

Checklist for Programs Requesting the Usage of Standardized Patients

The following checklist is intended to guide programs utilizing standardized patient actors.

COMPLETE

PRE-SESSION PLANNING

Identify one person who is the main contact for planning and executing the SP session (program lead).

Identify necessary administrative support for the planning and execution of the session.

Secure the PTAEO number or other billing information to pay for the usage of SPs and provide it to the Manager of the SP Program (Dorothy.debernardo@yale.edu)

Propose dates for the training session and workshop and make appropriate room reservations.

Submit the Request for Usage of SPs form online to the SP Program. See link below.

Contact the Manager/Director of the SP Program regarding using existing scripts or make plans to create scripts de novo. *Note: The SP program is happy to provide sample scripts for programs to use as a guide.*

Have the Manager of the SP Program determine SP availability and book the SPs for the training and session.

Finalize the logistics of the workshop (*i.e.* the specifics of how the session will be run). Send the SPs a confirmation e-mail with the details of the session (location/date/time), their scripts, and session expectations well before the training/workshop dates. We recommend this be done as soon as possible after all arrangements are confirmed. While all official booking of SPs occurs through the manager of the SP Program, programs are welcome and expected to communicate directly with actors regarding session details (*e.g.* questions regarding cases, session location, etc.).

Send the SPs a reminder e-mail of their commitment (time, date, location, etc.). The reminder email should go out 1 week in advance.

Secure the proper on-site support (faculty, administrative, *etc.*) to execute the training and workshop(s).

Secure the time sheets from the Manager of the SP program and print them out to bring to the training and session.

EXECUTION OF TRAINING & SESSION

At the training session, describe the expectations for the workshop and allot time for the SPs to rehearse and have their questions answered.

At the SP training session and workshop, have the program lead and actors sign the time sheets.

POST-SESSION ITEMS

The day after the workshop, submit the signed SP time sheets within 3 days of the session to the Manager of the SP Program for processing. Timesheets can be scanned and sent by e-mail or delivered by hard copy. *Note: SPs are casual employees and paid weekly for their work. Please make your best efforts to return their signed time sheets immediately following the training or session.*

****Note:** Actors are expected to attend all sessions for which they are booked unless there is an emergency or illness. In this event, actors are expected to directly contact the program leader with as much advance notice as possible.

In the case of an actor not appearing for a scheduled program or cancellation on behalf of the actor, the program (and actor) should directly notify the manager of the SP Program. Further, in the case of inclement weather, the program

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should contact the manager to determine next steps. The program should supply all SPs participating in their session with a contact cell phone # for emergency contact on the day of the session.

Yale School of Medicine Standardized Patient Program: <http://tlc.yale.edu/standardizedpatientresources/index.aspx>

Request for Usage of Standardized Patients Form: https://yalesurvey.qualtrics.com/jfe/form/SV_6zqbUY9C8J8yD3v