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# The medical librarian's roles in the patient education process: A scoping review protocol

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## Abstract:

**BACKGROUND:** The presence of medical librarians in the patient education team can greatly facilitate the patient education process. Expanding the role of medical librarians in patient education and using them in this process requires understanding the roles and services they can provide. This scoping review aims to identify different traditional and modern services and roles that medical librarians provide specifically in the patient education process.

**MATERIALS AND METHODS:** A scoping review protocol is reported, according to the Preferred Reporting Items for Systematic Review and Meta-Analysis Protocols statement and guided by The Joanna Briggs Institute. PubMed, Scopus, Web of Science, and LISTA (Library, Information Science & Technology Abstracts) will be searched. A grey literature search and hand-searching of citations and reference lists of the included studies will also be undertaken. Studies with their full text are not available and are in languages other than English will be excluded. Two independent reviewers will screen titles/abstracts and full text of retrieved articles and eligibility disagreements within a pair will resolve by discussion or a third reviewer. Data charting will be done in accordance with the data extraction tool made in Excel. Findings will be presented as a narrative summary supported by tables and diagrams.

**CONCLUSIONS:** Identifying the different services that medical librarians provide in the patient education process leads medical librarians to inform about the different services they can provide in the patient education process and to expand their roles as well as policymakers and hospital managers to be aware of these roles and use medical librarians in the patient education process appropriately. It also helps the general public and patients to learn about the services that medical librarians can provide them in this process.

## Keywords:

Health education, health information professionals, medical librarian, patient education, professional role, scoping review

## Introduction

The health system's sustainability depends in part on the ability of individuals to manage and participate in their care.<sup>[1]</sup> The increasing prevalence rate of chronic diseases and the vital role of self-management in controlling such diseases shows the importance of patient education even more.<sup>[2,3]</sup>

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As a result of changing in patient education paradigm toward a more proactive and bidirectional approach over the past four decades, patients are playing more active roles in this process.<sup>[4]</sup> Such participation and involvement require that the patient and his family have an information base to use in decision-making and when the patients are well informed, they are more likely to take an active role in their care.<sup>[5,6]</sup> Along with the patients, other professionals

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participate in the patient education process, and among them, medical librarians because of the unique skill set can bring to the table in terms of their ability to identify, select, organize, and disseminate healthcare information.<sup>[7,8]</sup>

Medical librarian in this study means Health information professionals as a group of library specialists, often including information professionals, librarians, or informaticists who have special knowledge of quality health information resources.<sup>[9]</sup> Medical librarians, also known as “informationists” or “clinical knowledge workers”, are an integral part of patient-clinician interactions<sup>[10]</sup> and have had a role in finding information and providing it to patrons. The patron can be anyone from healthcare providers such as doctors, nurses, and pharmacists to consumers such as patients, caregivers, friends, and family.<sup>[6,11]</sup>

It seems that despite the roles that librarians can play to facilitate patient education barriers such as the lack of time for doctors and nurses, the heavy workload of nurses, and the lack of appropriate educational materials,<sup>[12]</sup> in many cases the role and importance of medical librarian present in the patient education team is not considered. On the other hand, if librarians get familiar with functions that they can participate in the patient education process, they can provide better support to patients, families, and healthcare professionals; so, it seems necessary to conduct a scoping review to identify all services (traditional and modern) of medical librarians in patient education process from patient admission to hospital discharge.

According to our literature review, some studies describe the role of librarians in patient care,<sup>[13-15]</sup> but no current or underway systematic reviews or scoping reviews on medical librarians' role specifically in the patient education process were identified. So, the present study aims to identify services and roles that medical librarians provide specifically in the patient education process.

### Review questions

The questions for the proposed scoping review are as follows:

1. What are the services that medical librarians provide for patient education?
2. What is the role(s) of medical librarians in patient education activities?

