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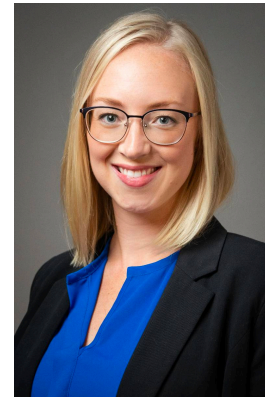# Disclosures

- EPPS - Textbook editor – no royalties

- EPPS - The Debriefing Academy - Faculty

- No financial interest or benefit from the products and platforms in this presentation.

Introductions

Chad Epps, MD, CHSE, FSSH
Executive Director- CHIPS

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Simulation Logistician

Jamie Pitt, MMHPE, BA
Assistant Director of SP Education

Jarrod Young, MBA, BSBME, CHSOS
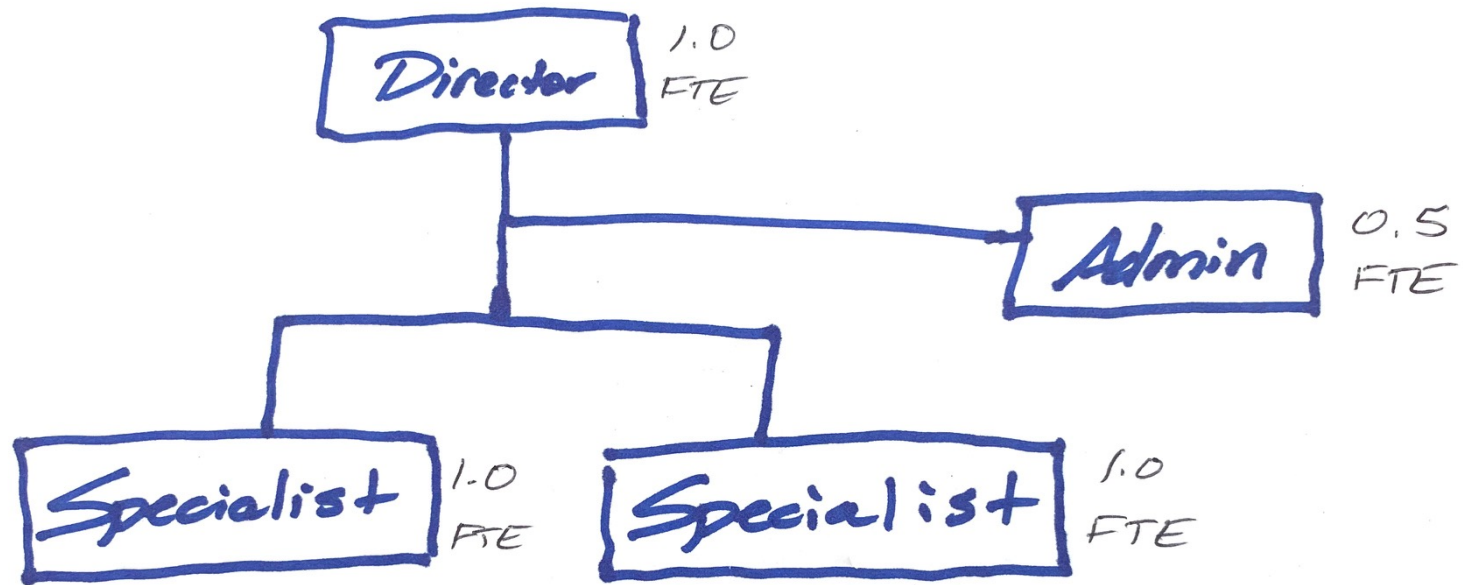Simulation Operations Lead

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Objectives

At the end of this session the participant will be able to:

- Discuss the role that policies and procedures play in implementing an event management process

