Using Vendormate Credentialing

Table of Contents

Vendormate Credentialing

Vendormate Credentialing helps healthcare providers streamline and simplify the management of the credentialing process, including vetting access requirements, ongoing sanction list checks for vendor entities and representatives, and integrated badging to meet compliance standards.

Software Requirements

- Supported browsers
  - Mozilla Firefox 65.x and above
  - Google Chrome 75.x.x.x and above
  - Apple Safari 11.x.x and above
- Adobe Reader 10.0 and above
- Other requirements
  - Vendormate Credentialing uses a secure Internet connection between the health system browser and the remote-hosted application

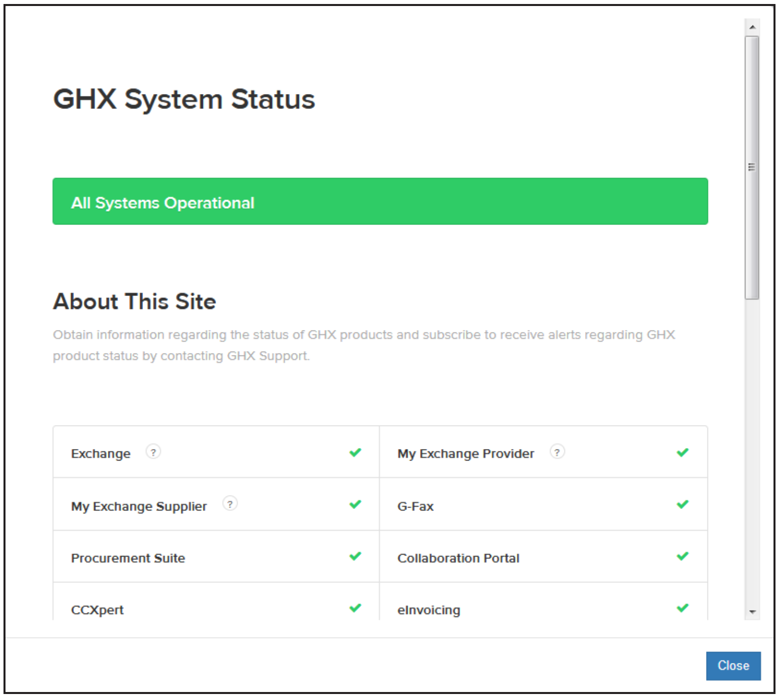
    > Note: Port 443 needs to be open to allow this secure connection.

  - Health systems that limit user access to the open Internet may need to allow vendormate.com and ghx.com domains as trusted sites

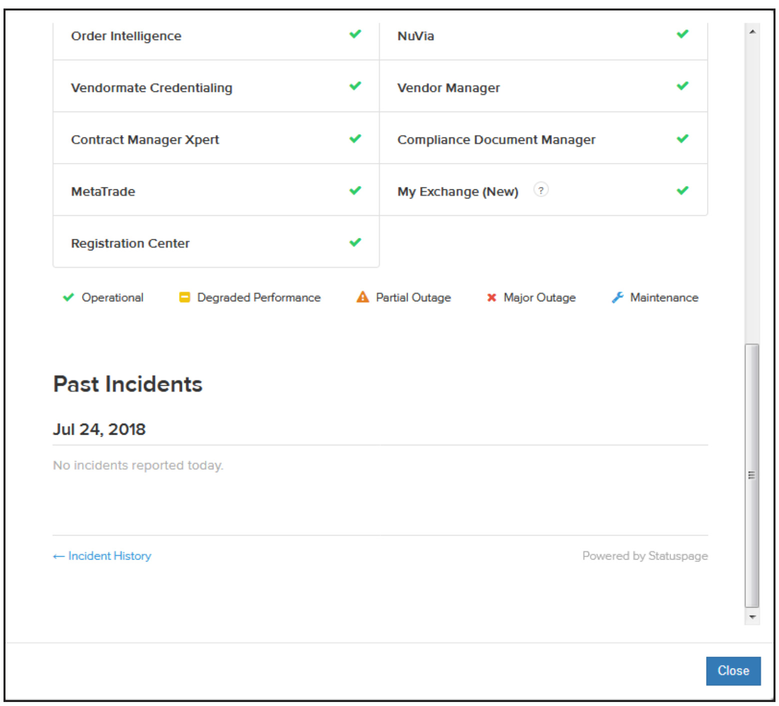
View System Status

Use the following steps to view the status of GHX products.

