POLICIES & PROCEDURES MANUAL
For Standardized Patients

Revised: January 2017
In effect as of: February 15th, 2017

STANDARDIZED PATIENT PROGRAM
CENTRE FOR SIMULATION-BASED LEARNING
McMaster University, HSC 1M1
1280 Main Street West, Hamilton, ON L8S 4K1
Phone: 905-525-9140 ext. 20267, 22388, 22355, 22138, 21593
Fax: 905-540-9383
Web: http://simulation.mcmaster.ca

Email:
  simpats@mcmaster.ca
  macspss@mcmaster.ca
  trainsp@mcmaster.ca
  trainer@mcmaster.ca
  spadmin@mcmaster.ca
  niagspp@mcmaster.ca
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>TABLE OF CONTENTS</td>
<td>2</td>
</tr>
<tr>
<td>PREAMBLE</td>
<td>4</td>
</tr>
<tr>
<td>THE PROGRAM AT McMaster</td>
<td>4</td>
</tr>
<tr>
<td>IMPORTANT NOTE REGARDING THE TERM “STANDARDIZED PATIENT”</td>
<td>4</td>
</tr>
<tr>
<td>LOCATIONS</td>
<td>5</td>
</tr>
<tr>
<td>MULTIPLE SP PROGRAMS/CAMPUSANES</td>
<td>5</td>
</tr>
<tr>
<td>PROGRAM STAFF &amp; CONTACT INFO</td>
<td>6</td>
</tr>
<tr>
<td>HAMILTON MAIN SITE</td>
<td>6</td>
</tr>
<tr>
<td>NIAGARA REGION</td>
<td>6</td>
</tr>
<tr>
<td>WATERLOO REGION</td>
<td>6</td>
</tr>
<tr>
<td>BECOMING A STANDARDIZED PATIENT</td>
<td>7</td>
</tr>
<tr>
<td>ABBREVIATIONS &amp; TERMINOLOGY</td>
<td>8</td>
</tr>
<tr>
<td>MANDATORY REQUIREMENTS OF AN SP</td>
<td>11</td>
</tr>
<tr>
<td>FOR ALL SPs:</td>
<td>11</td>
</tr>
<tr>
<td>McMaster Graduate Students</td>
<td>11</td>
</tr>
<tr>
<td>MULTIPLE JOB ASSIGNMENTS AT McMaster</td>
<td>11</td>
</tr>
<tr>
<td>PROFESSIONAL CONDUCT</td>
<td>13</td>
</tr>
<tr>
<td>CELL PHONE USAGE</td>
<td>14</td>
</tr>
<tr>
<td>APPROPRIATE ATTIRE</td>
<td>14</td>
</tr>
<tr>
<td>COMMENTS &amp; CONCERNS</td>
<td>14</td>
</tr>
<tr>
<td>HOURS OF WORK / BOOKING OFFERS</td>
<td>15</td>
</tr>
<tr>
<td>SELECTION CRITERIA</td>
<td>16</td>
</tr>
<tr>
<td>OFFERING/SCHEDULING PROCESS</td>
<td>16</td>
</tr>
<tr>
<td>RIGHT TO REFUSE / DECLINE OFFERS</td>
<td>17</td>
</tr>
<tr>
<td>INACTIVITY</td>
<td>17</td>
</tr>
<tr>
<td>LATE ARRIVALS, “NO SHOWS” AND CANCELLATIONS</td>
<td>17</td>
</tr>
<tr>
<td>USER CANCELLATION OF BOOKING</td>
<td>18</td>
</tr>
<tr>
<td>IN THE EVENT OF A UNIVERSITY CLOSURE</td>
<td>18</td>
</tr>
<tr>
<td>TRAINING</td>
<td>19</td>
</tr>
<tr>
<td>FEEDBACK</td>
<td>19</td>
</tr>
<tr>
<td>SIMULATIONS</td>
<td>19</td>
</tr>
<tr>
<td>PRIOR TO SIMULATION</td>
<td>19</td>
</tr>
<tr>
<td>DURING A SIMULATION</td>
<td>20</td>
</tr>
<tr>
<td>Physical Examination</td>
<td>20</td>
</tr>
<tr>
<td>POST-SIMULATION</td>
<td>20</td>
</tr>
<tr>
<td>Complete Quality Assurance Form</td>
<td>20</td>
</tr>
<tr>
<td>Personal Debriefing after a Simulation</td>
<td>20</td>
</tr>
<tr>
<td>PAYMENT FOR SERVICES</td>
<td>21</td>
</tr>
<tr>
<td>SUBMISSION OF HOURS WORKED</td>
<td>21</td>
</tr>
<tr>
<td>PAY STATEMENTS</td>
<td>21</td>
</tr>
</tbody>
</table>

POLICIES & PROCEDURES MANUAL For Standardized Patients 2017

2

STANDARDIZED PATIENT PROGRAM
CENTRE FOR SIMULATION-BASED LEARNING
McMaster University, HSC 1M1
1280 Main Street West, Hamilton, ON L8S 4K1
Phone: 905-525-9140 ext. 20267 Fax: 905-540-9383
Web: http://simulation.mcmaster.ca
PREAMBLE

The following Policies and Procedures have been developed by the Standardized Patient Program (SPP) and are applicable to all members of the Program working as Standardized Patients (SPs). A hard copy of the Policies and Procedures can be found in the Centre for Simulation-Based Learning (CSBL), and a PDF version is available at http://simulation.mcmaster.ca/sp_information.html

* Niagara and Waterloo SPs should refer to the manual specific to those sites.

Inquiries, or requests, can be directed to simpats@mcmaster.ca. Updates and revisions to the Policies and Procedures will be noted via email to all members.

THE PROGRAM AT McMaster

The Standardized Patient Program (SPP) is a sub-division of the Centre for Simulation-Based Learning (CSBL) and coordinates the use of standardized patients. A standardized patient is a healthy person who is trained to realistically and accurately reproduce a history, physical and/or emotional scenario that a real patient would present with. Standardized patients provide faculty and students opportunities to teach, assess, and refine a variety of skills, including communication, interview, diagnostic, and clinical skills.

The Standardized Patient Program is a fundamental resource for curriculum needs within the Faculty of Health Sciences. It provides a unique learning environment that is risk-free and controllable.

The Standardized Patient Program also provides resources to external agencies for the purpose of training or evaluation, primarily in the administration of clinical examinations.

IMPORTANT NOTE REGARDING THE TERM “STANDARDIZED PATIENT”

Please note that in regards to this manual, and all aspects of the Standardized Patient Program, the term Standardized Patient, or SP, is all-encompassing (Gynecological Teaching Associate, Gynecological Standardized Patient, Male Urogenital Standardized Patient etc.) unless otherwise indicated.
# LOCATIONS

## MULTIPLE SP PROGRAMS/CAMPUSES

The SPP currently operates at three sites: Hamilton, Niagara and Waterloo. Please note that each site is run as a distinct individual program. Although under one main umbrella, each site is administered differently to meet the needs of that specific location.

An SP must apply to each program individually, as acceptance into one site/campus does not indicate acceptance into all three.

If you elect to apply and are accepted to more than one site/campus, please treat them as separate entities in regards to queries, payments, booking information etc.

<table>
<thead>
<tr>
<th>Hamilton (primary office)</th>
<th>Main campus – McMaster University</th>
<th>McMaster University Medical Centre 1200 Main St W., HSC 1M1 Hamilton ON L8N 3Z5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Niagara Region</td>
<td>McMaster Niagara Regional Campus (NRC) &amp; Brock University</td>
<td>Cairns Complex, Brock University 500 Glenridge Ave St Catharines ON L2S 3A1</td>
</tr>
<tr>
<td>Niagara College</td>
<td></td>
<td>Welland Campus, Niagara College 300 Woodlawn Rd Welland ON L3C 7L3</td>
</tr>
<tr>
<td></td>
<td>St. Catharines General Hospital</td>
<td>1200 Fourth Ave. St Catharines ON L2S 0A9</td>
</tr>
<tr>
<td>Waterloo Region</td>
<td>McMaster Waterloo Regional Campus (WRC)</td>
<td>Michael G DeGroote School of Medicine 10B Victoria St S., IHB 2022 Kitchener ON N2G 1C5</td>
</tr>
</tbody>
</table>

*For Policies and Procedures pertaining to our Regional Programs, please contact the appropriate staff, as listed under Program Staff & Contact Info.*
# PROGRAM STAFF & CONTACT INFO