### Inclusion criteria

The inclusion criteria, defined based on the mnemonic “PCC”, according to the Joanna Briggs Institute (JBI) recommendations for scoping reviews, were as follows:

### Participants

In our research, medical librarians mean to Health information professionals as a group of library specialists, often including information professionals, librarians, or informaticists who have special knowledge of quality health information resources and we will not be focusing on a particular characteristics (i.e. there will be no restriction on age, gender, nationality, etc.).

### Concept

The concept of patient education will consider as any services provided by medical librarians in response to requests from the general public, including patients and their families. In other words, we consider any direct involvement of librarians in this process and consider articles in which medical librarians are a member of the patient education team or collaboration with health professionals in line with patient education.

### Context

This scoping review will consider different types of healthcare institutions (including clinics, hospitals, etc.) in which medical librarians provide patient education services. Our study scope is global and not limited by timeframes or geographical regions.

### Types of studies

The proposed scoping review will cover all study designs (quantitative, qualitative, and mixed method) that are related to medical librarian services in the patient education process. Additionally, all types of review articles, meta-analyses, guidelines, commentaries, and letters to the editor that meet the inclusion criteria will also be considered and there are no restrictions on the types of studies eligible for inclusion.

## Materials and Methods

Although the purpose of this study is to examine general evidence on the roles of medical librarians in the patient education process, this type of review study was selected. The proposed scoping review will be performed in accordance with the Joanna Briggs Institute's methodology for scoping reviews<sup>[16]</sup> and our final publication will be reported in accordance with JBI methods and the Preferred Reporting Items for Systematic Reviews and Meta-Analysis Extension for Scoping Reviews.<sup>[17]</sup>

### Search strategy

The three-step search strategy will be implemented as recommended by the JBI.<sup>[16,17]</sup> We tested various peer-reviewed database search terms and retained the most relevant terms to create an effective and efficient search strategy. The search terms used to identify relevant studies in searched databases include all

relevant terms which have been used in the health area for medical librarians; besides that, equations that are used for the concepts of role and patient education [Appendix 1]. Searches were executed by two expert medical librarians (M.H. and F.A.). The databases to be searched include PubMed, Scopus, Web of Science, and LISTA in the periods of database inception to November 2022. The search strategy will be adapted for each database [Appendix 2].

To investigate the grey literature perspective of this research topic, comprehensive searches were conducted on the Web of Science to include all publication types such as conference proceedings, research and other reports, and thesis or dissertations. Thesis and dissertations will also be searched in ProQuest and Open Thesis and Dissertation. Related conferences in the European Association for Health Information and Libraries and IFLA (International Federation of Library Associations and Institutions) will also be reviewed. The World Health Organization website also will be checked for any related organizational studies and reports. A hand search of the conference abstracts for MLA (USA), CHLA (Canada), ALIA (Australia), and CILIP-HLG (UK) and a targeted Google search to be less biased toward Western/English-speaking countries will be done additionally. We will also check the bibliographies of studies found through the databases searches to identify relevant studies not captured by other methods. Google Scholar will be searched to ensure access to related studies.

### Study selection

After conducting the search using the determined search strategy, citations will import into EndNote X20.4.1 (Clarivate Analytics, US) and remove duplicates by manual inspection aided by the EndNote duplicate identification feature. Two reviewers (F.A. and M.H.) independently will examine the titles and abstracts for the presence of inclusion criteria. Eligible studies will be retrieved in full text to see whether they potentially meet the inclusion criteria or if the abstract is unclear or if the study's relevance is uncertain. The full text of the selected citations will be assessed in detail against the inclusion criteria by two independent reviewers (F.A. and M.H.). Eligibility disagreements within a pair will resolve by discussion with a third reviewer and team meetings (H.A. and P.Kh.). Full-text studies will be excluded if they did not meet the inclusion criteria. The results of our search strategy and selection process following the Preferred Reporting Items for Systematic Reviews and Meta-Analysis guideline<sup>[18]</sup> will be presented in a flow diagram form.

