I. DECLARATION OF INTENT AND SCOPE:

A. Purpose

The purpose of this Policy is to regulate the presence and movement of Vendor Representatives, Contractor Personnel and Visitors while on Jackson Health System (JHS) Premises. The procedures and requirements of this Policy have been established to provide a secure environment to protect the efficiency and integrity of physicians, other health care providers and employees; to support patient safety, privacy and family-centered care; and to maintain the integrity of the procurement process. This Policy also supports Public Health Trust (PHT) policy against unauthorized vendor influence. The activity of Vendor Representatives, Contractor Personnel and Visitors must be coordinated and controlled to meet the JHS need for security and transparent business practices.

B. Scope

This Policy applies to all Vendor Representatives, Contractor Personnel and Visitors while on JHS Premises as defined herein. Patients are not considered Visitors and are not covered by this Policy.

C. Implementation

All JHS executives, Medical Staff Members, managers, supervisors and staff, as well as University of Miami employees working on JHS Premises, are responsible for ensuring compliance with this Policy as it applies to Vendor Representatives, Contractor Personnel and Visitors within their respective work areas. The Division of Public Safety is authorized to deny access to JHS Premises to Vendor Representatives, Contractor Personnel and Visitors who fail to comply with any requirement of this Policy.

D. Specific Repealer

This Policy supersedes all department rules or guidelines to the contrary and specifically repeals PHT Redbook Policy No. 126, Vendor Representatives Guidelines, dated May 1, 2004.

II. POLICY:

A. Definitions

The following terms used in this Policy shall have the following meaning, except when it is clear from the context that another meaning is intended:

1. Vendor Representative – A Vendor Representative is any person, as an agent of an entity or on his or her own behalf, who visits JHS Premises for the purposes of marketing, selling or promoting the exchange of goods or services to the PHT, JHS Medical Staff Members or JHS Employees. This includes, but is not limited to, Pharmaceutical, Supply, Equipment and other Sales Representatives, regardless of whether they presently hold contracts with JHS. As set forth in Section II.B of this Policy, Vendor Representatives must obtain and display both (1) a Permanent Badge titled "Vendor" that expires annually and (2) a Temporary ID that expires daily.

2. Contractor Personnel – Contractor Personnel is any person working on JHS Premises pursuant to an existing contract with Jackson Health System limited to the products and services presently included under that contract. Contractor Personnel must be sponsored by a JHS user department and include, for example, routine service/maintenance personnel, agency nurses, other temporary staffing personnel, company service technicians, consultants, and construction workers. Contractor Personnel must adhere to the Identification/Badge requirements set forth in Section II.C. of this Policy.

3. Visitor – A Visitor is any person on JHS Premises who is not a patient, Vendor Representative, Contractor Personnel, JHS Employee, JHS Medical Staff Member, or University of Miami employee working on JHS Premises,

4. JHS Medical Staff Member – Includes any member of the medical staff who is credentialed to provide healthcare services at any clinical facility operated by the Jackson Health System, including but not limited to University of Miami clinicians and community based physicians.
5. JHS Employee – Means all executives, clinicians, managers, staff (clinical, administrative, and technical), interns, residents, and fellows, whether full-time, part-time or temporary, who are presently on the JHS payroll.

6. Permanent Badge – This is the hard, plastic badge issued by the JHS Division of Public Safety to all approved Vendor Representatives and qualifying Contractor Personnel under this Policy. This badge expires annually, is the property of JHS, and must be worn in a visible location above the waist at all times while on JHS Premises.

7. Temporary I.D. – This is the paper badge issued on a daily basis by the JHS Division of Public Safety to all approved Vendor Representatives, qualifying Contractor Personnel, and Visitors under this Policy. This badge expires daily and contains a photo, name, date, time of entry, destination and daily expiration date. Individuals wearing a Temporary I.D. are only authorized to access the destination designated on the badge and public areas, such as the cafeteria and gift shop.

