



**Columbia St. Mary's**  
*A Passion for Patient Care*

# **SUPPLIER ORIENTATION AND REFERENCE MANUAL**

Prepared by:

Columbia St. Mary's, Inc.  
Materials Management Department  
4425 N. Port Washington Road  
Glendale, WI 53211

# SUPPLIER ORIENTATION VALIDATION FORM

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**NOTE:**

**THIS IS THE WEB-BASED VERSION OF THE SUPPLIER ORIENTATION MANUAL. PLEASE EMAIL OR VISIT PURCHASING TO OBTAIN THE FORMS REQUIRED BY EACH REPRESENTATIVE CALLING ON A COLUMBIA ST. MARY'S FACILITY.**

**FAILURE TO EXECUTE THIS DOCUMENTATION WILL RESULT IN ACCESS RESTRICTIONS TO OUR FACILITIES.**

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It is required that all Suppliers read the Orientation and Reference Manual before performing any services at any Columbia St. Mary's facility. After reading and clearly understanding the information contained in the Orientation and Reference Manual, each Supplier is required to sign and date this form. This form is to be returned to the Columbia St. Mary's Purchasing office for validation and filing purposes.

COMPANY NAME: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_

NAME: \_\_\_\_\_

Signature

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

DATE: \_\_\_\_\_

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# **Columbia St. Mary's Supplier Orientation Manual**

Revised April, 2007

This manual has been designed for the suppliers providing goods and services at Columbia St. Mary's Hospitals to use as an orientation to the Hospital's purchasing procedures. It is the supplier's responsibility to review this manual thoroughly prior to working at any hospital or facility.

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## **WELCOME AND GENERAL INFORMATION**

### **COLUMBIA ST. MARY'S TELEPHONE NUMBERS AND CONTACTS**

Materials Management	414-326-1775
Purchasing Department	414-326-1775
St. Mary's Milwaukee Receiving	414-291-1676
St. Mary's Ozaukee Receiving	262-243-7360
Columbia Receiving	414-961-3743

We wish to welcome you to Columbia St. Mary's. This orientation manual, along with any information provided by specific departments, will provide you with the policies and procedures to be followed while at Columbia St. Mary's.

Columbia St. Mary's is a part of Ascension Health. Ascension Health Supply Chain Management's primary objective –reducing supply expenses while maintaining clinical excellence – helps manifest the organization's Mission to serve all people, with special attention to those who are poor and vulnerable. Consistent with Ascension Health's Call to Action, Supply Chain Management collaborates with a number of systemwide initiatives to achieve Healthcare That Works, Healthcare That Is Safe, and Healthcare

That Leaves No One Behind.

The Columbia St. Mary's system is comprised of four hospitals – Columbia St. Mary's Columbia Campus, Columbia St. Mary's Milwaukee Campus, Columbia St. Mary's Ozaukee Campus, and Sacred Heart Rehabilitation Institute – as well as more than 30 primary care clinics, the Columbia College of Nursing, Riverwoods Outpatient Center, and a partnership with the Orthopaedic Hospital of Wisconsin.

In late 2009, our Columbia and Milwaukee Campuses will combine when we open our new Lake Drive Campus on Milwaukee's East Side.

Columbia St. Mary's serves individuals and families in Milwaukee, Ozaukee, and Washington counties with more than 155 years of service.

As part of Ascension Health System, Columbia St. Mary's participates in the BROADLANE group purchasing organization.

As a part of the Materials Management Division, Purchasing is committed to serving our customers by providing the right product to the right place at the right time. The Materials Management Division realizes that strong relationships with our suppliers are necessary in order to fulfill that commitment. Therefore, we seek suppliers that have a track record of dependability and cooperation and who respect the values of Columbia St. Mary's.

We welcome suggestions that will enhance the buyer-seller relationship and help our organization provide high-quality, cost effective health care services.

Adherence to the guidelines in this Supplier Process Booklet will be critical to the success of your partnership with our organization.

