case serve one purpose? What should be added or deleted to help focus the case on the main goal?

**In a small group setting, a task for you and your colleagues:**

1. Decide how to divide the time and identify a group facilitator.
2. Do not reveal the goal(s) of your case, but ask them what they believe to be the goal(s) the case addresses.
3. You as the case author will serve as tutor; your colleagues are consultants.
4. Stay in the tutor/consultant mode for the agreed length of time.
5. Your colleagues should give feedback (suggestions, comments) to the case writer.
6. The group’s facilitator will then offer comments and suggestions.
7. The next step is to put the material on an e learning module.
Refining the Case:

Questions and considerations that may be effective in refining the draft include:

1. **Is the case developed from a real situation?**
   If you are not sure ask yourself: does the case seem contrived or does it follow a ‘classic’ textbook description. Real cases generally are neither contrived, nor ‘classic’ textbook.

2. **Who is the specific audience for this case?**

3. **Does the case contain accurate data?**
   If you are not sure check with either experts or the literature

4. **In deciding on revealing the culture / religion / race of the central person in the case ask yourself: Is the information is relevant to the goal of the case?**

5. **Does the case contain a puzzle?**
   If the format is unfolding, is there a dilemma at the end of the page? Where does the dilemma take you as a reader?

6. **Is the case grammatically well written?**

7. **Use names for all the people and institutions in the case, but be sure all real names have been changed adequately to maintain confidentiality.**

Rewrite and Trial Run:

- Think about editing, grammar, sentence structure and format.
- Develop a list of resources and decide what visual materials (if any) should be included.
- Write a list of guiding questions that will help focus students on the main points of the case.
- When you first use the case, set aside time to receive feedback from the students — most often your best critics.
Writing a Case

CASE TYPES

Cases can be written in a variety of formats from a short paragraph to a complete write-up. Cases are usually brief stories with one particular focus. One format commonly used is based on cases that unfold over two or three tutorials or class sessions.

DEFINITION OF A CASE STUDY

A case study is a descriptive document based on real-life situations, problems or incidents.

PRESENTATION

Problems can be presented in one of the following five formats:

1. paper problems:
   a. descriptive case:
      i. unfolds over two or three tutorials
      ii. is a short story used in one session.
   b. vignette or mini case: a brief paragraph with one main focus, generally used to exemplify one point or, with other mini cases, to compare and analyze focused issues
   c. bullet: one or two sentences with a single focus.

2. real patients — generally presented in the clinical settings

3. simulated or standardized patients — healthy individuals who assume a sick role for the purpose of education and evaluation, e.g., medical students’ history taking and physical examination skills

4. video tape/DVD

5. electronic cases create a story with varying levels of interaction
CASE COMPONENTS

Generally all cases have:

- a reference list (texts, journals, or any other appropriate source)
- a list of available resources (e.g., faculty members considered to be expert in their field; x-rays or lab results from the patient, etc.)
- guiding questions or objectives (to identify the main points of the case)
- paper cases include a tutor guide (not given to the students but included with each case to provide the facilitator additional detail or teaching guidance about the case)

Case development

1. Identify goals
2. Determine what types of problems would be appropriate
3. Select a “real” case or problem
4. Determine the format for presentation
5. Decide the level of detail to be included
6. Write the story
7. Format the case for presentation and divide the story for teaching
8. Write guiding questions
9. Identify resources
10. Review the case with colleagues and revise
11. Use the case to receive feedback from students.

WHAT IS A GOOD CASE?

Questions to ask yourself as you write or edit a case —

1. Is the case developed from a real situation?
   Ask yourself: does the case seem contrived or does it follow a ‘classic’ textbook description? Real cases generally display neither characteristic.

2. Does the case serve one purpose?
   Identify what you think is the purpose of the case and assess the case in that light.

3. Does the case contain accurate data?
   Check the facts of the case with experts or the literature.

4. Does the case contain a puzzle?
   If the case is written in an “unfolding” format, is there a dilemma at the end of the page? And where does the dilemma take you as a reader?

5. Who is the specific audience for this case?
   Identify that audience and assess the case in that light.

6. Is the case grammatically well written?

Writing the case

The case writers said that one issue they struggled with was the challenge of selecting appropriate information for the students — of choosing from the range of complex data available in real cases. The general consensus was that cases should have one central topic or theme, similar to a mystery story, rather than multiple threads.

‘I’m trying now to decide what to pack into this case and what to leave out. So I left out a lot of past medical history because it was all distracting and not relevant to my objectives. I know we want to stick to the thyroid part of this case, because that was my objective. So, I definitely see how I am going to trim it down.’

