



## Policy: Vendor Representatives, Standards of Conduct and Management

Effective: 12/06/22

Identifier: S-FW-EC-1155

Acute Care: ENC ☒ GR ☒ LJ ☒ MER ☒

Ambulatory ☒ SHAS ☒

**PURPOSE:** To establish the acceptable rules of conduct for vendor representative, as determined by Scripps and in a manner that will minimize interruption of patient care, support patient safety, staff productivity, and that vendor contracts are consistent with Scripps business practices. Individuals considered direct patient service vendors are not subject to this policy.

### I. DEFINITIONS

- A. **Vendor Representative:** for the purpose of this policy includes any representative or contracted personnel of a manufacturer, distributor, or company who visits the facility for the purpose of, carrying out a service, soliciting, marketing, or distributing information regarding the use of medications, products, technical information systems, equipment, or services (e.g., general contractor, food service vendor, pharmaceutical representative).  
*Refer to Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157, Attachment A.*
- B. **Direct patient service vendors** are vendor/agency staff members who come to the hospital to provide patient education or arrange post discharge services. Individuals in this group are performing a function for the purpose of continuity of care upon agreement or request of the patient. *Refer to Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157, Attachment A.*
- C. **Scripps Sponsor:** Refer to *Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157.*
- D. **Patient Care Area:** Refer to *Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157.*

### II. POLICY

- A. All vendor presence and interaction in a Scripps facility must be done under the accountability of a Scripps Sponsor. Vendors are not permitted in patient care areas unless accompanied by a Scripps Sponsor.
- B. Access requirements are established (e.g., minimum identity, health, and safety requirements) for each category of personnel and visit type, in Scripps policy *Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157, Attachment A.*
- C. Vendors whose requirements have expired are not permitted in Scripps patient care facility's until valid documentation is provided.
- D. Vendors without an appointment will not be allowed into a Scripps patient care facility. They will be given the opportunity to call and make an appointment.
- E. Staff is required to report vendors who visit an area without an appointment and/or vendor pass.
- F. Scripps sponsors are responsible for:
  - 1. **Validating Vendor Requirements:** refer to *Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157, Attachment A.*
  - 2. **Vendor Activity Oversight:**

- a. **Role:** Notify all staff that the role of the vendor role during a procedure is to provide product consultation, or to answer questions and make technical adjustments to equipment/devices deemed essential for patient care only at the direction of the physician
- b. **Vendor Solicitation:** Vendor Representatives are not permitted to solicit
  - i. Scripps patients or visitors at any time
  - ii. Employees or physicians when in patient care areas.
- c. **New Products and Equipment:**
  - i. Prior to utilization, Scripps Value Analysis process, which includes review of both clinical evidence and financial impact, must vet all:
    - a) New patient implantable devices
    - b) New Disposable products
    - c) Trials and evaluations, including investigational devices, billable procedures
    - d) Any new equipment never used at a Scripps facility.
    - e) Any equipment obtained for free due to purchases of its supporting consumable products.
  - ii. Supply Chain Management requires that all vendor invoices or delivered goods forms be provided within 24 hours after the case is completed through the online bill only management tool.
- d. **Bio Medical Equipment Requirements:**
  - i. All equipment must be in the facility 24 hours before a case, to be approved, inspected and stickered by Biomedical Engineering.
  - ii. Biomedical Engineering will not approve the use of any medical equipment without proper documentation or if the scheduled/preventative maintenance cycle has expired. *Maintenance documentation must accompany the equipment and include one of the following:*
    - a) Latest scheduled/preventative maintenance that has been performed in the time frame recommended by the manufacturer or
    - b) No maintenance is required or
    - c) Device is too new to have had scheduled/preventative maintenance
- e. **Supply Chain Requirements:**
  - i. Supply Chain will contact the Vendor/Representative prior to case through on-line tracking software.
  - ii. Vendor/Representative will confirm their availability for the case and any special supplies or equipment to Coordinator/Specialist a minimum of 48 hours prior to case through online tracking software.
  - iii. For add on cases, Supply Chain will contact Vendor/Representative once case has been scheduled. For add on cases less than 24 hours prior to the case, supplies and equipment that is in house will be used.
- f. **Sterile Processing Department Requirements:**

