Academic Pharmacy Unit

Standard Operating Procedure for the Recruitment of 'Expert Patients' for Pharmacy Education (PAT scheme)

2016
Appendix 6: Patient Risk Assessment Form

Appendix 2 – Expert Patient Re-Consent Letter

Appendix 1c: THE UNIVERSITY OF SUSSEX Consent to participate in Pharmacy Objective Structured Clinical Examination (OSCEs) and/or Patient As Teacher scheme

Appendix 1b: Objective Structured Clinical Examination (OSCEs) and/or Patient As Teacher scheme in Clinical Workshops

Appendix 1a: Information for Patient as Teacher scheme in Clinical Workshops

References and Supporting Documents

Explanation of terms

Arrangements for the Patient Volunteer visit

Expert Patient Reimbursement

Procedure for Recruitment of expert patients

Risk assessment

Storage of expert patient data

Expert Patient Scheme and OSCEs

Clinical Workshops

Patient as Teacher scheme and OSCEs

Scope of expert patient involvement covered by this document

Section 2: Patients as Teachers Scheme Sessions

Section 1: OSCEs

Background/Scope/Definitions

Key Practice Points

Who should read this document?

Table of Contents

Standard Operating Procedure for Recruitment of ‘Expert Patients’ for Pharmacy Education
Who should read this document?
1. Pharmacy Staff, Clinical Skills Tutors and other healthcare professionals involved in the recruitment of ‘expert patients’ to attend and participate in specific pharmacy education activities.
2. Administrative staff in the Life Sciences Pharmacy Education Unit

Key Practice Points
1. Recruitment shall be by a qualified healthcare professional
2. The healthcare professional is responsible for risk-assessing the suitability of the expert patient
3. The expert patient shall be provided with verbal and approved written information about the educational activity that enables them to give their informed consent to participation
4. Written consent must be obtained for participation in the educational activities described in this document, using the appropriate consent forms (attached as appendices to this document)
5. The Pharmacy Education unit is responsible for retaining records of expert patient participation in pharmacy education

Background/Scope/Definitions
Patients attending a hospital or clinic are often asked if they would consent to students being present during various aspects of their care. This sort of patient participation in education is invaluable and without it, training of pharmacy undergraduates would be difficult. However, under certain circumstances, patients may also be asked to contribute to specific pharmacy educational activities. This document outlines the procedures in place to facilitate this process.

Scope of expert patient involvement covered by this document
Expert Patients are utilised in four main ways to support pharmacy education

1) Expert patient discussions concerning their conditions
2) Clinical workshops involving patient encounters
3) Simulations involving response to symptoms of minor ailments
4) OSCEs

Procedure for Recruitment of expert patients

Patient as Teacher scheme and OSCEs
Recruitment of expert patients for patient encounters and Objective Structured Clinical Examinations (OSCEs) follow the same procedure.

Responsibility for recruiting patients for teaching sessions and examinations:

1. The Academic Pharmacist should recruit the Expert Patients and provide
them with information concerning the educational activity or OSCE. This information may be verbal but should also include the standard information sheets (Appendix 1a and 1c).

2. Once the expert patient has consented to taking part in the educational activity, the patient recruitment form (Appendix 2) should be completed and passed on to the Pharmacy Practice Experience Coordinator. Written consent may also be obtained at this stage using the standard consent form (Appendix 3), or the patient may verbally consent and complete the written consent form later.

3. The Pharmacy Practice Experience Coordinator will contact the patient to provide written information where not already provided (Appendix 1a and 1c) and obtain written consent (Appendix 3), if not already done. S/He will also inform the patient concerning when they will be required to help with training or examination. This will not be a contractual agreement but an ad-hoc arrangement.

**Clinical Workshops**

Recruitment of expert patients for clinical workshops is the responsibility of the Academic Pharmacist. Patient information sheets will be sent out to patients recruited for the clinical workshops.

**Risk assessment**

It is the responsibility of the recruiting Academic Pharmacist to risk assess the patient:

- The patient should be well enough to attend the educational/examination session
- If the patient has mobility difficulties the Pharmacy Team needs to be informed so that the patient can have suitable transport arranged and be met and escorted back to the transport.
- Patients attending OSCE exams are additionally risk assessed on the day of the exams by a member of the examination team. The Patient Risk Assessment Form (Appendix 6) will be used to record this information.

