# 2012

# Simulation Center Policy and Procedure Manual

SSH

Society for Simulation in Healthcare

In 2010, the Society for Simulation in Healthcare established an international team from various healthcare simulation-based training centers.

This team, comprised of experienced members in simulation center operations and management, was tasked to create a template for SSH members to utilize for the creation of policies and procedures.

This manual outlines commonly used practices and serves as a general model for simulation centers.  Core topics are outlined and each topic includes a brief description to assist centers in understanding that particular goal.

When using this document, centers should feel free to edit, add to or omit topics depending on the specific needs of their facilities.  The end result will be a customized "Policy and Procedure Manual" addressing fundamental issues to efficiently and effectively operate a simulation center.

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The T&S Committee would like to thank the efforts of the authors in bringing this project to conclusion.  We hope that this will prove to be a very valuable resource for all who use it!

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**POLICY & PROCEDURE CRITERIA**

1.  **General Information**

    a.  **Mission statement:** Create a statement specific to the simulation center, yet in alignment with the parent institution, (e.g., university or hospital). A mission statement is brief and states the purpose of your simulation center.

    b.  **Vision statement:** This statement can be the same vision statement as the parent institution. The vision statement reflects a larger ambition in that it defines where you want to be in 5 – 10 years.

    c.  **Governance – Organizational chart:** Develop a chart that identifies the stakeholders and defines specific reporting lines within the simulation center; it delineates levels of authority for reporting, evaluations, and decision-making.

    d.  **Decision-making process:** This process defines how decisions are made regarding equipment purchases, prioritizing projects, resolving scheduling conflicts, and other disagreements or uncertainties. This section goes hand-in-hand with the organizational chart.

    e.  **Required disclaimers and pre-event statements:** This policy should address outside presenters (e.g., guest instructor vendor) for a simulation-related class or event hosted or sponsored by the university/hospital. This policy ensures that the material presented is in alignment with your values and the simulation center is well represented. The primary purpose is to protect the identity of the simulation center and respect the philosophy of using simulation-based learning.

    f.  **Required event or course acknowledgements:** This policy addresses using the name of the simulation center when presenting projects to external audiences. The policy should clearly state when, how, and by whom these presentations must be approved; and if non-faculty are presenting, then this must be cleared with the director of the simulation center. The intent of this policy is to ensure that the simulation center has quality representation at all times.

    g.  **Simulation facility "Brand" use policy:** Create a policy stating how the simulation center is to be acknowledged in documents to establish consistency (e.g., if you have a specific name and sequence you want to be included in published writings). The statement should include guidelines regarding when the simulation center needs to be acknowledged in a publication.

h. **Hours of operations:** Develop a clear statement identifying when the simulation center is open for business. Be sure to consider the time requirements for set-up and clean-up when scheduling simulation sessions. Also, you will need to determine internal use times and external use times, and prioritize these when time conflicts arise.

i. **Simulation center terminology:** Prepare a guideline of what simulation terms are used at your simulation center and how they are used (e.g. a session – is a session defined as a series of scenarios followed by a debriefing or a single scenario followed by a debriefing). It is a tool to have clear, concise, and consistent taxonomy used within the facility by all.

2. **Personnel:** This statement should explain the personnel structure within your center and how instructors and participants are to interact with them.

3. **Administrative Information**

   a. **Support staff and contact tree:** The contact tree is helpful in case the center needs to shut down for an emergency. Its basic function is to assist a designated number of people with the contacting of staff, instructors, and participants.

   b. **Overtime policy:** This policy is typically set by the entity that governs the center. Special consideration can be made for courses where the center may charge a fee and allow for overtime.

   c. **Scope of work/description for each personnel classification:** This policy allows people to have direction on what their function is at the simulation center. The size of the simulation team may vary depending on funding, space and the priority stakeholders of a given center. Include personnel lists and reporting structures. A scope of services should also be provided.

   d. **Organizational chart:** This chart is necessary for staff and/or visitors to know the reporting and/or personnel structure of the facility.

