

# Leaving Lucy

**Planning Notes:**

- 1) **Teams:** 4-5 students
- 2) **Length:** 2-3 class periods (45-75 minutes each)
- 3) **Resources:** Student workbook; Computers/Internet for research and preparing presentation

**OVERVIEW:**

Lucy is an 83-year-old woman with Alzheimer's Disease and diabetes whose husband passed away five years ago. She is cared for in a nursing home and all of her relatives live out of state. Recently, information has emerged about abusive caregivers at her facility. It has been determined that Lucy was one target of that abuse; she experienced neglect, financial abuse, and incompetent care for her health needs. As a team of physicians and social workers caring for Lucy, you must work together to create a comprehensive plan to prevent future elder abuse and maintain her health.

Lesson 7.9, focusing on the Plan component of the SOAP note will be an important preparation for this case study. Encourage students to use their workbook and notes!

**GOAL:**

Determine an evidence-based and comprehensive plan for a patient with multiple, complex health issues.

**ROLE:**

Ask students to brainstorm how the roles of the physicians would differ from that of the social workers.

You are a team of geriatricians (physicians for the elderly) and social workers.

**OBJECTIVE:**

Have students each select roles as geriatricians or social workers and focus on specializing in those aspects of the care plan for research and presentation.

Obj. 7.10: Create an evidence-based and comprehensive treatment plan.

**DELIVERABLES:**

- 1) SOAP Note (Plan section)
- 2) Presentation of Plan to a patient advocacy board

**ASSESSMENT:**

Your SOAP note Plan section will be evaluated on a rubric. You will present your plan to a peer group, posing as a panel of patient advocates interested in Lucy's case. The presentation will be evaluated for thoroughness, quality, and clarity.



Photo by Chalmers Butterfield via Wikimedia Commons

**NHES STANDARDS:**

**6.12.2:** Develop a plan to attain a personal health goal that addresses strengths, needs, and risks. **8.12.4:** Adapt health messages and communication techniques to a specific target audience

**Case Introduction:**

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Lucy is an 83-year-old former school teacher. She was diagnosed with Type II diabetes at age 62 and started developing dementia at age 75. Two years ago, her geriatrician diagnosed her with Alzheimer's and she has slowly declined in mental functioning since then. Her husband passed away from a heart attack five years ago. At that time she was placed in a senior assisted living center, but two years ago upon her diagnosis with Alzheimer's, she was moved to a nursing home where she receives around-the-clock care.

Lucy's diabetes has caused her to have loss of sensation in her feet and she has had two falls. She now uses a walker. Lucy's Alzheimer's causes her to frequently mix up recent events, names, and details about her day-to-day life. She is aware of her declining mental function but experiences one or two episodes each day where she is confused, agitated, and upset for a few hours at a time. During these times she becomes defiant and aggressive toward any healthcare worker who is assisting her.

Recently, her nursing home was slated to be closed due to reports of elder abuse. The investigative team determined that Lucy was one of the victims. An employee had convinced Lucy to write three checks, each for \$2,000 claiming he needed the funds to pay for her stay at the nursing home. It was also determined through camera records that Lucy was left in her room without anyone checking in on her for up to 6 hours during the day on many occasions. Her condition and contract with the nursing home stipulates that she will be checked on at minimum every hour during the day. Lucy has lost 7 pounds in the past month and her blood sugar levels and blood pressure have been fluctuating more than normal.

This particular case does not feature interaction between the patient and physicians (students) as many of the cases in other modules do. Students should draw all information from what is given in the vignette. The focus of this case is more about defining a comprehensive care plan rather than gathering new information.

**Subjective, Objective, & Assessment:**

Record the information from Lucy's story in the appropriate sections of the SOAP note. For the Assessment, write a short summary of the patient's situation but skip the differential diagnosis. For her final diagnosis be sure to include both her existing medical conditions as well as the specific types of abuse she experienced.

<b>SOAP Note</b>	
<b>Subjective:</b>	
<b>Signs &amp; Symptoms</b>	
<b>Allergies</b>	
<b>Medications</b>	
<b>Past medical history</b>	
<b>Last oral intake</b>	
<b>Events leading to injury or illness</b>	
<b>Frequency</b>	
<b>Associated Symptoms</b>	
<b>Radiation</b>	
<b>Character</b>	
<b>Onset</b>	
<b>Location</b>	
<b>Duration</b>	
<b>Exacerbating Factors</b>	
<b>Relieving Factors</b>	

<b>Objective:</b>	
Measurements	
Vital Signs	
Exam Results	
Lab Results	

<b>Assessment:</b>	
<b>Summary</b>	
<b>Differential Diagnoses</b>	<ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> </ol>
<b>Final Diagnosis</b>	<p><i>Claim:</i></p> <p><i>Evidence:</i></p> <p><i>Reasoning:</i></p>

**Research Medical Issues:**

Find background information for each of Lucy's health concerns and take note of considerations for her comprehensive treatment plan.

Patient Health Concern	Owner/ Source	Information
Diabetes		
Alzheimer's		
Financial abuse		
Neglect		
Mobility (falls)		
Other issues		

**Develop Plan Considerations:**

Develop Lucy’s plan by addressing each of the health concerns listed below.