1. Click the system status icon. The *GHX System Status* dialog box opens.



2. Scroll down to view the current status of GHX products and to view past incidents.



3. Click **Close**.

Getting Started

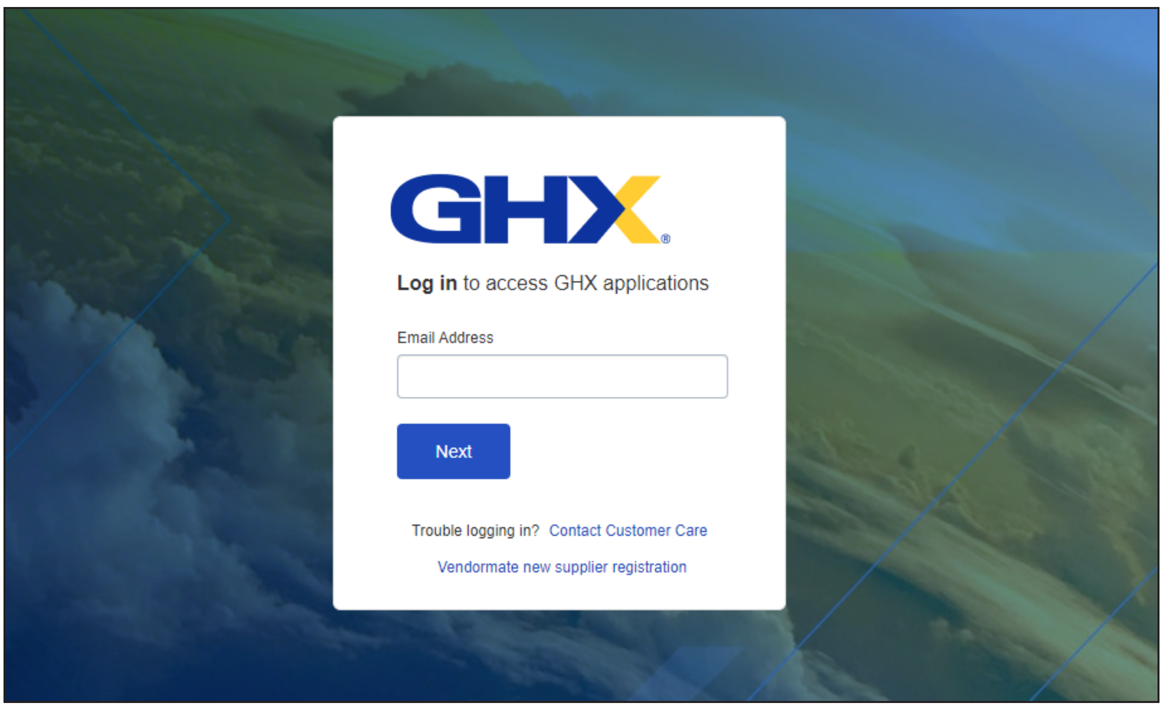
Before using this application, you should customize your user experience by taking the following actions:

- Edit your profile.
- Download the Vendormate Credentialing app.

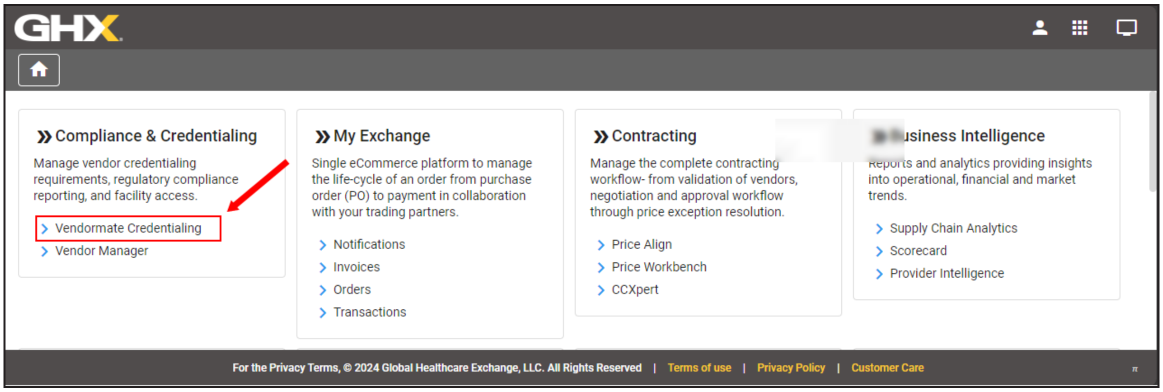
Log In

Use the following steps to log on to the application.