**Storage of expert patient data**

The Pharmacy Team stores the following information for all patient volunteers attending expert patient educational sessions and examinations:

Name, DOB, contact details and a brief description of their clinical signs and symptoms. A secure, password protected database is used, accessible by a limited number of staff. The Practice Experience Coordinator stores consent forms securely.

Expert patients on the database are annually invited by the Practice Experience Coordinator to renew their consent to assist with training & examination sessions (Appendix 4a & 4b).
Expert Patient Reimbursement
Expert Patients are reimbursed for any transport costs and are also paid an honorarium for the help they provide with the PAT scheme. This is currently £xx per day.

Arrangements for the Patient Volunteer visit
The following arrangements will apply to all patient volunteers attending the undergraduate pharmacy education sessions:

- Names of expert patients should be left with the Practice Experience Coordinator in advance of teaching/examination sessions
- The Practice Experience Coordinator and responsible academic faculty must receive and sign in all patients
- The Practice Experience Coordinator should meet any patient volunteers with mobility difficulties when dropped off by transport and escort them to the teaching venue and back to their transport at the end of the session
- Patient volunteers should be asked if they require refreshments and given cups or mugs (not paper cups) a table should be close to hand
- Patient should be escorted to the pharmaceutical care centre and asked to remain there
- Patient volunteers who are recruited for OSCEs will be asked for a brief outline of their medication & condition. The examination team will complete a risk assessment form for each expert patient (Appendix 6). These will be examined by the OSCE examiner prior to the start of the exam
- The Practice Experience Coordinator will organize reimbursement for patients
- The Practice Experience Coordinator should ensure that the patient’s transport has arrived and that the patient has left the building.
- In the event of a Fire or Major incident, the Practice Experience Coordinator or responsible faculty should ensure that the patient is escorted to the evacuation point
- In the event of a patient collapsing, emergency services will be called and first aid offered
Explanation of terms
• OSCE - Objective Structured Clinical Examinations

References and Supporting Documents
• Patient & Public Involvement in Medical Education Policy:
  https://www.ucl.ac.uk/medicalschool/quality/monitoring/Berlin_Seymour_Johnson_Cupit_2011_PPI.pdf

Roles and responsibilities:

Practice experience academic lead will oversee all activities and will be supported by Registered Pharmacy technician, registered academic pharmacists and clinical preceptors. The practice experience administrator will oversee all administrative duties as required.

Administrative duties will include:

• Administrator responsible for contacting patients with administrative and patients information
• Administrator responsible for “clerking in” patients
• Administrator processing for reimbursing patients
• Administrator responsible for patients’ refreshments
• Administrator responsible for organization of patient transport and parking
• Administrator responsible for any emergencies
Appendix 1a: Information for Patient as Teacher scheme in Clinical Workshops

Background
The University of Sussex Pharmacy course aims to train students to the highest possible standards of patient care. Some teaching occurs in traditional lecture format but in order to prepare students for future practice, it is essential that students' learning involve patients and the public. The Patient as Teacher (PAT) scheme was developed to facilitate this concept.

Gathering patient information is a vital part of the training of future pharmacists who face a changing role in patient care. Students are expected to observe and participate in clinical workshops and other patient encounters involving consultations, to support the development of the knowledge and skills required to successfully progress through the course and attain the competencies expected of MPharm graduates.

The Patient as Teacher (PAT) scheme enables us to run a series of patient encounters in our clinical skills suite. This involves a group of pharmacy students meeting a patient to learn about their condition and how to carry out simple consultations involving information gathering, developing their communication skills. An academic pharmacist is responsible for all sessions involving patients and students.

Why have I been approached?
We need volunteers who either have a long-term condition or are willing members of the public, with whom pharmacists have regular contact in the course of their daily practice.

What happens if I agree?
You will be asked to complete the consent form included with this document. Please post back to us in the attached pre-paid envelope.
In advance of the 1st session, you will be contacted by a member of our team to arrange any transport that is required and to answer any questions that you may have. Furthermore, you would be invited to attend a two-hour session during which you are asked questions about your clinical condition and any medicines that you may be on, both prescribed and purchased over the counter, from a pharmacy. We greatly value your input so we will reimburse any travel and parking expenses and will pay you £xx for your time.

What happens to my personal information?
Patient confidentiality and dignity is respected at all times. All discussions are strictly confidential. Your details (name & contact details) are stored on a secure database that only approved staff can access. Please note that you can request that your details be removed from the database at any time. Once a year you will be contacted and specifically asked if you would like to remain in the PAT scheme.
The responsible academic pharmacist will be present in all clinical encounters with students and patients to observe the consultation process. During the process of student consultations, all patient information will be anonymized. If at any time you would prefer not to participate, please let the Academic Pharmacist know.