- i. All instrument trays, including loaners and consignment, must be ready for inspection or brought into the facility **48 hours before** any surgical procedure to be sterilized and properly inspected by SPD.
- ii. All instrument trays must be free of bioburden, in good condition, and checked for completeness before each case.
- iii. Loaner trays must weigh less than 25 pounds
- iv. Loaner trays must be picked up within 24 hours after the completion of a case. If the loaner trays are missing instruments or are damaged, this must be reported to SPD leadership *prior to removal* of the trays from the facility. Vendor must notify SPD leadership if there will be a delay in picking up the tray. Scripps will not be held accountable for missing or damaged instruments if tray is not picked up within 2 business days of completion of case.
- g. **Product/Equipment Training:** Vendors providing training (e.g., newly purchased equipment or device) in a patient care area must be accompanied by or be under the direct supervision of a Scripps Sponsor.
- h. **Vendors Providing Consultation:** (e.g., product consultation, device technical adjustments, or to answer questions deemed essential for patient care)  
*Under no circumstances will a vendor be permitted to:*
  - i. Participate in hands on delivery of patient care (e.g., scrub)
  - ii. Operate equipment and/or administer supplies, outside of technical adjustments at the direction of the physician.
  - iii. Provide initial training of equipment and/or supplies during a procedure
  - iv. Discuss patient information, or share patient information with anyone
- i. **Distribution of Promotional Materials:** Distribution, posting, or leaving any type of printed or handwritten material, advertisements, signs, or other such promotional materials anywhere on Scripps premises is prohibited.  
Educational, promotional, or informational materials may not be given to physicians and staff unless explicitly requested.
- j. **Patient Educational Materials:** Vendors are strictly prohibited from providing educational materials of any kind directly to patients, their families or leaving these materials in areas accessible to patients.
- k. **Pricing Information:** Vendors shall not provide comparative pricing information in their literature or in their discussions with Scripps personnel.
- l. **Noncompliance:** Vendor requirements are monitored by Scripps Sponsors and Supply Chain Management. Violations may result in the following:
  - i. Notification to the vendor's parent company
  - ii. Temporary or Permanent restrictions of visitation privileges
  - iii. Escalation to the appropriate care line for further direction.
  - iv. Termination of future business
  - v. Prosecution

### **III. PROCEDURES**

- A. Direct all new vendors to Supply Chain Management for information on the registration process.
- B. Instruct vendors to check in at a designated location:
  - 1. Vendors using the on-line vendor credentialing system will: check in through area kiosk. In the event the on-line vendor credentialing system is not working, sign in at a location identified by the site they are visiting. Confirm with onsite Security the appropriate location to sign in if unknown.
  - 2. Vendors not managed in the on-line vendor credentialing system will sign in at a specified site location. Confirm with onsite Security the appropriate location to sign in.
  - 3. Vendors must sign into logbook at control desk.
- C. If vendor will be present during a procedure, they must have prior approval by the Department Directors who must validate the following:
  - 1. 24-hour advance notification of vendor request from the physician.
  - 2. Equipment approval and sticker by Biomedical Engineering.
  - 3. Staff and physician have received training from vendor prior to use.
  - 4. Proper identification of vendor (as defined in Scripps policy *Access to Patient Care Facilities, Non-Employee Requirements for, S-FW-EC-1157*)
  - 5. Vendor orientation to area
- D. Departmental leadership (i.e., supervisor, manager) are responsible for:
  - 1. Patient privacy, vendor is not allowed into procedural room until patient has been positioned and draped.
  - 2. Limiting vendor access to confidential patient information to minimum necessary.
  - 3. Limiting vendor presence in sterile environment and/or traffic of vendor in and out of sterile environment. Only one representative for each company to be present during a surgical/procedural case. Additional representatives must be approved in advance by a Scripps Sponsor.