- Identify strategies for workflow efficiencies

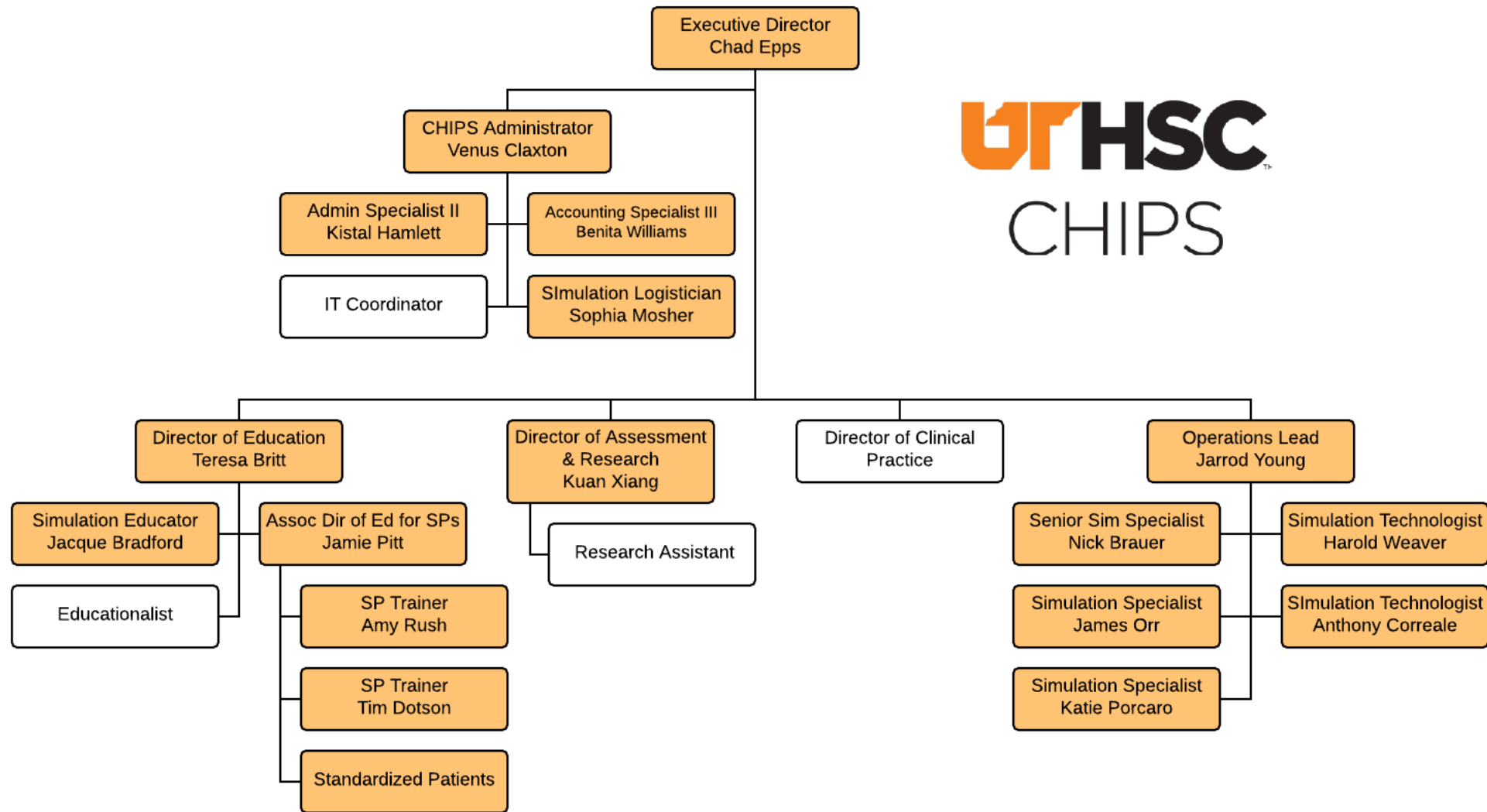- Identify tools and resources to assist in management of a simulation program

