

POLICIES & PROCEDURES MANUAL

For **USERS** of Standardized Patients

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**STANDARDIZED PATIENT PROGRAM
CENTRE FOR SIMULATION-BASED LEARNING**

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TABLE OF CONTENTS

TABLE OF CONTENTS	2
PROGRAM STAFF & CONTACT INFO	3
HAMILTON	3
NIAGARA	3
INTRODUCTION.....	4
STANDARDIZED PATIENTS AT McMASTER	5
ABOUT OUR SPS	5
HOW ARE STANDARDIZED PATIENTS USED?.....	5
WHO MAY REQUEST AN SP?	5
SP REQUESTS FOR COURSES AND CONTINUING EDUCATION.....	6
SP REQUESTS FOR EXTERNAL EXAMS	6
NON EDUCATIONAL REQUESTS FOR SPs.....	6
BOOKING PROCEDURE.....	7
ONLINE BOOKING FORM.....	7
FIRST AND SECOND CHOICES	7
CONFIRMATIONS	7
REQUESTS FOR SPECIFIC SPS.....	8
SP EQUIPMENT & SUPPLIES	8
CASE SCENARIOS.....	9
CUSTOM SCENARIOS FOR OSCEs or EVALUATIVE CONTENT.....	9
SP PORTRAYAL	9
TRAINING	9
DRY RUNS.....	10
SIMULATION	10
WARM BODY or HEALTHY ADULT PORTAYALS.....	10
FEEDBACK BY SP.....	11
SP LATE ARRIVALS/ABSENCES.....	11
ABSENT SPS.....	11
QUALITY ASSURANCE.....	12
SP FEEDBACK ON TUTORS/PRECEPTORS/FACULTY.....	12
COSTS & PAYMENTS	13
INVOICING.....	13
CANCELLATION OF AN SP (BY THE REQUESTOR OR THE PROGRAM).....	14
SPs NOT BOOKED BY THE SPP	14
RESPONSIBILITIES.....	15
CONFIDENTIALITY	15
PROFESSIONAL CONDUCT.....	15
RECORDING OF SESSIONS	16
SCENT FREE POLICY	16
CONFLICT OF INTEREST AGREEMENT	16

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HAMILTON

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INTRODUCTION

The Policies and Procedures in this manual have been developed by the Standardized Patient Program (SPP) and are applicable to all users of Standardized Patients (SPs).

1. To ensure standards in education and assessment:
 - a. To sustain and continually improve a program of academic excellence in the use of simulation (in its various forms) in health professions education.
 - b. To determine best practices for simulation-based learning and assessment, and facilitate/ensure the adoption of these practices by McMaster's educational programs.
2. To maintain an outstanding Standardized Patient Program for the benefit of McMaster programs and learners:
 - a. To recruit, train, and ensure the highest standards in the use of standardized patients in healthcare education and assessment at McMaster.
 - b. To implement a program of quality assurance to maintain/improve the quality of SP training.
3. To support research involving simulation in healthcare, health sciences and health professions education:
 - a. To develop sustainable and supportive policies and practices which facilitate research into simulation in healthcare.
 - b. To collaborate with researchers within, and external to, FHS to further the frontier of knowledge as it relates to simulation in healthcare and healthcare professions education.
4. Instructor/faculty training and development:
 - a. To develop and deliver faculty development programs through collaboration with faculty and external collaborators to ensure that McMaster's faculty receive the best and most current.
 - b. To maintain standards of faculty practice in the use of simulation.
 - c. To gather and share feedback from learners on faculty performance.
5. Accreditation:
 - a. To operate the Centre and its programs in a manner consistent with established accreditation standards on a continual basis.
6. Network hub for simulation activities in Hamilton

A copy of the *Policies and Procedures for Users of Standardized Patients* can be found in the Centre for Simulation Based Learning, as well as on our website, <http://simulation.mcmaster.ca>.

Inquiries and further clarification can be directed to simpats@mcmaster.ca. Updates and revisions made to the Policies and Procedures will be noted via email to all users, as well as posted on the website.

