

# Enhancing OT education: the role of Peer Support Workers as Standardized Patients in Pre-clinical Workshop



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## Involving Peer Support Workers in Simulation to prepare OT students for Placement

# Content



### WHY

Background of the Project



### WHAT DID WE DO?

The Project Journey & Details



### HOW'S GOING?

Learning Outcomes



### CONCLUSION



## Why – the Background



Gap

Gap between academic education and clinical placement is frequently observed in healthcare education

In PolyU OT curriculum, at least **one-third** of long placement is in **psychiatry** (PSY) specialty. Students often develop anxiety prior to mental health placement (Gough & Happell, 2009; Grav, Juul & Hellzen, 2010),

**Students' anxiety towards PSY placement**



**Limited exposure & contact**

Limited exposure and contact with this patient group may account for the anxiety (Wang et al., 2021)

The student participants felt that psychiatry is more difficult than physical blocks due to lack of a “recipe” (Soeker, 2014)

**“The abstract nature of psychiatry”**





# Involving Peer Support Workers in Simulation to prepare OT students for Placement

SPs are individuals who are trained to demonstrate a patient in a reliable way. Involving SPs in simulated learning fills the gap between education & fieldwork in OT education (James, 2001).

Improved students' **learning outcomes** (Keranen et al., 2023; meta-analysis), **skills** & **performance** (Battle et al., 2015)



## Benefit of Simulation with Standardized Patients



## Peer Support Workers

potential candidates as standardized patients

PSWs are individuals with lived experience of mental health recovery who are trained to support current PIRs & their carers.

In Hong Kong, PSWs has been employed in public hospitals and community settings **>10 years ago**



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## Our Journey



Jun to Aug  
2024



Sept 2024  
to Jan 2025



Dec 2025 to  
Dec 2026



Jan 2025 to  
Jan 2026

### PSWs and OT recruitment

Supported by Department T&L Seed Fund

**3 PSWs** (part-time) with >8 years work experience AND **3 OTs** with >7 years clinical experience

### Training to PSWs

Each OT partnered with one PSW

#### 4 training sessions

- \*understand recovery stories
- \*identify & prepare case scenarios
- \*role play

### Student & CE Workbook

**Notes to Teaching Staff**

Simulation 1 (Pre-brief Question)

**(Key questions)**

- What is the primary purpose of the initial interview in psychiatric occupational therapy practice?
- What are your specific objectives for this session?
- How will you set up the environment and position yourself to ensure safety (e.g. tools) and effective communication (e.g. SOLER model (Sit squarely, Open posture, Lean in, Eye contact, Relax))?
- How will you use the MHO framework (motivation, habituation, performance capacity, environment) to guide your assessment and understanding of the patient?
- How will you explore the patient's volition (motivation, interests, values) during the interview?
- What questions will you ask to understand the patient's habituation (daily routines, roles, habits)?
- How will you assess the patient's performance capacity (physical and mental abilities affecting occupational performance)?
- In what ways will you consider the patient's environment (physical, social, cultural) and its impact on their occupational participation?
- Based on the information from clinical notes, which occupation (self care, work, leisure) do you anticipate would be the focus of the patient? And which aspects (volition, habituation, performance capacity, environment) may affect the occupational performance and participation?
- What open-ended questions might you use to facilitate exploration?
- How will you structure the interview to ensure you address the MHO and relevant MHO domains?
- How will you ensure the practice of empathy and non-judgemental?

**(Additional questions to consider)**

- What potential challenges or difficult topics (e.g., suicidal ideation) might arise, and how will you address them?
- What steps will you take if the patient becomes distressed or uncooperative?
- What would you do if the patient suddenly disengages, becomes agitated, or refuses to continue the interview?

### Implement Pre-Clinical Workshop

#### 3 cohort of Final Year Students

2021 cohort BScOT, 2022 cohort BScOT, 23/24 cohort MOT

**3 PSWs & 3 OTs**



# Three Case Scenarios



E

*Dx: Depression*

*Recovery goal & illness mx*

Suicidal attempt & admitted to hospital

First known to MHS

Discharge to hostel, felt loss and hopeless



KY

*Dx: Schizophrenia*

*Vocational goal &*

*Work rehab*

With residual psychotic symptoms

Struggle towards work goal



B

*Dx: Psychosis,*

*Social Cognitive Intervention*

Social cognitive deficit limiting

social and occupational

participation



## The Student



**Final Year Students**



**Before their 7-week PSY placement**



**Professional image**

Uniform, wear name badge, be punctual



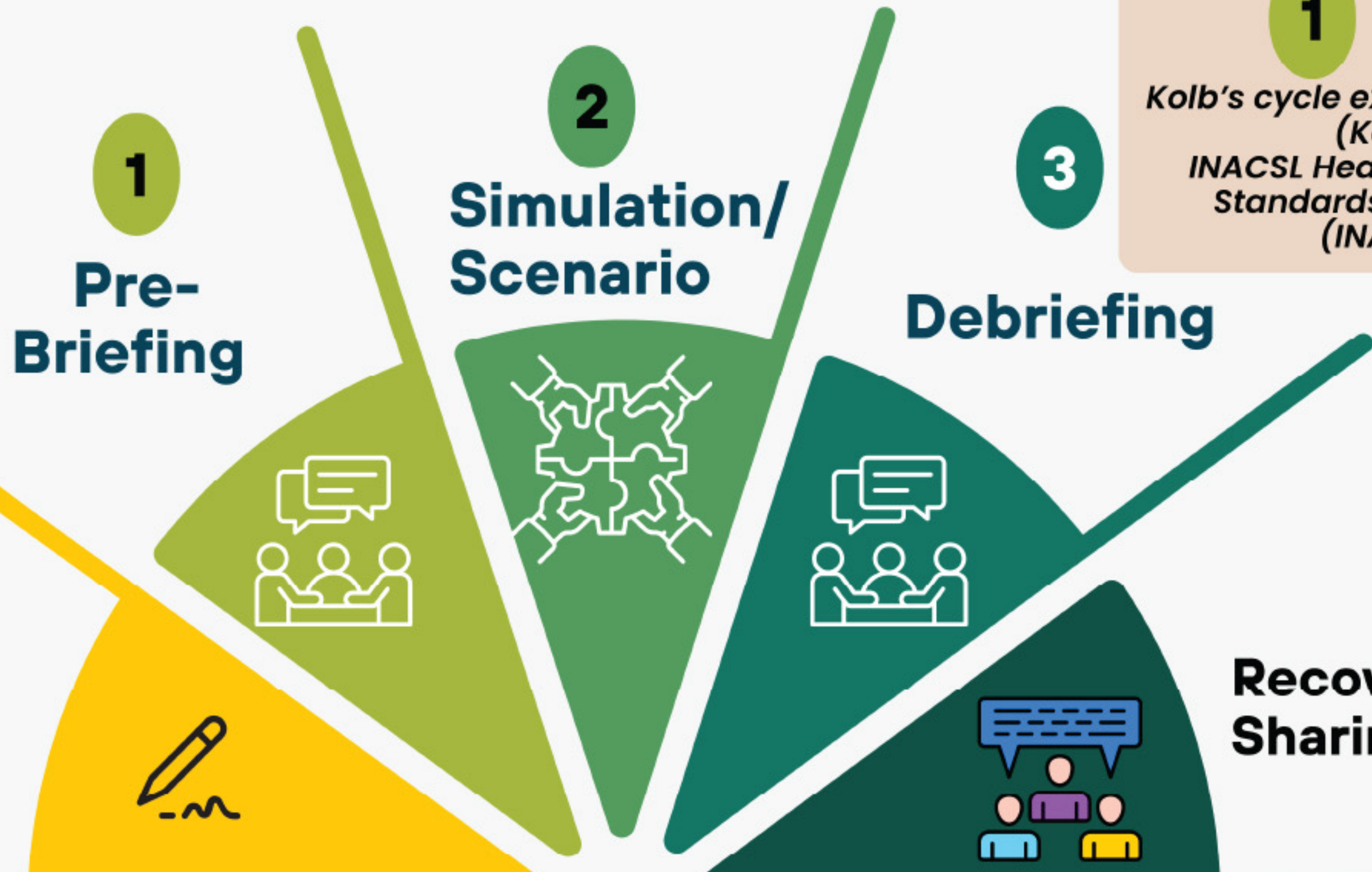
**Adhere to safety and confidentiality**

