

**DRAFT**

# **Special Topics in Instruction and Assessment with Standardized Patients**

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**Course Syllabus**

**April 23-24, 2018**

**Instructors**

**Rachel Yudkowsky, MD, MHPE**

**Robert Kiser**

**Laura McKenzie**

**Shole Milos**

Dr Allan L and Mary L Graham Clinical Performance Center

Department of Medical Education  
University of Illinois at Chicago College of Medicine

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**Course objectives:**

This course provides the basic knowledge and skills necessary for faculty and staff who design and implement standardized patient (SP) based instruction and assessment programs in health professions education settings.

*At end of this course, you will be better able to*

1. Teach and assess physical exam skills, communication skills and clinical reasoning with SPs
2. Leverage unannounced or incognito SPs (mystery shoppers) for research, assessment and quality assurance
3. Set defensible pass/fail standards for SP-based exams
4. Design quality assurance programs for SP-based exams

**Schedule:** 9:00 am-4:00 pm daily; light breakfast and lunch included

**Location:**

University of Illinois at Chicago College of Medicine  
Department of Medical Education  
Room 988 CMET (College of Medicine East Tower)  
808 S Wood Street, Chicago IL 60612

**Certificate of Completion:** To obtain a certificate of completion you must attend both days of the program.

***Monday 9:00-10:30***

**Promoting and Assessing Clinical Reasoning through  
Standardized Patient Encounters**

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**Objectives:** *At the end of this session, participants should be able to:*

- Evaluate how assessments can either encourage or discourage the development of clinical reasoning skills
- Develop SP checklist items that promote clinical reasoning
- Utilize a scoring rubric to assess clinical reasoning in the context of post-encounter patient notes

***Monday 10:30-12:00***

**Teaching and Assessing Physical Exam Skills with SPs**

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**Objectives:** *At the end of this session, participants should be able to:*

- Analyze the strengths and weaknesses of a Head-to-Toe approach to teaching and assessing physical exam (PE) skills
- Compare the Head-to-Toe approach to a Hypothesis-Driven or Core+Clusters approach
- Utilize effective strategies for teaching SPs to accurately assess PE skills

***Monday 1:00-2:30***

**Teaching and Assessing Communication Skills with SPs**

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**Objectives:** *At the end of this session, participants should be able to:*

- Identify strategies for teaching communication skills in small groups and in 1:1 encounters
- Evaluate a communication-focused OSCE
- Compare different approaches to rating communication skills
- Analyze methods for training SPs to rate communication skills

*Monday 2:45-4:00*

## **Utilizing Unannounced or Incognito SPs**

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**Objectives:** *At the end of this session, participants should be able to:*

- Analyze the benefits of using Unannounced SPs (USPs) to assess performance for quality assurance and research
- Evaluate ethical issues involved in utilizing USPs
- Identify strategies to effectively train and deploy USPs

*Tuesday 9:00-12:00*

## **Setting Defensible Pass/Fail Standards for SP Exams**

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**Objectives:** *At the end of this session, participants should be able to:*

- Analyze standard-setting challenges for local SP assessments
- Conduct Angoff, Borderline Group and Hofstee standard setting exercises with your own faculty
- Compare compensatory and conjunctive approaches to setting standards for multi-station exams (OSCEs)

*Tuesday 1:00-4:00*

## **Designing Quality Assurance Programs for SP Assessments**

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**Objectives:** *At the end of this session, participants should be able to:*

- Select quality assurance methods and metrics for your SP based assessment
- Collect evidence to support the validity of your assessment
- Identify measures to maximize the validity of SP-based assessments in your own institution

## Course Faculty:



**Rachel Yudkowsky MD MHPE** is the Director of the Dr Allen L and Mary L Graham Clinical Performance Center and Associate Professor in the Department of Medical Education at the University of Illinois at Chicago. Rachel served as Chair of the Research and Grants Committee of the Association of Standardized Patient Educators (ASPE) from 2007-2009, and is an Associate Editor of the Journal *Simulation in Healthcare*. Areas of research interest include performance assessment using standardized patients and other simulations, and setting passing standards for performance exams.

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**Bob Kiser** is the Associate Director of the Graham CPC, in charge of day-to-day operations for both patient-based and technical simulation programs. Bob has joined his team nationally and internationally in facilitating workshops on the use and training of SPs. Two areas of interest are the use of SPs in telemedicine instruction and SP feedback. Bob is both a certified mediator and an executive coach.

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**Laura McKenzie** is the Assistant Director at the Graham CPC. Laura helped develop a course for second-year medical students using acting to teach empathy; she has also worked with the American Board of Psychiatry and Neurology to create a series of videos for testing purposes. Laura is also an actor, writer and musician. She currently performs with Barrel of Monkeys and other theater companies in Chicago.

