

STEPS

Policy & Procedure Manual



STEPS

DAVID AND JO ANN SHAW CENTER
FOR SIMULATION TRAINING AND
EDUCATION FOR PATIENT SAFETY

Naming Convention and Signing

Purpose:

To ensure consistent naming and numbering of policies and procedures.

Scope:

STEPS Leadership

Anyone writing policies and procedures for STEPS

Responsibilities:

- STEPS Leadership: Provides oversight that all new policies are named and numbered according to policy. Also ensures that updates are numbered as per policy and maintained in a centralized location.
- STEPS Staff writing policies: Those writing policies will name and number according to policy. They will also sign as the author of the policy.
- Medical Director or designee: Reviews new and updated policies to ensure proper naming and number. If not the author of the policy, will sign in place of the Director.
- Director or designee: Reviews new and updated policies to ensure proper naming and numbering. If not the author of the policy, will sign all policies.

- STEPS Staff: When writing new or updating policies, they will ensure that numbering is according to the new policy.

Definitions: None required for this policy.

Procedures:

Naming and numbering of new policies will be done as follows:

- Policies will be included in one of the designated categories.
- The first two initials and numbering order within the category will be used to designate the policy.
- The name of the policy will be according to the category and/or the intent of the policy.
- Updates will be numbered in sequential order based on the extent of change. (i.e. 1.0, 1.2, or 1.0, 2.0, etc.)
- The Director will sign policies unless they are the author of the policy. In that case, the Medical Director will sign the policy.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Daniel Summers

Author

July 18, 2018

Date

X Dorian Williams

Approver

July 18, 2018

Date

Policy: AD01
Adopted: February 5, 2018
Reviewed/Revised: July 18, 2018
Author: Daniel Summers
Approver: Dorian Williams

Chronological Revision History

Version	Modification	Date
1.0	New SOP	February 5, 2018
2.0	New Policy Format	July 18, 2018

Dress Code

Purpose:

To ensure STEPS staff, faculty, and instructors present themselves to our customers in a professional manner. Staff should be aware that appearance is an integral part of our image and contributes to professionalism. Inappropriate dress could be detrimental to our mission and vision.

Scope:

This policy applies to all staff, faculty, and instructors representing STEPS.

Responsibilities:

Enforcement of this policy will be the responsibility of the direct supervisor for staff. Faculty not assigned directly to STEPS and guest instructors will be under the discretion of STEPS Director or Medical Director. It is the responsibility of all to police each other in order to maintain our professional appearance at all times.

Definitions: None required for this policy.

Procedures:

All staff, faculty, and instructors must demonstrate professionalism and a businesslike attitude through their appearance.

- All must be clean and well-groomed. Grooming preferences or dictates by religion, ethnicity, etc. are not restricted but should always be well-presented.

- All clothing should be clean and in good repair. Rips, tears, or holes are not appropriate.
- All clothing must be appropriate for this setting. Clothing worn for workouts, outdoor activities, or recreation are not allowed.
- All clothing must project professionalism. Clothes that are too revealing or inappropriate for this venue will not be allowed.
- Clothing with writing or decals that might be perceived as offensive or inappropriate are not allowed.
- Exception to the above (i.e. jeans day, holiday attire, etc.) will be at the discretion of the director.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Daniel Summers
Author

July 19, 2018
Date

X Dorian Williams
Approver

July 19, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	October 1, 2009
2.0	The SOP template was updated and the dress code process was further defined.	May 2, 2017
3.0	New Policy Format	July 19, 2018

STEPS Oversight and Integration Leadership (SOIL)

Purpose:

The purpose of this policy is to describe the structure and function of the STEPS Oversight and Integration Leadership (SOIL). This group serves to help STEPS achieve its vision (*Promoting patient safety, improving health.*) and support its mission. The SOIL will assume the duties of the previous Advisory Committee that was disbanded in 2016 as well as an expanded scope with bi-directional communication and system integration as outlined below.

Scope:

- Provide insight and advice into emerging trends utilizing technology in healthcare education.
- Review/oversight of STEPS Committees (Executive Committee functions).
- Accreditation oversight both STEPS accreditation and meeting accreditation requirements of those we serve.
- Review, advise, recommend, and initiate, policies, and issues relating to STEPS
- Serve as a channel through which faculty at large may introduce matters for consideration
- Address concerns or complaints unable to be handled by EQI or STEPS Leadership

Responsibilities:

Members include:

STEPS Medical Director, STEPS Director, IPE Director, One appointed representative from each of the Health Sciences Schools, and WVU Hospital

Education Leader. Chair to be chosen from the membership excluding the Medical Director and STEPS Director.

Reports to the Assoc. VP for Academic Affairs through the Medical Director

▪ **STEPS Medical Director**

- Serves as Advisor to the Committee
- Works with the Chair and STEPS Director to develop meeting agendas
- Reviews meeting minutes
- Has overall responsibility for ensuring appropriate use of STEPS facilities and staff

▪ **STEPS Director**

- Serves as Chair of the Committee in the Chairs absence
- Works with the Chair and Medical Director to develop meeting agendas
- Reviews meeting minutes
- Responsible for the day to day operations of STEPS facilities and staff

▪ **Committee Members**

- Assists committee Chair and STEPS director with meeting agendas
- Attends meetings whenever possible
- Reviews and votes on approval of action items
- Collects and reports on matters of Simulation as it relates to their constituents
- Sends a designee to the meeting in their absence if possible

- **Administrator**
- Responsible for scheduling meetings.
- Takes meeting minutes, disseminates them to members and files them for later reference.
- Acts as a point of contact for committee business
- Actively participates in meetings and committee correspondence.

Definitions:

Term or Acronym/Abbreviation	Definition
STEPS	Simulation Training and Education for Patient Safety
SOIL	STEPS Oversight and Integration Leadership

Procedures:

- The STEPS Oversight and Integration Leadership shall typically meet on a quarterly basis and ad hoc meetings as needed.
- Minutes from the prior meeting will be presented for approval then archived.
- Agenda items will be distributed prior to the meeting
- The STEPS Medical Director, STEPS Director or invited STEPS Committee chairs/designees will present a summary of each committee activities since the last SOIL meeting.
- Each Committee Member will provide an update for the School or area they are representing
- Minutes will be generated and distributed for comment.

References:

- None required for this policy.

Policy: AD03
Adopted: January 25, 2018
Reviewed/Revised: July 23, 2018
Author: Dorian Williams
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Dorian Williams

Author

July 23, 2018

Date

X Daniel Summers

Approver

July 23, 2018

Date

Policy: AD03
Adopted: January 25, 2018
Reviewed/Revised: July 23, 2018
Author: Dorian Williams
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	January 25, 2018
2.0	Updated to common STEPS format policy	July 23, 2018

Orientation

Purpose:

To ensure faculty, staff and learners have a role-appropriate introduction to the rooms, equipment, capabilities, and purpose of STEPS.

Scope:

This policy applies to all individuals who utilize STEPS.

Responsibilities:

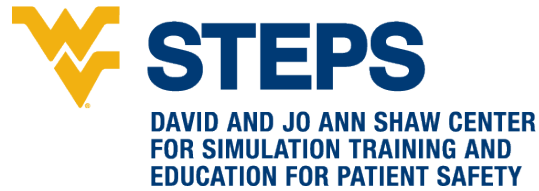
Enforcement of the policy will be the responsibility of the STEPS Director, or his designee.

Definitions:

None required for this policy.

Procedures:

Staff will receive an appropriate and ongoing orientation to the center by way of their initial training, and utilization of the STEPS Orientation Manual. The individual responsible for the specific area of the staff member's training will sign their initials by the appropriate space on the trainee's orientation checklist and/or onboarding form.



Policy: AD04

Adopted: April 28, 2017

Reviewed/Revised: April 23, 2019

Author: Jason Craig

Approver: Daniel Summers

Faculty/Educators will be given an initial tour of the center, and will have a meeting with designated staff members regarding scheduling, usage, and capabilities according to their needs. New faculty inexperienced to the simulation modality will be provided with an orientation course. In addition, specific simulation training sessions will be made available as the need and demand arises, such as lunch & learn sessions, teaching scholar courses, conferences, and other opportunities.

Learners: Faculty/Educators are expected to properly orient their learners to the simulation environment prior to their simulation encounters. This is expressed to them through the various orientation sessions mentioned above.

Appendix A: Generic Onboarding Form:

ONBOARDING STEPS			
Title	Description of Item	Equipment Check-Off	Signature - Date
Equipment Needs			
Desk Top Computer			
2 Monitors			
Wire less Key board/mouse			
Desk Phone			
Laptop			
Software Needs			
Title	Description of Item	Software Check-Off	Signature - Date
Microsoft Office			
LearningSpace			
SharePoint			
Access Needs			
Title	Description of Item	Access Check-Off	Signature - Date
Trainings for Position			
Title	Description of Item	Training Check-Off	Signature - Date
Committee Responsibilities			
Title	Description of Item		
Other			
Links to helpful information			

Appendix B: Employee Orientation Checklist:

New Employee Checklist

Employee: _____

Emp. Init.		Date	Trainer
	Provide with access to Sharepoint Orientation Materials		
	Conduct tour of center		
	Introduction to Human Patient Simulator		
	Introduction to SimMan and SimMan 3G		
	Introduction to METIMan		
	Introduction to Advanced Airway Trainers		
	Introduction to CAE PediaSIM		
	Introduction to BabySIM		
	Introduction to SimNewB		
	Introduction to Gaumard NOELLE		
	Introduction to Gaumard Newborn HAL		
	Introduction to Laerdal ALS Baby		
	Introduction to MPL Megacode Man		
	Introduction to Nursing Anne VitalSim		
	Introduction to Patient Kelly Simulator		
	Introduction to VitalSim		
	Introduction to NBC Module		

Introduction to Kyoto Kagaku EYE and EAR Exam Trainers		
Introduction to Endoscopy Accutouch System		
Introduction to Baby Umbi		
Introduction to Vascular Access Virtual Reality Sim		
Introduction to IV Arms, Central Line Trainers, & Arterial Line Trainers		
Introduction to Chester Chest		
Introduction to TraumaMan		
Introduction to Ultrasound Machines and Trainers		
Introduction to FLS 2000		
Introduction to Male & Female Pelvic and OB Trainers		
Introduction to Family Planning Educator		
Introduction to Breast/Testicle Simulators		
Introduction to Circumcision Trainers		
Introduction to SP Program		
Introduction to GTA Program		
Introduction to LearningSpace		

Policy: AD04
Adopted: April 28, 2017
Reviewed/Revised: April 23, 2019
Author: Jason Craig
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X **Jason Craig**
Author

April 23, 2019
Date

X **Daniel Summers**
Approver

April 23, 2019
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	December 14, 2016
2.0	The SOP template was updated.	April 28, 2017
3.0	Template updated to STEPS Common Format	July 23, 2018
4.0	Procedure Updated	April 4, 2019
4.1	Added Appendices for Onboarding and Orientation	April 23, 2019

ID Badge

Purpose:

ID badges allow for ease in identification and well-defined roles. ID badges provide security to our center and its users, which is only accessible through specifically authorized ID badge swipe-access after business hours.

Scope:

This policy applies to any learner, staff, or educator currently holding an ID badge that clearly defines their role (ie. WVU Hospital ID, Student ID, Employee ID).

Responsibilities:

All educators, staff, and learners are responsible for visibly wearing their ID badge on their person. If this badge is lost or stolen, the badge holder is responsible for reporting it right away and begin the process of replacing it, per WVU Health Sciences Policy.

Definitions: None required for this policy.

Procedures:

- ID Badges must be worn visibly when using the center, in accordance with WVU Policy.
- ID badges can be used around the center for swipe-access after regular business hours. Swipe access can be granted through authorization of the Director.

- If an ID badge is lost or stolen, it must be reported right away.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Kathryn Smalley
Author

July 23, 2018
Date

X Daniel Summers
Approver

July 23, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	October 1, 2009
2.0	The SOP template was updated and the policy was further defined.	January 18, 2017
3.0	New Policy Format	July 23, 2018

Curriculum Committee

Purpose:

The purpose of this policy is to outline the processes for review of simulation activities that have taken place at STEPS and define the roles and responsibilities of the Curriculum Committee.

Scope:

This committee is charged with ensuring that faculty are utilizing the WV STEPS center to provide quality education by:

- Assisting faculty to design educationally sound objectives
- Creating evaluations to appropriately assess simulation activities
- Reviewing the simulation educational skills of those directing the simulation

Additionally, the committee assists with Longitudinal Faculty Development and/or Credentialing of Faculty.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **Curriculum Committee Chair(s)**
 - **Administrative Research Coordinator**
 - **Committee Members**

- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)
 - **Curriculum Committee Chair(s)**
 - Sets meetings agendas with input from the committee.
 - Leads committee meetings
 - Distributes new course requests to committee members.
 - Presents results of review/mentoring to committee for vote.
 - **Administrative Research Coordinator**
 - Assists committee chair with meeting agendas
 - Takes meeting minutes, disseminates them to members and files them for later reference.
 - Acts as a point of contact for committee business.
 - Maintains communications for the committee to include scheduling meetings and distributing project information and letters.

▪ **Committee Members**

- Assists and mentors interested educators when asked
- Reviews documentation of mentoring and responds Yes – allow activity to move forward or No – and provides constructive feedback.
- Actively participates in meetings and committee correspondence.

Definitions: None required for this policy.