Case file, where to store the info etc.





# Pre-Clinical Workshop (1.5-2 Day)



- 1
- 2
- 3

*Kolb's cycle experimental learning (Kolb, 2014)*  
*INACSL Healthcare Simulation Standards of Best Practice (INACSL, n.d.)*

## BEFORE WORKSHOP

- Pre-reading
- Demonstration videos
- Intervention resources

## Recovery Story Sharing



# Pre-Clinical Workshop (1.5-2 Day)

CLINICAL EDUCATION III & IV (2022 cohort) - RS42500\_20252\_A

III & IV (2022 cohort) RS42500\_20252\_A Subject Content Pre-clinical workshop PSY (4 JAN full day and 6 JAN PM)

PSY (4 JAN full day and 6 JAN PM)

Build Content Assessments Tools Partner Content

CLINICAL EDUCATION III & IV (2022 cohort)

- CEIII & IV Pre-clinical workshop (simulation) psychiatry
- Materials for simulated treatment
- Pre-readings
- Pre-clinical workshop (PSY) PPT
- Pre-clinical workshop (CEIII/IV)

Initial interview demonstration  
Part II  
Understanding client's occupational functioning  
(MoHO as framework)

## BEFORE WORKSHOP



### Preparation before the workshop

Students are expected to review a few videos and to complete a mini quiz at the end of the videos via Blackboard before attending the workshop.

### Other references/resources recommended:

- RS3450/RS5362 materials related to initial interview and report writing
- Kielhofner, G. (2002). *A model of human occupation: Theory and application*. Lippincott Williams & Wilkins.
- Kielhofner, G., 汪翠滢, & 蔡宜蓉. (2005). 職能表現史會談手冊 (初版). 心理出版社股份有限公司.
- Brown, C., Stoffel, V. C., & Munoz, J. (2019). *Occupational therapy in mental health: A vision for participation*. FA Davis.
- American Psychiatric Association. (2013). *Diagnostic and statistical manual of mental disorders (DSM 5®)*. American Psychiatric Pub
- Sadock, B. J. (2017). *Sadock's, Kaplan & Sadock's comprehensive textbook of psychiatry*. Philadelphia : Wolters Kluwer



# Pre-Clinical Workshop (1.5-2 Day)

## The OT Process

### SIM 1



Initial interview for 3 PSWs

### SIM 2



Individual treatment e.g. illness mx, group setting

### SIM 3



Group intervention

### "Special" scenarios" e.g.:

- PSW suddenly cried
- Dangerous tool in the environment
- Difficult Q "when can I be discharged from hostel?"
- Unexpected responses "I don't think the relaxation exercise is useful"

1

Pre-Briefing

2

Simulation

3

Debriefing



After SIM 1, Case Formulation Exercise and Report Writing Exercise under the coaching of OTs



# Pre-Clinical Workshop (1.5-2 Day)

## KY's share

- **C** : 參加OT可以擴闊社交，增加同其他人的連繫 (在過程中增加了同其他院友的聯繫，有了話題，擴闊社交。)
- **H** : 不只知長處及優勢，更覺得前景有希望(從OT訓練中發現自己有唱歌、普通話、烹飪及對營養有研究等方面的長處及優勢)
- **I** : 能完成OT的訓練，給未來的各種工作，給自己價值)。
- **M** : 令生活更有趣、有意義之間的聯繫，過一個開心
- **E** : OT給予我選擇的權利，命負責。

## KY 與 職業治療

Prepared by KY



Recovery Story  
Sharing



## Content



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# Learning Experience & Outcomes

N=56 students paired data

T1: pre-workshop

T2: post-workshop

Post-workshop  
Survey (T2)

01

- Attitude towards PSY patients & placement
  - Perceived confidence towards placement
- (T1 & T2)

02

Participation rate  
(T1 & T2)

Average response rate in in-class Q&A

03

Quiz  
(T1 & T2)

9 questions  
knowledge on clinical presentation, ax and tx

04

Level 1  
Learner  
Satisfaction

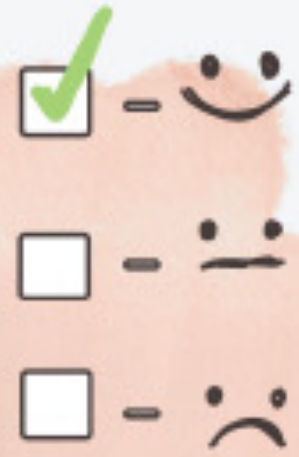
Level 2a  
Modification of  
attitude/perception

