Simulated Patient Program
Policies and Procedures Manual

Learning Resource Centre
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Simulated Patient Program
Learning Resource Centre
Dalhousie University

Introduction to the Learning Resource Centre

The Learning Resource Centre provides expertise on medical/health education for Simulation-Based Learning and competence assessment for future and practicing physicians and health professionals.

Simulated Patients (SPs) have become increasingly important in recent years since patients found in hospitals today tend to be sicker than those in the past. Furthermore, in-hospital patients do not necessarily represent the types of cases that are appropriate for a medical student's level of learning. Overall, there are fewer in-hospital patients, which makes it more difficult for medical students to find opportunities to practice their skills. SPs offer the opportunity to fill these gaps.

The Simulated Patient Program (SPP) provides students, residents, and physicians opportunities to explore the process of patient-doctor communication, learn clinical and physical exam skills, and gain valuable experiences with SPs in a safe environment.

An SP is a person who is trained to simulate the historical, physical and emotional features of a real patient's clinical problem, in a reproducible and valid manner. SPs help students and physicians gain competency in taking medical histories, performing physical examinations, and making diagnoses.

Some SPs are trained to become Clinical Teaching Associates (CTAs). CTAs are able to instruct physical examinations on themselves, including abdominal examinations and musculoskeletal examinations.

Simulated learning will never replace the interaction with real patients in the training of doctors. However, it does provide the opportunity for more practice, observation, and feedback that may otherwise not be available. Some simulations are video recorded, which is advantageous for further discussions and simulations that can broaden the range of clinical situations in which procedural, clinical, and communication skills can be learned.

If you are interested in becoming a Simulated Patient, please complete an application form and send it in to us. You can locate an application at http://lrc.medicine.dal.ca/the_SP_program.htm
Contact Us

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Advantages of Using Simulated Patients

Common Topic Areas for Teaching with Simulated Patients:

History examination skills, physical examination skills, management and counseling skills, communication skills, professionalism and medical ethics, challenging patient interactions, including:

- Psychiatric cases
- Breaking bad news and bereavement
- Palliative care, end of life decisions
- Family violence and abuse (adult and pediatric)
- Anger
- Sexually assaulted patient

Simulated Patients Can Be Used For:

- Role-playing during lectures, presentations and videoconference sessions.
- Enacting carefully scripted and intricate case scenarios while maintaining standardization.
- Improvising and responding to learners needs "on the spot", including Agenda-Led Outcome-Based Analysis (ALOBA).
- Evaluating learners through OSCEs.
- Providing opportunities for safe practice of communication and physical exam skills.
- Providing feedback from the patient's perspective.
- Simulated patients are able to instruct physical examinations on themselves after being trained as a Clinical Teaching Associate (CTA). Some of these examinations include: abdominal, lymph node, musculoskeletal, respiratory, cardiovascular, pelvic, and genital/rectal.
<table>
<thead>
<tr>
<th>SPs are:</th>
<th>What does this mean?</th>
<th>What does this require from each SP?</th>
</tr>
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<tbody>
<tr>
<td>Valid</td>
<td>SPs are comparable to a real patient in a real life situation.</td>
<td>To portray the role realistically.</td>
</tr>
<tr>
<td>Available</td>
<td>SPs are available at any time and any place. It is not necessary to rely on real patient cases that are available only at a given time.</td>
<td>To be as flexible and accommodating as possible when called for a job.</td>
</tr>
<tr>
<td>Reliable</td>
<td>Symptoms, signs, and psycho-social aspects remain stable. The same simulation is always available and repeatable.</td>
<td>To portray the role consistently with each repetition, and remain standardized with others SPs playing the same role.</td>
</tr>
<tr>
<td>Controllable</td>
<td>Situation, setting, level of difficulty, and amount of information given to the student can be controlled.</td>
<td>To be flexible in adapting the role to meet specific needs of the trainee – as directed by the Simulated Patient Educator.</td>
</tr>
<tr>
<td>Adaptable</td>
<td>In some simulations, the examination and/or interview can be interrupted (using a “time out”) and students can discuss with the tutor or amongst themselves any problems of findings. A resource can be consulted and examination continued. Discussion of the problem can be openly discussed in front of the SP (during “time out”). Students and tutors can do ongoing evaluations of their performance.</td>
<td>To maintain the realism and intensity of a role even when interrupted with “time outs”. SPs will be directed to either remain in role, “freeze”, and avoid interaction with the trainees and tutor or they may be directed to offer their feedback which could prove useful to the trainees and tutor (if solicited).</td>
</tr>
<tr>
<td>Able to give feedback</td>
<td>SPs are able to give immediate and constructive feedback to the students regarding their communication skills.</td>
<td>To give specific, constructive feedback to students about their communication skills when required.</td>
</tr>
<tr>
<td></td>
<td>If SPs have been trained as CTAs, they are able to instruct and provide feedback for physical examinations.</td>
<td>SPs will be trained in giving feedback before being asked to do such a simulation.</td>
</tr>
<tr>
<td>Risk free</td>
<td>Students need not to be concerned that they will impose any inconvenience, discomfort or harm on real patients.</td>
<td>Remember that the SPs purpose is to focus on the student’s needs, and that the SPs own agenda must not be evident.</td>
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Responsibilities and Expectations of Simulated Patients