Should you have any further questions, please contact Alex Ralston on Phone: 01273 873156 or by email: A.Ralston@sussex.ac.uk
Appendix 1b: Objective Structured Clinical Examination (OSCEs)

Background
This examination is a very important part of our training of future pharmacists to acquire and demonstrate the highest possible standards of patient care. It enables an objective assessment of students’ knowledge and clinical skills. Utilising members of the public in the examination provides an opportunity to assess the effectiveness of their communication skills with ‘real’ patients, checking that they do so in a polite, courteous and accurate way. It is because of people like you taking part in the exams that we are able to do this and your participation is very much appreciated.

Why have I been approached?
We need volunteers who either have a long-term condition or are willing members of the public, with whom pharmacists have regular contact in the course of their daily practice.

What will happen if I agree?
It would mean you contributing either a half-day (morning or afternoon), or a whole day of your time, it is up to you.

Before of the exam, the practice experience coordinator will contact you. S/he will be happy to answer any questions you might have and if you decide to help out, will arrange transport for you to and from your home on the day of the exam.

On the day of the examination, you will be briefed concerning what the examination entails. If you feel uncomfortable with anything about the exam on the day, the responsible pharmacist will do everything they s/he can to solve any problems and make it as easy and simple for you as possible.

In the sessions, you will see a number of pharmacy students one at a time. During the OSCE, students may ask you questions based upon your clinical condition and medicines being taken. For example, each student may interview you about your condition or provide advice about a prescribed medicine or device. Each student will be with you for no more than ten minutes at a time.
We expect the student to be sensitive to your feelings and to treat you with care and respect. If you are concerned about a student’s attitude please speak to a member of staff.

You are free to withdraw from the examination at any time with no need for explanation.

We value your time and assistance in running the exam and will pay you £xx.00 or £xx for attending one session ( £xx for the entire day of 2 sessions), plus any travel expenses for the inconvenience.
What happens to my personal information?
Patient confidentiality and dignity is respected at all times. All discussions are strictly confidential. Your details (name & contact details) are stored on a secure database that only approved staff can access. Please note that you can request that your details be removed from the database at any time. Once a year you will be contacted and specifically asked if you would like to remain in the scheme. The responsible academic pharmacist will be present in all clinical encounters with students and patients to observe the consultation process. If at any time you would prefer not to participate, please let the Academic Pharmacist know.

Should you have any further questions, please contact Alex Ralston on Phone: 01273 873156 or by email: A.Ralston@sussex.ac.uk
Appendix 1c: THE UNIVERSITY OF SUSSEX Consent to participate in Pharmacy Objective Structured Clinical Examination (OSCEs) and/or Patient As Teacher scheme

Please enter your initials in the boxes next to the statements that apply and sign the bottom of the form

Section 1: OSCEs

☐ I agree to take part in University of Sussex Pharmacy OSCEs

☐ I confirm that the procedure for this examination has been explained to me and that I have read and understood the attached sheet “Information for Patients Participating in University of Sussex Pharmacy Undergraduate education Year [2016/2017] Objective Structured Clinical Examination (OSCE)”, including the section relating to the Data Protection Act 1998

☐ I am willing to take part in this or future University of Sussex Pharmacy Clinical OSCE examinations

Section 2: Patients as Teachers Scheme Sessions

☐ I agree to take part in the PAT scheme

☐ I confirm that the procedure for this has been explained to me and that I have read and understood the attached sheet “Information for patients participating in the Sussex Pharmacy PAT scheme

Section 3: Data storage

☐ I give permission for my details to be held securely in a database at University of Sussex

☐ I give permission for my details to be held securely in a database at University of Sussex for the purpose of OSCEs

☐ I agree to be contacted by post on a yearly basis to give my consent to remain on the database or to withdraw my consent

☐ I understand that I can withdraw my consent at any time

Full Name: ............................................ Signature: ............................................
Date of Birth: ..............................
Date: ..............................
I have explained the procedure for this examination to the patient who understands the nature of the OSCE Examination and/or teaching and his/her involvement

Name of staff: ....................................... Signature: ..........................
Date:........................................... Telephone number(s):.................................

Please read the statement below before signing the attached form.