Level 2b  
Engagement

Level 2b  
Acquisition of  
knowledge

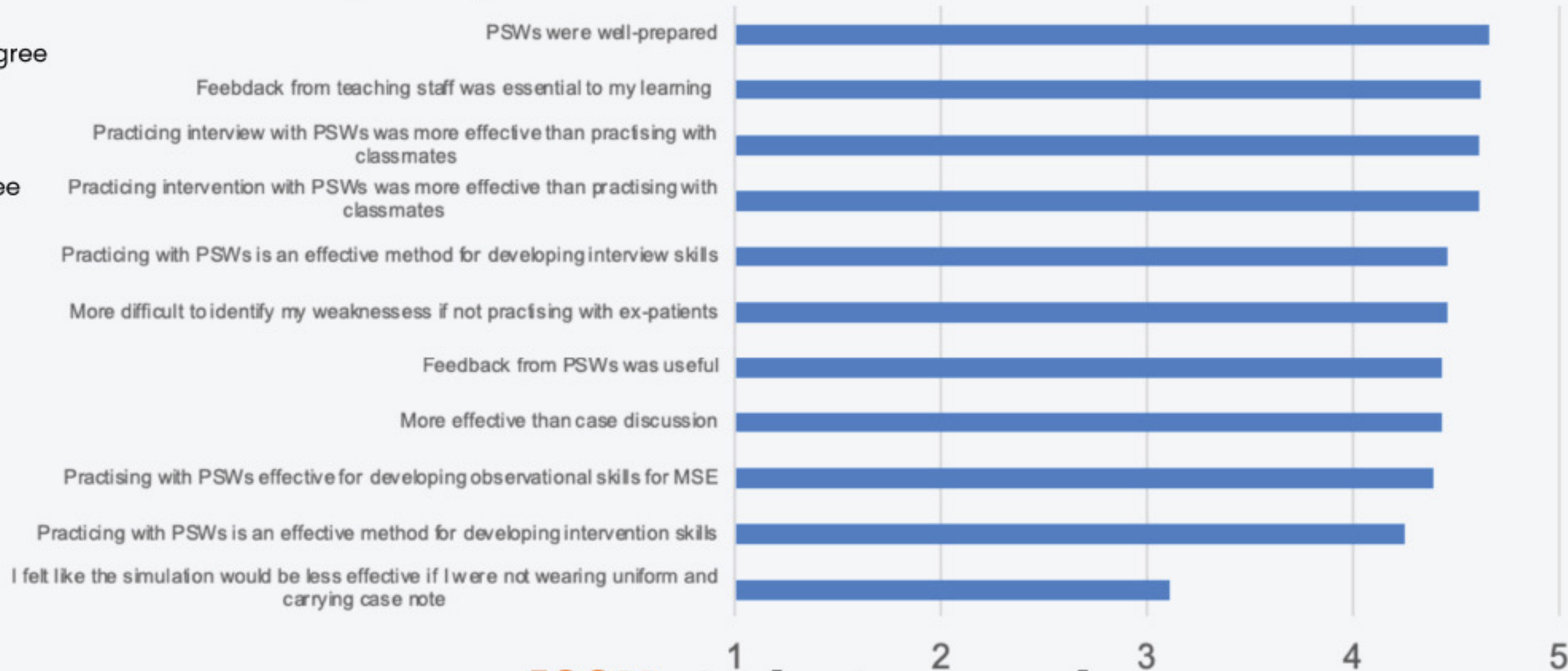
modified Kirkpatrick's (1996) education evaluation typology (Barr et al., 2008)

# Students' Satisfaction - Survey



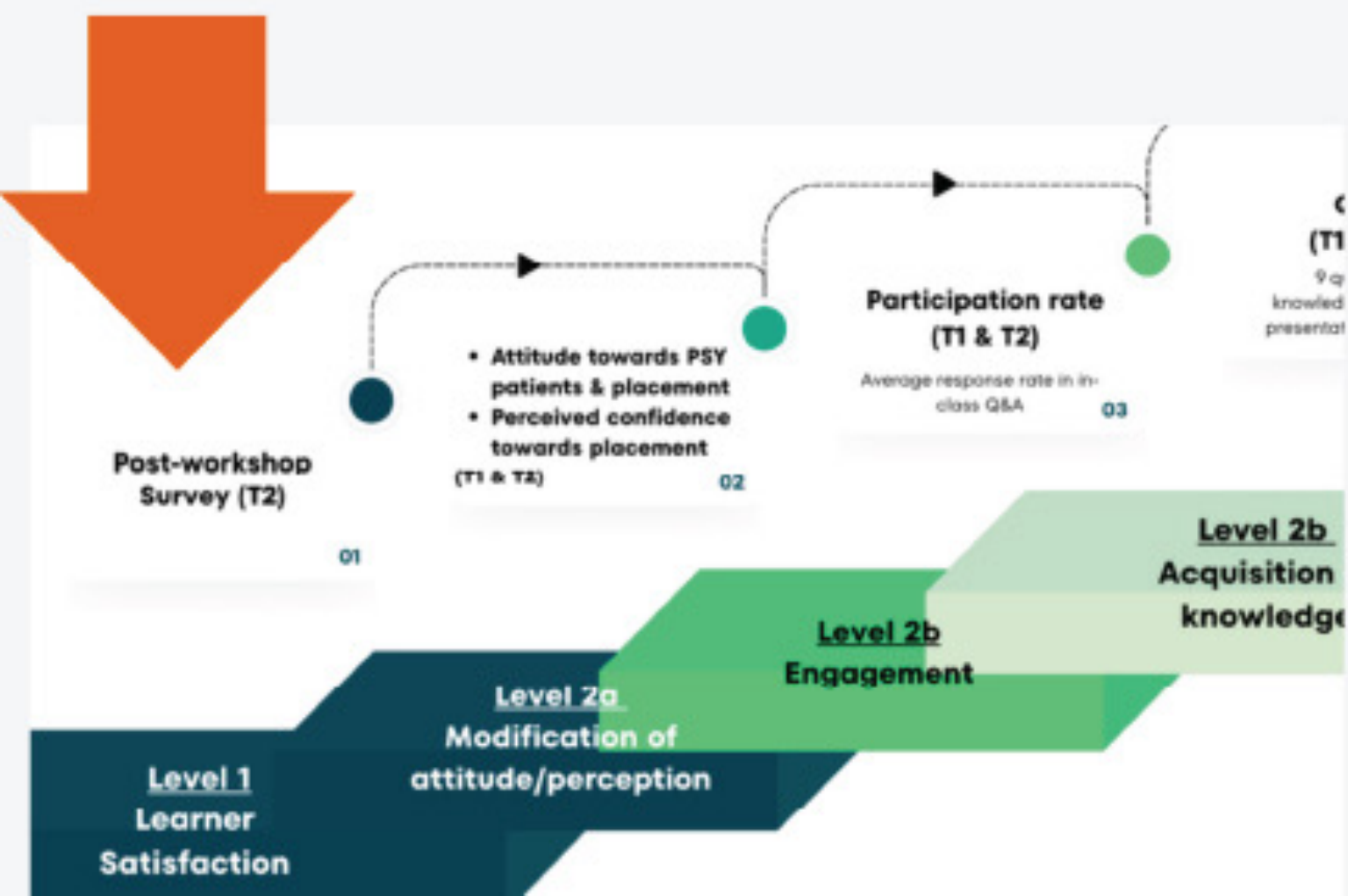
On a scale of 1-5, how far do you agree:

- 1: Strongly disagree
- 2: Disagree
- 3: Neutral
- 4: Agree
- 5: Strongly agree



**100% students agreed**

**workshop is beneficial to enhance placement readiness**  
**PSWs were well-prepared**



(Some items w.r.t. Walls et al., 2019)

# Students' Satisfaction – Feedback



♥ Which part of the workshop that you found most useful?

STUDENTS' FEEDBACK

"Hands-on Experience"

STUDENTS' FEEDBACK

"Actual Interaction with PSWs"

STUDENTS' FEEDBACK

"ALL.... from planning and executing interview, to writing up case notes and case conceptualisation for going through the analysis together, intervention planning and implementation with feedback from both teachers and PSWs"

STUDENTS' FEEDBACK

"Learning the recovery journey of PSWs"

STUDENTS' FEEDBACK

"Experiencing the initial interview process with Peer Support Workers with very authentic reactions and feedback from PSWs"

Post-workshop Survey (T2)

• Attitude towards PSY patients & placement  
• Perceived confidence towards placement (T1 & T2)

Level of Engagement (T1 & T2)

Response rate in in-class Q&A

Quiz (T1 & T2)

9 questions knowledge on clinical presentation, ax and tx

Level 2b Acquisition of knowledge

Level 2a Modification of attitude/perception

Level 2a Modification of attitude/perception

Level 1 Learner Satisfaction

# Changes in attitudes towards PSY patients

# 80%

Did not believe they had adequate chance to interact with PSY patients before workshop



*"People with MI are more dangerous"*  
*"People with SMI can never recover enough to have a good QoL"*

