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GHX Vendormate
Credentialing Guide for Suppliers

Need help simplifying the credentialing process? Discover GHX trusted practices that have served thousands of organizations and industry reps for more than 18 years.

Introduction

National, state and local compliance regulations require healthcare organizations to screen and track both vendors and track both vendors and their representatives (reps) with whom they do business. All vendors and reps that hospitals do business with should be credentialed, whether they are entering patient care facilities to assist in creating the safest environment possible for the hospital's patients, employees, and visitors.

Who should be credentialed? When thinking about individuals that should be credentialed, essentially anyone not employed by the hospital or health system representing an outside organization. In this guide we refer to these people as "reps" or "healthcare industry representatives". Some obvious roles are people that promote products on behalf of pharmaceutical or medical supplies/equipment companies. More, not so obvious positions include service technicians, retail vendors, orthotics and prosthesis reps, IT consultants and remote access contractors.

Without a national credentialing standard, requirements can vary broadly between health systems and even from facility to facility within a single system. As health systems and hospitals continuously update their credentialing and facility access policies and procedures, the selling environment for medical equipment, medication and supplies grows more challenging. And with no standard credentialing database, vendors and their reps must navigate the complex web of various solutions providers, their user interfaces, and processes.

"The effect of the pandemic is going to linger throughout the industry. Many life sciences reps have been shut out from hospitals and physician offices or have seen physician preferences change from face-to-face to hybrid or virtual only. They are faced with the ongoing challenge of not being able to build the same rapport as they had previously. The situation is likely to improve in 2023, but it will not go away completely."[1]

You need fast, efficient access to your customers, but at the same time, need to comply with their policies and procedures. With increased competition for hospitals' limited capital equipment, supply and service budgets, no one wants to miss an appointment or lose a potential sale because of noncompliance with a facility's credentialing policy.

Here we outline guidance for establishing and maintaining a centralized, streamlined, and effective credentialing process based on our 18+ years of experience. We've seen these practices help organizations and their reps build trust as business partners by showing commitment to support credentialing compliance goals for their customers.

[1] 3 Key Challenges for Life Sciences Industry Reps in 2023, CMR Institute, https://www.cmrinstitute.org/3-key-challenges-for-life-sciences-industry-reps-in-2023/

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About GHX

Building on decades of collaboration among providers, manufacturers, distributors and other industry stakeholders, Global Healthcare Exchange, LLC (GHX) is leading the charge in helping organizations run the new business of healthcare. By automating key business processes and translating evidence-based analytics and data into meaningful action, GHX is helping the healthcare ecosystem to move faster, operate more intelligently, and achieve greater outcomes. With the support of GHX, healthcare organizations have removed billions of dollars of wasteful healthcare spend. For more information on GHX's suite of cloud-based supply chain solutions, visit www.ghx.com and The Healthcare Hub.

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Common Credentialing Requirements

A vendor's primary focus is to provide products or services that meet the needs of its customers and their patients, along with ongoing support to help ensure their offerings are implemented and used effectively and safely. The credentialing process can be immensely complex and time-consuming, taking focus away from selling and support.

Each health system chooses its own credentialing solution and develops its own processes and vendor/rep policies. Requirements change based on shifting regulations or the needs of each individual organization. Adding to the complexity, facilities within the same health system might have different credentialing criteria and technology.
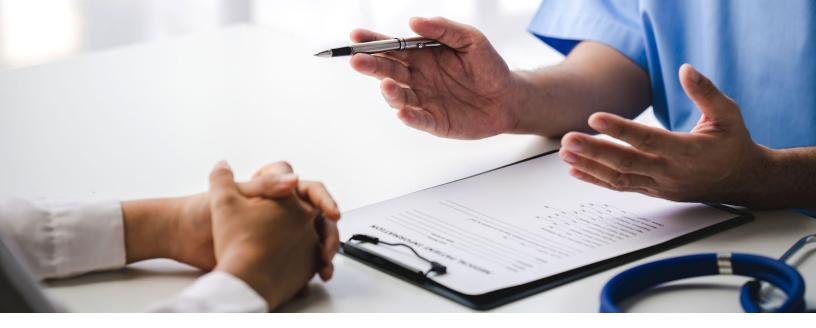
A rep visiting multiple customers in one day will likely find themselves logging into and out of various credentialing apps, trying to confirm whether they are up to date on each customer's requirements.

