## Standardized Patient Manual

### Association of Standardized Patient Educators (ASPE)
### Standards of Best Practice (SOBP)

<table>
<thead>
<tr>
<th>Principle</th>
<th>Practice</th>
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<tbody>
<tr>
<td>1.1 Safe work practices</td>
<td>1.1.1 Ensure safe working conditions in the design of the activity (e.g., number of rotations, number of breaks, physical, cognitive, and psychological challenges in the role portrayal).</td>
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<td></td>
<td>1.1.2 Anticipate and recognize potential occupational hazards, including threats to SP safety in the environment (e.g., allergenic substances, exposure to sharps, air quality, and live defibrillators).</td>
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<td></td>
<td>1.1.3 Screen SPs to ensure that they are appropriate for the role (e.g., no conflict of interest, no compromising of their psychological or physical safety).</td>
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<td>1.1.4 Allow SPs to opt out of any given activity if they feel it is not appropriate for them to participate.</td>
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<td>1.1.5 Brief SPs so they are clear about the guidelines and parameters of a simulation activity.</td>
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<td>1.1.6 Provide SPs with strategies to mitigate potential adverse effects of role portrayal and prevent physical injury or fatigue.</td>
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<td>1.1.7 Inform SPs and clients about the criteria and processes for terminating a simulation if they deem it harmful.</td>
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<td>1.1.8 Structure time and create a process for de-roling and/or debriefing.</td>
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<td>1.1.9 Monitor for and respond to SPs who have experienced adverse effects from participation in an activity.</td>
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<td>1.1.10 Provide a process for SPs and clients to report adverse effects from participation in an SP activity (e.g., documentation and action steps to resolve the situation).</td>
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<td>1.1.11 Support SPs who act in accordance with delineated program expectations if a complaint is made about them.</td>
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<td>1.1.12 Manage client expectations of an SP’s possibilities and limitations.</td>
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<td>1.1.13 Work with clients to clearly define the expected scope of SP involvement in work assignments.</td>
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<tr>
<td>1.2 Confidentiality</td>
<td>1.2.1 Understand the specific principles of confidentiality that apply to all aspects of each simulation event.</td>
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<td>1.2.2 Ensure that SPs understand and maintain the principles of confidentiality related to specific simulation events.</td>
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<tr>
<td>1.2.3 Protect the privacy of the personal information of all stakeholders, including that which may be revealed within a simulation activity.</td>
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### 1.3 Respect

| 1.3.1 Respect SPs’ self-identified boundaries (e.g., modesty, limits to physical touch, impact on person). |
| 1.3.2 Provide SPs with adequate information so that they can make informed decisions about participation in work assignments. |
| 1.3.3 Ensure that SPs understand if and how they are being compensated before accepting work (e.g., may include payment for training and work time, travel expenses, food vouchers, gift cards). |

### 2.1 Preparation

| 2.1.1 Ensure that cases align with measurable learning objectives. (See INACSL Standard: Outcomes and Objectives.) |
| 2.1.2 Identify and engage relevant subject matter experts to assist in the creation of materials. |
| 2.1.3 Ensure that cases are based on authentic problems and respect the individuals represented in a case to avoid bias or stereotyping marginalized populations. |
| 2.1.4 Ensure that case development process allows sufficient time to draft, review, and edit case materials prior to implementation. |
| 2.1.5 Ensure that changes arising from dry-runs or other piloting processes are addressed prior to implementation of the case. |

### 2.2 Case components

| Ensure case components include the following when appropriate: |
| 2.2.1 Clear goals and objectives that can be assessed. |
| 2.2.2 Goals and objectives that specify the intended level of learners. |
| 2.2.3 Simulation design that meets the purpose. |
| 2.2.4 Simulation design that is repeatable. |
| 2.2.5 Information for SPs (e.g., situation and backstory, history, affect and demeanor, signs and symptoms to simulate, cues). |
| 2.2.6 Training resources (e.g., props, moulage, videos, task trainer). |
| 2.2.7 Case-specific feedback or debriefing guidelines. |
| 2.2.8 Briefing instructions, time frames, and instructions to learners. |
| 2.2.9 Evaluation instruments and performance measures (e.g., checklists and rating scales, participant and facilitator evaluations). |
| 2.2.10 Training protocols for raters (SP or other). |
| 2.2.11 Data for managing the documents and recruiting SPs (e.g., author information, date of development, patient demographics, body type criteria). |

