



Policy Name: Standardized Patient and Patient Model Procedure		
Owner:	Administrative Assistant, Simulation Centre	Effective Date: 08/15/2017
Lead:	Director, Simulation Centre	Review Date: 07/01/2021
Approved By:	Simulation Centre Steering Committee	Approval Date: 10/10/2017
Related Policies and Procedures:	Simulation Centre Booking Procedure	

**1.0 PURPOSE**

To ensure that all staff are following the same procedure when utilizing standardized patients and patient models.

**2.0 SCOPE**

This standard operating procedure will provide guidance on standardized patients and patient models.

**3.0 DEFINITIONS**

TERM	DEFINITION
Confederate	A non-patient individual that is part of a simulation to enhance realism or to provide additional challenges or information for the participants.
Lead Facilitator	The facilitator involved in all steps of a specific simulation activity (including planning, implementation, and delivery). This facilitator coordinates, prepares, and mentors the other facilitators for that activity.
Patient Model (PM)	An individual utilized in simulation that does not have a significant acting role, interaction with students, or require training for their role. Instead, the PM acts more as a substitute for a manikin in simulations where a manikin would be insufficient.
Standardized Patient (SP)	An individual trained to portray a real patient with medical problems, allowing students to practice clinical skills on him- or herself to further their education.

**4.0 PROCEDURE***Pre-Simulation Event*

STEP	ACTION	RESPONSIBLE
1	Email completed scenario template and the completed Simulated Patient and Confederate Request Form to the Simulation Centre email address ( <a href="mailto:sim@nait.ca">sim@nait.ca</a> ).	Lead Facilitator
NOTE	Ensure request is submitted six weeks prior to the event.	

STEP	ACTION	RESPONSIBLE
NOTE	<b>If significant orientation, preparation, or a dry run of the role is anticipated at NAIT campus on the day of the event, include this additional time on the request.</b>	
2	Review and approve request via return email.	Simulation Centre Staff
3a	<u>For PM bookings:</u> Confirm with PM availability and book services. (See Simulation Day Event for next steps.)	Simulation Centre Staff
3b	<u>For Confederate and Standardized Patient Bookings:</u> Relevant information from Simulated Patient and Confederate Request Form will be transposed onto U of A SP Booking Form.	Simulation Centre Staff
4	Email the Standardized Patient Program at the University of Alberta ( <a href="mailto:sppgm@ualberta.ca">sppgm@ualberta.ca</a> ) with the following: <ul style="list-style-type: none"> <li>• The completed SP Booking Form</li> <li>• Simulation scenario(s) cases</li> <li>• A request for a quote (cost)</li> </ul>	Simulation Centre Staff
5	SP Program responds within 3 days with confirmation of booking request and quote.	SP Program at U of A
6	Simulation Centre confirms funding availability in the School of Health and Life Sciences simulation budget for standardized patients and/or confederates.  This will be based on the quote provided by the Standardized Patient Program at the University of Alberta.	Simulation Centre Staff
7	If quote is approved, email SP program to confirm booking.  If quote is denied due to lack of remaining funds in SP budget, email SP program to cancel the booking.  Complete this step within 2 working days from receiving the quote.	Simulation Centre Staff
8	The SP Program at the U of A will confirm booking.	SP Program at U of A
9	Provide confirmation of SP and/or confederate names and Quality Assurance Forms 5 days prior to the event to Simulation Centre email.	SP Program at U of A
10	SP and/or confederate training for the event(s) provided at the U of A (as needed).	SP Program at U of A
NOTE	<b>NAIT Lead Facilitator may attend the SP and/or confederates training session at the U of A with the actors if required due to complexity or high stakes exam.</b>	
11	If any last minute changes to scenarios or for cancellation, notice must be given to the Simulation Centre GREATER than 2 working days prior to the event.  Cancellations less than or equal to 2 days will result in NO refund. Changes to be made greater than 2 days prior to the event may be subject to a minimum charge for \$30 change fee.	Lead Facilitator

STEP	ACTION	RESPONSIBLE
12	Contact SP Training at 780.248.1204 or <a href="mailto:petra.duncan@ualberta.ca">petra.duncan@ualberta.ca</a> in case of cancellations.	Simulation Centre Staff

*Simulation Day/SP Event*

STEP	ACTION	RESPONSIBLE
1	SPs, PMs, and/or confederates will arrive on site at the time requested on the booking forms. Any additional time required for orientation, preparation, and a pilot/dry run of the scenarios must be included as part of the booking.	SP, PM, Confederate, and Lead Facilitator
<b>NOTE</b>	<b>Parking/transportation is at the PMs expense. Parking/transportation is provided by the SP program for SP's and confederates and is not NAIT's responsibility.</b>	
2	Ensures that the PM/SP/confederate simulation stations are set up with props and any other necessary equipment.	Lead Facilitator or Program 's Education Technologist

*Post – Simulation/SP Event*

STEP	ACTION	RESPONSIBLE
1	Completion and submission of the Quality Report on the SPs, PMs, and/or confederates to the Simulation Centre.	Lead Facilitator/ Facilitators
2a	Simulation Centre staff will send SP and/or confederate Quality Reports to SP program at the University of Alberta.	Simulation Centre Staff
<b>NOTE:</b>	<b>Simulation Centre staff may make comments additional to Facilitator comments.</b>	
2b	Simulation Centre staff will review PM Quality Report with PM (if required).	Simulation Centre Staff
3	University of Alberta SP Program to send invoice to NAIT School of Health and Life Sciences Simulation Centre at <a href="mailto:sim@nait.ca">sim@nait.ca</a> .	SP Program at U of A
4	Invoice verified, entered in to tracking sheet and copies electronically saved, and then submitted to the Director, Simulation Centre for approval signature.	Simulation Centre Staff
5	Invoice approved.	Director, Simulation Centre
6	Invoice submitted to Accounts Payable for payment.	Simulation Centre Staff

**5.0 SUPPORTING DOCUMENTS**

- U of A SP Booking Form
- NAIT Simulated Patient and Confederate Request Form
- Simulation Scenario Template
- U of A Confirmation and Quality Report
- NAIT Simulation Centre Quality Report

**6.0 DOCUMENT HISTORY**

DATE	ACTION/ CHANGE
October 18, 2016	Initial Draft
June 29, 2017	Steering Committee approval.
July 13, 2017	Changes made to format (to match consistency), Supporting Documents added, Definitions added, and adjustments made to Procedure: <ul style="list-style-type: none"><li>• Pre-Simulation: Step 1 to include more specific instructions about Patient Models</li><li>• Post-Simulation: Steps 1 – 8 to remove portions of the U of A process that are no longer required.</li></ul>
August 15, 2017	Added confederate definition and made adjustments to Procedure: <ul style="list-style-type: none"><li>• Pre-Simulation: Step 1 forms that Lead Facilitator fills out changed from U of A's SP Booking Form or NAIT's PM Booking Form to NAIT's Simulated Patient and Confederate Request Form.</li><li>• Pre-Simulation: Step 3b – 10 to include confederate term with standardized patient.</li><li>• Pre-Simulation: Step 3b to include that Simulation Centre staff will receive NAIT's Simulated Patient and Confederate Request Form and transpose required information to the U of A SP Booking Form.</li></ul>
June 13, 2019	Reviewed. No changes required.