> You are flying across the U.S. for work, visiting multiple cities on your trip. But you discover that each airport's security checkpoint requires a different form of ID – a passport is required at one airport, a social security card is mandatory at the next, etc. What happens if you don't have all the different documents you need to reach all your work destinations?
>
> For many healthcare industry representatives and the providers they serve, current vendor credentialing requirements pose almost this exact same challenge.
>
> **Journal of Healthcare Contracting**[2]

[2]Credentialing Consortium Becomes Dynamic Change Agent, Journal of Healthcare Contracting, September 2021,
 https://www.jhconline.com/credentialing-consortium-becomes-dynamic-change-agent.html

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A healthcare organization's verification of proper credentials may include, but is not limited to:

	Individual Rep	Company
Compliance information	• Federal/state sanctions • Immunizations	• Federal/state sanctions • Tax ID (FEIN) • Taxpayer identification number (W9) • Certificate of liability • Insurance
Policy acknowledgment and training	• Policy acknowledgment and training • Gifts/gratuity • Conflicts of interest • Parking • Safety • Bloodborne pathogens • HIPAA	

Demonstrating compliance with credentialing requirements to your customers has benefits and that may help set you apart from competitors. Trust is a crucial element in building strong customer relationships, and your customers trust you with their facilities, their patients, staff, and visitors along with sensitive data. Making sure you're properly credentialed can help you earn that trust.

Compliance with hospital immunization requirements and providing up to date policy acknowledgements can help minimize health and safety risks for everyone accessing the facility.

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Examples of Common Credentialing Requirements

Immunizations and tests (if mandated)

- COVID-19
- Tuberculosis (TB, PPD) skin test
- Influenza (seasonal)
- Hepatitis B vaccination
- MMR (measles mumps, rubella) vaccination
- Varicella (Chicken Pox) vaccination or proof of having had Varicella
- Pertussis

Training

- HIPAA training
- Bloodborne pathogen training
- Aseptic technique training
- Radiation Safety
- Product and service training

Company information

- Proof of background check
- Proof of liability and product insurance

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A Guide to Support Credentialing Success

With different rules, requirements and deadlines for credentialing documentation, there are a lot of details for vendors to juggle, especially when managing reps across multiple states or health systems.

The credentialing process poses several challenges for those who manage it, including manual tasks such as uploading, storing and organizing documents, and providing access to reps as they need them (e.g., emailing documents as attachments).

These tasks demand a significant amount of time and effort. As AdvaMed's vice president, assistant general counsel, and director of legal & medical affairs Terry Chang stated in a recent blog post, "The redundancy and associated billion-plus a year and growing costs consume limited health care resources without adding comparable value."[3]

> "Supplier representatives may be subjected to equal or sometimes greater scrutiny than healthcare provider employees, even though supplier representatives have minimal to no direct contact with patients."
>
> **American National Standards Institute[4]**

Companies are dedicating more resources to credentialing to support sales revenue goals. However, despite this increased investment, the dynamic nature of credentialing necessitates the adoption of efficient strategies.

This guide can help you to establish, implement and maintain an effective and efficient credentialing process that can help alleviate administrative burden, streamline credentialing compliance requirements, and unite a vendor and its reps in meeting customer needs.

[3]Executive Director Blog: Terry Chang of AdvaMed and His Advocacy for Standardized Healthcare Vendor Credentialing, Consortium for Universal Healthcare Credentialing, (C4UHC), February 2023, https://c4uhc.org/executive-director-blog-terry-chang-of-advamed-and-his-advocacy-for-standard-ized-healthcare-vendor-credentialing/

[4]American National Standard for Supplier Credentialing in Healthcare, ANSI, October 2020, https://c4uhc.org/wp-content/uploads/2021/05/C4UHC-P1.4-RESOURCES-4.1-GUIDANCE-1.-ANSI-NEMA-SC-1-2020-Forward-Scope-Only-2021-04-15-JD-FINAL-Post-as-PDF.pdf

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Develop a **Centralized Credentialing Process**

Vendor credentialing is a necessary part of doing business, but the responsibility often falls onto the healthcare industry representatives who needs to focus on sales or relationship building or is "tacked-on" to an existing administrative staff member. The challenge in either of these scenarios is that credentialing doesn't always receive the attention needed.

