UNIVERSITY OF ILLINOIS
COLLEGE OF MEDICINE
AT URBANA-CHAMPAIGN
THE FUTURE OF MEDICINE BEGINS HERE

Standardized Patient
Policies and Procedures Manual
UIUC College of Medicine
Welcome!

Welcome to the Standardized Patient Program at the University of Illinois College of Medicine at Urbana-Champaign. We are delighted to have you join our team of dedicated and experienced standardized patients who are committed to teaching and assessing the clinical and professional skills of our medical students. Your role is crucial to our program’s goals to prepare our future health professionals with the clinical and communication skills necessary to provide excellent medical care. Your commitment to our center is important to our program and our students. This work in which you’ve chosen to participate endorses the mission of our Clinical Simulation Center.

The Mission of the UIUC College of Medicine Clinical Simulation Center is to provide students with a safe learning experience that advances clinical skills, communication skills, patient safety, and clinical outcomes, by integrating medical simulation based teaching practices into the educational curriculum for all students.

Our Goals

- To make the student’s simulated experience educational and enlightening through immersion in case scenarios that are designed to help the students develop problem solving and decision making skills.
- To improve patient safety by assessing student performance of history taking skills, physical exam skills, and communication skills using evidence-based evaluation methods.
- To provide authentic experiences to prepare and assess learners using simulations with a variety of platforms and technologies.
- To sustain and continually improve a program of academic excellence using best practices for simulation based learning and assessment.
- To foster simulation research to improve health care education, processes and outcomes.
- To maintain an outstanding standardized patient program through recruiting, training and ensuring the highest standards in the use of standardized patients.
- To ensure high quality faculty and student satisfaction through transparency, communication, efficiency, and feedback.
Student encounters in our center provide educational sessions using Standardized Patients (SPs) and physician trained examiners. **As a participant in the program, we require that you take some time to familiarize yourself with the policies and procedures of our center.

*Standardized patient, also referred to as an SP.

**Physician trained examiners: teaching assistants, Genitourinary Teaching Associates (trained for gender specific physical examinations), Clinical Instructors or Clinical Assistants/Associates.

Disclaimer

The examinations that you may partake in are instructional and are not to be considered a formal and complete medical evaluation. The supervising physician and/or the learner does not replace your primary care physician.

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Communication

The preferred communication method for communication with standardized patients is via email. If you have special needs, please indicate so on your application or by notifying the clinical coordinator.

Confidentiality

Confidentiality is of greatest importance to this program.

Confidential Materials: The work you will be doing in the Clinical Simulation Centers is designed to help students learn. Our cases are developed for the use of the UIUC College of Medicine only. We allow you to take them home so that you can review and work on your performance.
Keep secure any case material that you are given, and use it only to review before performances. They are not to be shared with anyone not directly involved with your training. Furthermore, you should not discuss your role, case material or performance. Comments, updates, photos and tweets concerning your role should not be placed on social media such as Facebook, Twitter, etc.

Student/SP Confidentiality: **It is imperative that you protect the confidentiality of students, personnel and cases that you enact.** Do not discuss student performance or appearance with anyone except faculty, the trainer or the simulation team staff.

**The Role of the Standardized Patient (SP)**

Standardized patients, also known as SP’s, are used in several ways in the education of health professionals. The role of an SP is to accurately and consistently portrays the medical background, physical condition and emotional state of the patient. As a Standardized Patient, you may be interviewed and/or examined by medical students or resident physicians. Below are the normal circumstances that you can expect during an encounter.

- Most encounters are non-invasive. Typically breast and pelvic exams will NOT be performed; however, in some instances specific male/female exams may be required.
- Each encounter, depending on the level of the student, may involve history taking, physical examination and delivering assessment plan and counseling as needed.
- Physical examinations may be brief to focus on a complaint or encompass a full and complete exam. The student may examine a patient by
  - Listening to the heart and lungs
  - Reflexes
  - Pressing on the stomach
  - Taking a blood pressure
  - Looking into the eyes, ears, nose and throat

In these sessions, students may be learning communication skills, history taking and/or physical maneuvers. You will be trained to assist them in learning and possibly providing feedback on their skills. These sessions will involve you staying in character as patient and evaluating the learner by completing an assessment checklist.

