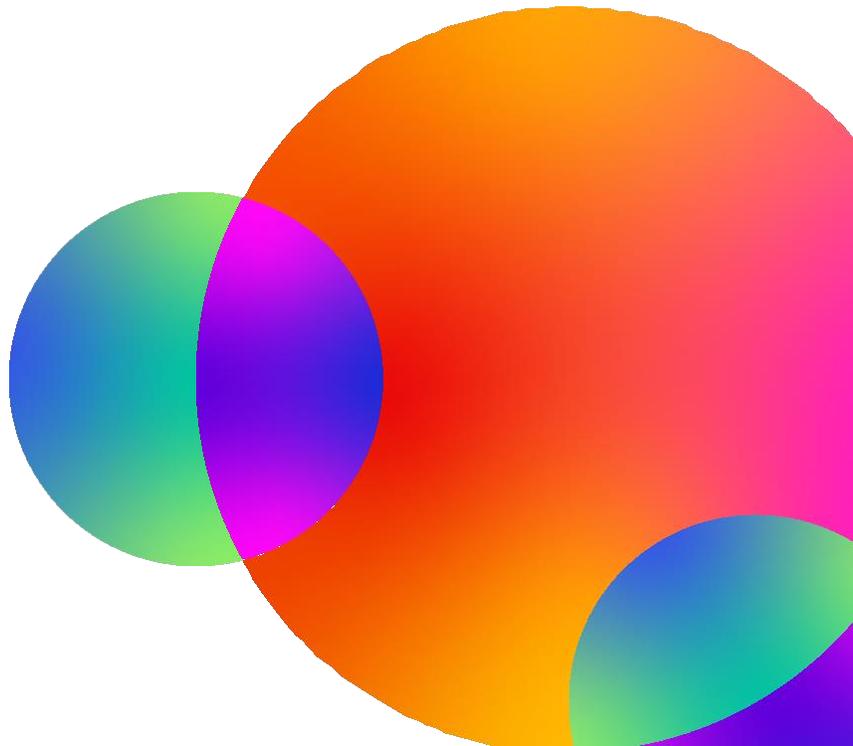


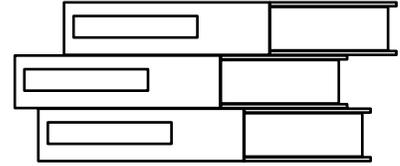
# Vendor Policy Template



# Overview

(Organization) has set forth the following guidelines to outline safe and effective practices for vendors and its representatives while adhering to regulatory guidelines. These guidelines have been created to assist and direct all vendor representatives and those who do business with (company). The overall goal of these vendor guidelines is for (organization) to provide a safe and ethical environment for patients, physicians, employees, etc.

# Definitions



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- a (Organization) is (organization) name and all organizations directly or indirectly controlled by (organization).
  - b (Organization) representative(s) is/are employees of (organization) who provide services in exchange for compensation and receives a W-2 from (organization).
  - c Vendor is an organization or entity that produces and/or sells a product for which (organization) may currently use, require additional knowledge or training of, or are interested in purchase/adoption for (organization).
  - d Vendor representatives are a sales or service professional who represent an organization or entity and likely promotes and/or sells a product for which (organization) may currently use, require additional knowledge or training of, or are interested in purchase/adoption for (organization).

# Policies and Guidelines



## 1. Prior authorization

- a. Vendor representative will only receive approved access to (organization) if they have a scheduled in-person or virtual appointment
- b. All visits will be restricted to the department for which the vendor representative has a confirmed appointment. Vendors must receive explicit approval of the (organization) representative department head or his/her designee in advance to meet with staff from other departments within (organization).
- c. When submitting an appointment request, vendors should always include the reason for the visit, as well as any pertinent information.
- d. For virtual engagements, vendors should include the meeting link or conference call line in the appointment request.