Procedures:

- Faculty/Instructor submits request for a new activity to STEPS Center and/or requests help developing the activity. The committee chair will send the activity request to the committee member from the corresponding discipline to review.
- If faculty/instructor requests help developing the activity, a committee member from that discipline will act as a “simulation mentor” and contact the instructor to provide templates/ideas/checklists to help successfully develop, implement and evaluation the simulation activity.
- Committee member(s) will reievew the activity to ensure that objectives/assessment/ simulation equipment are appropriate and complete a review of the activity (the committee member will also likely need to contact the instructor for additional information about the activity, which will help foster mentoring relationships within each discipline). The committee member will submit the completed review on SOLE for other committee members to review (ideally within 7-10 days of being assigned the activity).

- Committee members will be notified that a new review has been submitted and will have 1 week to view the document and either "Approve" or "Recommend Changes." Committee members are also encouraged to leave any recommendations for improvement for the faculty/instructor (and note any opportunities to develop IPE activities). Comments will be compiled by the committee chair and any recommended changes will be sent to the faculty/instructor of the activity

References:

SSIH Accreditation Core Standards and Criteria:

Teaching/Education Standards and Measurement

Accreditation in the area of Education will be available to Programs that demonstrate regular, recurring simulation educational activities with clearly stated objectives (knowledge, psychomotor skills and behaviors) and provides evidence of ongoing improvement of educational activities. The 4 sections of Education Standards are: (1) Education Design, (2) Qualified Educators, (3) Educational Activities, and (4) Evaluation and Improvement.

1. EDUCATIONAL ACTIVITIES

- a. The Simulation Program is committed to providing high-quality simulation educational activities.
 - i. Document or describe how the Program links its educational activities to the Program's mission and goals.
 - ii. Describe and document the qualifications of the individual(s) that oversee simulation educational activities.
 - iii. Provide documentation of simulation educational activities (maximum 3).

iv. Onsite, provide at least 3 videos of simulation educational activity for reviewers to examine.

2. EDUCATIONAL ACTIVITY DESIGN

a. The Simulation Program designs simulation educational activities that are evidence based, engaging, and effective.

- i. Describe how the Program assesses need for simulation educational activities.
- ii. Describe how the Program designs simulation educational activities.
- iii. Provide tools used in the design of simulation educational activities.
- iv. Provide a list of educational activities that follow the design process (maximum of

10). Onsite reviewers will choose three (3) activities to review.

b. The Simulation Program determines how simulation modalities, locales, and/or realism will meet the learning objectives.

- i. Describe how simulation modalities, locales, and/or level of realism are determined when designing simulation educational activities.

c. The Simulation Program has personnel with expertise designing simulation educational activities.

- i. Describe the process to ensure that simulation experts are included in the design of simulation educational activities.
- ii. Submit accreditation biosketches for simulation experts that are involved in the design of simulation educational activities. (maximum of 5)

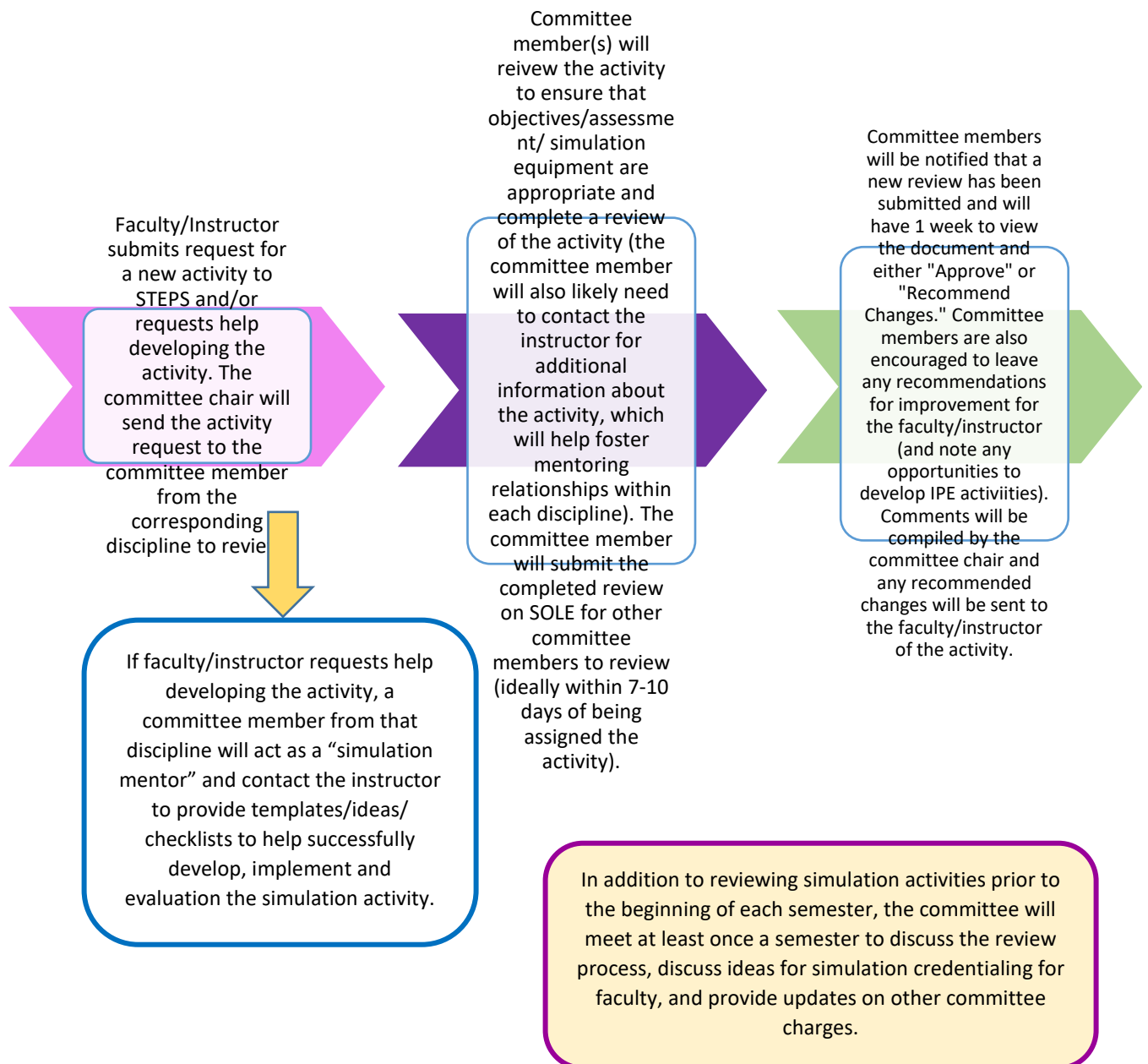
3. QUALIFIED EDUCATORS

a. The Simulation Program has access to qualified educators.

- i. Submit accreditation biosketches for the most active educators (maximum of 5).

- b. The Simulation Program selects educators to match the learner group's level of study.
 - i. Describe the process to match the qualifications of the educator to the characteristics of the educational activity.
- c. The Simulation Program has a process to assure ongoing development and competence of its simulation educators, at least annually.
 - i. Describe the evaluation and feedback processes for simulation educators.
 - ii. Provide a list of simulation educators (maximum of 10). Onsite reviewers will choose three (3) educators to review.
 - iii. Document or describe opportunities for educators to engage in professional development that is specific to simulation.
- d. The Simulation Program has a process to assure orientation and development of those who participate in the delivery of educational activities but are not simulation experts.
 - i. Document or demonstrate the elements included in the orientation process for those that participate in the delivery of educational activities but are not simulation experts.
 - ii. Describe the evaluation and feedback processes for those that participate in the delivery of educational activities but are not simulation experts.

Policy: ED01
 Adopted: December 7, 2017
 Reviewed/Revised: April 23, 2019
 Author: Lee Ann Miller
 Approver: Daniel Summers



Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Lee Ann Miller

Author

July 23, 2018

Date

Daniel Summers

Approver

July 23, 2018

Date

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Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	December 7, 2017
2.0	Updated to common STEPS format policy	7/23/2018
2.1	Added Flowchart	4/23/2019

Evaluation & Quality Improvement Subcommittee

Purpose:

The purpose of this policy is to outline the processes for periodic review of simulations that have taken place at STEPS and define the roles and responsibilities of the Evaluation & Quality Improvement (EQI) committee.

Scope:

STEPS assembled an Evaluation & Quality Improvement committee comprised of qualified individuals of the health professional schools to ensure quality education is taking place by regular review of evaluation submissions and correction of concerns. The focus of the committee is upon student satisfaction, instructor satisfaction of support, student centered instruction, reduction of error, and reflection for future growth and improvement.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **EQI Committee Chair**
 - **Administrative Research Coordinator**
 - **Committee Members**
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)

- **EQI Committee Chair**
 - Sets meetings agendas with input from the committee.
 - Collects and reviews submitted course review material
 - Leads committee meetings
 - Composes letters of thanks and/or remediation

- **Administrative Research Coordinator**
 - Assists committee chair with meeting agendas
 - Takes meeting minutes, disseminates them to members and files them for later reference.
 - Acts as a point of contact for committee business.
 - Maintains communications for the committee to include scheduling meetings and distributing project information and letters.
 - Maintains records of course reviews and data for each submission.

- **Committee Members**
 - Assists and mentors interested educators when asked
 - Reviews and approves submitted project proposals
- Actively participates in meetings and committee correspondence

Definitions:

Term or Acronym/Abbreviation	Definition
EQI	Evaluation & Quality Improvement
ADEE	Assistant Director Education & Evaluation
SOLE, eValue, RubyOnline	Online evaluation tools
LS	Learning Space

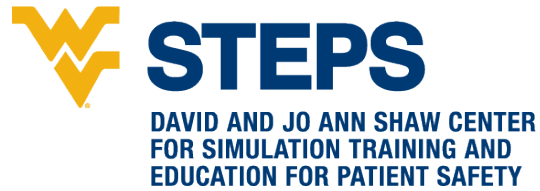
Procedures:

- Periodic review of evaluations by school designee on corresponding evaluation tool. Report of outliers (an average of 3.0 or less) submitted to faculty in charge of the educational session and brought to the next committee meeting
- Regular committee meetings to conduct review and provide suggestion to instructors and STEPS staff as needed.
- Review of designated courses, as indicated in SSIH accreditation core standards and criteria, occurs at regular committee meetings. When necessary, committee will report recommendations to the faculty in charge with expectation of follow up prior to the next course offering.
- End of semester collection of instructor feedback via SOLE survey

References:

SSIH Accreditation Core Standards and Criteria:

4. EVALUATION AND IMPROVEMENT: The Program has a method to evaluate its overall program and services areas, as well as the individual educational, assessment,



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Author: Lee Ann Miller

Approver: Daniel Summers

and/or research activities in a manner that provides feedback for continued improvements

4.b.i. The program has a plan for systematic quality improvement (QI)/ performance improvement (PI) that includes but is not limited to assessment of learner outcomes and achievement and course evaluation by course participants, at least annually.

Appendix A: Instructor Evaluation

Instructor Please rate your overall assessment of using STEPS for your simulation today. Or, if you have worked on several activities using STEPS this semester, provide an overall rating of your STEPS experience.

1. Overall, did STEPS meet your needs?

- 5 Yes, all the time
- 4 Yes, most of the time
- 3 Yes, sometimes
- 2 No, not very often
- 1 No, not at all

2. Overall, did the scheduling process meet your needs?

- 5 Yes, all the time
- 4 Yes, most of the time
- 3 Yes, sometimes
- 2 No, not very often
- 1 No, not at all
- Not Applicable

3. Overall, did the simulation run smoothly?

- 5 Yes, all the time
- 4 Yes, most of the time
- 3 Yes, sometimes
- 2 No, not very often
- 1 No, not at all
- Not Applicable

4. Overall, did the equipment work properly?

- 5 Yes, all the time
- 4 Yes, most of the time
- 3 Yes, sometimes
- 2 No, not very often
- 1 No, not at all
- Not Applicable

5. *Overall, did the Standardized Patient(s) meet your needs?*

- 5 Yes, all the time
- 4 Yes, most of the time
- 3 Yes, sometimes
- 2 No, not very often
- 1 No, not at all
- Not Applicable

6. *Overall, did you receive enough support from the center staff?*

- 5 Yes, all the time
- 4 Yes, most of the time
- 3 Yes, sometimes
- 2 No, not very often
- 1 No, not at all
- Not Applicable

7. *If you responded with a rating of 1, 2, or 3 (No or Yes, sometimes) to any of the above, please provide feedback as to why you made that selection:*

8. *Additional comments are appreciated:*

Appendix B: Center Evaluation

STEPS Center Evaluation (CE)

Poor/Fair/Satisfactory/Good/Excellent	Poor [1]	Fair [2]	Satisfactory [3]	Good [4]	Excellent [5]	
1. How would you rate the WV STEPS Center in providing an environment that promotes learning?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
2. If your answer to previous question is Poor or Fair, please comment: (NS)						
<input type="text"/>						
3. What could be done differently to improve your experience in the simulation center? (NS)						
<input type="text"/>						
Rate Level of Achievement.	Not Provided [0]	Not achieved [1]	Poorly Achieved [2]	Achieved [3]	Well Achieved [4]	Strongly achieved [5]
4. Did this experience achieve the stated learning objectives?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Poor [1]	Fair [2]	Satisfactory [3]	Good [4]	Excellent [5]	Not applicable [0]
5. If your encounter included a standardized patient (live actor), how well did he or she meet your expectations? Comment...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Appendix C: Course Review Template

WV STEPS Simulation Center Evaluation of Simulation Learning Experiences

Course Name and Number:
Primary Course Coordinator:
Dates of Exercise:

1. Please provide a brief description of the simulation activity or exercise.

- 2. Did instruction take place prior to the simulation experience to prepare learners for what they would encounter? If yes, please describe.**

- 3. Were learners provided with the learning objectives of the simulation experience prior to the event?**

- 4. Did the simulation experience meet the stated objectives? If yes, please provide supporting evidence or data.**

- 5. Did the exercise include formative or summative assessment/feedback to learners? If so, please describe or attach a copy to this report.**

- 6. Were learner evaluations of the simulation exercise obtained? If so, please attach a copy to this report.**

- 7. Were evaluations of the instructors obtained? If so, please attach a copy to this report.**

- 8. What changes do you plan to implement in this learning activity (if any) based on the experience of these instructors and learners?**

Appendix D: Course Review Letter
Evaluation Subcommittee Simulation Review Report

Course Name and Number:
Primary Course Coordinator:
Dates of Exercise:

Dear Instructor:

The Evaluation Subcommittee for WV STEPS met on **[date]** to review your simulation experience. The purpose of this committee is to systematically maintain quality improvement / program improvement directives which impacts our services to students as well as our accreditation with the Society of Simulation in Healthcare.