**Helpful skills for a Standardized Patient would include:**

- Attention to detail
- Professionalism
- Good memory, concentration and staying in character
- Excellent listening skills
- Communication for feedback and accurately portraying the case
Scheduling/Casting of SPs

Standardized patients are chosen in much the same way actors are cast in a play. Many things are considered:
- Age, race, gender and certain physical characteristics may be specified in the case.
- High stakes exams or assessments may require a more experienced SP
- Past experience/training in a particular case
- Previous performance
- Faculty requests

You will be contacted initially to determine your availability for an activity. This is not a confirmation. You must get back to us promptly to let us know you are available and interested in participating in the activity. If the slot has not already been filled, you will be assigned and will receive a confirmation. Your confirmation will include the training time and date along with the activity time and date. If you do consent to an activity, we expect that you will arrive at the scheduled times. You will not be expected to participate in all activities and you have the right to turn down and choose which activities you choose to participate in.

We also reserve the right to not call you for the reasons listed below.
- Missing a training or session without notifying the center in some way
- Repeatedly being late for training or sessions
- Acting inappropriately or unprofessional in any way with a student
- Contacting or in any way socializing with a student
- Breaching our expectations of confidentiality
- Failing to accept the authority of the faculty or staff during training or session
  - Interjecting material into a case that is not part of the script
  - Evaluating students in ways other than standard forms
  - Consistently challenging the trainer or faculty

Training

Most sessions will require attendance in SP training in order to perform in the program. The training session will provide you with the following information:
- The schedule for the day
- Type of activity (history only, history and physical, etc.)
- SP script
- Type of student you will be seeing (1st year, 2nd year, 3rd year clerkship)
- The case materials which include the medical and personal facts about the patient you will be portraying.
- A clear understanding of the assessment checklists and their purpose for the session
- Debriefing, feedback and methods to use (if the session requires you to give feedback)
The training process may include:

- An initial training session to discuss the case and the checklists
- Case material to take home and review and memorize the patient history and symptoms
- A second training session to complete a dry run or round-robin discussion of the case and checklist
- Additional training of physical exam techniques
- Review of SP training videos
- Phone calls from the trainer

**The Script and Checklist**

It is just as important to know the script and understand the checklist as it is to act out the case accurately. The script will provide you with patient information that should not be offered unless the student asks. This is a challenging aspect of being a standardized patient. Students must learn the appropriate questions in order to get the information they need. On the other hand, if the student asks a reasonable question, the standardized patient should not be too “stingy” with supplying information.

Students may ask questions for which there is not an answer provided by the script. We can’t anticipate every question a student may ask and likewise we do not want to put a burden on standardized patients by making them memorize pages and pages of details that are not essential to the case. If a question comes up that is not in your script it is better to say “I don’t know” or “I can’t remember” than to ad-lib. If you respond to a non-scripted question, please answer in a neutral way without a lot of detail. Most of these questions are likely to be associated with the social history. Use common sense.

The script and checklist will provide history items, communication and physical exam techniques you should expect the student to perform and what you need to know in order to react to them. Make sure you understand the script and the checklist items during training time and before the day of the session.

If at the end of the training process you do not feel prepared to perform, talk with the trainer. Do not wait until the day of the session to ask questions. Please contact the trainer by email or phone with questions prior to the session.

**Performance Standards**

The following list is not exhaustive, but it outlines the key expectations of a standardized patient:

- Attend all trainings and program sessions to which you have been assigned
- If you are unable to attend training or a session, contact the SP Coordinator as soon as possible
• Always arrive at the designated time
• Prepare thoroughly to portray your role and symptoms as directed
• Arrive dressed as instructed for the case
• Remain in role throughout the session and refrain from social interaction or case discussion during the process
• Provide honest and objective feedback when asked on evaluation forms
• Comments, updates, photos, tweets concerning your role should not be placed on social media such as Facebook, Twitter, etc.
• Do not discuss student performance or appearance with anyone but faculty, the trainer or the Clinical Simulation Center staff.
• Do not discuss your roles here or share case material with anyone outside of the UIUC College of Medicine. Keep all case material secure and use it only to review before sessions.
• Work professionally with the Clinical Simulation Center staff and students, adapting to change with flexibility and maintaining a positive attitude.

