Supply Chain Procedure No. 3.2

EFFECTIVE DATE: ***June 1, 2026***

PROCEDURE TITLE:

Supplier Visitation

To be reviewed every three years by:
Executive Vice President, Chief Financial Officer

REVIEW BY: ***July 1, 2029***

PURPOSE

This Procedure implements Supply Chain Policy No. 3, Supplier Policy in part. The purpose of the Supplier Visitation Procedure is to:

- Control & facilitate Supplier representative on-site traffic to assure security and limit access to only those areas required to fulfill the representative's obligations and responsibilities.
- Protect the valuable time of Supply Chain Management (SCM) department and the user departments by eliminating unscheduled and unnecessary on-site visits from Supplier representatives.
- Ensure that Supplier representatives are adhering to Trinity Health system and local infection control and safety policies and procedure requirements.
- Ensure that Supplier representative dress and appearance is professional and appropriate for the job duties being performed and presents a positive image of the organization to colleagues, patients, visitors, and the public.

PROCEDURE

It is the procedure of Trinity Health to require satisfactory identification of Supplier representatives when they visit a Trinity Health facility, including Ministries and affiliated sites, and Trinity Health-owned physician practice offices, both during and outside normal business hours. It is a requirement that all representatives successfully register and satisfy outstanding requirements through Trinity Health's Vendor Credentialing Management System. If the Supplier representative will not be registering for any reason, they are to work with the on-site business owner to make sure all credential and policy requirements are met prior to visiting a Trinity Health facility. If the Supplier is unsure of who the Trinity Health business owner is, then they are to connect with Trinity Health Supply Chain Management to determine next steps. All Supplier representatives must have appointments for visiting any department. All Supplier representatives must have appropriate authorization from the Ministry through the vendor credentialing management program within the Vendor Credentialing Management System. If the Supplier representative is visiting the OR and the site utilizes a scrub kiosk port, then the Supplier must be registered with the scrub port solution and use the scrubs from the kiosk port before entering the OR. In all cases, Supplier representatives must wear a properly issued guest badge from the visitor and Vendor Credentialing Management System identified by the Ministry.

GENERAL

1. All Supplier representatives are required to schedule an appointment during the normal business hours of the facility they wish to visit in advance by contacting their Trinity Health contact, or if available at the facility, by using the Vendor Credentialing Management System for scheduling. Exceptions to the schedule must be approved by Supply Chain Management or the affected department manager. Unannounced visits and/or solicitation are not permitted.

2. At the time of the appointment, the Supplier representative shall report to the front security/receptionist desk for check in, according to Ministry procedure, and must sign in stating the purpose of the visit, who the appointment is with, and the time and date of the appointment.

    A. For visitations at facilities without a security/receptionist desk on-site, Supplier representatives must report to the specific department in which they have a scheduled appointment.

    B. The Supplier representative is required to sign-in to the Vendor Credentialing Management System upon arrival to the designated kiosk. For locations that do not have kiosks, Supplier representatives must sign-in remotely to the Vendor Management System via the remote sign-in function on the mobile device.

3. No solicitation of any product(s) or service(s) shall occur by Supplier representative without prior approval of the product(s) or service(s) by Supply Chain Management.

4. All Supplier representatives must follow Trinity Health's Supplier Code of Conduct and comply with Trinity Health and Ministry policies and procedures.

5. Supplier representatives are not allowed to alter, remove, destroy, view, print, access, photocopy, discuss or disclose in any manner confidential applicant, patient, Employee, and/or Trinity Health information. Supplier representatives must always respect the confidentiality of Trinity Heath Confidential Information.

6. Contracted Supplier representatives may be issued a badge(s) by the authorized department for the duration of the contract with confirmation from the department administering the contract (i.e., elevator maintenance, construction contractors, pest control, window washers, etc.).

7. Supply Chain Management shall be the sole authorized agent for Trinity Health for the solicitation of product or service pricing from Suppliers.

8. Supplier representatives are prohibited from access to Patient Care Areas unless accompanied by Ministry personnel and approved by Ministry Supply Chain and administration, and must adhere to the following conditions:

    A. Supplier representatives cannot offer medical opinions or services.

    B. Supplier representatives cannot have a role in the diagnosis and/or treatment of patients.

    C. The patient must be informed and give consent for Supplier representatives to be in their Patient Care Area.

    D. Ministry administration must approve all admissions of Supplier representatives into the OR and procedural areas. Therefore, it is at the discretion of the assigned Ministry Vendor Credentialing Management Administrator to determine and confirm if Supplier representatives are qualified to be in the operating room and procedural areas.

    E. Supplier representatives cannot touch or operate equipment in use for patient care unless covered under the terms and conditions of the contract and approved by Ministry administration.

    F. Supplier representatives cannot participate in a surgical procedure in any manner and can only take an observatory or non-direct procedural support role unless covered under the terms and conditions of the contract and approved by Ministry administration.

    G. Supplier representatives must comply with infection control policies and procedures at all times. Supplier representatives who enter Patient Care Areas must provide the Ministry/clinic proof of communicable disease screening by being compliant in the Vendor Credentialing Management System, or in approved instances, providing sufficient documentation to the appropriate Ministry administration.

9. Supplier representatives may not page or call physicians, including residents, or Ministry personnel. Supplier representatives may only contact Ministry personnel through Supply Chain Management.

10. Supplier representatives must follow all guidelines and comply with all instructions received from the Vendor Credentialing Management System.

11. Supplier representatives are to maintain appropriate dress, hygiene, and neatness of appearance. Supplier representatives must wear approved scrubs or attire in compliance with Ministry employee dress code.

12. Supplier representatives must check in and out of the Vendor Credentialing Management System at every visit to the facility.

