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**Version Number:** 1

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n/a

## **Management of visitors within the Operating Theatre Department Policy**

### **Policy Statement**

Cardiff and Vale University Health Board is committed to maintaining a safe, secure, and accessible operating theatre environment. To support this, a formal record of all non-theatre personnel entering and exiting the department will be maintained. This process helps prevent unauthorised access to controlled areas and ensures compliance with legal and organisational responsibilities.

The Perioperative Care Directorate is dedicated to balancing its duty of care with the need to provide a welcoming and user-friendly environment for all individuals entering the operating theatre department.

### **Policy Commitment**

The Cardiff and Vale University Health Board is committed to protecting patients, staff, visitors, and UHB assets. This commitment ensures the continued delivery of high-quality treatment and care in a safe and secure environment.

The Perioperative Care Directorate aims to maintain an operating theatre environment that prioritises safety while remaining accessible and supportive for all users.

The objectives of this policy are to:

- Prevent unauthorised access to the department
- Protect patient safety and dignity
- Safeguard the health and safety of patients, staff, and visitors
- Protect UHB property

### **Supporting Procedures and Written Control Documents**

This Policy is supported by the following documents:

- Health and Safety Policy
- ID Badge Policy
- Major Incident Plan
- Security Services Policy
- Patients Property Policy
- Privacy and Dignity of the Patient Within the Operating Theatre
- Consent Policy
- Patient Confidentiality Procedure
- Incident, Hazard and Near Miss Reporting Policy
- UHB Dress Code
- Social Media Procedure

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- Theatre Etiquette Procedure

### Scope

This policy applies to all non-theatre personnel accessing any operating theatre department location within Cardiff and Vale University Health Board. This includes individuals with honorary contracts, clinical students, company representatives, visiting staff, and custodial officers

### Equality Impact Assessment

An Equality Impact Assessment (EqIA) has been completed and this found there to be no impact.

### Health Impact Assessment

A Health Impact Assessment (HIA) is not required for this policy.

### Policy Approved by

Quality Committee

### Group with authority to approve procedures written to explain how this policy will be implemented

Director of Quality and Safety

### Accountable Executive or Clinical Board Director

### Disclaimer

If the review date of this document has passed, please ensure that the version you are using is the most up to date either by contacting the document author or the [Governance Directorate](#).

### Summary of reviews/amendments

Version Number	Date Review Approved	Date Published	Summary of Amendments
1	28/10/2025	October 2025	New Policy
2			

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## **Introduction:**

Cardiff and Vale University Health Board is committed to ensuring a safe and secure environment within the Operating Theatre Department. This policy aims to uphold best practices, prioritising the safety of patients, staff and visitors.

As the operating theatre departments are secure, restricted-access areas, this policy establishes procedures for documenting the entry and exit of non-theatre personnel. This helps minimise unauthorised access and supports safe and efficient evacuation if required.

## **Aim & Objectives:**

The aim of this policy is to manage visitors within the operating theatre departments effectively. The objectives are to:

- Prevent unauthorised access
- Protect patient safety and dignity
- Safeguard the health and safety of patients, staff and visitors
- Protect UHB property

## **Scope:**

This policy applies to all non-theatre personnel, including:

- Clinical students (dental, medical, nursing, ODP and medical work observation)
- Company Representatives
- Visiting staff
- Custodial officers

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### Department Areas:

This policy applies to the following areas within the Perioperative Care Directorate:

- Main Theatre Upper (MTU), University Hospital of Wales (including pack room and TSC areas)
- Main Theatre Lower (MTL), University Hospital of Wales
- Children's Hospital of Wales (CHfW) Theatres, University Hospital of Wales
- Main Theatre, University Hospital Llandough (UHL)
- Day Surgery Theatres (DSU), University Hospital Llandough (UHL)
- CAVOC Theatres, University Hospital Llandough (UHL)

### Procedure:

Upon arrival into **MTU, CHfW and Main Theatre UHL**, all visitors must:

- Report to the theatre reception
- Identify themselves verbally to the reception staff
- Present photographic identification (either Cardiff and Vale UHB or company issued)

During out of hours periods, visitors to **MTU UHW** must report to the duty manager and follow the process listed above

For **CAVOC theatres, UHL and DSU Theatres UHL**, visitors must first report to Main Theatre reception UHL

For **MTL, UHW**, visitors must report to the Duty Manager and follow the same identification process.

