



TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Standardized
Patient Program

STANDARDIZED PATIENT USER GUIDE

MODULE 2

SPs in Medical Education

Selection and Recruitment

SP Training

OSCE and Summative Assessments

VERSION – JUNE 2021

Table of Contents

Module 2 – SP SELECTION AND RECRUITMENT	3
How SPs are incorporated in Medical Education	3
How SPs are selected for an assignment or project.....	3
SP recruitment for projects	3
Recruitment Email	4
SP Training	4
Dry Run or Rehearsal of Role.....	5
Project or Assessments.....	6
Formative and Summative Assessments	6
Alternate SPs (Alts)	6
What is an OSCE Assessment?	7
What is a Rotation?	7
Types of Roles Standardized Patients Are Booked.....	7
Support Staff	8
Sample Teaching Session Recruitment Email Template.....	9
Sample Assessment/ Exam Recruitment Email Template.....	10

Module 2 – SP SELECTION AND RECRUITMENT

How SPs are incorporated in Medical Education

In Medical Education, SPs are incorporated by:

- Assisting in the teaching of clinical, communication and interpersonal skills
- Providing a supportive space for students to practice:
 - Physical exam skills
 - Psychosocial interviews (e.g. breaking bad news)
 - Diagnosis, treatment and management
 - Introducing professionalism
- Assisting with the evaluation of communication and clinical skills
- Providing immediate feedback from the patient perspective

How SPs are selected for an assignment or project

The SPP endeavors to distribute work equitably among our SPs – to those who have longstanding experience with proven reliability and expertise, and to those who are newer and require the opportunity to build their experience and skill. The SPP also has an obligation to our clients to provide SPs that match exam/project blueprints.

Below are a few criteria related to SP selection for a project:

- Client specifications or exam blueprint requirements, such as age, gender, ethnicity, physical characteristics (e.g. no chest scars, no heart murmur), sensitive case content (e.g. comfortable simulating end of life scenarios), etc.
- Ability to integrate learner-centered feedback, if required
- Case requirements (e.g. affect to be portrayed, case difficulty, life experience)
- Past training and experience of SP with requested case
- SP availability (this could include timely/first response, availability based on requirements, etc.)

SP recruitment for projects

- All SPP recruitment is done by email
- Recruitment for MD Program formative and summative exams begins approximately 4-6 weeks before training commences
- If there are time constraints, a case may be recruited on a 'first response basis' (this means that a large number of SPs receive the recruitment email, and those that sign up first will be hired for the project)
- When you receive any recruitment email, reply with your availability either way – even if spots are full, we will keep you on a waitlist in case another SP drops out of the project. The expectation is for SPs to respond to emails and communications in a timely manner
- Recruitment emails are confidential and cannot be shared, not even with other SPs
- Once confirmed for a project, you are responsible for making a note in your calendar. Remember to include the project name, trainer's name, training dates and times, and date, time and location of

simulation. A reminder email is often sent by the recruiter or trainer, but this is not guaranteed and it is the responsibility of the SP to note what/when they have agreed to.

- **Note** – All Recruitment emails from SP Recruiters or Project Managers will be sent on a University of Toronto email address (@utoronto.ca)

Recruitment Email

Recruitment emails contain the following information (see [Sample Recruitment Email Template – Appendix 1](#)):

- Project name
- Dates for project, training, dry run (if dry run required)
- Location/address of project
- The name of the person you are to check-in with, if required
- Pay rate for training, dry run and simulation
- Whether the case is a history, physical, or a combination of both
- Whether feedback will be required
- Possible screening questions (e.g. no abdominal scars for this role)
- Content related to sensitive topics may be included
- If applicable, attire to be worn for the role (e.g. hospital gown over shorts and sports bra) – your trainer will clarify expectations for attire either before or at the first training

