Cleveland Clinic
Vendor Representative Handbook

Cleveland Clinic
Supply Chain Management
1950 Richmond Rd. TR301
Lyndhurst, OH 44124

Telephone: 216-448-8000
Fax: 216-448-8080
# Table of Contents

Vision and Mission Statements ............................................................................................................. 3
Supplier Information ............................................................................................................................... 3
  Supplier Code of Conduct .................................................................................................................... 4
Visits within Cleveland Clinic .............................................................................................................. 5
Vendor Credentialing Process .............................................................................................................. 5
Compliance Requirements .................................................................................................................... 6
Access to the OR ..................................................................................................................................... 7
Non-Compliance ..................................................................................................................................... 7
Supplier Diversity ................................................................................................................................. 8
Contacting the Supply Chain Management Department .................................................................... 9
Service Calls ......................................................................................................................................... 9
Product Recalls ..................................................................................................................................... 10
Return Goods ........................................................................................................................................ 10
Appendix A – Vendor Visitation and Interaction Policy ..................................................................... 11
Appendix B – Frequently Asked Questions – Vendormate Process .................................................. 12
Dear Supplier:

Welcome and congratulations on being selected as a Cleveland Clinic vendor. We are a not-for-profit, multi-specialty, academic medical system that integrates clinical and hospital care with research and education.

Cleveland Clinic hospitals are engaged in an evolving process to refine our supplier base by establishing relationships with suppliers that share our values and dedication to excellence. This handbook has been developed to provide your organization with important information in order to effectively conduct business with Cleveland Clinic. As a supplier, your company and its representatives are subject to the policies and procedures contained in this Handbook.

Cleveland Clinic is at the leading edge of science, medicine and surgery expanding and growing with new technology. We look forward to your contributions to our continued success. After reviewing the handbook, please contact Cleveland Clinic Supply Chain Management Department at 216-448-8000 if you have any questions or concerns.

Vision and Mission Statements

Vision: Striving to be the global leader in healthcare supply chain through collaboration and innovation.

Mission: Empowering caregivers to deliver world class healthcare, research and innovation focused on “Patients First” by providing optimal resources at the best value.

Supplier Information

This handbook has been created to provide your company with important information you will need to effectively conduct business with Cleveland Clinic. If you are a new Cleveland Clinic supplier, you should have already completed the Vendor Demographic Process.

If you have not completed this process please contact Cleveland Clinic Supply Chain Management office at:

Cleveland Clinic
Supply Chain Management
1950 Richmond Rd. TR301
Lyndhurst, OH 44124
Telephone: 216-448-8000
Fax: 216-448-8080

As a registered supplier you can begin doing business with Cleveland Clinic in accordance with the policies and procedures contained in this handbook, including but

April 2015
not limited to the Vendor Visitation and Interaction policy (Appendix A) These policies are subject to change periodically and will be communicated to you in a timely manner.

**Supplier Code of Conduct**

All Cleveland Clinic suppliers are expected to comply with the following when conducting business with Cleveland Clinic:

- Direct all business correspondence regarding the sale of materials or services including informing Supply Chain Management of financial, economic, supply changes, recalls or other material conditions that affect or might affect Cleveland Clinic patient safety, ongoing operations, or operating decisions to Cleveland Clinic through Supply Chain Management (unless instructed by Supply Chain Management to do otherwise) at:

  Cleveland Clinic  
  Supply Chain Management  
  1950 Richmond Rd. TR301  
  Lyndhurst, OH 44124  
  Telephone: 216-448-8000  
  Fax: 216-448-8080

- Conduct all negotiations with Supply Chain Management and negotiate in an ethical manner.

- Only the Supply Chain Management Department at Cleveland Clinic can award official agreements for goods and services. Agreements that are not signed by Supply Chain Management and may adversely impact your ability in receiving payment for goods and/or services rendered.

- Do not offer Cleveland Clinic staff money, loans, credits or prejudicial discounts, gifts, entertainment, favors, products or services for their personal use or benefit. Cleveland Clinic policy prohibits any employee from receiving gifts and/or gratuities from any supplier. Please express your gratitude in terms of quality, service and price.

- Food and beverages may not be provided by any supplier, vendor, or Vendor Representative to any employee (including physicians, nurses, pharmacists). Vendor Representatives may not make food arrangements, orders or deliveries, or directly pay for delivered food, or provide payment in any form.