4. **Course Directors / Instructors**

   a. **Instructor training:** Establish standards for teaching within your simulation center. In particular, the development and delivery process of simulation-based educational programs should be standardized. Instructor training is central to this standardization, which consists of two major components: course content and using simulation technology for teaching.

      i. <u>Course content</u>: It should be the responsibility of the course author to identify instructors to assist in teaching their courses. It should

also be the responsibility of the course author to train these instructors on the course content. Course content should be validated before delivery. You should examine best practices models prior to completing this section.

  ii. <u>Simulation technology</u>:  Courses can utilize various pieces of equipment within the simulation center. Most course authors are not experts on the equipment. Simulation center staff should work with the course author and instructors on teaching them how to utilize the equipment pertinent to their courses. Simulation center personnel can be used as additional actors or actresses for sessions if needed.

b.  **Code of conduct:** Develop a policy that describes basic behavior and compliance expectations of personnel. Instructors, students and staff are expected to act professionally and abide by rules. The course instructor has the right to remove any participant from the center. Simulation center staff should have the right to remove anyone (e.g., instructors, students, etc.) from the facility. You should explain and document your process for removal, as well as managing complaints.

c.  **Course development policy:** Develop a standardized template for the creation of courses within your simulation center. This section should explain that process. There should be no exceptions to this process, as it ensures standardization and quality control.

d.  **Evaluation policy:** Create a policy that describes the evaluation process for courses. All courses should have an evaluation component. Most centers ask for a "General" section of the evaluation, where participants can comment on the center, the infrastructure and the staff. A course-specific component will address the course content, quality, and effectiveness of the simulation sessions and lectures. In the final component, each instructor should be evaluated. This policy should specify who should review evaluations and who should have access to them. Develop an "evaluation of course participants policy." State that participants will be evaluated and explain the administrative process for the evaluations.

e.  **Course registration:** Explain how all participants and instructors should register for courses or any other events that are held at the simulation center. More specifically, this section should state what information (such as course name, course date / time, department, professional title) should be identified during registration.

**f. Equipment utilization:** Identify and develop policies on equipment utilization within the simulation center with specific do's and don'ts. For example: *DO NOT use pen on any manikin within the center. Make sure you shut all projectors off when you leave for the day*.

**g. Instructor travel**: Create a policy that describes travel protocols. If instructors travel on behalf of your simulation center, you should establish clear polices on such items as: who is paying for the travel, who is responsible for the shipping of equipment and who are the key contacts to assist that instructor.

5. **Course Participants**

   a. **Course preparation**: This should address key elements:
      i. Must complete all assigned pre-class assignments.
      ii. Must show up for class on time.
      iii. Must contact the instructor if you cannot meet class requirements or not able to attend the class.

   b. **Code of conduct**
      i. Issues with classmates should be addressed to the instructor.
      ii. Disruptive participants will be removed from the center.
      iii. Participants are expected to arrive at the center in proper attire (describe proper attire).

   c. **Cell phone usage**
      i. The use of cell phones is prohibited during classes, unless otherwise determined by the instructor or simulation center staff member.
      ii. All public use of cell phones should be conducted outside of the simulation center.
      iii. The use of cell phones for the purpose of video recording or taking of pictures is prohibited.

6. **Scheduling Courses and Rooms**

   a. **Approval process:** All initial courses or events should be approved by operational or administrative leadership of the simulation center. There are four main components to the approval process:
      i. The course must be approved by designated leadership.
      ii. Does this course meet the training missions of the simulation center?
      iii. How this course is financially supported?
      iv. Can this course be taught by utilizing simulation or components of simulation?

b. **Scheduling process:** Once a course has been created, it can be scheduled accordingly. Most centers utilize some form of a reservation process to accomplish this. This section should explain the process for requesting a course to be scheduled and might include an information form to designate rooms, equipment, and staff requirements.

c. **Notification:** Once a course has been approved, the instructor should be notified. Additionally, establish whose responsibility it would be to notify the participants. This should be clearly outlined in this section.