The Learning Resource Centre (LRC) is committed to the highest standard of learning in order to develop highly competent, caring, and socially responsible physicians and health professionals. In order to make the Simulated Patient Program possible, our Simulated Patients must adhere to the responsibilities and expectations listed below by the LRC, as well as the Policies and Procedures provided by Dalhousie University’s Faculty of Medicine (http://www.medicine.dal.ca/for-faculty-staff/professionalism-committee/policies-procedures.html).

**Simulated Patient Responsibilities:**
- Attend required training sessions and simulations
- If unable to attend required training sessions and simulations, please contact the educator/trainer as soon as possible in order to find a suitable replacement
- Arrive promptly for all training sessions, simulations, and meetings
- Portray the role in the manner you were trained
- In feedback situations, provide feedback in a constructive, formative, learner-focused manner
- Report any personal or professional conflicts of interest as soon as possible

**Simulated Patient Expectations:**
- Adhere to the Confidentiality Agreement
- Exhibit professional and ethical behavior at all times
- Respect colleagues, simulated patient educators, students, patients, health professional and all those involved in the SPP
- Demonstrate personal and professional integrity and honesty
- Demonstrate accountability and admission of errors
- Demonstrate sensitivity and respect to others beliefs, opinions, gender, race, culture, religion, sexual preference, and status

**Simulated Patient Professional Conduct:**
- Honesty and integrity
- Altruism
- Respect
- Responsibility and accountability
- Compassion and empathy
- Dedication and self-improvement
What can I expect as a Simulated Patient?

The LRC is committed to creating an environment that is fair, equal, and safe for all of its employees, students, and health professionals. SPs working for Dalhousie University’s LRC, will be treated with the highest level of respect and consideration by all of the members of the LRC, students, and health professionals alike.

Hours of Work:
SP work hours are irregular since they are dependent on multiple factors. The LRC works on many programs (small and large) throughout the year that often have requirements that must be met by a certain demographic or ability. The LRC cannot guarantee a fixed minimum or maximum number of hours of work.

Comfort with a Role:
Please be assured that you can decline, without explanation, any role you are not comfortable with (for example, portraying a cancer patient when one of your family members have recently been struggling with cancer). This will not preclude recruitment for future roles.

Physical Examinations:
Commonly, the physical examinations SPs may encounter are simple, non-invasive examinations that the general public receives from their family physician. For example, learners may listen to your heartbeat, take your blood pressure, and examine your eyes, ears, mouth, and abdomen. More invasive examinations, such as breast of pelvic examinations, are something our learners practice. SPs that are uncomfortable with these examinations are not expected to take part in these programs.