## **PURCHASING AND MATERIALS MANAGEMENT OVERVIEW**

The Columbia St. Mary's Materials Management Department is located at 4425 N. Port Washington Road, Glendale, WI, 414-326-1775. Business hours are 8:00 a.m. – 4:30 p.m. Monday through Friday. Unscheduled visits by suppliers are not permitted. Unsolicited meetings with line staff (e.g., buyers, purchasing assistants and clinical staff) are prohibited.

The Purchasing Department is the primary contact between Columbia St. Mary's clinicians and its suppliers. In cases where clinical issues have made it advisable, Purchasing will direct the supplier to the proper personnel. When this is necessary, Purchasing is to receive full communication and correspondence related to such instances.

### **VALUE ANALYSIS**

A Value Analysis process is in place to identify clinical issues with current products and invite new products into the system. Purchasing will contact the supplier and make arrangements for new products to be evaluated or introduced. Value Analysis product committees and departments work together to obtain product standardization, operational efficiencies and supply cost reduction.

### **AUTHORITY**

The Columbia St. Mary's Purchasing Department has the sole authority and responsibility to purchase all supplies and services. This excludes perishable food products, which are purchased by the Food and Nutrition Services Department, and pharmaceuticals, which are purchased by the Pharmacy Department.

Suppliers are cautioned against acting on oral or written requests for supplies, equipment, or services from any department or individual unless accompanied by a specific purchase order number. CSM will not be responsible for orders accepted or shipped by Suppliers without the Purchase Order Number. The Purchase Order number should appear on all invoices,

packages, bills of lading, and packing lists.

CSM is not responsible for any agreements that may exist that were completed by persons without the authority to do so.

#### **DISCLOSURE**

- CSM must be provided with information that will permit us to communicate with the supplier representatives and their direct superior in a quick and easy fashion.
- Suppliers are required to identify CSM employees and medical staff who may have an equity position, consulting or other remuneration relationship with the supplier.
- Suppliers are asked to identify if their company is a certified minority supplier, has a more than 50% ownership by women or disabled American veterans.

#### **GENERAL REQUIREMENTS**

All visits to CSM departments are to be by prior appointment. All suppliers must review the orientation/ training information provided in this booklet before performing any work at any Columbia St. Mary's facility. Not all sections will apply to those representatives who do not have direct patient access. Additional orientation/training may apply to those clinical representatives that have direct patient access.

#### **ENFORCEMENT OF SAFETY REGULATIONS**

Columbia St. Mary's is first and foremost concerned about the safety and well-being of our patients, visitors, and associates. Suppliers are expected to be concerned for their own safety and the safety of others. Compliance with Columbia St. Mary's policies, procedures and governmental safety regulations is required.

## APPOINTMENTS

Supply Chain and Purchasing: Appointments may be scheduled Monday through Friday by appointment only.

Pharmacy: Please contact Pharmacy directly.

All Other Departments: If you wish to call on a specific department, please schedule the interview. Unscheduled visits are not acceptable.

## PARKING

Upon arrival at a Columbia St. Mary's facility, suppliers should park in public parking areas.

## SIGN IN/CHECK IN

Please register with at the designated locations before proceeding to a scheduled appointment. Upon arrival at the Hospital, all individuals must sign-in as designated below and contact the department with which they will be working.

SMM-Security

CH - Security

SMO – Front Desk

RW –Front Desk

## IDENTIFICATION

All individuals must wear their company's identification badge, Columbia St. Mary's supplier identification badge or other identification deemed appropriate by Columbia St. Mary's Security at all times. Private-issue scrubs are not appropriate within the CSM facility. If your work requires protective apparel, CSM will provide for you.

## NO SMOKING POLICY

There will be no smoking at any Columbia St. Mary's facility. This policy will be strictly enforced.

## WARNING SIGNS AND LABELS

Suppliers are expected to observe and obey all warning signs and labels. These include, but are not limited to the following:

1. Biohazard labels or the color red for biohazards or infection waste;
2. Signs on rooms specifying restricted entry or required personal protective equipment.
3. Restricted entry to Authorized Personnel Only.

If you have questions about restrictions or requirements for entering a certain area of a facility, please consult with an associate in the area of the department for which you are working.

## FIRE SAFETY

As each such occurrence is unique, the hospitals rely upon the judgment of associates and suppliers to react in a manner most conducive to the safety of patients, visitors and hospital associates. Should a life-threatening situation exist, preservation of human life should take priority.

