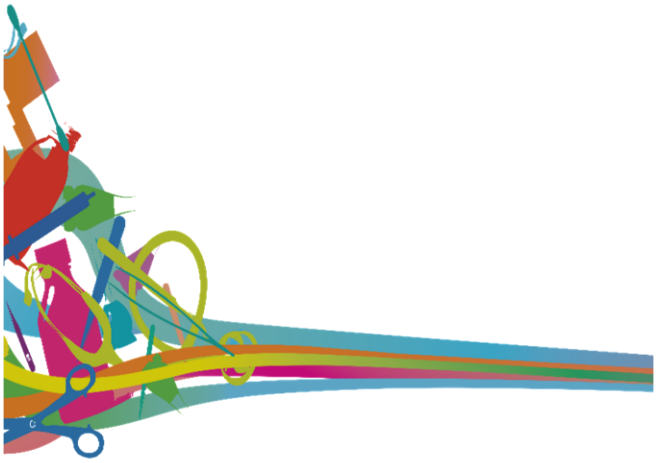
Supplier Representative Policy



SmartTogether Procurement

Serving Guy's & St Thomas' NHS Foundation Trust, Lewisham and Greenwich NHS Trust, Great Ormond Street Hospital for Children NHS Foundation Trust, Oxleas NHS Foundation Trust
South London and Maudsley NHS Foundation Trust

Document Detail	
Version	V1
Approving body	Procurement and Supply Chain Senior Leadership Team
Stakeholder Group	Smart Together Shared Service
Owner	Clinical Sourcing Team
Responsible Lead	Chief Procurement Officer
Effective from	October 2024
Date last reviewed	October 2024
Date of next review	November 2025
Related documents	Procedures, guidance and forms which support the policy
Keywords	**Smart Together:** Shared procurement service hosted by Guy's and St Thomas' NHS Foundation Trust. **Trust(s):** Partner organisations under the Smart Together shared service: • Guy's & St Thomas' NHS Foundation Trust • Lewisham & Greenwich NHS Trust • Great Ormond Street Hospital for Children NHS Foundation Trust • South London and Maudsley NHS Foundation Trust • Oxleas NHS Foundation Trust **Supplier Representatives:** External individuals or companies providing, or with the potential to provide, goods, services, or equipment to Smart Together member Trusts. This also includes representatives attending hospital sites to support clinical teams during specific cases **Procurement and Supply Chain Staff:** Internal teams responsible for sourcing, negotiating, and managing supplier relationships. **Clinical and Non-Clinical Staff:** Hospital staff who interact with suppliers for product demonstrations, trials, or service evaluations. **Senior Management:** Those overseeing procurement strategies and ensuring policy compliance. **Medical Industry Accredited (MIA) system:** System managing access of commercial visitors to all sites, especially within restricted or patient-sensitive clinical areas. **Conflict of Interests:** Situations where personal interests could conflict with professional duties, which must be disclosed and avoided.

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1. Summary

1.1. This policy defines the expectations and responsibilities for supplier representatives engaging with the Trusts served by the Smart Together Procurement Shared Service.

1.2. This policy also outlines the obligations of the Smart Together Trusts, aiming to ensure that all interactions are conducted with the highest levels of professionalism and integrity. By promoting ethical behaviour and aligning with the values and standards of the Trusts, this policy fosters transparent, respectful, and compliant relationships between suppliers and the Smart Together Trusts. The policy does not apply to procurement functions managed outside Smart Together, such as by Essentia, DT&I, or Estates at Great Ormond Street Hospital for Children and Oxleas NHS Foundation Trust, which have their own guidelines.

2. Introduction

2.1. This policy is crucial for maintaining ethical conduct, ensuring compliance with regulations, and safeguarding patient safety. It establishes clear guidelines for supplier interactions to control access to sensitive areas, minimise disruptions to clinical care, and ensure that only approved, safe products are introduced. Additionally, it helps manage costs by standardising procurement processes and promoting competitive practices, ultimately safeguarding the hospital's integrity and operational efficiency.

3. Purpose

3.1. The purpose of this policy is to define the expectations and responsibilities for interactions between supplier representatives and the Smart Together Trusts. This policy aims to ensure that all interactions are conducted professionally, ethically, and in accordance with Trust standards and values.

4. Objectives

4.1. The objectives of this policy are to:

- ensure that supplier representatives understand and adhere to the standards and expectations of the Smart Together Trusts
- promote ethical and professional conduct in all interactions with Smart Together Trusts
- control access to sensitive areas within the hospitals
- minimise disruption to clinical care
- protect the confidentiality and integrity of information shared between suppliers and the Smart Together Trusts
- foster a collaborative and respectful working relationship between supplier representatives and the Smart Together Trusts
- manage costs and efficiencies
- promote fair competition and ensure compliance with all relevant laws, regulations, and organisational policies

5. Scope

5.1. This policy applies to:

- **Supplier Representatives** – Any external individuals or companies providing, or with the potential to provide goods, services, or equipment to Smart Together Trusts, including but not limited to sales representatives, account managers, technical support personnel, those supporting clinical cases, and manufacturers. This ensures that all relevant external parties are covered, even if they are not direct suppliers.

