



Vendor Orientation Checklist

Vendor Responsibilities for Conducting Business at University Hospital, Upstate Medical University

This checklist is designed to help the Category 1 vendor and Hospital Purchasing review information related to vendor responsibilities. Reviewing this information during the vendor's first several weeks of calling on University Hospital can facilitate a clear understanding of the Hospital's expectations for vendors as well as ensuring that vendor contacts and relationships support the service, teaching and research missions of UH, and maintain the highest ethical and professional vendor relations.

Be sure to provide a copy of the checklist to vendors so they can have it as a guide.

Both the vendor and UH staff member conducting the orientation should sign and date this form. A copy of the completed document will be kept on file at Hospital Purchasing.

Vendor Acknowledgement

I have been instructed on the information included in the vendor orientation checklist. I acknowledge my responsibility for understanding the expectations of my presence at University Hospital and have been given an opportunity to ask questions.

Date: _____

Vendor Representative's Name (please print):

Signature

Ph No.

Company Name

Supervisor's Name

Ph No.

UH Employee's Signature: _____



Vendor Orientation Checklist

Orientation Information	Source Document	X = Completed N/A = Non Applicable	Learning Resource	Initials Completed
<u>SUNY UPSTATE MEDICAL UNIVERSITY FUNCTION</u>				
General Vendor Orientation				
• Given copy of Vendor Guide	Vendor Guide		HP	
• Eligibility checked with Office of Inspector General	Vendor Policy Excerpt 1		HP	
• Completed EO127 as applicable	EO127 Forms		HP	
• Pricing confidentiality	Vendor Policy Excerpt 2		HP	
• Public phone usage	Vendor Guide		HP	
• Cell phone usage	Vendor Policy Excerpt 3		HP	
• Identification badge	Vendor Guide		HP	
• Parking	Vendor Guide		HP	
<u>HOSPITAL PURCHASING FUNCTION FOR CATEGORY 1 VENDORS</u>				
• Solicitation of products, equipment or services requires an appointment	Vendor Guide		HP	
• No 'cold calls'	Vendor Guide		HP	
• Appointments must be made a minimum of 24 hours in advance	Vendor Guide		HP	
• Check-in to pick up vendor visitor badge and sign in	Vendor Guide		HP	
• Badge must be worn at all times	Vendor Guide		HP	
• Completion of visit (Automated Checkout)	Vendor Guide		HP	
<u>HOSPITAL PURCHASING FUNCTION FOR ALL VENDORS</u>				



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Orientation Information	Source Document	X = Completed N/A = Non Applicable	Learning Resource	Initials Completed
<ul style="list-style-type: none"> • New Products and Equipment 	Vendor Guide		HP	
<ul style="list-style-type: none"> • Samples 	Vendor Guide		HP	
<ul style="list-style-type: none"> • Products for evaluation 	Vendor Guide		HP	
<ul style="list-style-type: none"> • Equipment 	Appendix A		HP	
<ul style="list-style-type: none"> • Vendor must complete and sign "Vendor Release" form 	Appendix A		HP	
<ul style="list-style-type: none"> • "no charge" purchase order must be issued by Hospital Purchasing 	Vendor Policy Excerpt 4		HP	
<ul style="list-style-type: none"> • Training provided by vendor 	Vendor Policy Excerpt 5		HP	
<ul style="list-style-type: none"> • Only equipment approved by FDA can be brought into the facility 	Vendor Policy Excerpt 6		HP	
<ul style="list-style-type: none"> • Vendor retains title to equipment 	Appendix A		HP	
<ul style="list-style-type: none"> • Vendor is responsible for all preventive maintenance and repair 	Appendix A		HP	
<ul style="list-style-type: none"> • Purchase commitments and/or contract signatures 	Vendor Guide		HP	
<ul style="list-style-type: none"> • Vendor Initiated Recall or Replacement 	Vendor Policy Excerpt 7		HP	
<ul style="list-style-type: none"> • Attendance at Hospital meetings and/or presentations 	Vendor Guide		HP	
<ul style="list-style-type: none"> • Gifts and Food 	Vendor Policy Excerpt 8		HP	
<ul style="list-style-type: none"> • Department specific vendor policies 	Individual Departments		HP	
<ul style="list-style-type: none"> • Violation of policies 	Vendor Guide		HP	
<ul style="list-style-type: none"> • Questions 	Vendor Guide			