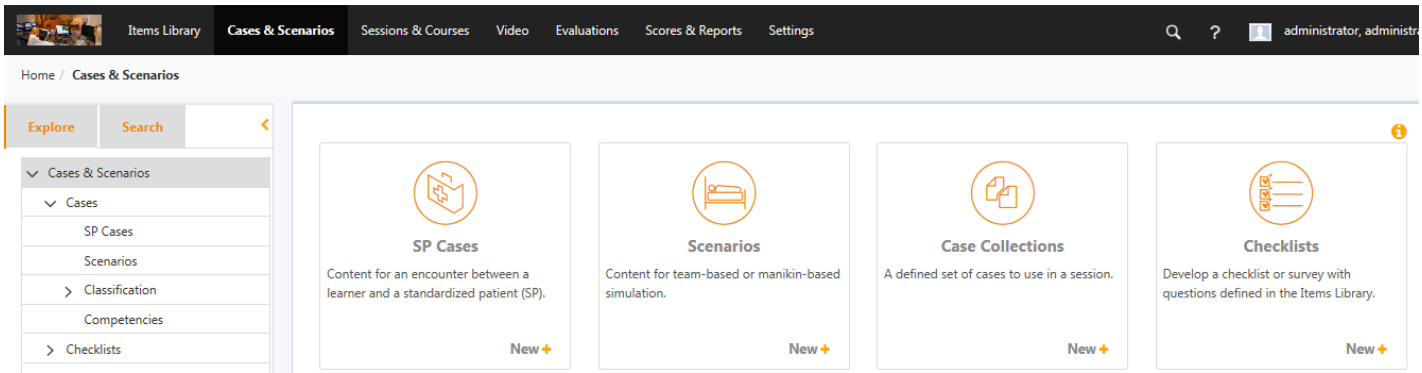
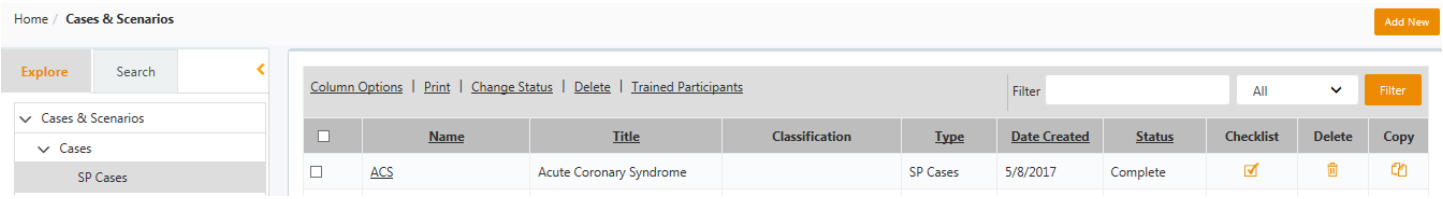
Create an SP Case

SP Cases define an encounter between a learner and a standardized patient. Scheduling a session requires either an SP case or a scenario.

Add a New Case/Copy Case

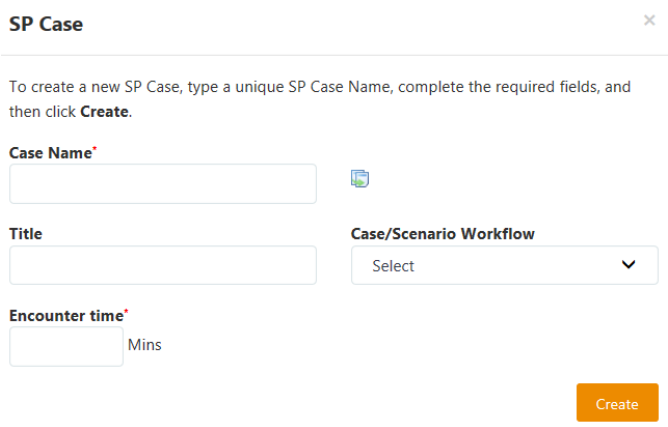


1. Click **Cases & Scenarios > SP Cases.**



2. Click **Add New** OR click the **Copy** icon next to an existing case.

Create Case

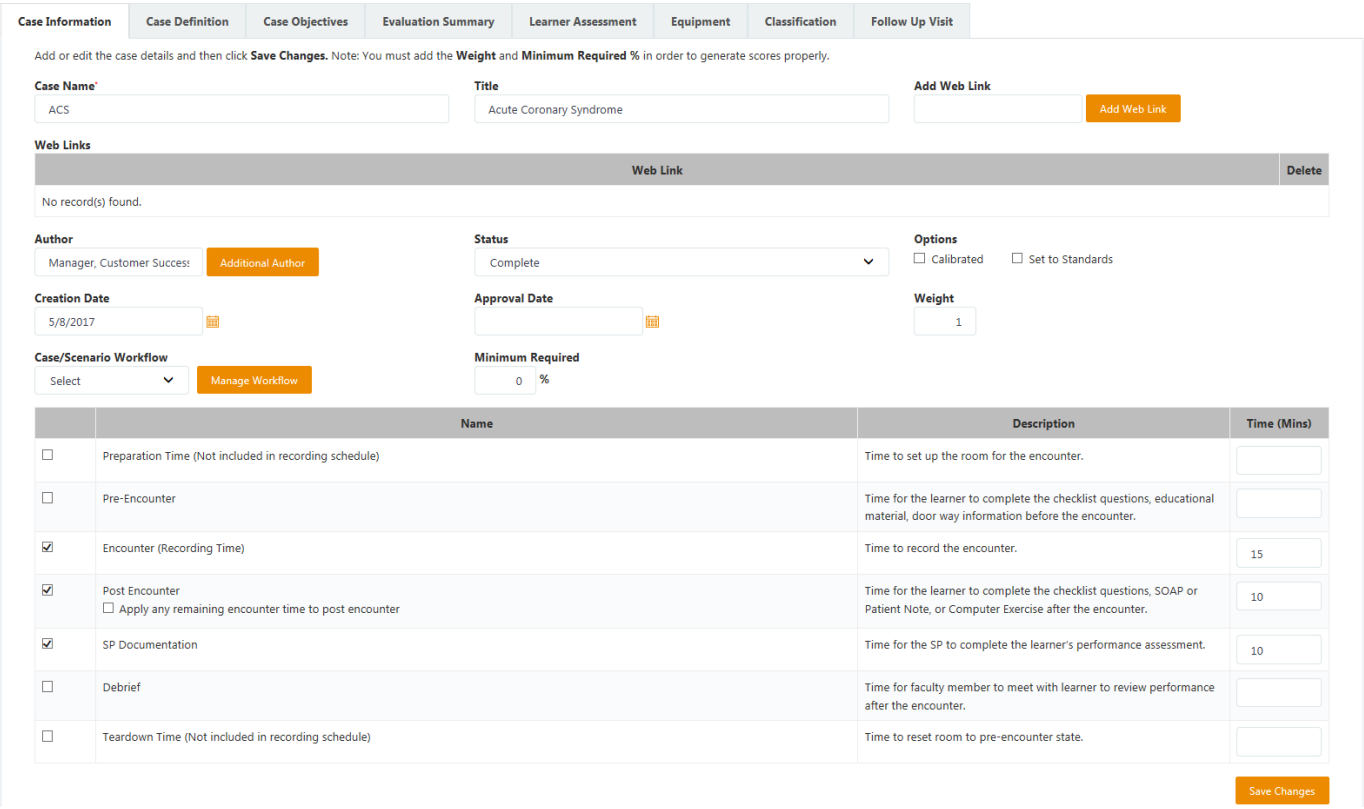


1. Complete the required fields:

Field	Description
Case Name*	Type a unique case name.
Title	Enter a more descriptive name for the case (optional). ***Note***: To show either the Scenario Name or the Title to learners, click **Settings > Parameters > Scheduling > Show case name in dashboard's To-Do List.**
Case/Scenario Workflow	Select an existing workflow (or add a new workflow after you click Create). See **Case/Scenario Workflow** for more information.
Encounter Time*	Amount of time the camera will record the learner's interaction with the SP during the encounter. • If you selected a Case/Scenario workflow, the encounter time will be added automatically. • If you did not select a workflow, enter the Encounter time.
* Required field	

2. Click **Create**.

Case Information



1. Add or edit the case details. ***Note***: You must add the **Weight** and **Minimum Required %** in order to generate scores properly.