d. **Priority of use:** Most centers now operate under a "First Come, First Serve" policy. Whatever your center's policy is, you should explain it here. You should also explain that courses can be cancelled at the discretion of the simulation center.

e. **Cancellation policy:** There are three issues to consider when cancelling a course:
    i. Notification to the simulation center.
    ii. Notification to the instructors.
    iii. Notification to the participants.
    iv. The details of who will contact what group should be clearly explained in this section. Example: A course gets cancelled, the instructor calls the center, the center then sends emails and / or calls all participants. Specify a timeframe for cancellation.

f. **Recording of scheduled events (e.g., calendar structure and information):** It should be the policy of the simulation center to keep an accurate account of what courses ran at the center, dates of the course, number of participants, departments, etc.

g. **Scheduling Disputes: (conflict resolution)**
This policy should address how the center will resolve scheduling conflicts. Some common conflicts include items like over booking of rooms and multiple schedule requests for the same date and time**.**

h. **Final arbiter of scheduling needs policy**: This policy should explain how a scheduling conflict between two or more courses is resolved and who has the final authority to resolve the dispute. This section should also explain how the center handles complaints from instructors or students.

i. **Severe weather policy**: Most simulation centers are affiliated with a medical center / hospital / college / university and should follow their department's policy for severe weather and/or unanticipated closures. In this section you should explain the process for simulation center staff, instructors and participants.

j. **Observation for non-participants:** Create a policy that addresses the observation of courses by non- participants. This would include tours and youth programs.

7. **Tours**

   a. **Requesting tours:** Tours require simulation facility time and resources. This policy should provide an overview to those requesting tours. This policy should include the process for scheduling and requesting tours, the contact person, and the specific areas that the person would like to visit. When placing a request for a tour, consider the visiting audience and their individual learning needs.

   b. **Tour requirements:** This policy should cover the specifics regarding each tour. Considerations should include time frames for tours, length, minimum and maximum numbers in each tour, and, depending upon the needs of the visitors, charging a nominal fee.

   c. **Tour cancellation**: This policy should state the tours must be cancelled within a certain time frame of the tour date. Consider the resources and needs of the individual center when determining this time frame.

8. **Equipment**

   a. **Loan policy:** Develop a policy statement describing who may borrow equipment, the type of equipment available for loan, the responsibility of the individual/department who is borrowing the equipment, the return policy, and any terms/fees that need to be included. In addition, a form should be created with a process of completion (name, contact information, pick-up date, return date, any special instructions regarding the loaned item, etc.) and a tracking system to follow-up on missing items. Some training on the equipment may be required prior to borrowing.

   b. **Standard center equipment:** Create a description of the basic equipment available for use at the center, how to access the equipment, how to use the equipment, and how to return the equipment. In some instances, the equipment (such as AV equipment) may require an orientation prior to use. If this is the case, you may want to consider a sign-off form to document that the user has been trained and understands the use of the equipment.

   c. **Acquisition policy and process:** Prepare a description on how users can request equipment (a form is likely required) for the simulation center. This may include a statement of need and rationale, and who may benefit from the acquisition. The policy should state how requests are prioritized and the decision making process for acquiring new equipment.

d. **Maintenance and care of equipment:** There may be one overall policy identifying the individual(s) who is/are responsible for the maintenance and care of the equipment, the frequency of the maintenance, including any warranty work. There should also be specific maintenance and care instructions for each different piece of equipment (e.g. what type of chemicals can and cannot be used, how to disassemble and reassemble). This may simply be the user guide that comes with the equipment, but it must be available for the user. Detailed records of PM and cleanings should be maintained.

e. **Breakage and repair policy (internal and external):** The policy needs to state the reporting procedure to alert the Operations Manager of the broken piece of equipment. A form may be used in this process that describes how the equipment broke, what was being done when the equipment broke. This information may be helpful in identifying patterns if equipment is breaking on a regular basis. The repair policy identifies who may responsible for the repair (e.g. warranty, maintenance agreement, personal responsibility). The personal responsibility comes in under your loan policy and the in-situ use as well.

f. **(Off-site utilization: in-situ versus in-facility use:** Develop a policy to outline facility usage. Depending on the facility, they may have two dedicated sets of equipment, one for in-situ and one for in-facility use. Either way, there needs to be an inventory of the equipment, supplies, and a regular maintenance check of the equipment.