- Make available, through Supply Chain Management, technical information, engineering support, systems, policies, procedures, processes, products, warranties and services that may improve Cleveland Clinic’s use of the supplier's products and services.
Advise Supply Chain Management of new products, pricing and services as such information becomes available.

Treat all transactions and dealings with Cleveland Clinic as confidential and proprietary and do not communicate Cleveland Clinic's relationships or business dealings to third parties without Cleveland Clinic’s written consent.

Adhere to Cleveland Clinic’s policies and procedures.

Do not use Cleveland Clinic's name or logos in publicity or advertising without Cleveland Clinic's prior written consent. Make application through our office.

Complete Center for Online Medical Education and Training (COMET) modules as assigned.

Current suppliers who are reporting spend information can login to the reporting system (https://app.suppliergateway.com/clevelandclinic/Login.aspx). If you need assistance with login information or a specific spend reporting inquiry, please contact our portal support team at sgsupport@suppliergateway.com or 216.432.6922.

**Visits within Cleveland Clinic**

**Vendor Credentialing Process**

A Vendor Representative is defined as any representative such as, sales person, manager, liaison, account executive, contact, administrator, company technician, clinical support, nurse clinician, home healthcare personnel, manager, medical/scientific liaison of a manufacturer or company who visits CC in any capacity, including but not limited to, soliciting, marketing or distributing information regarding the use of vendor products or services.
Vendor Representatives must adhere to the following guidelines in order to obtain a Cleveland Clinic ID badge. The ID Badge is for identification purposes, safety and security.

<table>
<thead>
<tr>
<th>System</th>
<th>Contracted Personnel</th>
<th>Onsite Sales Representative</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Silkroad/Red Carpet</td>
<td>Vendormate</td>
</tr>
<tr>
<td>Required Documentation</td>
<td>• Profile via Silkroad</td>
<td>• TB test as required by location</td>
</tr>
<tr>
<td></td>
<td>• Conditions of Use Form</td>
<td>• Comet Training education modules</td>
</tr>
<tr>
<td></td>
<td>• Review &amp; Acknowledge Cleveland Clinic Enterprise- wide policies</td>
<td>• Acknowledgement of Vendor Handbook and Vendor Visitation and Interaction Policy</td>
</tr>
<tr>
<td></td>
<td>• Enterprise-wide approved confidentiality agreement</td>
<td>• Background check attestation</td>
</tr>
<tr>
<td></td>
<td>• Background Release Form</td>
<td>• Sexual Offender Registry attestation</td>
</tr>
<tr>
<td></td>
<td>• TB Test</td>
<td>• Photo for ID Badge</td>
</tr>
<tr>
<td></td>
<td>• Register for parking</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Comet Training education modules</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Obtain ID badge</td>
<td></td>
</tr>
<tr>
<td>Contact/Support</td>
<td><a href="mailto:nonemployeeonboarding@ccf.org">nonemployeeonboarding@ccf.org</a></td>
<td><a href="mailto:vendorcommunications@ccf.org">vendorcommunications@ccf.org</a></td>
</tr>
</tbody>
</table>

Upon verification of the above documentation, Vendor Representatives will be eligible for an identification badge upon sign-in at a CC facility. Vendor Representatives without a valid ID badge will be denied access to any area, including the OR, under any circumstances.

**Compliance Requirements**
All Vendor Representatives are required to:

- Complete annual online compliance courses through Center for Online Medical Education Training (COMET). Upon completion of registration in Vendormate please be aware it can take 3-5 days for your COMET login credentials to be created and forwarded to you.

- All sales and service calls to Cleveland Clinic are to be scheduled in advance. Upon arrival, all Vendor Representatives must first sign-in and print a badge through the Vendormate system then proceed to the specified appointment area only. Upon completion of the appointment Vendor Representative must sign-out in the Vendormate system.

- All Vendor Representatives will display prominently, above the waist, photo facing front, an ID Badge when visiting, in any capacity to any Cleveland Clinic facility. The ID Badge, in conjunction with a scheduled appointment, is the official indication of an authorized visit.
• Other identification tags as furnished by some companies may be worn, but in no case are they to be used in lieu of an ID Badge issued by Cleveland Clinic. Failure to register with the Vendormate Vendor Management System and failure to display prominently the ID Badge are serious infractions of our Cleveland Clinic Vendor Visitation and Interaction Policy.

