MARGARET
PELLI
# CASE DIGEST

## CASE NAME
MARGARET PELLI

## STUDENT GROUP
SOM students enrolled in OMS2 Geriatrics module

## DEPARTMENT
UMDNJ SOM Geriatrics

## DERIVATION

<table>
<thead>
<tr>
<th>Created</th>
<th>2011</th>
<th>Kevin Overbeck, DO, Pamela Basehore, EdD, MPH, Anita Chopra, MD, Kathy Alburger</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Editing: Sima C. Bennett, MPH, RD, Clinical Education &amp; Assessment Center</td>
</tr>
</tbody>
</table>

## CONTENT/CONCEPTS/FOCUS

### Purpose
- To provide students an opportunity and scenario in which they can demonstrate competence with the Mini Mental Status Exam and the Clock Drawing Test.

### Planned Outcomes
- Students will administer the MMSE and the CDT and document the results in SOAP format.

### Clinical Content
- Forgetfulness/memory loss in a senior adult

### Tasks/ Skills
- Conduct a cognitive screening using the Mini Mental Status Exam and the Clock Drawing Test.
- Document and interpret scores.

## SUPPORTIVE OR RELATED MATERIALS OR REFERENCES

- Lecture sessions as part of the OMS2 Geriatrics Module
- Documents
  - OMS2 Geriatrics Module Student Instructions
  - Margaret Pelli Chart/Doorway Instructions
  - Margaret Pelli Interstation Exercise form
  - Margaret Pelli Interstation Grading rubric
  - Margaret Pelli Performance Checklist
# STAGING

## SCENARIO

Patient presents to an ambulatory facility with a history of forgetfulness and memory loss for approximately one year, in response to which student will administer the MMSE and the Clock Drawing Test.

This encounter is one of a set of three designed to teach students use of various assessments and instruments useful to geriatric practice. The encounters are scheduled over the course of two days, with each student doing only one of the three encounters.

This encounter (and its companion encounters) require a partner pair of SPs – one to act the patient role, the other to watch the encounter in real time and complete the performance checklist.

### SP RECRUITING: MARGARET PELLI

<table>
<thead>
<tr>
<th>Profile</th>
<th>Ideal</th>
<th>Qualifiers</th>
<th>Disqualifiers</th>
</tr>
</thead>
<tbody>
<tr>
<td>74 y.o. female</td>
<td></td>
<td>Senior adult</td>
<td>Appearing out of age range, Presenting as frail</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Physical Contact/Demands</th>
<th>OMM/OMT</th>
<th>Physical Exam</th>
<th>Communication only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>--</td>
<td>--</td>
<td>X</td>
</tr>
</tbody>
</table>

**Tasks**

Present patient history and physical state as instructed. Respond to student instructions for MMSE and the CDT.

### SP RECRUITING: EVALUATOR

<table>
<thead>
<tr>
<th>Profile</th>
<th>Ideal</th>
<th>Qualifiers</th>
<th>Disqualifiers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Ability to use checklist to evaluate student performance. Any gender/age acceptable</td>
<td>(absence of qualifying characteristics)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Physical Contact/Demands</th>
<th>OMM/OMT</th>
<th>Physical Exam</th>
<th>Communication only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>--</td>
<td>--</td>
<td>(No communication with students; evaluator will be seated in Viewing Area.)</td>
</tr>
</tbody>
</table>

**Tasks**

Evaluate student performance using Performance Checklist.
### SPECIAL EQUIPMENT/PROPS/STAGING