Payment:
Training and simulations are paid at different rates depending on the program, required ability, and feedback necessities.

Method of Payment:
Unless informed otherwise, all SP pay will be directly deposited into your bank account (Dalhousie University requires payment through direct deposit only). All direct deposits are subject to standard government deductions.

An “Application for Direct Deposit of Pay” must be filled out before any payments can be processed. SP pay will be deposited into SP accounts within a two to four week period depending on the day of SP participation. Please direct any questions/concerns regarding your pay to the LRC’s Administrative Assistant at 902-494-3474.

Dress Code:
SPs should dress in a professional manner during training sessions and simulations. Clothing that reveals too much cleavage, back, stomach or undergarments is not acceptable. Please refrain from
wearing clothing with inappropriate logos or rips/tears. Some simulations will request a specific dress code that SPs must abide by.

**Parking Fees and Travel Expenses:**
It is the SPs responsibility to cover the cost of parking fees and travel expenses for a training session or simulation. SPs will not be reimbursed for any parking fees, tickets or travel expenses by the LRC.

**Cancellations:**
In the event of a cancelled program/event/examination, LRC staff will give as much notice as possible. SPs and support staff will not be compensated if Dalhousie University is closed and an event is cancelled due to inclement weather. Please refer to the Dalhousie University website (www.dal.ca) for university closures during inclement weather.

As an SP, once you have committed yourself to a specific event, we expect you will honor that commitment barring extreme circumstances. The LRC asks that you report any difficulties making an SP commitment to your SPE as soon as possible. SPs should provide SPEs with at least 24 hours’ notice; last minute cancellations or ‘no shows’ for a simulation (without a valid reason) will impact future involvement with the LRC.

**Electronics and Personal Belongings:**
Electronics such as cell phones must be turned off prior to the start of a training or simulation. It is more advantageous to never bring any cell phones or electronics into any training or simulation sessions. If electronics are brought into simulations there is a risk that the learner may be disrupted and lose the opportunity to gain valuable educational practice and feedback. Some programs will explicitly ask that no cell phones or electronics be brought to the examination site. SPs must abide by these requests or run the risk of being terminated.

Personal belongings should be kept in a common area that is locked up and safe. If belongings are allowed into the simulation room they must be kept hidden, out of the way, and should not be used until there is a break. No food or drinks should be brought into the simulation; water is an exception.

If SPs have been directed not to bring electronics/personal belongings to a specific simulation, but bring them anyway, they must sign them over to a staff member upon registration. If the item is broken in the process, the LRC does not provide any insurance for electronics/personal belongings and will not accept responsibility for the loss of or damage to electronics/personal belongings.

**Video Recording and Observation**
On some occasions, simulations may be video recorded or observed for educational, research or quality assurance purposes. SPs will be notified upon scheduling if they will be video recorded or observed throughout the simulation. However, SPs may be subject to random video recording and observing and are to be aware that they may be video recorded or observed during any simulation.
No personal information will be shared or referenced during a video recording or observation; the SP will only be identified by the case name and information that was provided during training.

Personal Information and Photographs
In order to provide appropriate SPs for specific simulations, it is necessary for the LRC to receive and maintain specific personal information about SPs. Information such as contact information, health issues, and physical findings will be kept in the SP database in the LRC.

Photographs (head shots) are requested of every SP in order to be kept on file with SP information.

SP information and photographs will not be divulged or shared with anyone other than a SPE or LRC administrator. Individuals that request SPs for a particular program will not receive any personal information on file.

Conflict of Interest
The LRC and licensing bodies are concerned about maintaining the integrity of licensing exams in which many of our SPs take part. Concerns regarding exam integrity exist at the real level (e.g. making sure case content is not passed on) and at the perceived level, that is, maintaining the confidence of Objective Structured Clinical Examination (OSCE) candidates and the public that the exams are administered fairly.

Future Exam Candidates:
Please let the LRC know immediately if you or a person close to you (family, partner, spouse, best friend, etc.) is intending to be a candidate for any upcoming health care OSCEs (medicine, nursing, pharmacy, physiotherapy, etc.). This way we can work together to avoid any conflict of interest issues.