During a Code Red, which is the code name for fire, try to remain calm. The greatest danger in most fires is panic. **NEVER SHOUT FIRE!**

It is the responsibility of the individual supplier to be oriented as to the nearest fire escape route in relation to where they are. If necessary, contact the department that contracted the work for fire escape route information.

## COMMUNICATION DEVICES

Cell phone use is prohibited in all patient treatment areas. Cell phones can be used in the lobby, outside of the building, and in other areas where patients are not being treated.

## YOUR ASSISTANCE

1. Keep the Purchasing Department informed regarding product and service developments, changes, improvements, etc.
2. Insist on an authorized purchase order for every product or service. Ensure that the purchase order number is clearly marked on every package label, packing list and invoice. (Includes "no charge" and "sample" products.)
3. Please follow-up on any back orders and keep the Hospital informed of anticipated delivery dates.
4. Suppliers are to disclose immediately any proposed or actual debarment, exclusion or other event that makes the individual or entity ineligible to participate in the Federal health care programs or Federal procurement or non-procurement programs.

## **PHYSICIAN REQUESTS FOR SUPPLIES, EQUIPMENT, OR INSTRUMENTATION**

If a physician contacts a supplier and requests that the supplier either bring in a specific item for a procedure and/or be present during a procedure, the supplier should contact the appropriate Department Director to schedule their visit. CSM is not responsible for payment for items brought in without a Purchase Order. Pricing agreements are required in most instances. By contacting Purchasing prior to the case, a Purchase Order can be issued with minimal delay.

Instrumentation that is brought to CSM for a procedure should arrive 24 hours in advance for sterilization and check-in procedures.

Suppliers should not touch any equipment or participate in any manner in the procedure or care of the patient except as an advisor.

## **INSURANCE**

Service Agreements: General Liability Certificate of Insurance (COI) required of all providers of patient care services, equipment, and patient care equipment repair.

- \$1,000,000 per occurrence, aggregate \$2,000,000 (medical) and \$1,000,000 (ordinary).

Products: Product Liability Insurance coverage is required for certain types of invasive products. CSM prefers occurrence-based to claims-made. Policy limits should be in the millions and a minimum of \$3 million annual aggregate

If this document is available in electronic form, submit to [purchasing@columbia-stmarys.org](mailto:purchasing@columbia-stmarys.org). Otherwise, fax to 414-326-1771.

## **PRODUCT EVALUATIONS/ LOANERS**

### **EVALUATION OF NEW PRODUCT**

Mail, email or bring with you any literature for new products. This information will be distributed to the appropriate departments, as required. If the department is interested in setting up an appointment to discuss the product, you will be contacted.

In no event is the Supplier to leave product with any departments unless an authorized purchase order has been issued and appropriate training to use the product has been conducted.

Questions regarding this policy should be directed to the Purchasing Department. No trials are authorized without the prior approval of the Purchasing Department.

### **EQUIPMENT/PRODUCT DEMONSTRATIONS**

Only the Purchasing Department is authorized to approve equipment demonstrations and evaluations. This approval will be communicated by the issuing of an authorized purchase order or communication from the Purchasing Department to commence the demonstrations and/or evaluations. The Hospitals accept no responsibility for equipment and product delivered to any Hospital(s) and/or department(s) without prior clearance, by issue of a purchase order, through the Purchasing Department. In no event will equipment demonstrations and evaluations be approved for any equipment or services that would be contrary to the Ethical and Religious Directives for Catholic Health Care Services.

Equipment and goods provided for evaluation purposes are to be provided free-of-charge via a no-charge purchase order issued through the CSM Purchasing department.

Products provided by suppliers, not authorized through the Value Analysis process will be considered a donation, and will not be eligible for payment.

Suppliers will only display or discuss approved items, non-compliance with this may lead to limited access to CSM for the supplier.

## LOANER EQUIPMENT

Loaner equipment must be clearly identified and checked in through the Department. The company loaning the equipment will be responsible for damage and routine repairs, and assume liability for any damages claimed by a patient in connection to its use. Delivery of loaner equipment to CSM must be arranged to allow adequate time for Biomedical Engineering personnel to perform all necessary tests and approve the equipment for use.