- **Procurement and Supply Chain Staff** – Internal teams responsible for sourcing, negotiating, and managing supplier relationships.

- **Clinical and Non-Clinical Staff** – Hospital staff who interact with suppliers for product demonstrations, trials, or service evaluations.

- **Senior Management** – Those overseeing procurement strategies and ensuring policy compliance.

- **Contractors and Consultants** – Other external parties involved in procurement or supply chain activities.

6. Accreditation and Credentialing

6.1. The Smart Together Trusts use the Medical Industry Accredited (MIA) system to manage access for visitors to all sites, particularly within restricted or patient sensitive clinical areas such as hospital theatres. This ensures that only qualified and credentialed representatives visit patient-sensitive areas.

6.2. **Differentiation Between Representatives:**

- **Sales Representatives**: These individuals primarily engage with the Trust for business development, product promotion, and procurement-related discussions.

- **Clinical Representatives**: These are supplier representatives attending hospital sites to provide technical support to clinical teams during specific cases (e.g. product demonstrations or technical support in surgeries). They must have the necessary clinical training and credentials to assist in patient care settings. Visits must also be pre-arranged, following appropriate MIA

7. Responsibilities

7.1. **Supplier Representatives:**

- must adhere to all relevant laws, regulations, and Smart Together Trusts' policies.

- must pre-book **all** visits to any of the member Trusts through the MIA system and register their visit at least 24 hours in advance.

- must check-in on arrival at any of the sites, and prior to gaining access to the department e.g. theatres

- must inform the General Manager (GM) upon arrival on site. This ensures proper coordination and oversight during their visit

- must wear visible identification badges at all times

- must adhere to access restrictions, particularly in sensitive clinical or stock areas.
  - They are strictly prohibited from accessing Omnicell cabinets or any other stock areas without prior approval from clinical staff or the Procurement department.
  - They are only permitted access to their own stock. Any handling of other stock must be authorised by the relevant department.

- must maintain integrity, professionalism, respect and ensure compliance with the MIA system and Trust policies

- must maintain confidentiality of all proprietary and sensitive information

- must ensure that all communications and interactions are transparent and honest

- should promptly address any issues or concerns raised by the Smart Together Trusts.

7.2. **Smart Together Procurement Team:**

- will provide clear and concise information regarding requirements and expectations to suppliers and stakeholders

- will monitor compliance with the policy, ensuring all supplier interactions adhere to the outlined guidelines

- will address any issues of non-compliance by suppliers or internal staff promptly

- will facilitate training on the policy for internal teams, particularly those frequently engaging with suppliers

- will treat supplier representatives with respect and professionalism

- will ensure that any feedback or concerns from supplier representatives are addressed in a timely manner.

7.3. **Departmental Heads/Managers:**

- will ensure their teams are aware of and adhere to the Supplier Representative Policy when engaging with suppliers

- will approve and supervise supplier visits to ensure they align with the policy's requirements
- will maintain transparent records of supplier interactions within their departments.

7.4. **Clinical and Operational Teams:**

- will follow the procedures outlined in the policy when engaging with suppliers, including maintaining professionalism and upholding ethical standards
- will report any supplier issues or concerns to the procurement team
- will ensure that any product trials or demonstrations adhere to the policy's guidelines and obtain proper approvals.

7.5. **Conflict of Interests**

7.5.1. Supplier representatives must disclose any potential conflicts of interest.

7.5.2. Stakeholders or Trust members must disclose any potential conflicts of interest.

7.5.3. Representatives must avoid situations where personal interests could conflict with their professional duties.

7.5.4. Any conflicts of interest must be reported immediately to the Smart Together procurement team.

8. Code of Conduct

8.1. **Supplier representatives are expected to:**

- act in the best interest of both their organisation and the Smart Together Trusts
- avoid putting any Trust Employee in a situation where they need to declare a conflict of interest
- refrain from offering inducements or inappropriate gifts to Trust staff
- respect the diversity and inclusivity values of the Smart Together Trusts.

9. New Product Requests

9.1. Requests for new products must follow the Trust's established procurement procedures, ensuring that all proposed items meet rigorous standards for quality, safety, and cost-effectiveness.

9.2. Any request for a new product must be submitted through the appropriate departmental lead, accompanied by a comprehensive justification. This should detail the clinical benefits, cost comparison against existing products, and any potential impact on patient care or operational efficiency.

