



Community Memorial Health System

Where Excellence Begins with Caring

VENDOR MANAGEMENT PROGRAM HANDBOOK

Community Memorial Hospital
Ojai Valley Community Hospital

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ABOUT Community Memorial Health System

What originated in 1902 as a single hospital serving its neighbors has today grown into an expansive healthcare system that touches the lives of individuals throughout Ventura County, California and beyond.

Community Memorial Health System, established in 2005 when Community Memorial Hospital in Ventura merged with Ojai Valley Community Hospital, is comprised of these two hospitals along with family-practice health centers serving various communities within Ventura County.

Our health system is a community-owned, not-for-profit organization. As such, we are not backed by a corporate or government entity, nor do we answer to shareholders. Rather, we depend on - and answer to - the communities we serve.

Guiding us on this esteemed mission is a volunteer and diverse Board of Trustees that represents a cross section of leaders in our community, and who govern Community Memorial Health System with a focus aimed on what is best for our citizenry.

Our Mission, Vision and Values

- **Mission-** To Heal, Comfort and Promote Health for the Communities We Serve.
- **Values-** Integrity, Service, Excellence, Caring and Transparency.
- **Vision-** To be the regional integrated health system of choice for patients, physicians and employees. To be an indispensable community treasure.

We are committed to the care and improvement of human life. In recognition of this commitment, we will strive to deliver high quality, cost-effective healthcare in the communities that we serve. In pursuit of our mission, we believe the following value statements are essential:

*We recognize and affirm the unique and intrinsic worth of each individual.
We treat all those we serve with compassion and kindness, utilizing all of the skills and resources available to us.
We act with absolute honesty, integrity and fairness in the way we conduct our business and the way we live our lives.*

We trust our employees as valuable members of our healthcare team and pledge to treat one another with loyalty, respect, and dignity.

Vendor Management Handbook

Purpose: To establish expectations and guidelines for Vendors with respect to access and conduct on Community Memorial Hospital and Ojai Valley Community Hospital ("Hospital") premises.

To ensure patient safety and privacy, protect patient rights, and promote adherence to the Hospital's mission, ethical standards, policies and applicable laws.

DEFINITION OF A VENDOR:

A Vendor is defined as a person or representative of a company (including independent contractors and sub-contractors for a company) that has either a contractual agreement with the Hospital or is seeking to provide support, services, and/or maintenance for a company's product(s) or services at Hospital.

Additionally, Hospital may require other persons such as students, surgical assistants, observers, etc. to follow the vendor management program guidelines listed below.

- All Vendors and their representatives currently serving CMH and OVCH are to complete an online registration and credentialing process, managed by Vendormate, Inc., in order to continue their business relationship.
- An annual, per company fee, ranging from \$25 to \$250, is to be submitted with the vendor's first registration. This flat fee, based on the scope of a vendor's business relationship with Hospital, is paid directly to Vendormate® to cover expenses such as background checks, communication, and database maintenance.
- Vendors will be required to check-in upon arrival and obtain a vendor badge at by checking in to the Vendor kiosks and obtaining their badge at the PBX desk located in the main lobby of the Hospital. Vendors must complete a check-out process upon the completion of each visit.

Vendors may obtain additional information about the Hospital's Vendor Management Program by accessing www.cmhshealth.org/vendor. For Vendormate® Online Registration or Technical Support: <https://cmhshealth.vendormate.com>.

I. PHASE I: Vendor Registration Process Overview

To access the registration website directly, visit the following website:
<https://cmhshealth.vendormate.com>

The registration process consists of two phases:

1. Registration of the vendor as a company.
2. Registration of each Vendors' representatives, other staff members, and/or subcontractors who visit Hospital for business purposes.

The company and each representative will be required to provide contact information and upload documentation as specifically required to become a registered "Vendor Company" or registered "Vendor Representative."

Note: The registration process requires entry of the Vendor Company's Federal Tax Identification Number.

A. **Vendor Company Registration Process**

The Vendor Company registration process includes the following steps:

1. Business Identification:
 - Legal business
 - Type of business
 - Federal Tax Identification Number (FEIN)
2. Basic Business Information:
 - Business address and telephone
 - Estimated amount of business/sales conducted with Hospital in past 12 months
 - Representative's Information
3. Acknowledgment of Hospital policies documented in Vendormate®.
4. Payment:

Payment of annual "per company" registration fee to Vendormate®, using a credit card. Note: This fee is paid **only** during the first registration a vendor completes. Each vendor rep registering thereafter will not be required to pay a fee.
5. Confirmation:

Vendors will receive an email and a web link to click to confirm email address and login information.