## HAMILTON MAIN SITE

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Director</td>
<td>Dr Matthew Sibbald</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant Director</td>
<td>Dr Janice Harvey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrator</td>
<td>Leigh Norman</td>
<td><a href="mailto:norman@mcmaster.ca">norman@mcmaster.ca</a></td>
<td>905-525-9140 ext22958</td>
</tr>
<tr>
<td>SPP Assistant, H.R./Payroll Inquiries</td>
<td>Christina Ballarano</td>
<td><a href="mailto:spadmin@mcmaster.ca">spadmin@mcmaster.ca</a></td>
<td>905-525-9140 ext22138</td>
</tr>
<tr>
<td>Intake Reception, General &amp; Booking Inquiries</td>
<td>Sandra Maga</td>
<td><a href="mailto:simpats@mcmaster.ca">simpats@mcmaster.ca</a></td>
<td>905-525-9140 ext20267</td>
</tr>
<tr>
<td>SPP Administrative Assistant</td>
<td>Sabrina Press</td>
<td><a href="mailto:macsps@mcmaster.ca">macsps@mcmaster.ca</a></td>
<td>905-525-9140 ext21593</td>
</tr>
<tr>
<td>SP Trainer</td>
<td>Mo Ibrahim</td>
<td><a href="mailto:trainsp@mcmaster.ca">trainsp@mcmaster.ca</a></td>
<td>905-525-9140 ext22388</td>
</tr>
<tr>
<td>SP Trainer</td>
<td>Tyler Brent</td>
<td><a href="mailto:trainer@mcmaster.ca">trainer@mcmaster.ca</a></td>
<td>905-525-9140 ext22355</td>
</tr>
<tr>
<td>General Clinical Exam Inquiries</td>
<td></td>
<td><a href="mailto:spadmin@mcmaster.ca">spadmin@mcmaster.ca</a></td>
<td>905-525-9140 ext22138</td>
</tr>
</tbody>
</table>

## NIAGARA REGION

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intake Reception, General &amp; Booking Inquiries</td>
<td>Sandra Maga</td>
<td><a href="mailto:simpats@mcmaster.ca">simpats@mcmaster.ca</a></td>
<td>905-525-9140 ext20267</td>
</tr>
<tr>
<td>SP Trainer</td>
<td>Mo Ibrahim</td>
<td><a href="mailto:niagspp@mcmaster.ca">niagspp@mcmaster.ca</a></td>
<td>905-525-9140 ext22388</td>
</tr>
</tbody>
</table>

## WATERLOO REGION

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP Trainer and All Inquiries</td>
<td>Aaron Sousa</td>
<td><a href="mailto:sousaa@mcmaster.ca">sousaa@mcmaster.ca</a></td>
<td>519-584-0719 ext21124</td>
</tr>
</tbody>
</table>
BECOMING A STANDARDIZED PATIENT

The position of a Standardized Patient (SP) does not require a medical or acting background, and we encourage a diverse demographic of applicants. Applications are accepted online, and will be reviewed and selected for interview based on demographic needs. All applications will be kept on file for one year, if we are not actively hiring at the time the application was submitted.

Since the SP position is that of a casual employee, SPs must be aware that they are unlikely to have any routine or specific schedule. Casual employees do not have guaranteed hours per day, nor days of work per week; they are contacted when work is available, at which time they may elect to accept or decline the work opportunity. This makes the position very flexible and ideal for a student, a retiree, or any person looking to augment their income with a position that offers flexibility in their schedule.

Interested SPs should complete and submit an on-line application form found on our website at http://simulation.mcmaster.ca/interested_in_becoming_an_sp.html. Note: All SPs must have a valid email address, which they check on a regular basis.

Special Circumstances:

- We do not hire current full-time McMaster employees as SPs for internal sessions. Full-time McMaster employees may apply to be placed in our external event database (please see definitions in the Abbreviations and Terminology section).
- Casual or part-time McMaster employees are eligible for employment with the SPP. Please see Mandatory Requirements of an SP for more details.
Standardized Patient Program (SPP) – The administrative program responsible for recruiting, hiring, training and supporting all SP functions.

Standardized Patient (SP) / Standardized Client (SC) - A Standardized Patient (SP) is a healthy person, trained to realistically and accurately reproduce a history, physical and/or emotional scenario which a healthcare professional may encounter in practice. SPs provide faculty and students opportunities to teach, assess, and refine a variety of skills, including communication, interview, diagnostic, and clinical skills. History or communication skills may be used in conjunction with physical examination.

In some cases, depending on the user, SPs may be referred to as Standardized Clients (SCs). Unless specifically noted, anywhere the term Standardized Patient or SP is used, it should be assumed to apply equally to Simulated Patients or Standardized Clients.

Physical Exam SP (PESP) - An SP required for physical examination skills practice where no particular scenario is used. Physical exams may include:
- Vital signs: temperature, blood pressure, pulse
- Head, eyes, ears, nose, mouth, throat
- Upper body: head, neck, chest, abdomen, back, underarms
- Extremities and joints: arms, hands, legs, feet
- Inguinal: the creases on either side of the groin area where the legs meet the torso

‘Physical Exam’ SPs are not used for genital, breast or rectal examinations.

Physical Exam SP with Exposure (PESPEx) - Bookings in which an SP should expect to have sensitive areas exposed for the purpose of the exam. Example: performing an ultrasound on the femoral arteries may require exposure of the buttocks. Note that the sensitive areas are not to be examined, only that they may be exposed to allow for the proper exam.

Spare SP – An SP scheduled as a back-up, in case of another’s illness etc.

Men’s Health Program (MHP) - The Men’s Health Program (MHP) is a practical, hands-on learning educational program provided by the Standardized Patient Program (SPP) for health care professionals (primarily undergraduate medical students) in the area of men’s health. The learners have the opportunity to develop the clinical skill set necessary to perform digital rectal, genital and testicular exams. The program is comprised of Male Urogenital Standardized Patients (MUSPs) and Male Urogenital Teaching Associates (MUTAs).

Male Urogenital Standardized Patient (MUSP) - A Male Urogenital Standardized Patient (MUSP) is a male standardized patient who, in addition to acting as a standard Physical Exam SP, also allows learners to perform digital rectal, and external genital exams under the instruction and supervision of a medical tutor/facilitator.

** COMING SOON: Male Urogenital Teaching Associate (MUTA) - A Male Urogenital Teaching Associate (MUTA) is an SP who is trained to provide instruction and guidance to learners on how to perform digital rectal, genital and testicular exams, utilizing their own bodies.
Women’s Health Program (WHP) - The Women’s Health Program (WHP) is a practical, hands-on learning educational program provided by the Standardized Patient Program (SPP) for health care professionals (usually Obstetrics and Gynecology students, Registered Nurses, Registered Practical Nurses, Nurse Practitioners, Physician Assistants, and Midwives) in the area of women’s health. The learners have the opportunity to develop the clinical skill set necessary to perform breast and pelvic assessments. The program is comprised of Gynecological Teaching Associates (GTAs), Gynecological Standardized Patients (GSPs), and Breast Exam Standardized Patients (BESPs).

Breast Exam SP (BESP) - A Breast Exam Standardized Patient (BESP) is a female Standardized Patient (SP) who, in addition to acting as a standard Physical Exam SP (PESP), also allows learners to perform breast exams under the instruction and supervision of a medical tutor/facilitator.

Gynecological Standardized Patient (GSP) - A Gynecological Standardized Patient (GSP) is a female Standardized Patient (SP) who, in addition to acting as a standard Physical Exam SP (PESP), also allows learners to perform breast, vaginal, and digital rectal exams under the instruction and supervision of a medical tutor/facilitator.

Gynecological Teaching Associate (GTA) - A Gynecological Teaching Associate (GTA) is an SP who is trained to provide instruction and guidance to learners on how to perform breast and pelvic/speculum examinations, utilizing their own bodies. Note: GTAs do not provide rectal exams.

Centre for Simulation-Based Learning (CSBL) – The two Centres that are home to the SPP on the first floor of McMaster Children’s Hospital. CSBL 1M, the original Centre nearest the blue elevators, and CSBL 1G, the new Centre which opened in 2014, nearest the red elevators.

Standardized Patient Trainer (SPT) - The Standardized Patient Trainer (SPT) is responsible for the recruitment, screening, and training of Standardized Patients (SPs) for the Standardized Patient Program (SPP).

Simulation – Where a standardized patient realistically and accurately reproduces the history, physical and/or emotional medical scenario that a real patient would present with.

