

**Tools for self-care of the elderly in the pre- and post-operative periods: scoping review protocol***Herramientas para el autocuidado de las personas mayores en el pre y postoperatorio: protocolo de scoping review**Ferramentas para o autocuidado da pessoa idosa nos períodos pré e pós-operatório: protocolo de scoping review***Abstract**

The aim is to map the scientific production on elderly patients in the pre- and post-operative periods of elective surgery in the hospital setting, aiming to encourage self-care and patient safety. The proposed Scoping Review will follow the Preferred Reporting Items for Systematic Reviews and Meta-Analyses for Scoping Reviews (PRISMA-ScR) extension, registered in the Open Science Framework. The study will follow the methodological recommendations of the Joanna Briggs Institute, searching the databases listed in the text to identify studies that fit the scope of this review. The studies will be evaluated by two independent reviewers; in case of differences in the evaluation results, a third reviewer will conduct a new evaluation. Regarding dissemination, the content identified in this Scoping Review will form the theoretical basis for the development of software to guide nursing care for elderly patients in the pre- and post-operative periods, providing guidance aimed at encouraging self-care and patient safety. Subsequently, these guidelines will be validated through a validation process.

**Descriptors:** Review; Elderly; Nursing Care for Hospitalized Elderly Patients; Biomedical Technology; Perioperative Nursing.

**Resumen**

El objetivo es mapear la producción científica sobre pacientes ancianos en los períodos pre y postoperatorios de cirugía electiva en el ámbito hospitalario, con el objetivo de fomentar el autocuidado y la seguridad del paciente. La Revisión de Alcance propuesta seguirá la extensión PRISMA-ScR (Ítems de Informe Preferidos para Revisiones Sistemáticas y Metaanálisis para Revisiones de Alcance), registrada en el Marco de Ciencia Abierta. El estudio seguirá las recomendaciones metodológicas del Instituto Joanna Briggs, buscando en las bases de datos listadas en el texto para identificar estudios que se ajusten al alcance de esta revisión. Los estudios serán evaluados por dos revisores independientes; en caso de diferencias en los resultados de la evaluación, un tercer revisor realizará una nueva evaluación. Con respecto a la difusión, el contenido identificado en esta Revisión de Alcance formará la base teórica para el desarrollo de un software para guiar la atención de enfermería para pacientes ancianos en los períodos pre y postoperatorios, proporcionando orientación dirigida a fomentar el autocuidado y la seguridad del paciente. Posteriormente, estas pautas serán validadas a través de un proceso de validación.

**Descriptorios:** Revisión; Anciano; Atención de Enfermería a Pacientes Ancianos Hospitalizados; Tecnología Biomédica; Enfermería Perioperatoria.

**Resumo**

Objetiva-se mapear a produção científica sobre o idoso na condição de pré e pós-operatório de cirurgia eletiva no ambiente hospitalar, visando o estímulo ao autocuidado e à segurança do paciente. A *Scoping Review* proposta será conforme extensão *Preferred Reporting Items for Systematic Reviews and Meta-Analyses for Scoping Reviews* (PRISMA-ScR), foi registrado na *Open Science Framework*. A aplicação do estudo seguirá as recomendações metodológicas da Joanna Briggs Institute, com busca nas bases listadas no texto para identificar estudos que se encaixam no escopo desta revisão. Os estudos serão avaliados por dois revisores independentes, em caso de diferenças no resultado da avaliação dos estudos, um terceiro revisor fará uma nova avaliação. Em relação à divulgação, o conteúdo identificado nesta *Scoping Review* comporá o conteúdo teórico para o desenvolvimento de um software de orientação de cuidados de enfermagem ao paciente idoso nos períodos pré e pós-operatório, que fornecerá orientações voltadas para o incentivo ao autocuidado e à segurança do paciente idoso. Posteriormente, estas orientações serão validadas por meio de um processo de validação.

**Descriptorios:** Revisão; Idoso; Cuidado de Enfermagem ao Idoso Hospitalizado; Tecnologia Biomédica; Enfermagem Perioperatória.

