

UCSF Educational Skills Workshop

The Effective Use of Standardized Patients in Health Professions Education

Jenny Mandal, MD
Anita Richards, MACM
Trang Trinh, PharmD, MPH
Maria Wamsley, MD

Before we begin, please:

- Rename yourself in Zoom – Name, Preferred Pronouns, School and/or Department
- Share one thing in the chat that you are hoping to get out of this workshop

Zoom Etiquette

- Mute microphones when not speaking
- Ask questions in chat or verbally (use raise hand function)
- Keep cameras on in breakout rooms (when possible)



Workshop Objectives

- Discuss the rationale for the use of standardized patients (SPs) in health professions education.
- Explain the process for developing a patient case including the case objectives, checklist, and considerations of diversity, equity, inclusion, and bias.
- Create an outline for a patient case for formative (teaching) or summative (assessment) purposes.

Workshop Agenda

- Overview of SP use
- Process of writing SP case
- Break (5 min)
- Develop a case outline (breakout)
- Additional case components
- Next steps
- Wrap-up

Workshop Agenda

- Overview of SP use
- Process of writing SP case
- Break (5 min)
- Developing case outline (breakout)
- Additional case components
- Next steps
- Wrap-up

Assessment Purposes

For the learner

- Reinforce learning
- Guide future learning
- Determine readiness for advancement or practice
- Earn a grade or a standing

For the program

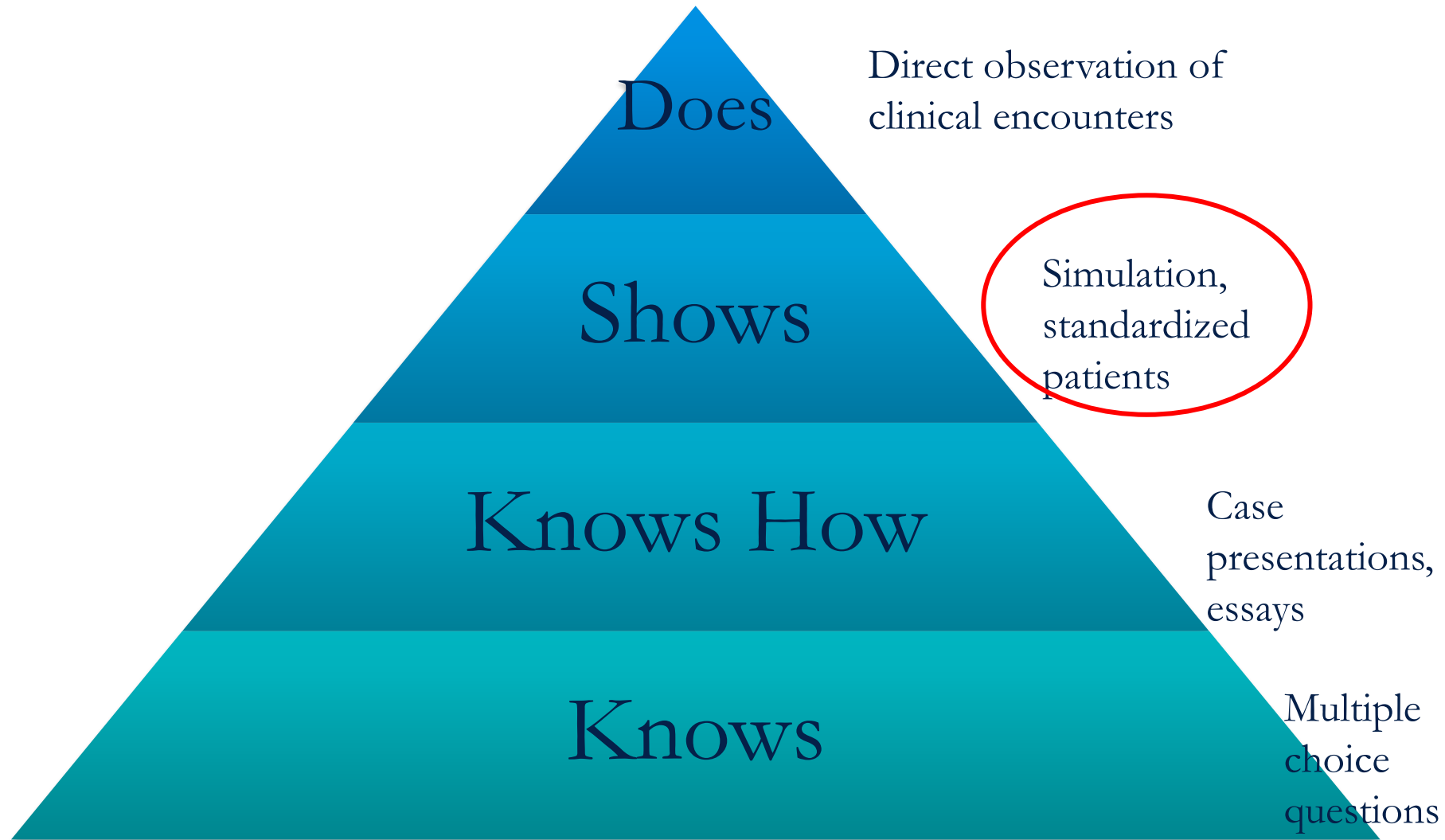
- Ensure high quality patient care
- Inform decisions about advancement and selection
- Improve the program