For specifics regarding the Policies & Procedures applicable to the SPs, please see our website.

STANDARDIZED PATIENTS AT McMASTER

ABOUT OUR SPS

We are able to provide a wide range of SPs, aged 16 to over 80, of varying nationalities and a range of physical characteristics. SPs are selected for admittance into the program based on the need for their demographic, and a standard interview process. All SPs are required to submit a police check, and undergo mandatory training and feedback sessions before they are able to simulate.

For each given scenario, the SPs are selected based on their fit for the requested demographic, physical traits, and their availability. Our SPs are prepared for scenarios involving medical history taking, counselling, and physical exams, or basic “warm body” situations. SPs are NOT to be used for any invasive procedures.

The SPP will collaborate with the Centre for Simulation Based Learning, High Fidelity Simulation Team if a requestor desires a scenario which utilizes both methods. We are also able to provide Pelvic Teaching Associates to provide female pelvic and breast examinations. Please contact the Administrator for further information regarding Pelvic Teaching.

We are able to accommodate most any request for scenarios within our catalogue. Very specific needs can be met if enough lead time is provided for us to recruit SPs who may not already be on our roster.

HOW ARE STANDARDIZED PATIENTS USED?

Standardized Patients (SPs) are used extensively as a resource in the Faculty of Health Sciences. Through simulating patient encounters, SPs allow students to practice and improve their clinical and communication skills in a controlled and “safe” environment. SPs are also utilized in evaluative exercises such as Observed Structured Clinical Examinations (OSCEs). SPs can also be used in combination with hi-fidelity mannequins to enhance realism and allow instructors to address advanced communication and resource management issues.

WHO MAY REQUEST AN SP?

SPs may be booked by accredited programs within the University as needed to support educational activity. Any faculty member, tutor, or preceptor affiliated with an accredited program is welcome to request an SP if such resources are supported and approved by their Program Director (or equivalent). Other parties may request SPs; for details, please see the below:

SP REQUESTS FOR COURSES AND CONTINUING EDUCATION

The CSBL and SP Program support requests for SPs to be utilized in educational activities outside of McMaster accredited programs. We require that any educational event (for any group of learners) must be supported through formal Continuing Health Sciences Education (CHSE) review to ensure an acceptable standard for any such activity. CHSE will also oversee applications for continuing education credit by the appropriate body (RCPSC, CCFP, etc.). In cases where continuing education credit is not sought by course planners, we still require that any educational activity be run through CHSE and be determined to meet an accreditation standard. This ensures appropriate academic content, appropriate instructor qualifications, and that appropriate sponsorship rules are followed for all activities supported by the CSBL.

Generally speaking, the Director of the CSBL will be appointed as a co-director of any such courses to ensure timely and appropriate resource support, as well as provide course input where indicated. When the learner audience is mixed (both McMaster and non-McMaster learners), we will generally consider this to be an external educational event. All SP requests for educational events deemed to be non-accredited will be directed to CHSE.

SP REQUESTS FOR EXTERNAL EXAMS

THE CSBL and SP Program provide support for external examinations (non-University, i.e. Medical Council of Canada) involving SPs. For further information, please contact Leigh Norman, lnorman@mcmaster.ca.

NON EDUCATIONAL REQUESTS FOR SPs

External organizations may also request to use SPs from our program for use in non-educational activities. The Administrator of the SP Program and the Director of the Centre will review each request for Simulation Based Learning (CSBL) on a case-by-case basis to determine our involvement. The CSBL and SP Program reserve the right to decline any such requests.

BOOKING PROCEDURE

ONLINE BOOKING FORM

ALL SP booking requests must be submitted electronically, using our online form. For large bookings, please contact simpats@mcmaster.ca and request our Excel Spreadsheet for completion.

Please note WE WILL NOT ACCEPT BOOKINGS BY ANY OTHER METHOD.