Registration Fee Structure – [*See following page*]

Profile Criteria	Profile Credentialing	Fee
<p><u>High Profile Vendors</u> If they answer YES to any of these questions:</p> <ul style="list-style-type: none"> • Do you or anyone from your company interact with procedural patient care areas including but not limited to the Operating Room, Cardiac Cath Lab, Endoscopy, and Radiology? • Do you or anyone from your company have direct patient contact? • Are you a pharmaceutical vendor? • Are you an information technology vendor providing a software system or IT services (if you are simply supplying hardware, you would answer "No" to this question)? • Are you an educational institution that is sending students to our facility? • OR • Your company's annual spend greater than \$100,000 	<p>Annual business verification</p> <ul style="list-style-type: none"> • Annual financial health • Annual legal review • Weekly financial legal monitoring • Monthly (historical) sanction check (Entity & Individual) • Verified documents storage 	<p>\$315 per year per company</p>

<p><u>Medium Profile Vendors</u> If they answer NO to all these questions:</p> <ul style="list-style-type: none"> • Do you or anyone from your company interact with procedural patient care areas including but not limited to the Operating Room, Cardiac Cath Lab, Endoscopy, and Radiology? • Do you or anyone from your company have direct patient contact? • Are you a pharmaceutical vendor? • Are you an educational institution that is sending students to our facility? <p>AND either YES to this question:</p> <ul style="list-style-type: none"> • Do you or anyone from your company visit or intend to visit the hospital? <p>OR</p> <ul style="list-style-type: none"> • Your company’s annual spend between \$25,000 and \$100,000 	<p>Annual business verification</p> <ul style="list-style-type: none"> • Monthly (historical) sanction check (Entity & Individual) • Unverified documents storage 	<p>\$125 per year per company</p>
<p><u>Low Profile Vendors</u> If they answer NO to all these questions:</p> <ul style="list-style-type: none"> • Do you or anyone from your company interact with procedural patient care areas including but not limited to the Operating Room, Catherization Lab, Endoscopy, and Radiology? • Do you or anyone from your company have direct patient contact? • Are you a pharmaceutical vendor? • Do you or anyone from your company visit or intend to visit the hospital? <p>AND</p> <ul style="list-style-type: none"> • Your company’s annual spend less than \$25,000 	<p>Annual business verification</p> <ul style="list-style-type: none"> • Monthly (historical) sanction check (Entity & Individual) 	<p>\$25 per year per company</p>

Note: A Vendor is placed in a Vendor group on the basis of the scope of their business

relationship with Hospital.

II. PHASE II: Vendor Representative Registration, Credentialing, and Badging

Based on the scope of products and services marketed to Hospital, a Vendor will be classified into one of the three aforementioned categories, High, Medium, Low. The Vendor Representative’s (Rep) will be required to also register in Vendormate, and depending on the Vendor Rep’s registration, the Vendor Rep will be assigned to one of the following categories: Patient Care, Maternal Child Health, Onsite, or None.

Depending on the assigned category, the Vendor Rep will be required to submit certain documentation in order to complete the registration and credentialing process. If the Vendor Rep fails to complete any portion of the required registration and credentialing process, he/she will not be allowed to conduct business at the Hospital.

Documentation Checklist for Vendor Representatives

The following table represents a summary of documentation and competencies that are required to be on file through Vendormate® for assigned category of Vendor Representatives.

Badge Printout	Profile Criteria	Requirements
Patient Care	<p>If they answer YES to any of these questions:</p> <ul style="list-style-type: none"> • Do you interact with procedural patient care areas including but not limited to the Operating Room, Cardiac Cath Lab, Endoscopy, and Radiology? • Do you have direct patient contact? <p><u>THEN:</u></p> <ul style="list-style-type: none"> • Does your position require a state license? • Does your position require a certification? (BLS, ACLS, PALS, NRP) 	<ul style="list-style-type: none"> • Hepatitis B • Tuberculosis (TB) Test • Varicella (Chickenpox) • MMR (Measles Mumps and Rubella) • Seasonal Flu Shot • Drug Screen (10 Panel) • Criminal Background Check Attestation • Review of Policies • Badge Photo • State of California License • Certifications • Job Description/Responsibilities

