Visitors to the Operating Room and Central Sterile Supply Department

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Document Type	Clinical Guideline
Risk of non-compliance	may result in a small degree of harm to the patient/DHB
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• Organisation(s)	Auckland District Health Board
• Directorate(s)	Perioperative
• Department(s)	Generic
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• Used by which staff?	All operating room staff
• Excluded	
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• Delegate / Issuer	Director - Perioperative Services
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Contents

1. Purpose of guideline

To ensure staff know the process for visitors requesting entry to any area within an operating room suite or Central Sterile Supply Department (CSSD).

2. Scope

- All operating room staff
- All visitors (non-Auckland District Health Board (Auckland DHB) employees) requesting entry to an operating room department. This may include medical representatives, visiting registered medical professionals.
- This document excludes all health professional students associated with a training organisation affiliated with the Auckland DHB who are currently on a clinical rotation verifiable by the training institution, or are assisting with related research.

3. Definitions

Term	**Definition**
MIA	Medical Industry Associate
Visitor	A person who is not a permanent Auckland DHB employee of the operating rooms or CSSD. This may include but not limited to medical representatives.

4. Guideline management principles and goals

A visit to the operating room department or CSSD by medical representatives will be restricted to those that are to the benefit to the patient i.e. a medical representative supporting new equipment or processes; or other business regarding supply of surgical equipment.

Visiting clinicians must have all relevant documentation completed and returned to the relevant general manager with a copy sent to the operating room Manager as per applicable forms for visiting clinicians above.

The purpose for the visit to the operating room/CSSD must be made explicit to the unit manager prior to entering the department.

All visitors to the operating room department/CSSD must be approved by the unit Manager or delegated authority and display clear visual identification

Visitors to the operating room/CSSD who have not gained permission may be asked to leave until they have gained appropriate approval.

For the duration of the visit the visitor must adhere to Auckland DHB policy and procedure under the direction of the Manager or delegate.

The visitor will only attend the clinical area when required for the purpose of the visit.

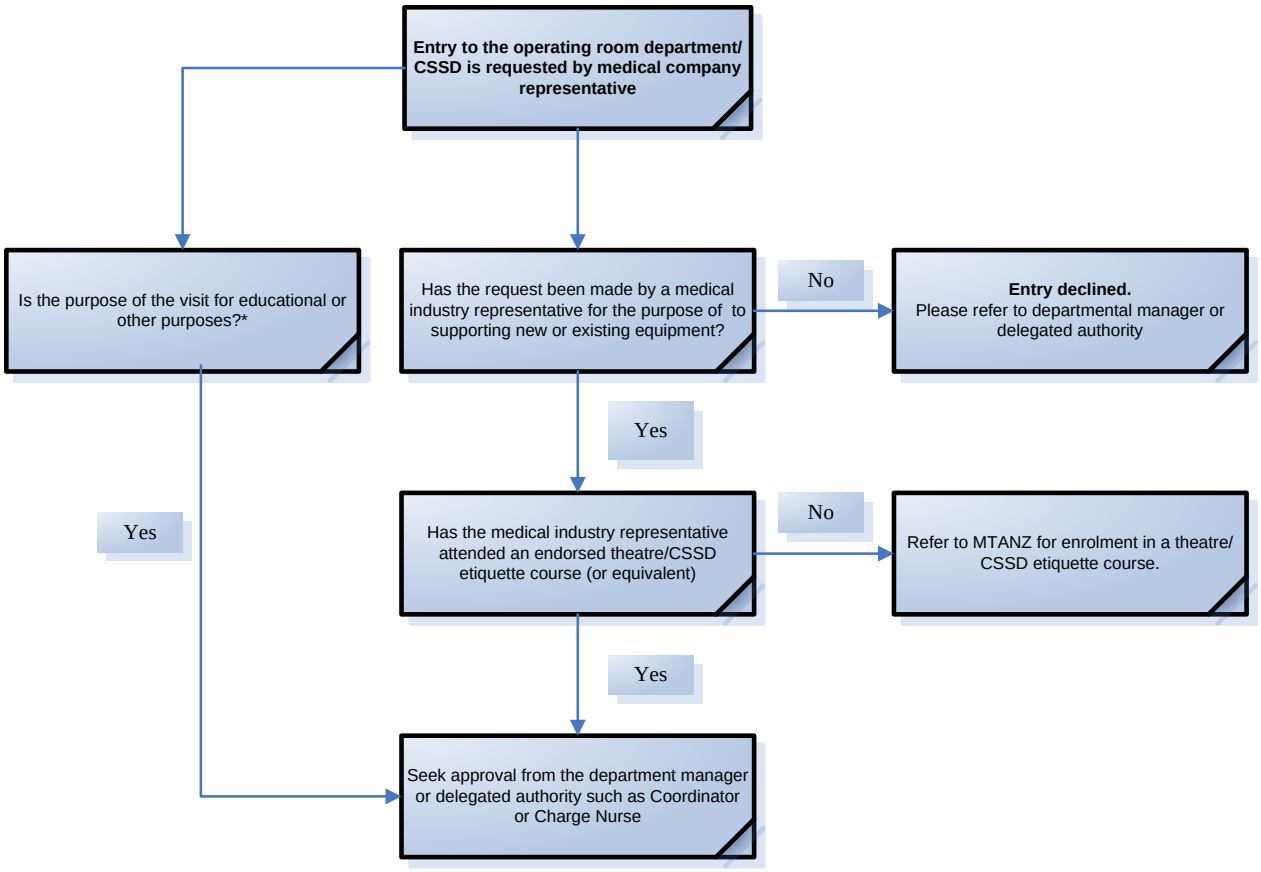
All visitors, including medical and product company representatives, should sign into and out of the visitors' book available at departmental reception.