8. JHS Premises – For the purposes of this Policy, JHS Premises includes the following buildings: all in-patient buildings that are part of Jackson Memorial Hospital, Holtz Children's Hospital, Jackson Mental Health Hospital Center, Jackson Memorial Rehabilitation Center, Ryder Trauma Center, Jackson North Medical Center, and Jackson South Community Hospital. The President/Chief Executive Officer may place additional JHS facilities on this list by notifying the JHS Division of Public Safety in writing.

B. Vendor Representatives

1. Lobbyist Registration and Vendor Registration:

(a) Pursuant to Section 2-11.1(s), Code of Miami-Dade County, all Vendor Representatives, prior to engaging in any conversation or communication, verbal or written, with a County/JHS Employee or JHS Medical Staff Member for the purpose of selling, marketing or influencing a decision to purchase any product or service that shall require the expenditure of County/JHS funds, must first become "registered" with the County as a "lobbyist". Accordingly, a necessary condition to becoming qualified as a Vendor Representative at JHS is the completion of "Lobbyist Registration" with the County. The County Code prescribes that "Lobbying Registration" is administered by the Clerk of the Board of County Commissioners, and requires annual

renewal of the registration and the filing of annual expenditure reports. The main phone number for the Clerk of the Board of County Commissioners is (305) 375-5137, and its website for online services is http://www.miamidade.gov/govaction and the link to "Lobbyist Registration."

(b) In addition to the foregoing, all vendors/manufacturers are required on an annual basis to register with the Trust's Procurement Management Department by completing a Business Registration Application prior to receiving a contract award. Detailed instructions may be obtained by accessing the Department's website at www.jhsmiami.org under the "Other Services" link.

2. Vendor Representative Access/Appointments:

(a) Vendor Representatives must have a scheduled appointment to visit JHS Premises; unsolicited visits are prohibited. All appointments on JHS Premises must be made by the Vendor Representative, in advance, regardless of whom the Representative would like to visit.

(b) Vendor Representatives are not permitted to meet professional staff in any patient care unit, including inpatient units, nursing stations, physician lounges, outpatient clinics (patient areas), perioperative and operative areas and the Emergency Department. Vendor Representatives must conduct meetings ONLY in offices or non-clinical conference rooms affording privacy. Vendor Representatives are barred completely from the Intensive Care Units (ICU) unless they are entering as a subject matter technology expert in the role of technician or consultant pursuant to department policy and guidelines. Access is limited to the office or conference room they have been authorized to visit. No lingering or socializing in any hospital hallway will be permitted. Meetings shall not be permitted in JHS public areas such as cafeterias, hallways, telephone areas, elevators and parking garages, nor in inpatient care units.

(c) Due to patient confidentiality concerns, Vendor Representatives are not permitted to attend any conferences or reports at which protected health information is shared. Vendor Representatives may not see patients, review their charts or any portion of the patient medical record, whether in electronic or paper format, go on rounds or attend surgery.

Vendor Representatives are prohibited from all clinical areas and conference rooms on inpatient units where there may be potential for patient health information to be shared.

3. Vendor Representative Procedures for Checking in:

Upon their arrival and prior to their scheduled appointment, all Vendor Representatives must check in with the JHS Division of Public Safety at a designated visitor management station and follow the Identification/Badge Requirements set forth in Section II.B.4 of this Policy. At that time, they will be issued a Temporary I.D. for that day, with his/her photo, name, date, time of entry and destination. The Vendor Representative must wear the Temporary I.D. next to their Permanent Badge at all times while on JHS Premises, and display the I.D. in a visible location above the waist. This Temporary I.D. will control the Vendor Representative's daily access to JHS Premises, and will expire daily. The location of the designated visitor management stations can be obtained by contacting the Division of Public Safety at (305) 585-6107.

4. Identification/Badge Requirements:

(a) Vendor Representatives who visit JHS Premises for five business days or less, during a 12 month period, may do so with the use of a Temporary I.D. issued by the JHS Division of Public Safety as described above in Section II.A(3), without a Permanent Badge.

(b) Vendor Representatives who visit JHS Premises for more than five business days during a 12 month period must comply with the application process set forth below and wear both a Permanent Badge and a Temporary I.D.