SP Training

- Training typically occurs one to two weeks prior to simulation
- Training can be in-person at the SPP office or online using videoconference technology (e.g. Zoom). SPs are generally booked for two hours.
- An SP trainer leads the training session, with anywhere from one to fifteen or more SPs learning the role. All COVID-19 protocols will be in place as per U of T guidelines for training.
- SPs are trained with a case that is provided by the client
- Training includes a read-through of the case and standardization of any patient affect (emotional or physical)
- SPs are not to change their role portrayal from the way they were trained, and are expected to stay in role at all times when in the presence of learners/candidates except when giving feedback to the learner
- If there is a need to change any information about the case after the training has taken place, the Project Manager, or trainer assigned to the project, will provide the change(s) to the SPs as soon as possible

In your training, the following will occur:

- Your trainer will review the case with the group of SPs, highlighting important information and answering questions from the group, including:
 - The project details and the nature of the case you are assigned to

- The level of students or candidates that you will encounter (e.g. first year medical students)
- The learning objectives of the assessment or teaching session
- If the role is a physical, the trainer will discuss or demonstrate the details of the physical exam components
- If applicable, the trainer will clarify what you will be wearing for the simulation
- Emotional or physical affects, if required, will be reviewed and standardized (e.g. a sad affect for a case dealing with mental health or walking with a limp for a case dealing with a sore ankle)
- Some trainers will do a "round robin", which is a group interview where SPs take turns answering questions
- The trainer may ask an SP to simulate a one-on-one interview to highlight how the case may run
- For teaching sessions, trainers will review our feedback methodology with all SPs
- For projects that have a dry run (e.g. large assessments), details will be given so that SPs will be able to come exam ready (i.e. off-book/fully memorized)

Materials you will receive at training:

- Case materials
- For summative assessments: a consent/confidentiality form, case materials, exam day information form, and payment form
- You must bring this package with you to each training and to the simulation

Note – Case materials are secure, and are the property of the client and must be handled with care (i.e. do not lose them), and returned immediately after the project has ended.

Dry Run or Rehearsal of Role

In addition to the initial training, certain roles/projects will involve a second training (specified in the booking email) called a dry run.

- Dry runs are added for certain exams (not every project or exam requires them) and are an opportunity to run the role and ensure standardization for all SPs – think of it as a dress rehearsal
- Dry runs happen approximately one week after the training
- A clinician or content expert may be present, along with your trainer, to lead each SP through the role
- Dry runs take place in front of the SP group to allow SPs to standardize with one another
- You are expected to come to the dry run with your role fully memorized
- The dry run is the final session with your trainer before the simulation
- Dry runs are generally booked for two hours

Project or Assessments

- Registration location and start/end times, as well as information on the project, will be specified in your booking email
- Trainers will also review this information at your training
- For summative exams, you may also receive a reminder email, approximately 1-2 days prior
- You will be informed who to report to upon arrival on project day
- Arrive on time (arriving early is even better)
- For most projects, there will be someone from the SPP who will do an orientation for all SPs
- For some projects, SPs will sign in with a Medical Education Coordinator who does not work for the SPP; Medical Education Coordinators are located at each teaching hospital
- Under no circumstance should SPs portray something other than the role for which they were booked (please notify your Project Manager or SP trainer as soon as possible if you are requested to deviate from your role)
- To the best of our ability, SPs will not be given additional content or an additional case on the day of the simulation

Formative and Summative Assessments

The SPP undertakes formative assessments that are ongoing and flexible for learners. In contrast, summative assessments are more formal, structured, and can be measured and compared. Summative assessments evaluate the outcomes, instead of looking at a learner's development at a particular point in time. Summative assessments are quantitative, and are easily compared, to a standardized test. Most OSCE assessments are summative assessments.

