



Standardized Client Guide

Fred Wilson School of Pharmacy at High Point University, High Point, North Carolina

Administrative Offices: 3003 Fred Wilson School of Pharmacy

Phone 336 841 9761 <http://www.highpoint.edu/pharmacy/sc>

Welcome to HPU SOP!

Standardized Client Function

Standardized Clients (SCs) are individuals who are trained to accurately and consistently portray patients, family members or others. This allows pharmacy students to practice patient history-taking skills, communications skills, counseling skills, and other exercises that simulate office or hospital visits. They are sometimes referred to as Simulated Patients or Standardized Patients.

During teaching or assessment activities, SCs may be interviewed, counseled, and/or have vital signs taken by students as part of the learning environment. Additionally, SCs participate after the encounters in student feedback sessions and are trained to provide verbal and/or written feedback from the patient perspective.

Ultimately, SCs are instrumental in providing students with hands-on practice in a ‘safe’ learning environment that is fair, free of actual patient risk, and appropriate to student learning objectives.

General Standardized Client (SC) Information

What is a simulation?

A simulation (also referred to as an encounter) is defined as the creation of or appearance of reality and allows an individual to learn or to be evaluated on complex skills in a controlled situation.

Who can become an SC?

Anyone! No acting experience, previous experience as an SC, or medical knowledge is required.

We look for the following qualities in our SCs:

- Flexible work schedule
- Comfort performing a role: simulating symptoms, emotional states, and personalities
- Strong observation skills and memory
- Comfort giving and receiving constructive feedback
- Strong written and verbal communication skills
- Basic computer skills
- Professional, adaptable, and non-judgmental attitude
- Interest in making a difference in the future of health care.

Where and When do SCs work?

Events take place in the Standardized Client Suite (Room # 3044) in the Fred Wilson School of Pharmacy on the HPU campus during regular weekday business hours.

We schedule simulations to meet our program needs, which vary depending on specific case requirements. SCs are matched with cases using criteria such as age, gender, race, etc. SCs serve as intermittent, independent contractors and hours vary based on program needs.

Student Class	Day of Week	Time of Labs	Time for SCs	Comment
P1	Wednesday Thursday	1 – 4pm	12:30 – 4pm	
P2	Monday Wednesday	9 – 12 noon	8:30 – 12 noon	
P3	Friday	9 to 4pm	8:30 – 4pm	Lunch provided

How are SCs Trained?

Orientation

New SCs are given orientation training where they are further introduced to the program, our staff, this SC Guide, and our assessment and feedback tools.

Case Trainings

Case-specific training is required prior to each event. SCs are given case materials that outline a patient history (present complaint, past medical history, lifestyle, etc.) and are trained to portray that patient in an accurate, repeatable manner. Most training sessions are 2 to 3 hours long and include review of case material, role-play with trainer and fellow SCs, and practice recording data, and giving feedback. SCs are expected to have reviewed the case materials at home before arriving for training, and to be familiar with the case details.

You will be shown how to react and respond to student questions. For example, if a case involved a complaint of pain, you would be told about the pain, how severe it is, and how you are to answer questions the student may ask. Before encountering students, SCs are expected to be able to successfully present or demonstrate their role.

How are SCs scheduled?

We carefully select our SCs for each event based on program needs. Events for the 1st year pharmacy students are held on Wednesday/Thursday afternoons, the 2nd year students have lab on Monday and Friday mornings, and the 3rd year class has an all-day Friday lab. Once you are identified as eligible for an event, you will be asked if you want to participate via email. Slots will typically be filled on a first-come, first-served basis until the event is fully staffed. Once you are selected, you will receive a booking notification and be asked to confirm your participation. Your name will be placed in ‘the red book’ for the event. You will receive reminders prior to the event (via email).

Clinical Skills Case Activities

The majority of our events are Clinical Skills sessions, with SCs roleplaying cases for our students and often offering verbal and written feedback. Most are one-on-one with the pharmacy students. There are two types of activities: teaching/practice cases and final exam cases, often called OSCS (objective structured clinical scenarios).

What are the Expectations on Event Days?

Pre-Event

- Arrive before your call time to give yourself time to sign in and get settled in the training room or actual case room, attend an event logistics overview or ‘huddle’, get familiar with the student event schedule, and ask any question you might have.