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**Shole Milos** has served as Standardized Patient Coordinator since 2007, after spending many years working as a Standardized Patient focusing on physical exam technique and basic skills instruction. He is a graduate of Loyola University with a degree in Theatre and Communications with a focus on children's theatre education and children's theatre production.

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## Course Schedule

*For optional readings, see reading list below*

	<b>Monday April 23, 2018</b>	<b>Tuesday April 24, 2018</b>
8:45 am – 9:00 am	Breakfast	Breakfast
9:00 am – 10:30 am	<ul style="list-style-type: none"> <li>- Introductions</li> <li>- Promoting and assessing clinical reasoning through SP encounters</li> </ul> <p><i>Activity: Participate in a patient note scoring calibration exercise</i></p> <p><i>(Suggested reading: Park 2013)</i></p>	<ul style="list-style-type: none"> <li>- Setting defensible pass/fail standards for SP-based exams</li> </ul> <p><i>(Suggested reading: Downing 2006)</i></p>
10:30 am – 10:45 am	Break	Break
10:45 am – 12:00 pm	<ul style="list-style-type: none"> <li>- Teaching and assessing physical exam skills with SPs</li> </ul> <p><i>(Suggested reading: Yudkowsky 2009)</i></p>	<i>Activity: Set standards using Angoff and Hofstee methods</i>
12:00 pm – 1:00 pm	Lunch	Lunch
1:00 pm – 2:30 pm	<ul style="list-style-type: none"> <li>- Teaching and assessing communication skills with SPs</li> </ul> <p><i>Activity: Participate in frame-of-reference training for rating communication skills</i></p>	<ul style="list-style-type: none"> <li>- Designing quality assurance programs for SP-based exams</li> <li>- Gathering and reporting validity evidence for an OSCE</li> </ul> <p><i>(Suggested reading: Yudkowsky Performance Tests in AHPE)</i></p>
2:30 pm – 2:45 pm	Break	Break
2:45 pm – 4:00 pm	<ul style="list-style-type: none"> <li>-Utilizing unannounced or incognito SPs (mystery shoppers)</li> </ul> <p><i>(Suggested reading: Rethans 2007)</i></p>	<p><i>Activity: Design a QA program to provide validity evidence for your OSCE</i></p> <ul style="list-style-type: none"> <li>- Questions/ Wrap up</li> <li>- Course evaluation</li> </ul>

## Bibliography and Recommended Reading

### Assessment with SPs - General

- Adamo G: Simulated and standardized patients in OSCEs: achievements and challenges 1992-2003. *Medical Teacher*, 2003; 25 (3): 262-270.
- Colliver JA, Williams RG: Technical issues: test application. *Academic Medicine*, 1993; 68 (6): 454-463.
- Gorter S, Rethans JJ, Scherpbier A, van der Heijde D, van der Vleuten C, van der Linden S: Developing case-specific checklists for standardized-patient-based assessments internal medicine: A review of the literature. *Academic Medicine*, 2000; 75 (11): 1130-1137.
- Norcini J, Boulet J: Methodological issues in the use of standardized patients for assessment. *Teaching and Learning in Medicine*, 2003; 15 (4): 293-297.
- Yudkowsky R: Performance Tests. In Downing SM and Yudkowsky R (eds): Assessment in Health Professions Education, New York and London: Routledge 2009

### Assessing Physical Exam Skills

- Yudkowsky R, Downing S, Klamen D, Valaski M, Eulenberg B, Popa M: Assessing the Head-To-Toe Physical Examinations Skills of Medical Students. *Medical Teacher* 2004, 26(5):415-419
- \*Yudkowsky R, Otaki J, Lowenstein T, Riddle J, Nishigori H, Bordage G: A Hypothesis-Driven Physical Exam for Medical Students: Initial Validity Evidence. *Med Educ* 2009; 43:729-740
- Nishigori H, Masuda K, Kikukawa M, Kawashima A, Yudkowsky R, Bordage G, Otaki J: A Model Teaching Session for the Hypothesis-Driven Physical Examination. *Medical Teacher*, 2011; 33(5): 410-417

### Assessing Clinical Reasoning in Checklists and the Patient Note

- Park YS, Hyderi A, Bordage G, Xing K, Yudkowsky R: Inter-rater Reliability and Generalizability of Patient Note Scores Using a Scoring Rubric Based on the USMLE Step-2 CS Format. *Advances in Health Sciences Education*, 2016; 21(4):761-773.
- Yudkowsky R, Park YS, Hyderi A, Bordage G: Characteristics and Implications of Diagnostic Justification Scores Based on the New Patient Note Format of the USMLE Step 2 CS Exam. *Academic Medicine* 2015; 90:S56-S62
- \*Park YS, Lineberry M, Hyderi A, Bordage G, Riddle J, Yudkowsky R: Validity Evidence for a Patient Note Scoring Rubric Based on the New Patient Note Format of the United States Medical Licensing Examination. *Academic Medicine* 2013; 88(10):1552-7