• Vendor Representative shall adhere to any specific criteria outlined by the particular entity he/she has a previously scheduled appointment. Some departments have procedures or policies that conform to the nature of the work done in their areas. Please become familiar with them.

• Nursing floors, lobbies, dining rooms, and fellow reading rooms are inappropriate places for vendor visits.

• Calls to the surgical centers may be made only in certain designated areas.

• Vendor Representative Vendormate information and documentation must be renewed annually and upon changing employers.

**Access to the OR**
The following apply to any Vendor Representatives entering an Operating Room (OR):

• Vendor Representative access to the OR’s will only be given following a physician or nurse manager’s request that a vendor be present in the OR on a specific date and time.

• Vendor Representatives must be placed on the OR surgery schedule by the service line nurse manager prior to the scheduled visit. The physician must notify the service line nurse manager of the requested vendor visit.

• Approved vendors will be placed on an Outlook calendar by the service line nurse manager.

• Vendor Representatives not on the OR Outlook surgery schedule must provide the name of the physician or nurse manager who scheduled the visit. An attempt will be made to reach out to the physician or nurse manager and a decision will be made if they are needed in the OR.

• If the vendor has not been requested the vendor must leave the OR area immediately.

• Daily colored stickers must be displayed.

**Non-Compliance**
Violations of these guidelines and/or the Vendor Visitation and Interaction Policy (Appendix A) may be handled through progressive discipline and could result in
complete loss of visiting rights to Cleveland Clinic. Any observed or reported violation of the policy may be handled in the following manner:

1. Vendor Representatives who fail to comply with CC policies will be subject to disciplinary action up to and including permanent loss of business privileges.

2. Continuous infractions or repeated violations to this policy by Vendor Representatives may result in suspension, a request to replace company representatives, and possible loss of business privileges at CC.

3. Violations committed by any one Vendor Representative of a given company may result in disciplinary action against any or all representatives of that company.

4. Disciplinary action may vary depending upon the nature of the infraction and the circumstances surrounding the offense. Supply Chain Management reserves the right to determine the severity of the infraction and will use its discretion when assessing and determining the proper course of disciplinary action. Consequences may vary depending on the severity of the infraction.

5. Supply Chain Management will notify vendor of the violation, the determined level of infraction, and the planned course of disciplinary action.

6. Duration of restriction of all activity and service calls may be 3 months, 6 months, one year, or permanent depending on extent of the infraction. Certain situations may require deviation from the guidelines outlined in the policy. Vendor Representatives can be banned from CC permanently regardless of Vendor Representative’s employer.

**Supplier Diversity**
Cleveland Clinic is committed to reaching out to organizations that meet and support Supplier Diversity. Through Supplier Diversity strategy, Cleveland Clinic aims to provide equal access to potential business opportunities for, businesses owned by women, minorities, veterans, LGBT, and those located in HUBZones.

It is the practice of Cleveland Clinic to seek out and provide contracting opportunities to, and document the use of diverse 2nd Tier Suppliers (as defined below) by following the contractual standards set forth below. During the Term of the Agreement, Supplier/Contractor will:

- Set a target to spend a minimum of ten percent (10%) of the monies billed by 1st Tier Supplier pursuant to this Agreement (including the cost of subcontracting work to other vendors, suppliers and contractors) with diverse 2nd Tier suppliers for products and services which are directly related to the services under this Agreement.
When reporting direct diverse tier 2 spend, submit an action or sub-contracting plan, to Company’s satisfaction, detailing the scope(s) of work to be performed by diverse 2nd Tier Suppliers, including the ethnicity, gender, names and contact information of such Suppliers and provide monthly (or at a minimum, quarterly) reports to Company’s Office of Supplier Diversity at http://app.suppliergateway.com/clevelandclinic.

Demonstration of Compliance:
Company reserves the right to audit compliance with these requirements on reasonable advanced notice at the expense of Company.

Definitions
1st Tier Suppliers - suppliers and contractors directly engaged in a contractual arrangement with Cleveland Clinic to provide goods and/or services.

2nd Tier Suppliers - suppliers and subcontractors directly engaged in a contractual arrangement with the 1st Tier Suppliers (Prime Suppliers) as defined above, in order to realize a partnership between Cleveland Clinic and Prime Suppliers under which Prime Suppliers subcontract a portion of their contractual arrangements with Cleveland Clinic directly with diverse suppliers and contractors.