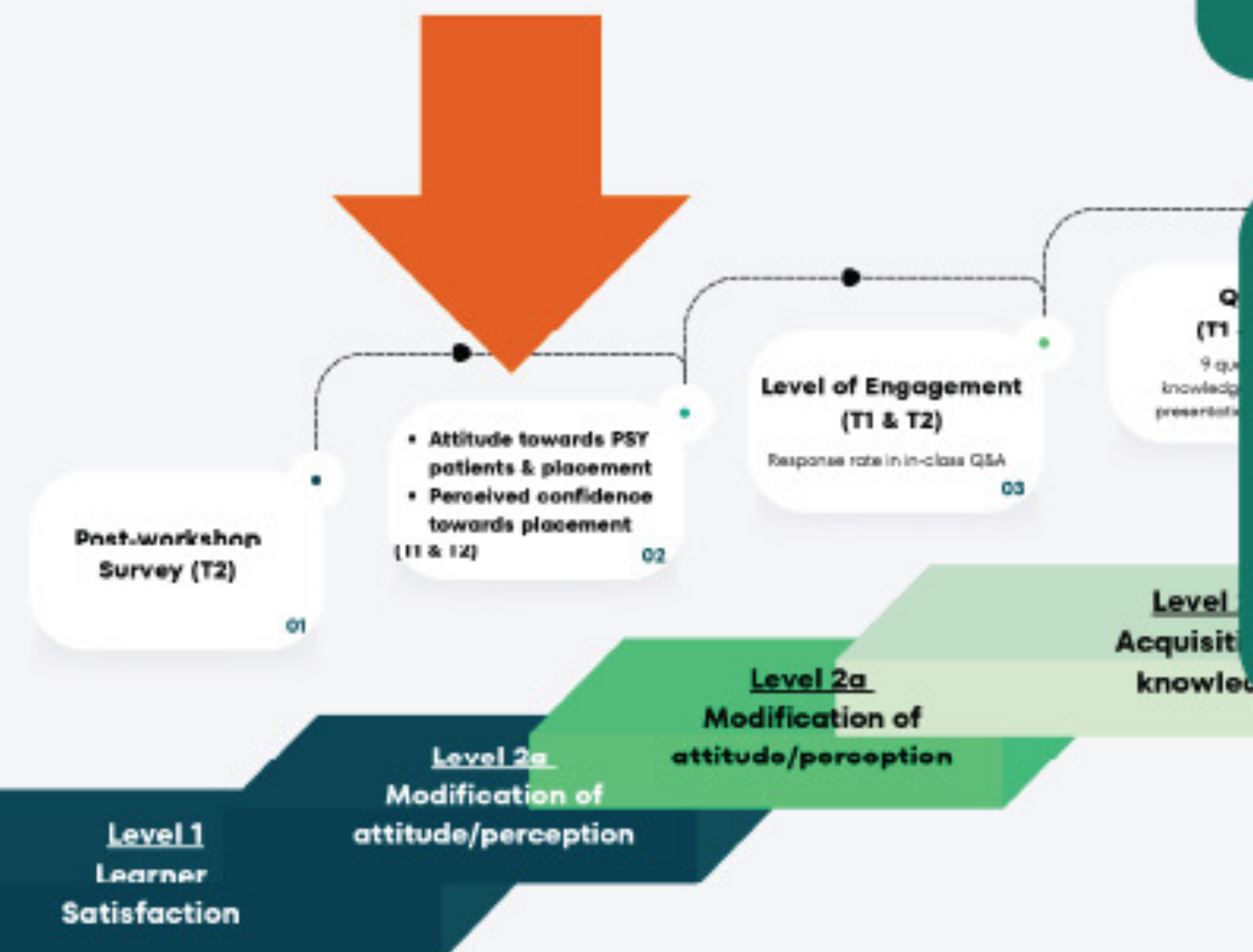
similarly low

*"I feel as comfortable talking to a person with MI as I do talking to a person with physical illness"*

64% → 82%

*"If I had a mental illness, I would never admit this to my classmates for fear of being treated differently"*

50% → 36%



# Changes in attitude towards PSY placement



*PSY placement is more difficult than PHY placement because there's no protocol to follow*

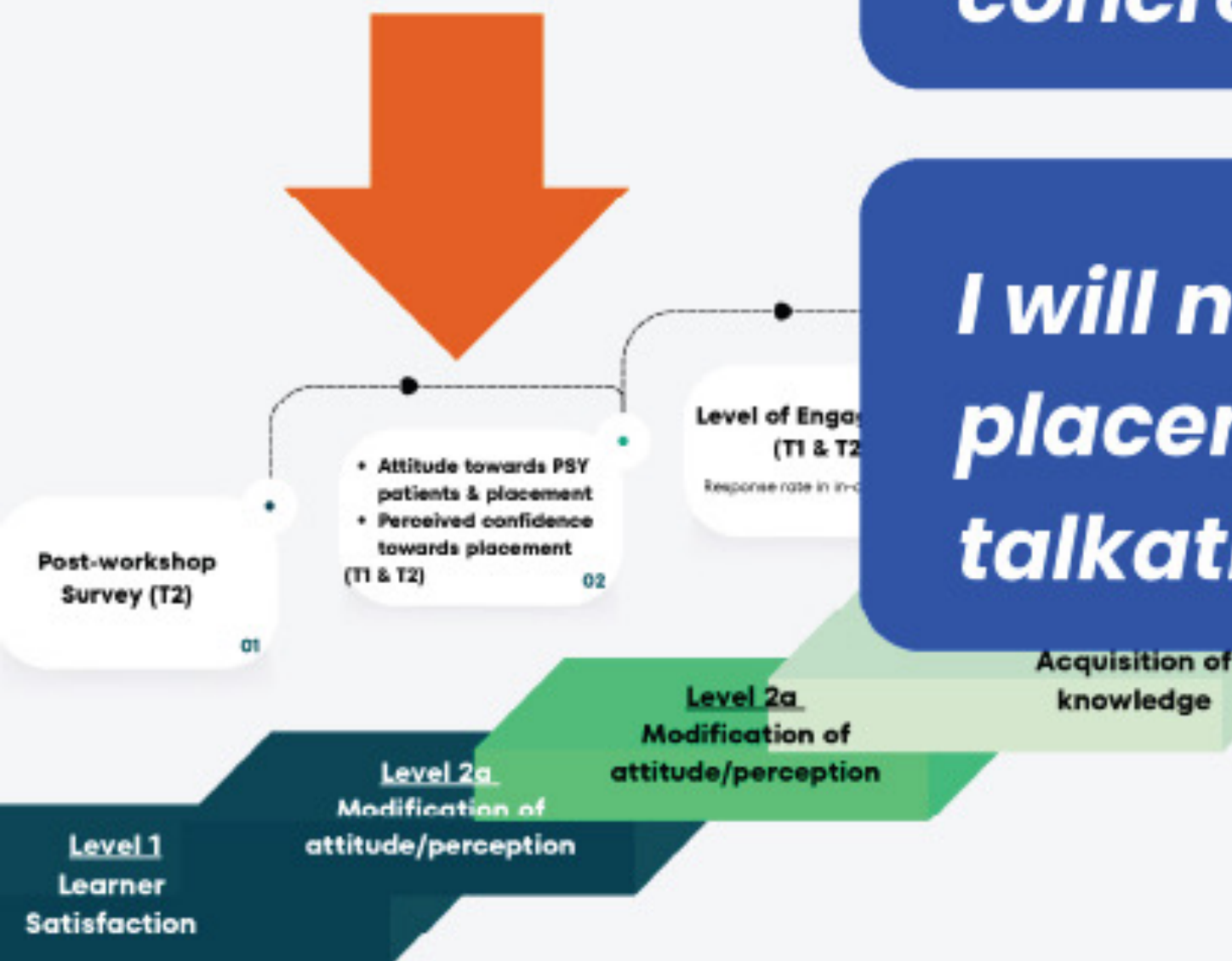
71% → 55%

*PSY OT practice is abstract and based on common sense while PHY OT is concrete and scientific*

