Appendix B

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GUIDANCE FOR CONDUCTING AN EFFECTIVE ON-SITE PRODUCT DEMONSTRATION & EVALUATION

This document has been developed by Medtech Canada in consultation with health care organizations to provide guidance to Membership and to prospective purchasers on how to prepare for and conduct effective on-site product demonstrations and evaluations.

The objectives of this document are to: i) promote consistent, fair and transparent processes within the supplier community, ii) encourage accountability for public funding and optimal allocation of resources and iii) ensure that all stakeholders (hospitals, independent health care facilities, purchasing organizations, and suppliers) maximize the benefits afforded by on-site product demonstrations and evaluations through a consistent understanding of the key requirements.

A “Checklist” has also been included in the Appendix to assist the Demonstration Co-ordinator in preparing for and documenting key elements of a successful demonstration process.

Definition:

On-site product demonstrations & evaluations are situations where healthcare organizations evaluate equipment in their own clinical environment on a short-term basis in the presence of the supplier company as part of the equipment selection process. The equipment remains the property of the company over the course of the evaluation. The company in consultation with the healthcare facility shall determine if providing an on-site demonstration/evaluation is appropriate in each circumstance.

For equipment where the care, custody and control does not remain with the supplier, policies and documentation related to “loaning equipment” will apply.

Stage One: Pre-Demonstration & Evaluation Requirements

1. Notice of Demonstration

Upon short list notification and a request to provide product demonstrations, Medtech Canada members will use best efforts to arrange such demonstrations as soon as they are able. Based on the availability of the appropriate equipment and resources, this planning and co-ordination could take up to 4 weeks.

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In the event that the demonstration or evaluation needs to be cancelled by either party, a minimum of 5 business days written notice will be provided.

2. Demonstration & Evaluation Agreement

Any required Demonstration Agreement should be communicated well in advance of the demonstration date and signed by both parties prior to commencement of the demonstration.

3. Key Information and Requirements prior to Demonstration & Evaluation

In order to optimize the demonstration, the following information should be shared and agreed to by all parties prior to the demonstration or evaluation:

- Identify and book accordingly the types of procedures that wish to be evaluated so that the demonstration equipment can be appropriately configured
- Where appropriate, consider reducing the number of patient bookings during the demonstration period to allow for a better evaluation by staff
- Identify evaluation criteria, key stakeholders & clinical specialties to participate in demo
- Each organization (hospital & supplier) to identify a key contact to facilitate communications between the parties (name, title, phone number & email address)
- Mutually agree to the dates of the demonstration, allowing sufficient time for equipment set up and testing prior to clinical demonstrations, time for staff training, days for the demonstration and time for equipment to be packed up and removed from the facility. Times required may vary based on the type of equipment being evaluated.
- Site to communicate to supplier any requirements for screening for entry into OR Suites or Specialty areas (ie. proof of insurance, NDAs, security checks, immunizations…) in advance of the demonstration
- Site to provide appropriate room/space for set-up & testing of demonstration equipment (a lead lined room is required for c-arms and mobile x-ray machines) as well as a secure location should the equipment be required to stay at the site outside of the demonstration hours
- Site to identify a key contact person for networking information and set up and to provide required networking information, such as: IP Addresses, IP Subnet, IP Gateway, DICOM Modality Worklist information & other information as requested by supplier
- Shipping & Receiving: Site to provide the correct "Ship To" address, identify the type of dock available and the opening & closing hours of the Shipping/Receiving Department
- Site to provide a no-charge Purchase Order for the demonstration equipment unless mutually agreed that this is not required

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- Supplier guarantees that all medical devices provided for demonstration have been properly licensed by Health Canada, and that the product being demonstrated fits the exact specifications of that quoted by the supplier.
- With the co-operation of the healthcare facility, supplier is responsible for the delivery, installation and removal of the equipment

4. Duration of Product Demonstrations & Evaluations

The following are **suggested** guidelines for the duration of the demonstration and evaluation period, depending on the type of equipment:

Ultrasound	3 days maximum
C-arms, Mobile Radiography	1 week maximum

Each demonstration will identify in advance a mutually agreed upon delivery date, installation/set up period, training period and a removal date.

Note: For mobile radiography, the first day (typically a Monday) will be used for product delivery, set up & staff training with clinical demonstrations to begin on day two.

5. Escalation of Member Issues about an On-Site Product Demonstration

Should any concerns related to On-Site Product Demonstration requests arise amongst Medtech Canada Members, the member organization will contact Medtech Canada, who will in turn, address these concerns with the purchasing organization, explaining why/how their request does not fit with Medtech Canada's on-Site Product Demonstration Guidance.

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Appendix: Diagnostic Imaging On-Site Product Demonstration & Evaluation Checklist

Stage One: Pre-Demonstration	Most Responsible Person	Date	Completed
Written notice of Dates available to Supplier	Manager	Up to 4 weeks prior	
Return Signed Demo Agreement to Supplier (if required)	Stakeholders	Up to 4 weeks prior	
Communicate to supplier any requirements for screening for entry into OR Suites or Specialty areas	Manager	Up to 4 weeks prior	
Provide no charge PO for shipping and tracking the demo equipment	Purchasing	Up to 4 weeks prior	
Provide complete shipping and delivery instruction	Manager	Up to 4 weeks prior	
Identify the type of dock and Hours that is available at the Shipping/Receiving Department - notify Supplier	Purchasing	Up to 4 weeks prior	
Identify key stakeholders that will be participating / evaluating during the product demonstration - communicate to Supplier & staff	Stakeholders	Up to 4 weeks prior	
Book down the regular patient workload on the system being evaluated	Manager	Up to 4 weeks prior	
Provide Supplier with evaluation schedule - start times, rooms etc.	Senior or Charge Tech	Up to 2 weeks prior	
Book room for testing & setup of demo equipment (a lead lined room is required for c-arms & mobile x-ray machine setup), and confirm a secure location for the equipment if required to remain on-site outside of demonstration hours	Manager	Up to 2 weeks prior	

Stage Two: Clinical Demonstration & Evaluation Day	Most Responsible Person	Date	Completed
Supplier rep(s) to register/sign-in according to facility policy			
Supplier rep(s) to observe facility policy pertaining to infection control	Senior or Charge Tech	Day before start	
Confirm Bookings reduced to accommodate Demo			
Move system from biomed to final evaluation room	BIOMED / Supplier	Day before start	
Allow supplier access to system 1 hour prior to start time	Senior or Charge Tech		
One Hour system training and overview prior to first case	Stakeholders / Supplier		
At the end of each day or as pre-determined by the customer and supplier, review to ensure required cases have been completed	Stakeholders / Supplier		
At end of the demo, the customer ensures (with support of the supplier) that all patient data are removed and the equipment is cleaned according to supplier provided recommendations	Senior or Charge Tech / Supplier		