Another writer discussed the pitfalls of these attempts ‘to trim it down:’

‘We say the head, eyes, ears, nose and throat were negative, the chest was normal. We inundate the reader’s sensorium with too much data that is irrelevant. I will grant you this: you take the risk that the information you left out may be relevant to someone else. It is an editorial assumption on my part, but anything irrelevant to the point I want to make, I leave out.’

Yet at times authors do include irrelevant data in a case — with a particular goal in mind. ‘Red herrings’ are commonly written in for advanced students, but seldom for first-year students. Students new to problem-based learning, case authors discovered, had first to work on prioritizing a list of topics to study within the main topic of the case. The students’ ability to differentiate and prioritize among topics seemed to be an important consideration for writers as they made decisions about what to include and exclude in cases. Leading students off on a tangent risks confusion.

On the other hand, most real cases do naturally include red herrings, and so a case writer’s decision to include or exclude them is always worth further investigation, depending on the goals of the course and how tutorials are taught. Red herrings aside, writers who had tutored said that often a wide range of topics emerges as a case is discussed in tutorial, many of which are only indirectly related to the main theme of the case. However narrowly focused an author seeks to make a case or to keep it to a single theme, discussion often branches out in unexpected directions.

Another relevant issue to authors was that of deciding where the data for a case come from. The key questions case writers asked themselves were: should I write a case with only real data? or from my memory of a real situation? or from a hypothetical set of facts? Many writers said they could effectively and easily write real cases without any altered data, just from a recollection of their experiences. One writer said: ‘I take ideas from my experiences and probably look at a few charts just to be sure the data is accurate.’

In fact, among the authors surveyed, all cases were from actual situations. When authors used medical charts, permission and confidentiality were felt to be critical. As one writer said, ‘One sacred responsibility of the physician is to preserve the confidentiality of the patient in case writing.’

If cases are read, critiqued and edited by others before the final draft, content selection is often influenced by those who participate in the readings. One author noted:
‘Now I’ve got a case, I think I’m tailoring; I think I’ve got the kind of case we [the Curriculum Design Group] want. This is a good time to get help. A psychiatrist was there. She wanted a long involved mental status evaluation of the patient. She said the case was missing a detailed mental status exam. I thought that would be distracting because it really would get too far off track. There’s so much going on in any given case.’

Generally, as they finished their work, case writers produced a brief tutor guide describing the key points in the case as they saw them. The authors who had tutored said the such a guide had been extremely helpful to them. Often the guide was an author’s final involvement with a case, unless revisions were suggested after the case was used.

A general overview of the case writing process is indicated in Figure 1. It involves the following steps: development and planning, writing the case, case review, case use and, finally, evaluation of the cases after their use by the students. The writers were generally involved in case selection, content selection and writing the case and not all the steps outlined in Figure 1.

After finishing a case the authors said they would reflect on whether they had produced a ‘good’ case — and all had similar definitions for the characteristics of ‘good’ cases. The best ones, they all said, were those they had written from personal and professional experiences because they were familiar with the patient and they could select content based on their expertise. As one writer said, a good case ‘rests on someone’s assessment that they condense the material for presentation. In the story there are bits and pieces that require me to make a decision.’

Real cases seemed to stimulate more interest than hypothetical cases. One author said ‘I think when people know it is a real case their interest is greater than if it were a hypothetical case.’ Another two writers said, ‘good cases give them a sense it is real,’ and ‘I try and make my cases as true as possible, believing firmly that cases work best when they are not concocted.’

Most of the writers said that they preferred real situations over hypothetical ones because they were ‘more powerful teaching cases.’ The following statement represented most of the writers: ‘If you start trying to clean up cases and get rid of inconsistencies and errors in management you strip them of their teaching power.’

Good cases also needed to be well organized, interesting and accurate. For example, one writer said, ‘A good case grabs their interest’, and ‘I think a good case, in general, has some emotional content, some little shtick to it.’

Writers also mentioned the element of surprise, referring to a mystery, a puzzle, or a problem-solving case. Surprise, they all said, was necessary in a good case. Cases, they said, needed ‘some drama’ or should ‘present a puzzle,’ so that ‘it’s not clear from the start what’s going on,’ Many said they found that students liked the challenge of being detectives: ‘Cases have to pose an interesting puzzle which the student knows something about, but is still an enigma.’ One way the writers created such cases was to exclude a piece of data. For example, in a first-year cell biology case, the diagnosis was given right away on page one, while a critical component of the biochemical pathway was withheld. The writer said this helped the students to understand the basic science issues in the case rather than to attempt a differential diagnosis. Whether the writers aimed to create interesting or relevant cases or ones with a mystery in it, they all said that good cases had clear purposes.