Booking – The offer and setting for a simulation. Bookings for simulation include the date, time, location, and case information for the SP, tutor and learners.

Internal - Internal bookings are considered to be for programs within McMaster University (E.g. Medical School, Nursing, Bachelor of Health Science, etc.), including the satellite campuses.

External Event/Booking - External events are those where the SPP is contracted by an external agency, such as the Medical Council of Canada. These events are not associated with any particular program within the University. Many of the SPP Policies and Procedures do not apply for external events, such as feedback training, pay rates, or parking. However, the SPP expects the same professional conduct and standards from SPs when participating in external events.
Learners – Refers to all levels of health professionals, from first year students, to residents and practicing professionals. In some instances, learners may be from fields outside of healthcare.

Tutor/Preceptor – The individual, usually a faculty member, who oversees the teaching/learning objectives within the booking. They will instruct the learners, and may guide the SP during the session.

Feedback – The patient’s perspective on the interaction with the learner.

Learning Space (LS) also referred to as CAE – LS is an integrated software system which allows for recording and review of sessions, as well as the incorporation of feedback and assessment tools.

Objective Structured Clinical Exam (OSCE) – An examination designed to test clinical skills, and competency in areas such as communication.

Quality Assurance (QA)/Quality Improvement (QI) – Various processes and methods used to evaluate the quality and standardization of a particular case scenario and/or SP(s).
MANDATORY REQUIREMENTS OF AN SP

The items listed below (as found in Appendix 1) are mandatory in order to receive any booking offers:

FOR ALL SPs:

- A completed online application.
- A valid email address, which they check every 24 hours at minimum.
- An interview.
- A completed hiring package. Please note that all required documentation must be completed in order to receive payment.
  - For non-residents of Canada, a copy of a valid work permit is required; or a copy of permanent residency card if permanent status in Canada has been granted.
- A Participation and Consent Form must be signed and submitted.
- A photograph taken by the SPP must be on file for each SP. Updated photos may be requested on occasion.
- Mosaic account access enabled.
- Completion of the Orientation and Feedback sessions.
- Ministry of Labour Worker Health and Safety Awareness Training Certificate http://www.labour.gov.on.ca/english/hs/training/workers.php, or McMaster EOHSS Health and Safety Training. Please note we are not able to accept trainings specific to other employers.

MCMASTER GRADUATE STUDENTS:

- Full-time McMaster graduate students may work a maximum of 505 hours/academic term, as per McMaster’s School of Graduate Studies policy ( http://graduate.mcmaster.ca/resources ).
- It is the student’s responsibility to keep track of these hours and decline any offers that would put them in excess of the maximum allotted hours.

MULTIPLE JOB ASSIGNMENTS AT McMaster:

Individuals may hold multiple part time or casual appointments at the University. The University is considered one employer: all hours worked by individuals who hold more than one University appointment must be counted together for the purposes of calculating overtime entitlement under the Employment Standards Act, 2000 (the ESA), regardless of whether the hours are worked in different Faculties/Departments/or bargaining units.

- As per the ESA, “for most employees … overtime begins after they have worked 44 hours in a work week”. The 45th hour and beyond would be considered overtime hours.

Hiring managers are not always aware of an employee’s multiple appointments, and this may result in the individual working beyond the overtime threshold as stated in the ESA. Hiring managers do not knowingly employ individuals in multiple appointments in which the accumulated hours worked each day or week in all positions exceed the overtime threshold.
For this reason, we do not hire any individual who holds a full-time appointment in another Faculty or Department at McMaster University. Any SP who acquires a full-time position elsewhere in the University after becoming an SP must inform the SPP office, and the SP will be removed from our internal roster.

We will hire/keep on our roster individuals who hold another part-time or casual appointment in another Faculty or Department at the University so long as:

- The SP keeps their hiring managers informed of their multiple assignments
- The SP keeps track of their hours
- The SP declines work that would put them into the overtime category

In the event of a repeated overtime payment, due to non-disclosure or inaccurate tracking of total hours by the SP, the SP will be removed from the internal SP roster.
PROFESSIONAL CONDUCT

The Standardized Patient Program (SPP) expects the following from all members of the SPP, including full-time staff, users of the SPP, and our SPs:

- To exhibit professional and ethical behaviour at all times.
  - Derogatory remarks, verbal/physical threats or any other form of abuse or harassment will not be tolerated as this is in violation of the University’s policies and codes of conduct.
  - Adherence to all Human Resource and Health & Safety Policies including (but not limited to) the McMaster Anti-Discrimination Policy and the McMaster University Workplace Violence Policy.
- To treat others with respect and consideration.
- To demonstrate responsibility and reliability.
- To look continuously for ways to improve the performance of duties.
- To demonstrate accountability, including appropriate assumption of responsibility and reporting of inappropriate behaviours.
- To work well with, and show respect to, all individuals.
- To respect the authority and knowledge of other professionals.
- To admit errors and accept responsibility for actions.
- To follow proper hygiene and personal care at all times with adherence to McMaster’s scent-free policy. Scented products most commonly include the following:
  - Personal hygiene products (e.g., shampoo, conditioner, hairsprays, deodorants, colognes, after-shaves, fragrances, perfumes, lotions, soaps, cosmetics and creams);
  - Industrial and household chemicals and cleaners;
  - Air fresheners (e.g., deodorizers, potpourri, oils and candles); and
  - Various household products.
- To have sensitivity and respect for others, including their beliefs, opinions, sex, gender identity or expression, ancestry, colour, race, culture, religion, sexual orientation, disability or status.
- To adhere to rules regarding confidential information as described on page 28.

Standardized Patients (SPs) are specifically expected to:

- Be respectful to all individuals, including other SPs, staff, students and faculty.
- Identify yourself as the Standardized Patient upon arrival when participating in simulations.
- Be punctual for all sessions – be in role, prepared to begin portrayal at your scheduled time.
- Be cognizant of your behaviour between sessions; be aware of the nature and noise level of your conversations, as these may be overheard by, or be distracting to, others.
- Portray each role as trained.
- When requested, provide feedback as trained - objectively, and honestly.
• Protect the privacy of students/examinees by not discussing their performance with anyone except those directly associated with the booking.
• Protect the security of case materials by not discussing the role or sharing case material with anyone other than the SPP or staff/faculty directly associated with the booking.
• Keep secure any exam/evaluative cases, and return them to the SPP Program upon completion of the booking.
• Inform the SPP of any possible professional and/or personal conflicts of interest with faculty, physicians, tutors, students or staff, as defined on page 28.
• Be receptive to constructive feedback from the SPP staff, tutors, and other SPs.
• Contribute in a positive manner to the reputation and morale of the SPP, the CSBL, and the University.
• Be respectful of others’ (learners, faculty, staff, and fellow SPs) time, not only in arrival for sessions, but also during your wait times between sessions.

CELL PHONE USAGE

Cell phone use is prohibited, except in the lobby or SP waiting room. Audio/video recording is strictly prohibited at all times.

APPROPRIATE ATTIRE

SPs are expected to be dressed in clean, well maintained clothing (unless the specifics of the case require differently). Casual is acceptable, however, it should always be neat and tidy. Keep in mind that SPs are representatives of the SPP and McMaster University.

COMMENTS & CONCERNS

Any feedback, comments, questions or concerns should be brought to the SPP staff in a timely manner. Be private, constructive, and respectful – after all, we are training others in communication skills.

Disrespectful or inappropriate comments towards or about others, of any nature, will not be tolerated. Concerns about the performance or attitude of others should be brought directly to SPP staff.
HOURS OF WORK / BOOKING OFFERS

An SP is considered to be a ‘casual’ employee of the University. Such employees have no specific schedule and employment may be of indefinite duration. A casual employee has neither guaranteed hours per day, or days of work per week; rather, they are contacted when work is available at which time they may elect to accept or decline the work opportunity.