Included in our review materials were the course review template and student evaluations. *We would first like to congratulate you the majority of excellent evaluations from the students.* The purpose of the letter is to provide a summary statement of recommendations to help focus future efforts to improve the course and maximize student learning. Please consider implementing these suggestions the next time your course is offered.

Thank you for your continued support of simulation at WVU Health Sciences. If you have any questions please contact **[The school committee representative]**.

Committee recommendations:

- 1.
- 2.
- 3.

Respectfully,

WV STEPS Evaluation Subcommittee

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Lee Ann Miller

Author

July 23, 2018

Date

Daniel Summers

Approver

July 23, 2018

Date

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Author: Lee Ann Miller
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Version	Modification	Date
1.0	New SOP	December 7, 2017
2.0	Updated to common STEPS format policy	July 23, 2018

Faculty Development Credentialing

Purpose:

In order to maintain accreditation, all individuals who teach at STEPS are required to have a minimum level of knowledge about teaching with simulation. The purpose of this policy is to outline the necessary components of determining the ability of an instructor to teach a course in the simulation center.

Scope:

This procedure is developed for individuals in the schools of Medicine, Nursing, Pharmacy, Dentistry who have instructional affiliation at STEPS.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **Curriculum subcommittee reviews course proposals and mentors faculty prior to implementation of the course.**
 - **Research Assistant tracks participants and dates of participation. RA interacts with Continuing Education to ensure CEUs are awarded to participants.**
 - **Faculty development committee creates and modifies the instruction as needed.**
- **CHSE certified staff present the instruction to audiences upon request or as requested by STEPS to address new instructors or instructors who need support.**

- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)
 - **Medical Director or designee**
 - **Director or designee**
 - **ADEE meets with faculty who request specific support in creating new instructional activities.**
-

Definitions:

Term or Acronym/Abbreviation	Definition
ADEE	Assistant Direction of Education and Evaluation
CHSE	Certified Healthcare Simulation Educator
RA	Research Assistant

Procedures:

Minimum objectives for credentialing:

- Describe the STEPS simulation program
- Differentiate 4 simulation modalities
- Utilize 4 components of simulation education

•Options for presentation:

- One hour sessions in STEPS or at Department regularly scheduled meetings
 - Self paced online materials TBA
 - Or equivalent experience as determined by demonstration of teaching
- Demonstration of teaching at STEPS
- Observation/checklist
 - Student evaluations
 - Staff mentoring
 - Yearly re-evaluation

References:

Appendix A: Curriculum Committee Workflow.

- **A New Course request is submitted via scheduling software.**
- **Committee co-chairs are alerted**
- **Committee member is assigned to contact instructor**
- **Review of new simulation activities is completed and submitted to committee via SOLE**
- **Members of committee vote on approval Yes or No with suggestions.**

Appendix B: Review of New Simulation Activities

Activity Title:

Implementation Date/Time:

Instructor:

When reviewing the simulation activity, please verify that the following components are stated and/or appropriate:

- The activity has clearly defined objectives
- The description of the activity supports the objectives stated
- Simulation equipment requested is appropriate to support the objectives of the activity
- An appropriate assessment tool is being utilized
- Debriefing is included (if appropriate for the activity)

Additional Comments:

This simulation activity was reviewed by:

Committee Reviewer

Date

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Lee Ann Miller

Author

July 23, 2018

Date

Daniel Summers

Approver

July 23, 2018

Date

Policy: ED03
Adopted: December 7, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	December 7, 2017
2.0	Updated to common STEPS format policy	July 23, 2018

Equipment Loaning

Purpose:

To make STEPS equipment available to faculty, instructors, and learners for usage outside of STEPS facility. To ensure all equipment remains in good working order prior to loaning and after return. To track equipment for accountability and availability.

Scope:

Equipment may be loaned on a first-come, first-serve basis for educational activities at the discretion of the STEPS Director or designee. STEPS staff must ensure that the borrower is properly trained on the use of equipment. Equipment will be signed out and back in upon return, and inspected for lack of defects prior to leaving STEPS and immediately upon return by staff. Any defects will be noted with the borrower and reported to STEPS director. The borrower may be held responsible for any obvious misuse of equipment as deemed by STEPS Director.

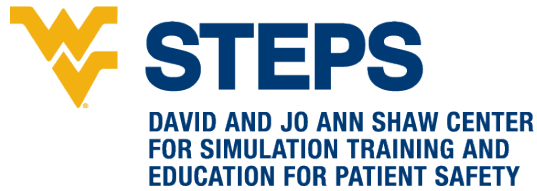
Responsibilities:

This policy applies to all staff, faculty, instructors and learners.

Definitions: None required for this policy.

Procedures:

Equipment may be loaned on a first-come, first-serve basis for educational activities at the discretion of the STEPS Director or designee. STEPS staff must ensure that the borrower is properly trained on the use of equipment. Equipment will be signed out and



Policy: EQ01
Adopted: January 23, 2017
Reviewed/Revised: July 23, 2018
Author: Daniel Summers
Approver: Dorian Williams

back in upon return, and inspected for lack of defects prior to leaving STEPS and immediately upon return by staff. Any defects will be noted with the borrower and reported to STEPS director. The borrower may be held responsible for any obvious misuse of equipment as deemed by STEPS Director.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Daniel Summers
Author

July 19, 2018
Date

X Dorian Williams
Approver

July 19, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	January 23, 2017
2.0	The SOP template was updated.	May 2, 2017
3.0	New Policy Format	July 23, 2018

Maintenance

Purpose:

To ensure optimal operation and safety of all equipment in the Simulation Center used in all aspects of clinical education.

Scope:

All STEPS staff and users dealing with equipment, particularly upkeep by simulation specialists.

Responsibilities:

Enforcement of this policy will be the responsibility of the direct supervisor for staff. Faculty not assigned directly to STEPS and guest instructors will be under the discretion of STEPS Director or Medical Director. It is the responsibility of all to police each other in order to maintain operational equipment at all times.

Definitions: None required for this policy.

Procedures:

Records of Equipment Maintenance

- The maintenance Log in the STEPS database is designed to record the problems identified, corresponding corrective actions the person performing the maintenance and the dates the repair was performed.
- The maintenance log is to be completed by the Simulation Specialist after

any repair or check and should include any records of calibration or repairs performed by the manufacturer or service organization.

- Responsibility for performing Maintenance and Performance Testing
 - Service technicians will perform required maintenance when service contracts and Maintenance agreements have been purchased for equipment.
 - Designated STEPS staff will perform and document required maintenance on other designated trainers and equipment

Defective Equipment

- Any suspected problem with the electrical function of equipment or appliances should be reported immediately to STEPS staff and the unit removed from service.
- The Simulation Specialists are responsible for coordinating repair or substitution of defective equipment.

References:

No References

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Russell Doerr
Author

July 19, 2018
Date

X Daniel Summers
Approver

July 19, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	February 23, 2017
2.0	The SOP template was updated	May 5, 2017
3.0	Updated to common STEPS format policy	July 19, 2018

Supply

Purpose:

To ensure that STEPS maintains an appropriate supply stock in order to ensure adequate resources needed to support the educational mission.

Scope:

This policy applies to all STEPS employees, but specifically, the designee(s) assigned to inventory, order, and stock supplies. The designee should be familiar with the educational needs of the center and the faculty using the center, and should be or include a Simulation Specialist/ Technician and the SON Director or Assistant Director of Simulation.

Responsibilities:

- STEPS Employee Designated to Supply (Supply Coordinator):
 - Will monitor schedule for upcoming events to ensure that supplies are ordered in a timely manner prior to an event, not less than two weeks prior.
 - Will maintain an appropriate level of stock held on hand that STEPS uses and keeps, in coordination with the Director and Simulation Specialists
 - Will order or coordinate supply orders between WVU Medicine Materials, Mountaineer Marketplace, Sterile Processing, and outside vendors.

- School of Nursing Inventory Designee:
 - The SON Designee will coordinate with the Supply Coordinator to ensure that SON events have needed equipment.
 - The SON Designee will coordinate with the SON Director of Simulation and the STEPS Director to bill supply orders to the correct department and budget

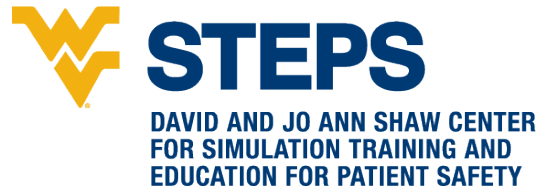
Definitions: None required for this policy.

Procedures:

In coordination with the Simulation Specialists, Director, SON Director of Simulation and SON Inventory designee, the Supply Coordinator will monitor the schedule and order appropriate numbers of supplies and equipment to ensure either an adequate amount on hand, or supplies specific to an event are received in advance. The Supply Coordinator will also routinely check quantities of stock on hand to ensure adequate levels.

Supplies that sharp, sensitive, costly, or restricted in their use shall be stored in a locked room designated for that purpose. Every effort will be made to restrict access to only the staff and learners who will be using said supplies and only during their scheduled time.

All medications in the Center are simulated (ie. Demo Dose) but are specifically purchased to look and feel like the real thing. All simulated medications are filled with distilled water and any real medications are discarded. Simulated medication poses a significant risk if mistakenly left in the patient care environment. As such, any educator or staff member that facilitates or performs in-situ simulation will ensure that all medications, supplies, and equipment are returned to the STEPS center (used or unused) and that a complete inventory of the crash cart and any other equipment is performed.



Policy: EQ03
Adopted: March 9, 2018
Reviewed/Revised: July 18, 2018
Author: Adam Hoffman
Approver: Daniel Summers

All medical equipment in the Center is intended for non-clinical use only and therefore cannot be used, on or offsite, in the care of actual patients. Equipment such as the defibrillators that may be taken to the clinical environment for in-situ simulation are marked "Simulation Use Only." Many items are donated or sold with the explicit understanding that they are intended for training purposes only and may be associated with legal agreements to that effect. None of the items onsite are maintained by clinical engineering nor are they cleaned and sanitized by environmental services.

The medical and disposable equipment within STEPS should never be used for clinical purposes. However, it should be treated with the same safety precautions employed with actual clinical equipment.

References:

WVU Medicine materials catalog

http://healthwebdev.rcbhsc.wvu.edu/plsql/oracle/procure_il1_catalog

OR 5 Catalog

http://nt-intranet.wvuh.wvuhs.com/plsql/oracle/procure_or5_catalog

OR 2 Catalog

http://nt-intranet.wvuh.wvuhs.com/plsql/oracle/procure_or2_catalog

Common Supply vendors (not a complete list)

Policy: EQ03
 Adopted: March 9, 2018
 Reviewed/Revised: July 18, 2018
 Author: Adam Hoffman
 Approver: Daniel Summers

<http://www.pocketnurse.com/> - Demo Dose medications

<https://www.simulab.com/> - Trauma Man tissues

<https://www.bluephantom.com/> - U/S blocks and tissues

<https://worldpoint.com/> - CPR Supplies

<https://www.limbsandthings.com/us/> - FLS supplies

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Daniel Summers
 Author

July 18, 2018
 Date

X Dorian Williams
 Approver

July 18, 2018
 Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	March 9, 2018
2.0	New Policy Format	July 18, 2018

Budget

Purpose:

To ensure a budgetary process is maintained and followed in order to fulfill the mission of STEPS, to be fiscally responsible, and to ensure the viability of STEPS into the future.

Scope:

Staff and leadership of STEPS.

Responsibilities:

WVU STEPS Group or Employee

- An internal budget will be developed for each fiscal year by the STEPS Director with input from faculty and STEPS staff for each area.
- Advisory committee will provide input regarding strategic planning for day to day operations and capital budget items.
- Budget will be reviewed and approved by STEPS Medical Director prior to submission to HSC Leadership.
- Budget will be submitted to HSC Leadership no later than May 30 of each year. Leadership will review and provide feedback to STEPS Director regarding approval of budget.
- Internally, STEPS will keep track of expenditures, maintain various accounts, and see that budgets are met.
- Additional expenditures necessitated by unforeseen expenses will be discussed and approved or denied by Medical Director, Director, and appropriate HSC Leadership.

Employee Responsibilities

- Primary budgetary responsibilities will be by STEPS Director with oversight of STEPS Medical Director.