Respect the authority of the faculty, Clinical Simulation Center staff and the educators during the training session. Do not:
• Interject material into a case
• Evaluate students in ways other than specified and taught
• Consistently challenge the trainer or faculty and the material they present to you.

As medical professionals and educators you can expect that we will:
• Treat you with respect and consideration
• Contact you if we have work available for which you are suited
• Understand if you refuse a role that is uncomfortable for you
• Recognize that true emergencies do occur and not penalize you when they happen
• Give you feedback and instructions on how you can improve

SP Performance Review

The performance of active standardized patients is reviewed regularly and on an as-needed basis which may include an annual performance review with the SP trainer. This review is an opportunity to give feedback to the program staff as well. SP knowledge and expertise will be assessed using the following criteria:
• Written and verbal feedback is accurate and consistent in quality
• Attendance, including arriving on time
• Portrayal of the case as trained including expression and details of the case
• Ability to be flexible and adapt to changes
• Maintains a professional and positive attitude in working with faculty, staff, students and peers
Giving Feedback

Cases may require written and/or verbal feedback. Please answer questions on assessment checklists as accurately and honestly as possible. It is acceptable to write “do not recall” if you cannot remember a specific question. When giving feedback, be specific by providing examples. Limit comments to the patient’s perspective; do not comment on medical aspects of the encounter. Use descriptive words about how you felt by explaining what was effective or not effective in the interview. Verbal feedback should ONLY be given when requested by an examiner or faculty member.

Session Mechanics

Arrive at the designated time for the session. We have built this into your activity and we expect you to be on time. If you consistently arrive late, even if it is still before the first student encounter, this will be grounds for dismissal from the program. Your standardized patient coordinator can be reached by phone any time if you are running late and need to give notice. Please call the Clinical Simulation Center phone which is 217-300-3296. Check in with the SP instructor upon arrival. They will direct you to your station and ensure that all necessary supplies, props and forms are available.

Unless instructed otherwise, the standard dress code for women includes a sports bra and loose fitting shorts. For men the attire should be underwear and loose fitting shorts. Please change into your gown in one of the changing rooms outside of the Clinical Simulation Center. Cameras and recording equipment are located in exam rooms, so privacy is not available there. Personal belonging may be kept in the main conference room of the center. Please note that the Clinical Simulation Center is not liable for any belongings left in this area so you should not bring valuables with you. Please remember to wear the robe provided and slippers/shoes when you are outside of the exam room.

Conceal evaluation forms and/or case materials before the student comes in the room. Have labs or exam details in an inconspicuous place, but easily accessible when asked for them. The SP trainer will advise you further on handling of such materials.

In order to provide each student with an optimal learning and testing environment that is non-distracting, please follow these guidelines:

- Remain in the exam room as much as possible while students are present in the center.
- Move to the main conference room when students are required to do their note writing.
- If you need to visit the restroom or take a short break, stay in the examiner/standardized patient designated hallways. You should also stay “in character” outside of the Clinical Simulation Center. This means that you should not be interacting with any students you see outside of the Clinical Simulation Center.
• Breaks and/or time for lunch may be built into a session. If food is not provided, we request that you bring lunch or snack and that you do not leave the building during this time. You should use the main conference room during your lunch break and be sure you are back to your exam room in time for the next encounter.

In some cases, a debriefing of the event may be requested. Please plan to stay a short time after the event for this debriefing. If you have any comments of a sensitive nature, please schedule a time to share this information with the coordinator confidentially.

If you do not have a student scheduled for the last encounter of the day, do not assume that you may leave early. Check in with the trainer or coordinator running the program before you leave the building.

**In the Exam Room – Student Encounter**

The focus of the encounter is the student and how that student relates to the patient as described in the case. Jewelry, make-up and perfume/cologne should be minimal, unless they are called for as props in a case. Any personal mannerisms and accessories can be a distraction to the student and therefore it is important to stay in character during the encounter.

Almost every standardized patient is a little nervous. As you do more simulations and work with some nervous students, you will find yourself becoming more and more at ease. The better prepared you are for the session; the less nervous you will feel.

Long pauses may occur during encounters with students. These pauses may make you feel uncomfortable. However, you should wait patiently for the student to continue. Do not volunteer information, prompt the student or make small talk.

We are trying to make the encounter as real as possible for the student. The exam room should be tidy. Keep your personal belongings in the conference room area.