<table>
<thead>
<tr>
<th>Setting/Room</th>
<th>University Health Services: Exam room of a an ambulatory facility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Equipment</strong></td>
<td>Standard diagnostic equipment</td>
</tr>
<tr>
<td></td>
<td>Standard furnishings</td>
</tr>
<tr>
<td><strong>Special Supplies or Props (non-paper)</strong></td>
<td>(none)</td>
</tr>
<tr>
<td><strong>SP Clothing / Makeup</strong></td>
<td>Casual street clothes</td>
</tr>
<tr>
<td><strong>Paperwork</strong></td>
<td>In advance &quot;OMS2 Geriatrics Module Student Instructions&quot;</td>
</tr>
<tr>
<td>Orientation Room</td>
<td>(none)</td>
</tr>
<tr>
<td>At door</td>
<td><strong>Margaret Pelli Chart/Doorway Instructions</strong> in plastic protector – 3 copies at each station so that students can keep charts while they write their note.</td>
</tr>
<tr>
<td></td>
<td>o Students may examine the chart as soon as they get into position. No need to wait until &quot;begin encounter&quot; announcement.</td>
</tr>
<tr>
<td></td>
<td>o Student labeled/personalized folders arranged in order of student's arrival containing the following, each prelabeled with student's name</td>
</tr>
<tr>
<td></td>
<td>o MMSE form</td>
</tr>
<tr>
<td></td>
<td>o Clock Drawing Test form</td>
</tr>
<tr>
<td>In Exam Room (as prop)</td>
<td>(none)</td>
</tr>
<tr>
<td>Post Encounter</td>
<td><strong>Margaret Pelli Interstation Exercise form</strong></td>
</tr>
<tr>
<td></td>
<td><strong>OMS2 Geriatrics Module Student Survey</strong></td>
</tr>
<tr>
<td>SP</td>
<td>Assists Evaluator with scoring as needed.</td>
</tr>
<tr>
<td>Evaluator</td>
<td>SP-Evaluator: <strong>Margaret Pelli Performance Checklist</strong> completed in real time.</td>
</tr>
<tr>
<td>Post Session</td>
<td>Completed paperwork bundled and transferred to NJISA with <strong>Margaret Pelli Interstation Grading Rubric</strong> prelabeled with students’ names.</td>
</tr>
<tr>
<td><strong>Misc.</strong></td>
<td>Double cast – two performers plus two evaluators.</td>
</tr>
</tbody>
</table>
### TIMELINE

<table>
<thead>
<tr>
<th>Time (min)</th>
<th>Session Orientation</th>
<th>Encounter</th>
<th>Interstation Activity</th>
<th>Next / Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>(before encounter)</td>
<td>15</td>
<td>10</td>
<td>Student leaves suite.</td>
<td></td>
</tr>
</tbody>
</table>

### RECORDING

Recorded for development and training. No plan for students to watch their recorded encounter.
1. **CASE OVERVIEW**
   - You are Margaret Pelli, a senior adult with a history of several stable chronic diseases, who presents for evaluation of “memory problems” of about a year’s duration.
   - You are one of at least two other SPs playing this role, and your role is one of three character presentations (each one also double cast) comprising a suite of exercises designed to teach second year medical students use of certain assessment instruments and techniques commonly employed in geriatric medicine. You’ll notice that the students are given very specific tasks to complete; their approach will not be comprehensive in scope – and this reflects their novice status and the very focused nature of the assignment.
   - For this entire set of encounters, SPs are used to evaluate student performance, but SPs playing the roles are separate from the ones evaluating them.

2. **ENCOUNTER SETTING**
   - University Health Services: exam room of an ambulatory (outpatient) medical practice.

3. **SP RELATIONSHIPS**
   - All participants in this encounter are strangers to one another.

4. **WHAT GOES ON IN THIS ENCOUNTER**
   - A chart is provided to the student before the encounter, which contains information about Margaret Pelli’s medical profile and memory problems. Students are directed to administer the Mini Mental Status Exam and the Clock Drawing Test to Mrs. Pelli, which evaluate various aspects of memory and perception.
   - Because of the focused nature of this encounter, neither broad history taking nor physical examination is required in this encounter. Students have been advised to think of their role similar to that of a technician who comes into the exam room to perform a particular function and then leaves. While appropriate communication and interpersonal skills are expected, the students are not required to provide feedback on their findings or otherwise advise or prescribe for the patient. The entire focus of this encounter is the asking of questions that comprise the Mini Mental Status Exam and directing Mrs. Pelli in the completion of the Clock Drawing Test.
## 5. MARGARET PELLI CHARACTER PRESENTATION