Definitions: None required for this policy.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Daniel Summers

Author

July 23, 2018

Date

X Dorian Williams

Approver

July 23, 2018

Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	December 16, 2016
2.0	The SOP template was updated.	May 5, 2017
3.0	SOP Template updated to STEPS Common Format.	July 23, 2018

LearningSpace

Purpose:

The LearningSpace policy ensures the integrity and confidentiality of simulation information and student records of education stored in the Learning Management System.

Scope:

This policy applies to those with access to STEPS LearningSpace its components.

Responsibilities:

- **Admin**
 - Manage LearningSpace data and users/privileges in accordance with WVU Academic & Professional Standards.

- **Faculty Users**
 - Faculty-in-charge must request privileges for support staff from a STEPS LearningSpace Manager.
 - Faculty shall not share or save passwords in a manner that compromises security.
 - Faculty must protect confidentiality and integrity, maximizing educational value and personal security.
 - Faculty must utilize LearningSpace for the purpose of education, simulation, evaluation, and/or research. Use for any other reason shall be reviewed and authorized in advance by the STEPS Director/Medical Director.

- **Learners**

- Learners shall not share or save passwords in a manner that compromises security.
- Any unauthorized review, use, disclosure, or distribution is prohibited.
- Learners must utilize LearningSpace for purposes of education, simulation, evaluation, and/or research. Use for any other reason shall be reviewed and authorized in advance by faculty-in-charge.

- **Multiple-Privilege Users**

- Those with multiple-privileges in LearningSpace are responsible for knowing their appropriate role.

Definitions:

Term or Acronym/Abbreviation	Definition
Faculty Users	A person with Faculty privileges in LearningSpace, including but not limited to a combination of Admin, Video Management, Learning Management, User Management, Report Management, and/or Data Entry
Learner	A person with Learner privileges in LearningSpace
Multiple-Privilege User	A LearningSpace user that has a combination of roles that can include faculty, learner, and/or Standardized Patient roles.

Procedures:

- Any unauthorized review, use, disclosure, or distribution is prohibited

- LearningSpace will only be used for the authorized purposes of education, simulation, evaluation, and research. Use for any other reason shall be reviewed and authorized in advance by the STEPS Director/Medical Director.
- Any information stored in LearningSpace shall only be shared with authorized personnel at the discretion of the faculty in charge. This includes, but is not limited to: videos, reports, users, passwords, cases, activities, emails, and live video streaming.
- Master passwords are to be given only to authorized personnel by the discretion of the Director/Medical Director.

References:

- WVU HSC Student Conduct policy:
<http://publichealth.hsc.wvu.edu/student-services/student-policies/student-code-of-conduct-policy/>
- WVU Academic & Professional Standards:
<http://catalog.wvu.edu/graduate/enrollmentandregistration/#academicintegritytext>

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Kathryn Smalley
Author

July 19, 2018
Date

X Daniel Summers
Approver

July 19, 2018
Date

Policy: IN01
 Adopted: December 14, 2016
 Reviewed/Revised: July 19, 2018
 Author: Kathryn Smalley
 Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	12/14/2016
1.1	The SOP template was updated	12/18/2017
1.2	SOP template was updated, Author signature line re- inserted	1/29/2018
2.0	Updated to common STEPS format policy	7/19/2018

Audio-Video Retention, Archival, and Destruction

Purpose:

All simulations may be recorded using the STEPS video-capture and learning management system. The recordings allow for review of the activity for education, formative and summative evaluation, quality assurance and research. This policy defines the circumstance for retention, archival and destruction of audio and video recordings. Ensure that STEPS complies with West Virginia University record retention policies.

Scope:

This policy applies to:

- All staff, faculty, and instructors representing STEPS
- All learners utilizing STEPS onsite, in situ or remotely
- Particular STEPS staff with privileges to adjust video recording and viewing settings within STEPS video-capture and learning management system.

Responsibilities:

STEPS

Definitions: None required for this policy.

Procedures:

- Recorded audio-video is stored in our learning management system accessible from password protected servers as per SOP **IN03** Audio-Video Recording
- STEPS is responsible for the management of the audio/video system and has exclusive control of the release of recordings produced by this system.
- In general, recorded audio/video will be kept until the end of the following entire academic year and deleted over the following 6 months. For example, recordings between July 1, 2017 and June 30, 2018 will be kept until at least July 1 2019; they will be deleted between July 1 2019 and Dec 30, 2019. Exceptions:
 - Any audio/video documenting a summative grade will be retained to comply with the involved learner's School or Organization policy. Upon completion of a summative video, it will be "locked" in LearningSpace by administrator of course, either if they have sufficient level of access, or notify STEPS Simulation Information Specialists to do so.
 - Any audio/video used for research. All such audio/video requires Institutional Review Board (IRB) approval and will be retained per the study protocol.
 - If a relevant video is believed to be useful for another purpose, for example, education in another course or as promotional material, a permanent video clip of the experience will be made available to the requester per authorization both by the STEPS Director (or designee) and the activity director.
 - Authorizations will be kept on file.

- Specific videos requested for use outside of the activity will generally be converted into a permanent video clip and transferred to the requester once approved.
- Audio/Video recordings may be deleted immediately after non-summative events at the request of the activity/course director.

References:

SOP IN03 Audio-Video Recording

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Russell Doerr

Author

January 29, 2018

Date

X Daniel Summers

Approver

January 29, 2018

Date

Policy: IN02
Adopted: January 29, 2018
Reviewed/Revised: July 19, 2018
Author: Russell Doerr
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	1/29/2018
2.0	Updated to common STEPS format policy	7/19/2018

Video Recording

Purpose:

The purpose of this policy is to outline the storage and use guidelines for recordings created in the STEPS A/V system.

Scope:

This policy applies to all use of the A/V system for capturing and storing video of educational activities.

Responsibilities:

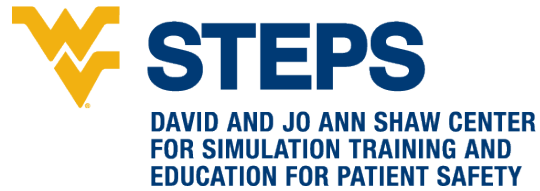
- **Medical Director** makes final decisions on a/v storage, use, and distribution. This power is also delegated to the director.
- **Director** makes decisions on a/v storage, use, and distribution. This power is also delegated to the Learning Management Administrators.
- **Learning Management Administrators** make decisions about a/v storage, use, and distribution, based on the wants and needs of the course instructors.
- **Course Instructor** must know video policy guidelines and communicate if and why videos must be stored longer than the policy suggests.
- **Supporting faculty, staff, and instructors**
- **Learners**

Definitions:

Term or Acronym/Abbreviation	Definition
a/v	audio/visual

Procedures:

- The video system is primarily used to record simulation based educational activities. The recordings allow for review of the activity for both formative and summative evaluation. Video is never used in areas where personnel would have an expectation of privacy, such as restrooms or locker rooms.
- Prior to utilizing the STEPS Center, a Video/Photo release must be signed by all learners, faculty, staff, standardized patients, and any other individual that has the potential of being recorded (reference Video/Photo Release policy for further information) in order to utilize the center. If a learner disagrees, the course faculty must decide how to proceed with their simulation.
- All video cameras are capable of being recorded continuously by a digital video recording system. Recorded video is stored in our Learning Management system accessible from password-protected servers and is used for education and evaluation of our learners as well as investigative research activities. STEPS is responsible for the management of the video system and has exclusive control of the release of video recordings produced by this system. Recorded video is not routinely made directly available to learners, or the general public. The director of each course shall determine if any video relevant to the experience should be available to the learner group or others. Requests to provide access to video recordings will be considered based upon agreement between the course faculty and STEPS. If a relevant video is believed to be useful for another course, as an example, or as promotional material, a permanent video clip of the experience



Policy: IN03

Adopted: January 1, 2017

Reviewed/Revised: December 12, 2019

Author: Kathryn Smalley

Approver: Daniel Summers

will be made available to the requester per authorization by the Director or designee.

- Recorded video is stored according to policy **IN02** referring to audio visual record retention. Specific videos requested for use outside of the activity will generally be converted into a permanent video clip and transferred to the requester once approved.

Video/Photo/Tour Release

By submitting this response I consent to be observed, audio/video recorded, and/or photographed during simulation activities, and understand that these may be used by West Virginia University on behalf of STEPS for any reasons including but not limited to documentation of training, evaluation of performance, fund raising activities, advertising, promotions, and educating about simulation in health care.

By my consent to participate in the Simulation Activity, I hereby authorize STEPS to use audio/video recording and/or photograph, and transmit my name, image, voice, or contributions in connection with the Simulation Activity for the above stated purposes. I assign to STEPS any property rights, including but not limited to copyright, that I might have in any of my course contributions or in the recordings or photographs, and I agree that I will not receive any compensation for my participation. Additionally, I hereby release STEPS and the Board of Governors of West Virginia University, its members, officers, and employees from liability for any and all claims or causes of action of whatever kind or nature, whether known or unknown, foreseeable or unforeseeable, including but not limited to invasion of privacy or copyright infringement arising out of my participation in the Simulation Activity.

I acknowledge that I am at least eighteen (18) years old OR, in the event the participant is under 18, the parent or guardian acknowledges, that this Authorization, Assignment, and Release of Liability Agreement has been read and understood and is being voluntarily accepted.

References:

Policy IN02 – Audio Video Retention, Archival, and Destruction

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Kathryn Smalley

Author

December 12, 2019

Date

X Daniel Summers

Approver

December 12, 2019

Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	1/1/2017
2.0	The SOP template was updated and the Video Recording process was further defined.	12/18/2017
2.1	Updated to reflect current practices and to reflect current numbering convention.	1/29/2018
3.0	Updated to common STEPS format policy	7/19/2018
3.1	Standardized with IN02	8/1/2018
3.2	Updated Consent Form	12/2/2019

Website

Purpose:

The purpose of this SOP is to define changes and approvals for content to be developed and/or created for use on the STEPS website.

Scope:

Any person(s) requesting to make content changes or develop website items

Responsibilities:

- **WVU STEPS Group or Employee**
 - **Management of STEPS**
 - Management in STEPS has final say of what content may or may not be added to the website as well as changes made to the SOP
 - **Website Committee**
 - Develop or coordinate development and uploading of content upon approval
 - **Employee Responsibilities**
 - Specific roles and responsibilities for employees if groups of employees are identified above.
 - **Medical Director or designee**
 - Member of “Management of STEPS” group. Responsibilities designated in its respective section.

- **Director or designee**
 - Member of “Management of STEPS” group. Responsibilities designated in its respective section.

- **Website Committee Chair**
 - Member of “Website Committee”. Responsibilities include informing Management of STEPS on any content changes and ensure content that approved is created or uploaded as well as responsibilities designated in its respective section.

- **Website Committee Members**
 - Member of “Website Committee”. Responsibilities designated in its respective section.

Definitions:

Term or Acronym/Abbreviation	Definition
Content	Any material (text, images, etc.) added to website
CMS	Content management system
Website Design	Themes and layouts (how content is configured to appear) on website

Procedures:

- All content must be compliant with WVU Policies and guidelines set by the University relations department as well as following the HSC ITS Website Content Guide located on the Website Support page. WVU and HSC Policy in References.

- Website design is managed by ITS Web Development services and they must be contacted for design changes. See WVU Policy in References.
- **Content Additions and Updates**
 - **Website change approval**
 - A request must be sent to the Website Committee for any additions or changes made to the website. After the request, the Website Committee will collect any further information needed. Once information is collected, content changes will be sent to the STEPS management group for approval.
 - **Content development**
 - Content will be given or created by the website committee after approval of the change
 - **Website content approval**
 - After content is developed, approval by both the website committee as well as the management of STEPS is required.
 - **Publish content**
 - Once the content is changed, the website committee chair(s) will publish content in the CMS.

References:

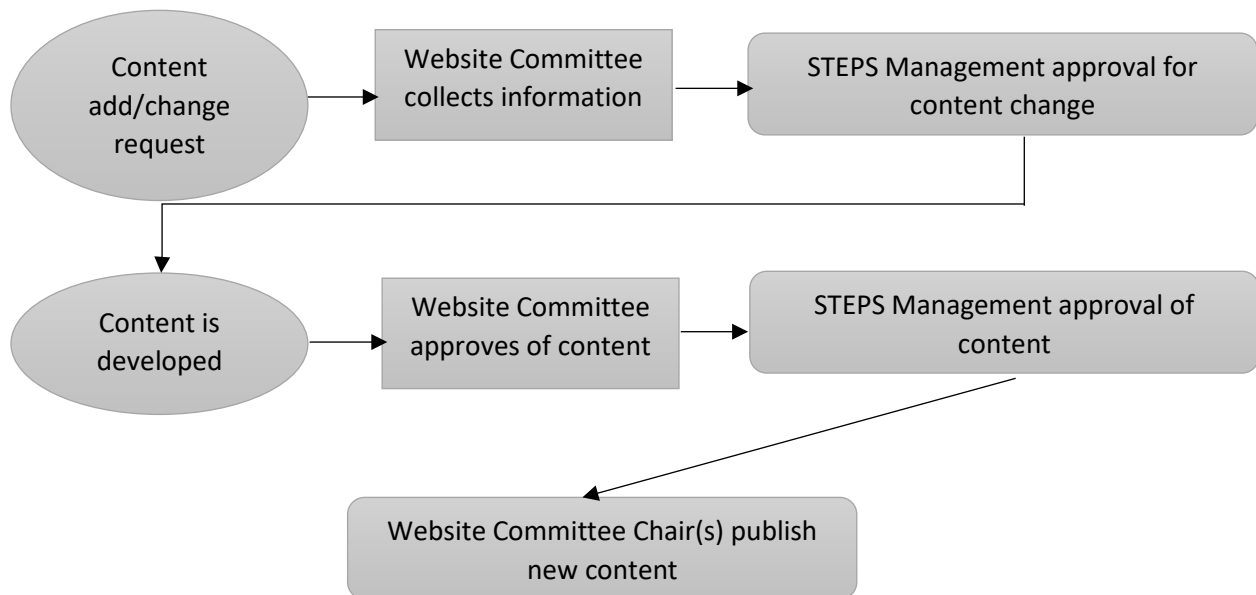
University Relations Policy and Guidelines:

<http://universityrelations.wvu.edu/digital-services/policies-and-guidelines>

HSC ITS Website Support:

<https://its.hsc.wvu.edu/website-support>

Appendix A: Flowchart of approval procedure for content additions or changes



Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Lee Ann Miller
 Author

July 20, 2018
 Date

X Daniel Summers
 Approver

July 20, 2018
 Date

Policy: IN04
Adopted: January 23, 2018
Reviewed/Revised: July 20, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	1/23/2017
2.0	Updated to common STEPS format policy	7/20/2018

Password

Purpose:

To ensure the integrity and confidentiality of course information and student educational records.