In exceptional cases, such as when a patient (adult or child) requests accompaniment into the theatre department, a family member, caregiver or designated healthcare professional may enter the department with the patient. This must be approved by the surgeon or anaesthetist and the individual must be chaperoned at all times by a designated staff member.

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It is also noted that in situations such as Major Haemorrhage being declared on 2222/3333 emergency the relevant staff would have TDSI access and would enter the department to prevent a delay in patient care.

Visitors will not be permitted into the operating department areas if they attempt to access the areas through an alternative entry point other than those listed in the department areas section above.

All visitors to the department areas may be challenged by theatre staff and their identity checked at any time if they do not recognise them.

The visitor must inform the reception staff or duty manager of the person they have arranged to meet with the reason for attendance. This will be checked to confirm authorisation.

Company representatives must have an appointment booked with the staff member they have come to see so that the staff member is available to meet with them at the agreed time. If this is not organised in advance access will not be granted.

All students and observers must have a scheduled placement arranged to visit the department or if it is arranged on a short notice basis, confirmation must be given prior to the visit by the ward staff or supervising manager.

On arrival in the department areas and following the identification processes, all visitors must complete the visitor sign in documentation in the visitor book stating:

- Date
- Visitor name
- Company name / department if appropriate
- The name of the person they are visiting / theatre / area they are visiting
- Time of arrival into the department

The reception staff / Duty Manager will issue the visitor with a numbered visitor badge that they must keep in their person throughout the entirety of their visit. The number of the badge will be documented in the visitor book. The badge will also allow TDSI access to the appropriate changing room.

Visitors must sign out by documenting the time of exit out of the department in the visitor book and return the visitor badge. The reception staff / Duty Manager will document return of the badge in the visitor book. This will allow an accurate record of the visitors within the department.

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Out of hours in MTU the visitors book will be kept in the Main Theatre Recovery area.

Visitors (e.g. students, company representative) requiring access to the theatre during surgery must:

- Obtain patient consent in advance, documented on the consent form by the surgeon
- Have an honorary contract in place, arranged via the relevant university or People's Services
- Be approved by the Senior Scrub Practitioner in that theatre based on space and staffing considerations that day

Confirmation that the patient has agreed to the (students, company representative) will be made by the registered practitioner when undertaking the pre-operative checklist and Sign In step of the WHO surgical safety checklist. The visitor will introduce themselves by name and role as part of the WHO checklist process. The visitor will be recorded as being in the theatre-on-theatre man/ Aqua as a record of this

Where a patient lacks capacity to consent, the presence of students, observers or company representatives must only be permitted if:

1. The patient has previously given informed consent prior to losing their capacity; or
2. Their presence is necessary for the patient's direct care and justified as being in the patients best interest under the Mental Capacity Act (2005).
3. Educational benefits would not override the patients right to dignity or privacy.
4. A parent with Parental Responsibility can consent on the patient's behalf.
5. This must be clearly documented in the patients notes / on the consent form.

Under no circumstances will any visitors be allowed into the clinical aspects of the department areas without an honorary contract in place.

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Visitors to the department areas must abide by all UHB policies at all times during the visit.

## **Responsibility**

The overall responsibility of overseeing this policy and ensuring that it is implemented and enacted sits with the Theatre Manager for each theatre suite.

## **Policy Review:**

This policy will be reviewed in response to changes in legislation or guidance, and at a minimum every three years from the date of approval.

## **Distribution:**

The policy will be available via the UHB Policy and Procedure SharePoint site and Perioperative Care Directorate SharePoint page. It will also be shared with all student bodies.

## **Audit:**

Adherence to the policy will be appropriately audited by the Perioperative Care Directorate. Any concerns raised and reported breaches to the policy will be formally investigated.