Field	Description
Add Web Link	Add a link to a web page.
Author	Case Author name defaults to that of the logged-in user. Click **Additional Author** to add another author name. Highlight the text inside the **Author** text field and type a new author's name.
Status	Select one of the following: • **Complete** – Case needs to be marked complete in order for it to be available for scheduling and to be added to a Case Collection. • **Incomplete** – All new cases are incomplete until marked as complete. • **Retired** – Inactive, not in use.
Options	**Calibrated** – This is no longer required. Previously, this was checked when the case was marked Complete, in order to have responses collected and scores applied. This regulation has been lifted. **Set To Standards** – Check this box if the case will be used as a standard for a particular case or exam. Usually used for approved state licensing cases.
Creation Date	Date the case was created. To change the default date, click the **calendar**.
Approval Date	Optional. If your Organization Unit has someone who reviews and approves the case creation process, the approver can date stamp the case. Click on the calendar to select a date.
Weight	Enter the weight of this case. A case needs to be weighted for the case to be counted in the scoring process. The default value is 1. Cases within a Case Collection can be weighted differently. The system will adjust score according to weight given. A weight of zero means the data can be collected but it won't count in the scoring process. Enter up to 2 places to the right of the decimal for Weight (i.e., 1.00). **Note:** Use this is if the parameter **Case Collection Workflow Enabled** is set to Yes (Settings > Parameters > Cases & Scenarios). If set to Yes, proceed with instructions (see the Settings documentation for more information on parameters).
Minimum Required	The minimum percentage to pass the case based on the checklist scores of the learner. If the case is part of a Case Collection, then the minimum percentage is taken into account in relation to the entire collection score.
Case/Scenario Workflow	See **Case/Scenario Workflow** below for more information.

2. Click **Save Changes**.

Case/Scenario Workflow

From the Case/Scenario Workflow field, select an existing workflow or click **Manage Workflow** to create a new customized workflow to better manage the details of a case and the timeline necessary for the learner to complete the encounter with a standardized patient (SP).

Case/Scenario Workflow

Select | Manage Workflow

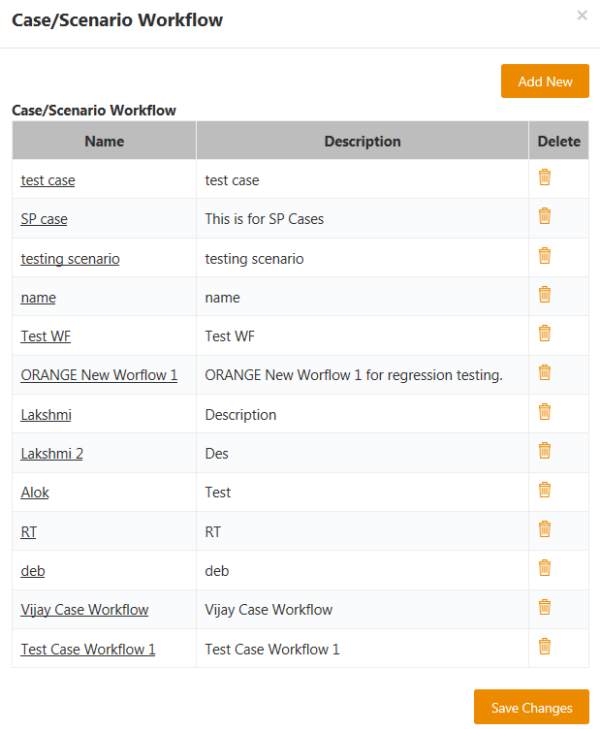
Minimum Required

0 %

	Name	Description	Time (Mins)
☐	Preparation Time (Not included in recording schedule)	Time to set up the room for the encounter.	
☐	Pre-Encounter	Time for the learner to complete the checklist questions, educational material, door way information before the encounter.	
☑	Encounter (Recording Time)	Time to record the encounter.	15
☑	Post Encounter ☐ Apply any remaining encounter time to post encounter	Time for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.	10
☑	SP Documentation	Time for the SP to complete the learner's performance assessment.	10
☐	Debrief	Time for faculty member to meet with learner to review performance after the encounter.	
☐	Teardown Time (Not included in recording schedule)	Time to reset room to pre-encounter state.	

Save Changes

1. From the **Case/Scenario Workflow** field, either:
   - Select an existing customized workflow
   - Complete the workflow grid, or
   - Click **Manage Workflow** to create a new customized workflow



2. Click **Add New**.

Case/Scenario Workflow

Name*

Description*

Real...

Workflow Type*

☑ SP Case ☐ Scenario

Case/Scenario Workflow*

	Name	Description	Time (Mins)
☐	Preparation Time (Not included in recording schedule)	Time to set up the room for the encounter.	
☐	Pre Sim Study Time	Time for the learner to review the study materials.	
☐	Pre-Encounter	Time for the learner to complete the checklist questions, educational material, door way information before the encounter.	
☐	Encounter (Recording Time)	Time to record the encounter.	
☐	Post Encounter ☐ Apply any remaining encounter time to post encounter	Time for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.	
☐	SP Documentation	Time for the SP to complete the learner's performance assessment.	
☐	Debrief	Time for faculty member to meet with learner to review performance after the encounter.	
☐	Teardown Time (Not included in recording schedule)	Time to reset room to pre-encounter state.	