ACCESSING NON-ACUTE FACILITIES

All vendor representatives visiting Trinity Health System Office or another non-hospital facility must conduct business in a professional manner and comply with all site-specific policies and procedures. Upon arrival, vendor representatives are required to check in with Security at the facility entrance, present valid identification if requested, and follow any visitor registration requirements before accessing the premises. If Security is not present or available at the location, vendor representatives must check in with front desk staff and/or the Trinity Health representative they are scheduled to meet with prior to conducting business onsite. Vendors must remain in approved areas, be escorted when required, adhere to all safety, security, and confidentiality expectations, and coordinate visits with their designated company contact. Failure to comply with facility access requirements may result in denial or revocation of site access.

SAMPLES

1. Samples will only be left with Supply Chain Management for follow-up with the departments and physicians.

2. It is unlawful to charge patients for samples received by Trinity Health.

3. Prescription and non-prescription drug samples are prohibited unless approved by the pharmacy clinical leadership.

CONTACTING PRIVATE PHYSICIANS

1. All supplier representative visits to provider or care team members at a Trinity Health Medical Group office location should be consistent with System Office and senior Health Ministry leadership vendor policy.

2. If a provider or care team agrees to see the supplier representative at a Trinity Health site, the office must notify Supply Chain Management that the appointment has been made. The supplier must follow established vendor policies.

3. No solicitation of any products(s) or services(s) shall occur by supplier representative without prior approval of the products(s) or service(s) by Supply Chain Management.

4. Supply Chain Management shall be the sole authorized agent for Trinity Health for the solicitation of product or service pricing from suppliers.

5. Samples will only be left with Supply Chain Management for follow-up with the departments and physicians.

OTHER

1. Law enforcement officials, court representatives, and attorneys acting in their official capacity must be referred to the authorized department identified at the Ministry before entering the facility.

2. General facility tours are prohibited, unless approved by Ministry administration.

3. Any Supplier representative not adhering to the standards of conduct outlined in this Procedure will be escorted out of the facility by the security department which may result in suspension of access, cancellation of business with the Ministry, as well as a loss of privileges at all Trinity Health facilities.

SCOPE/APPLICABILITY

This Procedure is intended to apply to everyone within Supply Chain Management as well as anyone at Trinity Health, its Ministries and Subsidiaries who interact with Suppliers.

This Procedure applies to everyone within the SC-FAM organization as well as throughout Trinity Health. All who engage with Suppliers, and their representatives, will be held accountable to these standards of conduct.

DEFINITIONS

Clinic Management means Trinity Health Employee manager at outpatient physician office and/or clinic that holds responsibility for managing vendor representatives at their clinic.

Confidential Information means all non-public information relating to Trinity Health or its Ministries including but not limited to business, operational, financial, technical, employee, patient, customer, supplier, and strategic information as well as any information regarding Trinity Health's or its Ministries' facilities, equipment, security measures, or operations that a Supplier may access or observe while performing services or on Trinity Health's or a Ministry's premises.

Employee means an employee of Trinity Health or one of its Ministries or Subsidiaries, whether that individual's status is permanent or temporary, contingent, part- or full-time. Trinity Health often uses the term "colleague" to refer to its Employees. In HR policies, "Employee" is used instead of "colleague" to be clear that HR policies apply to individuals in an employment relationship with Trinity Health or one of its Ministries or Subsidiaries. The form of the Policy does not change an Employee's Primary Employer, defined as the payroll company of record, and does not create a joint employment relationship with any entity.

Ministry (sometimes referred to as Health Ministry) means a first tier (direct) subsidiary, affiliate, or operating division of Trinity Health that maintains a governing body that has day-to-day management oversight of a designated portion of Trinity Health System operations. A Ministry may be based on a geographic market or dedication to a service line or business. Ministries include Mission Health Ministries, National Health Ministries, and Regional Health Ministries.

Patient Care Areas means areas where patients are assessed, treated, and/or monitored by colleagues. This includes inpatient nursing units, the Emergency Department, Endoscopy, Interventional Cardiology areas, Radiology, Respiratory/Pulmonary areas, all surgical areas, physician practice offices and all other areas that meet the definition.

Policy means a statement of high-level direction on matters of importance to Trinity Health, its Ministries and Subsidiaries or a statement that further interprets Trinity Health's, its Ministries' and Subsidiaries' governing documents. Policies may be either stand alone, systemwide or mirror policies designated by the approving body.

Primary Employer means the payroll employer of record for the Employee. The Primary Employer should be the entity at which the Employee has the greater FTE. If the Employee has an equal FTE at both entities, then the entity at which the employee has more tenure is the Primary Employer.

Procedure means a document designed to implement a policy or a description of specific required actions or processes.

SC-FAM means Supply Chain and Fixed Asset Management.

Subsidiary means a legal entity in which a Trinity Health Ministry is the sole corporate member or sole shareholder.

Supplier and **Vendor** mean any entity that provides products or services in exchange for compensation.

Supply Chain Management (SCM) means the Trinity Health Employees and function that oversee how facilities purchase, deliver, store, distribute, and use products and services at the lowest cost to serve.

Vendor Credentialing Management Administrator means local Ministry Supply Chain Management and/or clinical representative that has been assigned by the site to manage vendor credentialing.

Vendor Credentialing Management System means a centralized software platform and system used by Trinity Health to manage security, safety and compliance for Vendor representatives or contractors.

RESPONSIBLE DEPARTMENT

Further guidance concerning this Procedure may be obtained from Strategic Sourcing.

RELATED PROCEDURES AND OTHER MATERIALS

- Supply Chain Policy No. 3 - Supplier

APPROVALS

Initial Approval: October 6, 2017

Subsequent Review/Revision(s): December 2, 2025