Alternate SPs (Alts)

- An Alternate SP (Alt) will sometimes be trained along with the other SPs booked for the role, and will be kept in reserve in case an SP is unable to do the simulation (e.g. sickness, family emergency)
- Sometimes Alts are paid to stay home for a predetermined amount of time (e.g. until registration is complete or the session has started)
- Alts must be prepared to travel to a project if required
- Often the Alt is assigned after all SPs have been trained for the role (i.e. the Alt may not know in advance that they have been assigned as an Alt)
- If the Alts are not needed in role, they may be assigned to other duties on the day of the project if it is an OSCE (e.g. support duties such as being a timer, being a hall monitor, collecting test sheets)
- Sometimes Alts are booked for a shorter time than the other SPs, with the understanding that they should be available to stay longer if needed. In this situation, the Alt is informed in the recruitment email of the assignment hours.
- SPs who are chosen to be Alts are extremely important for any project; they are selected for their ability to play the role well and to be able to get into role at a moment's notice
- SPs who are booked as Alts for online sessions will either join the online session with the rest of the SPs and stay for the duration of the job, or must be available to log in at any time in order to cover for an SP who may have lost internet connection or power

What is an OSCE Assessment?

- An Objective Structured Clinical Exam (OSCE) is a performance-based test that is a key component of most high-stakes assessments for health professionals
- In an OSCE, candidates engage in a variety of clinical encounters with a number of standardized patients who each portray a particular role designed to assess learner competencies
- Learners rotate between a number of stations (rooms), each with a different SP scenario
- Each station in an OSCE will typically have an SP, an examiner (healthcare professional), and a learner
- The learner spends the allotted time (e.g. 10 minutes) examining/interviewing the patient, while the examiner scores the candidate on a test sheet. At the end of each round, learners move to their next station, until all learners have completed all stations (generally five to ten stations).

What is a Rotation?

- In some physically or emotionally demanding roles there may be two or three SPs taking turns in a station, meaning these SPs are on a “rotation”
- A “rotation” is a schedule that enables SPs to have regular breaks during an OSCE
- Your trainer will inform you if your role will have a rotation, or this information may be included in your booking email; if so, you will be given a rotation schedule illustrating when you will be in role and when you will be on break. It is vital that you keep track during the day of when you go back into role and relieve your fellow SP.

Types of Roles Standardized Patients Are Booked

History

- History roles unfold as a conversation between the candidate/learner and the SP in a clinic setting, where the candidate/learner asks the SP questions and the SP answers based on the information provided in their case
- Some roles contain sensitive topics, and SPs may be required to portray a high affect (e.g. simulate behaviors associated with depression, anger, breaking bad news, mental health diagnoses).

Physical

- Physical roles unfold in a clinic setting, with the candidate/learner performing a physical exam on the SP – the physical exams to be performed may link to a history component of the case that the SP will also be trained on (e.g. respiratory exam, back pain, abdominal exam), or it may be a physical exam role that requires no training for the SP.
- No invasive physical exams will be performed on SPs, unless the SP has been specifically booked and agreed to such an exam (e.g. breast exam, urology exam).
- Pay rates for invasive exams are higher, and SPs who are booked for these types of exams have informed the SPP that they are comfortable with this work.
- SPs will be trained on what type of physical assessments may occur during the simulation.
- Attire for physical roles will vary; often SPs are required to wear a hospital gown over shorts (shorts and sports bra for women).

- You will not be asked to do a physical role that will cause physical pain. If you experience pain or discomfort during a simulation, you can tell the learner/candidate to stop, and then report to a coordinator or SPP staff member.

History/Physical

- Some roles are a combination of history and physical.

NOTE: The physical and psychological safety of our SPs is a top priority. With this in mind, SPs can choose to not accept a role that they are not comfortable portraying, and do not have to provide any reason for declining the job. An example of this would be opting out of portraying an Alzheimer's Disease case when one of your family members has recently been diagnosed with this illness. Declining a role will not preclude you from other SP work. If you have already accepted a role but realize at training that you are not comfortable portraying it, it is important to let the trainer and/or recruiter know as soon as possible so a replacement can be found.