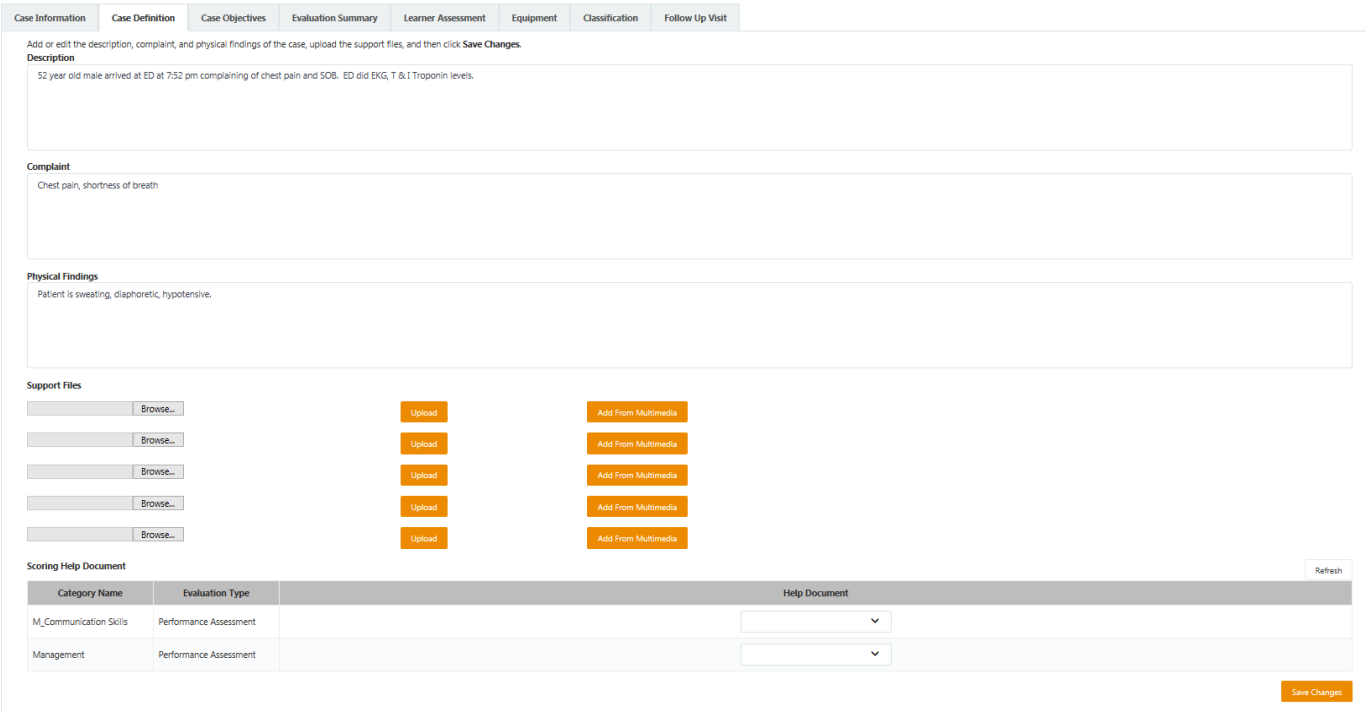
Save Changes

3. Complete the following fields:

Field	Description
Name*	Name the workflow.
Description*	Add a description of the workflow.
Workflow Type*	Defaults.
Preparation Time	Number of minutes needed to set up the room for the encounter.
Pre-encounter	Number of minutes for the learner to complete the checklist questions or educational material before the encounter.
Encounter (Recording Time)	Number of minutes needed to record the encounter between the learner and the SP.
Post Encounter	Number of minutes for the learner to complete the checklist questions, SOAP or Patient Note, or Computer Exercise after the encounter.
SP Documentation	Number of minutes for the SP to complete the learner's performance assessment.
Debrief	Number of minutes needed for faculty member to meet with learner to review performance during the encounter.
Teardown Time	Number of minutes needed to reset room to pre-encounter state.
* Required field	

4. Click **Save Changes**.

Case Definition

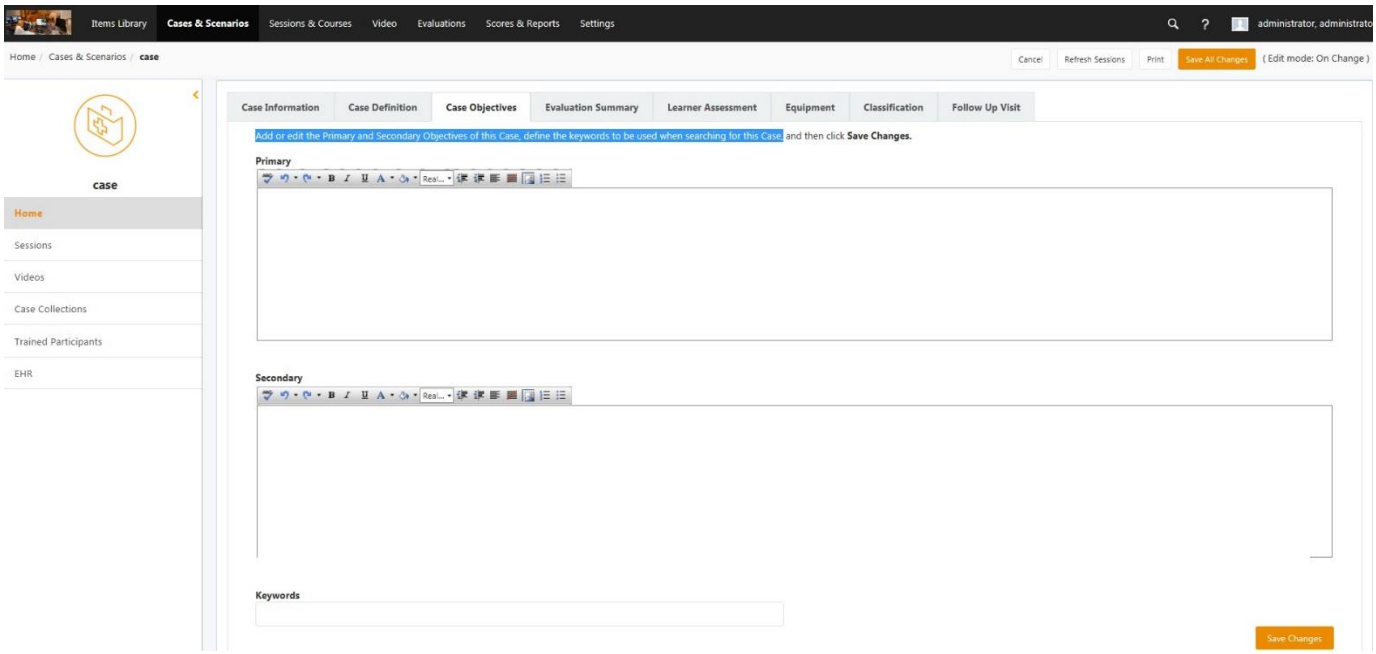


1. Add or edit the description, complaint, and physical findings of the case, and upload support files.

Field	Description

Description	Click in the text field and add the description for the case.
Complaint	What will be the SP's complaint?
Physical Findings	Indicate any physical clues the learner will need to notice.
Support Files	Upload new files or add existing files from Items Library any files including images or videos that will aid in the creation of the case definition.
Scoring Help Document	To include a support file after the file is uploaded, press **Save Changes** for this section, **Save All Changes** for the activity page, and press the **Refresh** button (only the Scorer will see this file).