<p style="text-align: center;">Maternal Child Health</p>	<p>If they answer YES to these questions:</p> <ul style="list-style-type: none"> • Do you have direct patient contact? • Do you enter the Maternal Child Health (MCH) unit which includes Labor & Delivery, Mother Baby Unit, Neonatal Intensive Care Unit (NICU) and Pediatrics? <p><u>THEN:</u></p> <ul style="list-style-type: none"> • Does your position require a state license? • Does your position require a certification? (BLS, ACLS, PALS, NRP) 	<ul style="list-style-type: none"> • Hepatitis B • Tuberculosis (TB) Test • Varicella (Chickenpox) • MMR (Measles Mumps and Rubella) • T(dap) • Seasonal Flu Shot • Drug Screen (10 Panel) • Criminal Background Check Attestation • Review of Policies • Badge Photo • State of California License • Certifications • Job Description/Responsibilities
<p style="text-align: center;">On-site</p>	<p>If they answer NO to all these questions:</p> <ul style="list-style-type: none"> • Do you interact with procedural patient care areas including but not limited to the Operating Room, Catherization Lab, Endoscopy, and Radiology? • Do you have direct patient contact? <p>AND</p> <p>If they answer YES to any of these questions:</p> <ul style="list-style-type: none"> • Do you visit or intend to visit the hospital? 	<ul style="list-style-type: none"> • Tuberculosis (TB) Test • Seasonal Flu • Review of Policies • Badge Photo • Job Description/Responsibilities
<p style="text-align: center;">None</p>	<p>If they answer NO to all these questions:</p> <ul style="list-style-type: none"> • Do you interact with procedural patient care areas including but not limited to the Operating Room, Catherization Lab, Endoscopy, and Radiology? • Do you have direct patient contact? • Do you visit or intend to visit the hospital? 	

Regardless of classification, all Vendor Reps must acknowledge and abide by the Hospital's Corporate Compliance Code of Conduct in order to conduct business with the Hospital.

III. General Facility Access and Standards

Vendor Reps may enter the Hospital for the purpose of conducting business only when the following conditions are met:

A. Tobacco-Free Campus

Hospital is a **tobacco-free** campus. No tobacco product use of any kind will be permitted inside or outside of any Hospital property.

B. Vendor Rep Badge Sign-in and Sign-out Process

The Hospital's Main Entrance is open 24 hours and serves as the primary entrance for Vendor Reps and other visitors. The Vendor Rep is to complete the check-in and vendor badge process in the Main Lobby. At the end of each visit, the Vendor Rep is to check-out at the vendor kiosk in the Main Lobby. Vendor badges are temporary and valid for only one day. Vendor badges will provide the necessary identification needed, including access level.

C. Accompanying Guests

The Vendor Rep agrees to escort any guests accompanying the Vendor Rep who are not registered with the Vendor Program. The guest(s) shall obtain a temporary visitor badge from the front desk in the Main Lobby. Guests may be able to obtain a temporary visitor badge no more than two visits, at which point the Hospital will require guest to register in Vendormate.

D. Access to Patient Care Areas

Vendor Reps are NOT allowed to enter high-level patient care areas of the Hospital (ICU, CCU, Operating Room, etc.) without specific permission from a Director or Manager of that department. Vendor Rep should report to the designated Hospital representative of that department and must follow any internal policies of the respective department.

E. Temporary Electronic Door Access

In the event Vendor Rep's scheduled appointment requires Vendor Rep to access areas of the Hospital requiring electronic badge access, Vendor Rep must contact the Hospital representative with whom they are visiting in the facility.

F. Access to Common Areas of Hospital

Excluding appointments, a Vendor Rep may spend **up to one hour** in the Hospital's cafeteria, snack bar, lobby, and corridors. However, the Vendor Rep is **prohibited** from soliciting any Hospital employees and physicians. Vendors must follow Hospital's No Solicitation Policy at all times.

G. **Parking**

When visiting Community Memorial Hospital located in Ventura, California, Vendor Reps may park in the parking structure located off of Brent St.

When visiting Ojai Valley Community Hospital, located in Ojai, California, Vendor Reps should park in the main hospital parking lot.

H. Use of Cell Phones and Hospital Equipment – Cellular phone usage is prohibited in patient and procedural care areas.

IV. Materials Management / Purchasing

The Materials Management Department is located in the basement of Community Memorial Hospital and the Purchasing Department is located at 2900 Loma Vista Road, Suite 202. Both departments are open from 7:00 AM to 5:00 PM, Monday through Friday, and can be reached at 805.667.5072 to schedule appointments.