- There is no set schedule of hours; hours may be booked during the day, evening, or weekend and for differing lengths of time.
- The frequency of work will depend on the need for a given demographic (age, gender, physical attributes), abilities, and cases which have been requested by faculty (please see Selection Criteria section on next page).
  - The same applies for receiving offers for external bookings (as defined on page 8).
- The SP will be contacted for bookings solely through the email address provided to the SPP. Booking offers may be sent to multiple SPs simultaneously, and positions will typically be filled on a “first come first served” basis.
- The SPP reserves the right to find “best fit” for a given booking.
- All requirements, as listed in the Policies & Procedures Manual; under the section of Mandatory Requirements of an SP (page 11), must be met before any booking offers are made to an SP.
- SPs may decline booking offers when unavailable or if they are uncomfortable with the scenario involved. However, once a booking offer is accepted, we do expect the SP to follow through with their commitment.
- For SPs who are also McMaster students, bookings for evaluative sessions will not be offered if the request comes from the program in which the SP is enrolled. Those working in specialized SP roles (Men’s and Women’s Health), will not be offered bookings of any kind for the program(s) in which they are enrolled.
- On occasion, SPs may be asked to simulate multiple scenarios in one booking. This need will be indicated in the booking offer.
- To ensure safety and quality assurance, various caps on the number of physical exams and the length of sessions involving physical exams or a high physical/emotional/mental demand have been determined. This includes, but is not limited to:
  - Physical Exam SP bookings can be limited to a 4 hour booking time. This policy also applies to other cases considered to be too demanding for long hours, as determined by the SPP and based on feedback from SPs.
  - GTAs are limited to a maximum of 8 pelvic exams per day, with 30 minutes allotted per exam.
    - Exams are limited to a maximum of 4 before a 30 minute unpaid break.
    - 15 minutes will also be allotted for introduction to pelvic sessions, as required by the requesting programs.
    - If breast exams are required, an additional 15-30 minutes will be allotted, dependant on number of students.
  - MUSPs are limited to a maximum of 6 digital rectal exams (DRE) exams per day/session. External genital/testicular exam caps will vary, based on individual comfort levels.
  - Note: GSP exam limits have not yet been defined.
Occasionally, bookings may run longer than scheduled and the user may ask the SP to stay later than the time they have been booked for. The SP may choose to stay, at their own discretion, as SPs are not obligated to stay past the time they were booked for. The exception to this would be for the time cap applied to sessions involving physical exams to ensure safety and quality assurance. Please refer to Payment for Services regarding extended time.

SPs are to simulate only the case they have been trained and scheduled for. In the event a tutor requests an SP to perform a case other than what they were confirmed for, the SP is to respond as follows: “I am only prepared to simulate the case which was requested and for which I was confirmed. We are selected based on specific requirements and training, in order to perform to the standards set by the SP Program.”

It is important that the SP submit a QA form (appendix 9) any time this occurs.

SELECTION CRITERIA

Individual booking offers are sent to SPs based on a variety of criteria, such as:

- Case specifications (age, gender, ethnicity, physical appearance or other characteristics)
- Case requirements (difficulty in affect etc.)
- Experience in specific components (e.g. feedback, physical techniques)
- Performance history
- Learner level of experience
- Demonstrated professional conduct
- User/client preference (Users may request or decline a specific SP)

OFFERING/SCHEDULING PROCESS

All booking offers will occur by email. The initial recruitment email will include the following information:

- Date/time
- Site/building location
- Case number and Title
- Program requesting the SP
- Tutor/Instructor name
- Special instructions, if applicable

Upon receiving responses from interested SPs, SPs will be assigned to openings and sent confirmations via email.

A booking offer does NOT constitute a confirmation of work— an email confirming the booking will be sent to the scheduled SPs.
RIGHT TO REFUSE / DECLINE OFFERS

No SP will be penalized for declining an offer. SPs have the right to refuse offers based on availability, discomfort with content, or any other reason, and no reason must be given. However, we ask that all SPs respond to offers received, even if not available.

INACTIVITY

Though SPs are free to decline any offer, if an SP does not respond to requests for a period of three months, they will be moved to an ‘inactive’ list. If the SP does not respond to requests for a period of six months, they will be removed from our roster, and their contract will be terminated.

If, for any reason, an SP must temporarily remove themselves from the roster, but wish to continue in future, simply inform a member of the SPP staff. Please advise us, via email, of an effective date and anticipated return date. In these instances, the SP will NOT be removed from our databases, instead, will be put in a ‘holding’ file, until we receive notice of intent to return.

If the absence period will be greater than six months, the SP will need to be rehired at the time of return.

LATE ARRIVALS, “NO SHOWS” AND CANCELLATIONS

The SPP tracks all late arrivals, cancellations and ‘no-shows’. Each late arrival, cancellation or ‘no-show’ will be reviewed on a case-by-case basis. High instances of late arrivals, cancellations and/or ‘no-shows’ will result in the SP(s) receiving fewer booking offers and/or termination of their contract.

The expectation is that all SPs will arrive 15 minutes prior to booking start time.

A late arrival is defined as not being ready to simulate for the start time scheduled in the booking offer.

- Late arrivals will be docked pay for the amount of time the booking was delayed due to the late arrival.

A cancellation (by SP) is defined as an SP who did not attend their booking, but provided the SPP with a minimum of 3-hours’ notice (where possible) of their intent not to attend.

A no-show is defined as an SP who did not attend their scheduled booking without notifying the SPP or cancelling within 3 hours of the booking start time.

- In the event that an SP is unable to attend their booking on short notice, it is essential that Trainers and the Intake/Reception are contacted via phone (ext. 21593, 20267, 22388, 22355) and email. The SP team works varying hours and the SPP staff member who confirmed the booking may not be in the office at the scheduled time.
USER CANCELLATION OF BOOKING

In the instance that an SP is cancelled for a confirmed booking, by request of a user or by the SPP:

- The SPP will provide the SP with as much notice as possible, both by email and phone.
- The SP must acknowledge the cancellation, by email and phone.
- In the instance that a booking is cancelled with 24 hours’ or MORE notice, the SP will NOT receive payment for the scheduled booking.
- If a booking is cancelled with LESS than 24 hours’ notice, the SP will receive full payment for the hours they were scheduled, with the exceptions as noted in the section below: University Closure.

IN THE EVENT OF A UNIVERSITY CLOSURE

ALL bookings, on and off campus, are automatically cancelled when the University campuses are closed due to weather. It is the SP’s responsibility to check the University’s open/close status. Closures are communicated via the Daily News (http://dailynews.mcmaster.ca/), on the University’s Facebook and Twitter sites, and by Hamilton media (radio and television). Although every effort is made to confirm a closure by 5:30am, if weather conditions change throughout the day, the University may close at any point.

If there is no specific announcement about McMaster being closed, then the University remains open.

If the University does not close in inclement weather, SPs are responsible for determining if weather conditions may make their travel to attend a booking and return home unsafe. Should an SP decide not to attend a booking due to weather, they must notify the SPP as soon as possible, via phone and email. Should the SP elect to not attend the booking, they will not receive payment.

If SP bookings are cancelled due to any other circumstance beyond our control, the SPP will contact you by phone and email as soon as possible. SPs will NOT receive payment for bookings that are cancelled due to University closures or any other circumstance beyond our control, regardless of timeframe.
TRAINING

Once hired, SPs are required to attend a mandatory orientation session. This orientation includes a detailed overview of the SP program along with job expectations and requirements. In addition to the orientation session, SPs are required to attend a feedback training session. Both orientation and feedback sessions must be completed before commencing case training and bookings.

As the SP program encompasses a large variety of cases, each with specific requirements, SPs are matched with cases on a continuing basis and trained as needed. During case training sessions SPs are taught how to portray character affects and ailments as well as how to respond appropriately to questions from learners.

SPs are NOT to change their portrayal from that which they were trained.

FEEDBACK

All SPs are trained to deliver feedback to learners from a patient’s perspective. This is a valuable tool that provides learners with information regarding how their communication and/or actions affect a patient’s experience. Feedback is to be provided only if requested by the tutor, and SPs are not expected to provide feedback on the clinical accuracy or healthcare knowledge of a learner.

SIMULATIONS

PRIOR TO SIMULATION

All SPs booked for sessions on main campus, during office hours, must first come to 1M. Upon arrival SPs are required to:

- Check-in
- Obtain parking pass (if required)
- Get further details about booking location (if not in 1M)
- Pick up gowns or other props required for simulation

It is essential that ALL SPs sign in at 1M before any session on campus. The SPP needs to be aware of who has arrived, and prepare for replacement of any late or absent SPs.

For after-hours or off campus bookings, SPs are expected to arrive at the pre-determined location, ready to simulate for the booking start time. The SPP will provide the SP with any emergency contact numbers provided by the requestor.
DURING A SIMULATION

SPs can expect that a tutor will always be on-site when a simulation is underway (with the exception of GTA/MUTA bookings). Before the start of the session, SPs are to communicate with the tutor to establish the grounds of simulation and ask if feedback is desired.