Scope:

This policy applies to all staff, faculty, and learners with access to any password protected system used in STEPS. This includes, but is not limited to, LearningSpace, SOLE, and WVU myID.

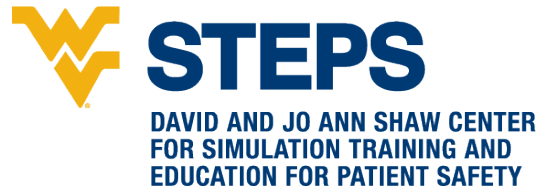
Responsibilities:

It is the responsibility of all staff, faculty, and learners to keep their passwords safe and up-to-date. Master passwords are to be given only to authorized personnel by the discretion of the Director/Medical Director.

Definitions: None required for this policy.

Procedures:

All staff, faculty, and learners shall not share passwords or save passwords in a manner that compromises its security. Users are responsible for the integrity of their password.



Policy: IN05
Adopted: December 14, 2016
Reviewed/Revised: July 23, 2018
Author: Kathryn Smalley
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Kathryn Smalley
Author

July 23, 2018
Date

X Daniel Summers
Approver

July 23, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	December 14, 2016
2.0	New Policy Format	July 23, 2018

IT Security Policy

Purpose:

The purpose of this policy is to provide protection for all information that is used, stored, and shared at STEPS.

Scope:

As an entity of WVU HSC, all STEPS staff, faculty, and users follow the HSC IT Policy Manual for matters regarding information technology.

Responsibilities:

Please refer to the WVU HSC IT Policy Manual for further responsibilities (see reference section of this document)

Definitions:

- WVU- West Virginia University
- HSC – Health Sciences Center
- IT – Information Technology

Procedures:

Please refer to the WVU HSC IT Policy Manual for further procedures (see reference section of this document)

References:

HSC IT Policy Manual - <https://its.hsc.wvu.edu/policies>

Policy: IN06
Adopted: April 17, 2019
Reviewed/Revised: 4/17/2019
Author: Kathryn Smalley
Approver: Daniel Summers

X Kathryn Smalley
Author

April 17, 2019
Date

X Daniel Summers
Approver

April 17, 2019
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	4/17/2019

Scheduling

Purpose:

The purpose of this policy is to describe the scheduling process, including priority scheduling.

Scope:

This policy applies to all individuals and entities requesting STEPS space and/or STEPS faculty & staff.


Responsibilities:

- **WVU STEPS Faculty & Staff Roles & Responsibilities**
 - **Medical Director** approves schedule upon review and provides final say to conflict. This may be delegated to the director.
 - **Director** oversees schedules and provides input to scheduling conflicts. This may be delegated to administrative associate.
 - **Administrative Associate** oversees schedulers.
 - **Scheduler** sends priority scheduling email, implements schedule policy, guides individuals and entities to ensure they request what they need, inputs approved events onto the STEPS SharePoint calendar
- Entities/Individuals Requesting STEPS Space/Faculty must follow the procedures for scheduling

Definitions: None required for this policy.

Procedures:

Scheduling requests are accepted approximately 6 months prior to the beginning of each semester. Dates are listed in emails sent by STEPS scheduler. Following designated priorities and due dates, STEPS space and faculty will be assigned. When the priority due dates have passed, scheduling will be on a first-come, first-serve basis. In order to keep things as organized as possible, we would prefer that requests not be sent in prior to the dates indicated for each semester. Please use the request form provided online (see resource section of this document for a link).

- In order to request events and/or faculty & staff, as well as view the STEPS calendar, please see the STEPS web calendar.
- A link to the web calendar may be found in the resources section of this document. To schedule days and times for your simulation event, choose “Schedule an Event”.
- Put your name as course scheduler. Start by typing in your e-mail, then hit enter or click the check names icon - . (You can use the address book at the end of the line to search for names.) As course scheduler, you will be emailed a notice when STEPS has received the form, and a confirmation once it has been approved. Please also fill in the Course Instructor.
- Simulation Instructor will be filled out by STEPS.
- If you are scheduling multiple times for the same event; (i.e. Days in a row, once every week on Monday, Friday, etc.), please fill out the “explanation of reoccurring event” field as well.
- The items required are denoted by the red asterisk (*) in the required field.
- Forms need to be filled out completely in order for us to assign the proper rooms and equipment.
- Fill out all of the fields pertaining to your request. The following items will help us better meet your educational needs:
 1. The number of participants
 2. Three (3) educational objectives
 3. A detailed description of the simulation
 4. Standardized Patients (yes or no)

5. LearningSpace needed (yes or no)
 6. Equipment, personnel, etc.
- You will receive a notice that your request was received by STEPS. You will also receive a confirmation once the event has been scheduled.

References:

STEPS Schedule Request:

<https://wvuhsc.sharepoint.com/sites/wvusim/STEPS/stepscalendar/Lists/New%20Event%20Request%20Form/Datasheet%20View.aspx>.

STEPS Scheduling Email:

TO: Simulation Scheduler

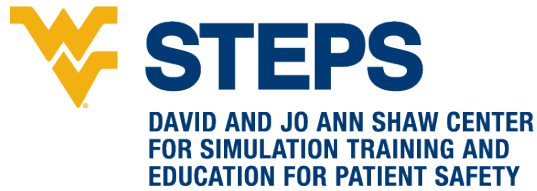
Please read carefully.

Directions for Scheduling:

We are now accepting scheduling requests for **Fall Semester 2020 & Spring & Summer Semester 2021**. Dates are listed on the next page. Following our designated priorities and due dates, we will make assignments. When the priority due dates have passed, scheduling will be on a first-come, first-serve basis. In order to keep things as organized as possible, we would prefer that requests not be sent in prior to the dates indicated for each semester. Please use the request form provided online.

• In order to request events, as well as viewing our calendar, go to our website calendar page below. Click on the link below and follow the login instructions on this page.

- <http://steps.wvu.edu/about/internal-resources/calendar/>
- To schedule days and times for your simulation event, choose "Schedule an Event".
- • Please put **your email address in the "Email of person scheduling this activity"**. Start by typing in your e-mail, then hit enter or click on next box. As course scheduler, you will be emailed a notice when STEPS has received the form, and a confirmation once it has been approved. Please also fill in the Course Instructor. Simulation Instructor will be filled out by STEPS.
- If you are scheduling multiple times for the same event; (i.e. Days in a row, once every week on Monday, Friday, etc.), please fill out the "explanation of reoccurring event" field as well as the number of participants per time session.



Policy: OP01
Adopted: April 10, 2018
Reviewed/Revised: April 23, 2019
Author: Kathryn Smalley
Approver: Daniel Summers

- The items required are denoted by the red asterisk (*) in the required field.
- **IMPORTANT-** Please do your best to fill out all of the fields pertaining to your request in order for us to assign the proper rooms and equipment. The following items will help us better meet your educational needs.
 1. the number of participants
 2. three educational objectives
 3. detailed description of the simulation
 4. Standardized Patients (yes or no)
 5. LearningSpace needed (yes or no)
 6. Equipment, personnel, etc.

You should receive notice that your request was received by STEPS. You should also receive a confirmation once the event has been scheduled. **Please watch for these e-mails and if you do not receive either of them or there is a question about them, please contact us at 293-7837.**

If you need further assistance, contact us by phone 293-7837 or email wvsteps@hsc.wvu.edu.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X **Kathryn Smalley**
Author

July 23, 2018
Date

X **Daniel Summers**
Approver

July 23, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	February 5, 2018
2.0	Updated to common STEPS format policy	July 23, 2018
2.1	Updated Scheduling Letter	April 23, 2019

Center Usage

Purpose:

To ensure that ground rules are established to govern the conduct and operation of simulation encounters and participants in the center.

Scope:

This policy applies to all individuals who utilize STEPS.

Responsibilities:

- **STEPS Management**
 - Overall enforcement of policy.
- **STEPS Staff**
 - Monitoring of Faculty/Instructors and Learners for policy compliance.
- **Faculty/Instructors**
 - Adherence to policy and monitoring Learners for policy compliance.
- **Learners**
 - Adherence to policy.

Definitions:

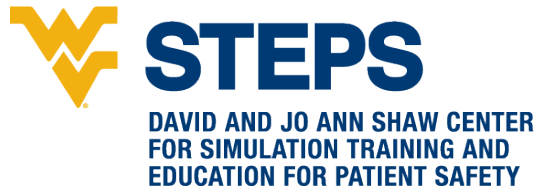
Term or Acronym/Abbreviation	Definition
SEU	Surgical Education Unit, Room 3518

Procedures:

- No uncovered drinks are allowed in simulated clinical areas. Absolutely no food or drink is permitted in close proximity to simulators or simulation equipment.
- No jacket, coats, school bags, or purses are to be placed on the beds or floor space. All personal items are to be left in the provided lockers or designated space.
- Pencil only- no pens allowed around manikins or task trainers. Never write or draw on the simulators because it will permanently remain on the skin.
- All equipment and supplies must be returned to the marked location.
- Before leaving STEPS, all beds should be lowered and neatly made.
- All medical sharps (needles, etc.) must be properly disposed of by the person using them.
- Always treat and care for the simulators with respect, as you would a real patient. It is an expectation that all staff, faculty, instructors, and learners demonstrate professionalism when utilizing equipment and space within STEPS.

References:

None required for this policy.



Policy: OP02
Adopted: December 14, 2016
Reviewed/Revised: April 4, 2019
Author: Jason Craig
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X **Jason Craig**
Author

April 4, 2019
Date

X **Daniel Summers**
Approver

April 4, 2019
Date

Policy: OP02
Adopted: December 14, 2016
Reviewed/Revised: April 4, 2019
Author: Jason Craig
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	December 14, 2016
2.0	Updated to common STEPS format policy	July 23, 2018
3.0	Procedure Update	April 4, 2019

Learner Confidentiality

Purpose:

To provide a consistent, psychologically safe environment and experience to learners, and to preserve the integrity of simulation activities.

Scope:

Applies to all users of STEPS.

Responsibilities:

All individuals who utilize STEPS have the responsibility to maintain a confidential and professional atmosphere. Individual responsibilities are outlined in the procedure below.

Definitions:

None

Procedures:

- STEPS Staff:
 - Responsible for ensuring that this policy is followed.
 - Maintain integrity of information and activities
 - Preserve learner confidentiality with regard to personal information, grades, and performance

- Any suspected violations of confidentiality as described in this policy should be forwarded in writing to the STEPS Director or appropriate faculty, and shall include information to support the investigation of the violation.

- Faculty/Educators:
 - Responsible for ensuring that this policy is followed.
 - Maintain integrity of information and activities
 - Preserve learner confidentiality with regard to personal information, grades, and performance
 - Any suspected violations of confidentiality as described in this policy should be forwarded in writing to the STEPS Director or appropriate faculty, and shall include information to support the investigation of the violation.
 - Communicate levels of expected confidentiality to STEPS Staff when developing/designing simulation activities.
 - Explain the policy and expected level of confidentiality to learners upon STEPS Orientation and/or activity prebriefing.

- Learners:
 - Responsible for adhering to the established policy.
 - Maintain integrity of information and activities
 - Preserve confidentiality with regard to personal information, grades, and performance
 - Any suspected violations of confidentiality as described in this policy should be reported to the STEPS Director or appropriate faculty/staff, and shall include information to support the investigation of the violation.

- Formative and/or Summative Assessment will remain completely confidential by all, and only shared as appropriate.

References:

Policy SA04 related to Psychological Safety

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Christy Barnhart

Author

April 16, 2019

Date

Daniel Summers

Approver

April 16, 2019

Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	May 24, 2017
2.0	The SOP template was updated.	July 23, 2018
3.0	Moved Psychological Safety comments to Psychological Safety Policy (SA04)	April 9, 2019
4.0	Rewrite and Clarification of Policy	April 16, 2019

Participant and Observer Safety

Purpose:

To ensure that the risk of unintentional injury to learners or observers is minimized, and to create a safe learning and evaluating environment.

Scope:

All STEPS employees, educators, learners, and observers.

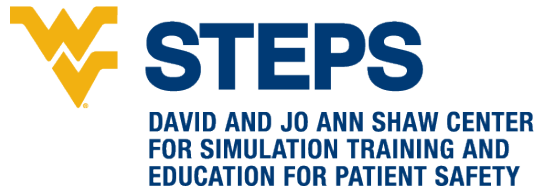
Responsibilities:

All persons within the STEPS facility, more especially educators, STEPS staff and the STEPS Director.