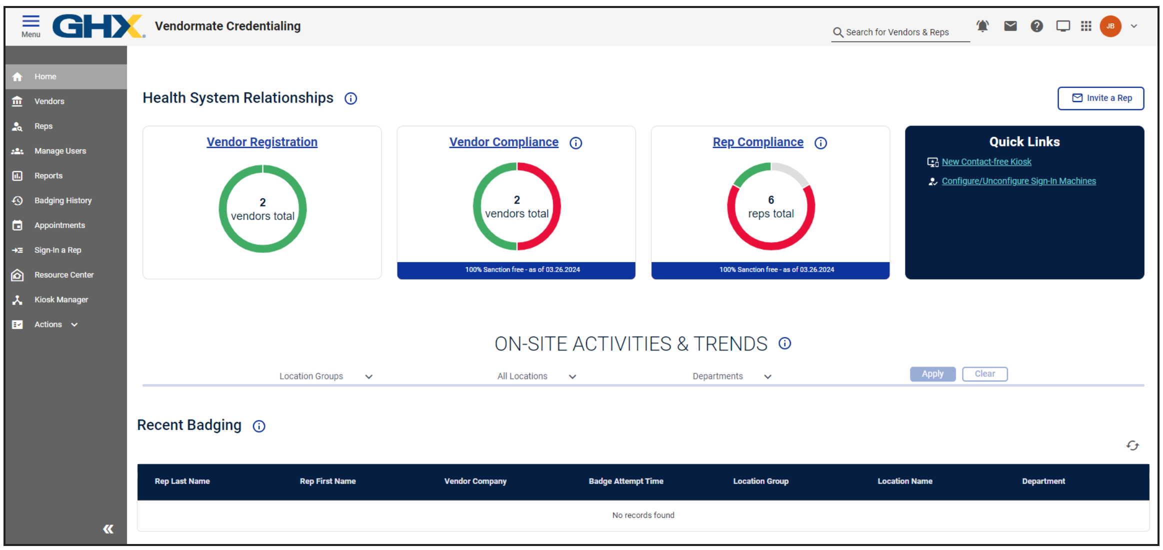
1. Go to c. The *GHX Login* page opens.



2. Type your user name and password.
3. Click **Login**. The GHX home page opens and lists the applications to which your organization subscribes.



4. Click the **Vendormate Credentialing** link. The *Home* page opens.



Log Out

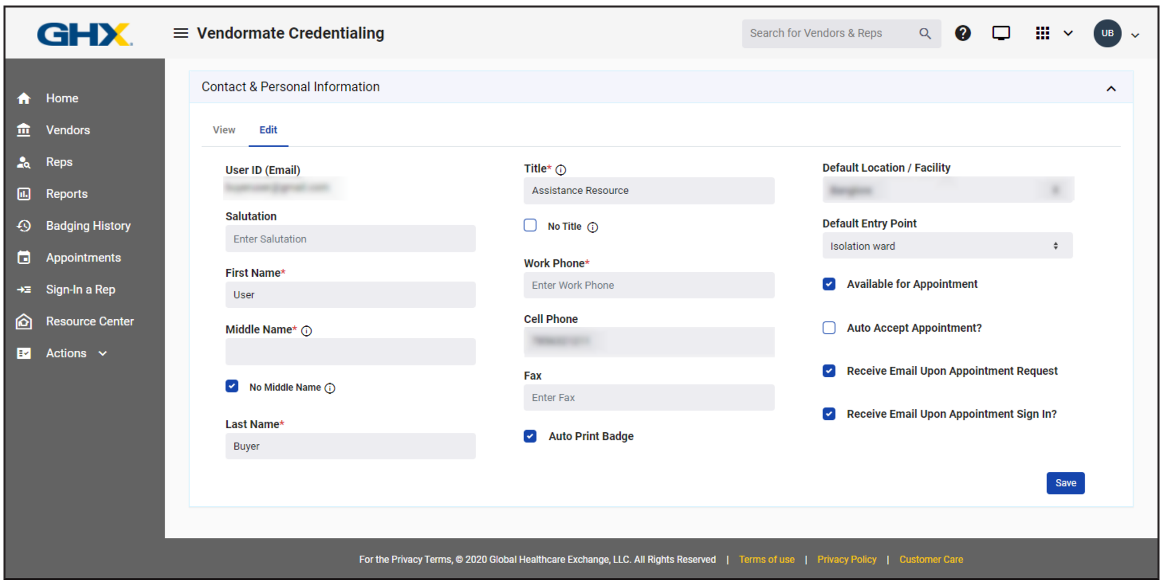
GHX recommends that you log out from the top banner menu rather than simply closing the browser window.