9. **Supplies**

a. **Acquisition**: This section should state who is responsible for making sure that all supplies are available for a given course/session and when their availability needs to be confirmed. Depending on the individual facility, one may work directly with the hospital supply warehouse for supply acquisition. If supplies need to be purchased through an outside vendor, one month prior to its need is ideal. The amount of time from purchase to delivery can be lengthy. You should consider your local policies when establishing guidelines for ordering of supplies.

b. **Organization:** This section should discuss how supplies will be organized by the Simulation Center Operations Team with clear labeling and understanding of where items live. Organizing with the use of colors, letters or numbers with a map and clear descriptions is essential. Depending on courses/programs, disciplines may consider organizing supplies by course/program.

c. **Inventory:** This section should discuss that a quarterly inventory of supplies should be conducted and documented in a format that the facility and infrastructure supports. A database or excel spreadsheets organized by skills lab training or simulation sessions is an option.

d. **Budget Source**: Discuss funds, which come from participant lab fees, can be applied for off-setting the supply budget. When facilities are first starting, it is important to track costs to better understand the sustainability needs and expectations.

e. **Usage and Re-usage**: In simulation and skills sessions there are many items that can be reused. There should be a standardized description of what items will be reused and what items will be discarded. For example, one could reuse an IV flush; however, needles would be disposed of in the sharps container. *Note: It is also important to partner with your local hospitals and clinics to acquire supplies that are expired for patient use but can be used for training purposes. Sometimes meeting with your surplus partners will be a huge cost saver, which will help with sustainability considerations.*

10. **Scenarios**

   a. **Scenario development:** The Center should develop a standardized scenario template which may be used by course directors to develop simulation-based cases describing case presentation and narrative, pertinent patient history, chief complaint, appropriate student responses, etc.  Once completed, the scenario template may be used by the Center's simulation staff to program and prepare for the course.  It is strongly suggested that the simulation staff receive the completed scenario template no later than one month prior to the program.  Testing of Scenarios should be completed within one month of the actual course. This will allow for revisions and further testing.

   b. **Scenario structure:** The structure of the scenario template must encompass all aspects and pertinent physiologies of the patient, equipment, supplies, and necessary case information. Some recommendations include, but are not limited to:
      i. Case Title
      ii. Goals and Objectives
      iii. Patient Chief Complaint
      iv. Patient Information (name, age, gender, weight, height)
      v. Case Presentation (information given to the participant prior to the beginning of the case)
      vi. Vital Signs
      vii. Past Medical History
      viii. Medications

    ix.   Allergies
     x.   Events (actions taken by the participant)
    xi.   Result of Event (decrease in B/P, increase in HR etc.)
   xii.   Staff Needed
  xiii.   Equipment/props needed
  xiv.   Simulator type
   xv.   Environment

c. **Authorship:** The Center should develop a policy by which authors of a scenario are recognized based on their involvement with the development and implementation of the case.

d. **Audiovisual storage:** The Center should develop a policy that addresses the length of time that an audiovisual recording of the scenario is to be retained and/or preserved. These guidelines should take into consideration whether the recordings will be used during the course for debriefing or saved for future review and research. The policy should be standardized for all audiovisual recordings. It is recommended that the Center seek advice regarding this issue from legal counsel. Additionally, the Center should have a policy regarding confidentiality of the recording. Should the Center desire to allow others not involved in the case to view a recording, a written release should be obtained by the participants.

e. **Utilization of scenarios:** Develop a policy stating that it is the responsibility of the authors of the scenario and the Course Director to ensure the case follows current, acceptable standards of care and hospital policy. Resources used in the preparation of the scenario should be listed.

f. **Clinical quality assurance:** The Center should have a policy in place that ensures that each scenario continues to follow the current clinical standards of care. As these standards change, changes to the scenario need to be updated as well.

g. **Debriefing:** Develop criteria for debriefing. Debriefing is the most critical component of the simulation exercise. It is recommended that each Center should develop a standard process in which participants can reflect on their performance during the scenario and receive constructive feedback about their performance. Audiovisual technology and playback should also be considered as part of the debriefing process if feasible and available. In certain circumstances, the best instructors may not necessarily make the best debriefers. It is strongly recommended that those instructors involved with debriefings take a formal course on the structure and art of debriefing.

