Engagement Requirements for Vendors
Administrative Policies & Procedures

General Description

Purpose: To establish minimum clearance requirements for certain vendors including health, background screenings and orientation attendance. To ensure compliance with the requirements established by federal and state regulations as well as those set forth by accrediting agencies, such as The Joint Commission.

Scope: All members of the Meridian Health workforce who have business relationships with vendors as defined in this policy, business associates, vendors and contractors.

Policy: Vendors, seeking to do business on site with Meridian Health shall:

- Complete the proscribed requirements related to background checks, health screening and orientation as noted in the "Vendor Requirements" document - attachment to this policy.
- Adhere to Meridian's requirements on Identification Badges and Sign In Procedures as defined in policy' MHS-ADMIN-01-1009 Vendor Access to Sites'.
- Maintain the confidentiality of information about Meridian patients, employees, organization, strategies and operations.
- Adhere to all applicable Meridian Code of Conduct and Compliance Policies as well as all applicable regulations as set forth in “Vendor Information” found on the Meridian website: http://www.meridianhealth.com. (Scroll down to the bottom of the page to find "vendor information.")
- Promptly notify Meridian Health of the voluntary or involuntary termination of individuals authorized to perform on site services on their behalf
- If applicable, agree to adhere to all policies and procedures related to the use of Meridian Information Systems

DEFINITIONS for the purposes of this policy are as follows:
Confidential Information:
Any and all information related to present or former patients, business and employee records, and intellectual property. This information includes but is not limited to patient and member lists, personal information, cost and pricing information, financial data, research data, strategic plans, transactional information and any other business data maintained by Meridian Health or any of its affiliates and/or contractors in any media including but not limited to written, electronic and oral as well as information systems used to create, transmit or store this information.

Vendor
A third party contracted or otherwise permitted to perform a service on site at a Meridian Health facility, such as equipment technicians, valet parking staff, construction personnel, contracted service personnel, physician office employees, pharmaceutical representatives, and sales representatives.

Direct Patient Care Provider
A team member who provides treatment or other clinical care to patients as an essential function of their job, including but not limited to all categories of the Medical and Nursing Staff, and Respiratory, Occupational and Physical Therapy Staff.

Indirect Patient Care Provider
A team member which has a presence in Patient Care Areas, but does not provide treatment or other clinical care and may interact with patients as an essential function of their job, including but not limited to building maintenance/engineering, food services, housekeeping, laboratory, pharmacy, sterilization services, Health Information Management staff, Biomedical device maintenance and calibration services.

Patient Care Areas
Areas where a patient is treated either directly such as a Medical/Surgical Unit, Intensive Care Unit or any other floor with patient rooms, beds or examining rooms as well as the corridors, meeting rooms and common areas contained therein, excluding areas accessible without thoroughfare through treatment areas.

Engagement Process
Process by which a vendor is chosen by Meridian team member to perform the services requested by Meridian. The process may include a request for proposal (“RFP”), a proposal, and a statement of work and/or a contract.
VENDOR CLASSIFICATIONS

**Patient Contact Category**
Vendor who performs the tasks of a Direct or Indirect Patient Care Provider and will have patient contact, potential patient contact, or contact with Meridian team members who are direct or indirect patient care providers.

By way of example: travel and agency nurses, physicists, perfusionists, HIM ROI staff, on site Clinical Program Developers and other practice based consultants, contracted Environmental Services staff, Medical Device Representatives or other representatives who in the performance of their role are present in patient care areas such as the Operating Room, Cardiac Catheterization suites.

**Visitor Category**
Vendor that will not be present on patient care units, is not a Direct or Indirect Patient Care Provider, will not come in contact with any patients or Meridian Direct or Indirect patient care providers; essentially acting as a “visitor” to the facility. Vendor relationship with Meridian requires regular, yet intermittent presence on site and are not in patient care areas.

By way of example: electricians, plumbers, contracted hardware repair services, vending machine technicians, and vendors that perform demonstrations, training or educational programs.

**Medical/Business Record Category**
Vendors with access to Meridian confidential information only, involving no contact with direct or indirect care providers. No presence in patient care areas is required. Vendors are engaged to perform a time limited, specific task, with access to Meridian confidential information, in any media.

Includes: External Chart Auditors (i.e. payors, no fault not External Case Managers), external financial auditors billing/coding auditors

**Law Enforcement Category**
Including civilian and military officers are not vendors, but are required to be on site for official business.

**Procedure:**

1. **Patient Contact Category Vendors**
The engagement process (RFP, contract review, proposal
design/signature) shall include:

- Completion of all requirements set forth in “Vendor Requirements" - attachment to this policy
- Completion of requirements set forth in policy 'MH-COMPLY-0006 Compliance Program Exclusion/Sanction Review Process'.
- Orientation as required for team members as outlined in policy 'MHS-HR-01-2211 Traditions & Leadership Fundamentals', policy 'MHS-HR-01-2212 Departmental Orientation', and policy 'MH-NUR-ADM 0015 Agency Nurses: Requirements and Orientation' or other requirements as defined in the contact for services or Statement of Work.

**IMPORTANT NOTE:** Departments which engage or interact with vendors who, with the exception of being involved in the delivery of patient care, fall into the direct patient care category are required to develop written policies and procedures governing orientation and sign in processes. This category may include External Case Managers, Service Professionals, such as Lactation or other counselors provided by the Department of Health or other such sources Television Rental Staff.

2. **Visitor Category Vendor**
   The engagement process shall include:
   
   - Adherence to the vendor sign in procedures and ID card issuance as set forth in "Vendor Requirements" - attachment to this policy and policy 'MHS-ADMIN-01-1009 Vendor Access to Sites'.

3. **Medical/Business Record Category**
   The engagement process shall include:
   
   - Adherence to vendor sign in procedures and ID card issuance set forth in "Vendor Requirements" - attachment to this policy and policy 'MHS-ADMIN-01-1009 Vendor Access to Sites'.
   - Execution of a Non Disclosure Agreement.
   - At all times be under the direct supervision of a Meridian Team Member involved in the engagement of the vendor.

4. **Law enforcement officers**
   Shall follow processes as outlined in the Forensic Patient Policy and will receive and be responsible for adherence to guidelines in the Forensic Patient Booklet

* Meridian Health may establish additional requirements for vendors in areas determined to be high risk.