Where reps are responsible for managing their own credentialing compliance, their employer lacks visibility into this activity, running the risk that critical steps, such as providing updated documentation to hospitals, fall through the cracks.

A more effective approach is to assign a single point of contact for credentialing in your organization and clearly define their role and responsibilities as your credentialing administrator. Then work to define and build a structure to centralize the credentialing process. Key steps include:

» Establishing policies and procedures

» Developing a detailed roadmap and timeline for implementation

» Integrating credential management software and tools

» Standardizing the process across departments

» Evaluating and refining the credentialing process

To maintain continuity of your credentialing compliance program, don't silo as a function. Rather, ensure the details around your strategy and processes are known and understood among the necessary stakeholders, most notably your commercial teams and human resources (HR) teams. Change and staff turnover is inevitable in any organization, so share knowledge of credentialing beyond a single administrator to avoid disruption and the risk for credentialing compliance gaps.

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Document management

A centralized document repository where your credentialing administrator can monitor, manage and track all healthcare facility required compliance documents is essential. Implement standardized workflows and automated alerts for when documents are set to expire. This will help your administrator to be proactive in identifying potential credentialing compliance gaps due to lapsed documentation.

Making this repository accessible to cross-functional teams (e.g., sales, HR), can help streamline the process and minimize the need to download and send documents to team members as needed.

Benefits of centralization

Overall, a centralized, standardized and automated approach to credentialing compliance helps to improve efficiency, reduce risk, and enhance a vendor's and its reps' ability to meet customer requirements.

6 Tips for Successful Credentialing

Here are some tips and resources for reps to help them get and stay credentialed.

1 **Register at necessary Vendor Credentialing Organizations (VCOs) in your territory**

Visit Hospital Vendor Credentialing to determine the VCOs that require your registration.

2 **Complete all required training**

Including but not limited to HIPAA, bloodborne pathogens and aseptic principle trainings.

3 **Get required vaccinations**

Once you have registered at all Vendor Credentialing Organizations (VCOs) and linked your accounts, you will have your list of required vaccinations. Ensure that you provide the appropriate documentation.

4 **Review and acknowledge policies at all registered VCOs**

Along with the training and vaccinations, facilities may have specific forms or documents that you'll need to fill out or acknowledge.

5 **Submit all documentation to the VCOs**

Ensure that you have met all requirements for a particular health system and submitted the necessary documentation to the VCO.

6 **Review that you are "cleared" for your facilities**

Once you have submitted your documentation, follow up and make sure that you are cleared! Log into your accounts and make sure you have met all your requirements. Keep in mind that facilities periodically change their credentialing requirements, so ensure that you check your status before visiting a facility.

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Creating a Culture of
Compliance and Excellence

Because credentialing is a priority for your customers, you should make it a priority for your company and reps. The credentialing program should be centrally run and recognized as a corporate function. The most successful programs are endorsed by senior management. This helps ensure buy-in and accountability throughout the organization and communicates agreement on the value of credentialing.

Incorporate credentialing into your onboarding process

All reps should follow the same protocol, and not be left individually to determine requirements or processes to follow for credentialing. Set expectations for reps during the onboarding process to understand the importance of credentialing compliance to your company and customer relationships and what is expected of them as an employee.

As part of the onboarding process, perform the necessary background checks and verifications and explain the importance behind these steps, including federal, state and industry requirements, the potential consequences and cost of noncompliance, and the benefits of maintaining compliance.

Reps that are educated on credentialing practices during onboarding are better positioned for success in the long-term.