**11. Operations**

    **a. Utilization of Simulation center staff**
- i. Simulation center staff is there to support learning. Each staff member has specific roles. Any variation of use for that staff member must be approved by the appropriate center leadership. Unplanned events may lead to use of staff members and prevent intended work.

    **b. Start-up and shut down process:** The policies in this section should include step-by-step instructions for accessing the facility, disarming any security alarms, turning on and turning off every simulator model, audio/video recording and all other presentation equipment. The policies should specify what categories of users are qualified to "open up" the center and whose responsibility it is to shut everything down. Furthermore, it should be stated who is expected to clean up after simulation activities. It is very helpful to the users to include photos of the procedures and equipment as well.

    **c. Security of information:** This section should address where printed and digital information related to simulation activities should be stored and who will have access to the files. Specific policies should address storage of simulation scenarios, sign-in and attendance records, video records, equipment manuals, maintenance logs, and purchasing documentation.

    **d. Simulator maintenance:** A separate maintenance policy should be developed for each simulator. It should include daily, weekly, monthly, and yearly tasks related to keeping the simulator operational. Also, attached to each policy should be a maintenance checklist template. The policy should identify staff members who are responsible for performing each maintenance task.

    **e. Course supplies:** Supplies should be organized by the simulation center staff with clear labeling and understanding of where items are stored. Organizing with the use of colors, letters or numbers with a map and clear descriptions is essential. Depending on courses/programs, disciplines may consider organizing supplies by course/program. Ideally, each course should have a bin containing the necessary supplies and props. A policy should be in place to notify the person in charge of replenishing supplies when a particular item is depleted.
Vendor warranties can be voided if not followed appropriately. A policy to adhere to vendor warranties for PM of equipment should be included.

    **f. Course preparation:** For each course, a set of pre-course checklists should be developed that specify what tasks need to be accomplished and when. For example:
- i. 1 month before the course

1. Schedule the course
2. send out invitations
   ii. 1 week before the course
      1. confirm attendees
      2. confirm instructors
      3. confirm staff participants
   iii. 1-2 weeks before the course
      1. prepare paperwork
      2. check supplies
      3. remind participants
   iv. The day of the course
      1. configure simulator
      2. configure AV equipment and software
      3. configure environment
   v. The policies should state who is responsible for each task, either the simulation center staff or the client department.

g. **Course turnover:** Similar to course preparation, this section should include post-course checklists that specify what tasks need to be accomplished immediately after the course completion (e.g., shut down equipment, clean up, file paperwork) and what needs to be done later (e.g., follow-up surveys, CME/CE certificates).

h. **After-hours access:** This policy should state under what conditions access to the simulation center is allowed outside of regular business hours. The following questions should be addressed: What activities are allowed after hours? Whose approval is needed to allowed after-hours simulation? Who is allowed to conduct after-hours simulations? How are expectations for after-hours activities different from regular activities? What information needs to be recorded in a log? Room closures for maintenance can occur.