1. Point to your user name icon in the main menu bar on the right. A list of options opens.
2. Select **Logout**.

Edit Your Profile

You can edit certain information in your profile, including your title, phone numbers, and default location.

1. Click your user name icon to open a list of options.
2. Select **My Profile**. The *Contact & Personal Information* page opens.



3. Click **Edit**.
4. Modify the information, as needed.

> Tip: Because your email address is also your unique user ID, you cannot change your email address.

5. Click **Save**.

Download the Mobile App

Providers can use the mobile app to:

- Enforce compliance remotely
- Set up email alerts for non-compliant badging events

- View badging history
- Manage appointments
- Administer checkpoints for temperature screening

Click the following links to download the mobile app:

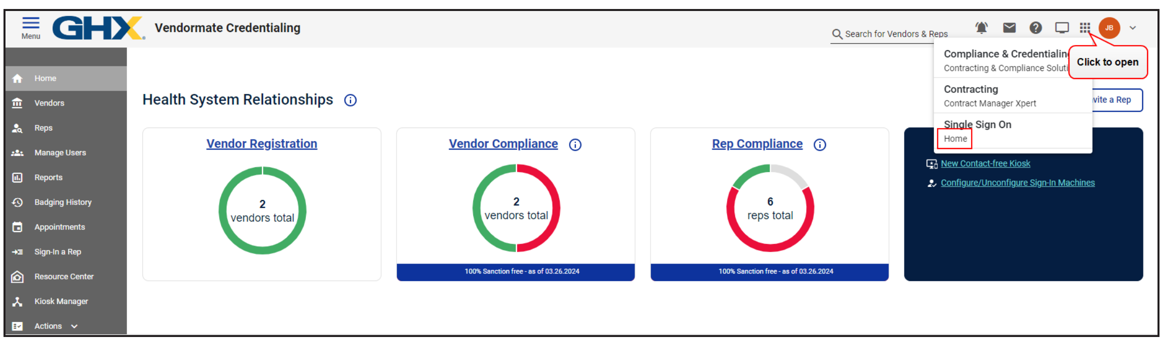
- Android app
- Apple app

Change Your Password

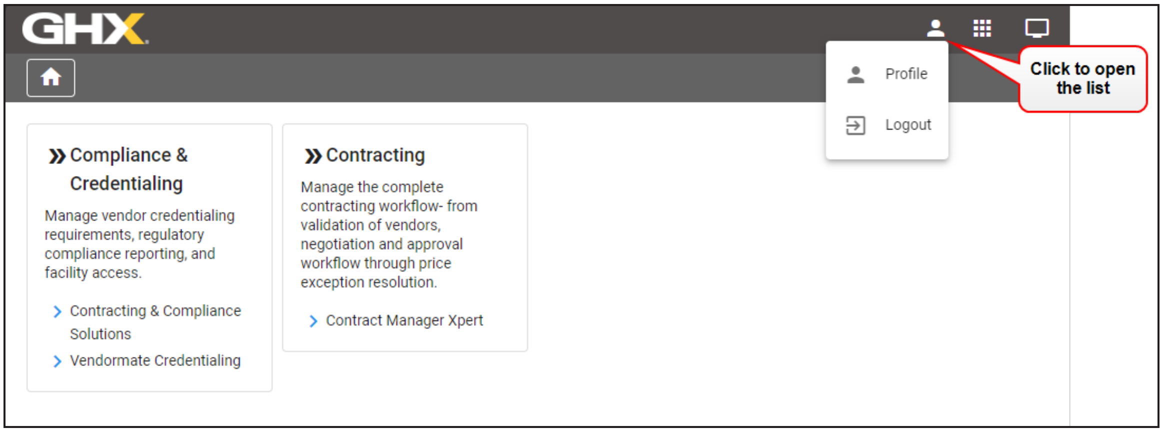
You can change your Vendormate Credentialing password on the single sign on page.