- Complete your **arrival checklist**, posted in the training room. This may include tasks like setting up the computer, staging the room to verify that all props are present, making sure the instruments in your assigned rooms are functioning properly (stethoscopes, BP machines, etc.) etc.
- Review your case material. If questions arise, ask for clarification.
- If you are performing a case that requires a lab coat or scrubs, select an appropriate size from the closet in the training room.

Event

- Listen to and follow the announcements. They will tell you when to be in the room, when to start the encounter, when time is almost up, and when to conclude the encounter. If you are not sure where to be, consult the posted schedule or ask the Floor Manager.
- Dr. Courtney Bradley, Clinical Skills Lab Director, may periodically come in the SC Lab to share information on how students are progressing with their work in the Skills lab and to see if we need any assistance with the case.
- If you have a vacant slot, you may return to the training room or stay in the case room and relax until your next encounter. Do not leave the SC area without checking with the Floor Manager or Director, even on a long break.
- Remember that the cameras in exam rooms and hallway are always on and recording. Don't say or do anything in the patient rooms that you would not want students, faculty or staff to hear or see.
- If your room runs out of supplies or equipment is broken, notify the nearest staff member.
- For some events, you may be asked to monitor other SCs assigned to the same case as a form of quality assurance for the program. SCs will fill out a monitoring form (Performance Checklist) for that case recorded in live time. SCs may also fill out a quality assurance form on the performing SC. When in the training room, please remain as quiet as possible so as to not disturb others who are monitoring.
- SP staff will observe SCs during performances for quality assurance. This may be done over a video monitor and constructive feedback (what to do to make the performance better) will be shared. If want clarification or suggestions, please ask staff.
- Keep the focus on the student throughout the event.

Post-Event

- If time permits, please return to the training room or speak with the Floor Manager or Director for debriefing. Be prepared to discuss what went well, what was challenging, and make suggestions for improvements. However, to save time, this information may be shared via a survey. The icon can be found in the upper right corner of your computer. Discussion can also take place when all the learners have finished their cases.
- If a case was emotionally taxing, the Director/staff may lead a wellness/de-roleing exercise.
- Return lab coats and scrubs to the closet training room. Place on a stool so can be washed.
- Check in with staff to verify that no other students need to be seen, and sign out.
- Complete your **departure checklist** and place beside the Payroll notebook.
- Give all confidential case materials to staff or leave in the room—for shredding.

What is Expected of SCs?

Promptness

- Be on time to all events and trainings
- Respond to email, text, and phone communication in a timely manner
- 'No call, no show' will result in immediate removal from our roster/dismissal.

Portrayal

- Portray the case as trained throughout the event
- Remain standardized (consistent and accurate) with other SCs who are portraying the same case and your character is to be the same for each student

Professionalism

- Maintain professional relationships with peers, students, and faculty
- Only interact with students inside of your role as an SC
- Arrive to all scheduled shifts ready and able to fulfill your work obligations
- If you must cancel a training or event shift due to an emergency, notification should be prompt and clear, and allow time for staff to find replacements

Confidentiality

- Maintain confidentiality of student performances
- Maintain confidentiality of case materials
- Maintain confidentiality of SC performances
- Assume that everything is confidential unless otherwise indicated
- If you know a student outside of the lab, let staff know so you can see another student that you do not know personally

Hygiene

- Do not wear strong fragrances (to prevent asthma attacks in others)
- Maintain personal hygiene

Attire

- On event days: attire should fit the case and be neat/clean
- If blood pressure measurements are to be taken, short sleeves are recommended
- If you tend to get 'cold' in air-conditioned spaces, bring a sweater or jacket

Appropriate Behavior

- **Guard against unconscious bias when speaking and scoring the student** (intuition or feelings, finding a characteristic you either like or dislike, rewarding if have similar likes/dislikes/school, hobbies, etc., looking for 'good things' only and not finding 'incorrect things', similar background, etc.)
- **Do not become too familiar with the student**, such as asking personal questions, touching the student, and having a personal inappropriate conversation, etc.

Professionalism

- We expect professional behavior at all times. Protect the privacy of your peers, students, patients and show respect to all others
- Be respectful to others and offer timely feedback about problematic or uncomfortable interactions
- Refrain from interacting with students except as the character you are portraying and when giving feedback. Do not share any personal information so as to maintain professional boundaries. If asked a personal question by the student, be polite and state: 'Today, I'm Mr. _____' (the character's name for the performance) to 'Let's focus on the encounter at hand.' You can also say, 'I've been instructed not to discuss personal information.' Do not personally interact with students since you are in a position to evaluate them.