12. **Video Recording and Photo Release**

a. **Confidentiality:** Every participant in simulation and clinical learning must sign the video recording and photo release form. The policy should state the details of what the expectations of the facility are in terms of participation and to fully disclose how videos and photos will be used. The following information should be acquired and maintained for a determined period of time (if it is a student course, then his/her name and cohort information should be collected and maintained through date of graduation).

b. **Forms:** Forms should include the policy information needed for the topics noted below. These should be provided to participants before they are involved with their first simulation activity.

      i. Video/photo release (see detailed information below)
      ii. Confidentiality (see detailed information below)
      iii. Video reviewing policy (see detailed information below)

c. **Consent**: The Center should have a policy in place ensuring that each participant reviews the consent form and signs it at the appropriate time. As these standards change or if there are specific simulation projects, changes to the policy need to be updated.

d. **Video recording policy:** The Center should have a policy in place that ensures that each participant is aware of the recording policy determined for the varying simulation courses. The participant should be informed and sign it at the appropriate time. As these standards change or if there are specific simulation projects, changes to the policy need to be updated.

e. **Video distribution policy**: The Center should have a policy in place that clearly states when videos will be distributed. If the video will only be viewed after the fact by participants and instructors, this information should also be clearly stated.

f. **Video destruction:** The Center should have a policy in place that clearly defines if and when videos will be destroyed and deleted. This may vary depending on the level of the participants. For example, videos of students may be saved until successful graduation whereas clinician's videos may be immediately deleted. Participants should have a clear understanding of this process.

## 13. Course Observation

a. **Observation of simulation policy for course participants:** This policy should explain how and where course participants can observe simulation involving their peers. In particular, it is important to emphasize the confidentiality policy that protects participants from judgments and opinions of their performance. The participants should "pledge" not to discuss each other's performance in simulation scenarios outside of the simulation center. Another reason for the confidentiality pledge is to ensure that participants do not divulge scenario information to other participants.

b. **Observation policy for non‑participants:** This section should describe the procedures to be followed for the protection of the students, instructors, and staff. Who is allowed to approve observation by non-participants? Is it the Center Director or course instructors, or both? How far in advance must the request for observation be made? Under what conditions are the observers allowed to take still pictures or video? Are observers allowed into the control room? Who is permitted in the

debriefing room? Are observers allowed to interact with simulation staff and participants?

c. **Required disclaimers and pre-event statements:** Observers need to be informed of confidentiality expectations. Just like students are expected to pledge confidentiality, so too should the instructors. Simulation staff should pledge not to divulge information on students' performances outside of the center. This should include a non-simulation center staff (including tour participants, visitors and students).

d. **Required event or course acknowledgements:** This section should include any sponsorship information or an explanation that simulation is a teaching tool, not a testing tool (if appropriate). Also, the Center might state that taking a simulation course does not necessarily translate into achieving competency in the clinical arena.

## 14. Fiscal

a. **Fee Structure for use (internal and external use):** It is critical to establish a pricing structure for internal and external users of the center. This is an opportunity for the center to have additional income. Internal users are typically given a lower rate for the use of the center because they have supplied the initial backing for the facility or are the primary users of the center. External users can be charged at a rate that the market will bear, depending on the geographical location of the simulation center.

b. **Required reporting, (type and frequency) and to whom**: Each simulation center is typically required to provide some sort of report to either the governing body of the simulation center or the department/hospital where the center resides. This report may be something simple, such as how many days the center is used, or a breakdown of how much each user group used the facility and what courses are run there. It is important to ensure that accurate and detailed records are kept of the financial undertakings of the center, as well as the use of the facility from the beginning.

c. **Annual budget reporting requirements:** The budget is one of the most fundamental infrastructure documents of a simulation center. Each center has different requirements that they must provide, and this is where that information would be placed. Everything from staffing requirements to projected direct/indirect costs to confirmed or potential income for the upcoming fiscal year should be included.

d. **Required fiscal year end documentation**: In this section, a list of year end documentation that must be reported should be listed. Examples are

purchases that were made for the year, income for the year, and any other fiscal documents that are needed to report to the stakeholders of the simulation center.

e. **Purchase and acquisition procedure**: Establish a policy to outline the procedures for purchasing and other acquisitions of which the simulation center is a part of.

f. **Reimbursement process**: Develop a policy to describe reimbursement protocols. Unless the center is an independent center, reimbursement for expenses falls under the policy of the institution that hosts the simulation center.

g. **Financial accounting**: This section includes all the reports needed by the simulation center so that all staff, as well as primary stakeholders know where the financial information is located.