CHIPS Overview

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June 2016

Policy and Procedure

Policies For SSH Accreditation

- Confidentiality
  - Learner Performance
  - Scenario and Case Information

- Physical Safety

- Psychological Safety

- Separation of Supplies and Equipment

- Storage and Maintenance of Equipment and Supplies

- Video Recording

- Record and Data Retention

- Prioritization of Resources

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Workflow Efficiencies

Simulation Workflow
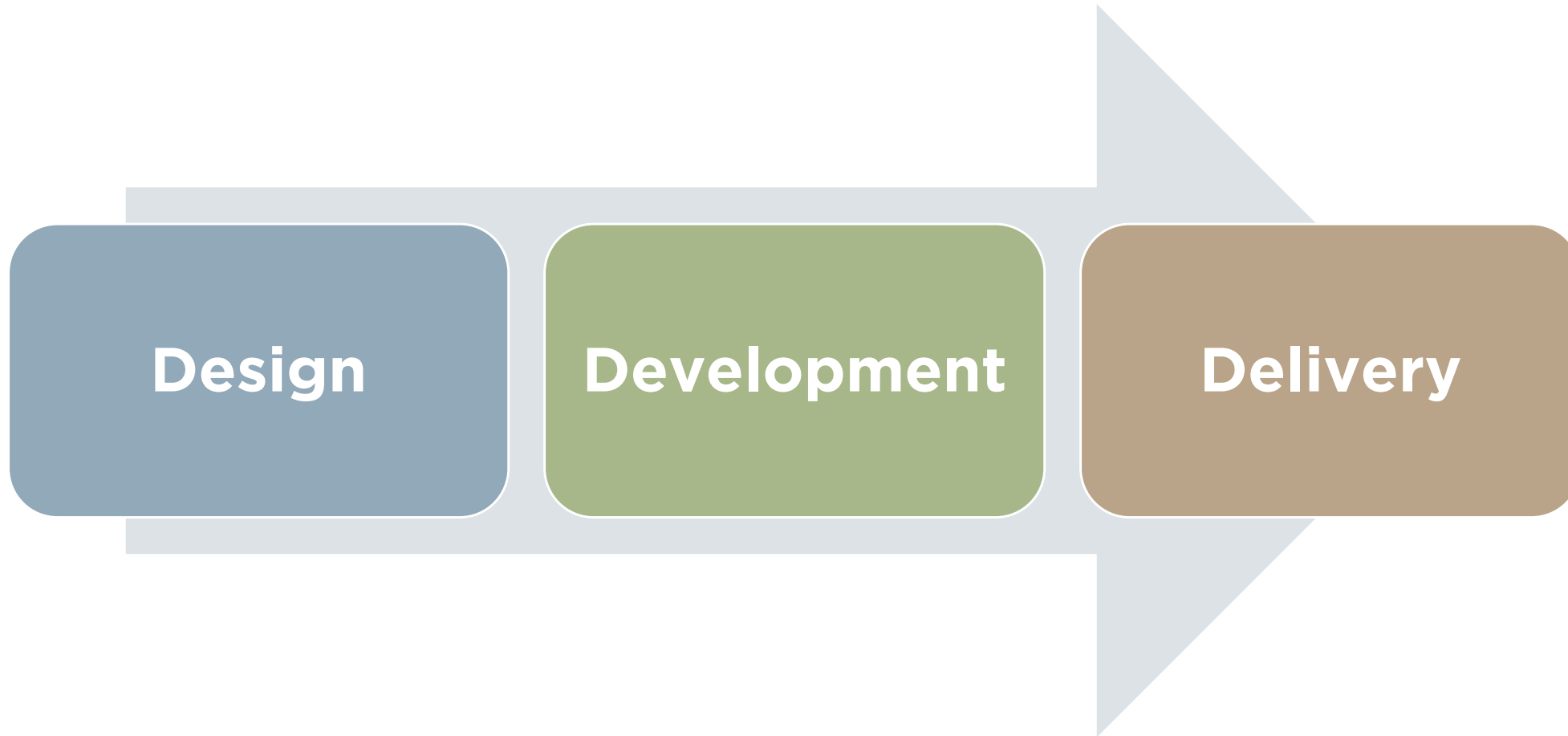
Needs Assessment- Design

- How are we ensuring that faculty make their ideas known?
  - Centralized method for faculty to request simulation activity

- How do we collect and sort through simulation ideas?
  - Collection method for the simulation requests
    - Scheduling Policy
    - Curricular Development Policy
  - System for separation/organization of requested based on the semester term.