<table>
<thead>
<tr>
<th>Age Range</th>
<th>Your own age, preferably 74 y.o. or close to it.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presentation</td>
<td><strong>Body Language/ Symptom Presentation</strong></td>
</tr>
<tr>
<td>Affect</td>
<td>• Pleasant, cooperative</td>
</tr>
<tr>
<td></td>
<td>• A bit nervous about being in the doctor’s office.</td>
</tr>
<tr>
<td></td>
<td>• Knowledgeable about your medical conditions – high blood pressure and high cholesterol – for which she sees a doctor every 6 months for a check-up.</td>
</tr>
<tr>
<td></td>
<td>• Minimizes the forgetfulness issue, dismissing any memory slips as a normal part of aging.</td>
</tr>
<tr>
<td>Appearance/ Costuming</td>
<td>• Casual street clothes</td>
</tr>
</tbody>
</table>

### Starting Position

Sitting in the chair.

## 6. MARGARET PELLI’S STORY

The following information is provided to you so that you can construct an image in your mind of Margaret Pelli. It is unlikely that you will actually be asked any of this information, as students have been provided with all of the background information they need to complete their focused task. Still, knowing who Margaret Pelli is will help you project the essence of her character throughout the encounter.

- You are a retired office manager.
- You live in your son’s 2-story home in a quiet neighborhood with his family since your husband died 5 years ago.
- You enjoy shopping at the mall, reading, watching TV and Sunday dinners with the family.
- You smoked many years ago but quit after your first child was born. Now, your vices include wine with dinner and 2 cups of coffee in the morning with one after dinner. You walk for exercise about 30 min/day.
- You’ve had a pretty healthy life. Despite your few medical conditions (see below), you take your medicine, generally feel pretty decent, consider yourself a well person, visit the doctor regularly and follow medical advice given to you. Cataract surgery at age 60 is the only surgery you’ve ever had, and you have no allergies. Since your husband died, you have not engaged in sexual activity.
- Your family has had its share of the “normal diseases you get when you get old:”:
  - Mother died of a stroke at 70
  - Father had high blood pressure and diabetes; died at age 80.
  - Younger brother (65) has high blood pressure and diabetes.
  - Younger sister (64) in good health
• Medical Conditions
  o High blood pressure – take Furosemide (Lasix) in the morning. Today’s blood pressure was 144/84.
  o High cholesterol – take Atorvastatin (Lipitor) and a baby aspirin every morning. Your most recent LDL levels were great.
  o Cataract surgery at age 60

• Memory Issues
  o While your son has been pointing out your memory lapses for at least a year to you, you consider yourself no worse off than any other person your age and think that not only is your memory not too faulty but that whatever deficits you do have is just a normal part of aging.
  o Six months ago you did forget where you parked your call at the mall and since then you’ve stopped driving.

What brings you in today (chief complaint): Your son is the one who has made you come in. He’s concerned about your memory; you are not.

When the student enters the exam room, s/he knows that you have already begun your appointment with Dr. Reynolds and that Dr. Reynolds has asked for the special testing about to be conducted. The student will probably begin the encounter by introducing himself/herself and then explain what s/he will do with you, conduct the testing, and then exit the exam room assuring you that Dr. Reynolds will return soon to complete the visit.

Not all students will ask you (as they have already been given this information), but if a student asks the purpose of your visit, please provide:

My son insisted that I come in for a checkup, but I feel fine.

He tells me that I keep forgetting things like where I parked my car and getting lost in my neighborhood.

I think my son exaggerates. Ha, just wait till he gets to be my age!

Sure, I sometimes forget things, but this is just a sign of getting old, right?