The booking form can be found at <http://simulation.mcmaster.ca/resourcebooking2.html>. Please be sure to complete the form accurately and in its entirety. We are unable to begin recruitment for SPs until complete information is provided.

We require a minimum of 5 business days for booking an SP, with day one being the day we receive the request, and not including the date of simulation. **Requests sent with less than 5 days' notice will be declined.** This time frame is necessary for recruitment and training.

For "custom cases" (as described under Case Scenarios), a minimum of 10 days' notice is required.

FIRST AND SECOND CHOICES

Due to times of heavy demand for particular scenarios and demographics, it is necessary that we ask for a First and Second choice of case scenarios.

Please select cases with different age and/or gender requirements. If we are unable to fill your first request, we will automatically move to the second case. The requestor will be informed if the second option has become necessary.

CONFIRMATIONS

The requestor will receive an automatic reply including a copy of the initial booking form when submitted online.

Once request is received, a Trainer will review the needs and respond to the requestor to let you know when the process of recruiting is underway, and to inform the requestor of any potential difficulties with meeting the requirements.

A Trainer will send you an email with the names of the scheduled SPs once all are confirmed. Please be aware, this may not occur until a day or two prior to the event.

REQUESTS FOR SPECIFIC SPS

We will accept requests for specific SPSs, but we are not always able to guarantee their availability. In the instance that the specific SPSs are not available, we will then recruit who we deem suitable.

SP EQUIPMENT & SUPPLIES

We will provide equipment/supplies that are in the scenario, such as a wheelchair, walker or pregnancy apron etc. Since cases cannot be altered, we will not accept requests for equipment/supplies that are not in the case. If the SP is simulating outside of the CSBL, arrangements must be made for the equipment to be picked up from the CSBL, or delivered to the location.

A reminder: All room requests must be submitted through the online booking form, and any questions regarding rooms are to be directed to csbl@mcmaster.ca. The SPP is not responsible for the rooms within the CSBL.

CASE SCENARIOS

Cases must be selected from our catalogue(s). Please email simpats@mcmaster.ca to receive a copy of the catalogue, or stop by the CSBL to review.

We will release a general catalogue of all cases on a yearly basis, in addition to catalogues geared to specific programs (i.e. Occupational Therapy, Nursing etc.)

Our Trainers are able to work with you to select an appropriate case.

Once the catalogue is released for the academic year, we will not accept any requests for custom cases, outside of evaluative reasons as described below.

CUSTOM SCENARIOS FOR OSCEs or EVALUATIVE CONTENT

“Custom” scenarios will only be accepted for evaluative sessions, such as OSCEs. **In these instances, the requesting program is responsible for covering the costs and fees of training.**

It is mandatory that a faculty member from the requesting program perform a dry run with the SPs prior to simulation date.

10 business days’ notice must be provided for booking of SPs for custom cases, and the FULL scenario must be provided to the SPP upon submitting the request. We are not able to begin scheduling SPs until the scenario has been received.

Please use the Scenario Writing Template found here <http://simulation.mcmaster.ca/sppresources.html> to assist in ensuring that all information is provided.

Please contact the Administrator or a Trainer for further information.

SP PORTRAYAL

TRAINING

SPs are trained according to the scenario, and not on a case by case basis.

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

If any changes to the scenario are required, the requestor must speak to the Trainer upon booking.

DRY RUNS

'Dry Runs' are a chance for the SP to practice simulating the case after training and before simulation. Dry Runs allow for a standard portrayal to be set to ensure fairness for program users and students. **It is mandatory that all cases have a dry-run by a faculty member prior to the start of the academic year.** Throughout the year, a Trainer will dry-run any newly trained SPs. All custom cases submitted throughout the year must also undergo a dry run by a faculty member from the requesting program before the simulation date. All dry-runs must be performed with a sufficient amount of time, as allotted by the SPP, based on the faculty member's availability. It is essential that each SP have the opportunity to complete a FULL run-through of the scenario with a faculty member.