Once the simulation has begun, SPs are to follow tutor instructions and remain in the designated location. If at any time, an SP is asked to portray something other than that for which they were booked, they are to decline, and will need to contact the SP Office for further instructions.

Physical Examination

SPs simulating as warm bodies for physical examination must come prepared to a session in a gown, with shorts and undergarments underneath. It is expected that:

- Tutors and learners will take proper measures to protect the SPs modesty and privacy through proper draping.
  - SPs understand there may be some brief, but appropriate, exposure to access areas of the body that will be examined.
- Learners will wash their hands before beginning to examine an SP.

SPs are NOT expected to:

- Cooperate with inappropriate behaviour from the learner or tutor.
- Endure pain during the physical examination.
- Be examined and exposed without proper draping.
  - Undergarments should not be asked to be removed. SPs being used for more invasive examinations (Men’s and Women’s Health etc.) will come prepared appropriately for those specific exams.

SPs are trained to respond immediately to inappropriate behaviours in order to maintain a safe simulation environment.

POST-SIMULATION

Complete Quality Assurance Form

Please see section on Quality Assurance.

Personal Debriefing after a Simulation

It is very common for an SP to feel both the mental and physical effects of a simulation, even after it’s over. As such, it is important for SPs to take time to debrief after each session.

Please refer to your Training Orientation Manual for debriefing techniques.
PAYMENT FOR SERVICES

SUBMISSION OF HOURS WORKED

- Pay is processed on a bi-weekly pay schedule. To view more details, follow this link to the Payroll Cut-off Calendar: [http://www.workingatmcmaster.ca/hris/employee/index.php](http://www.workingatmcmaster.ca/hris/employee/index.php)
- Hours of work will be tracked by the SPP for payment purposes.
  - With the exception of all Men’s Health and Women’s Health Program sessions, all sessions will be paid a minimum of 1.5 hours and the SP is expected to stay for the entire duration. Men’s and Women’s Health sessions do not have a minimum time allotment.
  - If an SP’s booking is made up of multiple sessions with short breaks (less than 30 minutes) in-between the simulations, the SP’s pay will be processed as a single time slot from the start of the first session to the end of the last session. This only applies to multiple sessions within one single booking, with only one program.
    - If an SP signs up for multiple bookings where there are less than 30 minutes between bookings, or with various programs, they will not be paid for that in-between period.
  - In the event that a booking is finished earlier than scheduled, payment will be made for the full amount of time the SP was scheduled for.
  - In the event that a booking runs longer than originally scheduled, the SP will be required to submit an Extended Time Form (appendix 3) within 7 calendar days of the booking to receive a pay adjustment. This form may be left in the drop slot in either 1M or 1G.
  - Pay adjustments will be made for late arrivals.
  - In the event that the SPP must shorten the length of a booking and notifies the SP with at least 24 hours’ notice, the SP will only be paid for the new shorter duration. If the SPP changes the booking time with less than 24 hours’ notice given to the SP, the SP will be paid for the duration originally confirmed.

PAY STATEMENTS

Pay statements are accessible electronically on McMaster’s Mosaic HR information system.
- A MAC ID is required to login to Mosaic. Please refer to Appendix 4 for instructions on how to activate a MAC ID.
  - Note, a MAC ID is NOT the same as a McMaster employee ID number.
- To access pay statements, follow the instructions in Appendix 5.

It is the SP’s responsibility to verify deposit amounts against their pay statement, and any pay discrepancies should be brought to the attention of the SPP Assistant as soon as possible. In order for the pay queries to be completed, please ensure all information listed in Appendix 6 is provided.
T4s

There are two ways to receive a T4:

1. By accessing them through Mosaic, mid-February of each year. Please see appendix 7 for further instructions on how to do this.

2. By mail from the University to the address on file every year at the end of February. If not received by mid-March, please contact the SPP Assistant.

It is the responsibility of the SP to ensure any address or contact information changes are sent, by email only, to the SPP Assistant at spadmin@mcmaster.ca.

PARKING AND TRAVEL EXPENSES

Please note, it is always a good idea to be prepared for the cost of parking in the event that a pass cannot be obtained. Please see details below.

PARKING

The SPP will cover the cost of SP parking for training and simulation sessions as follows:

- Coverage only includes underground parking at McMaster University Medical Centre – The SP must present their entrance ticket from the parking garage for it to be validated by SPP Staff, and the SP will be required to sign for the receipt of a parking pass. We cannot reimburse SPs who park in university or public lots.
- Parking passes may be picked up upon checking in.
- If the session is scheduled after hours at a location other than 1M or 1G, parking passes will be taped on the front door of 1M.
- If the session is scheduled after hours in 1M or 1G, passes will be on the SP board.
- If, for any reason, an SP is not able to obtain a pass and they pay for parking out-of-pocket, it is essential that a receipt is obtained to submit for petty cash reimbursement. Parking costs will not be reimbursed without a receipt.
- Please note that the parking pass provided will cover the length of the booking, plus an additional 30 minutes to allow for entering/exiting the lot. The SPP will not provide parking for purposes outside of bookings with the SPP.

Off-site sessions:

- On occasion, SPs are booked for sessions outside of McMaster. The SP is responsible to pay the up-front cost of parking and must submit a receipt to the SPP for reimbursement from the petty cash fund. Receipts must be submitted in person, to the SPP Assistant. Parking costs will not be reimbursed without the receipt.
TRAVEL

In the event that an SP is asked to attend a booking off of McMaster Campus:

- The SP will be reimbursed for mileage through petty cash. The kilometre allowance will be equal to Canada Revenue Agency’s automobile allowance set for each calendar year. Rates can be found at this link: http://www.cra-arc.gc.ca/tx/bsnss/tpcs/pyrl/tnfts/tmbl/lwnc/ntls-eng.html
- Mileage is based upon “Google Maps”, from McMaster (1280 Main St W., Hamilton) to the location of the session and return to McMaster University. The SPP cannot accept odometer readings for mileage.
- The SP will be reimbursed, with cash, upon the submission of the Mileage Claim Form (appendix 8).
  - Mileage claim forms can also be found in the SP waiting room, or on the SPP website.
  - The form must be completed in its entirety before being submitted. Unsigned or incomplete forms will not be processed.
  - Mileage claim forms must be submitted within seven calendar days of when it was accrued.
  - Forms are to be submitted in person to the SPP Assistant for immediate reimbursement.
  - Please pre-arrange a date/time to come in to collect reimbursement.

- The SPP does NOT compensate for travel or passenger time.
- On occasion, some off-campus offers may have transportation provided, at the sole discretion of the SPP. This will be clearly stated in the offer. In this instance, mileage is not paid to the SP. If the SP elects to decline the transportation, and instead drive themselves, they will not be reimbursed for mileage.
QUALITY ASSURANCE (QA) / QUALITY IMPROVEMENT (QI)

The Standardized Patient Program aims to ensure quality in three areas: the SP portrayal, the case content, and the environment. The SPP is committed to providing users with SPs who are clinically accurate and able to successfully portray the historical, physical and emotional features of an actual patient. The SPP strives to provide content that is current, accurate and relevant. The SPP is also committed to providing SPs a safe, comfortable, and enjoyable environment to work in.

In order to successfully achieve these goals, the SPP has an active system of quality control measures in place, primarily composed of feedback forms and simulation monitoring.

The SPP will take a multi-faceted approach to Quality Assurance:

- Through direct observation during training sessions
- Through direct and indirect observation during simulations (random and/or scheduled)
- Through review of LearningSpace recordings
- Through distribution and collection of feedback forms

An SP whose conduct and/or performance is consistently below the standards set by the SPP may require retraining, remediation or may be terminated from their employment contract.

OBSERVATION

Simulation monitoring/observation by the SPP may occur in person, via a one-way mirror, or via review of recorded sessions. The SP may be notified ahead of time, but in most cases the monitoring is conducted without the prior knowledge of the SP. The goal of monitoring is to assess the preparedness and quality of the SP as well as the quality of the case itself. (Note: Men’s and Women’s Health observation will only occur in person).

Observation, for Quality Assurance purposes, will be conducted by an SP Trainer or the Assistant Director.

QA FORMS

Quality Assurance (QA) forms are available for users of the SPP (Quality Report on SP) and SPs (SP Quality Report on Simulation).