7. MARGARET PELLI’S EXAMINATION (INTERVIEW & TESTING)

The Mini-Mental Status Examination (MMSE) offers a quick and simple way to quantify cognitive function and screen for cognitive loss. It tests a patient’s orientation to time and place, attention, calculation, immediate recall (“registration”) and delayed recall, language (naming items, repetition, comprehension, reading) and motor skills (writing and copying). Each section of the test involves a related series of questions or commands. The patient receives one point for each correct answer for a total score of 30 points. A score below 20 usually indicates cognitive impairment. Section sub-scores are also considered independent of the total score to guide assumptions on the patient’s particular cognitive deficit(s).

The MMSE is administered by an examiner – in this case, the medical student – from a copyrighted form that will be made available in the Exam Room. Questions and commands must be issued to the patient correctly in order for the patient’s sub-scores and overall score to be considered valid. It is very important that you accurately provide these responses, as students will need to modify their approach to you based on your responses. And, how they react to your responses plays heavily into how they are evaluated.

For your convenience, questions to which you are to respond incorrectly or with a particular response are bolded.

Students are graded on their ability to accurately administer both instruments and interpret and document the results. The behavior checklist is scored out of total possible points of 14 and is weighted 80% in the total case score. The note is compared to a “model note” and scored out of a total of 9 points and weighted 20% in the total case score.

<table>
<thead>
<tr>
<th>STUDENT PROMPTS</th>
<th>SP ANSWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>The student is expected to make some introductory remarks concerning</td>
<td>No particular response needed. You can nod to indicate you understand and</td>
</tr>
</tbody>
</table>
administering the MMSE to you.

Although the student already knows that the purpose of your visit is “forgetfulness,” s/he might ask you a few questions regarding your memory or ask your permission to proceed with a memory evaluation.

You can answer with these statements as provided above:

- My son insisted that I come in for a checkup, but I feel fine.
- He tells me that I keep forgetting things like where I parked my car and getting lost in my neighborhood.
- I think my son exaggerates. Ha, just wait ’till he gets to be my age!
- Sure, I sometimes forget things, but this is just a sign of getting old, right?

DO YOU HAVE ANY TROUBLE WITH YOUR MEMORY?

You can continue with the same theme:

- I don’t think so, but my son tells me that I keep forgetting things.
- I think my son exaggerates

DO YOU MIND IF I ASK YOU SOME QUESTIONS ABOUT YOUR MEMORY?

No. Go right ahead.

At some point during administration of the MMSE, the student may ask you your age (although it’s provided in the chart) and your level of education.

74 (or whatever age has been agreed upon for Margaret Pelli)

High school graduate

**Orientation Questions: Time**

WHAT IS THE YEAR?
- SEASON?
- MONTH OF THE YEAR?
- DAY OF THE WEEK?
- DATE?

- Answer non-highlighted questions correctly.
- If there is a transition of seasons, it is acceptable to answer fall/winter, winter/spring, etc.
- Answer the date question incorrectly – be off by 7 days behind today’s date.

**Orientation Questions: Place**

WHERE ARE WE NOW? WHAT IS THE …
- STATE?
- COUNTY?
- CITY/TOWN?
- BUILDING?
- FLOOR OF THE BUILDING?

- Answer non-highlighted questions correctly.
- NJ
- I don’t know that. (You don’t know the county.)
- Cherry Hill
- A doctor’s office building.
- Third floor.
### Immediate Recall

LISTEN CAREFULLY. I AM GOING TO SAY 3 WORDS. YOU SAY THEM BACK AFTER I STOP. READY? HERE THEY ARE:

- **APPLE**
- **PENNY**
- **TABLE**

NOW, REPEAT THOSE WORDS BACK TO ME.

Student should redo this testing segment by repeating the three words as was done the first time.

- **APPLE**
- **PENNY**
- **TABLE**

You should remember the first two words but hesitate on the third.

**Apple** [short pause]

**Penny** [long pause]

*I can’t remember the third word.*

Repeat correctly.