(i) All Vendor Representatives who visit JHS Premises for more than five business days during a 12 month period must maintain a current data file and be approved by the JHS Procurement Management Department ("PMD"). To obtain approval, each Vendor Representative must submit a completed "JHS Vendor Representative Application Form" to the PMD including:

- Vendor Representative name and title;
- Company represented;
- Company address;
- Company telephone number;
- Representative's and Company's e-mail address;
- Nature of business;
- Acknowledgment of receipt of confidentiality statement;
- Proof of Current Lobbyist Registration with Miami-Dade County (see Section II.B.1 of this Policy);
- Company contact for conflict of interest forms;
- Supervisor's name and contact information;
- Agreement to abide by the terms and conditions of the JHS Vendor/Contractor/Visitor Access & Activity Policy and all JHS/PHT Policies governing vendor conduct.

(ii) Once the Vendor Representative has submitted the required "JHS Vendor Representative Application Form" and information as outlined above, and if the Application is approved, the PMD will forward a "Vendor Representative Access/Badge Request Form," signed by the Director of the PMD or his/her designee, to the JHS Division of Public Safety. The aforementioned forms are issued by the Vice President of Strategic Sourcing (Chief Procurement Officer). If approved by the Division of Public Safety, and subject to payment of a $25.00 Permanent Badge fee by the Vendor Representative, the Vendor Representative will be issued a Permanent Badge. This badge signifies completion of the above JHS Vendor Representative requirements and must be worn by the Vendor Representative in a visible location above the waist at all times he/she is on JHS Premises. The Permanent Badge must be worn in addition to the Temporary I.D. and is the property of JHS. Upon a Vendor Representative's termination of employment, loss of JHS privileges, or any other reason terminating the Vendor Representative's relationship with their employer or presence at a

JHS Premises, the Vendor Representative, or the Vendor Representative's employer, must return the badge to the JHS Division of Public Safety. If the Permanent Badge is lost, the Vendor Representative or their employer shall immediately report the loss of this badge in writing to the JHS Division of Public Safety, which will prepare an incident report.

C. Contractor Personnel

1. Identification/Badge Requirements:

(a) All agency nurses and other temporary staffing personnel must comply with the Identification/Badge Requirements established by the Division of Public Safety and the JHS Central Staffing Office. For purposes of this Policy, all agency nurses and other temporary staffing personnel are excluded from the Identification/Badge Requirements described below.

(b) Contractor Personnel, except as excluded in Section II.C.1.(a), who intend to work on a JHS Premises for five business days or less during a 12 month period must check in at a designated visitor management station where they will be issued a Temporary I.D. by the JHS Division of Public Safety. The Temporary I.D. will include his/her photo, name, date, time of entry, destination, and a date of expiration. Contractor Personnel shall display the Temporary I.D. in a visible location above the waist at all times while on JHS Premises.

(c) Contractor Personnel, except as excluded in Section II.C.1.(a) who intend to work on a JHS Premises for more than five business days during a 12 month period, or who have in fact worked on a JHS Premises for more than five business days during a 12 month period, shall obtain a Permanent Badge issued by the JHS Division of Public Safety. The badge will state the sponsoring JHS department and will include an expiration date. To obtain a Permanent Badge, the Administrator or Director within the sponsoring JHS department must complete, sign and submit a "Contractor Personnel Access/Badge Request Form" to the JHS Division of Public Safety. The Permanent Badge is the property of JHS. Contractor Personnel shall display the Permanent Badge in a visible location above the waist at all times while on JHS Premises. Upon the expiration or termination of their contract,

Contractor Personnel must return their Permanent Badge to the JHS Division of Public Safety. The sponsoring JHS department is responsible for enforcing this provision.

2. Contractor Personnel Who Engage In Sales Or Marketing Activities:

If, at any time, Contractor Personnel also engage in sales or marketing activities performed by a Vendor Representative as described in Section II.B above, then the individual shall be treated as a Vendor Representative under this Policy with all of the corresponding I.D. badge and Lobbyist Registration requirements.