**The Data Protection Act 1998**
The University of Sussex is a data controller and is registered with the Information Commissioner's Office as required by the Data Protection Act 1998. The Sussex Pharmacy team requires the information collected on the attached form in order to record details of participants in the OSCE and to contact you to participate in future OSCEs if you have indicated your willingness to do so. The University of Sussex will only process your personal data in accordance with the University's notification and in line with data protection legislation. By signing the attached form you agree that the Sussex Pharmacy academic team can use the personal details contained therein for these reasons as necessary.
Appendix 2 – Expert Patient Re-Consent Letter

University of Sussex
School of Life Sciences
University of Sussex
Falmer
East Sussex, BN1 9QG

Date: As Postmark
Dear

Undergraduate Pharmacy Education
Undergraduate Teaching Database – 20--

We note that your details remain on our Patient as Teacher database as an expert patient for educational activities & OSCE examinations.

We are currently updating our files and reviewing the forthcoming Academic Year 20XX/20XX and we would be most grateful if you could complete the attached form and return it to us as quickly as possible in the freepost envelope provided.

To summarise:
The University of Sussex Pharmacy academic unit aims to train its students to provide the highest possible standards of patient care. As part of their training, our pharmacy students undergo educational activities and examinations involving expert patients under the Patient as Teacher (PAT) scheme. This is to ensure that they develop clinical skills that support safe practice. Under the PAT scheme, patients take part in encounters with students as well as in clinical examinations called OSCEs. This involves your coming to the University on a set date, and meeting a number of pharmacy students who will undertake a short interview with you concerning your medical condition and medicines being taken. A responsible academic pharmacist will be present at all times during your consultation. If you agree to participate in these sessions, please sign and return the form.

As a token of our appreciation for your time and assistance with the teaching/OSCE session, you will be paid £xx.00 for attending up to a half-day session, plus any travel and car parking expenses which you may incur.

We are hoping that you will continue to participate in future PAT educational activities and examinations and will register your contact details today.
Yours sincerely,
Mr xxxx Patient Recruitment/Expert Patients Administrator
Tel: Email:
Appendix 3- Patient Re-Consent Form: Pertaining to Academic Year 20XX/20XX
This is the information that we currently hold for you on our patients’
database; please make any amendments necessary so we can accurately
update our records.

Name:
Address:
Date of Birth:
Home/Mobile Tel No:

Please delete as applicable.

I am *willing / *not willing to take part in future Patient as Teacher Scheme
encounters

I am *willing / *not willing to take part in future OSCE sessions.

Please remove my details from the database (by removing your details from
our database, you will not be contacted again).

Signature: _________________________ Date:_______________________

Please sign & date your consent form and return in the prepaid envelope
provided
Appendix 4a: Information Sheet for Pharmacy Education Video Recordings

Introduction

Thank you for considering helping us with this educational project.

Why are we asking for your help?

The quality of care that you receive depends on the previous good training of your health care team. One of the best ways of teaching student pharmacists is to show them real patients or, when that isn’t possible, to show them a recording of a patient. Your consent for this recording will contribute to even better training in the future.

What is this recording and why are we making it?

The word “recording” is the name given to still images and/or recordings, either sound or video. Recordings are digital so that they can be stored and used over a network of computers for learning and teaching. They can be easily copied and (with the relevant patient permission) shared in a digital repository or on the Internet. In such circumstances it may be difficult for the recording to be removed if patient permission was withdrawn at a later date and you will need to bear this in mind when deciding what level of permission (if any) you wish to give.

Confidentiality and Privacy

Wherever possible you can choose to be/not be identifiable in the recordings. However, for particular learning and teaching purposes, some recordings of people may need to be recognisable. We will tell you whether or not your recordings will need to be recognisable in the final material.

Your personal data will not be disclosed.

Where will they be stored?

The recordings will be stored securely in the clinical skills suite in the Sussex Pharmacy at University of Sussex.

Who will have access to the recordings?

The recordings are of such value for the education of Pharmacy students and other health care workers that it is important to make them as widely available as possible. However, the way the recordings will be used depends on the level of consent you give. You may choose to grant use of the recordings in a number of ways:

1) for lecture presentations given to students and healthcare professionals

2) to be indefinitely used on the University of Sussex Website. Students and healthcare professionals may access this video using a secure username and password
3) for use as an online educational resource, made by the University of Sussex but freely available to all. If you give permission for the recording to be used in this way it may mean that removal of the recordings from the public domain may not be guaranteed if you later wished to withdraw your permission.

We will only ever use your recordings according to what you agree at the time you sign the consent form. If we later want to use them in a different way we will contact you for further permission.