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## Introduction

According to the World Health Organization (WHO), patient safety is related to reducing harm and risks associated with healthcare<sup>1</sup>. The topic becomes relevant as it is responsible for reducing harm to patients through preventive measures such as correct patient identification, hand hygiene, and the use of institutional protocols that seek to guide and raise awareness among professionals to prevent the possibility of errors. Supporting this idea is the theoretical framework known as "The Theory of Human Error" by James Reason, also known as the "Swiss Cheese Model." In his work, Reason describes the appropriate use of incident reports to prevent future occurrences, without blaming the professional involved, and highlighting the need for a complete analysis of the entire organizational system<sup>2</sup>.

Aiming at the prevention of adverse events in healthcare organizations, the World Alliance for Patient Safety was created in 2004. Subsequently, several initiatives were launched and improved, and currently, the Global Action Plan for Patient Safety 2021-2030 is in effect. With seven action structures, the "Safety of Clinical Processes" stands out, encompassing the promotion of initiatives that seek to improve the transition of care at different levels<sup>1</sup>. In Brazil, the National Patient Safety Policy was established in 2013 by the Ministry of Health as part of a global commitment to this emerging issue, highlighting the need for initiatives that empower and engage patients in their healthcare. In this context, in 2023, the WHO focused its annual World Patient Safety Day campaign on the theme of "Patient Engagement"<sup>3</sup>.

From a patient safety perspective, healthcare services require care strategies that should be implemented through programs and resources focused on materials, equipment, and professionals to reorganize the work process and, above all, the integrity of conduct by the multidisciplinary team.

Preserving patient health in professional intervention settings is the responsibility of the healthcare team, which must adopt strategies to prevent harm and minimize risks. The manual for healthcare professionals, created by the Brazilian Network for Nursing and Patient Safety (REBRAENSP), comprises 12 strategies, including: hand hygiene; patient identification; effective communication; fall prevention; pressure injury prevention; safe medication administration; safe use of intravenous devices; safe procedures; safe administration of blood and blood components; safe use of equipment; patients as partners in their own safety; and training of healthcare professionals for safe care<sup>4</sup>.

Therefore, there is a population group of patients who require special attention, such as the elderly. Due to their vulnerable condition, coupled with the emotional burden of hospitalization, the elderly, when hospitalized, exhibit fragility regarding their health and adaptation to new routines<sup>5</sup>.

Chronologically, elderly individuals are defined as those over 60 years of age. Currently, the elderly have an average life expectancy of 80 years, and they represent a significant portion of patients undergoing surgery with a

Surgical procedures are among the events that cause anxiety in humans, leading to fear and worry due to possible complications and negative outcomes. For the elderly, this moment is particularly dreaded, as it can represent a high-risk event, including the possibility of death. In this context, the pre-operative phase, encompassing the time from when the patient decides on surgical intervention until their transfer to the operating table, requires information regarding their biopsychosocial needs, physical preparation, and risk prevention, aiming to prevent post-operative complications that influence their recovery and rehabilitation for a healthy life<sup>7</sup>.

When an elderly person is in the immediate postoperative phase, from the time they leave the post-anesthesia recovery room until their hospital discharge, it is necessary to assess the complexity of the anesthetic-surgical procedure to which the patient was subjected. Therefore, a care plan must be developed by the nurse until the patient is discharged. This is also a critical period, requiring the professional team to pay attention to risk prevention and care management, as in the immediate postoperative period. Key aspects include maintaining the airway, assessing the effects of anesthetic agents, managing hemodynamic complications, observing the surgical wound, ensuring comfort, and relieving pain. Following this, in the intermediate postoperative period, nursing actions focus on supporting the elderly person in their recovery and begin teaching care related to the continuity of treatment, monitoring their condition, and rehabilitation after hospital discharge<sup>8</sup>.

The National Patient Safety Program (PNSP) aims to reduce adverse events and make care safer. Within this premise, the aging population and the need for technologies that assist the elderly in performing self-care during surgical procedures stand out<sup>9</sup>.