For Supplier Diversity inquiries, please call 216-448-8055 or send an email to supplierdiversity@ccf.org.

Contacting the Supply Chain Management Department
Any company wishing to furnish goods or services to Cleveland Clinic must contact Supply Chain Management Department. Your request will be given to an appropriate category team and an appointment will be made based on their discretion. Visits without a prearranged appointment are not permitted. All correspondence is to be directed to:

Cleveland Clinic
Supply Chain Management
1950 Richmond Rd. TR301
Lyndhurst, OH 44124
Telephone: 216-448-8000
Fax: 216-448-8080

Service Calls
Cleveland Clinic possesses many pieces of expensive and highly technical equipment. It is expected that this equipment be maintained properly. Service representatives are expected to respond promptly to requests for service and to coordinate their work with the departments and Supply Chain Management. Supply Chain Management can help you maintain the proper liaison.
Product Recalls
All product recall correspondence is to be directed to:

Cleveland Clinic
Supply Chain Management
Attn: Product Recalls
1950 Richmond Rd. TR301
Lyndhurst, OH 44124

Please include the date of purchase(s), purchase order number(s) and name of the person(s) that placed the order when sending product recall information.

Return Goods
We reserve the right to return, at the supplier’s expense, material which does not meet our specifications.
Appendix A – Vendor Visitation and Interaction Policy

Cleveland Clinic Employees can access here.

Vendor Representatives can access here.
Appendix B – Frequently Asked Questions – Vendormate Process

You must register in the Vendormate® credentialing system to access our facilities and be eligible for business with Cleveland Clinic. Every representative from your company who interacts with Cleveland Clinic is required to create a profile. We appreciate you giving our vendor registration program priority so that we can work together more effectively.

Through Cleveland Clinic Vendormate Program, you can provide electronically the information we need to continually, including but not limited to:

- Communicate our unique and most current business policies with you,
- Ensure we have the most accurate contact information for you and the latest information on your business and capabilities,
- Screen vendors and representatives against state and federal sanction lists, and
- Manage access to our facilities and patient care areas based on immunization, training, and compliance status.

Vendormate Registration

Who is required to register in Vendormate?
All on-site sales reps currently doing business with Cleveland Clinic are required to register in Vendormate, including but not limited to clinical and non-clinical representatives, Pharmacy representatives and consultants.

How do I register in Vendormate?
Register at https://dashboard.vendormate.com. Upon completion of registration and profile in Vendormate, please wait 3-5 business days to receive the next steps to complete Comet training. Until registration is completed in Vendormate, Comet credentials cannot be sent to the Vendor Representatives.

How do I upload documents into Vendormate?
You can upload documents using scanner and computer, Apple and Android mobile devices or fax. To use your scanner and computer, see the Uploading Documents tutorial, or contact Vendormate Support at https://www.vendormate.com/vendors/support for detailed information.

COMET

What document is needed to verify Comet?
After completing all of the training courses in Comet, please print off the "To Do" tab in Comet and upload or fax that document into Vendormate. No other tab will be accepted.

Comet training says it is for employees? As a representative do I still need to complete?
Yes. Comet is for both employees and vendors.

How do I log in to Comet?
Your login will be your assigned Employee ID number including any letters before the number (“T,” “C” or “SCM”).

April 2015
Who can I contact if I have technical problems?
You can reach Comet support at 216-445-4566. The hours for this number are 9:30 a.m. to 4:00 p.m. Monday through Friday. You can also e-mail COMET at comet@ccf.org.

TB Testing
Who needs a TB test?
All Vendor Representatives, including clinical, non-clinical and pharmacy representatives who come on site to any Cleveland Clinic facility are required to have an annual TB test.

What happens if I have a positive TB test result?
TB test with negative results, chest x-ray dated within one year with no signs of active TB, or latest chest x-ray with no signs of active TB accompanied by physician questionnaire/letter are the only acceptable documentation. Test documentation expires annually, as does physician questionnaires/letters if applicable. Refer to http://www.cdc.gov/ if you have questions.

Where can I get a TB test?
Contact Cleveland Clinic Occupational Health (216-444-6129) for guidance on the proper TB Testing process.