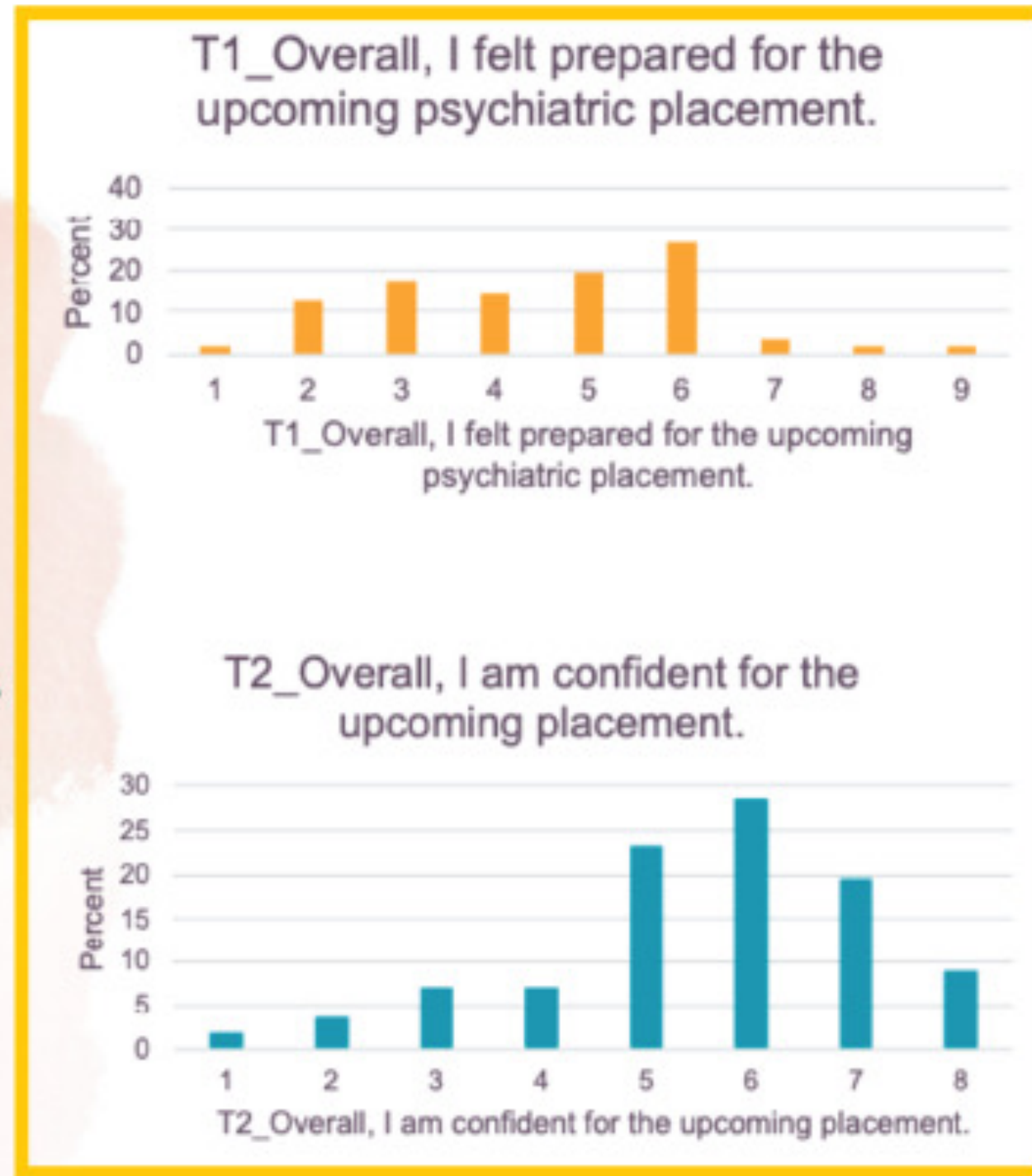
64% → 43%

*I will not attain a good grade in PSY placement because I am not talkative*

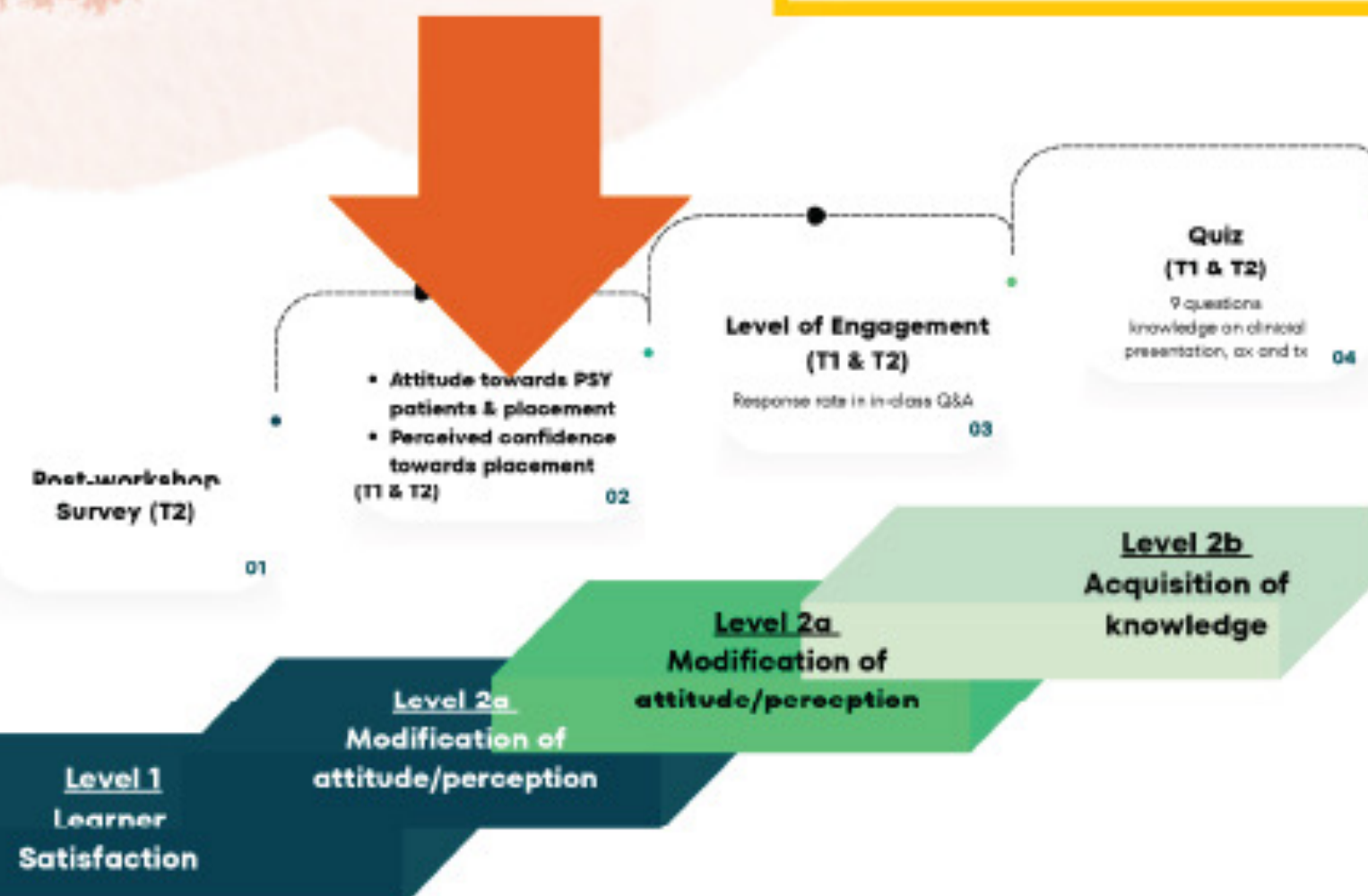