### **IV. RELATED PRACTICE DOCUMENTS**

- A. Access to Patient Care Facilities, Non-Employee Requirements; [S-FW-EC-1157](#)
- B. Acquisition of Goods and Services, Management of; [S-FW-LD-6001](#)
- C. Information System, Non-Employees Access; [S-FW-IM-3004](#)
- D. Badge, Identification and Access; [S-FW-EC-2003](#)
- E. Solicitation And Distribution; [S-FW-HR-0907](#)
- F. Confidentiality Of Information (Patient, Financial, Employee, And Other Sensitive And Proprietary Information); [S-FW-IM-0201](#)
- G. Vendors, Pharmaceutical Service Representatives, Relations; [S-FW-EC-1156](#)
- H. Conflict of Interest and Conflict of Commitment; [S-FW-LD-1013](#)

### **V. RELATED FORMS**

Authorized Affiliate Confidentiality and Non-Disclosure Agreement; [SW-IM-0201 C](#)

**VI. ATTACHMENT**

How to Get Started Working with Scripps as a Vendor

**VII. SUPERSEDED**

Vendor Representatives, Standards of Conduct and Management; S-FW-EC-1155, 01/20

Document Chronology		
Original: 04/11	Revised: 09/13, 10/16, 04/17, 01/20, 11/22	Reviewed: 08/13
DEVELOPMENT SUMMARY		
<b>04/24 Attachment</b> updated to reflect current process, S. Griffin 04/10/24		
<b>11/22 Revised:</b>		
<ul style="list-style-type: none"><li>The vendor must notify SPD leadership before removing a loaner tray that has missing or damaged instruments to reconcile together.</li><li>Added a new section to align with current process - Supply Chain contacts vendors prior to cases to get any special supplies or equipment needs</li><li>We removed the vendor specific name RepTrax and changed to vendor credentialing system.</li></ul>		
Development Workgroup		
Representation	Member Name	Member Title/Discipline
Owner/Workgroup Leader	Stacy Griffin	Director, Supply Chain Logistics
Workgroup Member	Kevin Meldrum	Manager, SPD
Workgroup Member	Anthony Roman	Director, Support Operations
Workgroup Member	Rykiel Pratt	Manager, Biomed Engineering
Workgroup Member	Diana Totman	Director, Clinical Care Line Supply Chain Mgmt.
Workgroup Member	Steve Peterson	Sr. Director, Facilities/Support Ops
Workgroup Member	Fausto Bustamante	Director, Corp Biomed Engineering
ENDORSEMENTS and APPROVALS		
Function	Chair Name/Title/Position	Dates
Executive Sponsor	Tina Pickett, Corp. VP Facilities and Support Services	11/15/22
Surgical Services Care Line	Lisa Risser, Corp. SVP, Ancillary Services	11/08/22
Acute Care Operations and Clinical Excellence	Ghazala Sharieff, MD, Corp. SVP, CMO Acute Care Operations and Clinical Excellence	11/15/22
Executive Cabinet	Chris Van Gorder, President & CEO	11/29/22

**As a Vendor: How to Get Started**

- If you are a brand-new vendor for a Scripps location, please contact the hospital's Supply Chain Department and ask for the new vendor registration information.
- Vendor representatives wanting to conduct business at any Scripps facility are required to go to the vendor credentialing system and register themselves as a vendor representative and 'opt in' to the Scripps organization.

**When Visiting a Scripps Facility**

- At all times vendor representatives must check in and out using the vendor credentialing system **and** obtain an identification badge prior to conducting any business at Scripps. Vendor representatives who have already been approved for and provided a Scripps contractor badge are exempt from this provision.
- The kiosks are listed below, if for some reason the kiosk is not available, report to the facility security department/ officer:
  - ✓ Scripps Memorial La Jolla — Hospital Lobby and Receiving Department
  - ✓ Scripps Memorial Encinitas — Receiving Department
  - ✓ Scripps Green Hospital – Main Lobby and Anderson Outpatient Pavilion (AOP) Lobby
  - ✓ Scripps San Diego, Mercy – Main Lobby
  - ✓ Scripps San Diego, Chula Vista – Main Lobby
- Vendor representatives will be required by the system to register their name, company, destination, departmental contact, length of visit, and purpose for visiting prior to printing an identification badge.
- Identification badges must be worn in a manner that always makes it easily visible in any area within a Scripps facility.
- Any vendor without proper identification will be asked to leave the premises.