3. Work Performed By Contractor Personnel In Patient Care Areas:

If any work is to be performed in a patient care area, the Unit Supervisor for that area is responsible for ensuring that patient privacy is protected to the fullest extent possible for the duration of the work performed.

D. **Visitors**

1. Patient Related:

Visitors wishing to visit a patient on an in-patient unit must obtain a Temporary I.D. from a designated visitor management station. This I.D. will display the Visitor's photo, name, date, time of entry and destination. The Visitor is limited to the patient care area that is designated on the Temporary I.D. and may also access public areas such as the cafeteria and gift shops. Visitors shall display the Temporary I.D. in a visible location above the waist at all times while on JHS Premises. All Visitors are encouraged to respect established patient visiting hours as set forth in PHT Policy 169.

2. Non-Patient Related:

Visitors wishing to visit any person in a JHS Premises that is not a patient must obtain a Temporary I.D. from a designated visitor management station. The Visitor is limited to the destination designated on his or her I.D. and public areas. All such visits must be by

appointment and must take place in an area that respects patient privacy, such as an administrative office or conference room. Government officials and persons accompanied by identified Jackson Memorial Foundation (JMF) employees or agents, including prospective JMF donors, must have a Temporary I.D., but may access the JHS Premises without a scheduled appointment provided that (1) their visit is coordinated with the Executive Office and (2) they are accompanied by a JHS Employee. Visitors shall display the Temporary I.D. in a visible location above the waist at all times while on JHS Premises.

3. External Regulatory Agency Representatives:

Representatives from external regulatory agencies may access JHS Premises without an appointment provided that (1) they wear their agency ID Badge in a visible location at eye level and (2) they report to the Executive Office immediately upon their arrival. State and Federal surveyors do not have to be accompanied by a JHS Employee in order to access JHS Premises.

4. Visitors Who Engage In Sales Or Marketing Activities:

Visitors who also engage in sales or marketing activities performed by a Vendor Representative as described in Section II, above, shall be treated as a Vendor Representative under this Policy with all of the corresponding Identification/Badge requirements and Lobbyist Registration requirements.

E. Procedures and Limitations Governing Vendor Representatives and Contractor Personnel

1. Non-Formulary Items and Formulary Changes:

(a) Vendor Representatives/Contractor Personnel are not allowed to discuss non-formulary items with JHS Medical Staff Members under any circumstances. If a JHS Medical Staff Member asks a Vendor Representative/Contractor Personnel about non-formulary items or indications outside approved criteria, the Vendor Representative/ Contractor Personnel is not permitted to respond and must refer the JHS Medical Staff Member to the Department of Pharmacy Services.

Vendor Representatives/Contractor Personnel are only permitted to promote formulary items limited to and in accordance with the restrictions and/or guidelines approved by the PHT Pharmacy and Therapeutics Committee (P&T) and/or the Product Review and Analysis Committee (PRAC)/Value Analysis Team. Discussions with JHS Medical Staff Members concerning formulary items must be limited strictly to the JHS approved guidelines and criteria for use of the item. Vendor Representatives/Contractor Personnel should contact the JHS Department of Pharmacy for this and related information.

(b) JHS is responsible for notification to medical and nursing personnel of changes to the Formulary (additions, deletions, restrictions, etc.) as approved by the P&T and PRAC. JHS is responsible for all communication of policies and procedures regarding the availability, status, and usage of pharmaceutical products and medical supplies to the hospital staff, including JHS Medical Staff Members and nursing staff. Vendor Representatives/Contractor Personnel shall make no statements to members of the medical and nursing staff regarding such policies and procedures. As necessary, inquiries and comments are to be directed to the Department of Pharmacy Services for clarification and/or action.

(c) Promotional activities which are not consistent with P&T Committee & PRAC/Value Analysis policies and procedures regarding review, restrictions, drug and/or supply utilization criteria are prohibited and considered a violation of these rules.