Consideration	Proposed Plan
Patient Strengths	Since many Alzheimer’s patients have a better recollection of the distant past than the recent past, it may be helpful to draw out stories and memories from the patient about past experience, including teaching.
Patient Needs	
Patient Risk Factors	
Mental Health	
Social Health	Since Lucy experienced neglect, her social health is important to consider. Many elderly experience loneliness and isolation, especially after losing a spouse.
Physical Health	Diet and exercise considerations should be included in Lucy’s plan. Since she is using a walker and has had falls, the exercise program will need to be designed to be safe, monitored, and light.
Short-term	
Long-term	
Medication	Students may include medications to control her diabetes and Alzheimer’s. Ensure students are clear that there is no CURE for either disease but both can be treated.
Tests	
Procedures	
Follow-up care	Regular monitoring of Lucy’s physical health will be important, especially because of her status as a diabetic and Alzheimer’s patient. Her mobility may also change quickly and should be watched closely.
Communication	Communication between the care team and Lucy is important, but her family should also be consulted, even if a phone call/conference is required.
Patient Education	Lucy may have trouble comprehending large amounts of information or recalling tasks that she has to take personal responsibility for in the plan.

**Final Plan:**

Write out the final plan for Lucy, ensuring you address her health comprehensively, clearly, and effectively to promote her health.

Plan:

**Care Plan Presentation:**

As Lucy's team of social workers and geriatric physicians, prepare a short (3-5 minute) presentation for a panel of patient advocates who are serving as Lucy's health advisory board. Be sure to communicate the comprehensive plan with clarity and professionalism.

PRESENTATION PLANNING		
Team Member	Portion of Presentation	Notes
<p>Options for Presentations:</p> <p>1) Have teams pair up with another team and each take turns presenting to one another. Each can ask questions of the other team and then they can compare and contrast their presentations.</p> <p>2) Have teams present out to the whole class. Have a few students volunteer to be the patient advocacy panel and ask questions after each presentation. Alternatively, the entire class can act as the panel if time permits for more questions.</p>		



**Rubric:**

Obj. 7.10: Create an evidence-based and comprehensive treatment plan.

Needs Improvement	Emerging Mastery	Partial Mastery	Mastery
<ul style="list-style-type: none"> <li>- Plan is NOT comprehensive (missing 4 or more of the following: MH, SH, PH, short/long-term, followup care, &amp; patient education)</li> <li>- Plan does not address health concerns effectively (missing 4 or more health concern)</li> <li>- Plan is NOT communicated (in written and oral form) in a clear or professional manner</li> </ul>	<ul style="list-style-type: none"> <li>- Plan is somewhat comprehensive (missing up to 3 of the following: MH, SH, PH, short/long-term, followup care, &amp; patient education)</li> <li>- Plan addresses some health concerns effectively (missing 2-3 health concern)</li> <li>- Plan is communicated (in written and oral form) in a somewhat unclear or unprofessional manner</li> </ul>	<ul style="list-style-type: none"> <li>- Plan is nearly comprehensive (missing up to 2 of the following: MH, SH, PH, short/long-term, followup care, &amp; patient education)</li> <li>- Plan addresses most health concerns effectively (missing only 1 health concern)</li> <li>- Plan is communicated (in written and oral form) in a fairly clear and professional manner</li> </ul>	<ul style="list-style-type: none"> <li>- Plan is comprehensive (addresses MH, SH, PH, short/long-term, followup care, &amp; patient education)</li> <li>- Plan addresses each health concern effectively</li> <li>- Plan is communicated (in written and oral form) in a clear and professional manner</li> </ul>

**Post-Case Wrap-up Questions:****Module 7 Learning Objectives:**

<b>Obj. 7.1:</b> Demonstrate strategies to prevent, manage, or resolve conflicts.
<b>Obj. 7.2:</b> Identify the roles of a social worker.
<b>Obj. 7.3:</b> Demonstrate how to influence and support others to reduce gun violence.
<b>Obj. 7.4:</b> Identify risk factors, consequences, and prevention methods for intimate partner violence.
<b>Obj. 7.5:</b> Explain the role of a safe, stable, nurturing parent-child relationship to children's health.
<b>Obj. 7.6:</b> Identify the types of elder abuse and the risk and protective factors for elder abuse.
<b>Obj. 7.7:</b> Recognize the risk factors and warning signs for suicide.
<b>Obj. 7.8:</b> Evaluate the impact of technology on personal, family, and community health.

ANSWER THE FOLLOWING QUESTIONS ON A SEPARATE SHEET OF PAPER.

**Obj 7.1:** Explain how elder abuse could be prevented using the 4-step public health approach to violence prevention.

**Obj 7.2:** Name three ways a social worker may help the elderly improve their health status.

**Obj 7.3:** Considering the data, which of the following violence involving guns should the security team of a senior center be most concerned about for those age 65 years and older: violent crime, rape/sexual assault, robbery, or simple/aggravated assault? Why?

**Obj 7.4:** Lucy did not experience intimate partner violence (IPV). However, list one COMMON risk factor for the perpetration of IPV and perpetration of elder abuse.

**Obj 7.5:** A parent should strive to create a safe, stable, and nurturing relationship. When these qualities are absent, child maltreatment may result. Explain how these three qualities are also important for caregivers for the elderly.

**Obj 7.6:** What type of elder abuse did Lucy face? Name two risk and two protective factors in her situation that may have influenced the likelihood of perpetration of the abuse.

**Obj 7.7:** Suicide among the elderly is not as common as it is among younger populations, however it still does occur. If the elderly home decided to create a suicide prevention program for residents, what risk factors or warning signs should it consider among the elderly.

**Obj 7.8:** Name 3 effects of electronic aggression. Consider the individual, family, school, and community level.