Support Staff

An OSCE has many logistical challenges; for this reason, some SPs who are not simulating are given the opportunity to work as Support Staff to ensure that the OSCE runs smoothly. Some examples of Support Staff jobs:

- **Hall Monitor** – helps with setup and teardown of the exam, and on exam day may assist with timing signals, test sheet collection, candidate movement on track and other assigned duties to ensure a smooth exam
- **Timer** – timekeeper for the exam uses a stopwatch or other timing system to signal when the exam starts, when candidates need to move to the next station, and when the exam ends.
- **Clerical staff** – sort and code exam test sheets
- **Catering** – assist the Catering Team with breakfast, breaks and lunch setup and teardown
- **Equipment** – assist the Equipment Team moving all supplies from the SPP to an exam site; moving any tables, chairs and/or exam beds

Sample Teaching Session Recruitment Email Template

Hello <<First Name>> ,

I am contacting you to determine your availability to work as a Standardized Patient for our _____ **Teaching Session** on **Date/Month/Year**.

Please read this email in its entirety before committing to this job.

Information on Role	<< Information on Role>>
Information on Rotation	<< You will be on rotation so you will have breaks throughout the day>>
Information on SP Feedback	<< SP Feedback is/is not required
Information on special attire for role	<<information for role attire>>

You must be available for the training time AND the full teaching session.

Training:	<<Date and Time>>	Online or In-person
Trainer:	<< Trainer Name>>	
Training Location:	<<Room Number>>,<<Floor>> , <<Street Address>>,<<Postal Code>>	

Session Date:	<<Date>>
Session Reporting Time:	<<Time>>
If Session is Online or In-person	Online or in-person
If Session is in-person	Location, Address and transit information to exam site

Additional information:

Travel Compensation + Flat rate	Yes/No + Flat rate
Food Provided, Info on possibility of leaving exam site during breaks	Yes/No
Job Number :	<<Number>>
Rate of Pay:	<<Training pay>> <<Session pay>>
Name of Project Manager:	

- **Any U of T/ External Location COVID-19 safety protocols, contact tracing information:**

Other information:

- Please let us know **either way, if you are available or not** to participate. If you are available for the session date but the training does not work, we may be able to place you in another role.
- If you are no longer available to work as an SP, please inform a.baltakys@utoronto.ca.
- For additional information on SP role and responsibilities, refer to the SPP User Guide 2021

Thanks so much,

SP Recruiter
Standardized Patient Program

Sample Assessment/ Exam Recruitment Email Template

Hello <<First Name>> ,

I am contacting you to determine your availability to work as a Standardized Patient for our _____ (Exam/Project) on Date/Month/Year.

Please read this email in its entirety before committing to this job.

Information on Role	<< Information on Role>>
Information on Rotation	<< You will be on rotation so you will have breaks throughout the day>>
Information on special attire for role	<<information for role attire>>

You must be available for the training time AND the dry run time AND the full exam day.

Training:	<<Date and Time>>	Online or In-person
Dry Run:	<<Date and Time>>	Online or In-person
Trainer:	<< Trainer Name>>	
Training Location:	<<Room Number>>,<<Floor>> , <<Street Address>>,<<Postal Code>>	

Exam Date:	<<Date>>
Exam Reporting Time:	<<Time>>
If Exam is Online or In-person	Online or in-person
If Exam is in-person	Location, Address and transit information to exam site

Additional information:

Travel Compensation + Flat rate	Yes/No + Flat rate
Food Provided, Info on possibility of leaving exam site during breaks	Yes/No
Job Number :	<<Number>>
Rate of Pay:	<<Training and dry run pay>> <<Exam day pay>>
Name of Project Manager:	

- **Any U of T/ External Location COVID-19 safety protocols, contact tracing information:**

Other information:

- Please let us know **either way, if you are available or not** to participate. If you are available for the exam date but the training or dry run does not work, we may be able to place you in another role.
- If you are no longer available to work as an SP, please inform a.baltakys@utoronto.ca.
- For additional information on SP role and responsibilities, refer to the SPP User Guide 2021

Thanks so much,

SP Recruiter
Standardized Patient Program

Sample Assignment Confirmation Email Template

Dear <<First Name>>,

Thank you for confirming your participation in the <<Project>>.

You will receive a reminder closer to the orientation or training or session or exam day.

Thanks,

Name of SP Recruiter

www.spp.utoronto.ca