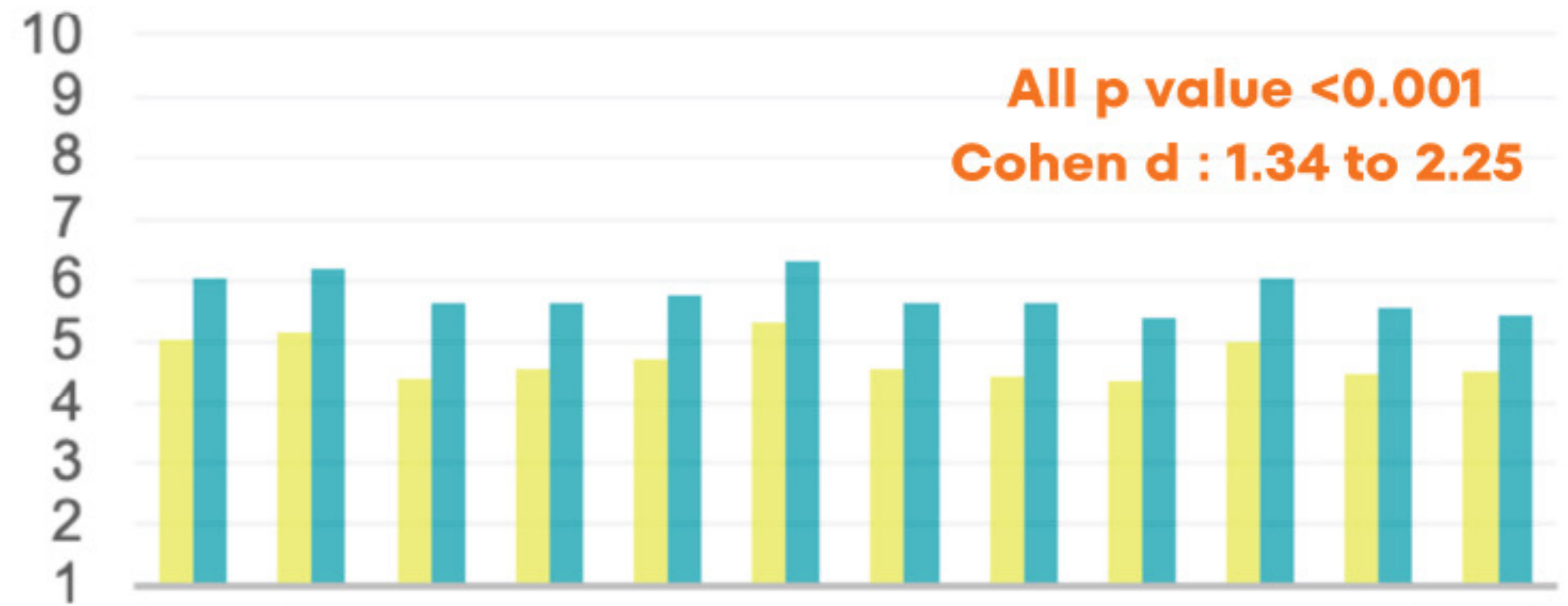
52% → 45%



# Students' Perceived Confidence



On a scale of 1-10, how far do you agree "I am confident in....."