### 3.1 Preparation for training

<p>| 3.1.1 Review the purpose, objectives and outcomes (see INACSL Standard: Outcomes and Objectives), logistics, and case materials of the activity. |
| 3.1.2 Address one’s own knowledge gaps, if any. |
| 3.1.3 | Create a training plan that is responsive to the context and format of each activity (e.g., group training for standardization, video review, practice with simulation equipment). |
| 3.1.4 | Gather training resources to supplement training. |
| 3.1.5 | Gather administration documents and special instructions. |
| <strong>3.2 Training for role portrayal</strong> | 3.2.1 Review with SPs the key objectives, responsibilities, context (e.g., formative, summative, level of learner, placement in curriculum) and format (e.g., length of encounter, type of encounter) of each activity. |
|  | 3.2.2 Engage SPs in discussion and practice of role portrayal features (e.g., affect, signs and symptoms, behaviors). |
|  | 3.2.3 Provide SPs with strategies to deal with unanticipated learner questions and behaviors. |
|  | 3.2.4 Ensure consistency and accuracy of role portrayal of individual SPs, and among groups of SPs portraying the same role. |
|  | 3.2.5 Ensure SP readiness for the simulation activity through repeated practice and targeted feedback. |
| <strong>3.3 Training for feedback</strong> | 3.3.1 Review with SPs the fundamental principles of feedback as they relate to the planned activity. |
|  | 3.3.2 Inform SPs of the feedback objectives and level of the learners with whom they will be learning. |
|  | 3.3.3 Inform SPs of the feedback logistics and setting (e.g., one-on-one feedback with learner, small group feedback, simulation debrief). |
|  | 3.3.4 Train SPs to use their observations, responses, and knowledge to provide feedback on observable, modifiable behaviors in learners. |
|  | 3.3.5 Ensure SP readiness through repeated practice and targeted feedback. |
| <strong>3.4 Training for completion of assessment instruments</strong> | 3.4.1 Ensure that SPs understand the nature, context, and objectives of the assessment. |
|  | 3.4.2 Ensure that SPs understand the format of the assessment instrument. |
|  | 3.4.3 Ensure that SPs are able to complete assessment instruments in the time allotted. |
|  | 3.4.4 Provide SPs with practice completing assessment instruments with a variety of learner behaviors. |
|  | 3.4.5 Ensure that SPs understand both the principle and receptive experience of any physical exam maneuvers they will be assessing. |
|  | 3.4.6 In formative assessment, ensure consistent and accurate completion of an assessment instrument within individual SPs, and among groups of SPs performing the same task. |
|  | 3.4.7 In high stakes assessment, verify inter-rater reliability, in which a learner would achieve the same score when rated by different SPs. |
|  | 3.4.8 In high stakes assessment, verify intra-rater reliability, in which SPs would assign the same score to an identical performance at different points in time. |</p>
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<tr>
<th>3.5 Reflection on the training process</th>
<th>3.5.1 Reflect on one’s own training practices for future improvement (e.g., evaluation forms, debriefing, video review). (See also Domain 4.6: quality management.)</th>
</tr>
</thead>
</table>
| 4.1 Purpose                           | 4.1.1 Articulate a mission statement for the program.  
4.1.2 Develop program goals.  
4.1.3 Identify measurable objectives for each goal (where appropriate). |
| 4.2 Expertise                         | 4.2.1 Possess depth of knowledge in SP methodology.  
4.2.2 Advocate for the integration of SP methodology into the curriculum where appropriate.  
4.2.3 Identify when SPs should be incorporated into a simulation activity.  
4.2.4 Collaborate with subject matter experts to design SP cases, training, and assessment materials.  
4.2.5 Train SPs according to scenario or project parameters. |
| 4.3 Policies and procedures          | 4.3.1 Develop and document policies to guide program activities.  
4.3.2 Develop and document policies that take into consideration disability access and inclusion.  
4.3.3 Develop and document business processes and procedures, including but not limited to creating financial management, business, and strategic plans.  
4.3.4 Ensure policies and procedures are kept current and accessible.  
4.3.5 Distribute policies and procedures to relevant stakeholders. |
