



**Cleveland Clinic**

# Vendor Representative Handbook

**Cleveland Clinic**

Supply Chain and Support Services

1950 Richmond Rd. TR301

Lyndhurst, OH 44124

Telephone: 216.448.8080

Fax: 216.448.8080

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 and Support Services Department at 216-448-8000 if you have any questions or concerns.

### **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.

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 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.

Cleveland Clinic's Supply Chain & Support Services' mission is to deliver a world class patient and customer experience through informed decisions and smarter work.

### **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 and Support Services 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 and Support Services (unless instructed by Supply Chain and Support Services to do otherwise) at:

Cleveland Clinic Supply  
Chain and Support Services  
1950 Richmond Road, TR301  
Lyndhurst, OH 44124  
Telephone: 216-448-8000  
Fax: 216-448-8080

Conduct all negotiations with Supply Chain and Support Services and negotiate in an ethical manner.

Only the Supply Chain and Support Services Department at Cleveland Clinic can award official agreements for goods and services. Agreements that are not signed by Supply Chain and Support Services 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 and Support Services, 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 and Support Services 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 'Non-Employee Visitation and Onboarding Policy'.

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 (MyLearning) modules as assigned.

**Supplier Onboarding:**

Please use the matrix below to determine if a supplier representative should be on boarded through the non-employee (i.e. SilkRoad) or Vendor (i.e. Vendormate) process. See below for potential exceptions.

	<b>Non-Employee</b>	<b>Vendor</b>
<b>System Utilized</b>	SilkRoad	Vendormate/GHX
<b>Role</b>	Contractors, construction workers, observers, couriers, visiting researchers, students, volunteers	Any individual who visits Cleveland Clinic for the purpose of soliciting, marketing or distributing information regarding the use of products or services.
<b>Location</b>	In clinical/non-clinical areas, patient facing, or a patient care facility (see definition above)	In non-clinical areas (meeting with Supply Chain, physician offices, repairing equipment, etc.) or clinical areas for product trials
<b>Compliance Requirements</b>	Tuberculosis test, flu shot (seasonally), online compliance courses (i.e MyLearning) (annually), and background check	
<b>Background Test Faciator</b>	Cleveland Clinic background check	GHX background check
<b>Badge Type</b>	Hard badge	Sticky badge
<b>Badge Expiration</b>	One year, unless otherwise approved	A new badge must be printed for each visit upon check in. Sign out mandatory.
<b>Initiate Process</b>	Cleveland Clinic personnel submits Onboarding Request Form or Event Coordinator initiates	Sales representative registers in credentialing software (i.e. Vendormate/GHX)
<b>Approval</b>	Cleveland Clinic personnel authorizes non-employee prior to start date	Scheduled appointment with Cleveland Clinic personnel required for every visit

Orientations are the responsibility of the department representative.

If you have any questions please reach out to onboarding support at [nonemployeeonboarding@ccf.org](mailto:nonemployeeonboarding@ccf.org) or by phone at 216.448.0082.

### **Potential Exceptions to the onboarding/badging process:**

- Supplier representatives on site for a 'vendor fair'
- Supplier representatives meeting with C-Suite
- Supplier representatives demoing a product not in a patient care area
- Supplier representatives participating in a Request for Information (RFI) or Request for Proposal (RFP)

### **Vendor Representative Badging**

All Vendor Representatives determined who will be on Cleveland Clinic property in a patient or clinical area, must obtain, display, and renew valid identification through Protective Services. The onboarding requirements will be completed prior to entering a patient area and include the following, or variations of the following:

1. Submit basic information such as name, email, Social Security Number (SSN), Date of Birth (DOB) to the vendor credentialing software (i.e. GHX/Vendormate)
2. Complete a background release form
3. Complete a confidentiality agreement
4. Acknowledge Conditions of Use
5. Submit verification of negative TB test if necessary
6. Read and acknowledge enterprise-wide policies
7. Complete online compliance courses (i.e. MyLearning)
8. Flu shot compliance
9. Department-specific requirements (signing in and out of area)

Requirements are subject to change at any time based on needs of stakeholders, departments, the Cleveland Clinic enterprise, or government regulations. All Cleveland Clinic employees who have oversight of representatives, contracted companies, will adhere to the onboarding process Cleveland Clinic requires as outlined within this policy.

### **Visitations:**

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 GHX/Vendormate system then proceed to the specified appointment area only. Upon completion of the

appointment Vendor Representative must sign-out in the GHX/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.

- If a Vendor Representative is on Cleveland Clinic property and does not have a badge they are required to sign a Non-Disclosure Agreement (NDA) and be accompanied by a Cleveland Clinic employee at all times.

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 GHX/Vendormate Vendor Management System and failure to display prominently the ID Badge are serious infractions of our Cleveland Clinic Vendor Visitation and Interaction Policy and may result in being escorted off Cleveland Clinic property.

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 GHX/Vendormate information and documentation must be renewed annually and upon changing employers.