- Who is responsible for following up on these items?
  - Single Point-of-Contact for all events

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Design Phase Workflow

SP Timeline

Pre-Confirmation	
Trello Card created	LC
Event placed on calendar	LC
Rooms Assigned	LC
OneDrive files created	LC
Event logistics determined	LC
OEM assigned	OL
EEM Assigned	ADSP
Conflicts Addressed	LC/OL/ADSP
Confirmation Email sent	LC
Template or Old cases sent	LC
Pre-Case Arrival	
Reminders Sent	LC
Humanity Shift created	SPT
Schedule and flow mapped out	OEM
Schedule and flow approved	OL
SP demographics determined	SPT
Potential case design meeting	ADSP
Case Received	LC

Manikin Timeline

Pre-Confirmation	
Trello Card created	LC
Event placed on calendar	LC
Rooms Assigned	LC
OneDrive files created	LC
Event Logistics determined	LC
OEM assigned	OL
EEM Assigned	DOE
Conflicts Addressed	LC/OL/DOE
Confirmation Email sent	LC
Template or Old cases sent	LC
Pre-Case Arrival	
Reminders Sent	LC
Potential case design meeting	DOE
schedule and flow mapped out	OEM
Schedule and flow approved	OL
Case Received	LC

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Needs Assessment- Development

- How do we ensure that information is delivered to the appropriate team members?
  - Event Logistics
  - Approved cases
  - Setup documents
  - Schedules

- How do we track case development and event logistics?
  - Shared drives
  - Checklists

- How do we ensure the appropriate technology is being utilized?
  - CHIPS Simulator Inventory

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Development Workflow

SP Timeline

Case Approval Process	
Meeting to adress case edits	ADSP
Approved cases on OneDrive/Trello	ADSP
Cases posted to Dropbox	ADSP
Logistics approved	OL/ADSP
Before Two Weeks Out	
Finalize Humanity info	SPT
Contact FOR for training date	SPT
Publish Humanity shift	SPT
Identify training date and notify LC	SPT
Schedule training and invite ADSP, SPT, OEM, and FOR	LC
Book rooms for training on B-Line	LC
Course and documents created in B-Line	OEM
Rubrics and door notes approved by FOR	OEM
Before One Week Out	
List of learners received	OEM
List of Faculty received	OEM
SP Rotation schedule created	SPT
SP Rotation Schedule approved	ADSP
SP Schedule posted in OneDrive	SPT
Schedule completed	OEM
Schedule posted in OneDrive	OEM
Proctor script/role finalized	OEM/SPT

Manikin Timeline

Case Approval Process	
Meeting to address case edits	EEM
Approved cases on OneDrive/Trello	DOE
Logistics approved	OL/DOE
Dry Run/Pilot scheduled	LC
Before Two Weeks Out	
Event Logistics understood	OEM
Case progression understood	OEM
Manikin file created	OEM
Event Setup/Equipment understood	OEM
Course and documents created in B-Line	OEM
Labs and images requested	OEM
Before One Week Out	
List of learners received	OEM
List of Faculty received	OEM
Schedule completed	OEM
Schedule posted in OneDrive	OEM
Dry Run/Pilot occurs	OEM/EEM

Needs Assessment- Delivery

- How do you ensure all events adhere to standards of best practice?
  - Dry Run/Pilot
  - SP Training

- How do you standardize and disseminate the information for each event?
  - Team Logistics Huddles
  - Project Management System Checklists

- How do you plan for data tracking management?
  - Learner numbers and hours
  - Manikin utilization
  - Setup/Breakdown hours

- How do you document quality improvement plans?
  - Script and case editing
  - Troubleshooting technical issues
  - Future event development

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Delivery Workflow

SP Timeline

Under One Week Out	
Final verification of info	OL
Final tweaks made	OEM/SPT
Trello card moves to "Event Ready"	OEM
SP Training occurs	SPT
Post-Event	
Data fields completed	OEM
Event Logisitics Sheet updated	LC
Case files and setup documented	LC
Issues documented	LC
Card moved to "After Event"	OEM
Post-Event SP Survey sent	LC
Post-Event Faculty Survey sent	LC
Card moved to "To Data Tracking"	LC
Data Tracking board management	PA
FOR response sorted	LC
Meeting needed?	ADSP/OL
Meeting scheduled	AA
QI plan implemented	ADSP/OL