Case Objectives



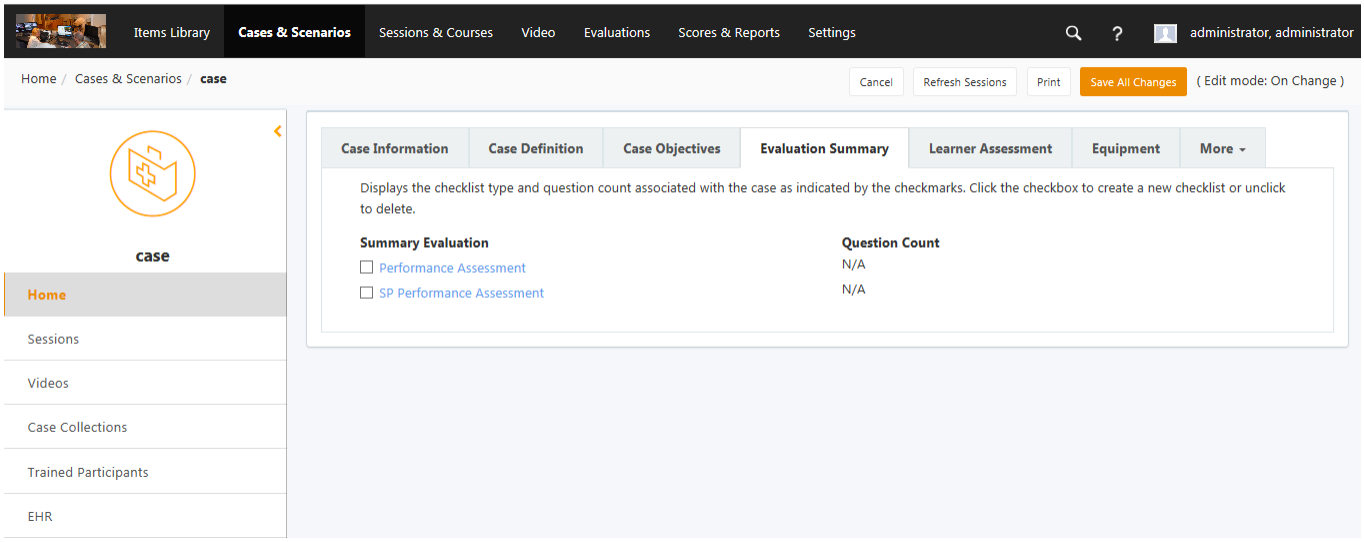
Add or edit the primary and secondary objectives of the case, define the keywords to be used when searching for this case.

1. Define the **Primary** purpose of the case.
2. Define the **Secondary** purpose of the case.
3. Define the **Keywords** that will act as a filter when searching for this case.

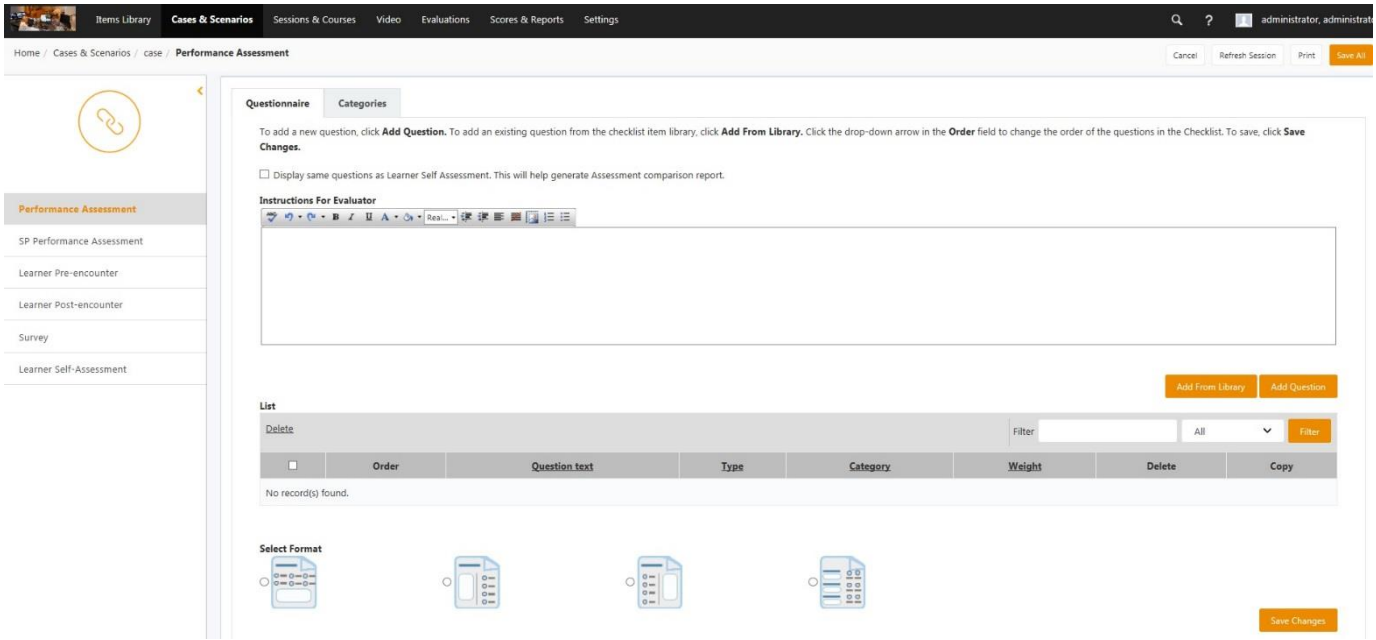
Evaluation Summary

Two types of evaluations can be added to a case:

Performance Assessment	An assessment of the learner by an Evaluator, either an SP and/or an Educator.
SP Performance Assessment	An assessment of the SP's presentation as a realistic patient.



1. Click either **Performance Assessment** or **SP Performance Assessment**.



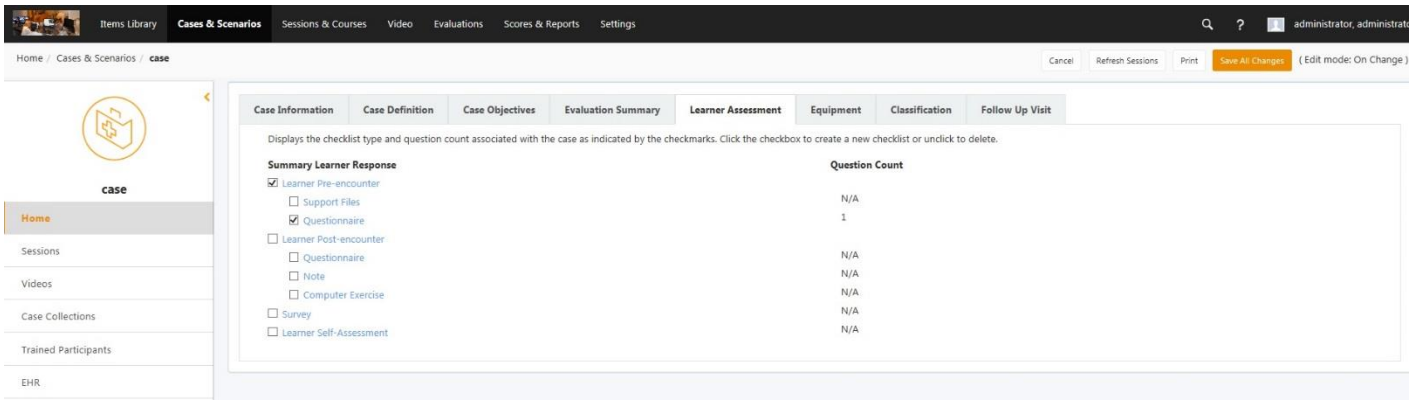
2. Complete the following fields:

Field	Description
Questionnaire tab	

Instructions for the Evaluator	Instructions to help the Evaluator score the assessment.
Add From Library	Add existing questions. Search for question text in the Items Library, Checklists, or Cases/Scenarios, select the questions from the grid and then click Add.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
Select Format	Select the checklist format. The icons show the formation of the question and its comment box.
Categories tab	
Categories list	Appear as questions are added.