h. **Conflict of Interest**: Develop a policy to discuss any "conflict of interest" issue for instructors. You should also prepare a legal document to support your center's conflict of interest protocol. You may be able to find this within your parent organization.

i. **Purchasing equipment**: Purchasing equipment is a major expense in operating a simulation center. In this section, the proper steps for requesting the purchase of a piece of equipment and the actual process that is involved with purchasing equipment would be done here.

j. **Purchasing approval process:** Develop a policy to describe your purchasing options for personnel. Some purchases are approved at the administrative level where as some are required to have much higher approval. Include processes that are needed for any purchase and provide details on what the approval steps are, as well as what can be done in case a purchase has been denied.

k. **Payroll**: In this section key payroll contacts should be indicated as well as what the employee payroll process.

## 15. Courses

a. **Course approval process:** In this section you should describe, in detail, the process for course approval. Each course delivered at your center should be approved by the appropriate personnel and be routed through an approval process. Most courses need to meet the following criteria: funding available (who will pay for course development or course facilitation), makes sense (medically), meets the mission of the simulation center, can be performed within the simulation center or in-situ.

Additionally, you have consider how to purchase supplies and/or equipment needed to manage the course.

b. **Funding and course financials:** All courses cost money to develop and deliver. Your center should create a course development form for use by administrative personnel, as well as for sharing this information with the potential user. This form should include: supplies, development time, and actual time in the center. Administrative considerations such as copies, binders, catering, and other incidental expenses must also be addressed.

c. **Mandatory elements of a course** In this section you should describe your key elements of a course and what is expected for each element. The example below shows a set of core elements for a course. Once you have decided what elements are needed, you should explain them in further detail.
  i. Course Description
  ii. Course Objectives (Learning Objectives)
  iii. Target Audience
  iv. Pre-course Material (Prerequisites)
  v. Day of course content
  vi. Post course content

d. **CME / CE Policy / Process:** Based on your center's mission, develop a policy for obtaining CME /CE's for courses. You should also establish a process for obtaining these credits and establish a relationship the CME department.

## 16. Remediation

a. **General remediation policy:** If simulation is used for remediation in a given Center, then participants should be aware of their involvement from the beginning. The Center should have a policy in place that explains the process of remediation training.

b. **Policy for instructors:** If simulation is used for remediation in a given Center, then instructors need to be aware of it and consistent with its use. Ideally, a simulation expert should work with instructors to determine if simulation is the best route for a remediation.

c. **Policy for participants:** If simulation is used for remediation in a given Center, then participants should have the information and access to the policy at their first simulation encounter and at any time in the future.

d. **Documentation:** If simulation is used for remediation in a given Center, then a standard form should be created for documentation and keeping track of the dates and details of the events that led up to the remediation

and the remediation itself.

e. **Ethical guidelines:** If simulation is used for remediation in a given Center, then participants should be aware of that from the beginning. The Center should have a policy in place that clearly states if this will affect their current or future employment.

## 17. Customer Relations

a. **Dispute resolution:** This policy should explain how a dispute is processed and resolved at the center and who has the final authority regarding the dispute. This section should also explain how the center manages complaints from instructors or students.

b. **Marketing of center:** This section should specify:
   i. Who is allowed to initiate customer (client) solicitation? What are the differences between approaching an internal customer (within the institution) and an external customer (outside the institution)?
   ii. Through what channels can the services of the center be promoted?

c. **Policy on use of center's name:** The policy should state the official name of the center and its acronym to be used in all communications and publications. It might also be helpful to list names and acronyms that should NOT be used. If the center has a word mark, logo, seal or color motif, they should also be identified in this section.

d. **Web usage:** This section should describe:
   i. What information belongs on the Center website? Who decides?
   ii. Who is in charge of updating content on the website?
   iii. Who is responsible for replying to web requests

e. **Information dissemination:** This section should explain through what channels information about Center services is disseminated (such as printed materials, web, and e-mail); and if information is disseminated to wide audience, whose approval is needed? Data base of users and visitors would assist in the deliver of information.

f. **Official media policy:** Prepare a policy regarding how your center will work with or respond to various media outlets. Normally, the simulation center works with the PR department of its parent institution. Therefore, the following questions should be addressed in the policy:
   i. What is the procedure for media requests?
   ii. Who is authorized to talk to the media?
   iii. What activities are members of the media allowed to observe?