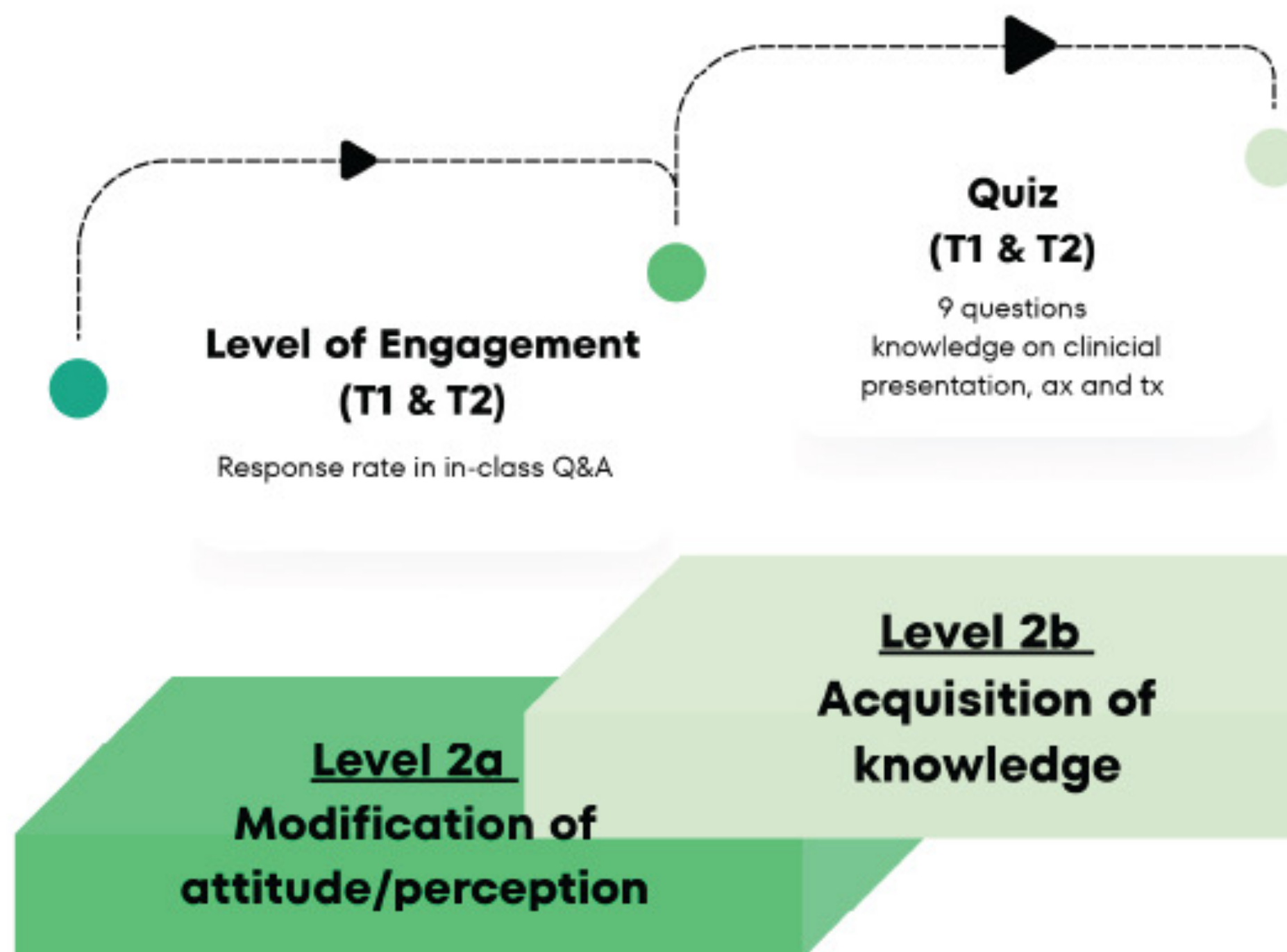


identifying precautions & rendering...  
demonstrating observation skills in MSE  
conducting initial interview  
identifying problems  
case formulation  
application of MoHO  
selecting most appropriate treatment  
implementing intervention  
carrying out entire OT process  
communication with PSY patients  
Overall, I am confident for the...  
Overall, I felt prepared for the...

# Engagement & Knowledge

Average % of participation in in-class Q&As (mentimeter)

64%  
↓  
~100%



T1 Mean (S.D.)	T2 Mean (S.D.)	p-value
5.33 (1.3)	6.36 (1.6)	<0.001

	T1 % correct	T2 % correct
Q1	70	77
Q2	46	71
Q3	71	79
Q4a	50	55
Q4b	39	59
Q5	93	88
Q6	82	96
Q7	29	30
Q8	55	79



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# How do our PSWs find this experience?

As PSWs, we used our live experience to help PIRs. This time, I am **helping PIRs indirectly** thro contributing in the education of OT students. Happy that I can involve and allow students to have **earlier contact and interaction** with former PIRs.

OT has helped me a lot during my recovery journey. If I can take a part to involve in training OT students, to me, it is really **meaningful**. I also felt good that - students were **allowed to "fail" here** with me so that they had lower chances of making mistakes at placement which may affect their confidence.

I am **honoured** to be here and I felt **satisfying** for helping students to identify their strength and weaknesses. Good to help students to "test-the-water" before actual practice.



**B**



**KY**



**E**



# Conclusion



**Involving PSWs in simulated learning is feasible after training**



**Positive students' learning experience and outcomes (changes in attitude, improved confidence, engagement and knowledge)**



**This collaboration has also been mutually beneficial, with students, educators, OTs, PSWs, and teaching staff all learning from one another (“教學相長”)**



**Limitations – (1) not suitable to act “unstable emotion” – SPs by layman  
(2) level 3 outcome (performance) not yet measured**



# Involving Peer Support Workers in Simulation to prepare OT students for Placement



## References

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WFOT  
Congress 2026

# Thank You

## Welcome to connect



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**POLYU**  
**REHAB**



**Supplementary Info**  
**(for speakers' reference)**

## CEIII & CEIV Pre-Clinical Workshop (Psychiatry)

### Background

The CEIII and CEIV are the final long block placements and the last two subjects Occupational Therapy students must pass to meet the OT programme requirements. There is always a gap between academic education and fieldwork in OT. Simulation is a means to replicate clinical experience (Ker & Bradley, 2014). The fidelity of a simulation scenario is maintained when participants engage and respond affectively and cognitively to the simulated learning environment in a manner similar to traditional clinical placements (Ker & Bradley, 2014). The inclusion of simulation in healthcare training has proven viable, with positive results. This pre-clinical workshop, organized by the OT clinical team, aims to provide a simulation-based learning experience that allows students to develop and demonstrate skills in assessment and management in psychiatric rehabilitation, as well as essential professional behaviors expected in clinical settings. For the pre-clinical workshop (psychiatry), a group of trained peer support workers (PSWs) act as patients during simulated case scenarios based on their actual lived experiences. The involvement of PSWs adds authenticity and depth to the scenarios, enabling students to practice clinical and communication skills in realistic situations and better preparing them for psychiatric rehabilitation placements.

### Intended learning outcomes

The simulation in pre-clinical workshop aims to achieve some of the intended learning outcomes of CEIII & CEIV to better prepare students to achieve these outcomes in clinical practice during clinical placement. These includes:

- gather relevant information to facilitate the selection, conduction and evaluation of assessment,
- analyse client situations, incorporating an appropriate OT models and perspectives, to determinate the contribution of OT in promoting occupational performance and participation
- select, plan and conduct appropriate treatment modalities/programmes for specific clients

Apart from the above, students are also expected to develop and demonstrate appropriate professional behaviours

- act in a professional manner that is consistent with the standards and value of the occupational therapy profession
- use and carry out a range of professional and communication skills in interactions with clients
- abide to a range of ethical and professional standards such as confidentiality etc.

Prepared by Panmi Lo (Dec, 2025)

### Preparation before the workshop

Students are expected to review a few videos and to complete a mini quiz at the end of the videos via Blackboard before attending the workshop.

### Other references/resources recommended:

- RS3450/RS5362 materials related to initial interview and report writing
- Kielhofner, G. (2002). *A model of human occupation: Theory and application*. Lippincott Williams & Wilkins.
- Kielhofner, G., 汪翠濠, & 蔡宜善. (2005). *職能表現史會談手冊 (初版)*. 心理出版社 股份有限公司.
- Brown, C., Stoffel, V. C., & Munoz, J. (2019). *Occupational therapy in mental health: A vision for participation*. FA Davis.
- American Psychiatric Association. (2013). *Diagnostic and statistical manual of mental disorders (DSM-5\*)*. American Psychiatric Pub
- Sadock, B. J. (2017). *Sadock's. Kaplan & Sadock's comprehensive textbook of psychiatry*. Philadelphia : Wolters Kluwer

### Simulation details

#### Simulation 1 (interview session)

You will be grouped and partnered with your peers to assume the role of occupational therapist to conduct initial OT interview for **two cases** (to be portrayed by Peer Support Workers). The interview for each case shall last **within 30 minutes**.

For each case, you will be provided with the case's clinical notes, mainly the discharge summaries with information on the case's psychiatric history as well as reason of OT referral.

You are expected to

- assess the case's mental state,
- gather information on the case's occupational functioning, guided by MoHO,
- collaborate with the case to establish preliminary intervention plan (optional).

#### Intended learning outcomes:

- Demonstrate the ability to conduct an initial occupational therapy interview** by gathering relevant information from clinical notes and through direct interaction,

Prepared by Panmi Lo (Dec, 2025)

including assessment of the client's mental state and occupational functioning, guided by the Model of Human Occupation (MoHO).

- Apply professional communication and interpersonal skills** to build rapport, provide reflection, and engage effectively with clients during the interview process.
- Adhere to ethical and professional standards** throughout the interview, including maintaining confidentiality and demonstrating respect for the client's rights and dignity.

#### Simulation 2 (individual intervention)

You will be grouped and partnered with your peers to assume the role of occupational therapist to conduct a pre-assigned individual intervention for **two cases** (to be portrayed by Peer Support Worker). Each individual intervention should last for **within 30 mins**.

