Reviewer's report

Title: Case managers for older persons with multi-morbidity and their everyday work - a focused ethnography

Version: 1 Date: 5 September 2013

Reviewer: Lianne Jeffs

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Major Revisions

Although an interesting read I have conceptual, methodological, and interpretation areas that require attention.

Conceptual Issues

Case management is not a new phenomenon - as both US and Canada have national associations with clear competencies/roles delineated. As the details on how many years of experience the case managers have in their current role - it is not clear how "new" of a role for those who participated in the study is. In the background there is reference to this CM model implemented being different from others - yet this is not described in detail. There are several key studies not included that use intensive case management as a comprehensive strategy with the elderly population from the US (Coleman et al., Naylor et al.) that need to be considered.

Methodological Issues

More details are required on the following: 1) How did you determine what to observe? 2) How did you arrive at the 3 thematic domains of inquiry for the interview guide? 3) Why did you use PhD students to test out an interview guide that would be used with case managers - are they representative of the case managers? 4) How were participants recruited - e.g. purposeful sampling? 5) How many years in current role? 6) With one observer - the issue of lack of inter-rater reliability of observations needs to be addressed in the limitations as biases may exist with only one observer. 7) How saturation was achieved requires more explanation. 8) How you triangulated the data requires more description and recommend you pull what you have in limitations section and go deeper in your explanation - did you do cross comparison analysis? How did what they said differ from what was observed? 9) Who conducted the interviews? 10) Why did the 3 other team members only review a sample of interviews? 11) Who participated in reviewing the field notes - was it only the main author?

Presentation of Results/Interpretation Issues

Overall I have challenges with the main theme "creating a new professional identity" as the way the story unfolds in the results section does not have the
theoretical rich narrative text/field notes to support. The use of the term profession is well written about and the role of case managers do not have a unique body of knowledge that would distinguish them from health care professions (who are mainly regulated), however they do have a set of competencies that are required to enact in their daily practice. There is more support as currently written for results to reflect the challenges that case managers have to overcome (and the inherent tensions of being an 'outsider') with those in the system - organizations, providers, and patients and their family members/caregivers - which is mainly captured under the adjusting to familiar work in an unfamiliar role. The data excerpts that are included in the first sub-theme do not necessarily align with the narrative description and are often short in nature (e.g. page 11 second paragraph - unclear how the filed not elucidates "service-mindedness" page 13 second paragraph). It is not clear how the second theme around improvement or third theme around trust/advocacy link to the overall theme of a "new professional identity" This requires a deeper dive into analysis as currently written does not substantiate the first statement in the discussion "continuous process of creating a new identity". Overall the results section is written vaguely and incorporating specific examples throughout in the narrative (in addition to the quotes and field notes) will enhance this paper.

Given my issues with the presentation and interpretation of the results - the discussion section that focuses mainly on the main theme of professional identity requires re-working. As mentioned there is a body of knowledge around professional identity in health care professions that are not currently included in this paper and how the result on the interaction of the CMs on their assignments is professional identity is weak - to me this is more of interactions to discuss what tasks need to be completed and consultation. The Yau et al reference to "unclear boundaries of professional accountability" seems more what your results are (vs professional identity. The discussion on system improvement should include the large body of knowledge around quality and system integration performance.

Implications for clinical practice need to align with the specific findings and currently are vague and not cross-referenced with what has already been done globally.

**Level of interest:** An article whose findings are important to those with closely related research interests

**Quality of written English:** Not suitable for publication unless extensively edited

**Statistical review:** No, the manuscript does not need to be seen by a statistician.