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- Yudkowsky R, Park YS, Riddle J, Palladino C, Bordage G: Clinically Discriminating Checklists Versus Thoroughness Checklists: Improving the Validity of Performance Test Scores. *Academic Medicine* 2014; 89(7):1057-62

### **Assessing Communication Skills**

- Yudkowsky R, Downing SM, Sandlow LJ: Developing an Institution-based Assessment of Resident Communication and Interpersonal Skills. *Acad Med*, 2006; 81: 1115-1122
- Yudkowsky R, Downing SM, Ommert D: Prior Experiences Associated with Residents' Scores on a Communication and Interpersonal Skill OSCE. *Patient Education and Counseling*, 2006; 62:368-373
- Iramaneerat C, Myford CM, Yudkowsky R, Lowenstein T: Evaluating the Effectiveness of Rating Instruments for a Communication Skills Assessment of Medical Residents. *Advances in Health Sciences Education* 2009; 14:575-594.

### **Unannounced Standardized Patients**

- Weiner SJ, Schwartz A, Weaver F, Goldberg J, **Yudkowsky R**, Sharma G, Binns-Calvey A, Preyss G, Schapira MM, Persell SD, Jacobs E, Abrams RI: Contextual Errors and Failures in Individualizing Patient Care: A Multicenter Study. *Ann Intern Med* 2010; 153:69-75.
- \*Rethans JJ, Gorter S, Bokken L, Morrison L: Unannounced Standardized Patients in Real Practice: A Systematic Literature Review. *Med Educ* 2007; 41:537-549

### **Standard Setting**

- \*Downing S, Tekian A, Yudkowsky R: Procedures for Establishing Defensible Absolute Passing Scores on Performance Examinations in Health Professions Education. *Teaching and Learning in Medicine* 2006; 18(1):50-57
- Yudkowsky R, Downing SM, Tekian A: Standard Setting. In Downing SM and Yudkowsky R (eds): Assessment in Health Professions Education, New York and London: Routledge 2009

### **Quality Assurance and Threats to Validity**

- Boulet, J.R., McKinley, D.W., Whelan, G.P. et al: Quality Assurance Methods for Performance-Based Assessments. *Adv Health Sci Educ Theory Pract* (2003) 8: 27-47
- \*Yudkowsky R: Performance Tests. In Downing SM and Yudkowsky R (eds): Assessment in Health Professions Education, New York and London: Routledge 2009



## Books

- Downing SM and Yudkowsky R (eds): Assessment in Health Professions Education, New York and London: Routledge 2009
- Nestel D, Bearman M (eds): Simulated Patient Methodology: Theory, Evidence and Practice, Wiley Blackwell 2014
- Zabar S, Kachur E, Kalet A, Hanley K (eds): Objective Structured Clinical Examinations: 10 steps to planning and implementing OSCEs and other standardized patient exercises. Springer 2013

## Other Resources:

*Association of Standardized Patient Educators* (ASPE): an international organization of health professions educators engaged in SP work. Holds an annual meeting in June of each year. Has a growing resource bank of materials on their website <http://www.aspeducators.org>

*Society for Simulation in Healthcare* (SSH) has an SP Special Interest Group, and SP programming during their annual meeting, the International Meeting on Simulation in Healthcare (IMSH), held in January of each year. [www.ssih.org](http://www.ssih.org)

*International Nursing Association for Clinical Simulation and Learning* (INACSL) is the nursing simulation organization. Annual meeting is in June. [www.inacsl.org](http://www.inacsl.org)

*SP Trainer Listserve*: a venue for discussion of SP-related issues and challenges, and for requesting and sharing resources. To subscribe or unsubscribe via the World Wide Web, visit <http://mailman13.u.washington.edu/mailman/listinfo/sp-trainer>

*Simulation in Healthcare* – the Journal of SSH, also an official journal of ASPE. Publishes articles on all types of simulations including SPs and multimodal simulation. <http://journals.lww.com/simulationinhealthcare>

*Clinical Simulation in Nursing* – the Journal of INACSL. <http://www.nursingsimulation.org/>

*BMC Advances in Simulation* – a new open-access (free) online journal with the goal of advancing the use of simulation in social and health care. <https://advancesinsimulation.biomedcentral.com/>

*MedEd Portal* – has SP cases and resource materials. [www.mededportal.org](http://www.mededportal.org)