

Required Documentation Checklist for Sales Representatives

The following table represents a summary of documentation and competencies that are required for specific groups of vendor representatives.

	Level 1 (non-clinical)	Level 2 (clinical)	Level 3 (clinical)
Health Status or Immunizations			
MMR (Mumps, Rubella, Rubeola)		X	X
History of Chickenpox (Varicella)		X	X
Influenza (not required)		X	X
TB Skin Test (Chest X-Ray if positive)		X	X
Hepatitis B (not required)			X
Education/Training			
Competency Assessment on Product Knowledge		X	X
Pre-Employment Screening of Criminal Background Check		X	X
Bloodborne Pathogens		X	X
HIPAA, Patient Privacy, Patient Rights		X	X
OR Protocol			X
Liability Insurance	X	X	X
Photograph (Recent Head Shot) for Badge	X	X	X
EMMC Policy for Sales Representatives	X	X	X
http://www.emhs.org/resources/vendors.aspx#	X	X	X
EMMC Life Safety Checklist	X	X	X
Requirement for Vendors of Medical Equipment Maintenance Services	X		
Required Documentation Checklist for Vendor Reps	X	X	X

Level 1 (non-clinical) – Representatives who do not visit any patient care area and whose business is restricted to administrative offices. Absolutely no patient interaction. (e.g., Pharmacy Reps, equipment repair technicians, etc.).

Level 2 (clinical) - These Representatives may visit any patient care area *except* operating rooms, heart catheterization labs, or angiography rooms. They may provide technical assistance, operate medical equipment, and observe or attend procedures with patients. Their role requires

them to often work in patient care areas, and/or provide assistance to or consult with patient care staff.

Level 3 (clinical) – Representatives that primarily serve in clinical support roles. These Representatives often visit any patient care area including operating rooms, heart catheterization labs, or angiography rooms. They provide technical assistance, operate medical equipment, and observe or attend procedures with patients. Their role requires them to often work in patient care areas, and/or provide assistance to or consult with patient care staff (e.g., Device Reps).