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**EFFECTIVE DATE:** *October 6, 2017***PROCEDURE TITLE:***Supplier Visitation*

*To be reviewed every three years by:  
Executive Vice President, Administrative Services*

**REVIEW BY:** *November 1, 2020*

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**PROCEDURE**

The purpose of the Supplier Visitation Guideline:

- Control & facilitate supplier traffic to assure security and limit access to only those areas desired.
- Protect the valuable time of the user departments and Supply Chain by eliminating unscheduled visits from supplier representatives.

It is the policy of Trinity Health to require satisfactory identification of guests when they visit a Trinity Health facility, including affiliated sites, and Trinity Health-owned physician practice offices, during and outside normal business hours. It is a requirement that all representatives successfully register and satisfy outstanding requirements through our vendor management system. All supplier representatives must have appointments for visiting any department. All supplier representatives must be either escorted by a Trinity Health manager, official, or designee, have appropriate authorization from the Ministry through a certification program, or have governmentally vested authority to inspect or tour without an escort. In all cases, outside parties must wear a properly issued guest badge from an authorized department as identified by the Ministry (i.e. security, supply chain, human resources).

1. Patient Care Areas: Areas where patients are assessed, treated, and/or monitored by employees. This includes inpatient nursing units, the Emergency Department, Endoscopy, Interventional Cardiology areas, Radiology, Respiratory/Pulmonary areas, all surgical areas and all other areas that meet the definition.
2. Employees: Persons who work for Trinity Health in return for financial or other compensation and include resident physicians, pharmacists, and nurses.

## GENERAL

1. All supplier representatives are required to schedule an appointment during the normal business hours of the facility in question in advance with their Trinity Health contact before visiting a Trinity Health facility. Exceptions to the schedule must be approved by Supply Chain or the affected department manager. Unannounced visits and/or solicitation are unacceptable.
2. At the time of the appointment, the supplier representative shall report to the front security/receptionist desk or Supply Chain for check in, according to Ministry procedure, and must sign in, stating the purpose of the visit, which the appointment is with, and the time and date of the appointment.
  - A. For visitations at facilities without a security desk or Supply Chain on site, supplier representatives must report to the specific department in which they have a scheduled appointment. The department is responsible for keeping a log of visitors and must escort visitors throughout the facility.
3. Under no conditions shall a supplier representative use this time to visit or solicit products or services to any areas other than the scheduled areas.
4. All supplier representatives are expected to follow Trinity Health's Supplier Code of Conduct.
5. Supplier representatives are not allowed to alter, remove, destroy, view, print, access, photocopy, discuss or disclose in any manner confidential applicant, patient, employee, and/or Trinity Health information. Supplier representatives must respect the confidentiality of patient information at all time.
6. Contracted service representatives will be issued a badge(s) by the authorized department for the duration of the contract with confirmation from the department administering the agreement (i.e. elevator maintenance, construction contractors, pest control, window washers, etc).
7. All supplier representatives are required to be escorted through the facility to their meeting or work destination by the individual whom they came to see or their representative.
8. No orders are to be given to any supplier representative by any hospital personnel other than those authorized to do so.
9. Supply Chain shall be the sole authorized agent for Trinity Health for the solicitation of product pricing from sales.
10. Supplier representatives in areas of a facility where direct care is being provided to patients is prohibited unless accompanied by hospital personnel and approved by hospital officials if the following conditions are met:
  - A. Supplier representatives cannot offer medical opinions or service.

- B. Supplier representatives cannot have a role in the diagnosis and/or treatment of patients.
  - C. The patient must be informed and give consent for supplier representatives to be in their area of care.
  - D. Hospital officials must approve all admissions into the operating room. Therefore, it is to the discretion of the hospital officials to determine and confirm if supplier representatives are qualified to be in the operating room.
  - E. Supplier representatives cannot touch or operate equipment used for current patient care unless covered under the terms and conditions of the contact and approved by hospital officials.
  - F. Supplier representatives cannot participate in any manner of a surgical procedure and can only take an observatory role unless covered under the terms and conditions of the contract and approved by hospital officials.
  - G. Infection control policies and procedures must be enforced at all times. Supplier representatives who enter direct patient care areas must provide the hospital proof of communicable disease screening.
11. Supplier representatives shall have limited access to the surgeons' lounge, for the purpose of conducting educational seminars.
  12. Supplier representatives may not page resident physicians or hospital personnel. Hospital personnel may be contacted through Supply Chain and not a facility operator.
  13. Use of any phones by supplier representatives other than the public telephones located in the main entrance of the hospital is prohibited.
  14. Prior to leaving a Trinity Health facility, an outside party must check with his or her Trinity Health contact to be escorted out of the facility. Outside parties must return the visitors pass and sign out of the logbook before leaving the facility.

#### **CONTACTING PRIVATE PHYSICIANS**

1. All sales appointments by supplier representatives to see a private physician are to be made through that physician's office and take place at the physician's office.
2. If the physician agrees to see the supplier representative at a Trinity Health site, the physician's office must notify Supply Chain that the appointment has been made. The supplier representative must then follow the procedure outlined above.

## **SAMPLES**

1. Samples must be left with Supply Chain for follow-up with the departments and physicians.
2. It is unlawful to charge patients for samples that Trinity Health received free of charge.
3. Prescription drug samples shall be limited to physicians for office use. Drug samples shall not be administered to any patients in the hospital and must be run through the pharmacy councils to determine if they are in the formulary.
4. Sample medications intended for hospital owned clinics or physician offices must be requested by an attending physician on staff per legal regulations.

## **OTHER**

1. Law enforcement officials, court representatives, and attorneys must be referred to the authorized department identified at the Ministry before entering the facility.
2. Suppliers and other outside parties wishing a general tour of a facility or department must be referred to the department assigned to arranging facility tours.
3. Any supplier representative not adhering to the above policy will be escorted out of the facility by the security department and may result in cancellation of any existing business with Trinity Health as well as a loss of privileges at all Trinity Health facilities.

## **SCOPE/APPLICABILITY**

This Procedure is intended to apply to everyone within the SCFAM organization as well as throughout Trinity Health. All who deal with suppliers, and their representatives, will be held accountable to these standards of conduct.

## **DEFINITIONS**

**Executive Leadership Team ("ELT")** means the group that is composed of the highest level of management at Trinity Health.

**Ministry** means a first tier (direct) subsidiary, affiliate, or operating division of Trinity Health that maintains a governing body that has day-to-day management oversight of a designated portion of Trinity Health System operations. A ministry may be based on a geographic market or dedication to a service line or business. Ministries include Mission Health Ministries, National Health Ministries, and Regional Health Ministries.

**Policy** means a statement of high-level direction on matters of strategic importance to Trinity Health or a statement that further interprets Trinity Health's governing documents. System Policies may be either stand alone or Mirror Policies designated by the approving body.

**Procedure** means a document designed to implement a policy or a description of specific required actions or processes.

**Standards or Guidelines** mean additional instructions and guidance which assist in implementing Procedures, including those developed by accreditation or professional organizations.

**Subsidiary** means a legal entity in which a Trinity Health Ministry is the sole corporate member or sole shareholder.

## **RESPONSIBLE DEPARTMENT**

Further guidance concerning this Procedure may be obtained from Strategic Sourcing.

## **RELATED PROCEDURES AND OTHER MATERIALS**

- Supply Chain Policy No. 3 - Supplier

## **APPROVALS**

**Initial Approval:** October 6, 2017

**Subsequent Review/Revision(s):**