The pre-assigned intervention for each case and the respective intervention resources (available in BB) are listed as follows:

Case	Intervention	Resources (in BB)
Case KY	Vocational goal setting and SE Orientation	Goal setting worksheet SE orientation PPT
Caes B	Social Cognition and Interaction Training (SCIT) (session 1)	SCIT PPT, video, therapist and user manual (s1)
Case E	Recovery goal setting	Illness Management and Recovery (s1) PPT, handbook & cue card

You are expected to

- determine the session objectives and outcome criteria based on the needs of the case and the pre-assigned intervention,
- plan the session flow,
- implement the session

#### Intended learning outcomes:

- Demonstrate the ability to plan and implement an individual occupational therapy intervention** by determining session objectives and outcome criteria based on the client's needs and the pre-assigned intervention.
- Organize and conduct the intervention session effectively**, utilizing appropriate resources and therapeutic techniques to facilitate client engagement and participation.

Prepared by Panmi Lo (Dec, 2025)

## Timetable

### Day 1 morning (4 Jan 2026)

Time	Group A	Group B	Group C
<b>9:00-9:15</b>	<b>All students arrive GH013</b> <b>Teaching staff introduces logistic of the workshop</b> <b>Students complete pre-workshop survey</b>		
9:15-9:40	Teaching staff demonstrates initial interview		
9:40-10:00	Students prepare for 1 <sup>st</sup> interview session Pre-brief with teaching staff (1 <sup>st</sup> case)		
	@GH010	@GH012	@GH011
<b>10:00-10:30</b> <b>Simulation 1</b> <b>(1<sup>st</sup> interview session)</b>	Students conduct initial interview for case KY @GH010	Students conduct initial interview for case B @GH012	Students conduct initial interview for case E @GH011
10:30-10:45	Debriefing with teaching staff and PSWs (1 <sup>st</sup> case)		
<b>10:45-10:55</b>	<b>Break and Switch</b>		
10:55-11:15	Students prepare for 2 <sup>nd</sup> interview session Pre-brief with teaching staff for (2 <sup>nd</sup> case)		
	@GH012	@GH011	@GH010
<b>11:15-11:45</b> <b>Simulation 1</b> <b>(2<sup>nd</sup> interview session)</b>	Students conduct initial interview for case B @GH012	Students conduct initial interview for case E @GH011	Students conduct initial interview for case KY @GH010
11:45-12:00	Debriefing with teaching staff and PSWs (2 <sup>nd</sup> case)		
<b>12:00-12:10</b>	<b>Break and Switch</b>		
12:10-12:30	Students prepare for 3 <sup>rd</sup> interview session Pre-brief with teaching staff for (3 <sup>rd</sup> case)		
	@GH011	@GH010	@GH012
<b>12:30-12:50*</b> <b>Simulation 1</b> <b>(3<sup>rd</sup> interview session)</b>	Students conduct initial interview for case E @GH011	Students conduct initial interview for case KY @GH010	Students conduct initial interview for case B @GH012
12:50-13:00	Debriefing with teaching staff and PSWs (3 <sup>rd</sup> case)		

\*The 3<sup>rd</sup> interview session shall last for 20 mins

### Day 1 afternoon (4 Jan 2026)

	Group A	Group B	Group C
<b>2:00-2:05</b>	<b>All students arrive GH013</b> <b>Teaching staff introduces logistic of the afternoon workshop</b>		
2:05-2:30	Mini-lecture on how to write initial interview report and MoHO application		
2:30-3:30	Students write initial interview and case formulation (case KY); receives feedback from teaching staff @GH010	Students write initial interview and case formulation (case B); receives feedback from teaching staff @GH012	Students write initial interview and case formulation (case E); receives feedback from teaching staff @GH011
<b>3:30-3:40</b>	<b>Break</b>		
3:40-4:10	All students arrive GH013 Each group presents case formulation (5 mins presentation and 5 mins discussion)		
4:10-4:20	Teaching staff introduces logistic of Day 2 workshop Teaching staff briefs the different types of intervention		
4:20-4:55	Students prepare for individual and group intervention for Day 2 Pre-brief with teaching staff @GH010	Students prepare for individual and group intervention for Day 2 Pre-brief with teaching staff @GH012	Students prepare for individual and group intervention for Day 2 Pre-brief with teaching staff @GH011
<b>4:55-5:00</b>	<b>End of the day and students depart</b>		

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### Day 2 afternoon (6 Jan 2025)

	Group A	Group B	Group C
<b>2:00-2:10</b>	<b>All students arrive GH013</b> <b>Teaching staff introduces logistic of the afternoon workshop</b> <b>Students prepare for individual session</b> <b>Pre-brief with teaching staff (individual session)</b>		
2:10-2:40	Students conduct individual session for case KY @GH010	Students conduct individual session for case B @GH012	Students conduct individual session for case E @GH011
2:40-3:10	Students conduct individual session for case B @GH012	Students conduct individual session for case E @GH011	Students conduct individual session for case KY @GH010
3:10-3:30	Debriefing with teaching staff @GH012	Debriefing with teaching staff @GH011	Debriefing with teaching staff @GH010
<b>3:30-3:40</b>	<b>Break</b>		
3:40-3:55	All students arrive GH013 Pre-brief with teaching staff (group intervention)		
<b>3:55-4:25</b> <b>Simulation 3</b> <b>(group session)</b>	Students conduct group intervention for 4 participants		
4:25-4:35	Debriefing with teaching staff and PSWs		
4:35-4:50	Recovery story sharing by PSWs		
<b>4:50-5:00</b>	<b>Round up &amp; students complete post-workshop survey</b>		

Prepared by Panmi Lo (Dec, 2025)

# BUILDING PROFESSIONALISM ALONG PLACEMENT JOURNEY

Title	Duration	Remarks	CE1A	CE1B	CE1I	CE1II
Interaction with CE	1:22	Hesitate to answer questions	Y			
Personal Work Safety	1:12	Cutting of finger	Y			
Politeness and work habit 2	1:34	Being late, checking mobile, napping	Y			
Professional attire and appearance	2:55		Y			
Social Manner	1:43	No greeting, late, napping and checking mobile	Y			

Cod	Title	Duration	Remarks	CE1A	CE1B	CE1I	CE1II
C05	Personal Time Management	2:53	Missing deadlines		Y		
C06	Politeness and work habit 1	1:56	Keeping case file without proper communication		Y		
C07	Politeness and work habit 3	1:15	Not tidy up places, loss belongings		Y		
C10	Interaction with CE 3	1:25	Underperformance with presence of CE		Y		
C13	Handling comments from CE	2:47	Feedback after at interview		Y		
A3	Home learning attitude and time management	4:25			Y		
A4	Infection control and use of PPC	2:38	Accessories, hand washing, contact precaution		Y		

## Year 1 (CE1A, 1 wk)

Pre-clinical seminar  
Soft skills training (1A)  
Post-clinical seminar



## Year 2 (CE1B, 4 wk)

Pre-clinical seminar  
Soft skills training (1B)  
Reflective journal (learn2learn)  
Post-clinical seminar



## Year 3 (CE1I, 7 wk)

Pre-clinical seminar  
Soft skills training (II)  
Pre-clinical workshop (specialty-based)  
Post-clinical seminar



## Year 4 (CE1II & IV, 7 wk)

Pre & post-clinical seminar  
**Pre-clinical workshop (specialty-based)**