Definitions: None required for this policy.

Procedures:

Educators and STEPS staff are to ensure that learners are engaged in proper behavior and operation of equipment during their learning encounter. If multiple learners are taking turns using the same equipment, educators and STEPS staff are responsible for ensuring that either the last learner leaves the station in a safe condition, or the educator or staff member performs that duty. Educators and STEPS staff are also responsible for ensuring observers maintain a safe distance from the activity taking place. Faculty/Instructor permission must be obtained prior to outside observation. Any person within the STEPS facility has the authority to immediately stop an activity if he/she believes that a safety hazard is present.



Policy: OP04
Adopted: March 21, 2017
Reviewed/Revised: April 22, 2019
Author: Jason Craig
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Jason Craig
Author

April 22, 2019
Date

X Daniel Summers
Approver

April 22, 2019
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	March 21, 2017
2.0	New Policy Format	July 23, 2018
2.1	Addressed Observer Permission	April 22, 2019

Learner Complaint Resolution

Purpose:

To provide a plan/procedure to ensure learners have a means to register a complaint and follow it to resolution.

Scope:

This policy applies to all staff, faculty, and instructors representing STEPS.

Responsibilities:

Enforcement of the policy will be the responsibility of faculty involved in the session followed by STEPS staff, and ultimately STEPS Director and/or Medical Director.

Definitions: Definitions if required for this policy.

Procedures:

- Most sessions conducted within STEPS are followed up with an evaluation that is reviewed by the EQI committee. This process is well described in the EQI committee policies.
- If a learner has a complaint that needs to be addressed during or immediately after the session they are encouraged to go to the faculty in charge of the session or to STEPS staff involved.
- Should the learner not feel comfortable with this course of action they may ask to speak with the STEPS Director.
- It is the responsibility of the one to whom the complaint was reported to see that it is properly taken through the channels, and an appropriate resolution is made and reported back to the learner.
- Further, each school has a policy for conflict resolution and the learner can pursue the complaint through those means.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Daniel Summers

Author

November 1, 2018

Date

X Dorian Williams

Approver

November 1, 2018

Date

Policy: OP05
Adopted: November 1, 2018
Reviewed/Revised: November 1, 2018
Author: Daniel Summers
Approver: Dorian Williams

Chronological Revision History

Version	Modification	Date
1.0	New Policy	November 1, 2018

Professionalism

Purpose:

To ensure STEPS staff, faculty, and learners conduct themselves in a professional manner, upholding the highest standards of WVU, HSC, and individual programs.

Scope:

This applies to all who utilize STEPS.

Responsibilities:

Enforcement of the policy will be the responsibility of all faculty, staff, and learners that utilize STEPS.

- Learner – Treat other students, faculty and staff, with dignity and respect. Maintain learner confidentiality.
- Faculty - Treat students, faculty and staff, with dignity and respect. Maintain learner confidentiality.
- Staff - Treat students, faculty and staff, with dignity and respect. Maintain learner confidentiality.

Definitions: None

Procedures:

STEPS expects all to follow professionalism guidelines by WVU, HSC, and each individual school or program.

Links provided for each program's policies.

WVU

<https://studentconduct.wvu.edu/>

SON

<https://nursing.hsc.wvu.edu/media/74526/2018-19-ug-handbook-81418.pdf>

<https://faculty.wvu.edu/files/d/da823b3c-8a3d-45aa-b22a-ae699bb7db20/faculty-handbook-8-17-17.pdf>

Pharmacy

<https://pharmacy.hsc.wvu.edu/media/1937/wvu-sop-student-code-of-academic-and-professional-integrity-document.pdf>

SOM

<https://medicine.hsc.wvu.edu/media/361658/academic-and-professionalism-standards-governing-the-md-degree09program-final63017.pdf>

<https://medicine.hsc.wvu.edu/media/2989/student-code-of-academic-and-professional-integrity-for-the-m.pdf>

Dentistry

<https://dentistry.hsc.wvu.edu/media/1069/policy-on-academic-and-professional-standards.pdf>

Public Health

<https://publichealth.hsc.wvu.edu/students/student-resources/policies-forms/student-code-of-conduct-policy/>

WVU Medicine

<https://wvumedicine.org/wp-content/uploads/2018/12/Code-of-Ethical-Conduct-12182018.pdf>

Policy: OP06
Adopted: April 19, 2019
Reviewed/Revised: April 19, 2019
Author: Jason Craig
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Jason Craig

Author

April 19, 2019

Date

X Daniel Summers

Approver

April 19, 2019

Date

Policy: OP06
Adopted: April 19, 2019
Reviewed/Revised: April 19, 2019
Author: Jason Craig
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New Policy	April 19, 2019

Psychological Stress

Purpose:

While STEPS makes every attempt to ensure that learners experience a psychologically safe environment, unknown events from the learner's past may cause undue stress in what may otherwise be considered a safe scenario. In an effort to mitigate the impact of this stress to the learner, this policy has been created to provide a plan/procedure to ensure learners that have an undesirable/stressful psychological reaction to an educational activity in STEPS have a means for immediate care and follow-up.

Scope:

This policy applies to all staff, faculty, and instructors representing STEPS.

Responsibilities:

Enforcement of the policy will be the responsibility of faculty involved in the session followed by STEPS staff, and ultimately STEPS Director and/or Medical Director.

Definitions:

Carruth Center
Health and Education Building
390 Birch Street
P.O. Box 6422 Morgantown, WV 26506
304-293-4431wvucccps@mail.wvu.edu

Procedures:

- Faculty and staff are to monitor learners during sessions conducted in STEPS to ensure psychological safety at all times.
- If a learner acknowledges and/or is determined to be having an adverse psychological stress event during or after a session, the following steps will occur:
 - Faculty or staff will discuss situation with learner and determine if they can continue in the session or if further assistance is needed
 - If needed, learner will be removed from session and have an appropriate individual stay with them.
 - Either faculty from that discipline or the STEPS Director (or designee) will be notified.
 - Based on the learner's needs, they will be allowed to return to the session or monitored.
 - If the learner or the one watching them deem further assistance is needed they will be provided with information to contact the Carruth Center.
 - Should the learner be deemed to be in significant psychological stress, they will be accompanied either to the Emergency Department or to the Carruth center.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Christy Barnhart
Author

April 9, 2019
Date

X Daniel Summers
Approver

April 9, 2019
Date

Chronological Revision History

Version	Modification	Date
1.0	New Policy	November 1, 2018
2.0	Revised Policy to expand purpose and clarify procedure.	April 9, 2019
2.1	Renamed Policy to Psychological Stress	May 11, 2020

Psychological Safety

Purpose:

To ensure a psychologically safe environment in which students feel free to express ideas and make mistakes without fear of being discounted or ridiculed.

Scope:

This policy applies to all staff, faculty, learners and instructors representing STEPS.

Responsibilities:

Enforcement of the policy will be the responsibility of faculty involved in the session followed by STEPS staff, and ultimately STEPS Director and/or Medical Director.

Definitions:

Psychological Safety:

- A feeling (explicit or implicit) within a simulation-based activity that participants are comfortable participating, speaking up, sharing thoughts, and asking for help as needed without concern for retribution or embarrassment.
- The perception of members of the team that the team is safe for risk taking, and mistakes will be considered learning opportunities rather than there being embarrassment or punitive consequences (Edmondson, 1999; Higgins et al, 2012).

Procedures:

- Learners are to be informed during orientation and/or prebriefing that a psychological safety policy is in place and remind them that the simulation center is a safe learning environment in which they are free to explore and express ideas and make mistakes without fear of being discounted, ridiculed or embarrassed.
- This rule shall not apply during summative assessment insofar as the definition of safe learning environment changes and consequences exist for mistakes, such as effects on grades, etc. Other aspects of this policy, such as the learner feeling safe from ridicule, etc. will still apply in these circumstances.
- Faculty and staff are to monitor learners during sessions conducted in STEPS to ensure psychological safety at all times.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Jason Craig
Author

May 11, 2020
Date

X Daniel Summers
Approver

May 11, 2020
Date

Policy: OP08
Adopted: May 11, 2020
Reviewed/Revised: May 11, 2020
Author: Jason Craig
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New Policy	May 11, 2020

Research Committee

Purpose:

The purpose of this policy is to define the roles and responsibilities of the research committee, identify core members of the committee and define the expectations as described in the general Institutional Review Board (IRB) protocol for projects involving simulation-based research.

Scope:

STEPS assembled a research committee to oversee the general IRB protocol for projects involving simulation-based research. This group monitors educational research conducted using simulation modalities to assure compliance with IRB policies and promote high-quality research. The committee also provides assistance with establishing a timeline for project completion.

Responsibilities:

Members include the STEPS Medical Director who is the Principal Investigator (PI) on the general protocol, the Administrative Research Coordinator, the Director of Simulation, the Assistant Director of Education and Evaluation, the lead Simulation Specialist, and members at large from the schools of the Health Sciences Center. This interdisciplinary group reviews all educational research studies utilizing the IRB-approved umbrella research protocol to assure that they meet the standards set forth in the protocol. Members can help educators identify research questions, develop methods to collect data, and report the findings for conferences, journals and other forms of scholarly dissemination. The committee can help link educators with similar interests to promote quality projects that advance knowledge about simulation and its impact on learners. The committee will elect a chairperson from the membership.

▪ **Medical Director**

- Serves as the Principal Investigator on the general IRB
- Works with the committee chair to develop meeting agendas
-
- Has overall responsibility for ensuring appropriate use of STEPS facilities and staff for research purposes.

▪ **Research Committee Chair**

- Sets meetings agendas with input from the STEPS Medical Director.
- Leads committee meetings
- Assigns mentors, with input from the Assistant Director of Education and Evaluation, as needed for novice researchers
- Composes letters of acceptance or denial of projects

▪ **Administrative Research Coordinator**

- Assists committee chair and medical director with meeting agendas
- Takes meeting minutes, disseminates them to members and files them for later reference.
- Acts as a point of contact for committee business.

Policy: RE01

Adopted: July 1, 2017

Reviewed/Revised: December 12, 2018

Author: Russell Doerr

Approver: Daniel Summers

- Maintains communications for the committee to include scheduling meetings and distributing project information and letters.
 -
 - Maintains records of approved research projects and data for the specified period for each project, or the IRB whichever is greater.
 - Maintains records of all submitted projects and decision documents for a period of one (1) year from submission date.
- **Committee Member**
- Assists and mentors interested educators when asked
 - Reviews and approves submitted project proposals
 - Actively participates in meetings and committee correspondence.

Definitions:

Term or Acronym/Abbreviation	Definition
IRB	Institutional Review Board
Project	Specific Educational research being performed under the STEPS IRB-approved umbrella protocol
Protocol	The STEPS general IRB-approved protocol that describes the essential steps necessary for educational research projects approved by the committee.

Procedures:

The research committee communicates regularly via electronic communication methods and physically meets at scheduled times to approve projects that are submitted, provide assistance to prospective educators and assign mentors to novice researchers.

Policy: RE01
 Adopted: July 1, 2017
 Reviewed/Revised: December 12, 2018
 Author: Russell Doerr
 Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Russell Doerr
 Author

October 12, 2018
 Date

X Daniel Summers
 Approver

October 12, 2018
 Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	1/23/2017
2.0	Updated to common STEPS format policy	7/23/2018
3.0	Split to cover just committee responsibilities	12/12/2018

Research Process

Purpose:

The purpose of this policy is to outline the process for conducting research projects through the David and Joann Shaw Center for Simulation Training and Education for Patient Safety (STEPS) including proposal development, mentorship, and project management. The policy details each step of the research process, while providing guidance as to how to access the resources available along the way.

Scope:

With the increase in research productivity, largely due to the success of the interdisciplinary STEPS research committee, investigators are requesting additional assistance with their research projects, beyond committee review and timeline assistance. This policy will provide information to investigators who wish to utilize STEPS research resources for their projects.

Responsibilities:

Conducting research can be a daunting process for some investigators. Therefore, this policy will provide step-by-step research guidance from the initial conception of an idea to the end product of a publication in a peer-reviewed journal of the investigator's choice. Should an investigator desire to conduct research through STEPS, this policy will be provided to them upon notification of their interest, with certain steps in the policy being mandatory to STEPS.

Definitions:

Term or Acronym/Abbreviation	Definition
IRB	Institutional Review Board
Project	Specific Educational research being performed under the STEPS IRB-approved umbrella protocol
Protocol	The STEPS general IRB-approved protocol that describes the essential steps necessary for educational research projects approved by the committee.

Procedures:

Upon notification by the investigator of interest in conducting simulation-focused research via STEPS, the following procedures are in place to guide the investigator through the research process. See Appendix A for complete contact list for all positions listed in this document.

**Indicates mandatory steps for investigators to participate in STEPS research projects*

Pre-IRB Approval –

1. Research Design Development

- a. Should an investigator desire assistance with solidifying the appropriate design that best fits the outcomes for their project, STEPS has a research coordinator that can provide guidance.
- b. Contact: Administrative Research Coordinator

2. Research Question / Hypothesis Development

- a. Ensuring the success of a research project at STEPS begins with the solid foundation of a research question and hypothesis. STEPS has a research

coordinator that can assist investigators with proper question and hypothesis development.