Manikin Timeline

Under One Week Out	
Final verification of info	OL
Final tweaks made	OEM/EEM
Trello card moves to "Event Ready"	OEM
Post-Event	
Data fields completed	OEM
Event Logistics Sheet updated	LC
Case files and setup documented	LC
Issues documented	LC
Card moved to "After Event"	OEM
Post-Event Survey sent	LC
Card moved to "DASH Pending"	LC
DASH Tool completed by faculty	EEM
Card moved to "To Data Tracking"	EEM
Data Tracking board management	PA
FOR response sorted	LC
Meeting needed?	DOE/OL
Meeting scheduled	AA
QI plan implemented	DOE/OL

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Growing Pains

- In the face of exponential growth, how can we increase effective team communication?
  - FTE grow
  - PTE grow (SPs)
  - Simulation resources- building and equipment

SP Management Software

Cloud based scheduling platform allows:

24/7 access via website, smartphone and tablet app

Sync schedules to Calendar

Automatic email and text notifications

Clock in and out, view timesheets and payroll reports

Submit Availability, Request off, Confirm and Trade shifts

Access to Case Scripts and Training Materials

SP Management Software

SP Management Software

SP Information Provided

Who: College, Course and number level of learner

What: Learners will be doing, level of physical examinations that will be done.

When & Where:

Costume/Props:

How: Learners see the SP one on one, with a group etc. SPs complete a checklist on the computer.

Why: Formative or Summative

SP Objectives: The SP challenge is multifold, appropriately and accurately reveal the facts about the patient being portrayed; improvise only if necessary and in a manner that is consistent with the overall tone/content of the case. Maintain the realism of the simulation i.e. stay in character. Evaluate learners fairly based on how they performed in this encounter. Provide patient perspective in feedback.

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Project Management Software

- Trello
  - Simple to Complex board configuration
  - Collaborate with team members on multiple projects
  - Full integration into current operations
  - Built in automation
  - Add-ons for full customization

Implementation

Event Request

- Starting point for event confirmation
- Single point for faculty to input all simulation requests
  - Skip logic allows for customization of a single form
    - SP request
    - Manikin request
    - Non-Sim request
    - BLS/ACLS
- Customization of the email notification for CHIPS staff

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Event Logistics Sheet

- Central point of information

- Informs staff of the implementation plan

- Key information about
  - Date and Time
  - Number of Learners
  - Schedule flow
  - Documents needed

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Quality Improvement

Post-Event Timeline

SP Timeline

Post-Event	
Data fields completed	OEM
Event Logisitics Sheet updated	LC
Case files and setup documented	LC
Issues documented	LC
Card moved to "After Event"	OEM
Post-Event SP Survey sent	LC
Post-Event Faculty Survey sent	LC
Card moved to "To Data Tracking"	LC
Data Tracking board management	PA
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Meeting needed?	ADSP/OL
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Manikin Timeline

| Post-Event	
Data fields completed	OEM
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Card moved to "After Event"	OEM
Post-Event Survey sent	LC
Card moved to "DASH Pending"	LC
DASH Tool completed by faculty	EEM
Card moved to "To Data Tracking"	EEM
Data Tracking board management	PA
FOR response sorted	LC
Meeting needed?	DOE/OL
Meeting scheduled	AA
QI plan implemented	DOE/OL

Post-Event Process

Data Tracking

- Learners and Learner Hours

- Setup/Event/Breakdown Time

- Consumables/Equipment used

- Forecasting SP costs

- Case Diversity (SDoH)

Quality Improvement

- Faculty and CHIPS team input
  - Post Event Survey- Learner, Faculty, SP
  - QI label and card comments- CHIPS
  - Quality Improvement Council
  - DASH Assessment

- Development/Implementation
  - FADE Model
    - Focus
    - Analyze
    - Develop
    - Execute

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CHIPS Program Management Toolkit