> Caution: Changing your password makes the change for all GHX applications that are connected to the single sign on functionality.

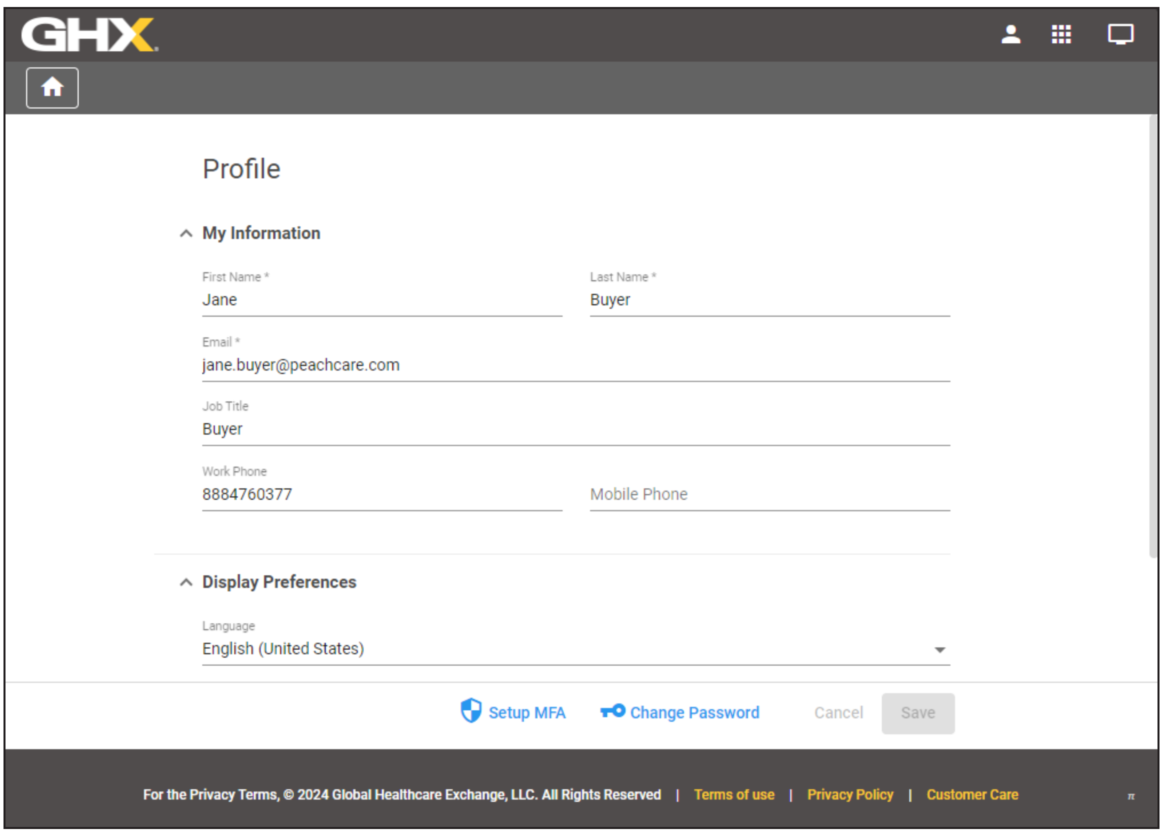
1. Click the icon to open the list of options and select **Home**. The GHX portal single sign on page opens.



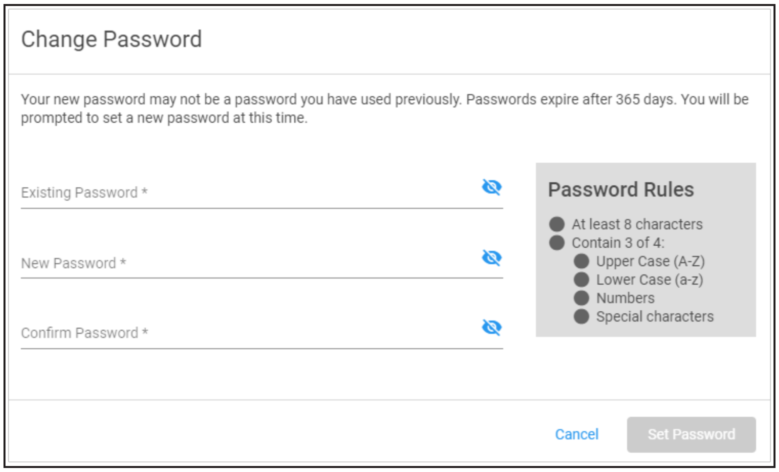
2. Click your user name in the main menu on the right. A list of options opens.