Vendor Representatives are required to wear orange scrubs during all participation or observation of a clinical procedure at Cleveland Clinic's main campus.

- This scrub color is specific to vendor representatives and is designed to ensure easy identification.
- When leaving the surgical or procedure rooms, Vendor Representatives must cover their scrubs with a white, buttoned lab coat while inside the hospital
- This attire cannot be worn when traveling to and from work. Vendor Representatives must completely change out of their scrubs with or without a lab coat before leaving the premises.
- If Vendor Representatives do not comply with these guidelines may risk loss of privileges of the clinical areas and all other Cleveland Clinic facilities.
- For all other Cleveland Clinic facilities, the specific location will provide the Vendor Representative with their scrubs.

## **Pharmaceutical Representatives:**

For information surrounding pharmaceutical vendor representatives please refer to the below policies:

- [Pharmaceutical Sales Representative Policy](#)
- [Cleveland Clinic Medical Staff P&T Committee Functions Policy](#)
- [Requests for Formulary Changes Through the Cleveland Clinic United States Medical Staff P&T Committee Policy](#)

### **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. When in any clinical space under no circumstances will a Vendor Representative be permitted to:

- Participate in hands-on delivery of patient care (e.g. scrub)
- Provide initial training of equipment and/or supplies during a procedure

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.

## **General Requirements:**

Vendor Representatives may not use Cleveland Clinic phones, computers or other equipment for supplier's business or personal use unless devices are issued by department for intended business purpose.

Vendor Representatives may not distribute or post any type of brochure, advertisements, pens, cups or similar promotional or marketing materials in the OR and/or associated areas or to any personnel.

Vendor Representatives are not permitted to increase inventory levels in storerooms and/or

clinical areas.

Vendor Representatives are not permitted to bring into procedural area, Operating Room (OR), clinical area, or patient care areas any device that has the capability to record or transmit audio and/or video images, including photography.

### **Non-Compliance**

Violations of these guidelines and/or the Non-Employee Visitation and Onboarding 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:

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

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.

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

Disciplinary action may vary depending upon the nature of the infraction and the circumstances surrounding the offense. Supply Chain and Support Services 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.

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

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 Supplier 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 2<sup>nd</sup> 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 1<sup>st</sup> Tier Supplier pursuant to this Agreement (including the cost of subcontracting work to other vendors, suppliers and contractors) with diverse 2<sup>nd</sup> Tier suppliers for products and services which are directly related to the services under this Agreement.

**Demonstration of Compliance:**

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

**Definitions**

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

**2<sup>nd</sup> Tier Suppliers** - suppliers and subcontractors directly engaged in a contractual arrangement with the 1<sup>st</sup> 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 216.372.8443 or send an email to [supplierdiversity@ccf.org](mailto:supplierdiversity@ccf.org).

**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 and Support Services. Supply Chain and Support Services can help you maintain the proper liaison.

**Equipment/ Device/ Implant Set**

- All equipment/device/implant sets to be used by Vendor Representatives must be delivered at least 24 hours before a scheduled procedure to allow for inventory, sterilization, and/or biomedical safety evaluation in accordance with Cleveland Clinic's policies. Cleveland Clinic will not pay for equipment until the day of its use regardless of when it is brought in.
- All new products are subject to review by Supply Chain. A formal process has been established for documentation of product evaluations. Supply Chain Management will provide assistance with the required documents.
- All equipment/device/implant sets must contain a complete inventory checklist plus written

cleaning and sterilization instructions.

- This includes consigned and loaner instrumentation sets.
- The inventory list for each kit must be made available in hard copy and electronically in Excel format and be provided to the corresponding department.
- The inventory list must also be reconciled with the vendor and Cleveland Clinic personnel.
- All equipment and instrument trays must be removed within 48 hours of use.
- Upon completion of the surgical procedure, a complete inventory of any equipment, device, implant sets, or any other products brought into or used must be completed by the clinical staff.
- All instruments and related equipment used in the clinical area must be properly decontaminated prior to removal from Cleveland Clinic in accordance with Cleveland Clinic's policies and procedures.
- All staff training for new equipment, instrumentation or surgical instruments must be coordinated through Cleveland Clinic's clinical leadership at least one week prior to the scheduled surgical procedure.
- Under no circumstances will a Vendor Representative be permitted to:
  - Participate in hands-on delivery of patient care (e.g. scrub)
  - Provide initial training of equipment and/or supplies during a procedure
  - Independently hand up implants to the field. Implants must be verified by Cleveland Clinic caregivers following the Implant Verification process as outlined in the '[Universal Protocol Policy prior to implantation](#)'

## **Sustainability:**

### **Overview**

Cleveland Clinic is committed to leading the healthcare sector in developing a more sustainable future. Our Supply Chain Management (SCM) department is responsible for considering our environmentally preferred purchasing (EPP) policy when contracting goods/services and works with our supply chain partners to improve our environmental performance through specific criteria defined in our purchasing process.