All QA forms are reviewed by the SPP and any issues identified will have appropriate actions taken. Actions may include:

- Review and revision of the case content
- Review and revision of SP training
- Feedback to academic program administrators in regards to feedback from SPs on SPP users
- Simulation monitoring of a particular case or SP (in response to a feedback form)
For the SP to complete – “SP Quality Report on Simulation”: (Appendix 9)

Used to provide ongoing assessment of:

- The SP’s overall experience during a booking
- The SP’s interactions with the tutor
- The SP’s training experience
- Any constructive feedback regarding the SP program, case content, etc.

For the tutor to complete – “Quality Report on SP”: (Appendix 10)

Used to provide ongoing assessment of:

- The preparedness and punctuality of the SP
- The quality and realism of the case itself and the SP
- The quality of feedback provided, if any

The SP is NOT to complete this form themselves – only the portion regarding their name and case information should be filled out by the SP, if asked.

*Quality Report on SP* forms will be sent to the requestor with the booking request confirmation email.
ADDITIONAL POLICIES AND INFORMATION

FOOD/DRINKS, PERSONAL EFFECTS AND ELECTRONICS

The Standardized Patient Program’s (SPP) policy on food, drinks, personal effects, and electronics during simulation is intended to maintain the consistency and quality of the simulations, as well as the cleanliness of the facilities. The policy applies to all Standardized Patients (SPs), SPP staff, and users of the SPP facilities.

No food or drinks are to be brought into any SP session (unless it is required by the scenario.) Any food or drink brought by the SP is to be left in the 1M1 SP waiting room and is only to be consumed on a break, and then properly disposed of in receptacles provided. SPs should not expect that snacks, drinks or a meal will be provided at a booking unless it is specifically mentioned in the booking offer from the SPP.

Please note that food is not permitted in any area of 1G, nor in the clinic rooms of 1M.

Personal effects should be stored outside of the room. If an SP must keep their personal effects with them, such as when off-site, the personal effects should be placed out of sight within the room and must not be used at any time during the scheduled session. Personal effects are not permitted in any exam/OSCE simulations (no exceptions), and should be left at home or in the car, as secure spaces may not always be available. The SPP is not responsible for any lost, damaged or stolen items; SPs are solely responsible for their own belongings.

NO cell phones or other electronics are to be used during any training or simulation session. Such activity has the potential to disrupt an educational or assessment session. Cell phones and electronics must be turned off and out of sight. Any reports of such activity will result in potential removal from the SPP.

IN CASE OF INJURY

A session should be stopped immediately if an injury or sudden illness occurs, and faculty and/or SPP staff should be immediately informed.

The SP will be paid for the remainder of the booking. The SP is to inform the SPP office if they are unable to attend future bookings due to the injury/illness.

Please note there will not be payment for future shifts that are missed.

Reporting of Injury

In the event of an injury, the SP is to fill out an “Injury/Incident Report” form (obtained from SPP staff) and submit to the CSBL management within 24 hours of the injury. CSBL management will then submit the form to McMaster’s Faculty of Health Sciences Health and Safety office. This is the process to follow if an SP just wishes to report their injury, but nothing further is required (i.e. no medical intervention).
If the SP chooses/is required to visit their doctor or be seen in the emergency department, then the “Injury/Incident Report” form must be completed within 72 hours of the injury and submitted to CSBL management. The form will then be forwarded to McMaster’s Occupational Health and Safety and WSIB. WSIB will subsequently be in touch with the SP for further management.

UNINTENDED DISCOVERY/INCIDENTAL FINDINGS

In the event that during an examination of an SP by a learner an incidental physical finding is noted, the following policy should be followed:

An emergency finding requiring immediate medical attention (e.g. elevated BP, fainting, sudden onset shortness of breath etc)
   a. The learner or SP reports the findings to the supervising tutor who then arranges for immediate medical attention.
   b. The tutor reports the situation to the SPP Manager as soon as possible.
   c. The SPP Manager will determine the next steps in the reporting process (e.g. Health & Safety Office etc.)

*The tutor is not responsible for treatment, but for the transfer of care and follow up with the SPP*

Non emergent findings which do not necessitate immediate medical attention (e.g. lump in abdominal area etc):
   a. The learner reports the findings to the supervising tutor, who then discusses this with the SP in private at the end of the session.
   b. The Tutor will encourage the SP to seek the appropriate medical follow-up, i.e. visit GP.

CONFIDENTIALITY

An SP must keep all scenarios, procedures, communications, student performance, and other related information of the SPP, confidential. The copyright of all materials belongs exclusively to the SPP, and these materials must be kept secure. All information regarding materials belonging to the SPP, including scenario content, training discussions, and recruitment information are to only be discussed with the SPP Staff. Upon request of the SPP, SPs are to return all printed materials.

This policy also extends to discussions amongst SPs, who should be cognizant of the confidentiality agreement and keep said discussions to a minimum.

CONFLICT OF INTEREST

A conflict of interest occurs when competing or multiple interests, usually concerning a perceived benefit, arise for an individual. A conflict of interest within the SPP may arise if an SP has a personal relationship with a learner, faculty, or staff member, in any capacity. In this instance, it is imperative that the SP inform the SPP of said conflict, so measures can be implemented to minimize the impact of the conflict.

Please be advised that external events will address conflict of interest on an individual basis, per event.
CHAPERONES AND OBSERVERS (Men’s and Women’s Health)

Recruit Observer

Individuals who have expressed interest in becoming a GTA or MUTA, and who have been screened, interviewed, and watched any training videos relative to the role, are required to observe a GTA/MUTA session as the next step in their training.

The GTA/MUTA being observed will be notified in advance (minimum of 1-2 days) of the presence of this observer.

The observer is not to interfere with the session in any way, and should hold any questions until after the session.

Chaperone

In the event that only male learners (Women’s Health), or only female learners (Men’s Health), or a single learner of either gender, will be present in the room, a chaperone must also be present. This is for the safety and protection of both the GTA/MUTA and the learner.

The chaperone is not there to view the GTA/MUTA; they will sit at the head of the bed, and are not to interfere with the session in any way.

Every effort will be made to inform the GTA/MUTA of a chaperone’s presence in advance of the session, though this cannot be guaranteed. A chaperone may be either staff from the CSBL/SPP or the requesting department, or another GTA/MUTA.

PERSONAL INFORMATION & PHOTOGRAPHS

In order to provide appropriate SPs for given scenarios and to provide administrative/payroll services to SPs, it is necessary for the SPP to maintain specific personal information regarding SPs, including, but not limited to: address and contact information, banking information, proof of eligibility to work in Canada, health issues, physical attributes etc. A photograph maintained on file by the SPP will be used solely for the purpose of recollection and recruitment, by the staff of the SPP.

Information gathered by the SPP will only be used for the purpose for which it was collected. Information will be maintained and stored by the SPP as a physical file and/or in electronic format. This information will be maintained for the duration of the SP’s employment, and will be removed from the SPP files at the SP’s request. Personal information will not be published, distributed, or otherwise shared with anyone other than staff and management of the SPP.

An SP’s first name and the initial of their last name may be provided to the requesting program, however, no contact info will be provided without prior consent from the SP.
SP information will only be used in accordance with privacy legislation and will only be disclosed with the SP’s consent, or where required by law. Storage, retention, and destruction of your personal information will comply with existing privacy legislation and McMaster University’s Privacy Policy. Further information can be found here: www.mcmaster.ca/univsec/fippa/FIPPA_Statement.pdf

**VIDEOTAPING AND OBSERVATION**

(Note: Men’s and Women’s Health sessions will not be videotaped.)

Scenarios may be videotaped and/or observed. Videos of scenarios will be used solely for educational purposes. Students, SPP and staff and Faculty at the applicable campuses may view videotaped sessions. Faculty and students may view videotaped sessions in which they were involved, or which involved students/faculty from their program.

The SP understands that some simulations will be videotaped or observed for educational, assessment, and/or quality assurance purposes by the faculty and staff. An SP may be observed or appear in a videotaped session without prior notice. The SP will only be identified by case name and no personal information will be referenced. These recordings remain the property of McMaster University and are not available to the SPs.

Special media productions such as films, print, or other productions that are not part of the regular SPP or affiliated with any education activity will have a separate consent form to be signed.

Please note: The SPP is not affiliated with nor follow any rules or guidelines associated with ACTRA (Alliance of Canadian Cinema, Television and Radio Artists), or Equity (The Actor’s Equity Association).