This reinforces the value of credentialing to the company from the start and helps to create a culture of compliance. It also supports an efficient program enabling credentialing program administrators, or reps, to handle just renewal requirements or the occasional one-off requirements needed for a specific healthcare organization.
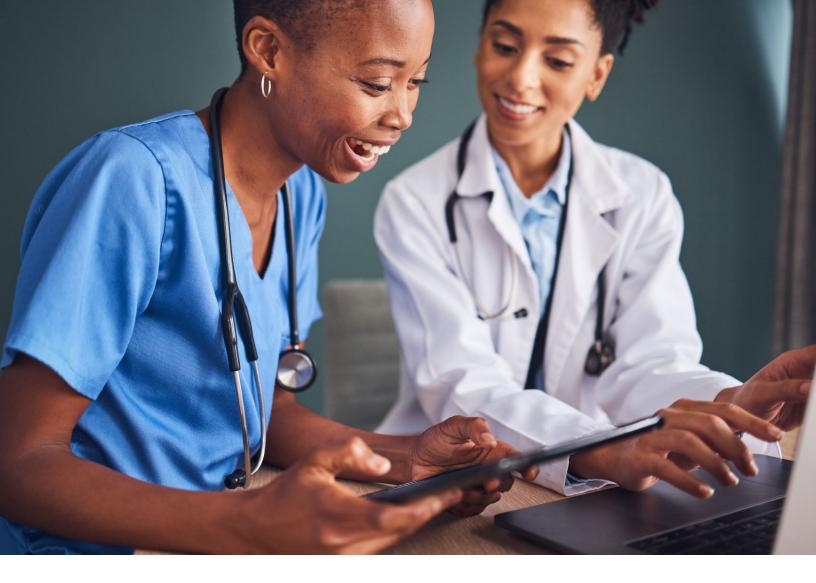
Take a proactive approach to credentialing compliance requirements

Some credentialing requirements impact customer relationships more than others. It is important to educate reps on which requirements are appropriate for them to sign off on without company review/approval and those they should escalate to management for review prior to sign off.

A centralized approach, managed under a credentialing administrator, can help by giving reps a single point of contact in your company who can guide them on customer requirements.

Reference the "Establishing Credentialing Policy Acknowledgment Guidance" sidebar for common requirements and general guidance by category. You may use this information to help develop your specific requirements and escalation process for your company and its reps.

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Collaborate with stakeholders

Certain customer credentialing requirements will impact your company's HR policies, with some likely duplicates of your company's own employee requirements (e.g., background/sanction checks). Align your HR and sales teams so they can communicate on overlapping requirements and work collaboratively to maintain credentialing compliance internally and externally as requirements change.

Offer ongoing education and training

Noncompliance with credentialing requirements can lead to a variety of consequences, including denial of access to healthcare facilities or providers, loss of business opportunities and revenue, reputational damage, and regulatory fines and penalties. It is critical that you offer ongoing education and training to help your reps stay compliant.

Maintain an open door policy

It is important for your company to foster open communication and collaboration around your credentialing program. Encourage reps to ask questions and provide an efficient path to get answers. All program stakeholders (e.g., program administrator, reps, sales leaders, HR) should have the opportunity to provide feedback on the credentialing process to drive continuous improvement.

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Establishing Credentialing Policy Acknowledgment Guidance

Level 1

Usually focused on facility access and rep contact while at the facility. A rep can generally sign off on these after they review. Examples:

- Parking
- Cell phone/wireless communication use
- Tobacco use
- Facility access: registration requirements, sign-in/out procedures, hours, appointments, etc.
- Conduct/appropriate behavior

Level 2

Could impact relationship with the customer. If after careful review the rep feels a request is unusual, they should escalate to the credentialing administrator. Examples:

- Acknowledging the completion of training requirements (other than product competency) and immunizations
- Access to operating room (OR) or other procedural areas
- Conflict of interest or Stark Law disclosures

Level 3

Could impact relationship with the customer. Reps should contact the credentialing administrator before signing. Examples:

- Request for personal information (driver's license or social security numbers, performance reviews, etc.)
- Re-processing of materials or inventory
- Business Associate Agreements (BAAs)
- Terms and conditions (termination clauses)
- Indemnity (limitation of liability)
- Penalties/disciplinary actions (some type of "punishment" or termination of vendor)
- Waiver of subrogation
- Pricing

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Maintain a Best-in-Class

Vendor Representative

Credentialing Program

With credentialing compliance requirements constantly changing and your company and its reps signing new customers, credentialing must be an ongoing process not a one-time task. Your company's credentialing program administrator must keep on top of changing requirements, quickly and effectively identify and address compliance gaps, and reinforce to your reps the importance of the program and their commitment to it.

Monitor and evaluate credentials

As with any process, establishing and tracking key performance indicators (KPIs) is crucial to meeting performance goals. In the case of credentialing program evaluation, important KPIs include reps' badge history (e.g., when allowed or denied access to a facility), credentialing compliance reports (e.g., missing, soon to be expired credentials), and logged customer support calls.