9.3. All new product requests will undergo a formal review process, which may involve product trials, evaluations by relevant clinical and operational teams, and alignment with the Trust's strategic and budgetary objectives. This structured review ensures that any new products introduced are not only fit for purpose but also sustainable

within the Trust's financial and safety frameworks. See Appendix 3 for the New Product Request Form Template.

10. Samples and Product Evaluations

10.1. Supplier representatives may sometimes be required to provide product samples for evaluation.

10.2. Suppliers must not provide samples of products without prior request and approval from the Procurement department.

10.3. All samples must be clearly labelled and accompanied by relevant documentation.

10.4. The Smart Together team will evaluate the samples and provide feedback within a specified timeframe.

10.5. Suppliers must collect or dispose of samples as agreed and in a timely manner. Uncollected items within the agreed timeframe may be destroyed without further notice.

11. Contractors

11.1. Supplier representatives working as contractors must adhere to all site-specific safety and operational guidelines.

11.2. Contractors must ensure that their work does not disrupt the normal operations of the Smart Together Trusts.

11.3. Any incidents or accidents must be reported immediately to the Smart Together procurement team.

12. Infection Prevention and Control (IPC) Guidelines

12.1. Supplier representatives must comply with all IPC guidelines to prevent the spread of infections. http://gti/clinical/directorates/grida/directorate-services/infection/infection_prevention_control/infectioncontrol.aspx [insert Trust specific page]

12.2. Representatives must ensure that any products or equipment provided meet IPC standards.

12.3. Any breaches of IPC guidelines must be reported immediately to the Smart Together Trusts.

13. Commercial Sponsorship

13.1. Any commercial sponsorship arrangements must be transparent, agreed in writing and aligned with Trust policies. Copies of all arrangements must be forwarded to the Smart Together Contracts Team: SmartTogContractTeam@gstt.nhs.uk

13.2. Sponsorship must not influence the procurement decision-making process of the Smart Together shared service or clinical judgements.

13.3. All sponsorship activities must comply with relevant laws and regulations.

14. Confidentiality

14.1. **Supplier representatives must:**

- protect the confidentiality of all information shared by the Smart Together Trusts
- not disclose any proprietary information to unauthorised parties
- ensure that any data shared is used solely for the purpose intended and in compliance with data protection regulations.

15. Monitoring Compliance of Policy

15.1. This document will be reviewed every three years, or as required by regulatory or organisational changes.

15.2. This document may be amended as necessary to ensure its continued relevance and effectiveness.

15.3. Responsibility for reviewing this document will lie with the Smart Together Procurement department.

15.4. Compliance with the policy will be monitored through regular audits and the MIA system.

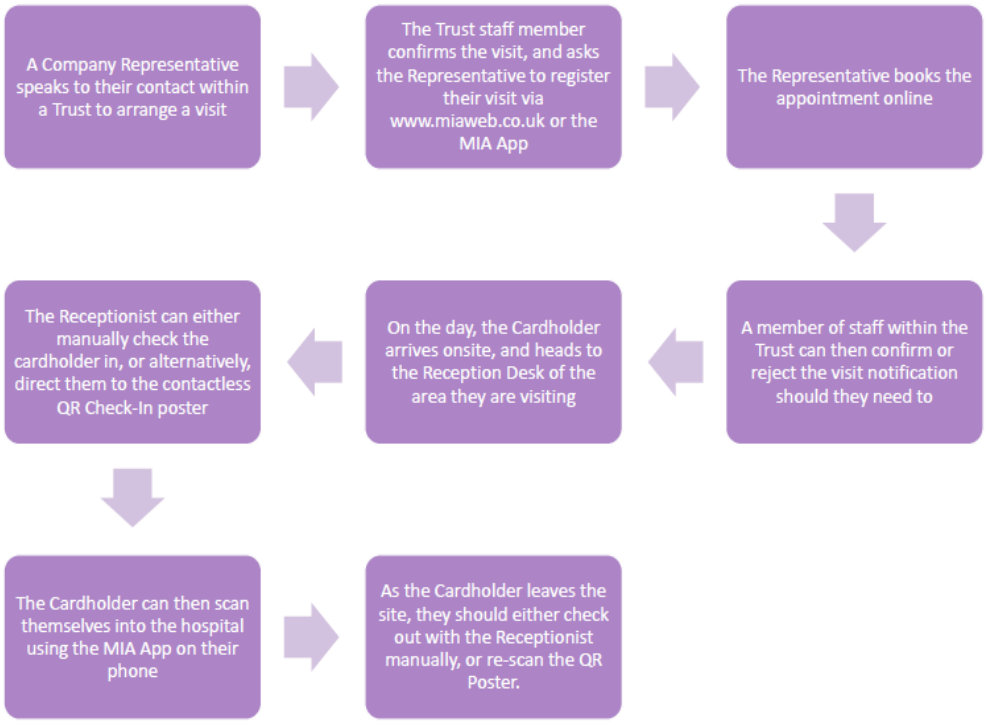
Appendix 1 - Supplier Visit Process and Prohibited Activities