The supplier must clearly communicate the status of FDA clearances, MSDS sheets when applicable, and other relevant approvals of any product being left at the facility.

## RETURNS

It is imperative that the Purchasing Department is notified of any supplies or equipment returned to the supplier. This includes products or equipment picked up by sales representatives. Sales representatives are required to sign the Request to Return form in CSM policy 0821.

## PURCHASE ORDERS

No shipments will be accepted by Columbia St. Mary's Hospitals without a valid purchase order issued by the Purchasing, Pharmacy, or Food Services Departments. Columbia St. Mary's accepts no responsibility for materials or equipment shipped without a valid purchase order number.

## DELIVERIES

Shipments that are inadequately labeled may be refused. The Purchase Order Number must appear on the outside label. All shipments that require special handling should be coordinated with the appropriate department in advance. Columbia St. Mary's accepts no responsibility for shipments that are not marked appropriately or that are left at the Receiving Dock without the signed approval of a Receiving Associate.

Shipments will be accepted between the hours of 0830 to 1500 hours (8:30 a.m. - 3:00 p.m.)

UNLESS OTHERWISE NOTED ON THE PURCHASE ORDER, shipments are to be directed to:

Columbia St. Mary's Hospital, Inc.  
Materials Management Distribution Center  
Attn: Receiving Dock  
202 W. Olive St.  
Glendale, WI 53212

## SHIPPING RETURNS

All items shipped in error or damaged will be returned "freight collect" if arrangements for the return have not been made by the Supplier within ten (10) days after notification to the Supplier by the Purchasing Department.

## ACCOUNTS PAYABLES/INVOICES

All invoices are to be mailed to the Attention of the Accounts Payable Department, PO Box 364, Milwaukee, WI, 53201-0364. Inquiries concerning payments are to be directed to Accounts Payable at (414) 326-2255. All invoices must reference a valid purchase order number.

- CSM pays by specific invoices and does not make payments "on account." Cash received should not be applied to a running balance or applied to the oldest invoice.
- When appropriate, payments from statements will be for current charges only. CSM does not pay a "balance forward" or "running balance."
- Individual deductions will be recorded as a separate transaction and will appear as an individual entry on the remittance.
- CSM does not use credits to pay invoices. Credits will be deducted as a separate transaction.
- CSM does not pay interest on outstanding balances.
- Suppliers do not have the authority to apply credits to open invoices or other outstanding future charges.
- CSM does not make pre-payments other than for deposits made as part of a purchase agreement or "custom" orders.
- Any "open" invoices that exceed 12 months from the first date issued will be considered closed and no further activity will be conducted.

- Any modifications to a purchase order will not be accepted without an amendment to the original purchase order.

Suppliers shall conduct regular business reviews with CSM to assure timely resolution of invoice discrepancies. CSM will not pay suppliers any late charges, and will not accept invoices for payment beyond one year after goods or services have been received.

Accounts Payable is unable to pay for goods and services without a valid purchase order, even if the invoice states a “verbal” commitment from an employee was received. In these cases, CSM will be pleased to accept the product as a donation, unless the supplier makes arrangements to have the merchandise returned at their expense.

#### **REPORTING OF ERRORS, DUPLICATIONS, OVERPAYMENTS**

Any cash application should be applied as indicated on the remittance. We ask your cooperation in immediately informing us any duplicate payments, overpayments, and unclaimed credits that CSM has not utilized, or any cash application problems you may have.

#### **CREDIT APPLICATIONS**

CSM provides complete, pre-printed credit applications for all affiliates that contain sufficient information for establishing an account. CSM will not complete a supplier’s credit application.

#### **CORPORATE RESPONSIBILITY**

##### **GIFTS AND GRATUITIES**

Columbia St. Mary’s asks that all Suppliers refrain from offering gifts or gratuities of any kind to any Hospital Associate.