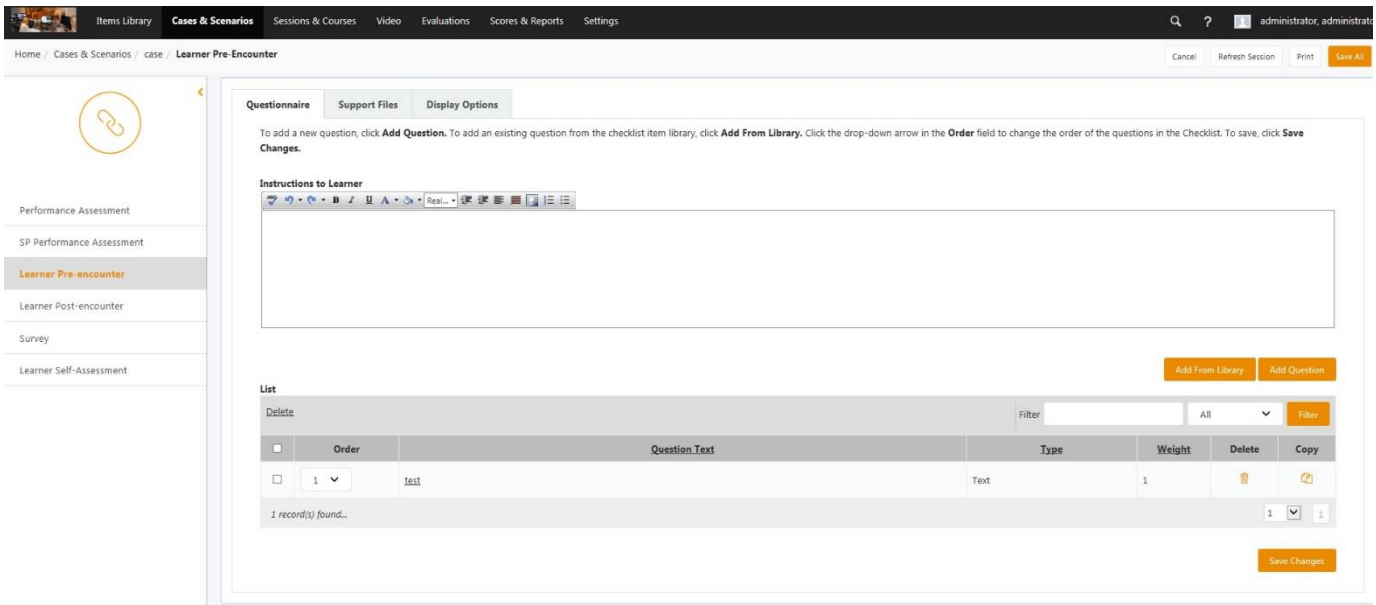
3. Click **Save Changes**.

Learner Assessment



Learner Pre-Encounter

A questionnaire and support files to be made available to the learner before the SP encounter.



1. Complete the following fields:

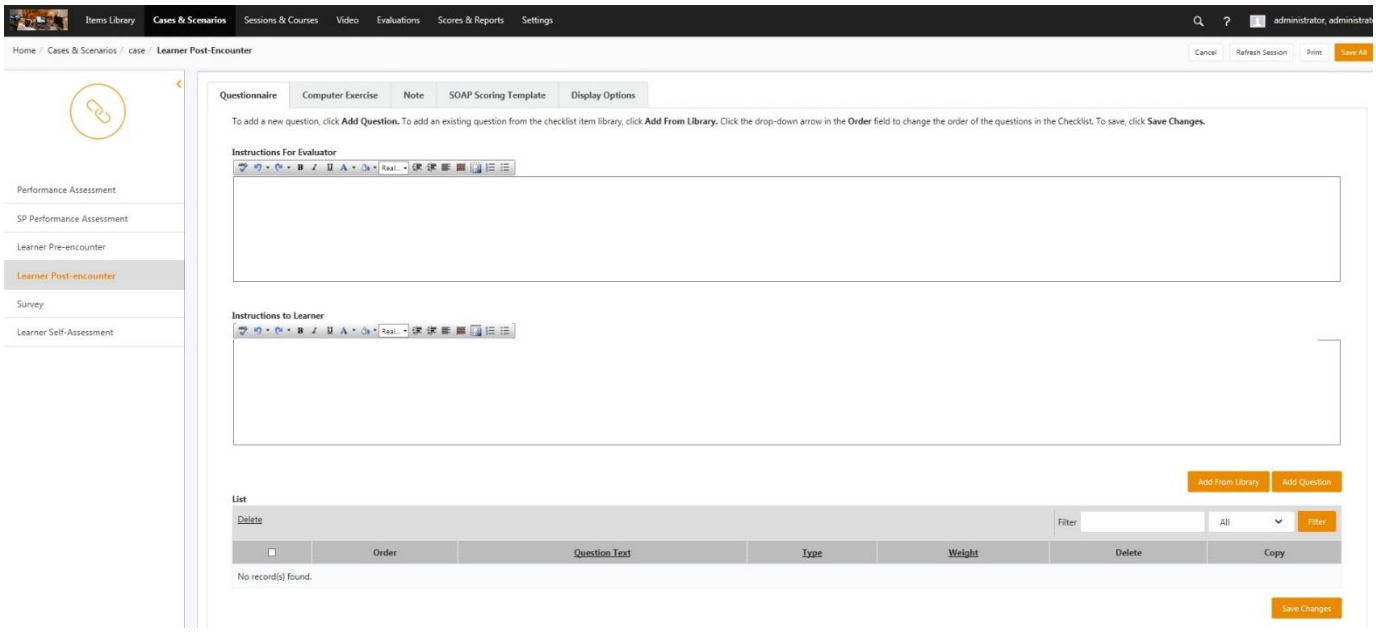
Field	Description
Questionnaire tab	
Instructions for the Evaluator	Instructions to help the Evaluator score the assessment.
Add From Library	Add existing questions. Search for question text in the Items Library, Checklists, or Cases/Scenarios, select the questions from the grid and then click Add.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information

Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
Support Files tab	
Support Files	Click **Add Support Files** to add a maximum of three files to the pre-encounter checklist.
Display Options tab	
Required Pass %	The minimum overall score that is needed for a student to pass the case. A zero in this box denoted that there are no minimum pass requirements for the case.
Weight	Enter the weight of this case. A case needs to be weighted for the case to be counted in the scoring process. The default value is 1.
Must Pass	Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the Question Weight and Minimum Required percentage to pass fields. These are mandatory in order to specify the conditions to pass.
Define Duration for Each of the Section(s) Defined in Questionnaire	Question order can be rearranged when this box is checked.
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
Show questions on a single page	When this box is checked, all the questions will appear on one page. If unchecked, each question will be on its own page.
Allow student to review recently completed sections	Available when **Show Questions** on a single page is selected. This allows learner to navigate back to a previous section of the Checklist.
Show Timer on Screen	A timer will be visible allowing learner to see how much time is left to complete the Pre-encounter exercises. When the timer expires, that section of the test ends and the next section is presented until the completion of checklist.

2. Click **Save Changes**.

Learner Post Encounter

A questionnaire, Computer Exercise, SOAP Note or Patient Note to be presented to the learner after the encounter.