Having these metrics available at your administrator's fingertips in a centralized solution supports an efficient and effective credentialing program, one that is proactive versus reactive and helps reduce the risk for credentialing noncompliance.

Establish regular reporting and reviews of these metrics. For example, leverage them during your monthly sales calls to assess performance based on your KPIs, identify gaps and take action to address them.

Reinforce credentialing compliance

A credentialing program is only as good as the willingness of the company and its reps to comply with it. Take steps to enforce rep registration and sign-in credentialing compliance at customer facilities.

Your company's credentialing administrator should proactively reach out to noncompliant reps as they see program deviation.

Foster a strong relationship with your reps and continue to communicate the importance of your credentialing program via your company's communication channels (e.g., meetings, employee newsletter, website, etc.). Always tie it back to the customer and patient safety and how credentialing compliance is a core component of sales success.

Regularly update policies and procedures

If your company's business with your customers may involve access to or use of protected health information (PHI), it may qualify as a business associate (BA) covered by the Health Insurance Portability and Accountability Act (HIPAA). This could happen, for example, if your reps' jobs involve access to patient care areas or customer systems containing or transmitting PHI.

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If your company qualifies as a BA, you and your program administrator will want to work with your compliance and legal advisors to understand the impact on your company and your reps, including things like the need for business associate agreements, training, prompt data breach reporting, and security controls. Your company's and reps' interactions with your customers may bring other regulatory requirements into play and affect credentialing. For example, your reps may gain access to personally identifiable information (PII) that is protected by the laws of one or more states, or they may need to navigate anti-corruption laws of various jurisdictions. Your company and program administrator will want to stay informed of regulatory developments that may impact credentialing requirements. Any changes should be matched against your company's current program and necessary adjustments made to rep compliance criteria.

Credentialing Support From a Trusted Partner

In some companies, credentialing program administration becomes a full-time job. An average med-device company spends a cumulative 21,358 hours per year on credentialing across administrative, human resource, and sales departments, according to 2021 GHX internal data. Depending on your company size and customer base, you may find that you need not one individual but a team to manage your credentialing program.

GHX Vendormate's Credentialing Managed Service subject matter experts are trained in vendor credentialing documents and policies and can help provide guidance to navigate vendor credentialing systems—not just those associated with Vendormate.

This ability to leverage a dedicated team knowledgeable about the complexities of credentialing can help your company expedite and streamline administrative requirements across multiple credentialing systems while reducing costs.

Whether you have a team of 25 or 2,500, the managed service can help as a single point of contact, guidance for completing credentialing requirements, immunization assistance, attestation assistance phone support and more.

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Conclusion

While credentialing can be a complex and time-consuming process for vendors and their representatives, it is a necessary practice that cannot be ignored in the healthcare industry.

Recent industry news reports cite efforts by some legislators to standardize vendor credentialing requirements at the state level (e.g., Louisiana, Florida, Minnesota, New Jersey, Rhode Island) but to date no legislation has passed. And a uniform credentialing standard on a federal level "does not appear feasible in the foreseeable future."[5]

That means vendors and their reps will continue to be challenged with meeting diverse credentialing compliance requirements from state to state, health system to health system, and facility to facility. AdvaMed's Terry Chang comment on credentialing, "If it can be done more efficiently and just as effectively, that would be best for patients and our health care system."[5]

Use our guide to help you establish, implement and maintain an effective and efficient credentialing process that unites your company and its reps in meeting customer needs. Demonstrating compliance with credentialing requirements not only benefits customers but also helps protect vendors, their reputations, and their market share.

Additionally, leveraging a dedicated team knowledgeable about the complexities of credentialing, like GHX Vendormate's Credentialing Managed Service, can help expedite the process and increase credentialing compliance while reducing costs.

Overall, implementing efficient and effective credentialing practices is crucial for vendors and their reps in building strong customer relationships, helping to ensure safety, and maintaining credibility in the healthcare industry.

» Reach out for information on Credentialing Managed Service at **salessupport@ vendormate.com**

[5]Executive Director Blog: Terry Chang of AdvaMed and His Advocacy for Standardized Healthcare Vendor Credentialing, C4UHC, February 2023, https://c4uhc.org/executive-director-blog-terry-chang-of-advamed-and-his-advocacy-for-standardized-healthcare-vendor-credentialing/

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