Diversity and Inclusion

- An essential part of the job is the ability to work well with diverse populations and personalities.

How do I report inappropriate behavior?

Please promptly report any and all inappropriate behavior to the staff or the Director. You can share concerns in person, via email, via phone, or anonymously with DeAnna Milano in Human Relations. 336 841 9217 or dmilano@highpoint.edu.

What can SCs expect from us?

Safe Work Practices

- **Activity Design:** Ensure safe working conditions in the design of the activity (number of rotations, cognitive, and psychological challenges in the role portrayal)
- **Conflict of Interest Screening:** Screen SCs to ensure that they are appropriate for the role
- **Right to Refuse a Role:** Allow SCs to opt out of any given activity if they feel it is not appropriate for them to participate
- **Clear Guidelines:** Provide clear information about the guidelines and parameters of a simulation activity
- **Wellness Strategies:** Provide SCs with strategies to mitigate potential adverse effects of role portrayal and prevent physical injury or fatigue
- **Debriefing:** Structure time and create a process for de-roleing and /or debriefing if needed
- **Responsiveness:** Monitor for and respond to SCs who have experienced adverse effects from participation in an activity
- **Support:** Support SCs who act in accordance with delineated program expectations if a complaint is made about them

Confidentiality

- Maintaining privacy of the personal information of all stakeholders, including that which may be revealed within a simulation activity

Respect

- Respect SCs' self-identified boundaries (i.e., modesty, limits to physical touch, impact on person)
- Provide SCs with adequate information so that they can make informed decisions about participation in work assignments

Training

- **Role Portrayal:** SCs will be trained to give performances that are consistent and accurate
- **Feedback:** SCs will be trained to provide feedback to learners about how their specific actions and behaviors affected the SC's emotional experience of the student, the SC's trust in the student, and the SC's understanding of the information exchanged
- **Assessment:** SCs will be trained to use various assessment tools (e.g., checklists, rubrics, narrative feedback) for use in formative, summative, or high stakes events. SCs will be trained in the nature, context, format, parameters, and objectives of the assessment tools for any given encounter.

Feedback from the Director/staff

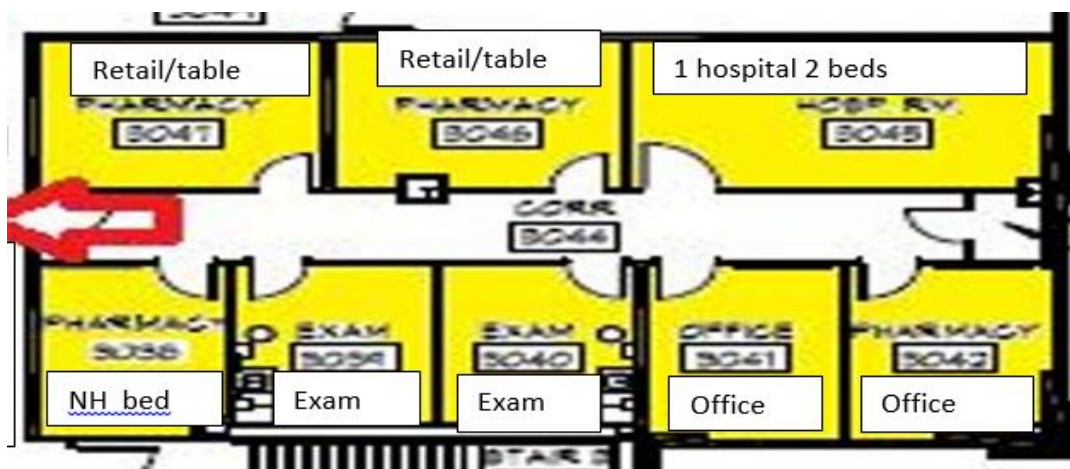
- Feedback from faculty and staff during training on your portrayal
- Feedback from staff assigned to quality control review during events on your portrayal
- Feedback from staff after events on your feedback to learners.