Additionally, complications related to a surgical procedure can be avoided using technology, such as the creation of mobile applications, which provide important pre- and post-surgical information in a practical, up-to-date, and efficient way, with the active participation of the user and their companions.

With the intention of investigating this knowledge gap, the guiding question is: "What is described in the scientific literature about the safety of elderly patients in the pre- and post-operative periods of elective surgery at the hospital level, aiming to encourage self-care?". Considering this question, this study aims to map the scientific production on the elderly in the pre- and post-operative period of elective surgery in the hospital environment, aiming to encourage self-care and patient safety, with evidence-based practices, from the perspective of developing safer, more personalized, and humanized care.

## Methodology

The proposed Scoping Review is part of the first stage of a research project, which will be developed in several phases aimed at developing software for patient-



centered care for the elderly during the pre- and post-operative periods; and will be conducted according to the Joanna Briggs Institute (JBI) methodology for scoping reviews<sup>10</sup>. The development of the protocol for the review conforms to the Preferred Reporting Items for Systematic Reviews and Meta-Analyses for Scoping Reviews (PRISMA-ScR) extension and is registered in the Open Science Framework, accessible via the following address: <https://osf.io/72h69>, with DOI number: 10.17605/OSF.IO/72H69.

### Review question

Considering the recommendations for a scoping review<sup>10</sup>, the mnemonic PCC – Population (Qualitative studies; Quantitative studies; Experience reports; Case reports; Case studies and case-control studies; Cohort studies; Randomized controlled clinical trials; Reflection studies) or secondary studies (Non-systematic reviews; Systematic reviews; Meta-analysis; Guides; Manuals; Books; Theses; Dissertations); Concept (Safety of elderly patients in the pre- and post-operative period of elective surgery) and Context (Hospital setting, with encouragement of self-care) - was used to formulate the following research question: “What is described in the scientific literature about the safety of elderly patients in the pre- and post-operative period of elective surgery at the hospital level, aiming at encouraging self-care?”.

This review will seek to describe the main strategies for increasing the safety of elderly patients in the pre- and post-operative periods, answering the following sub-questions:

- What guidance strategies are being used to encourage self-care in older adults during the pre and post-operative periods of elective surgery in a hospital setting (e.g., content, frequency, duration of explanation, explanation methods)?
- What facilitators and/or barriers have been reported regarding the success and/or failure of the guidance?
- Who are the older adults receiving pre- and post-operative guidance for elective surgery in a hospital setting?
- In what specific context is guidance provided to older adults during the pre and post-operative periods of elective surgery in a hospital setting?
- Does the guidance alter the care process for older adults during the pre and post-operative periods of elective surgery in a hospital setting?

### Participants

This scoping review will consider the literature on elderly individuals aged 60 years or older, both male and female, who may have received or are receiving pre and post-operative interventions for elective surgery.

### Inclusion criteria

- Studies that present the necessary components for self-care and safety of elderly patients in the pre- and post-operative periods of elective surgery.

- Literature published since 2013, the beginning of the National Patient Safety Program (PNSP), a milestone in the field in Brazil, defining clear protocols and guidelines to ensure patient safety in hospitals, whose objective is to support and promote the implementation of initiatives for safe care.
- Studies in Portuguese, English, and Spanish will be considered for inclusion.
- Qualitative studies; Quantitative studies; Experience reports; Case reports; Case studies and case-control studies; Cohort studies; Randomized controlled clinical trials; Reflection studies) or secondary studies (Non-systematic reviews; Systematic reviews; Meta-analysis; Manuals; Books; Theses; Dissertations.
- Studies from the Brazilian Association of Surgical Center, Anesthetic Recovery and Central Material and Sterilization Nurses (SOBECC), as it is a major reference in the surgical area in the country.
- The literature will be excluded if the interventions are not exclusively for the elderly in the pre- and post-operative period of elective surgery and are not at the hospital level.

### Exclusion criteria

- Articles that are duplicated in the literature will be discarded.
- Articles that are not freely accessible.
- Studies that do not directly align with the central research question will also be excluded, ensuring the relevance and specificity of the data collected.