1. Complete the following fields:

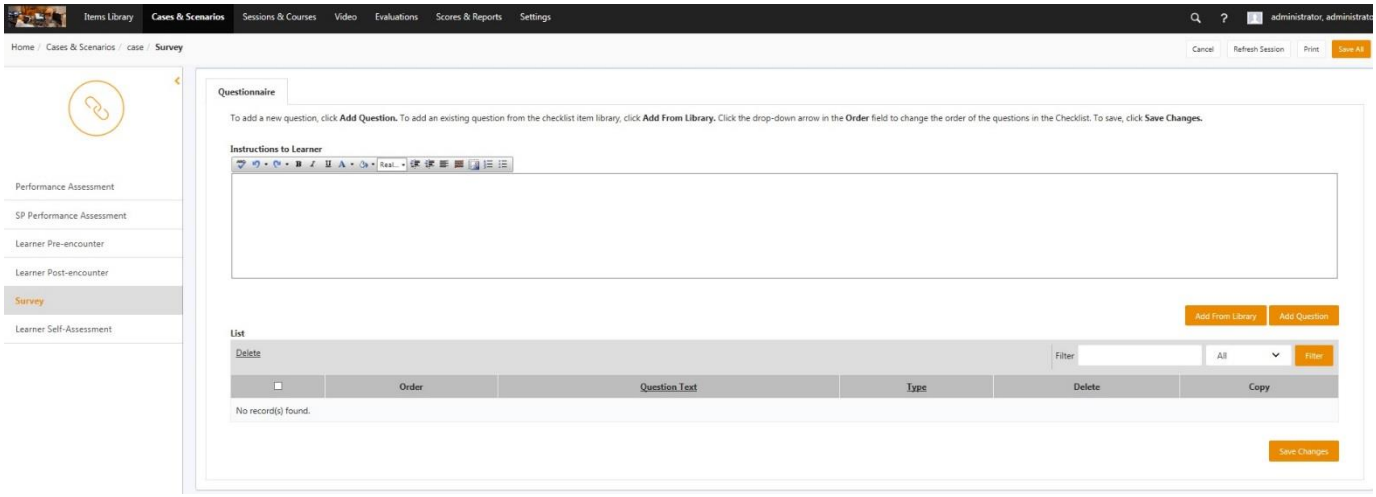
Field	Description
Questionnaire tab	
Instructions for the Evaluator	Instructions to help the Evaluator score the assessment.
Instructions to Learner	Instrctions for the learner when completing the post encounter checklist.
Add From Library	Add existing questions. Search for question text in the Items Library, Checklists, or Cases/Scenarios, select the questions from the grid and then click Add.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
Computer Exercise tab Clinical Competency Computer Exercise is designed to encourage the student to submit findings, develop hypotheses, order and evaluate lab results and finally determine a diagnosis and treatment plan. This will be presented to the student as a multi-step exercise.	
Instructions to Learner	Enter instructions to be viewed by the learner when completing the Post-encounter checklist.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
Note	
Note Type	Select a Note type:

	SOAP Note	SOAP Note (Subjective, Objective, Assessment, and Plan) is an industry standard format used to document subjective and objective findings, assessment, and plan of treatment of the patient's current status. It requires the student to identify diagnostic hypotheses, order labs and then justify a final diagnosis and treatment plan.
	Patient Note	Patient Note provides a maximum of 11 questions for the student to complete following the encounter with the SP or simulator. Once Patient Note is selected, all questions will be added to the note. You can modify or delete the questions.
Instructions to Learner	Enter instructions to be viewed by the learner when completing the Post-encounter checklist.	
Weight	Click the + sign, add/edit Question Text, add instructions for the learners and the Question Weight and then click **Create**.	
SOAP Scoring Template tab		
A system-generated scoring rubric for to evaluate the learner's SOAP note responses. The rubric can be edited: Click the icon to edit the SOAP Note Scoring template. Click + to open a section of the SOAP Note.		
Display Options tab		
Required Pass %	The minimum overall score that is needed for a student to pass the case. A zero in this box denoted that there are no minimum pass requirements for the case.	
Weight	Enter the weight of this case. A case needs to be weighted for the case to be counted in the scoring process. The default value is 1.	
Must Pass	Check this box if the correct response to this question is mandatory for the learner to pass the entire exercise. Checking this box will populate the Question Weight and Minimum Required percentage to pass fields. These are mandatory in order to specify the conditions to pass.	
Define Duration for Each of the Section(s) Defined in Questionnaire	Question order can be rearranged when this box is checked.	
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.	
Show questions on a single page	When this box is checked, all the questions will appear on one page. If unchecked, each question will be on its own page.	
Allow student to review recently completed sections	Available when **Show Questions** on a single page is selected. This allows learner to navigate back to a previous section of the Checklist.	

Show Timer on Screen	A timer will be visible allowing learner to see how much time is left to complete the Pre-encounter exercises. When the timer expires, that section of the test ends and the next section is presented until the completion of checklist.

2. Click **Save Changes**.

Survey



A questionnaire presented to the learner after he or she completes the Post-encounter checklist, or if added when scheduling a session, the survey will follow the last encounter of the session.

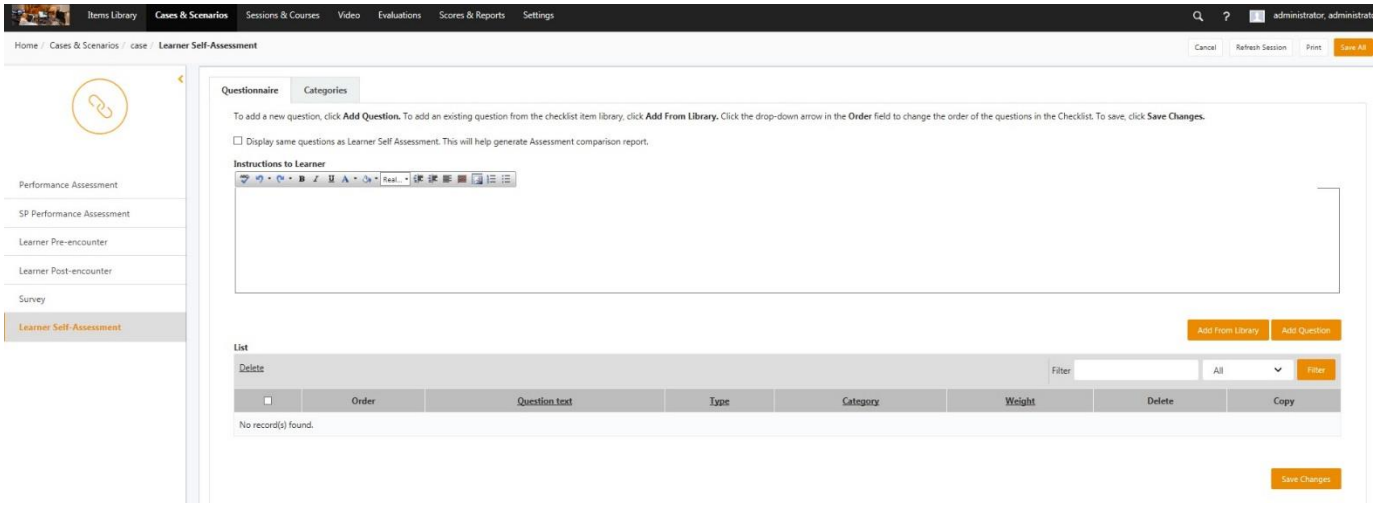
1. Complete the following fields:

Field	Description
Questionnaire tab	
Instructions for the Evaluator	Instructions to help the Evaluator score the assessment.
Instructions to Learner	Instrctions for the learner when completing the post encounter checklist.
Add From Library	Add existing questions. Search for question text in the Items Library, Checklists, or Cases/Scenarios, select the questions from the grid and then click Add.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.