**Apple** [short pause]

**Penny** [short pause]

**Table**

Note that the student is expected to provide proper instruction – specifically that the words should be repeated after s/he has stated all three. It is incorrect for a student to ask you to repeat the words individually after s/he has uttered each one. Nevertheless, if a student errs in this manner, follow his/her lead and perform the challenge as you are instructed and not in the way you know the challenge should be done.

NOW KEEP THOSE WORDS IN MIND. I AM GOING TO ASK YOU TO SAY THEM AGAIN IN A FEW MINUTES.

(No particular response needed.)

### Attention and Calculation

NOW I’D LIKE YOU TO SUBTRACT 7 FROM 100. THEN KEEP SUBTRACTING 7 FROM EACH ANSWER UNTIL I TELL YOU TO STOP.

- **WHAT IS 100 TAKE AWAY 7?**
- **KEEP GOING…**
- **KEEP GOING...**
- **KEEP GOING…(etc.)**

This challenge is referred to as the “Serial Sevens.” You are to answer this incorrectly using these numbers:

- **93**
- **85**
- **78**
- **61**
- **64**

In the event that a patient refuses to do the Serial Sevens, examiners can provide the following alternate challenge. Since you are not refusing, a student would not be expected to ask you to do this. However, if s/he does, please respond:

- **SPELL WORLD FORWARD, THEN BACKWARD**

Spell it incorrectly, such as **D – L – O – R – W**
### Delayed Recall

**WHAT WERE THE 3 WORDS THAT I ASKED YOU TO REMEMBER?**

- You do not remember the words at all.
  
  *Seven???
  
  *I don’t remember the others.*

### Language: Naming

The student is expected to point to two objects, typically a pen or pencil and a wrist-watch. However, with so many students no longer wearing wrist-watches the second item may be any common item in the room (chair, floor, etc.)

**WHAT IS THIS?**

**WHAT IS THIS?**

- Answer correctly.

### Language: Repetition

**NOW I AM GOING TO ASK YOU TO REPEAT WHAT I SAY. READY?**

*NO IFS, ANDS, OR BUTS.*

**NOW YOU SAY THAT.**

- Repeat the phrase correctly, making sure to provide the plural forms: ifs, ends, buts

### Language: Comprehension

**LISTEN CAREFULLY BECAUSE I AM GOING TO ASK YOU TO DO SOMETHING.**

**TAKE THIS PAPER IN YOUR RIGHT HAND**

**FOLD IT IN HALF**

**AND PUT IT ON THE FLOOR (or TABLE).**

- You perform this with an error:
  
  *Pick up the paper with your right hand.
  
  *Fold in half again* – this is incorrect, as it should only be folded in half once.
  
  *Place it on the floor (or table) as directed.*

### Language: Reading

The MMSE form contains a pre-printed sheet that contains a phrase, which the student is expected to show you while stating:

**PLEASE READ THIS AND DO WHAT IT SAYS.**

The phrase reads: “Close your eyes.”

- Perform this correctly by reading the phrase aloud and closing your eyes.

### Motor Skills: Writing

Providing you with a piece of blank paper, the student is expected to state:

**PLEASE WRITE A SENTENCE.**

- Respond by questioning:
  
  *Any sentence?*

- The student will either answer that you may write any sentence you wish, or may tell you to write about the weather, or may give you a particular
• Write whatever the student tells you to write. Or, given free choice, write:
  The weather is nice (or bad). [whichever applies]

Motor Skills: Drawing

Providing you with a paper with intersecting pentagons, the student is expected to instruct you:

PLEASE COPY THIS DESIGN.

• You respond incorrectly by drawing a figure that looks like the one shown here. Please make sure to draw precisely what is shown here.
• Notice that the right hand figure is a more of a diamond than a pentagon.
• The figures do not overlap; instead, they meet at a point.

Based on this performance, your MMSE score should be 18/30 – enough to show deficit.

The Clock Drawing Test

The Clock Drawing Test involves asking the patient to draw the face of a clock, but there are numerous variations, including starting with a pre-drawn circle rather than a blank page and having the patient draw arms to denote a certain time. There are also a number of ways to score the test. However, the common factor in all of these variations is that this quick test is a useful screen for cognitive dysfunction related to dementia, delirium, or a range of neurological and psychiatric illnesses.

