

Simulated Patient Case Protocol:

Adapted by Dr. Laurence Biro

The following protocol is based on the Appendix 3 from *Teaching and Learning Communication Skills*¹. It is designed to be comprehensive -- not all cases will include all of the following details. Authors should complete those parts of the protocol that are relevant, depending on the nature of the case and the way in which the case is to be used.

Cover page

Case authors:

Date of original case:

Date of most recent revision:

Name of patient:

Learner's level of expertise:

What kind of case is this? (communication, PE, PE/Hx combination, ethics, etc.)

Anticipated length of case in minutes: (e.g. 5-minute station vs. 30-minute history)

Patient's problem(s):

Case objectives:

Key challenges:

Special casting requirements:

Most likely diagnosis:

Differential diagnosis:

Examination room set-up:

Data collection and marking notes: (e.g. simulated patient gives feedback, examiner does marking, video recorded, PE station included)

Instructions for actor

Current problem(s):

Communication challenge(s):

Age:

Setting:

Proximal biomedical perspective

- List of problems
- Sequence of events
- Details of symptoms or problems
- Related symptoms or issues
- Pertinent risk factors or protective factors

Distal biomedical perspective

Past Medical History

- *Any previous operations or hospitalizations?*
- *Any previous illnesses or other problems with your health?*

Medications including over the counter, herbal, oral contraceptive, etc

- Medications name, how many, how often, for how long, treatment for

Medical Family History

Smoking

EtOH

Proximal context

- Relationship status
- Sexual orientation
- Children
- Occupation, financial support
- Partner's occupation
- Where do you live
- Type of housing
- Transportation
- Social background
- Support network

Distal context

- Community, culture, power relationships, discrimination, media, geography, sociohistorical, etc...

Patient's perspective

- Ideas and thoughts
 - *What did you think have caused your problems?*
 - *What have they told you so far?*
- Concerns
 - *What are you concerned about?*
 - *Have you any underlying fears?*
 - *Any practical problems?*
- Expectations
 - *What are you hoping for?*
- Feelings
 - *How are you feeling about it all?*

For information-gathering station

How to present the symptom(s) or problem(s)

How to start the consultation:

- patient's exact words in response to interviewer's first open-ended question (e.g. 'Tell me why you have come to outpatients today')
- What to divulge to screening questions (e.g. 'So abdominal pain and fever — anything else?')

How to respond to specific types of questions or approaches: what to divulge spontaneously and what not to

- What patient says when asked subsequent open questions (e.g. 'Tell me what has been going on from the time this all first started to the present' or 'Tell me more about the pain ')
- What to divulge only to closed questions
- How to respond to emotional subjects and questions
- How to respond to questions about patient ideas, concerns and expectations about the problems

For an explanation and planning or other station

- Please specify how the patient should respond to the different possible opening comments by the candidate
- What questions, concerns or issues should the patient:
 - bring up spontaneously
 - only bring up if asked for his/her thoughts or questions or concerns
 - hint at or show only non-verbal cues
 - only mention if asked directly

Actor instructions (please be detailed)

- dress, mood, mannerisms, affect, attitude, temperament and behaviour
- how to respond to emotional subjects and questions
- how to respond to questions about patient fears, concerns and beliefs about the problems
- physical symptoms that need to be acted out (e.g. cough, hand tremor)

Physical findings e.g. character can only bend knee to 45-degree angle, raise arms past shoulder level, cannot feel vibrations from tuning on toes, etc.

Laboratory findings

Props

Post Encounter Probe

1. Kurtz S, Silverman J, Draper J. *Teaching and Learning Communications Skills in Medicine*. Vol Second Edi. London: Radcliffe Publishing; 2014.