- A. **Use of Purchase Order** - All purchasing-related transactions require an approved purchase order (including those for which there is not an exchange of funds) – in order for the Accounts Payable Department to process payment.
- B. **Group Purchasing Membership** – CMH and OVCH may share confidential information related to CMH/OVCH vendor relationships with its Group Purchasing Organization, currently Vizient. Additional information is available by contacting the Purchasing Department.
- C. **Standard Payment Terms** - Standard payment terms are Net 30 and shipments are FOB Destination.
- D. **Patient Care Products or Substitutes** - It is the policy of CMH/OVCH that all new patient care products or substitute products will be evaluated for cost and quality by a Clinical Quality Value Analysis (CQVA) Committee. This Committee will conduct a patient safety and product efficacy evaluation to ensure that there is a standardized review process before patient care products are recommended and purchased.
- E. **New Product Introductions** - Vendor Reps are responsible for scheduling an appointment with Materials Management to introduce new products before these products can be discussed with physicians or CMH/OVCH Medical Staff. The product must be left with Materials Management for review and evaluation by Value Analysis Committee. CMH/OVCH assumes no responsibility for supplies or equipment left by vendors in the organization for the purpose of evaluation. It is the responsibility of the vendor, to deliver, install, and remove the equipment

or supplies upon completion of the evaluation.

- F. **Removal of Product** - The Vendor Rep may not remove any supply, product, and equipment without verbal or written authorization by Materials Management.
- G. **Product Recalls** – Vendors / Vendor Reps are required to notify the Materials Management Department regarding product recalls. Such notification is to include identification of the product (including affected lot numbers and quantities), the reason for the recall, and a copy of the recall or FDA information.

V. Vendor Representatives in Procedural Care Areas

A. General Standards

The hospital recognizes the need for education and introduction of new technology, procedures, and techniques to health care professionals in the peri-operative setting. At the same time, a patient's right to privacy and safety must be protected – particularly when a Vendor Representative is present during a surgical procedure. All Vendor Representatives present in procedural areas must abide by the following general standards:

1. A Vendor Rep may observe a procedure **only** at the approval of the Department Director or designee, the physician, or the anesthesiologist.
 2. If a new medical product is being used, the product **must** be approved by the Hospital's Materials Management Department **before** the product can be introduced to the physician and/or other clinical staff and before the product can be used with a patient.
- B. A Vendor Representative that is present in the **Operating Room (OR), Cardiac Cath Lab (CCL), or other procedural patient care areas** during a procedure are REQUIRED to maintain documentation of certain competencies, health status, and background checks on file with Vendormate®.
- C. Vendor Reps are **not** permitted to:
1. Scrub in;
 2. Assist with procedures (other than technical assistance in the form of verbal consultation);
 3. Open sterile products (with the exception of the CCL); or
 4. Have patient contact
- D. Vendor Reps or Technical Support Reps with specialized training may

perform remote calibration of their company's products – e.g., pacemakers and pain management devices – to the physician's specifications.

- E. A Vendor Rep's presence during a procedure is to be documented in the patient's medical record.
- F. Sales calls with physicians are to be conducted in non-patient care areas only.

VI. Operating Room (OR) Standards

Purpose: To protect the rights and confidentiality of our surgical patients and to eliminate unauthorized solicitation by Vendor Reps accessing the Operating Room.

For the purpose of this document, Vendor Reps are included in the group referred to as "non-medical advisors."

1. Non-medical advisors may be present in the OR **only** with the advance approval/request of the Department Director or designee, the physician, and the anesthesiologist. **No walk-ins will be accepted.**
2. Non-medical advisors must **first** check-in with the Materials Management Department or at the self-service kiosk prior to arriving in the Operating Room area.
3. When entering the OR non-medical vendor advisors will:
 - a. Have their Vendormate®-issued badge displayed prominently at all times.
 - b. Be suitably attired, according to CMHS' Operating Room policies.
 - c. Leave personal belongings in a designated secure area.
 - d. Adhere to the CMHS standards of confidentiality and Infection Control.
 - e. Not be allowed to participate in the actual procedure or make any adjustments to equipment used during the cases.
 - f. Not be allowed to open sterile supplies and implants.
 - g. Enter the OR through the scrub area.
 - h. Enter the OR only after induction of anesthesia or unless invited by the Surgeon prior to induction of anesthesia.
 - i. Function under the direction of the Circulating Nurse and the Director of Surgical Services. Noncompliance to directions from either of the nurses could result in removal from the OR.