1. **Pre-booking**: All visits must be registered through MIA at least 24 hours in advance. This applies to both sales representatives and clinical representatives.
2. **On-Site Check-in**: Upon arrival, all supplier representatives must check in at the designated area. Clinical representatives attending cases must receive appropriate clinical team approval.
3. **Identification**: Suppliers must wear visible badges at all times, distinguishing between sales representatives and those attending for clinical support.
4. **Prohibition on Removing Stock**: Suppliers are strictly prohibited from removing stock from shelves or any storage areas. Any stock handling must be pre-authorised by the relevant department.
5. **Unauthorised Stock**: Any unauthorised stock dropped off by suppliers will go straight into quarantine, clearly marked as ‘Not for Use.’ If the supplier fails to collect the stock within 28 days, it will be destroyed at no cost to the Trust.

Consequences:

6. Failure to follow these procedures will result in immediate consequences.
7. Failure to register on MIA prior to a visit will result in the supplier representative being denied access.
8. Non-compliance with this policy will result in warnings, suspension, or a permanent ban from site visits. Serious breaches, such as removing stock without authorisation, will result in immediate action and potential exclusion from further Trust business.

Appendix 2 – MIA QR Check-in Process



Appendix 3 – New Product Request Form Template

E-Procurement Form - New or Replacement Product

Before Completing this form, please check that the product is not already availlable via [e-procurement]*.
If you have purchased this product before, please contact procurement who may help you find the product.

When completed this form must be submitted ELECTRONICALLY to SMART TOGETHER at
**(insert procurement email address)*

******* DO NOT CHANGE THE FORMAT OF THE FORM *******

Name of staff member completing request:
Job Title/Role:
Directorate:
Cost Centre:
Budget holder Name:
Phone:
Email:
Speciality:
Date of Request:
Budget holder Email:
Products Approved By Budget Holder?

Type of Product/Service?
Part of Existing Range?

Please note - there should be only one form per supplier - all products should relate to the same reason for requirement
Supplier of Proposed Product(s):

Please ensure the below is completed fully for timely turnaround, all product fields are mandatory, and incomplete forms will be returned for full completion.

	Supplier's Product code	Product Name	Description and Clinical Rationale*	E-Class Code (4 letters) Click Here	Price (Exc VAT)	Unit of purchase (e.g. box of 10)	Initial Quantity required	Expected annual usage (estimate if necessary)	4 Digit Account Code
1.									
2.									
3.									
4.									
5.									
6.									
7.									
8.									
9.									
10.									

***Clinical Rationale:**
In completing the clinical rationale, please include details such as:
- Does the need arise due to individual clinical preference?
- Which product is this replacing and why?
- If this is a new product then how has the requirement arisen?
- What areas will use the product?
- What are the risks to patients if this product is not used?
- Will any other teams require consultation & communication?
- Any other supporting information.

Quote Reference:
Quote Date:

Product History (Product new in the UK/EU; Other organisations that using the product; Why this product verses other options; Staff training required; Delivery charges; Is the orignal product used in other areas within the trust)

To your knowledge, is the product being used within other SmartTogether Trusts?
Are there other options available in the market?
Will this require new surgical techniques or other?
Is the product CE Marked?
Will this product be required in an Omnicell?
Is there any conflict of interest?
Have any Gifts, Hospitality or Sponsorship been received and declared?
Total annual spend on previous product? (Data available from Procurement)

Is there a need to trial this product?
Have these alternatives been considered?
If yes, what techiques will be required and has the impacts been considered?
If yes, have the Procurement and Supply Chain confirmed there is space available in Omnicells?
Are there any ethical issues identified?
If yes, provide details
Impact on Budget (Saving/Cost pressure?):

All new/replacement medical & surgical products, which are not part of an existing range, must be approved by your General Manager (GM). Please submit form to your GM for approval before emailing through to **(insert procurement email address)*

Budget Holder Sign off — I can confirm that there is a requirement for the aforementioned product and there is funding available.

Name:
Job title:
Signature:
Date:

Once approved by your GM, all new/replacement products require further approval by the **(Please select the relevant group below and insert)* before being progressed.
Please liaise with Procurement.

**GOSH: Medical Equipment Supplies Group (MESG); LGT: Product Standardisation Panel (PSP); GSTT: Product Review Group (PRG)*