

Operating Room Manual

Subject:
OR Observers

Original: 2/4/99

Responsible Dept.:
Operating Room

Effective Date: 10/1/99

Applies to:
Operating Room
OB Operating Room
Cardiac Cath Lab
Short Procedure Unit
Materials Management

Supersedes: 5/1/99

Applicable State, Federal or other laws, regulations:

Reviewed: 9/15/99

Approval:

Chair, Department of Surgery **Date**

Director of Perioperative Services **Date**

Chair, Department of OB/GYN **Date**

Director of Special Services **Date**

Medical Director, Cardiac Cath Lab **Date**

Manager, Cardiac Cath Lab **Date**

PURPOSE:

To establish guidelines that govern observers in the Operating Room, Cardiac Catheterization Lab and Short Procedure Unit areas.

POLICY:

A. All observers must:

1. Have proper picture identification (The only exception is a family member identified by the patient prior to administration of anesthesia or pre-operative sedation.)
2. Have prior approval from the area's Manager or Clinical Coordinator after satisfying criteria outlined in the following sections (including orientation, proof of training or other requirements as outlined).
3. Have prior approval of the physician performing the procedure.
4. Have prior approval of the patient (included item in the Consent for Operation or Invasive Procedure)
5. Be suitably attired according to the procedure area dress code
6. Adhere to Warren Hospital's standards for confidentiality and Infection Control

B. Visiting physicians:

1. Courtesy visiting is extended to any physician.
2. The visiting physician will adhere to Warren Hospital policies and will not scrub in or assist in the procedure.
3. A member of the Warren Hospital medical staff must accompany the visiting physician at all times when in the Operating Room Suite, Cardiac Catheterization Lab, or Short Procedure Unit. The staff member is responsible for orientation of the visiting physician.

C. Non-physician observers:

1. Non-physician observers must have the prior approval of the area's Manager, Clinical Coordinator or Director of Perioperative Services.
2. Orientation to the Operating Room Suite, Cardiac Catheterization Lab, or Short Procedure Unit and the observational experiences will be the responsibility of the area's Manager, Clinical Coordinator or her designee.
3. The observational experience must be directly related to the improvement of care of the patient and appropriate to the observer's responsibilities.
4. Observers who are not employees of Warren Hospital are required to obtain permission in advance of the anticipated visit.
5. Student observation are allowed when the following conditions are met:
 - a. The student's experience in the Operating Room Suite, Cardiac Catheterization Lab, or Short Procedure Unit must be directly related to the educational experience.
 - b. The instructor will schedule observation in advance by submitting a list with student names, to the Operating Room, Cardiac Catheterization Lab, or Short Procedure Unit desk.
 - c. The instructor will schedule orientation with the area's Manager or Clinical Coordinator to include dress code, infection control overview, and traffic patterns and a tour of the changing areas and Operating/Procedure Rooms.
6. Medical sales representatives are allowed to be present during a surgical or invasive procedure under the following conditions:
 - a. **The medical sales representative may act as a resource regarding the representative's product only and may not scrub in or participate in direct patient care.** For example: Prior to implanting the pacemaker, the sales representative will program the pacemaker in accordance with the physician's order. Further the representative may test the implanted leads for conductivity and interrogate the pacemaker after closure of the wound. The representative however can not manipulate the leads or have direct physical contact with the patient during the procedure.
 - b. Prior to observing their first case in the Operating Room, Cardiac Catheterization Lab, or Short Procedure Unit, the sales representative will arrange with the appropriate Manager or Clinical Coordinator for an orientation to the area. This orientation includes review of the dress code, infection control overview, traffic patterns, a tour of the unit, fire procedures and confidentiality. At this time the Letter of Understanding, Confidentiality Statement, Orientation Checklist and Code of Conduct will be reviewed and signed by the sales representative.
 - c. Sales representatives will provide Warren Hospital with proof of training, company endorsement, and certificate of liability insurance. These documents will be kept in a personnel file in the Operating Room Suite and are available for review by the Cardiac Catheterization Lab or Short Procedure Unit staff as needed. For ease of availability, copies of same may be kept in the Cardiac Catheterization Lab for representatives who frequent this area. It is the sales representative's responsibility to keep this information current and valid.
 - d. When the case is scheduled the OR scheduler, Manager of the Cardiac Catheterization Lab or Short Procedure Unit Clinical Coordinator will verify the representative's personnel file to determine if orientation, training and liability information is current and valid. It is the responsibility of the sales representative to provide ongoing documentation of compliance with this policy. However, in an attempt to provide uninterrupted patient care, if documentation is missing or outdated, this person will contact the representative so that corrective action may be taken.

- e. Any equipment brought in by the sales representative must be processed through the Materials Management and Biomedical departments. Prior to use of any new equipment, the sales representative, through an onsite inservice will educate the Operating Room, Cardiac Catheterization Lab, or Short Procedure Unit staff. Attendance at this program will be noted in the individual employees' educational records,
 - f. Representatives must obtain a visitor's pass from the Materials Management department before checking in at the Operating Room, Cardiac Catheterization Lab, or Short Procedure Unit desk.
 - g. Representatives will only be allowed in the Operating Room, Cardiac Catheterization Lab or Short Procedure Unit after the patient has been draped (and anesthetized if anesthesia or conscious sedation is planned) and will exit promptly at the conclusion of the procedure.
 - h. The nursing staff will document the presence of the representative in the operating or procedure room in their portion of the patient's medical record.
7. Family members or friends of patients will not be allowed to visit in the Operating Room, Cardiac Catheterization Lab or Short Procedure Unit. There are 2 exceptions to this rule:
- a. **Cesarean Sections:** The support person may be allowed in the Operating Room to attend the Cesarean Section delivery only when there is no evidence of compromise of the health of the mother or the infant in the judgement of the obstetrician and/or anesthesiologist. Only after the mother has been stabilized, prepared and draped will the observer be allowed in the Operating Room. The observer will sit at the head of the table, to the side of the anesthesiologist behind a screen that enables him/her to speak to the mother. If difficulties of any sort should arise, the observer will leave the operating room. If requested by a member of the healthcare team (or if the observer wishes), the observer will accompany the nurse and infant when the infant is transported to the nursery.
 - b. **Children:** If deemed beneficial to care, a parent or caregiver may accompany their child into the Operating Room or Short Procedure Room. They may remain present until the child is sedated and then must leave the area.
- D. Requests for observation not otherwise addressed
1. In cases of extreme emergency, a request for observation should be submitted (in the following order until one can be reached) to the appropriate Manager or Clinical Coordinator, the Director of Perioperative Services or the Chairman of the Medical Staff Department or their designee.
 2. If the observer's presence is deemed to be of benefit to the outcome of care or other extenuating circumstances exist, these individuals may authorize the request.

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