### Data charting

Data related to the librarian's role and their services in the patient education process will be extracted

from articles eligible to be included in this study. Data will be systematically charted using the data charting form developed in Microsoft Excel [Appendix 3]. Two reviewers will extract information from articles independently and discuss any discrepancies until they reach a consensus. If required, the final decision will be made after consulting with other team members (H.A. and P.Kh.). To ensure consistency of data extraction, two reviewers independent of one another will perform *a priori* pilot charting of the first five to 10 studies.<sup>[19]</sup> The variables extracted from the final set of all documents included:

- Study details include title, author (s), article type, aims/purpose, year of publication, and geographic location.
- Service recipients (consumer or patients and their families and healthcare professionals).
- Kind of services and role (s) played by librarians.
- Important results.

### Data analysis and presentation

Tables and diagrams will be used to present the extracted data. Tables will summarize basic information about included articles and present different medical librarians' services and roles in the patient education process, the groups who received these services, and the important results. This review will also aim to present a diagram of outlying services that medical librarians served or the roles they played in the patient education process. A descriptive summary will be provided regarding the charted results in alignment with this scoping review's objective.

### Ethical consideration

Ethical approval has been obtained from the ethics committee of Isfahan University of Medical Sciences (IR.MUI.RESEARCH.REC.1399.573).

### Strengths and limitations of this study

This scoping review will be the first scoping review that identifies the different traditional and modern services and roles that medical librarians provide specifically in the patient education process.

Our scoping review will conform to the rigorous methodology manual by the Joanna Briggs Institute. However, there will be no formal assessment of the study quality.

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### Conflicts of interest

There are no conflicts of interest.

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### Appendix 1: Keywords and synonyms

Keyword	MeSH term	Synonyms	Search line
Medical librarians	Librarians Libraries, Medical	Librarian librarians Clinical librarians Clinical librarian Clinical medical librarians Clinical medical librarian Nursing librarian Nursing librarians Clinical informationists Clinical informationist Information Specialists Information Specialist Health science librarians Health science librarian Hospital librarians Hospital librarian	((clinical OR medical OR nursing OR health OR hospital) AND (librarian* OR informationist*))
Patient education	Patient Education as Topic	Education, Patient Patient Education Education of Patients	((Patient* OR medical OR health OR caregiver* OR family) AND education*)

### Appendix 2: Search Strategy

Database	Search strategy	Results	Date of search
PubMed	((clinical[tiab] OR medical[tiab] OR nursing[tiab] OR health[tiab] OR hospital[tiab]) AND (librarian*[tiab] OR informationist*[tiab])) AND (("Patient Education as Topic"[mesh] OR Patient*[tiab] OR medical[tiab] OR health[tiab] OR caregiver*[tiab] OR family[tiab]) AND education*[tiab]))	721	23 March 2023
Scopus	TITLE-ABS(((clinical OR medical OR nursing OR health OR hospital) AND (librarian* OR informationist*)) AND ((Patient* OR medical OR health OR caregiver* OR family) AND education*))	1,027 (50 conference paper)	23 March 2023
WOS	TS=(((clinical OR medical OR nursing OR health OR hospital) AND (librarian* OR informationist*)) AND ((Patient* OR medical OR health OR caregiver* OR family) AND education*))	846 (51 proceedings)	23 March 2023
LISTA	AB(((clinical OR medical OR nursing OR health OR hospital) AND (librarian* OR informationist*))) AND AB(((Patient* OR medical OR health OR caregiver* OR family) AND education*))	930	23 March 2022
	TI(((clinical OR medical OR nursing OR health OR hospital) AND (librarian* OR informationist*))) AND TI(((Patient OR medical OR health OR caregiver* OR family) AND education*))	75	23 March 2022

### Appendix 3: Collating, summarizing and reporting the results

Study details						Service Recipients				Kind of Services	Important Results
Title	Author (s)	Article type	Aim/purpose	Year	Location	Kind of diseases	Age	Sex	Gender		