- b. Contact: Administrative Research Coordinator

3. Proposal Development

- a. Available for investigators who seek to develop a proposal for review by the STEPS Research Committee. The submission of a formal application to the STEPS Research Committee is **mandatory** in order to conduct research in STEPS.
- b. Must be sent to Administrative Research Coordinator at least 10 days prior to next committee meeting in order to be on agenda, or else it will be slotted for the following meeting.
- c. Please see the Research Committee SOP for further information regarding the formal application.
- d. Contact: Administrative Research Coordinator

4. STEPS Research Mentor Placement*

- a. Mentors will provide support and accountability to principle investigators. They can assist with appropriately articulating research questions, design, hypothesis and objectives, as well as providing recommendations for methodology and implementation.
- b. Contact: Assistant Director of Education and Assessment

5. Mandatory Pre-Review Meeting*

- a. The administrative research coordinator, simulation specialist, mentor and PI of project will meet to review the proposal.
- b. A review of the project's research design, surveys and assessment tools will be provided to finalize the proposal before submission to the research committee
- c. Contact: Administrative Research Coordinator

6. STEPS Research Committee Review*

- a. This interdisciplinary group monitors the educational research conducted in STEPS in order to assure compliance with IRB policies and promote

high-quality research. The committee also provides assistance with establishing a timeline for project completion.

- b. At least one member from the research team proposal (preferably the principle investigator) **must** be in attendance at the Research Committee Review in order to present the team's proposal and answer any committee questions.
- c. For more information, please see the Research Committee SOP for further information regarding the committee.
- d. Contact: STEPS Medical Director

7. IRB Approval Notification

- a. Upon Research Committee review of the proposal, the principle investigator will receive an update regarding the status of their proposal. Should there be any revisions requested from the committee, the research team will have until the next scheduled committee meeting to conduct changes and submit for final review.
- b. Once a proposal has been reviewed and approved, investigators will be sent an official approval letter from the committee, providing the investigators with brief next steps, as well as a STEPS research number to be used when referencing their project in the future.
- c. Please see Appendix B for a template approval letter.
- d. Contact: Administrative Research Coordinator

Post-IRB Approval –

8. Pre-Implementation Team Meeting*

- a. The purpose of this meeting is to finalize the implementation plan for the project, and organize the equipment and/or rooms needed for the project, as detailed in steps 9-10 above.
- b. It is recommended that investigators schedule a time that includes their STEPS research mentor and the principle investigator, as well as necessary STEPS research team members, such as a simulation specialist, assistant director of education and evaluation and the learning space specialist.
- c. Contact: Administrative Research Coordinator

9. Materials and/or Other Simulation-Related Requests*

- a. The materials needed for your simulation or any special items for your event will be addressed on the request form located on the STEPS Website (www.hsc.wvu.edu/STEPS) noted above in step 8.
- b. Contact: STEPS Scheduler

10. Simulation Scheduling Requests*

- a. To schedule a simulation you must fill out the request form located on the STEPS website (www.hsc.wvu.edu/STEPS).
- b. Select “Schedule” at the bottom of the page – This will take you to the instruction page, which will provide directions as to which log-in you should use to complete the form.
- c. Once complete, select “Schedule Event” – This will advance you to the formal event request form. Complete the form, and submit request for approval of event and date.
- d. Contact: STEPS Scheduler

11. Project Implementation*

- a. Upon steps 8-10 being completed, investigators may implement and conduct their research project at STEPS.
- b. Contact: Administrative Research Coordinator

12. Post-Implementation Follow-Up*

- a. Investigators are expected to provide semi-annual updates, 6 months from initial approval date, regarding project progression.
- b. Follow-up can be conducted in the form of a team meeting, with the STEPS Research Coordinator present, or by having the principle investigator attend the monthly Research Committee meeting that same month. This must be scheduled with the Research Coordinator at least 10 days prior to the next Committee meeting.
- c. Contact: Administrative Research Coordinator

13. Annual Re-Approval*

- a. Principle investigators are expected to provide an annual update, every 12 months from initial approval date, to the STEPS Research Committee. The principle investigator is expected to attend the monthly Research Committee meeting during that month in order to provide a brief summary of the project's progression in the past 12 months.
- b. If requested by the principle investigator, and upon satisfaction from the Research Committee, the investigator will be granted a 12 month renewal for the research project.
- c. Contact: Administrative Research Coordinator

14. Data Analysis

- a. The researcher can contact a statistician through the iLab system in the WV Clinical Translational Sciences Institute (CTSI).
- b. Other respective schools within the Health Sciences Center may have a statistician or other resources within their department to assist with this need.
- c. Contact: Administrative Research Coordinator

15. Abstract & Presentation Development

- a. STEPS center has personnel that are able to assist in the development and editing of abstracts for submission to regional, national, and/or international conferences.
- b. Upon acceptance to the conference, STEPS can also assist in presentation development, including electronic and/or printed posters, or oral presentations.
- c. It is recommended that the principle investigator, or the presenting member of the research team, practice their presentation in a monthly Research Committee meeting. The purpose of this practice presentation is to provide presenter's with appropriate feedback.
- d. Contact: Administrative Research Coordinator

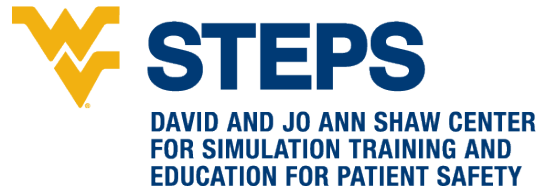
16. Manuscript Development

- a. STEPS center has personnel that are able to assist in the development and editing of manuscripts for submission to peer-reviewed journals.

- b. STEPS can assist in the submission process to the journal of the investigators choosing, as well as the revisions and re-submission process.
- c. It is an expectation of the principle investigator to submit any manuscripts published in peer-reviewed journals to the Research Committee for their records.
- d. Contact: Administrative Research Coordinator

17. Closing Procedure for Projects

- a. Upon completion of the research project, the principle investigator is expected to notify STEPS of any publications and presentations that were a product of the research conducted in STEPS, as noted in steps 15-16.
- b. To provide formal notification, email the Administrative Research Coordinator with the specific details of the conference where the project was presented, and the peer-reviewed journal where the research was published. Attach electronic copies of presentations and/or publications with the formal citations.



Policy: RE02
Adopted: April 19, 2019
Reviewed/Revised: April 19, 2019
Author: Russell Doerr, Amy Summers
Approver: Daniel Summers

Appendix A: Research Process Contact

Administrative Research Coordinator:

Amy Summers [Contact Information: amy.summers1@hsc.wvu.edu (304) 293-7596]

Assistant Director of Education and Assessment:

Lee ann Miller [Contact Information: lamiller@hsc.wvu.edu (304) 293-5533]

Medical Director:

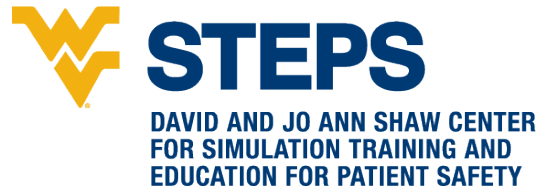
Dorian Williams, MD [Contact Information: dorian.williams@hsc.wvu.edu (304) 293-5234]

STEPS Scheduler:

Leigh Ann Bean [Contact Information: leighann.bean@hsc.wvu.edu (304) 293 -2665]

Simulation Specialist:

Rusty Doerr [Contact Information: rdoerr@hsc.wvu.edu (304) 293 –1703]



Policy: RE02
Adopted: April 19, 2019
Reviewed/Revised: April 19, 2019
Author: Russell Doerr, Amy Summers
Approver: Daniel Summers

Appendix B: Template STEPS Research Committee Approval Letter.

<Date>

<Faculty>
West Virginia University

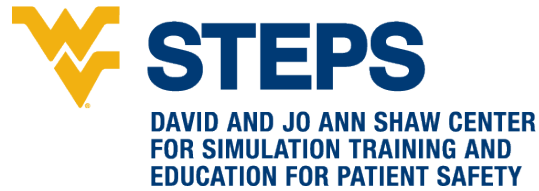
Dear <faculty>

This letter is to confirm that the project you submitted titled < title > was discussed at our <date> Research Meeting. The proposal was determined to meet criteria for approval by the committee under our IRB Protocol #1304035754. Your project number is < > please use this when referencing your project going forward. This project meets the guidelines set forth and has been approved.

Congratulations, we look forward to hearing the results of the study.

Kind Regards,

Amy Summers
Administrative Research Coordinator
STEPS – David and Jo Ann Shaw Simulation Training and Education for Patient Safety
(304) 293-7596



Policy: RE02
Adopted: April 19, 2019
Reviewed/Revised: April 19, 2019
Author: Russell Doerr, Amy Summers
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Russell Doerr & Amy Summers
Author

April 19, 2019
Date

X Daniel Summers
Approver

April 19, 2019
Date

Policy: RE02
Adopted: April 19, 2019
Reviewed/Revised: April 19, 2019
Author: Russell Doerr, Amy Summers
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	April 19, 2019

Automated External Defibrillator

Purpose:

To ensure proper storage, display, maintenance, availability, and usage of STEPS owned Automated External Defibrillators.

Scope:

For storage, display, maintenance, and availability, all persons employed by STEPS, and especially the designated employee. For usage, all persons in or near the STEPS facility that would have a need for an AED in the event of an emergency.

Responsibilities:

For storage, display, maintenance, and availability, all persons employed by STEPS, and especially the designated employee. Ultimately, the STEPS Director. For usage, the individual using the AED is responsible for its operation.

Definitions: None required for this policy.

Procedures:

- All AED's will be properly registered with University Security as well as the County Emergency Response System/911.
- All AED's will be stored in a designated cabinet, made for the purpose, and located in clearly visible, high traffic areas. Cabinets will be clearly marked, with 3-dimensional signage placed above the cabinet. AED's will be inspected monthly for mechanical issues and to ensure disposable equipment has not reached its expiration date. AED cabinets will be unlocked, but will be equipped

with an audible alarm when opened. Usage of the AED will be in accordance with manufacturer's guidelines as well as current guidelines as published by the American Heart Association, including activating the Emergency Response System. While not required, it is encouraged that all persons undergo training in cardiopulmonary resuscitation.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X **Jason Craig**
Author

July 23, 2018
Date

X **Daniel Summers**
Approver

July 23, 2018
Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	March 20, 2017
2.0	New Policy Format	July 23, 2018

Emergencies

Purpose:

To promote an orderly and safe response to emergency situations in the facility.

Scope:

All persons within the center.

Responsibilities:

STEPS Director and all persons using the STEPS Simulation Center.

Definitions: None required for this policy.

Procedures:

- Whereas it is impossible to account for all types of emergencies within a single policy, the intent of this policy is to issue guidance on the general concepts of responding to any general emergency. As with all aspects of this policy manual, the overall policies written and approved by the WVU Health Sciences Center Administration, and West Virginia University overall supersede those written here in the event of a conflict.
- Should an emergency arise in the center, notify those around you that an emergency exists and, if appropriate, evacuate to a safe location. Should there be a greater danger in leaving your present location, it is permissible to shelter in place. If it is safe for you to do so, assist those with difficulty mobilizing to do the same. Never place yourself in danger to stay behind and help.

Policy: SA02
Adopted: February 24, 2017
Reviewed/Revised: July 23, 2018
Author: Jason Craig
Approver: Daniel Summers

- From a safe location, activate the emergency response system, and request the appropriate assistance.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Jason Craig

Author

July 23, 2018

Date

X Daniel Summers

Approver

July 23, 2018

Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	February 24, 2017
2.0	New Policy Format	July 23, 2018

Fire Alarm

Purpose:

To promote an orderly and safe response to a fire or fire alarm activation in the facility.

Scope:

All persons within the center.

Responsibilities:

STEPS Director and all persons using the STEPS Simulation Center.

Definitions: None required for this policy.

Procedures:

As with all aspects of this policy manual, the overall policies written and approved by the WVU Health Sciences Center Administration, and West Virginia University overall supersede those written here in the event of a conflict.

Should the fire alarm activate in the center, ensure that those around you heard the alarm as well and proceed to evacuate the building, following the prescribed exit path posted in your area. Should there be a greater danger in following that route, take an alternative one. If it is safe for you to do so, assist those with difficulty mobilizing to do the same. Never place yourself in danger to stay behind and help.

Do not attempt to re-enter the building until authorized to do so.

Should you be present when a small fire occurs, notify those around you of a fire. Have someone pull the fire alarm and/or activate the emergency response system. If you

believe the fire is small enough to be extinguished with a fire extinguisher, you may attempt to do so if you have been trained in its use. Use the fire extinguisher using the PASS method:

P: Pull – Pull the safety Pin

A: Aim – Aim the nozzle at the base of the fire.

S: Squeeze – Squeeze the lever to discharge the extinguishing product.

S. Sweep – Sweep the nozzle back and forth at the base of the fire.

If you believe the fire is too large to be extinguished by an extinguisher, safely evacuate with the rest of the personnel.

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Jason Craig

Author

July 23, 2018

Date

X Daniel Summers

Approver

July 23, 2018

Date

Chronological Revision History

Version	Modification	Date
1.0	New SOP	February 24, 2017
2.0	New Policy Format	July 23, 2018

Standardized Patient Conduct

Purpose:

The purpose of this policy is to outline the expectations of the program for maintaining a quality atmosphere for our learners.

Scope:

All SPs, GTA, and MUTAs are expected to adhere to the following at all times present in STEPS for learning activities.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **ADEE is responsible for evaluating SP conduct**
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)
 - **Medical Director or designee**
 - **Director or designee**
 - **Other**

Definitions:

Term or Acronym/Abbreviation	Definition
SP	Standardized Patient
GTA	Gynecological Teaching Assistant
MUTA	Male Urogenital Teaching Assistant
ADEE	Assistant Director Education & Evaluation

Procedures:

SP Realism:

- Do not speak with students “out of role” before or during the simulation—you should not be seen by any of the students unless you are “in role.”
- At end of encounter complete checklist and feedback form using checklist and feedback guide.
- Please do not walk in the hall or chat at the door between sessions.