### Concept

This review will consider the literature that reports on strategies for guiding the safety of elderly patients in the pre- and post-operative periods of elective surgery in the hospital setting, aiming to encourage self-care. For the purposes of this review, patient safety, according to the World Health Organization, is defined as reducing the risk of unnecessary harm associated with healthcare to an acceptable minimum<sup>11</sup>. In Brazil, there is the National Patient Safety Program (PNSP), which aims to reduce adverse events and make care safer<sup>9</sup>.

Based on these concepts, actions that provide safer and more effective care are fundamental. Studies focused on patient safety and the use of technologies such as apps can contribute to the search for accurate information in a more agile way, and can serve as barriers to prevent errors, thus contributing to safe care<sup>12</sup>. Given this premise, it is worth highlighting the aging population and the need to develop technologies that help the elderly to perform self-care during their surgical procedures.

Therefore, studies on this topic are necessary, such as this Scoping Review, which allows the researcher to explore in depth the literature on pre- and post-operative care for the elderly, mapping and summarizing the evidence



to identify gaps and provide a basis for the content of the prototype mobile application<sup>9,13</sup>.

In this study, elective procedures were chosen because they are scheduled interventions, without an urgent or emergency character, facilitating the inclusion of elderly patients in the studies<sup>14</sup>. Therefore, literature on strategies for guiding the elderly in the pre- and post-operative period of elective surgery in the hospital setting, as well as strategies for pre- and post-operative guidance that do not encompass the elderly or the hospital environment, will be excluded from this review.

The analysis of the guidelines formed the basis for designing and developing a prototype with the necessary information for elderly patients in the pre- and post-operative periods of elective surgery, encouraging self-care

**Context**

This review will consider literature focused on patient safety guidelines for elderly patients in the pre- and post-operative periods of elective surgery, conducted exclusively in hospitals. Literature will be included regardless of geographic location, without specific criteria based on race or gender.

**Types of evidence sources**

This Scoping Review will consider study designs using quantitative, qualitative, and mixed methods; reviews, conference abstracts, experience reports, manuals, books, and guidelines will not be considered.

**Chart 1.** Description of search strategies according to databases. Florianópolis, SC, Brazil, 2021

Source of information	Search strategy
BVS; SciELO; Capes Thesis Portal; BDTD	((Autocuidado OR autoajuda OR Autoayuda OR "Self Care" OR "Self-Care") AND (educação OR educación OR education) AND (Idoso OR Idosa OR "Pessoa de Idade" OR "Pessoas de Idade" OR Centenários OR Nonagenários OR "Octogenários" OR Velhíssimos OR Anciano OR "Adulto Mayor" OR "Persona de Edad" OR "Persona Mayor" OR "Personas de Edad" OR "Personas Mayores" OR Viejísimos OR Eldery OR Aged OR Centenarian OR Centenarians OR Nonagenarian OR Nonagenarians OR Octogenarian OR Octogenarians OR "OldestOld") AND ("Cuidados Pré-Operatórios" OR "Assistência na Fase Pré-Operatória" OR "Assistência no Período Pré-Operatório" OR "Assistência Pós-Operatória" OR "Cuidados pré-cirúrgico" OR "Cuidados Pós-Operatórios" OR "Assistência Pós-Operatória" OR "Assistência na Fase Pós-Operatória" OR "Assistência no Período Pós-Operatório" OR "Cuidados Preoperatorios" OR "Cuidados Posoperatorios" OR "Asistenciaenel Período Posoperatorio" OR "Asistenciaenel Período Postoperatorio" OR "AtenciónPosoperatoria" OR "AtenciónPostoperatoria" OR "Cuidados Posquirúrgicos" OR "Cuidados Postoperatorios" OR "Cuidados Postquirúrgicos" OR "Preoperative Care" OR "Preoperative Procedure" OR "Preoperative Procedures" OR "Postoperative Care" OR "Postoperative Procedures" OR "Postoperative Procedure"))).
SCOPUS; WOS; CINAHL; COCHRANE; EMBASE; NDLTD, OADT; PQDT Global	((("Self Care" OR "Self-Care") AND (education) AND (Eldery OR Aged OR Centenarian OR Centenarians OR Nonagenarian OR Nonagenarians OR Octogenarian OR Octogenarians OR "Oldest Old") AND ("Preoperative Care" OR "Preoperative Procedure" OR "Preoperative Procedures" OR "Postoperative Care" OR "Postoperative Procedures" OR "Postoperative Procedure"))).
Google Scholar	((autocuidado) AND (educação) AND (Idoso) AND ("Cuidados Pré Operatórios" OR "cuidados pós-operatórios"))).
PUBMED	((("Self Care" OR "Self-Care" OR "Self Care"[Mesh]) AND (education) AND ("Aged, 80 and over"[Mesh] OR "Aged"[Mesh] OR "Eldery" OR "Aged" OR "Centenarian" OR "Centenarians" OR "Nonagenarian" OR "Nonagenarians" OR "Octogenarian" OR "Octogenarians" OR "Oldest Old") AND ("Preoperative Care"[Mesh] OR "Preoperative Care" OR "Preoperative Procedure" OR "Preoperative Procedures" OR "Postoperative Care"[Mesh] OR "Postoperative Care" OR "Postoperative Procedures" OR "Postoperative Procedure"))).