The premise behind the Clock Drawing Test is that there are a host of cognitive, motor and perceptual functions required simultaneously for successful completion -- orientation, conceptualization of time, visual spatial organization, memory, executive function, auditory comprehension, visual memory, motor programming, numerical knowledge, semantic instruction, inhibition of distracting stimuli, concentration and frustration tolerance – and that similar demands are shared by independent living skills.

The completely normal clock is therefore a suggestion that a number of functions are intact. Alternately, a grossly abnormal clock is an important indicator of potential problems.
DRAW A CLOCK WITH THE HANDS SHOWING 10 MINUTES AFTER 11:00.

Correct administration of this test requires that the student not give you any additional information or direction than the statement which is show at left. However, you are to challenge the student by asking for clarification and further direction, as follows:

What kind of clock should I draw?

You can also add:

How big should I draw it?

The student should answer:

I CAN'T GIVE YOU ANY ADDITIONAL INFORMATION (and then repeat….)

The student should answer:

I CAN'T GIVE YOU ANY ADDITIONAL INFORMATION (and then repeat….)

DRAW A CLOCK WITH THE HANDS SHOWING 10 MINUTES AFTER 11:00.

This is the clock you should draw.

Notice the errors:

- In the lower right hand quadrant, an extra number is crowded in. Note that a 7 is in the position which should be occupied by a 6.
- There are two number 12s. One is in the position which should be held by 11.
- The 9 is pushed further down than it should be.
- The hands are all wrong. As hands they are not drawn correctly. They do not indicate the correct time.

8. FOLLOWING THE ENCOUNTER

The encounter will probably end with the student’s thanking you for your time and, possibly, your doctor’s prompt return to conclude your visit. At this point, the SP portraying Margaret Pelli should assist the Margaret Pelli Evaluator with completing any outstanding items on the Performance Checklist.

9. CONDUCT EXPECTATIONS FOR STANDARDIZED PATIENTS

- In order to preserve the authenticity of all encounters, please refrain from all conversations and interactions with examinees while in the suite and anywhere on campus while out of character, unless specifically dictated by our programming.
  - While you are in the CEAC, please maintain as much physical distance between yourself and examinees as possible while you are out of character. This may include avoidance of common areas and spaces where examinees gather.
At the conclusion of your assignment, please refrain from assembling in the reception area. Kindly wait in the Break Room.

While examinees are moving about between exam and feedback rooms, kindly enter and exit your assigned exam room exclusively through the exterior hallways (C & D), as examinees will be circulating in the Viewing Gallery.

Use of cell phones by SPs to carry on telephone conversations while in the exam rooms – whether on duty or on break – is expressly forbidden. Telephones must be off or silenced; vibrate mode is not acceptable. Telephones may be used in the exam rooms for text messaging by SPs on break but not between students while on duty. Violation of these rules may result in dismissal from our program and are not negotiable. Any SP expecting an important telephone call while on duty is welcome to leave his/her telephone with CEAC staff and, depending on the nature of the incoming call, will be notified at the first available opportunity at the discretion of CEAC Management.

10. STANDARDIZED PATIENT SAFETY

Fire exit signs are posted at the ends of Hallways C and D. Please familiarize yourself with them before the encounter. In the event that the fire alarm sounds, immediately break character and exit the suite through the nearest fire exit.

In the event that you experience a true medical emergency while you are in character and are able to express your needs, please inform the examinee or a staff member that you are out of character and in distress. It is important that you clearly announce to the examinee that you are out of character, as examinees may initially assume that your distress call is part of the simulation. Emergency services will be obtained for you ASAP.

In the event that an examinee causes you discomfort, distress or pain, you may come out of character at your discretion or choose to wait until the end of the encounter. Please notify CEAC staff as soon as possible so that your needs can be addressed.