



*Updated: March 2016*

## GUIDANCE FOR STAGING AN EFFECTIVE SITE VISIT

### PURPOSE OF DOCUMENT

**This document has been developed by Medtech Canada to provide guidance to its Membership in responding to site visit requests by prospective purchasers. 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) provide guidelines for effective and efficient Site Visits for all involved parties (i.e. suppliers, purchasing organizations, and hospitals).**

For the purpose of this document, a “purchasing organization” is defined as an organization with an official interest and participation in the decision-making process, including hospitals, clinics, purchasing groups, local or regional health boards, etc. A modality is considered to be product areas such as Angiography, CT, MR, Computed Radiography, Digital Radiography, PACS, etc.

Medtech Canada Members understand the occasional need for prospective purchasers (“purchasing organizations”) to evaluate products at clinical and/or manufacturing sites, as an important part of the equipment selection process. Ensuring quality site visits and an optimal experience is of paramount importance to the Medtech Canada members as well as to the purchasing organizations. If deemed appropriate by members, they may agree to fund such evaluations and visits in accordance with the following limitations and directions:

#### 1. Site Visit Planning

In order to allow adequate time to organize site visits and effectively meet the purchasing organization’s objectives, a minimum of (4) four weeks written notice is requested for all site visits. It is also recommended that specific site visit dates be published as part of each tender, and that site visit dates and participants (along with the participants information – contact info, travel documents, etc. required for travel if applicable) be confirmed upon publication of “short listed” suppliers. This will allow Medtech Canada members to coordinate travel to best accommodate the purchasing organization.

Site visit plans may be shared by suppliers in order to improve efficiency of scheduling for all participants involved but may not be used to increase the recommended number of attendees.

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### 2. Site Visit Location

Every effort will be made to conduct site visits locally where local sites best represent the Member's product of focus for procurement. For multi-modality purchases, the site visit may include one location per single modality.

### 3. Number of Purchasing Organization Representatives Permitted on Site Visits

Purchasing organization representatives should be employees or team members with clinical privileges at the purchasing organization or relevant hospital. As visits are for the sole purpose of clinical evaluation of products, site visits should only include clinical personnel such as physicians, technologists, administrative directors, physicists and bio-medical engineers. For PACS or RIS-related Visits, Clinical IT, IT Admin and/or IT Consultants are encouraged to participate.

It is also recognized that in some instances, a non-clinical representative from the purchasing organization may be required to attend the site visit to ensure fairness and integrity of the process. To respect patient privacy during the site visit, only clinicians can be present in-patient treatment areas; all non-clinical attendees are requested to stay outside of rooms where patients are undergoing treatment (e.g. angiography suites).

All of the guests listed above will be included in the total number of Purchasing Organization attendees whose travel and expenses can be covered by the members as outlined below:

- a) **Single modality projects cannot exceed a total of 3 purchasing organization representatives.**
- b) **Multi-modality projects cannot exceed a total of 5 purchasing organization representatives.**
- c) **Bulk buy/multi-site projects cannot exceed 7 purchasing organization representatives.**

**Note: Multi-site organizations are considered a single purchasing organization for the same modality regardless of the number of sites represented.**

Should the purchasing organization request additional representatives, it is allowable however the purchasing organization will be responsible for paying all associated travel and other expenses for such representatives.

There may be some consideration for the addition of a maximum of one more representative to the above limits if there is a need for multiple sub-speciality representation. The additional representative will represent the combined interests of the multiple sub-specialties and will be mutually agreed upon by all members.

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### 4. Number of Visits

Only one (1) visit per single modality project should be made. Members should request that the representatives required for equipment selection be identified at the time of the site visit request and that all travel information be provided to ensure timely booking of any travel arrangements that may be required. To support fairness, the purchasing organizations must utilize their best efforts to ensure that the identified representatives do not change throughout the equipment selection process.

### 5. Duration of Site Visits

The duration of site visits shall be no longer than is necessary to evaluate the products and their clinical and technical capabilities. Medtech Canada Members shall provide the purchasing organization with an itinerary prior to the commencement of the site visit that clearly identifies the equipment and model that is being demonstrated.

The Medtech Canada Code of Conduct applies and will be followed regarding any activities and interaction on site visits.

### 6. Screening Policies for Entry into OR Suites or Other Specialty Areas

Any requirements for screening at host sites (i.e. proof of insurance, NDAs, security checks, immunizations...) must be communicated by the Supplier to the Evaluation Team well in advance of the Site Visit.

### 7. Travel Expenses and Meals

Medtech Canada Members will offer the same travel arrangements to Purchasing Organizations as are offered to their own employees. Business Class or First Class travel is not permitted nor is it reimbursable by Medtech Canada members.

Meals may be provided as an occasional business courtesy when part of a *bona fide* exchange of scientific, educational or business information. The time, duration of meals, and the venue in which they are provided should always be subordinate to the business purpose and fall within each Company's compliance policies. Should the purchasing organization have a more restrictive policy than Medtech Canada's, it is the purchasing organization's policy which will be applied.

This Medtech Canada Site Visit Guidance shall apply to all site visits whether the customer or supplier is paying for the travel.

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### 8. Escalation of Member Issues about a Site Visit

Should any concerns related to Site Visit 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 Site Visit Guidance. Escalation documents and guidelines for process are available on the Medtech Canada website.