### **Vendor Product Performance**

We require our vendors to provide us with sustainability metrics around our key enterprise goals and initiatives:

- **Waste Reduction and Recycling**
  - Eliminating excess packaging and reducing product waste
  - Increasing recycling rates by improving the recyclability and post-consumer content in products and their packaging
  - Fostering end-of-life product take-back programs & circular economies
- **Safer Chemicals**
  - Avoiding materials that become/generate hazardous waste and Persistent, Bioaccumulative and Toxic substances(PBTs)
- **Energy Conservation**
  - Increasing the number of energy efficient systems, processes and products to reduce overall energy consumption
  - Requiring EPEAT certification for electronic products
- **Climate Resilience**
  - Implementing ways to reduce the company's carbon footprint and emissions
- **Water Stewardship**
  - Reducing water pollution and consumption
- **Green Building**
  - Providing healthy work environments through buildings that comply with standards such as LEED, Fitwel or Well Building Standards
- **Healthy/Sustainable/Local Foods**
  - Inclusion of foods that are grown sustainably and locally

#### **Vendor Corporate Performance**

As a signatory of the UN Global Compact, the Cleveland Clinic is committed to promoting Human Rights, Labor Equality, Human and Environmental Health and Ethical Governance around the world. We hold our vendors to these standards as well by assessing each vendor's corporate environmental, social and governance (ESG) performance.

For more information on the Cleveland Clinic's commitment to sustainability and global citizenship, please see our [UN Global Compact Report](#).

#### **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 – Non-Employee Visitation and Onboarding Policy**

Cleveland Clinic Employees can access [here](#).

Vendor Representatives can access [here](#).

## Appendix B – Frequently Asked Questions – GHX/Vendormate Process

You must register in the GHX/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 GHX/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.

### **GHX/Vendormate Registration**

Who is required to register in GHX/Vendormate?

All on-site Vendor Representatives currently doing business with Cleveland Clinic are required to register in GHX/Vendormate, including but not limited to clinical and non-clinical representatives, Pharmacy representatives and consultants.

### **How do I register in GHX/Vendormate?**

Register at <https://dashboard.GHX/Vendormate.com>. Upon completion of registration and profile in GHX/Vendormate, please wait 3-5 business days to receive the next steps to complete MyLearning training. Until registration is completed in GHX/Vendormate, MyLearning credentials cannot be sent to the Vendor Representatives.

### **How do I upload documents into GHX/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 GHX/Vendormate Support at <https://www.GHX/Vendormate.com/vendors/support> for detailed information.

### **Who needs a TB test?**

A TB test is needed if the individual will be in a patient care area facility. As per Cleveland Clinic and CDC guidelines, vendors will be required to obtain the TB test.

### **What happens if I have a positive TB test result?**

If you have a positive TB test, further documentation is required. This may include; a chest x-ray dated within one year with no signs of active TB, or latest chest x-ray (within 5 years) with no signs of active TB accompanied by a symptom review or physician questionnaire/letter. 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?**

TB tests will be accepted from anywhere as long as the below requirements are met on the documentation.

### **TB Test Documentation Requirements:**

- First & Last Name
- The date the TB test was administered & read
- Results must be within the **past 6 months** to be acceptable
- Verification of a negative TB test
- Positive TB results require a chest x-ray and/or symptom review
- The address of the company/facility that administered & read the test
- The signature of the medical professional that administered & read the test

**The following Cleveland Clinic sites will accommodate non-employee TB testing: Cleveland**

#### **Clinic at Work- Garfield**

Monday–Friday, 7:30 a.m. – 4 p.m.  
Southside Corporate Centre  
5595 Transportation Blvd., Suite 220  
Garfield Heights, Ohio 44125  
Phone: 216.587.5431 | Fax: 216.587.5474

#### **Cleveland Clinic at Work- Medina**

Monday–Friday, 7:30 a.m. – 4 p.m.  
970 East Washington St., Suite 203  
Medina, Ohio 44256

Phone: 330.721.4955 | Fax: 330.721.4907

**Who needs a Flu vaccination?**

The flu vaccine is needed if the individual will be in a patient care area facility. As per Cleveland Clinic and CDC guidelines, vendors will be required to obtain the influenza (flu) vaccination.

**Where can I get my Flu vaccination?**

Flu shots may be administered anywhere (Wellness center, Pharmacy, Physician office, etc.) and will also be available at Cleveland Clinic at Work.

**Cleveland Clinic at Work- Garfield**

Monday–Friday, 7:30 a.m. – 4 p.m.

Southside Corporate Centre

5595 Transportation Blvd., Suite 220

Garfield Heights, Ohio 44125

Phone: 216.587.5431 | Fax: 216.587.5474

**Cleveland Clinic at Work- Medina**

Monday–Friday, 7:30 a.m. – 4 p.m.

970 East Washington St., Suite 203

Medina, Ohio 44256

Phone: 330.721.4955 | Fax: 330.721.4907

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