2. Pharmaceutical Samples:

Sample drugs are not permitted in any JHS Premises. Sample drugs may not be used or issued to patients by any JHS Medical Staff Member, JHS Employee, Vendor Representative or Contractor Personnel. Vendor Representatives/Contractor Personnel are strictly prohibited from providing sample drugs in all JHS Premises. All JHS Medical Staff Members and JHS Employees are prohibited from soliciting and/or accepting sample drugs for their personal use from Vendor Representatives/Contractor Personnel.

3. Educational Programs:

All training or educational programs must be pre-approved for content, in writing, by the Chief of service/designee, the Pharmacy Department, and/or PRAC/Value Analysis, and must not exceed the scope of the content approved. Copies of lecture content shall be provided to the Supply Chain or Pharmacy Departments at least one month prior to the program date. Any restrictions or guidelines for use must be stated in the content of the program. Provision of medical education regarding pharmaceuticals is limited to medical personnel (i.e. M.D., Pharm.D., R.N., etc.) and cannot be provided by Vendor Representatives or Contractor Personnel that do not have a degree in medical sciences. Programs must not be scheduled in any patient care area or unit, including inpatient units, nursing stations, conference rooms, physician lounges or outpatient clinics.

4. Operating Room Access:

   Vendor Representatives or Contractor Personnel who will be entering the operating room in the role of technology subject matter experts must be familiar with and observe the requirements for JHS Vendor Procedures in the Perioperative Setting set forth in PHT Supplemental Policy 249.

F. Criteria for Delivery & Use of General Supplies, Medical Supplies and Medical Equipment

1. All supply deliveries to the main JHS Premises will be done by delivering through the Supply Chain receiving area, located at 1100 N.W. 20th Street. Delivery hours are from 7:00 a.m. to 2:30 p.m. Off hour deliveries are not accepted unless it is an emergency. Emergency deliveries must be coordinated through the Supply Chain Management Department and the Division of Public Safety. Any exceptions to this procedure must be approved by the Division of Public Safety.

2. Deliveries to the JHS clinics and satellites, Jackson North Medical Center and Jackson South Community Hospital shall continue to be delivered directly to those locations.

3. Equipment deliveries that require technical set-up in or around a patient care area, once received by the Receiving Area, may be delivered by the

Vendor Representative to the specified area of the hospital by appointment and with the approval and accompaniment of the Unit Supervisor.

4. All new, loaner, rented or trial evaluation medical equipment must be inspected and approved by the Biomedical Department prior to being used for patient care in a JHS facility.

5. Training must be provided to staff on all shifts prior to any new technology or equipment being introduced in a JHS facility. Vendor Representatives may only present training content that has been previously discussed and approved by the appropriate department. The department receiving the equipment is responsible for properly documenting that all training has been provided.

G. Sanctions

1. Violations or non enforcement of any of the requirements of this Policy by JHS Employees may result in disciplinary action up to and including termination.

2. Violations or non enforcement of any of the requirements of this Policy by JHS Medical Staff Members may result in disciplinary action in accordance with the PHT Medical Staff Bylaws.

3. Violations or non enforcement of any of the requirements of this Policy by University of Miami employees working on a JHS Premises may result in disciplinary action in accordance with University of Miami personnel procedures, and may also result in the suspension or removal by JHS of the UM employee's privileges to work on JHS Premises.

4. Violations by Vendor Representatives or Contractor Personnel of the requirements of this Policy may result in sanctions against either the individual, and/or the company (vendor or contractor) for whom the individual works. These may include the suspension of individual visitation privileges to all JHS Premises, a request that the company replace the individual, or the suspension of visitation privileges for the entire company. Violations of this Policy by a Vendor Representative or Contractor Personnel may also result in vendor/contractor suspension or

debarment under the PHT Procurement Regulation and/or the termination of existing JHS contracts.

5. Vendor Representatives and Contractor Personnel, and the companies for whom they work, may appeal any sanction imposed under this Policy in accordance with the review/appeal provisions of Section XII. C. of the PHT Procurement Regulation.

AUTHORIZATION:

Marvin O'Quinn, President, Public Health Trust