**Search strategy**

The search strategy will include primary studies published in the following databases: CAPES Brazil Thesis Database; Virtual Health Library (BVS) with access to the following databases: Medline, Latin American and Caribbean Literature in Health Sciences (LILACS), Nursing Database (BDENF), Spanish Bibliographic Index in Health Sciences (IBECS), Peruvian Network of Health Libraries (LIPECS), Cumulative Index to Nursing and Allied Health Literature (CINAHL); COCHRANE Library; EMBASE; Google Scholar;

Networked Digital Library of Theses and Dissertations (NDLTD), Open Access Theses and Dissertations (OADT); Brazilian Digital Library of Theses and Dissertations (BDTD); Medical Literature Analysis and Retrieval System Online (PUBMED), Scientific Electronic Journal Online (SciELO), SciVerse Scopus (SCOPUS), Web of Science. For each database, an appropriate search strategy was developed, including all identified keywords and indexing terms, adapted to each information source included. Chart 1 presents the search strategy for each database.



Ferreira JM, Alvarez AM, Tourinho FSV, Grolli RE, Fabrizio GC, Spereta ED be classified according to the categories generated in the research that answer the questions of the protocol. A narrative summary of the text will accompany the tabulated results and describe the characteristics of the body of literature obtained/identified related to guidelines for elderly individuals in pre- and post-operative conditions undergoing elective surgery in a hospital setting.

### Screening and selection of evidence

The screening and selection of studies will be carried out by two independent reviewers, and in any case of disagreement, a third reviewer will be consulted. After the search, all identified records will be grouped and uploaded to Microsoft Word®, and duplicates will be removed using Mendely software.

Subsequently, a review of titles and abstracts will be conducted based on the inclusion criteria, followed by a full-text reading, considering potentially relevant evidence for further review in relation to the protocol's inclusion criteria. The reasons for excluding full-text articles that do not meet the inclusion criteria will be recorded and reported in the scoping review. The description of the study selection process is presented in narrative and flowchart format, according to PRISMA-ScR<sup>10,15</sup>.

### Analysis and presentation of results

The results will be described using tables developed and refined throughout the data extraction phase to reflect the purpose and objective of the review. They will

### Ethics and disclosure

This study does not require ethical approval, as it uses publicly available materials; however, it will follow ethical standards and scientific writing, complying with and referencing the thoughts and knowledge produced by other authors, using published materials available in publicly accessible databases. Regarding dissemination, the content identified in this scoping review will form the theoretical basis for the development of a nursing care guidance software for elderly patients in the pre- and post-operative periods, providing guidance aimed at encouraging self-care and the safety of elderly patients.

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