Assessment *for* Learning

An information-rich approach...to collect and combine information from various sources to inform about the strengths and weaknesses of each individual student, with the purpose to optimize their learning.

Rather than merely giving a student a score or ranking, in the *assessment FOR learning* philosophy, assessment activities contribute significantly to student learning by giving each student ongoing information (data and other feedback) about their performance that is key to guiding their individual growth and progression towards professional competency and mastery.

Miller's Pyramid of Assessment



Objective Structured Clinical Examination (OSCE)

- Series of timed stations
- Each station focused on a different task
- 8-10 stations to achieve reliability
- Checklist of specific behaviors
- Ex: U.S. Medical Licensing Exam, Canadian Pharmacy Licensing Exam



Image credit: Barbara Ries / for UCSF

Using Standardized Patients (SPs) for Teaching Purposes

- Practice communication skills
 - Breaking bad news
 - Handling challenging patient interaction
 - Addressing unprofessional behavior of colleagues
- Practice physical exam maneuvers
- Assess interprofessional interactions



Image credit: PIPE

Hybrid (Patient-Focused) Simulations

- Combines SPs with inanimate models
- Used in procedural or surgical skills teaching
- Adds the patient perspective to the simulation

Ex: SP plays a pregnant patient but a plastic pelvis/mannequin simulates the actual birthing process