## CONFIDENTIALITY/ BUSINESS ASSOCIATE AGREEMENTS

Patient medical and financial information, along with any records and data to which you have knowledge and access during the course of work with Columbia St. Mary's, is to be kept confidential. All suppliers that are identified as "Business Associates" under the current HIPPA (Health Insurance Portability and Accountability Act) regulations will be required to enter into a blanket business Associate Agreement with Columbia St. Mary's. It is required that CSM standard Business Associates Agreement be used.

A confidentiality agreement is required to be signed by all suppliers acknowledging that any information concerning the following will not be discussed or divulged to anyone under any circumstances other than to the extent needed to fulfill their work for the hospital. This includes but is not limited to patient identity, condition, care, treatment, or employment of hospital patients, hospital employees or medical staff, including but not limited to patient charts and records, and employee and medical staff records.

The confidentiality of patient and hospital records and contractual commitments shall be maintained. Supplier representatives are not allowed in patient care or restricted areas of CSM facilities without prior approval from the Department Director. Suppliers shall be escorted by department personnel at all times while in a facility.

Conversations and meetings should take place in designated offices, conference rooms, or break rooms away from patients and any public areas.

## CORPORATE INTEGRITY PROGRAM/CODE OF ETHICS

Columbia St. Mary's is committed to conducting its business and operations in accordance with the law and high standards of business ethics. Columbia St. Mary's requires all employees and suppliers to comply with all laws and regulations to which Columbia St. Mary's is subject, including but not

limited to all applicable HIPPA, Medicare, and Medicaid laws and regulations. These include general commercial reasonableness and good faith dealings.

## ETHICAL AND RELIGIOUS DIRECTIVES

Parties acknowledge that Columbia St. Mary's is a member of the Ascension Health System. The operation of Columbia St. Mary's is in accordance with the Ethical and Religious Directives for Catholic Health Care Services ("Ethical and Religious Directives"), and that the principles and beliefs of the Roman Catholic Church is a matter of conscience to Columbia St. Mary's. It is the intent and agreement of the parties that no Agreement or any part thereof shall be construed to require Columbia St. Mary's to violate said Ethical and Religious Directives in its operation. All services conducted by the Supplier must be consistent with the Ethical and Religious Directives as promulgated by the United States Conference of Catholic Bishops, Washington, D.C. of the Roman Catholic Church or its successor.

## BLOODBORNE PATHOGENS

Where potential exposure to blood and body fluids is likely, the supplier's employer is responsible for OSHA bloodborne pathogens training. Suppliers who need additional information on personal protective equipment requirements should contact the charge person of the department. CSM will issue personal protective equipment.

## TUBERCULOSIS (TB)

The supplier is asked to verify that they have had a negative TB skin test. Suppliers will not routinely be permitted to enter isolation, procedure or patient rooms where a suspect or known TB patient is present and unmasked. If a supplier is required to enter such an area to fulfill a contractual obligation, the unit charge person must be notified. The supplier will then be supplied with a positive air-purifying respirator (PAPR) to wear.

## ENDORSEMENTS/ADVERTISING

Recognizing that firms market goods and services, Columbia St. Mary's may serve as a reference, however, Columbia St. Mary's does not endorse goods or services for use in advertising for commercial purposes of any products or services.

## VIOLATION OF POLICY

Suppliers are responsible for the professional behavior of their representatives while in our facilities. The following activities are not permitted:

- Distribution of unsolicited product literature
- Direct involvement or discussion with Columbia St. Mary's patients
- Conducting business in the corridors, cafeteria, gift shop, or public areas without a scheduled appointment
- Misrepresenting yourself, your company, or product to Columbia St. Mary's
- Unprofessional behavior
- Divulging confidential information
- Trespassing in private areas

Representatives will be given a written warning of any violation of policy, with a copy going to the representative's manager. Repeat offenders may be barred from sites for an indefinite period. CSM reserves the right to bar representatives at any time. Unsolicited meetings with line staff (i.e., buyers, purchasing assistants and clinical staff) are prohibited.

The activities of supplier representatives are regulated to assure provision of adequate and accurate information to appropriate individuals, department, service lines or health care professionals while avoiding interference with patient care and value analysis objectives.



The integration of the "A" with the Trinity symbol forever links the two and allows Ascension Health to tell the stories of commitment, compassion, and growth of a healthy community.