3. Select **Profile**. The *Profile* page opens.



4. Scroll down and click the **Change Password** link. The *Change Password* page opens.



5. Type your current password in the **Existing Password** field.
6. Type a new password in the **New Password** field.

What are the password requirements?

- Must be at least 8 characters
- Must contain 3 of the following 4 attributes:
  - Upper case letters (A-Z)
  - Lower case letters (a-z)
  - Number (0-9)
  - Special characters (for example #, &, !, $, etc.)

Your new password may not be a password you have used previously.

Passwords expire after 365 days. You will be prompted to set a new password at this time.

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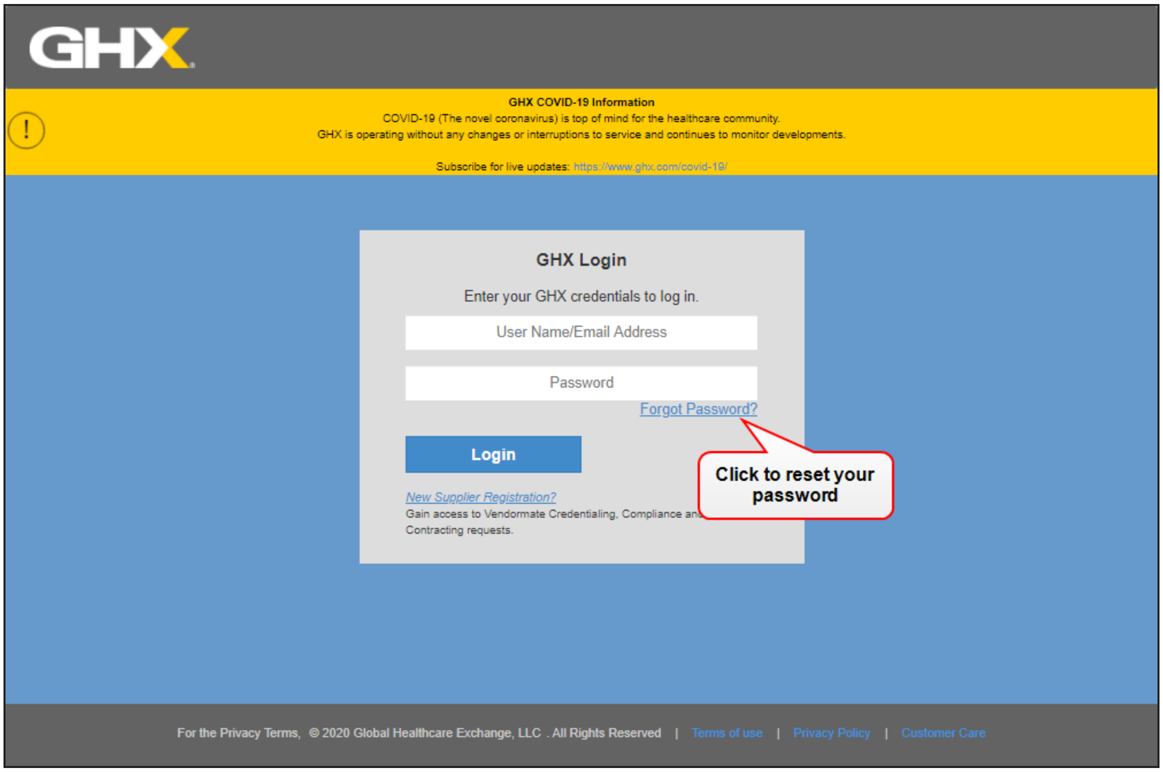
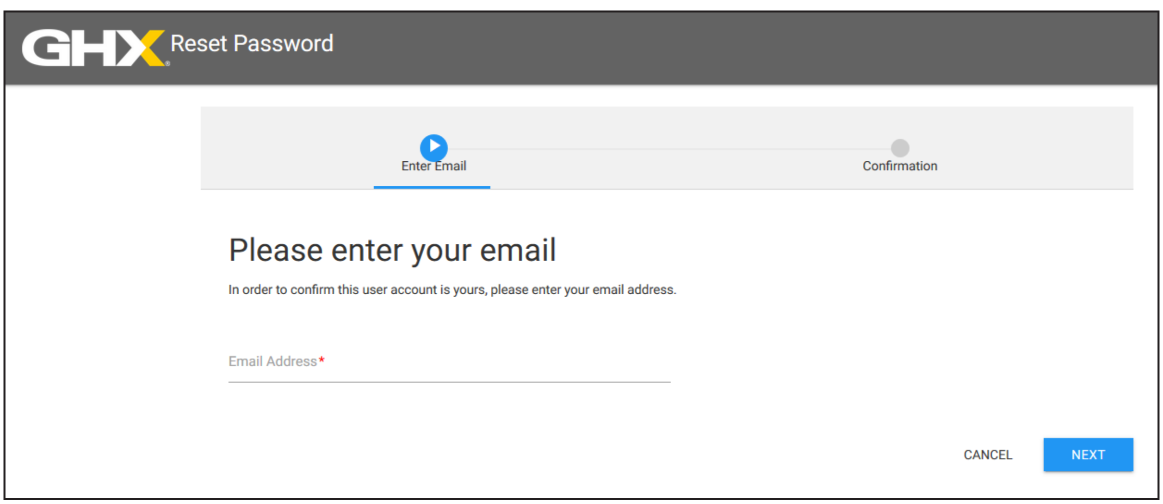
7. Type the same password in the **Confirm Password** field.
8. Click **Save**. GHX changes your password for all GHX applications that are connected to single sign on functionality and sends a confirmation email message to the address associated to your user account.