Students - under no circumstances are school students permitted in the perioperative department to observe. This includes students who may be on an organisational programme or who have gained entrance to the perioperative area by another means.

Medical, allied, and nursing students are only permitted access to a specific operating room if this is associated with their clinical rotation or as a patient follow through. Patients must also provide informed consent to the presence of the student and their purpose and role in the procedure.

5. Medical company representatives requesting entry to the operating room or CSSD

The table below describes the process for a medical company representative requesting entry into the operating theatre or CSSD.



6. Medical representative entrance criteria and process

Product representatives will be permitted access to the operating room in accordance with the following guidelines:

- To introduce approved new product, device or piece of equipment for evaluation or formal clinical trial as pre-approved by health Alliance or CPC.
- As a resource to the surgeon or the nursing staff to support an existing/approved product, device, or piece of equipment.
- Product representatives may visually and audibly verify an item with the surgeon; however they may not open any item and place it on the sterile field, or otherwise perform the duties of the circulating RN.
- Product representatives may access the operating room upon the formal request of the Consultant surgeon/Anaesthetist/Chief Perfusionist and as arranged by them. No "drop in" visits will be permitted.
- Prior to entering the surgical suite, all product representatives must report to the operating room. Reception and sign-in in the Surgical Visitor's Log Book. Required information includes but is not limited to:
    - Vendor Name
    - Company
    - Sponsor (surgeon/nurse manage, etc.)
    - Reason for the visit/product
- After changing into scrub attire as per surgical attire policy (see associated document) and signing in, product representatives should proceed directly to the appropriate operating room or remain in the operating room staff lunchroom if the case not yet begun. They must remain in their assigned surgical room. They are not permitted to move freely among the various rooms.
- The patient should provide informed consent for the presence of a product representative and understand their role in the operating room.
- To ensure patient privacy, the Medical Representative should only enter the room when it is the appropriate time for use of their particular product.
- Product Representatives identification badges must be present and visible at all times.
- The operating room team should all be aware of the product representatives and the purpose for their presence for the procedure.
- They are not permitted to take or review a surgery schedule and may not take any documents (including patient labels) that contain any patient-specific information, including NHI, social security number, or medical records number.
- Product Representatives are not permitted to distribute or post any type of hand printed or handwritten invitations, advertisements, signs or promotional materials
- Product Representatives must comply with all Auckland DHB policies and procedures while in the operating room. Any concerns should be directly communicated to the CN/floor coordinator or operating room Manager.

- In the event of an emergency the product representative must proceed to the designated assembly point unless required by the surgeon.
- All product representatives should have received appropriate faculty specific orientation, training regarding expectations for asepsis, infection control, emergency management, blood and body fluid protection, health and safety and patients' rights. It is recommended the representative attend or be booked to attend a suitable MIA training session for this.
- Medical representatives are not to take any photos nor are they to ask others to do so for them.
- Medical Representatives shall not scrub for any procedure or take part in direct patient care
- Medical Representatives may visually and audibly verify an item with a surgeon however they may not item the item onto the sterile filed which is the task of the circulating nurse.
- Names and company should be recorded in the visitors list on the OR nursing record

7. Supporting evidence

- Medical Technicology Association of New Zealand. (2016). Code of Practice. Retrieved from http://mtanz.org.nz/Code-of-Practice/6701/
- Association of perioperative Registered Nurses. (2014). AORN Guidance Statement: The Role of the Health Care Industry Representative in the Perioperative Setting.

8. Legislation

- Privacy Act 1993
- Health Information Privacy Code 1994
- Health and Disability Commissioner (Code of Health and Disability Services Consumer Rights) Regulations 1996

9. Associated documents

- Clinical Record Management (includes Access to Patient Information)
- Human Resource Principles
- Informed Consent
- Media
- Information Privacy and Security
- Visitors - Grafton Site
- Code of Rights
- Staff Agreement – Confidentiality of Patient & Other Personal Information and Appropriate Use of ADHB Systems & Technology (confidentiality agreement)
- Uniform, Surgical Attire / Scrub Clothing & Professional Presentation
- Support Person in Operating Rooms & Procedure Rooms

Applicable forms for visiting clinicians

- Auckland District Health Board. (Last modified 04/07/18). *Visiting Clinicians*. Retrieved from https://adhb.hanz.health.nz/site/myhr/Pages/Visiting-Clinicians.aspx

10. Disclaimer

No guideline can cover all variations required for specific circumstances. It is the responsibility of the health care practitioners using this Auckland DHB guideline to adapt it for safe use within their own institution, recognise the need for specialist help, and call for it without delay, when an individual patient falls outside of the boundaries of this guideline.

11. Corrections and amendments

The next scheduled review of this document is as per the document classification table (page 1). However, if the reader notices any errors or believes that the document should be reviewed ***before*** the scheduled date, they should contact the owner or Document Control without delay.