- CHIPS Policy and Procedures
- Event Submission Form
- Manikin Workflow Timeline
- SP Workflow Timeline
- Project Management- Trello
- SP Management- Humanity
- Event Logistics
- SP Survey
- Faculty Survey

Design

Development

Delivery

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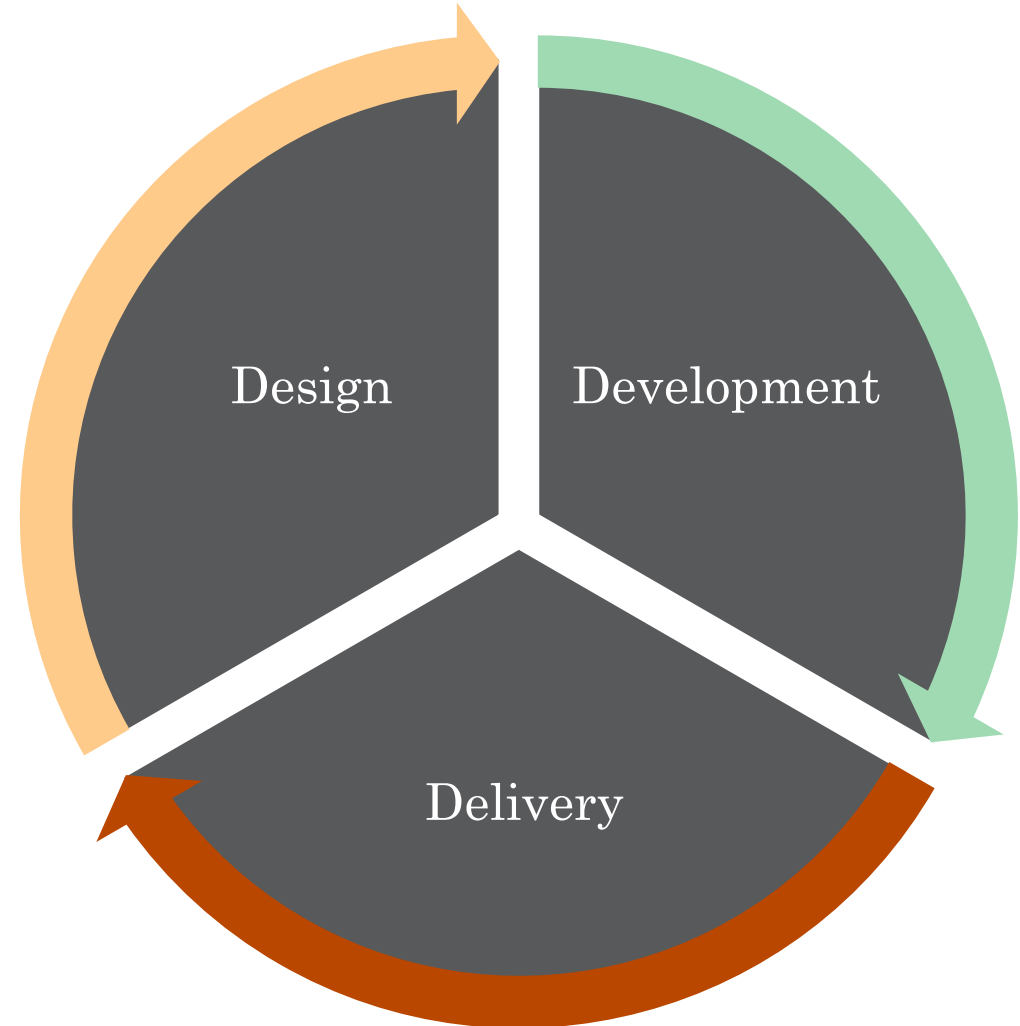
Summary

- Discuss the role that policies and procedures play in implementing an event management process
    - Rules that govern your event management process
    - Staff understanding of why we do what we do
    - Policies will constantly evolve

- Identify strategies for workflow efficiencies
    - Needs Assessment- Three D's
    - Checklist for operating procedures
        - Creating ownership of tasks
        - Identifying gaps in current process

- Identify tools and resources to assist in management of your simulation program
    - Scalable project management platform
    - Digital requests
    - Well documented process
    - Get creative!

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