Image credit: Anita Richards

Beyond Standardized Patients

- Standardized caregivers
- Standardized colleagues
- Standardized students



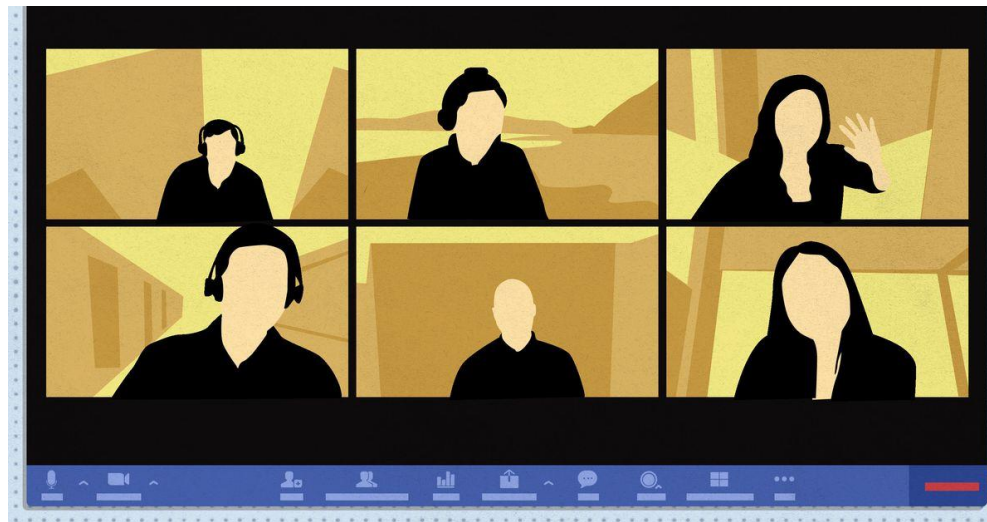
Image credit: Barbara Ries / for UCSF



Image credit: UCSF

Virtual Standardized Patient Exercises

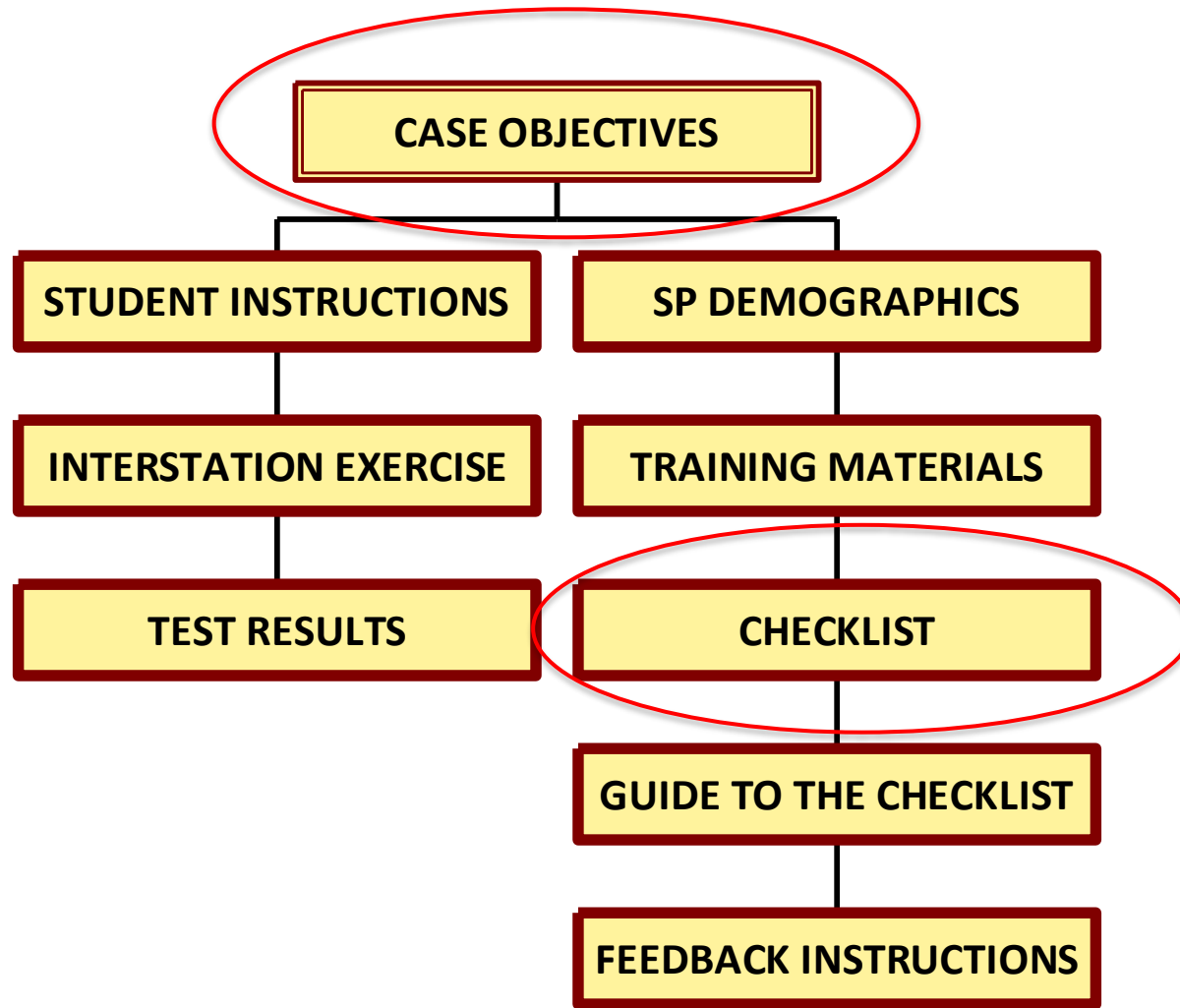
- Learners can engage with SPs via Zoom (or other virtual platforms)
- Potential benefits:
 - May help learners prepare for telehealth encounters
 - Reduces logistical barriers (no need for simulation center, learners, actors, and facilitators can all participate remotely)
 - Safety during COVID19