**Is anyone making any money out of this?**

The images are used for educational purposes on a not-for-profit basis.

**Important assurances**

You are entirely free to choose whether or not to consent. If you do not wish to give your consent, you do not have to give a reason. Choosing not to participate will not affect your medical care, either now or in the future.

**What if I change my mind?**

Sometimes patients who have given their consent become concerned afterwards and wish to change their mind. Should you do this, we would destroy all copies of the images that are under our control. However if you have given permission for the recordings to be openly available for learning and teaching purposes some of the recordings may have already been distributed elsewhere and it may not then be possible to trace and remove all of these.

**If I agree, what happens next?**

Having read this information sheet, please feel free to ask any questions of us, or your doctor. We will then explain the practical arrangements for making the recordings. Please feel free to ask any questions about these as well.

If you are willing to grant your consent, we will ask you to sign a Consent Form to say that:

- You have understood this information
- You are willing to give your consent for the taking and use of the recording along the lines described.

**Further information**

If you think of any further questions afterwards, please feel free to contact:

(the person who is seeking consent)

Alex Ralston
Tel: 01273 873156
email: A.Ralston@sussex.ac.uk
Yearly, there are four OCSE sessions and multiple Clinical skills sessions performed.
Each OCSE programme requires the involvement of actual patients, simulated patients and student volunteers to support/deliver the examination process. We will inform the patient as teachers when and how these sessions will take place.
Appendix 5b: Consent for Pharmacy Education Video recording

I have read the accompanying information sheet ‘information sheet for education video recordings’ and had the opportunity to ask questions

1. I, ................................................. agree to a video recording being made of:

..........................................................................................................................
..........................................................................................................................
..........................................................................................................................
..........................................................................................................................
..........................................................................................................................

for the purpose of teaching healthcare professionals and students

Initials ..................

2. I agree to the recording being used in lecture presentations to healthcare professionals and students

Initials ..................

3. I agree to the recording being stored indefinitely on the University of Sussex Website. Students and healthcare professionals may access this video using a secure username and password

Initial ..................

4. I agree to the recording being used in an online educational resource, made by the University of Sussex, but freely available to all

Name:........................................
..............................................Signature:........................................

Date: ........................................

Name of person taking consent: ........................................
Signature:........................................

Role: ........................................... Date: ...........................................
## Appendix 6: Patient Risk Assessment Form

### Patient Risk Assessment Form

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Phone</th>
<th>Hospital no</th>
<th>DOB</th>
</tr>
</thead>
</table>

Next of kin/Contact details:

<table>
<thead>
<tr>
<th>Date/ Time arrived:</th>
<th>Date/ Time left</th>
</tr>
</thead>
</table>

Department:

<table>
<thead>
<tr>
<th>Mobility</th>
<th>Mobile</th>
<th>Requires assistance</th>
<th>Wheelchair user</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Oxygen</th>
<th>Required</th>
<th>Not required</th>
<th>Nebuliser user (required)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Medical Condition(s)</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

If yes, perform Blood Glucose

<table>
<thead>
<tr>
<th>Diabetes</th>
<th>Pre-session</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablets</td>
<td></td>
</tr>
<tr>
<td>Insulin</td>
<td>Post session</td>
</tr>
<tr>
<td>Diet</td>
<td></td>
</tr>
</tbody>
</table>

Taken all prescribed medication | YES | NO |

Any other special requirements? | YES | NO | Please note |
I confirm that this patient has agreed to take part in this exam/Session.

<table>
<thead>
<tr>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>Designation</td>
</tr>
<tr>
<td>Name</td>
<td>Date</td>
</tr>
</tbody>
</table>

Patient
Signature
Patient Name

Patient dietary or treatments.
EMERGENCY PROCEDURE POLICY
Pharmacy Education

Policy Statement
This written policy document aims to identify emergency procedures and responsibilities for staff-members concerned with the provision of Pharmacy Education within the University of Sussex, should a medical emergency occur.

Key contact personnel:

<table>
<thead>
<tr>
<th>Title</th>
<th>Name</th>
<th>Contact No</th>
<th>Mobile No</th>
<th>Pager/Bleep</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Location
The Clinical Skills Suite is situated on the second floor of the JMS Building

Operation
The Patient as Teacher scheme supports pharmacy education through students’ development of clinical skills required for practice utilising expert patients. Throughout the academic year (October -June), expert patients will engage with educational activities to support student learning. The pharmacy team is responsible for the expert patients when they are in the school.