**LearningSpace**

The CSBL is outfitted with cameras in every room, linked to LearningSpace. LearningSpace, by CAE Healthcare, is an audiovisual system with a recording option for performance assessment. LearningSpace will be used to record sessions, either for educational purposes at the request of the users, or for the purpose of quality assurance by the SP Program. These videos are secure, and will not be used for any purposes outside of education, evaluation, or quality assurance, without the prior consent of every individual in the recording.
CHANGES TO CONTACT INFO OR EMPLOYMENT STATUS at McMaster

It is essential that any changes to an SP’s contact info (email, phone or home address) be sent via email to spadmin@mcmaster.ca. The SPP will then ensure that all information is updated with Human Resources and the payroll department.

The SP is also responsible for informing the SPP of any change in employment status within McMaster University. Any and all positions taken within the University must be reported to us for payroll purposes.

CONTRACT RENEWALS

All SPs are hired with a yearly contract end date of April 30th, though contracts may be terminated at any time throughout the year. The SPP will automatically renew the contract, except upon request for termination by the SP, in any case of professional misconduct, or at the discretion of the SPP. Contracts are automatically terminated if you are inactive for a period of six consecutive months or greater, even if you have expressed that you wish to remain on the roster. After this period, the SP will need to be rehired.

RECORD of EMPLOYMENT

A Record of Employment (ROE) can be provided when an employee:

- Quits her/her job
- Is laid off/terminated
- Has had within the last 52 weeks or since the last ROE, seven consecutive calendar days without both work and insurable earnings from the employer.

If an ROE is required, please contact spadmin@mcmaster.ca. The SPP will then advise Human Resources of the request and HR will prepare the ROE electronically to be accessed via Service Canada’s “My Service Canada Account”. More details can be found here: http://www.workingatmcmaster.ca/link.php?link=hris:hris-Record%20Of%20Employment
Appendix 1 – SP MANDATORY REQUIREMENTS CHECKLIST

Applicant Name: ________________________________

<table>
<thead>
<tr>
<th>Item</th>
<th>Completion Date</th>
<th>Filed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Valid email address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed Hiring Package</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participation &amp; Consent Form read and signed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Photograph</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee ID obtained and sent to SP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mosaic Account Enabled – MAC ID activated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion of orientation session</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion of feedback training session</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ministry of Labour Health &amp; Safety Awareness Training Certificate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-residents: copy of work permit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permanent residents: copy of permanent residency card</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Appendix 2 – ROLE DESCRIPTIONS & MINIMUM HOURS PAID

<table>
<thead>
<tr>
<th>Requirement/Role (SP = Standardized Patient)</th>
<th>Description</th>
<th>Minimum Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP</td>
<td>Trained with associated scenario; communication, history taking etc</td>
<td>1.5 hours</td>
</tr>
<tr>
<td>Physical Exam SP</td>
<td>&quot;Warm body&quot;</td>
<td>1.5 hours</td>
</tr>
<tr>
<td>Physical Exam SP w/exposure</td>
<td>Physical exam SP where sensitive areas may be exposed</td>
<td>1.5 hours</td>
</tr>
<tr>
<td>Back-Up/Spare SP</td>
<td>Trained and prepared to simulate</td>
<td>1.5 hours</td>
</tr>
<tr>
<td>Training</td>
<td>*Men’s or Women’s Health sessions differ - see below</td>
<td>1.5 hours</td>
</tr>
<tr>
<td>Dry-run</td>
<td>Primarily for evaluative bookings, as requested by users</td>
<td>1.5 hours</td>
</tr>
<tr>
<td>Gynecological Teaching Associate</td>
<td>Provides pelvic and breast examinations (no rectal), with instruction (in lieu of tutor or preceptor)</td>
<td>n/a</td>
</tr>
<tr>
<td>Gynecological SP</td>
<td>Provides pelvic, breast and/or rectal exams, under the instruction of a tutor or preceptor</td>
<td>n/a</td>
</tr>
<tr>
<td>Male Urogenital Teaching Associate</td>
<td>Provides genital/testicular and rectal examinations, with instruction (in lieu of tutor or preceptor)</td>
<td>n/a</td>
</tr>
<tr>
<td>Male Urogenital SP</td>
<td>Provides genital, testicular, and/or rectal exams, under the instruction of a tutor or preceptor</td>
<td>n/a</td>
</tr>
<tr>
<td>Breast Exam SP</td>
<td>Female breast exam, under the instruction of tutor or preceptor</td>
<td>n/a</td>
</tr>
<tr>
<td>GTA/MUTA observer or chaperone</td>
<td>GTA/MUTA in training (observer) or person chaperoning a session</td>
<td>n/a</td>
</tr>
<tr>
<td>GTA/MUTA training observer</td>
<td>Experienced GTA/MUTA supporting newer GTA/MUTA session</td>
<td>n/a</td>
</tr>
<tr>
<td>External Events</td>
<td>Defined at time of offer</td>
<td>n/a</td>
</tr>
</tbody>
</table>
Appendix 3 - EXTENDED TIME FORM

Standardized Patient

Extended Time

Employee Name: ____________________________
Date Submitted: ____________________________

NOTE TO TUTOR/PRECEPTOR/FACULTY:
You are signing this form to indicate that the Standardized Patient assigned to your booking worked longer than originally requested.
The Program will be charged for these hours, and you may receive an email for verification.

<table>
<thead>
<tr>
<th>DATE</th>
<th>CASE</th>
<th>PROGRAM</th>
<th>START TIME</th>
<th>ACTUAL END TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| SIGNATURE |
| of tutor, preceptor or Faculty |

| EMAIL |
| of tutor, preceptor or Faculty |

Employee Signature: ____________________________

OFFICE USE ONLY

Pay Period:

Training: Sim: TA: HMSP: HFSP:
Appendix 4 – ACTIVATE YOUR MAC ID / CREATE A MOSAIC ACCOUNT

1. Go to this link:
   https://mosaic.mcmaster.ca/psp/preprdr/EMPLOYEE/MCM_PSFT_BO/c/MCM_CUSTOM_MENU_MCM_MACID_ACTIVATE.GBL

2. Enter your Person ID (aka employee ID number), Barcode Number and Date of Birth, and then click Submit.
   Note: Your Person ID and Barcode Number will be sent to you by the SPP Assistant after your hiring has been completed.

There will be some further instructions to follow on the screen asking you to create a password and security questions/answers. Remember your password as you will need it to log into Mosaic each time.
FORGOTTEN MAC IDs/PASSWORDS

If you forget your MAC ID or password after the initial activation, you are able to reactivate or reset by going to the Mosaic log-in page and following the prompts on the screen after clicking “What’s my MAC ID or password?”
Appendix 5 - ACCESS YOUR PAY STATEMENTS

After you have activated your MAC ID, you will be able to log in to Mosaic in order to see your pay statements.

Access Mosaic here: https://epprd.mcmaster.ca/psp/prepprd/?cmd=login

1. Enter your MAC ID and password in the appropriate fields.

2. Once you are logged in, your screen should look something like this:

Click the “Pay” box.
3. You will then be brought to this page where you will be able to click anywhere on the line for your actual statement (where you will see your hours and dollar amount deposited into your bank account).

![Pay Statement Image]

It is common that your internet browser will block your pay statement from popping up the first time you try to open one. If this happens, you are to “allow pop-ups” on Mosaic’s site.

**Appendix 6 - PAY QUERIES: REQUIRED INFORMATION**

You are encouraged to review your pay statements with every pay. If you think an error was made, you can contact the SPP Assistant at spadmin@mcmaster.ca.

Please be prepared with:
- Your pay statement (a copy or screen shot)
- A list of all dates & times you worked within the pay period in question

Please note, SPP staff are not able to access your pay statements, you must provide them to us. Instructions can be found in appendix 5.
Appendix 7 - ACCESS YOUR T4 TAX SLIP ELECTRONICALLY

First, log into your Mosaic account.

On the home screen, click on the NavBar to get to the Navigator:

Then, click through the options in this order:
Navigator > Human Resources > Self Service > Payroll and Compensation > T4/T4A Consent

On this screen, check the box to submit your consent to receive your T4 electronically, then click Submit:
T4/T4A Consent

Submit or withdraw your consent to receive electronic T4 and T4-A slips.

You can use the Check Box below to submit your Consent to receive Electronic T4 and T4A slips covering payments issued from Human Resources, and which appeared on McMaster pay statements. If you do not elect for electronic slip delivery, your year-end slips will be mailed to the home address on file at the time of issue. If you consent to electronic slip delivery, no paper slip(s) will be mailed to you. A Consent to receive Electronic tax slips will remain in effect until you submit a Withdrawal of Consent. You must Consent to electronic slip delivery in order to view your electronic tax slip(s) online. If you have any questions, please contact the Human Resources office for your area.