**18. Travel and Meeting Attendance**

    a. **Meetings:** This section should specify under what conditions a staff member could travel to attend a meeting, describe the approval process, and list the pre- and post-meeting expectations. In some centers, it may be necessary to state how many meetings per year an employee can attend and how many people can be away from the center at the same time.

    b. **Reimbursement policy:** The reimbursement policy is usually the same as the university or health system in which the simulation center resides.

    c. **Covered expenses:** Create a policy to outline how your center will cover expenses. Expenses that are typically covered are meals (usually a max per diem has been determined), air fare, hotel, rental car/taxi/transit, mileage, parking, and purchases that may be needed for meeting (i.e. copies, abstract poster).

    d. **Priority scheduling in case of conflict:** If an individual is to attend a meeting and a conflict has arisen at simulation center, the director of the center should determine if the conflict is a higher priority than the meeting.

**19. Research**

    a. **IRB policy:** This policy should discuss how researchers should follow the Internal Research Board policies within their organizations. All expected paperwork and timelines will be followed per protocol.

    b. **General guidelines if different from institutions:** This policy should discuss how learners/participants must have informed consent for involvement in research. There are specific institutional guidelines that must be followed.

    c. **Security:** This policy should discuss how researchers should follow the security guidelines outlined in the review process for both hard copy check lists and also for other research data collected. Any videos used in research will be kept locked and confidential per institutional protocol.

    d. **Fiscal impact:** This policy should discuss how principal investigators need to partner with simulation teams within their institutions to better understand the resources that are needed to conduct simulation-focused research. It is important to allocate staff, facility, and equipment resources to achieve the research goals.

e. **Publication policy:** This policy should discuss how individuals involved with the simulation research will publish their findings, as a group, within a year of completion of the funding component of the project. It is important to include the names of the team members that participated in implementing the simulation sessions in the publications.

f. **Authorship rules:** This policy should discuss how authors will be accurately cited for involvement with simulation research. Discussion and agreements about first author will be driven by the Principal Investigator or Project Manager of a given research project.

g. **Data collection responsibility**: This policy should discuss how data collection responsibility will be determined by the Principal Investigator (PI) in collaboration with the Simulation Team. Ultimately it will be the responsibility of the PI to insure that the data is being collected accurately and according to protocol.

20. **Safety and Security**

a. **Emergencies**
   i. <u>Medical:</u> Create a policy that states who to contact in case of an emergency (e.g. 911 or "0"). What type of documentation is required after the event is stabilized?
   ii. <u>Non-Medical</u>: Create a statement regarding how to manage non-medical emergencies (e.g. Are faculty/staff able to manage these instances; What type of reporting is required?).
   iii. <u>AED locations:</u> Prepare a statement and drawing of where the AEDs are located in the simulation center.

b. **Identification badges:** Develop a policy on badge requirements for students, faculty, guests, staff, etc. within the simulation center. In some cases, access into the simulation center is only by badge.

21. **Bio hazardous Material**

a. **Authorization for Use**
   i. You should adhere to local policies and building policies on the use of materials deemed hazardous.

b. **Preparation**
   i. Develop a policy on the proper preparation of the site (rooms) and the participant and instructors. State how and what a person should do to get rooms ready for use and what should be done in case of an emergency.

**c. Removal**

    i. Create a policy on the proper removal of the material. It should include numbers to call for removal agencies.  Additionally, this policy should include information on what instructors and participants should do with their materials (gowns, masks, etc.) when they have concluded their simulation activities.

**d. Cleaning**

    i. Create a policy on what to clean and how to clean it. You should also include the storage and disposal information of cleaning materials.