2. Click **Save Changes**.

Learner Self-Assessment

A questionnaire for the learner to assess his or her performance.



1. Complete the following fields:

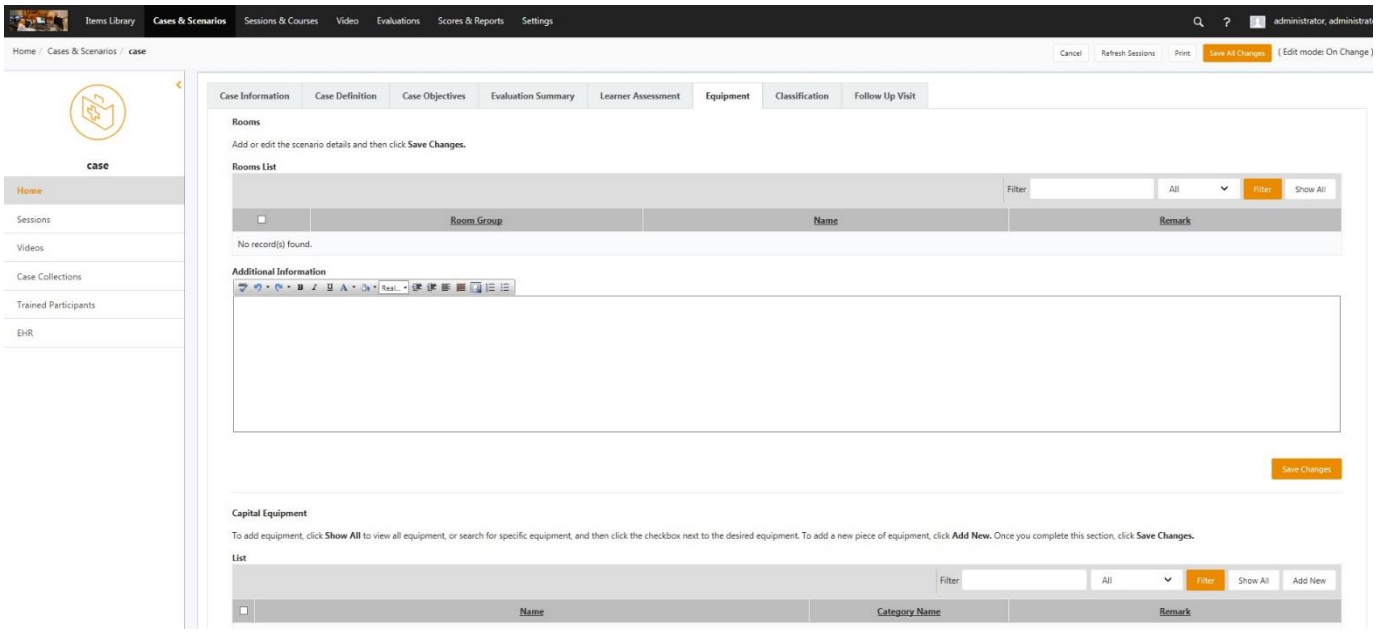
Field	Description
Questionnaire tab	
Instructions for the Evaluator	Instructions to help the Evaluator score the assessment.
Add From Library	Add existing questions. Search for question text in the Items Library, Checklists, or Cases/Scenarios, select the questions from the grid and then click Add.
Add Question	Create new questions and save to the Items Library for future use. See **Create Questions** for more information
Order	When multiple questions are added to the List Box, the order of the questions in the Checklist can be rearranged by clicking the drop-down arrow in the **Order** field and selecting the new chronological order.
Select Format	Select the checklist format. The icons show the formation of the question and its comment box.
Categories tab	
Categories list	Appear as questions are added.

2. Click **Save Changes**.

Equipment

Specify the **Rooms**, **Capital Equipment**, **Supplies**, and **Drugs** and the quantity required for the case. Disposable supplies and drugs are deducted from inventory if marked as Disposable in Inventory. Remarks can be used to give further instructions about the setup.

The Equipment added here is only requested equipment. Disposable supplies and drugs will not get deducted from inventory until this scenario is scheduled in the Session Calendar.



1. Complete the following fields:

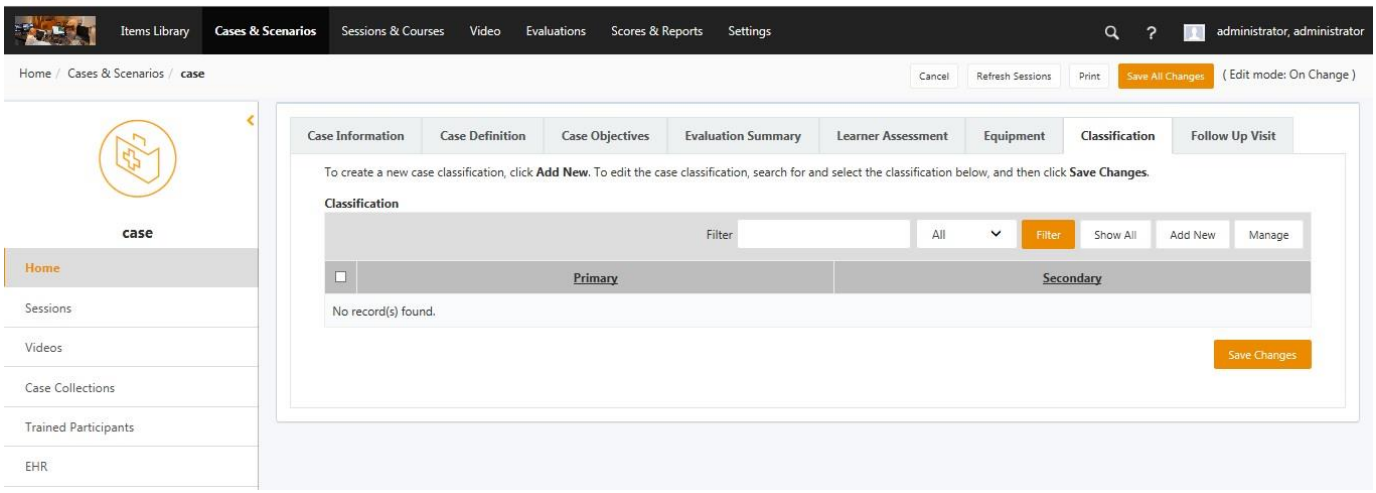
Field	Description
Rooms	Click **Show All** to display the rooms added in Settings > AV Configuration> Rooms and then click the checkbox(es) to select.
Additional Information	Add room instructions.
Capital Equipment Capital equipment is non-disposable inventory stored and owned by the Organization Unit. For example: hospital bed, cardiac monitor, simulator manikin. Each time a session is scheduled, the system will check the quantity on hand and the sum of quantities being used in sessions during that time. If the requested quantity is more than the available quantity, a message will be displayed; however, the equipment and session can still be scheduled.	
1. To add existing equipment, click **Show All** and then click the checkbox(es) to select, or click **Add New**, complete the required fields and then click **Create**. 2. Add **Additional Information** as needed about how the capital equipment should be set up for the simulation. 3. Click **Save Changes.**	
Supplies Supplies can be disposable or non-disposable. Disposable supplies will be deducted from inventory upon the scenario being scheduled in a session.	