VII. Position Statements from The Association of periOperative Registered Nurses (AORN) and Society of Cardiac Angiography and Intervention (SCAI)

AORN Position Statement - The Role of the Health Care Industry Representative in the Perioperative/Invasive Procedure Setting:

AORN recognizes the need for a structured process for education, training, and introduction of procedures, techniques, technology, and equipment to health care professionals practicing within the peri-operative/invasive procedure setting. By virtue of their training, knowledge, and expertise, health care industry representatives can provide technical support to the surgical team to expedite the procedure and facilitate desired patient outcomes. Health care industry representatives may function in any of several positions (e.g., clinical consultants, sales representatives, technicians, or repair/maintenance personnel). The primary responsibility of the peri-operative registered nurse is to ensure the safety of patients undergoing operative or other invasive procedures. Core nursing activities that, by licensure, may not be performed by non-nurses are assessment, diagnosis, outcome identification, planning, and evaluation.

The surgical setting is one of the most potentially hazardous of all clinical environments and is subject to strict regulations, clinical practice guidelines and standards of care to preserve patient safety. It is important that the health care industry representative understands how to safely work in the operating room to assist the peri-operative team in maintaining the patient's safety, right to privacy, and confidentiality when a health care industry representative is present during a surgical procedure.

SCAI Position Statement:

General principles regarding industry representatives or clinical specialists in the Cardiac Cath Lab (CCL) include the following:

1. Their role in individual CCLs should be consistent policies set by the hospital and/or director.
2. They should not have "hands-on" equipment in the CCL, except for defined educational purposes or device preparation.
3. They should always provide information and advice that is in the best interests of the patient, regardless of other considerations.
4. Their presence in the CCL is reasonable when it is helpful to the physician in providing patient care. Hospital policies should not prohibit these interactions.
5. Their presence in the CCL without specific purpose, (e.g., to "observe") is of uncertain appropriateness and may reasonably be prohibited.

VIII. Pharmaceutical Manufacturer Sales Representatives

Vendor Representatives detailing pharmaceuticals, intravenous solutions, tubing or any item marked "Federal law prohibits dispensing without a prescription" shall deal directly with the CMHS Pharmacy Department.

- A. Pharmaceutical Vendor Reps shall schedule appointments by contacting the Pharmacy Department at 805-652-5068.
- B. Pharmaceutical Vendor Reps **MAY NOT** enter patient care areas, e.g.: Emergency room, Operating Room, Nursing Stations, and Anesthesia without authorization from the Pharmacy Department.

- C. No samples, legend or over-the-counter product may be left in this facility. Any educational or promotional programs for prescribing medications must be registered in the Pharmacy Department prior to discussing with CMHS Staff.
- D. Only Formulary approved medications may be "Detailed" on CMHS Medical property (this includes clinics). The Formulary status of a medication may be determined by contacting the Pharmacy Department.
- E. Displays are not permitted in public areas. Funding for educational programs is encouraged. Speaker programs must be arranged through the Pharmacy or Medical Education Departments.
- F. CHMS has a "closed" formulary system. Non-Formulary medications are not available for use on patients in this facility. Requests for addition of items to the Formulary must be initiated by a physician with privileges at this institution and reviewed by the Pharmacy and Therapeutics Committee. The requesting physician must contact the Pharmacy directly and provide appropriate documentation for P&T Committee consideration.
- G. Violation of these policies by the Pharmaceutical Vendor Rep will result in suspension of visiting privileges.
- H. Samples are not permitted.

IX. Hard Badge Issuance Criteria

Other than employees, physicians, auxiliary, and board members, the Human Resources Department may issue hard badges to certain vendors that meet the following criteria:

- Contracted management services performing on-site services \geq 90 consecutive days
- Students and interns completing approved internships or rotations
- Independent contractors and consultants performing on-site services \geq 90 consecutive days
- Employment agency assignments \geq 90 consecutive days
- Clinical staffing assignments \geq 90 consecutive days

All other exceptions require appropriate administrative approval prior to hard badge issuance.

X. Disciplinary Action

Vendors and/or their Representatives who do not adhere to the guidelines set forth in this document will be subject to remedial actions ranging from suspension to permanent dismissal of rights to conduct business with Hospital on behalf of their companies. Because the Hospital does not want to hinder the delivery of patient care, the Vendor Representative's company may assign another Vendor Rep to service Hospital during the suspension or permanent dismissal of the Vendor Rep violating Hospital's policies.