## 2. Vendor access requirements

In order for vendor representative to gain access, there must be documentation or attestation of the following:

- a. HIPAA acknowledgment
- b. COVID-19 vaccination compliance or exemption
- c. Background check
- d. Valid identification
- e. Prior authorization from (organization) representative
- f. Vendor representative is in good standing with (organization)

### 3. Vendor access levels and criteria

- a. **Level 1 - All-Access**  
Provides full access (virtual and on-premise) to facility and staff, including patient care and procedure areas.
- b. **Level 2 - Patient Care Access**  
Provides access to engage with (organization) in patient care areas or areas where access to Protected Health Information is available. This does not provide access to any procedure areas.
- c. **Level 3 - Administrative Access**  
Provides access (virtual and on-premise) to general facility areas. No access to procedure or patient care areas.
- d. **Level 4 - Provider Access**  
Provides basic access (virtual and on-premise) to a physician office and pharmacy only.

### 4. Badge/ID requirements

- a. Prior to any interaction with (organization)'s staff, the vendor representative must check-in using their symplr account, and if on-premise, obtain a vendor identification badge. When on-premise, the badge must be worn visibly for the entirety of the visit. If virtual, the vendor's check-in through the symplr app can be reviewed via the check-in dashboard prior to the start of the meeting.
- b. If a vendor representative appears in any (organization) department without an identification badge, an (organization) representative will ask the vendor representative to leave. The vendor representative can only return once they have the appropriate identification

## 5. Access to patient areas and patient information

- a. Vendor representatives are not permitted in patient care areas, nursing units, in the emergency room, in outpatient clinics or other patient treatment areas where patient care is provided unless specifically requested.
- b. Vendor representatives are not permitted in physician lounges unless expressly invited by a physician.
- c. Vendor representatives are only permitted to access the minimum amount of protected health information required to provide care, as permitted by HIPAA guidelines.
- d. Patient privacy is paramount. Vendor representatives will keep all patient information (names, diagnosis, status, etc) strictly confidential. Violation of patient privacy will be considered a severe breach of conduct.

## 6. Check-in and check-out procedures

- a. Vendor representatives are required to check-in using their symplr app before any approved appointment, allowing staff enough time to review their credential status and reason for the appointment. Failure to check out will be noted on the vendor representative's profile. Continuous failure to check out will result in the vendor being denied access to (organization).

## 7. Miscellaneous vendor behavior parameters

The following vendor behavior parameters support a safe and private environment for patients while fostering a professional and ethical relationship with vendors.

- a. Selling and promotional activities are prohibited.
- b. Photos/video are prohibited unless approved by (organization) and photo/video release(s) for any subjects are obtained.
- c. Vendors are not permitted to provide food, gifts, or any items of monetary value to (organization) employees, patients, etc., while visiting (organization)
- d. During all interactions of staff members of (Organization), vendor representatives are required to exhibit professional and respectful behavior.
- e. Vendor representatives will not enter patient care areas if they have signs of illness, including but not limited to: sore throat, fever, runny nose or rash.
- f. Vendor representatives must review and abide by (organization) parking policies for any visit.
- g. If dropping off approved samples and/or products, vendor representatives may not access the facility beyond the front desk of the site or department.

## 8. Vendor policy adherence

- a. The aforementioned policies are required to conduct business with (organization). Failure to do so may result in vendor privileges being revoked. (See vendor policy infraction for additional information)

## 9. Vendor policy infraction

- a. **First infraction:**  
(organization) leader or designee will counsel the vendor and inform the representative's supervisor as to the provisions of the breached policy/policies and the consequences of future infractions.
- b. **Second infraction:**  
Documentation of breach in policy is required. A letter will be sent to the vendor representative's supervisor. Documentation may include a request for the assignment of a different vendor representative.
- c. **Third infraction:**  
The vendor representative will lose (organization) visitation privileges.

## 10. Acknowledgment

I (we) have read the above and agree.

Print Name:

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Organization and Contact Information:

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Date: \_\_\_\_\_

Signature: \_\_\_\_\_

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