Payment for hours worked

- Flat rate of \$16/hour and covers the time you are asked to be in the SC Lab.
- Checks are cut once a month, after the data is sent to the Accounting Office and will be mailed to the address provided on the payment form (timesheet).
- In the event that an SC's start or end time changes due to changes on our end, we will pay SCs for the original time for which they were confirmed.
- There is a 2-hour minimum pay for training and events.
- If you are asked to stay late, pay will be adjusted and if the event ends early, you will be paid for what was asked/confirmed.
- For some cases, if we ask that you read/learn the case at home before the training, we will pay you at least for 30 minutes.
- If questions about pay arise, please contact Kristen Hoskins at khoskins@highpoint.edu or 336 841 9671.

Where will simulations be performed?

Simulations will be held at the Standardized Client Lab on **3rd floor** of the pharmacy school. The main door is #3044 and there are 8 individual rooms located there (Rooms 3038 to 3047).



Where do SCs park on event days?

Please enter the High Point University campus at the Montlieu-Centennial intersection security gate. The road that you turn onto is now labeled International Avenue. Tell security you are a "Standardized Client guest of the School of Pharmacy and have been entered into iVisitor."

After you proceed through the gate on International Avenue, you will see the NEW Fred Wilson School of Pharmacy and Congdon School of Health Sciences building --the first large building on the right after you pass through the security gate.

Turn right (second right) into the parking lot for the first large building, and drive around to the back side of the building, where there are several "Visitor" and handicap parking spots available. * There are 2 doors to enter:

1. There is a large central entrance off the back 'visitor' parking spaces. Enter under the porch, walk to the center of the open space, turn left, and take the elevator to the 3rd floor. Take a left and walk past the breakfront, then take a left down the hallway. The Standardized Client rooms will be on your left --Rooms 3051 and 3044.
2. In front of the handicap parking spaces, there is a door leading to the Skills Lab. If enter through this door, take the stairs up to the second floor and the SC Suite will be on your right at the top of the stairs on 3rd floor.

*If Visitor and Handicap Parking spaces are taken, consider the following:

- Watch for students exiting the building near the student parking lot and follow them to their car. Park in their space or any open space you see.
- Park in the Webb Conference Center or back of the Stout School of Education parking spaces. To get to these spaces, go to the fountain in front of Congdon Hall and circle till can take the left turn. At the next road on the left (beside Stout), turn in and take the next left. This will put you behind Stout and if drive further, will get to Webb Conference Center. The spaces in front of Webb and between Stout will be the closest to the Pharmacy School. Walk through a small garden and cross the road to the Pharmacy School.

Phone: FWSOP Administration: 336 841 9671 or Jean Douglas 336 202 0407.

Desirable Characteristics in an SC

<p><u>Interest</u> Have an interest in portraying a client and can give honest feedback.</p>	<p><u>Able to portray a person with a health problem</u> Portray a client with a real illness and be realistic exactly as trained.</p>	<p><u>Unbiased</u> Evaluate objectively, based on student performance and merits. Can remove any strong biases toward certain population groups or medical professionals.</p>
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<p><u>Can wait for the student to 'think'</u> Don't be afraid of silences. These occur in "real life". If there is a long pause in the interview, and you become uncomfortable with the silence, wait patiently for the learner to continue.</p>	<p><u>Can learn the props</u> Familiarize yourself with props that make your case more believable and realistic, e.g., if 'married', wear a wedding band. Check to be sure that all equipment is in place before the next learner enters the room.</p>	<p><u>Consistent</u> It is important for you to be consistent with the information and responses. It is also important that you score each learner accurately to the same criteria. The SC must always be standardized so that no matter how many individuals are portraying the same case, the information, affect, responses, and scoring will be the same.</p>
<p><u>Conscientiousness</u> Check your email regularly. Learn the information for your simulation, attend all the training sessions, arrive on time, portray the case character, and evaluate your learner accurately and consistently, exactly as trained</p>	<p><u>Accuracy (good recall)</u> Give case facts correctly and consistently to insure a standardized encounter for each learner. Do not offer information unless you are asked. We are teaching students to elicit information and they need to ask for that information.</p>	<p><u>Corrects mistakes</u> If you give the wrong information, state that you gave the wrong information and then correct yourself. If, however, you gave incorrect information that would be a serious contradiction of facts of your case or withheld information that could mislead the learner, wait until the end of the encounter and then tell staff. If you are asked a question that was not covered in your training, give the most benign response you can, such as, 'I don't know'.</p>

*Thank you for your interest in working with **HPU School of Pharmacy students.***

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