Reset a Forgotten Password

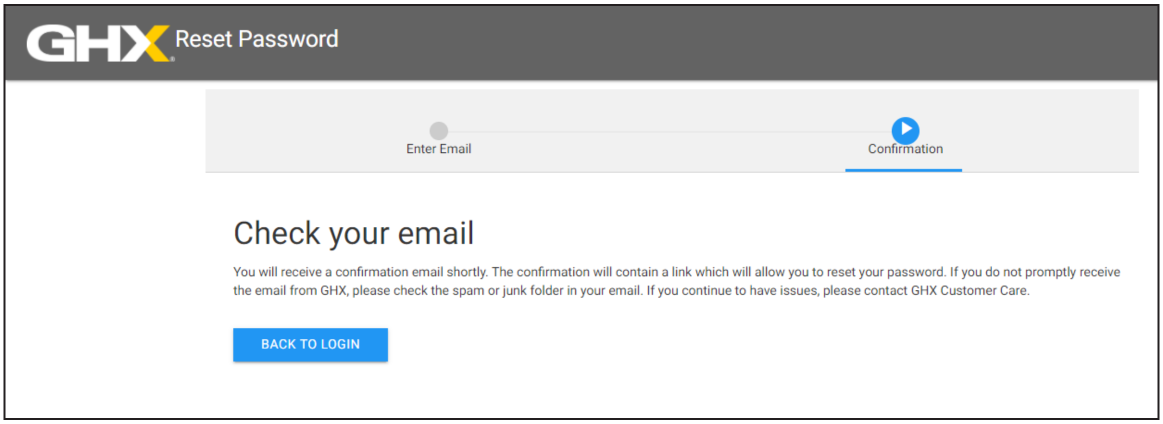
1. Go to https://login.ghx.com. The *GHX Login* page opens.