SIMULATION

A tutor must always be present when a simulation is underway. If an SP is not comfortable during a simulation, they may stop the simulation. SP(s) are booked to simulate specific scenarios; these scenarios cannot be altered in any way once the SP(s) arrive for their simulation. **It is unacceptable to hand SP(s) additional scenarios or scenario content on the day of the simulation without prior approval from the SP Program. It is also not appropriate to request an SP to do any other case "that they know from before".**

If an SP is asked to portray something other than that for which they were booked, they have the right to decline, and will contact the SP Office for further instructions.

WARM BODY or HEALTHY ADULT PORTAYALS

We offer SPs to be used as "Warm Bodies" for non-invasive procedures, where no history taking is required.

We also offer "Healthy Adult" scenarios in the case catalogue for students to do a full history and examination, where no specific health concern exists.

Please ensure that SPs are requested accordingly.

SPs that are booked as a "Warm Body" or "Healthy Adult" will NOT simulate any other scenario upon arrival.

If an SP is asked to portray something other than that for which they were booked, they have the right to decline, and will contact the SP Office for further instruction.

FEEDBACK BY SP

- 1) All SPs have been trained in a similar process for providing feedback to the learner
- 2) Our format includes:
 - a) At the request of the tutor only
 - b) SP steps out of role and gives feedback from the patient perspective
 - I. Feedback content is related to communication, bedside manner or how the learner made the “patient” feel. (Providing feedback on Health Care content is NOT the role of the SP.)
 - II. SPs include both positive comments as well as constructive feedback
 - III. Amount of feedback may be limited when there are multiple learners, due to time constraints.

For more detailed information see our SP manual “A Guide to Effective Feedback”

If variances are required on how the SP is to provide feedback, please contact the SPP in advance of the simulation.

SP LATE ARRIVALS/ABSENCES

In an attempt to minimize the occurrences of tardy or absent SPs, the SPP has implemented a remediation/termination policy.

Please advise the SPP if your SP(s) arrive late for their session.

ABSENT SPS

In the event that an SP does not arrive for their session and we were not provided with enough notice to find a replacement, we will inform the requestor immediately. Please provide a contact number upon booking.

QUALITY ASSURANCE

Quality Assurance (QA) Forms will be sent to the tutor/preceptor/faculty member prior to simulation:

QA Forms are an important tool for us to monitor the SPs. Please complete and return them if you have any feedback regarding the SPs preparedness, their portrayal, or the scenario.

- The SP is NOT to complete the form themselves – only the portion regarding their name and case information should be filled out by the SP.
- Quality Assurance Forms are used to provide ongoing assessment of:
 - The preparedness of the SP
 - The punctuality of the SP
 - The quality of the training provided to the SP
 - The quality of the case itself
- Quality Assurance Forms will be reviewed by the SP trainers and Program Manager, and issues identified will be addressed as necessary.

Further comments may be sent to the Trainer or Administrator.

Staff members of the SPP may on occasion request to view session through two-way mirror to ensure quality of our SPs.

SP FEEDBACK ON TUTORS/PRECEPTORS/FACULTY

A “Quality Assurance” feedback form will be available to the SPs after each simulation they take part in. This form will include, among other items, feedback on the tutor/preceptor/faculty member whom they participated with.

Feedback will be compiled monthly and sent to the appropriate programs.

If any “red flags” are noted, we will contact the program immediately.

COSTS & PAYMENTS

SPs will be paid according to the hours indicated on their pay sheet; therefore it is essential that tutors/faculty verify these hours are correct before signing.

If the pay sheet is not signed by the tutor/preceptor, an SP trainer will sign for the amount of hours originally requested on the booking form and the program will still be invoiced.

Hours will be adjusted if an SP is required to stay longer, however, will not be reduced if a session does not run as long as originally booked.

INVOICING

Invoicing will occur, at most, 30 days post completion of booking month, and will be based on SP pay sheets, not hours requested.

There will be a minimum charge of 1.5 hours for each SP training and simulation session.

