



# **Template for use in Traditional Chinese Medicine (TCM) case-study Research Projects**


Aleksandar Zivalijevic

Vahideh Toossi

New Zealand College of Chinese Medicine





# KEYWORDS

- ▶ TCM (Traditional Chinese Medicine)
  - ▶ Case-study
  - ▶ Case-study Template
- 




# Definition Of Case-studies

- Case-studies are a research strategy utilized in research projects whose focus is on :understanding the dynamics present in the single settings” (Eisenhardt, 1989, p. 564)
  - However, the single settings” constraint does not stop authors from covering multiple cases, nor from utilizing multiple levels of analysis in one study.
- 



# History of Case-reports in TCM

- ▶ Depicting case-reports in TCM is not uncommon, or unknown of.
  - ▶ One very early example is seen in Huang Di Nei Jing, that produced many written documents outlining medical practice in observed case-studies (Ferrigno, Ryan, Deare, 2006).
- 



# The purpose of this study

Existing TCM case-study reports have somewhat varied forms.

We put forward a standard template suitable for reporting results of TCM case-studies, appreciated by all medical and healthcare providers.



# The purpose of this study

It is not uncommon that TCM research has been criticized for methodological and interpretative limitations (O'Connell, Wand, & Goldacre, 2009).

Criticism can be attributed to varied presentations of the TCM case-study reports.


We provide a structured guideline on how a case-study report should be written, and indicate key aspects that are crucial to the validity of the report.

# Guidelines for a Standard TCM Case-study Report

We suggest that the report should (at least) include the following sections:

- Introduction and Background
- Case and Treatment
- Discussion
- Conclusion

# Introduction and Background Section



Some of the common misconceptions about case-studies are that they cannot be used for theory generation and scientific advancements. That generalization is not possible. Or, that they are good for hypothesis generation only. Although it is known that these are only misconceptions (Fyvbjerg, 2006).

Case studies where the cases are selected without much consideration can easily fall into all these categories.

This makes the selection of the case an important step in the process.



# Introduction and Background section



The onus is on the reader to provide good evidence that the case described is of importance to Science.

A good discussion on how to select a case is shown in Seawright and Gerring (2008).

# Introduction and Background section

## Classification of Types of Cases

This classification of types of cases consists of the following :

- Typical
- Diverse
- Extreme
- Deviant
- Influential
- Most Similar
- Most Difference

# Introduction and Background section



## Definition of Typical Case:

- A typical case is representative, and exemplifies a stable relationship with other cases.

# Introduction and Background section

## Definition of Diverse Cases:

- A diverse case includes cases that between themselves feature the maximum variance along all relevant dimensions.
- If diverse cases are observed, a case-study will investigate at least two cases.

# Introduction and Background section

## Definition of Extreme Case:

- To be classified as an extreme case, a case needs to feature extreme values of one of its variables, either dependent or independent.

# Introduction and Background section

## Definition of Deviant and Influential Cases:


- A deviant case shows a surprising value of one of its variables, while an influential case is a case that influenced a definition of a model of a casual relation.

# Introduction and Background section

## Definition of Most Similar and Most Different Cases:

- They are those cases exhibiting either most similar, or most different values in one or more dimensions of interest.

# Introduction and Background section



After the selection of the cases has been explained and elaborated in the case-study report, we suggest that some description of the relevant Western medical condition(s) and TCM syndrome(s) be given.

This is just general information on both perspectives that will inform the reader, regardless of his/her expertise or level of experience.



# Introduction and Background section

This section should be answer questions such as:

- What are the Western medical conditions relevant to this case, and what are their descriptions?
- What are the TCM syndrome(s)/pattern(s) relevant to this case, and what are their descriptions?
- What are the similarities and/or differences between the perspectives taken by Western medicine and TCM in relation to the condition(s)/syndrome(s) in this case?

# The case section




The case section of the report starts with a description of why the patient has come to see the practitioner, and ends with the (individualized) treatment plan for the patient.

# The case section

The description of why the patient has come to visit the practitioner should include:

- Patient's Chief Complaint (CC)
- Present Illness (PI)
- Past Medical History (PMH)
- Family History (FH)
- Psychosocial History (PSH)
- Review of Systems (ROS)

# The case section



After the verbal interaction with the patient, which is generally known as “ The Ten Questions” , and “ History Talking” in Western medicine, the Physical Examination follows.

# The case section

The Physical Examination consists of:

- Inspection/Observation: includes tongue
- Palpation: includes pulse
- Special Tests: these are tests introduced from Western Physical Examination

# The case section

## Important

All of the previously collected data, whether verbal ( History Talking) or physical (Physical Exam), need to be recorded using both TCM terminology as well as Western medicine terminology so as to benefit all parties involved in healthcare.

# The case section

TCM: Syndrome Differentiation

WM: Differential Diagnosis

- After carrying out the History and Physical Exam, the patient's condition should be clarified according to “Syndrome Differentiation in (TCM), and Differential Diagnosis ( Western medicine), and mentioned in corresponding terms.

# The case section

## Treatment

- All forms of treatment provided to the patient should be mentioned with clear reasoning.
- It should be mentioned which form of treatment is the principal and which is complementary, if the patient is undertaking both Western and TCM treatment, simultaneously.
- Any other form of treatment or healing the patient is receiving at the time needs to also be included.



# The Discussion Section

- The author should elaborate on the reasons underpinning the outcomes of the case.
- The discussion on why the case was a success or failure should take place in this section.
- This is the section where all the information should be put together in one meaningful whole, including the practitioner's earliest assumptions through to the final conclusion, and how they affected the treatment plan and its variation.

# The Discussion Section


- Lastly, in the discussion section the benefits of the research regarding this case-study report should be highlighted.
- Guidelines for future research in the area, should be mentioned in this section.
- Any practical application of the knowledge acquired through this research should be discussed in this segment.

# The Conclusion Section

The Conclusion Section is very much reflected in the ABSTRACT of any research article, and serves as a summary of all highlighted points raised and brought forward in the previous section.

But :

# The Conclusion Section



Rather than just repetition of what has already been mentioned in detail, in this section the author should provide a meaningful summary of the highlighted points, and provides suggestions on how to move forward, in order to make any way for future improvement.

# Conclusion

- We have provide a set of guidelines to be considered when writing a TCM case-study report.
- The guidelines are structured information to be similar to that of a Western medicine case-study report in structure, as well as reference to Western medical terms, and therefore rendering it more accessible, meaningful, and applicable for all healthcare providers.