Your Current Status  No consent received.

☐ Check here to indicate your consent to receive electronic T4 and T4A slips.

Submit

You will be prompted to enter your password to confirm your identity.

Once complete, you will get this message:

Submit Confirmation

✔ The Submit was successful.

OK
Appendix 8 - MILEAGE CLAIM FORM

Please complete and return form to:
Standardized Patient Program
McMaster University
1200 Main St W, HSC 1M1
Hamilton ON L8N 3Z5

905-525-9140 ext. 22138
spadmin@mcmaster.ca
Fax: 905-540-9383

Name: ____________________________________________

Date: ____________________________________________

Travel from: McMaster University, 1280 Main Street West, Hamilton, ON L8S 4K1

Travel to: ____________________________________________

Purpose: ____________________________________________

Employee ID #: ____________________________________________

Signature: ____________________________________________

*** If you have parking expenses please attach receipt. Parking will not be reimbursed without a receipt***

Office Use Only

Total Kms travelled: _________ x _________/km = $___________

Total Expenses = $___________

Signature of Approving Officer: ________________________
### SP QUALITY REPORT ON SIMULATION

**Standardized Patient:**
- Name: ___________________________
- Case #: __________________________
- Program: __________________________
- Date: __________________________

**Have you simulated this case before?**
- Yes
- No

**When were you trained?**

#### 1) BOOKING

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Did the booking start on time?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Did the booking finish early?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Did the booking exceed the time you were scheduled for?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Were you asked to provide feedback?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Was SP time used sufficiently?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Did you feel comfortable in the space/set-up of the session? (If &quot;No&quot;, please provide specifics below):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Were the physical exams conducted in a professional manner? (e.g. Appropriate draping, only non-invasive exams performed, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 2) INSTRUCTOR/TUTOR/PRECEPTOR

<table>
<thead>
<tr>
<th></th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Were you asked to make any changes to the case role?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Were you asked to do something you were not prepared for?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. How were you treated by the tutor?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### 3) TRAINING & CASE

<table>
<thead>
<tr>
<th></th>
<th>Poor</th>
<th>Okay</th>
<th>Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Punctuality and organization of training</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>b. Quality of training</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>c. How prepared did you feel to simulate after training?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>d. How well does the case cover the information students were asking?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

**Comments:**

_________________________

_________________________
## QUALITY REPORT ON STANDARDIZED PATIENT

<table>
<thead>
<tr>
<th>Standardized Patient to Complete:</th>
<th>Clinical Instructor to Complete:</th>
<th>Application of SP:</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP Real Name:</td>
<td>Clinical/Year Name:</td>
<td>□ Physical Exam only</td>
</tr>
<tr>
<td>SP Case #:</td>
<td>Program:</td>
<td>□ History taking/interviewing only</td>
</tr>
<tr>
<td>Date:</td>
<td></td>
<td>□ Both</td>
</tr>
</tbody>
</table>

### 1) Please rate the quality of this Standardized Patient:

<table>
<thead>
<tr>
<th></th>
<th>Needs to be retrained</th>
<th>Needs to be reviewed</th>
<th>Changes Needed</th>
<th>Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Reality of the SP (e.g., affect, appropriate responses, etc.)</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>b. Feedback given by SP</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>c. Was the SP prepared?</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>d. Did the SP arrive on time?</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
</tbody>
</table>

If you give this SP a three or below, please identify the specific challenge(s) that should be reviewed:

Comments:

### 2) Please rate the quality of the Scenario/Case:

<table>
<thead>
<tr>
<th></th>
<th>Not at all</th>
<th>Somewhat</th>
<th>Changes Needed</th>
<th>Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Did the case meet your learning and educational objectives?</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>b. Is the case current and relevant?</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
</tbody>
</table>

### Do you think the case objectively evaluates the following skills?

<table>
<thead>
<tr>
<th></th>
<th>Not at all</th>
<th>Somewhat</th>
<th>Changes Needed</th>
<th>Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. History</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>b. Physical</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>c. Discussion of management plans</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
<tr>
<td>d. Diagnosis</td>
<td>1 ☐</td>
<td>2 ☐</td>
<td>3 ☐</td>
<td>4 ☐</td>
<td>5 ☐</td>
</tr>
</tbody>
</table>

If you have rated the case as a three or below, please provide comments. How do you feel the case could be improved?

Comments:

Appendix 11 – STANDARDIZED PATIENT PROGRAM PARTICIPATION & CONSENT FORM

**Please note that the term Standardized Patient, or SP, is all-encompassing (GTA, GSP, BESP, MUTA, MUSP etc.) unless otherwise indicated.**

As a Standardized Patient (SP) of McMaster University’s Standardized Patient Program (SPP), I ____________________________________________________________________________________________, hereby understand, acknowledge and agree as follows:

1. I will conduct myself in a professional manner and be respectful of others at all times.
2. I will act morally and ethically in all interactions as a representative of the SPP and the University.
3. I will maintain professional standards including, but not limited to, reliability, promptness, objectivity, flexibility and commitment to the learners.
4. I understand that SP work is occasional, and I am not guaranteed any number of hours of work.
5. All questions pertaining to my employment as an SP shall be directed to the staff of the SPP.
6. I agree to keep all scenarios, procedures, communications, and other related information of the SPP confidential. I understand that the copyright of all materials belongs exclusively to the SPP, and agree to keep these materials secure. All information regarding materials belonging to the SPP, including scenario content, training discussions and recruitment information will only be discussed with the SPP staff, and the individuals who have requested our services.
   a. I understand that this policy also extends to discussions amongst SPs, who should be cognizant of the confidentiality agreement and keep said discussions to a minimum.
7. Upon request of the SPP, I agree to return all printed materials.
8. I understand that as part of SPP ongoing quality assurance, all SPs can expect to be observed by SPP staff while simulating, with or without advanced notice.
9. I understand that some simulations will be videotaped or observed for educational, assessment, and/or quality assurance purposes by the faculty and staff. Special media productions such as films or other productions that are not part of the regular SPP will have a separate consent form to be signed. Note: This will not apply to any Men’s or Women’s Health sessions.
10. I consent to having my photograph taken to form part of my file with the SPP, to be used for identification purposes by the SPP to assist in memory recall, and to ensure suitability for specific case material.
11. I agree to inform the SPP if I am currently employed, or become employed, by McMaster University, in any capacity, outside of the SPP.
   a. I agree to decline booking offers which will cause me to surpass 44 work hours in one week at McMaster, across all job appointments.
12. I understand that I am to act as an SP in the role(s) for which I am specifically trained, as trained, and to simulate only that which I was booked for.
13. I agree to refrain from working as a Standardized Patient in an assignment for any McMaster University program in which I am currently enrolled.
15. It is my sole responsibility to inform the SPP of any possible professional and/or personal conflicts of interest. This would include: having a close, personal or familial relationship to any student within the Faculty of Health Sciences, a tutor or physician, or a staff member.

16. I understand that I will be interviewed and/or physically examined by students or health professionals in the same manner that would occur if I were an actual patient/client.

17. In a physical examination, I can expect to be provided with appropriate draping and privacy, bearing in mind that these are some of the skills that we are helping the learners to acquire and they may require our patience and constructive feedback as they learn.
   a. For Men’s and Women’s Health bookings, this may include, but not be limited to, physical examination procedures/maneuvers that are normally part of a breast and/or pelvic exam and genital and/or rectal exam. Note: GTAs do NOT provide rectal exams.

18. I understand that I can refuse any booking, without penalty, if I am unavailable, or feel uncomfortable with the topic.

19. I understand that I may be required to provide feedback to students, tutors and/or staff of the SPP.

20. As an SP, I can expect:
   a. To be treated with respect and consideration.
   b. To be informed in advance of the nature and purpose of the simulation.
   c. Timely responses from the SPP to my requests/inquiries.
   d. To receive feedback from the SPP if my work needs improvement.

21. I agree that I have read this manual in its entirety, and will bring forth any questions I may have regarding its contents.

I have read this Participation & Consent Form, and that my signature below constitutes acceptance of the all of the terms and conditions stated herein. I understand that the Standardized Patient Program holds this agreement in the strictest confidence and will take disciplinary measures if I violate these policies.

Printed Name: ____________________________________________

Signature: ________________________________________________

Date: ____________________________________________________

SPP Staff Signature: ________________________________________