| 4.4 Records management                | 4.4.1 Collaborate with subject matter experts to develop a system for reporting learner performance to stakeholders (e.g., learners, curriculum developers, faculty, and administration).  
4.4.2 Ensure that policies are in place for case sharing and archiving.  
4.4.3 Develop and document methods for securely storing, archiving, and destroying confidential data (e.g., SP records, learner data, video data, consent forms, release forms). |
| 4.5 Team management                   | 4.5.1 Consult with legal, financial, and human resources experts to ensure that status of SPs (e.g. employee, independent contractor, volunteer) and compensation structure (if applicable) comply with institutional requirements.  
4.5.2 Develop processes to identify, screen, interview, select, debrief, and maintain SPs and staff.  
4.5.3 Recruit and maintain a cohort of SPs that reflects the diversity of the people they represent in simulation activities.  
4.5.4 Establish policies and procedures for the psychological, physical, and environmental safety of SPs, learners, staff, and faculty. (See the “Domain 1: safe work practices” section.)  
4.5.5 Advocate for ongoing professional development opportunities for all staff, including SPs. |
<p>| 4.6 Quality management                | 4.6.1 Gather data regularly to assess the alignment of program activities with legislated, institutional, and program policies and procedures. |</p>
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<tr>
<th>4.6.2</th>
<th>Gather feedback regularly from SPs, learners, faculty, and other users regarding the quality of services provided by the program.</th>
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<tr>
<td>4.6.3</td>
<td>Analyze data and other feedback in a timely manner.</td>
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<td>4.6.4</td>
<td>Implement changes for continuous improvement.</td>
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<td>4.6.5</td>
<td>Inform stakeholders of changes made based on their feedback.</td>
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<tr>
<th>5.1 Career development</th>
<th>5.1.1 Develop and promote expertise in knowledge, skills, and attitudes related to SP-based simulation.</th>
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<tbody>
<tr>
<td>5.1.2</td>
<td>Develop and promote expertise in theories, principles, and processes of education and assessment relevant to the context of one’s practice (e.g., medical education, nursing education, legal, and law enforcement training).</td>
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<td>5.1.3</td>
<td>Maintain membership in professional simulation societies (e.g., ASPE, ASPiH, INACSL, SESAM, SSH).</td>
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<td>5.1.4</td>
<td>Engage in educational opportunities (e.g., professional conferences, courses, degree programs, certifications).</td>
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<td>5.1.5</td>
<td>Develop personal management skills (e.g., time management, wellness strategies, career planning).</td>
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<td>5.1.6</td>
<td>Seek out opportunities for career mentoring.</td>
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<th>5.2 Scholarship</th>
<th>5.2.1 Develop an understanding of the range of opportunities for scholarship in SP methodology.</th>
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<tr>
<td>5.2.2</td>
<td>Identify and/or develop new contexts for SP methodology.</td>
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<td>5.2.3</td>
<td>Contribute to the evolution of best practices through innovation, research, and dissemination of emerging methods in various venues e.g., publications, presentations.</td>
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<th>5.3 Leadership</th>
<th>5.3.1 Promote understanding and development of SP methodology locally, nationally, and internationally.</th>
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<tr>
<td>5.3.2</td>
<td>Mentor and support SPs and other SP educators within one’s institution and within the community of practice.</td>
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<tr>
<td>5.3.3</td>
<td>Seek out and advocate for growth of leadership skills (e.g., collaboration, team building, change management).</td>
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