Workshop Agenda

- Overview of SP use
- **Process of writing SP case**
- Break (5 min)
- Developing case outline (breakout)
- Additional case components
- Next steps
- Wrap-up

What makes a case?



SP Case Considerations

- What are the objectives of the case?
 - What skills would you like to assess?
 - Why are those skills important to assess?

- What is the level of the learner?
 - How will you assess them?

- What additional context would you like to incorporate?
 - Consider diversity, equity, inclusion, and belonging (DEIB) principles

Diversity, Equity, Inclusion, Belonging

- **Does the case reinforce stereotypes?**
 - Include people from various ethnicities, genders, life stages, socioeconomic statuses, etc.
- **Does the case use person-first language and avoids stigmatizing terminology?**
 - Examples: a person who injects drugs vs. IV drug users, a person experiencing homelessness vs. a homeless person
- **Who can accurately portray the patient?**
 - Account for SP identity during recruitment and possible bias towards/from learners



Image credit: Microsoft PowerPoint stock image

SP Case Checklist

- Develop a checklist or rubric that is mapped to the case objectives

- Consider checklist components:
 - Checklist: Yes or No (e.g., content items)
 - Checklist: Global ratings (e.g., communication skills)
 - Number of checklist items

SP Case Checklist

- Who completes the checklist (raters)?
 - Faculty
 - Standardized patient
 - Peer

- Have the raters had unconscious bias training?

- How do learners receive feedback?

Example Case: Kell Carl

- 17 year-old transgender male visiting the Adolescent Transgender Clinic for an initial visit
- Watch the video and complete the checklist
- Group debrief

Break – 5 minutes

Workshop Agenda

- Overview of SP use
- Process of writing SP case
- Break (5 min)
- **Developing case outline (breakout)**
- Additional case components
- Next steps
- Wrap-up

Small Group Breakout

Developing a SP Case Outline

- Assignment into breakout groups of 3-4
- Roles – ***Facilitator, Timekeeper, Scribe***
- Spend no more than **3 minutes** sharing your ideas for an SP case and then choose one idea to develop further in your small group
- Scribe to complete the SP case development worksheet in **Google Doc**
- **15 minutes** on case objectives and what you will assess (Part 1)
- **10 minutes** on brief case outline (Part 2)
- Jenny, Maria, Anita, Trang may join your group

Debrief

- Share one learning objective from your case
- One challenge that your group faced in completing the case outline

Workshop Agenda

- Introductions
- Overview of SP use
- Process of writing SP case
- Developing case outline (breakout)
- **Additional case components**
- Next steps
- Wrap-up

Guide to the Checklist/Scoring Key

Essential for good inter- and intra-rater reliability

Documents scoring criteria

The learner asked if I use substances/drugs/recreational drugs.

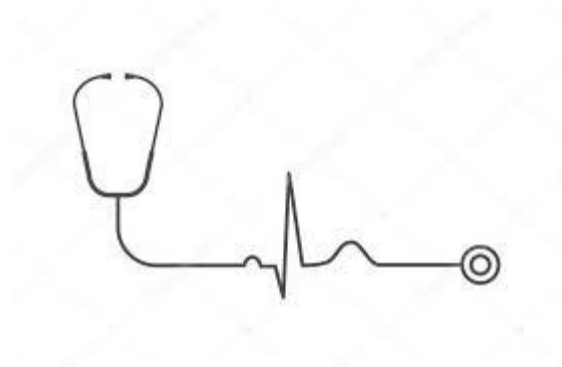
YES: The student asked an open-ended question regarding drug use OR specifically asked if I use cocaine or methamphetamines.

