

Guide for Scheduling Research Subjects in the Operating Room (OR)

Objective: To ensure all research subjects scheduled in the OR are identified, prepared, and managed according to study protocols and institutional policy.

Initial Requirements

Prior to enrolling participants in any research project involving the OR, it is the Principal Investigator's responsibility to:

- Obtain **BSLMC administrative approval** for the research project.
- Conduct an **in-service** training for OR staff, ensuring they are informed of study protocols, patient handling, and documentation requirements.

Steps to scheduling and communicating research procedure in OR

1. **Flag** Research Patient in Epic
2. **Upload the signed research consent** form to the patient's EMR.
 - a. Refer to the BSLMC approval letter for the timeline requirement on uploading consent documents, as this must align with hospital and study guidelines.
3. **Place Orders** for Procedure and Required Tests:
 - a. Enter the order for the procedure and any related tests in Epic.
 - b. Associate each order with the correct research diagnosis code (Z00.6) and study protocol to ensure procedural accuracy and proper billing.
4. **Schedule Patient** via the Applicable OR Department:
 - a. Coordinate with the OR scheduling team to reserve an OR slot that accommodates study requirements.
 - b. Provide the OR department with necessary patient and procedural information, ensuring transparency on any special needs or timing requirements.
5. **Communicate** with OR Team:
 - a. The study team should notify the OR staff and any relevant departments about the scheduled research procedure.
 - b. Confirm that all team members are aware of the research-specific requirements and have access to the patient's flagged record and consent in Epic.
6. **Study Coordinator Presence** during procedure:
 - a. The study coordinator must be present or on standby during the entire procedure to:
 - i. Coordinate any research-specific aspects of the procedure.
 - ii. Answer questions from the OR team and address any unexpected study-related requirements.
 - iii. Ensure the study is conducted in compliance with the approved protocol

By following this guide, the research and OR teams can collaborate effectively to provide safe, compliant care for research subjects undergoing OR procedures. This structured approach supports both patient care and adherence to research protocols from scheduling through completion.

For questions, contact BSLMC Research Office via email at BSLMC_Research@bcm.edu, 713-798-6024