Remember: you are supposed to be unfamiliar with your surroundings, so don’t anticipate moves (prompt the student to pull out the footrest or offer your arm before he/she asks to take your blood pressure).

You may encounter the same student in more than one scenario, however, expressing familiarity with the student is not acceptable as you are portraying a different patient in each scenario.
In the Exam Room – Etiquette

Important Reminder: Video cameras and microphones are capturing footage during the entire encounter day. During the simulation, do not say or do anything that you do not want recorded. Please see the recording policy below.

Cell phones are allowed but please make sure your phone is in silent mode. No videos, pictures, etc. are allowed within the Clinical Simulation Center. Please make any necessary phone calls during the break.

Do not share comments or telltale facial expressions after the student leaves the room. The video of the encounter may be given to the student or faculty member and could be grounds for your dismissal if your behavior is unprofessional.

Exam tables are to be covered with exam table paper. These are changed when patients change, not when students change.

The exam room is not your home but a temporary “stage” upon which you perform. Respect it and leave it as you found it. All trash including bottles of water, newspapers, etc. should be placed in the trash before leaving the exam room. Please place gowns and robes in the laundry basket under the sink at the end of day.

Being an Alternate

Every session requires an alternate. You may be asked to be an alternate. If every SP is present, you may be released for the day. Being an alternate means that you can step in the room and perform if necessary and therefore as an alternate you must know the case and be prepared.

Recording Policy

As previously stated: Video cameras and microphones are capturing footage at all times. During the simulation, do not say or do anything that you do not want recorded.

Each room in the Clinical Simulation Center has the capability to digitally record audio visual media through the use of cameras and microphones. All users of the Clinical Simulation Center will be required to sign an Audiovisual Recording and Confidentiality agreement. Your signature on this document serves as your agreement to be videotaped and to keep information confidential. All cameras have live feed capabilities where users with administrative rights have access to watch real-time encounter. Recordings in the Clinical Simulation Center are only for educational purposes and debriefing opportunities with the appropriate faculty, staff and students. The confidentiality agreement signed by standardized patients, faculty and students protects privacy and discourages inappropriate discussion of
video contents or student’s performance in the simulation scenarios. Users in the Clinical Simulation Center should conduct themselves professionally as in the clinical setting since all interactions can be recorded. All recorded media will be stored on College of Medicine servers and kept for 5 years.

Students may be given access (permitted by their instructor) to a recording that they are individually involved with. Any viewing by students or faculty or publication outside of the classroom, such as posting on YouTube, is unacceptable and unethical. It is important that Standardized Patients understand that they should not share any comments or telltale facial expressions after the student leaves the room. The video of the encounter may be given to the student or faculty member and could be grounds for your dismissal if your behavior is unprofessional.

Recordings shall be stored in electronic format and archived on College of Medicine servers for 5 years.

Faculty may request copies of recordings for research or instructional purposes.

**Parking**

Always arrive with change for a meter or the ability to pay with your phone for parking while attending a session. Never park in a spot or parking lot that is clearly reserved. Any parking fines or towing fines incurred by parking in other spots are the responsibility of the participant and will not be reimbursed by the simulation center.

**Time Sheets and Payroll**

Standardized Patients are responsible for completing their time sheets after each training session or encounter. These time sheets must be reviewed and approved by the trainer. SPs are not allowed to work overtime so close attention to the number of hours worked must be closely monitored.

Standardized patients should expect payment approximately 3 to 4 weeks after the service is provided. Every attempt will be made to have paychecks available as soon as possible based on the University pay periods.
This Policies and Procedures manual, originally created in May 2016, will be updated on an annual basis. In the interim, any changes and additions will be made as an addendum to this original document.

As a Department within the UIUC College of Medicine, the UIUC College of Medicine Clinical Simulation Center and therefore the standardized patients primarily follow the policies and procedures of the institution. This document and the Clinical Simulation Center Policies and Procedures document are supplemental.

This Policies and Procedures manual was adapted from other U.S. medical schools’ manuals for Standardized Patients.
I hereby certify that I have read, understand and agree to abide by the Policy and Procedures outlined in this Standardized Patient Manual.

Signature of Standardized Patient: ________________________________

Printed Name of Standardized Patient: _____________________________

Date: ____________________________________________________________________

Please sign electronically at
http://go.illinois.edu/cscsppandpack