For non-disposable supplies, the system will check the quantity on hand and the sum of quantities being used in sessions during the time a session is scheduled. If the requested quantity is more than the available quantity, a message will be displayed; however the session can still be scheduled.
1. To add supplies, click **Show All** and then click the checkbox(es) to select, or click **Add New**, complete the required fields and then click **Create**. 2. Add **Additional Information** as needed about how the supplies should be set up for the simulation. 3. Click **Save Changes.**
Drugs Specify the drugs needed for the scenario. Drugs are a disposable supply and will be deducted immediately from inventory when the session is scheduled.
1. To add drugs, click **Show All** and then click the checkbox(es) to select, or click **Add New**, complete the required fields and then click **Create**. 2. Add **Additional Information** as needed about how the drugs needed for the simulation. 3. Click **Save Changes.**

2. Click **Save Changes**.

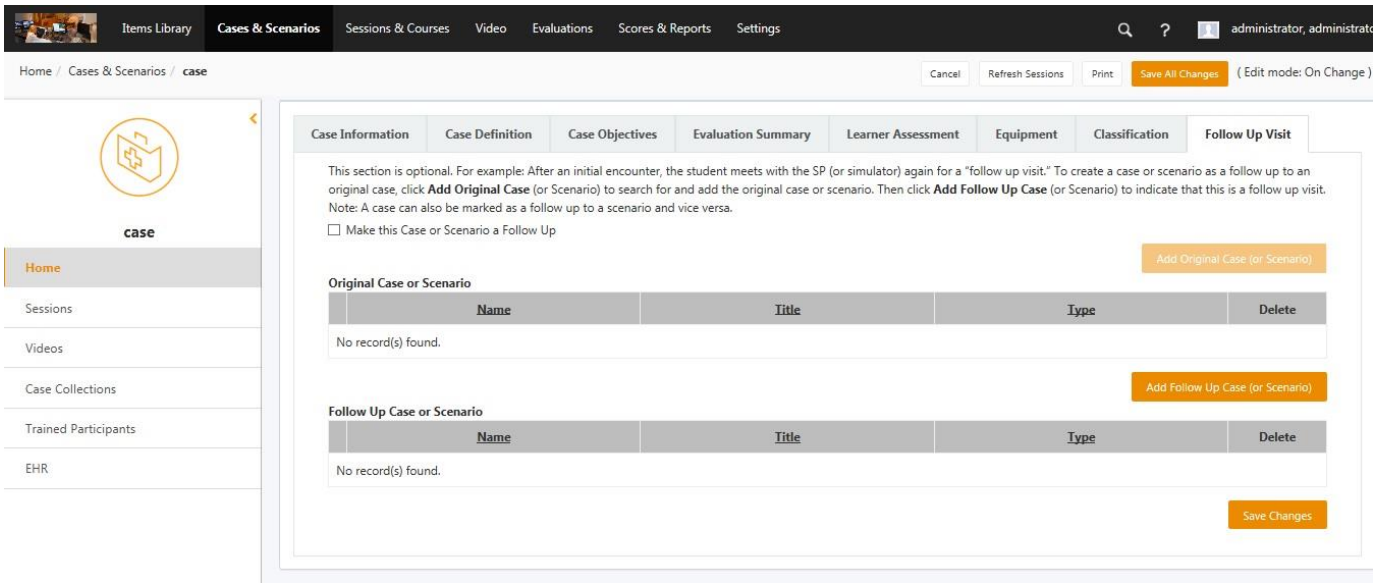
Classification

A Classification helps organize your cases.



1. To add a classification, click **Show All** and then click the checkbox(es) to select, or click **Add New**, complete the required fields and then click **Create**.
2. Click **Save Changes.**

Follow Up Visit



To make this case a follow up to an existing case:

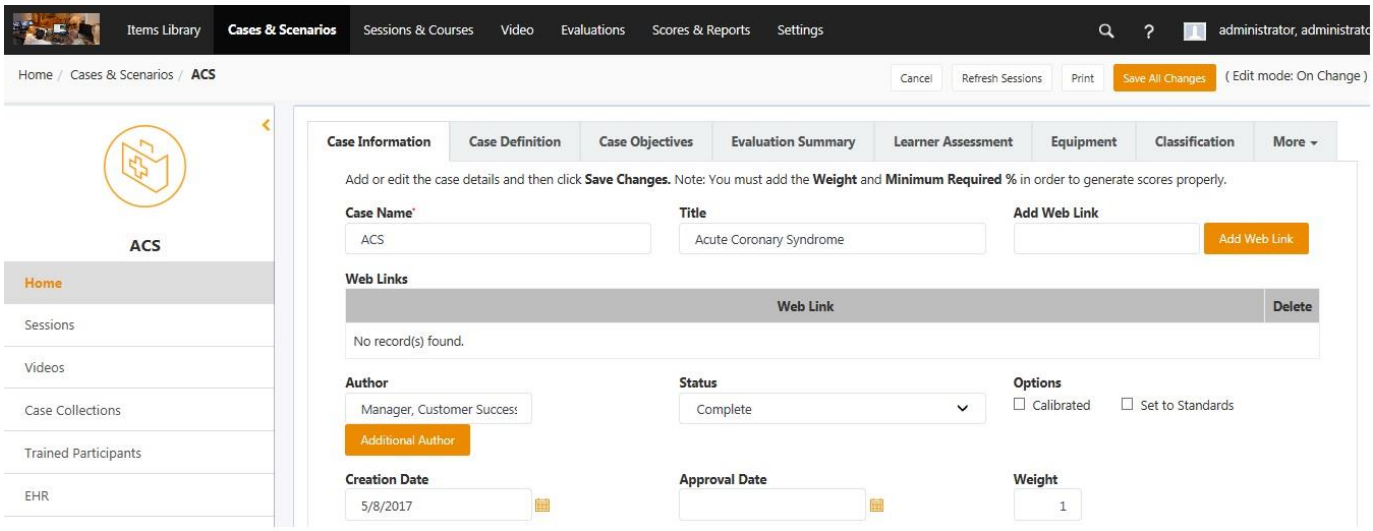
1. Click the checkbox next to **Make this Case a Follow-up** case.
2. Click **Add Original Case** and then click the checkbox next to the original.
3. Click **Save Changes**.

To add a follow up case to this case.

1. Click **Add Follow Up Case** and then click the checkbox next to the follow up case.
2. Click **Save Changes**.

Toolbelt

Use the Toolbelt to access items directly related to this Case.



Field	Description
Home	Return to the case activity page.
Sessions	View all sessions based on this case.
Videos	View video recorded using this case. Click the video link in the Date column, click the Show Details button under the video to open that video's Playback Activity Page. From here, the video can be viewed and/or bookmarked and details of the video information can be edited.
Case Collections	See if this Case is part of a Case Collection (e.g., Cases grouped for a common criterion, such as 3rd-year OSCE Exam).
Trained Participants	Assign SPs trained for the case
EHR	View a list of virtual EHR patients assigned to this Case. Or, assign a patient by clicking the Assign EHR Patient button. If the EHR module has been purchased, this will be visible.