NO: The student didn't ask about drug use OR only asked about marijuana.



Interstation Exercise

Post-encounter activity for learner



Debrief

Learners process and reflect upon a shared experience

Debrief session design depends on **learning objectives** and roles/identities of participants

Common models:

- Plus Delta (Change)
- Advocacy-Inquiry
- PEARLS



Image credit: Barbara Ries / for UCSF

Workshop Agenda

- Introductions
- Overview of SP use
- Process of writing SP case
- Developing case outline (breakout)
- Additional case components
- **Next steps**
- Wrap-up

CQI



Wrap-Up/Evaluations

- Please use the **google doc** worksheet to complete your skills assessment so you get credit for the workshop
- Please complete the workshop evaluation

<http://tinyurl.com/UseofSPs>

References

- Schuwirth LW, Van der Vleuten CP. Programmatic assessment: From assessment of learning to assessment for learning. *Med Teach*. 2011;33(6):478-85. doi: 10.3109/0142159X.2011.565828. PMID: 21609177.
- Miller GE. The assessment of clinical skills/competence/performance. *Acad Med*. 1990 Sep;65(9 Suppl):S63-7. doi: 10.1097/00001888-199009000-00045. PMID: 2400509.
- Reznick, R K; Blackmore, D; Cohen, R; Baumber, J; Rothman, A; Smee, S; Chalmers, A; Poldre, P; Birtwhistle, R; Walsh, P. An objective structured clinical examination for the licentiate of the Medical Council of Canada: from research to reality. *Academic Medicine* 68(10):p S4-6, October 1993.
- Nestel D, Kneebone R. Perspective: authentic patient perspectives in simulations for procedural and surgical skills. *Acad Med*. 2010 May;85(5):889-93. doi: 10.1097/ACM.0b013e3181d749ac. PMID: 20520046.
- Hyde, S., Fessey, C., Boursicot, K. *et al*. OSCE rater cognition – an international multi-centre qualitative study. *BMC Med Educ* **22**, 6 (2022). <https://doi.org/10.1186/s12909-021-03077-w>

References (cont)

- Ringsted C, Østergaard D, Ravn L, Pedersen JA, Berlac PA, van der Vleuten CP. A feasibility study comparing checklists and global rating forms to assess resident performance in clinical skills. *Med Teach*. 2003 Nov;25(6):654-8. doi: 10.1080/01421590310001605642. PMID: 15369915.
- Cunnington JPW, Neville AJ, Norman GR. The risks of thoroughness: reliability and validity of global ratings and checklists in an OSCE. *Adv Health Sci Educ*. 1997;1:227–33.
- Fanning RM, Gaba DM. Role of Debriefing in Simulation-Based Learning. *Simulation in Healthcare: The Journal of the Society for Simulation in Healthcare* 2(2):p 115-125, Summer 2007. | DOI: 10.1097/SIH.0b013e3180315539
- Eppich W, Cheng A. Promoting Excellence and Reflective Learning in Simulation (PEARLS): Development and Rationale for a Blended Approach to Health Care Simulation Debriefing. *Simulation in Healthcare: The Journal of the Society for Simulation in Healthcare* 10(2):p 106-115, April 2015. | DOI: 10.1097/SIH.0000000000000072

Creative Commons License

Attribution-NonCommercial-Share Alike 3.0 Unported



You are free:

- to Share — to copy, distribute and transmit the work
- to Remix — to adapt the work

Under the following conditions:

- **Attribution.** You must give the original authors credit (but not in any way that suggests that they endorse you or your use of the work).
- **Noncommercial.** You may not use this work for commercial purposes.
- **Share Alike.** If you alter, transform, or build upon this work, you may distribute the resulting work only under a license identical to this one.

See <http://creativecommons.org/licenses/by-nc-sa/3.0/> for full license.