Assessment:

- Check over each checklist/form for completeness
- Feedback forms must be given to the staff after the session and at the lunch break during the CPX.

Teaching Sessions:

- For small group sessions (i.e., clinical group for MS I) talk with the facilitator before or after the session in the hallway to discuss items on checklist/do not conduct this business in front of the student group.

Confidentiality:

- **Student Confidentiality** No student performance is to be discussed with anyone by name or identifying specifics other than with SP program staff and Health Science Center (HSC) faculty. We must maintain total privacy for our students at all times.
- **SP/GTA/MUTA Confidentiality** Any observations of any SP or GTA performance during training or teaching sessions are to be kept in the strictest confidence. I will not discuss SP/GTA performance other than with the SP program staff and HSC faculty.
- **Confidential Materials** The cases/checklists/forms used for in the SP program are the property of West Virginia University School of Medicine. These cases/checklist/forms are to be used by SP and SP program staff for assigned events only. Do not leave your confidential materials (cases/checklists/instructions) or any other material in the exam rooms. Give these to the proctor or SP educator at end of encounter.

Professionalism:

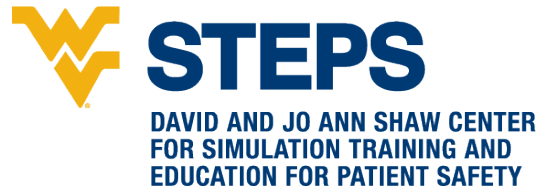
- **Preparation** It is your professional obligation to come to the encounter/exam/session prepared. This includes knowing the details of the case and case checklist, suitable/clean attire, and appropriate hygiene.
- **Availability** You must be available for full time requested.
- **Punctuality** It is recommended that you arrive for your encounter at least 15 minutes prior to the start.
- **Cell phones:** Please be sure to silence your cell phones before a student encounter. We ask that you do NOT answer calls or texts while a student is in the room. You may, however, use phones between sessions as long as neighboring students are not disturbed.

Attire:

- **History & Physical** Men should wear only a gown and shorts. Women should wear a gown, shorts, and either a sports bra or tank top. If you get chilly, you can bring a wrap blanket or sweater.
 - **Ultrasound** Men should wear only a gown and loose fitting shorts. Women should wear a gown, loose fitting shorts, and either a sports bra or tank top.

References:

WVU P&P for SP Program



Policy: ST01
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Lee Ann Miller

Author

July 23, 2018

Date

X Daniel Summers

Approver

July 23, 2018

Date

Policy: ST01
 Adopted: May 2, 2017
 Reviewed/Revised: July 23, 2018
 Author: Lee Ann Miller
 Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	12/14/2016
1.1	The SOP template was updated	12/18/2017
1.2	SOP template was updated, Author signature line re- inserted	1/29/2018
2.0	Updated to common STEPS format policy	7/19/2018

Standardized Patient Onboarding

Purpose:

The purpose of this policy is to outline the procedure for hiring and initiating new Standardized Patients.

Scope:

All SPs, GTA, and MUTAs must complete the process prior to their first paid encounter.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **ADEE is responsible for interviewing and onboarding**
 - **Medical director will provide examination to GTA or MUTA who do not have a primary care physician.**
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)
 - **Medical Director or designee**
 - **Director or designee**
 - **Other**

Definitions:

Term or Acronym/Abbreviation	Definition
SP	Standardized Patient
GTA	Gynecological Teaching Assistant
MUTA	Male Urogenital Teaching Assistant
ADEE	Assistant Director Education & Evaluation

Procedures:

Most SPs are recruited by word of mouth. In addition, GTA and MUTA are recruited by signage or social media. Successful SP/GTAs must:

- Be comfortable with their health and dealing with health professionals.
- Be willing to be videotaped for educational purposes.
- Not have any biases against anyone based on their gender, race, religion, national origin, physical characteristics, etc.
- Be reliable and punctual to scheduled events.
- Keep all case information confidential.

- Repeatedly portray a patient case with accuracy as trained by WVU faculty or staff.
- Remember what the student who examined you did and then record it on a checklist.
- Have strong written and verbal communication skills.
- Want to contribute to the training process of excellent physicians.

Interested individuals will complete an online application

<http://www.hsc.wvu.edu/steps/programs/standardized-patient-program/sp-application/>

and speak with ADEE on the phone or in person. If the program has openings for new patients, a group training orientation will be scheduled (typically once per year). Upon successful completion of training orientation, the individual will complete an SP Consent form, an official W9 for payment, and an online video/photo release before being scheduled for an event.

References:

WVU P&P for SP Program

Policy: ST02
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Lee Ann Miller

Author

July 23, 2018

Date

Daniel Summers

Approver

July 23, 2018

Date

Policy: ST02
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	May 2, 2017
2.0	Updated to common STEPS format policy	July 19, 2018

Standardized Patient Payment

Purpose:

The purpose of this policy is to outline the pay schedule for our independent contractors.

Scope:

All SPs, GTA, and MUTAs are paid by the following rule.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **SP is responsible for checking in and out for each event**
 - **ADEE is responsible for submitting electronic timesheets for payment**
 - **Administrative Associate is responsible for submitting pay requisition to wvuh**
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)

- **Medical Director or designee**
- **Director or designee**
- **Other**

Definitions:

Term or Acronym/Abbreviation	Definition
SP	Standardized Patient
GTA	Gynecological Teaching Assistant
MUTA	Male Urogenital Teaching Assistant
ADEE	Assistant Director Education & Evaluation

Procedures:

Payment is processed every two weeks. Checks are distributed by WVUHealthcare and mailed via USPS directly to the address provided on your W9. Please allow up to 30 days after an encounter to receive payment.

Standardized Patients are paid a flat rate of:

\$15.00 an hour for training (payable at the time of first scheduled encounter)

\$20.00 an hour for the encounter

Gynecological Teaching Associates (GTAs) and Male Urogenital Teaching Associates (MUTAs) are paid:

\$100.00 flat rate upon successful completion of training

\$150.00 per GTA session (90 minute maximum; 4 students)

\$200.00 per SANE session (up to 3 hours of SP/GTA script; 4 students)

\$25 per additional student

All SP and subsequent GTA/MUTA training events are paid \$15 per hour

All SPs, GTAs, MUTAs, who conduct training events are paid \$20 per hour

In the event that:

- a. SP shows up unscheduled - no pay
- b. SP shows up erroneously scheduled - pay for time requested
- c. SP shows up scheduled but not needed – pay for time requested
- d. SP participates but sent home early – pay for time requested
- e. SP on standby – no pay
- f. Minimum advance notice without pay – anytime the day before

References:

WVU P&P for SP Program

Policy: ST03
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Lee Ann Miller

Author

July 23, 2018

Date

Daniel Summers

Approver

July 23, 2018

Date

Policy: ST03
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	May 2, 2017
2.0	Updated to common STEPS format policy	July 23, 2018

Standardized Patient Quality Assurance

Purpose:

The purpose of this policy is to outline the expectations of the program for maintaining accuracy and accountability among our SPs.

Scope:

All SPs, GTA, and MUTAs are subject to frequent quality assurance.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **ADEE is responsible for identifying QA/QI activities**
- **3.1.2 Research Assistant is responsibility for conducting QA/QI methods**
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)
 - **Medical Director or designee**
 - **Director or designee**
 - **Other**

Definitions:

Term or Acronym/Abbreviation	Definition
SP	Standardized Patient
GTA	Gynecological Teaching Assistant
MUTA	Male Urogenital Teaching Assistant
ADEE	Assistant Director Education & Evaluation

Procedures:

Quality assurance is maintained using several methods:

- Student/preceptor evaluations
- Direct/scheduled/random observation during training and during sessions
- Videotape review by staff or peer
- Periodic check in or inservice

Feedback to individuals is in a timely manner by email or phone call.

When necessary, remediation is provided by verbal or written instruction followed by replication of the session, and observation checkoff.

References:

WVU P&P for SP Program

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Lee Ann Miller

Author

July 23, 2018

Date

X Daniel Summers

Approver

July 23, 2018

Date

Policy: ST04
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	May 2, 2017
2.0	Updated to common STEPS format policy	July 23, 2018

Standardized Patient Scheduling

Purpose:

The purpose of this policy is to outline the pay schedule for our independent contractors.

Scope:

All SPs, GTA, and MUTAs are scheduled by the following rule.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **ADEE is responsible for selecting potential SPs for calendar events**
 - **Scheduler is responsible for contacting SP for events and dealing with cancellations**
 - **SP is responsible for providing availability response in a timely manner**
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)

- **Medical Director or designee**
- **Director or designee**
- Other

Definitions:

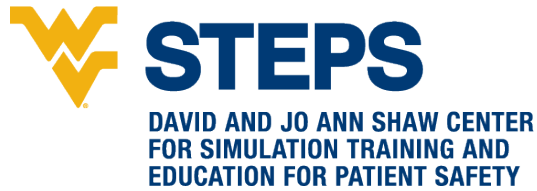
Term or Acronym/Abbreviation	Definition
SP	Standardized Patient
GTA	Gynecological Teaching Assistant
MUTA	Male Urogenital Teaching Assistant
ADEE	Assistant Director Education & Evaluation

Procedures:

The STEPS calendar dictates days and times for SP encounters. The frequency of individual scheduling depends upon experience, reliability, and patient demographic.

Prior to each encounter SPs receive a list of dates for which they could potentially be scheduled. They are asked to indicate which dates/times you are available and subsequently contacted with a finalized schedule and reminded (when possible) a few days before the event.

In the event of circumstances that prevent an SP coming to a scheduled session, SP will notify program staff as soon as possible. STEPS staff will schedule a replacement. A pattern of last minute cancellations may impact selection for future events.



Policy: ST05
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

In the event of inclement weather, all WVU SP encounters will take place as scheduled UNLESS the University is closed.

References:

WVU P&P for SP Program

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

X Lee Ann Miller
Author

July 23, 2018
Date

X Daniel Summers
Approver

July 23, 2018
Date

Policy: ST05
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	May 2, 2017
2.0	Updated to common STEPS format policy	July 23, 2018

Standardized Patient Training

Purpose:

The purpose of this policy is to outline the training program for maintaining accuracy and accountability among our SPs.

Scope:

All SPs, GTA, and MUTAs must complete training for each event they attend.

Responsibilities:

- **WVU STEPS Group or Employee** (Specific roles and responsibilities for employees or groups of employees)
 - **ADEE is responsible for training SPs**
 - **GTA Trainer is responsible for keeping GTAs up to date**
 - **MUTA Trainer is responsible for keeping MUTAs up to date**
- Medical Director assesses...
- **Employee Responsibilities**
- Specific roles and responsibilities for employees if groups of employees are identified above. (examples are as follows)

- **Medical Director or designee**
- **Director or designee**
- **Other**

Definitions:

Term or Acronym/Abbreviation	Definition
SP	Standardized Patient
GTA	Gynecological Teaching Assistant
MUTA	Male Urogenital Teaching Assistant
ADEE	Assistant Director Education & Evaluation

Procedures:

All cases/checklists and training materials are developed and created by SP program staff/HSC faculty and are the property of West Virginia University Health Science Center. These cases/checklist and all training materials are to be used exclusively by SP/GTAs in the SP program. Upon resignation, all cases, checklists and any training materials are to be returned to SP program in the Health Science Center.

The program recognizes the various learning styles of the SP/GTAs. If an individual SP/GTA develops materials that assist them in learning the cases/checklist and feels it would aid SP/GTAs in training, they must submit the materials to the SP program staff.

Please do not distribute any materials without prior review by the SP educator.

Basic SP Training procedures:

- Initial training session to discuss case, checklist, and feedback options
- Home study
- Additional training of physical examination techniques (event/case specific)
- Dry run the case/checklist/reliability (it is expected the SP arrives for the dry run prepared to portray the case with detailed knowledge of case/checklist/feedback)

Basic GTA/MUTA Training procedures:

- Observe a GTA/MUTA session
- Physical Examination conducted by a physician or Nurse Practitioner
- GTA/MUTA curricula
- Home study
- Hands-on examination practice

Mandatory update training/observation as required for participation

References:

WVU P&P for SP Program

Policy: ST06
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Approval to Issue: Please sign and date in spaces provided below to indicate your approval for issuance of this SOP.

Lee Ann Miller

Author

July 23, 2018

Date

Daniel Summers

Approver

July 23, 2018

Date

Policy: ST06
Adopted: May 2, 2017
Reviewed/Revised: July 23, 2018
Author: Lee Ann Miller
Approver: Daniel Summers

Chronological Revision History

Version	Modification	Date
1.0	New SOP	May 2, 2017
2.0	Updated to common STEPS format policy	July 23, 2018

Policy on Incidental Findings by Learners - June 2017

Our learners and equipment are not vetted for providing health care. Exams incurred are not intended to be diagnostic. We recommend any findings to be reported to the patient's primary care provider. STEPS has no financial responsibility for subsequent medical care. If abnormalities are found, the following information must be documented and stored in a private folder on the H: drive.

Patient name _____

Finding _____

When identified _____

Identified by whom _____

Reviewed by whom _____

Recommendations: **Follow up with your primary care physician** _____

Signed by physician or instructor _____ Date: _____