OSCE Preparation Course that uses SPs:
Please be aware that some of the above mentioned licensing bodies stipulate time frames within which SPs involved in these exams cannot take part in any courses that prepare candidates for the OSCEs. Let us know if you have been involved in a preparatory course and together we can avoid potential conflicts of interest.

Smoke-Free/Scent-Free
To protect people from involuntary exposure to tobacco smoke, in 2003, Dalhousie declared the University entirely smoke-free. The No Smoking Policy prohibits smoking in all University buildings, including University residences, on University property and in University vehicles.
Under this policy, those wishing to smoke are asked to leave University property (http://safety.dal.ca/programs_services/smokefree/property.php). While smoking on public property, smokers are asked to avoid littering, to be respectful of others, and of course to abide by the municipal by-law.

The University has also acted to support its many students and employees who report that they are harmed when they are exposed to scents which are present in many scented personal care products. Scents in perfume, cologne, hair-spray, after-shave, and even some soap and fabric softeners, cause serious illness in people who are sensitive to these chemicals.

To provide an environment which supports teaching and learning, Dalhousie asks students, staff, faculty and visitors, to refrain from using such scented products while at the University. The scent reduction program is part of a broader effort to limit, to the fullest extent practical, exposure to all chemicals in our buildings.

Termination of Contract

The LRC reserves the right to terminate an SP if they do not meet the responsibilities and expectations of their position. SP misconduct will be tracked on their file.

The LRC expects SPs to act in a professional and respectful manner (i.e. dress appropriately, arrive promptly, etc.) during training sessions and simulations. SPs that are late, do not show up, do not know their role for a simulation, or are disrespectful to students, staff, and others may be terminated.

I have read and understood all of the above information regarding the Policies and Procedures of working as a Simulated Patient with the Learning Resource Centre.

Name:____________________________________________________________________________

Signature:__________________________________________________________________________
Simulated Patient Agreement
(This copy can be kept for your personal files)

I do hereby consent to act as a simulated patient in role(s) for which I am specifically trained. I understand that the objective of my involvement is to support the learning and evaluation of medical students and other health professionals. In this capacity, I understand that I may be interviewed and examined by students or health professionals in the same manner that would occur if I were an actual patient. (Examinations will never include invasive procedures or treatments, or pelvic/rectal examination unless I have consented specifically to these procedures.) I agree to being digitally recorded in this capacity for medical educational and/or research purposes only. I understand that I will always be informed prior to being recorded.

I hereby consent to inform the LRC immediately if I am, or a person close to me is, planning to participate as a candidate in any licensure examination (e.g. PEBC, MCC, CAPP) or planning to participate as an SP in an OSCE (Objective Structured Clinical Examination) preparatory course.

Confidentiality

1. I understand that all case material and information related to the event I am participating in is to always remain CONFIDENTIAL. This also includes student and candidate performances.

2. I agree to discuss the content of Simulated Patient roles/scripts with Learning Resource Centre staff and OSCE examiners only.

3. I agree to keep secure any copies of the cases given to me and to return them to the Learning Resource Centre at the completion of an event and delete any copies from my computer.

4. I acknowledge all training and case material is the property of the Simulated Patient Program. I will not duplicate or distribute any materials given to me outside the Learning Resource Centre.

I have read this document and had all my questions thoroughly answered by LRC staff.

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Learning Resource Centre DVD Recording & Photographing Consent Form

This form, when signed, gives permission for DVD recording or photographing any training or teaching session and simulated patient encounter with the express understanding that such pictures may be used only for medical records, medical or public education, reproduction in publications and on the Dalhousie Learning Resource Centre website.

Date: __________________________________________________________

Print Name: _____________________________________________________

Signed: _________________________________________________________

Witness: _________________________________________________________

If simulated patient is a minor, a legal Guardian must sign this form:

Signed: _________________________________________________________