Parking:

- Currently, parking costs are absorbed by the SPP if on site at McMaster University
- Parking expenses will be billed to requesting program when off campus

Travel:

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

- The SP will be reimbursed for mileage at a rate of \$0.47 per kilometre, current as of May 1, 2012
- Mileage will be based upon "Google Maps", from McMaster (1200 Main St W., Hamilton) to the location of the session and back to McMaster. The SPP cannot accept odometer readings for mileage.
- This cost will be included on the invoice to the requesting program

All rates are subject to change. Users will be notified in the event of a change.

CANCELLATION OF AN SP (BY THE REQUESTOR OR THE PROGRAM)

In the instance that it is necessary to cancel a confirmed SP booking:

- The requestor will provide the Standardized Patient Program with as much notice as possible, by email.
- In the instance that a booking is cancelled with **MORE** than 24 hours' notice, the requestor will **NOT** be billed for the scheduled booking.
- **If a booking is cancelled with LESS than 24 hours' notice, the SP will receive full compensation for the hours they were scheduled for, and therefore, the requestor will be invoiced for that amount.**

SPs NOT BOOKED BY THE SPP

Please note that the SPP will **NOT** process payments for any individual (SP, tutor, etc.) who was not scheduled to work through our department.

RESPONSIBILITIES

CONFIDENTIALITY

When submitting a request, you are agreeing to keep all scenarios, procedures, communications, and other related information of the Standardized Patient Program confidential. You understand that the copyright of all materials belongs exclusively to the Standardized Patient Program, and agree to keep these materials secure. The content of the scenarios will only be discussed with the Standardized Patient Program Staff, the SP, and the individuals who have requested our services.

PROFESSIONAL CONDUCT

The Standardized Patient Program (SPP) expects the following from our members and users:

- To exhibit professional and ethical behaviour at all times.
- To exhibit honesty and integrity.
- Be forthright, truthful and trustworthy.
- Demonstrate responsibility and reliability.
- Be punctual.
- Demonstrate accountability, including appropriate assumption of responsibility and reporting of inappropriate behaviours.
- Work well with and show respect to all individuals.
- Respect the authority and knowledge of other professionals.
- Admission of errors and accept responsibility for one's actions.
- Good hygiene and proper grooming along with adherence to McMaster's scent-free policy.
- Sensitivity and respect for other beliefs, opinions, gender, race, culture, religion, sexual preference and status.
- Adherence to rules regarding confidential information as indicated in the *Confidentiality Agreement*.
- Verbal/physical threats, derogatory remarks or any other form of abuse or harassment will not be tolerated as this is a violation of the University's policies and codes of conduct.
- All employees and users must adhere to the *McMaster Anti-Discrimination Policy* and the *McMaster University Workplace Violence Policy*.

RECORDING OF SESSIONS

If you intend to record a session, you must inform the SPP upon placing your request.

- In this instance, the SP will be notified upon booking offer. As with any offer, the SP is free to decline the booking.
- You agree that videos of scenarios will be used solely for educational purposes.
- The SP will be required to sign a consent form with the SPP prior to recording for external productions or promotions.
- The Standardized Patient Program is part of McMaster University Educational Services and is not affiliated nor follows any rules/guidelines associated with ACTRA.

Regarding observation:

All SPs are aware that they may be observed by trainers, faculty or students through one-way viewing mirrors. It is not necessary to provide the SP with notice of intent to observe, however the students participating must be asked, and do have the right to decline.

SCENT FREE POLICY

In accordance with the Hamilton Health Sciences and McMaster University Policies on fragrance restricted environments, we request that students, tutors, faculty and our SPs adhere to the policy and restrict use of fragrances (scents, perfumes/colognes, or any other scented product).

CONFLICT OF INTEREST AGREEMENT

SPs are required to inform us of any conflict of interest they may have, and if they are a student with a McMaster Program.

The SPP will not schedule SPs who are students of the University to perform for their own program unless consent is obtained from the faculty of the program.

If the request is made for evaluative purposes (i.e OSCE), NO student of the requesting program will be used as an SP.