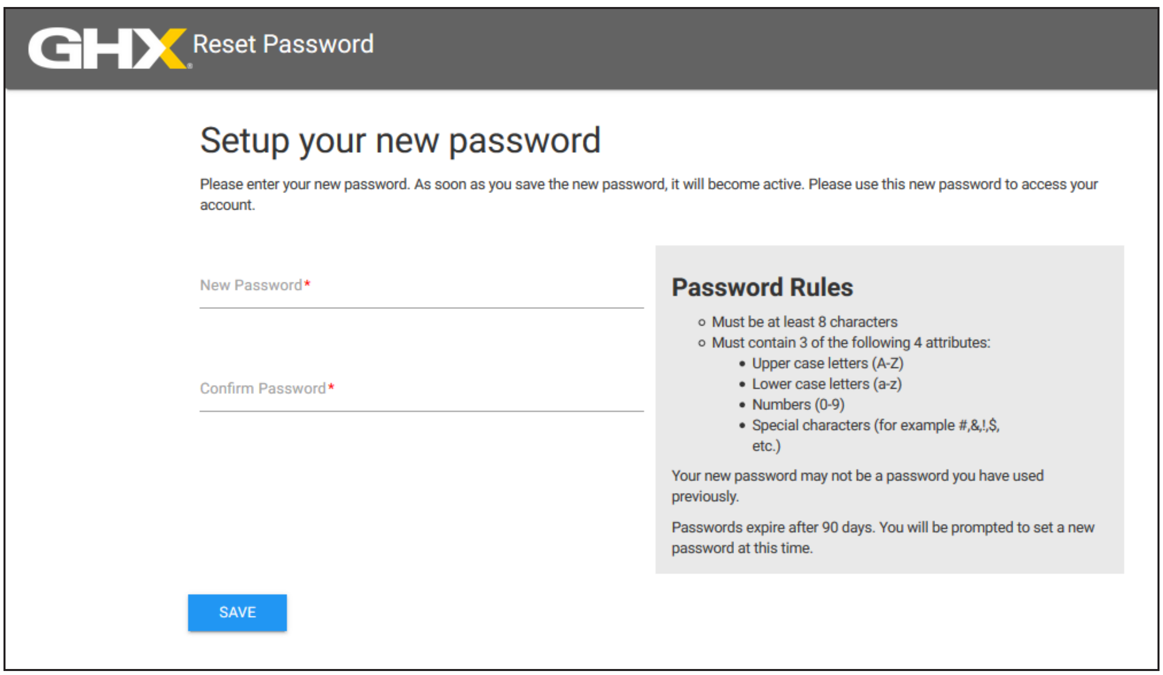
2. Click the **Forgot Password** link. A *Reset Password* page opens.



3. Type your email address and click **Next**. The *Check your email* page opens.

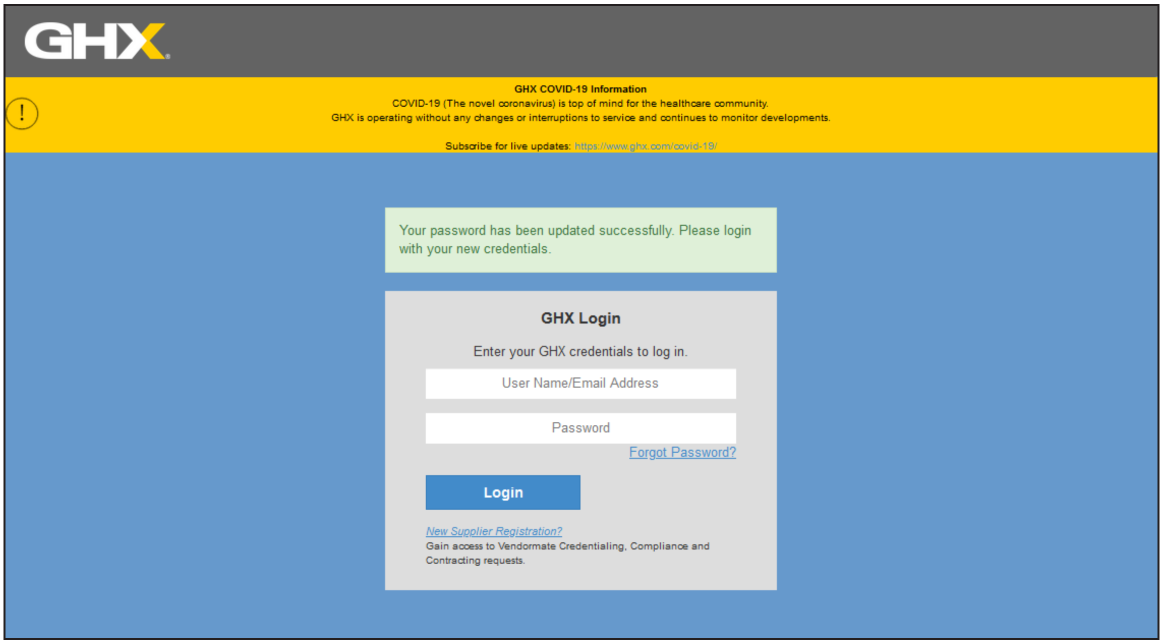


4. Open your email application and click the link in the password reset message. The *Setup your new password* page opens.



5. Type a new password in the **New Password** field and type the same password in the **Confirm Password** field.

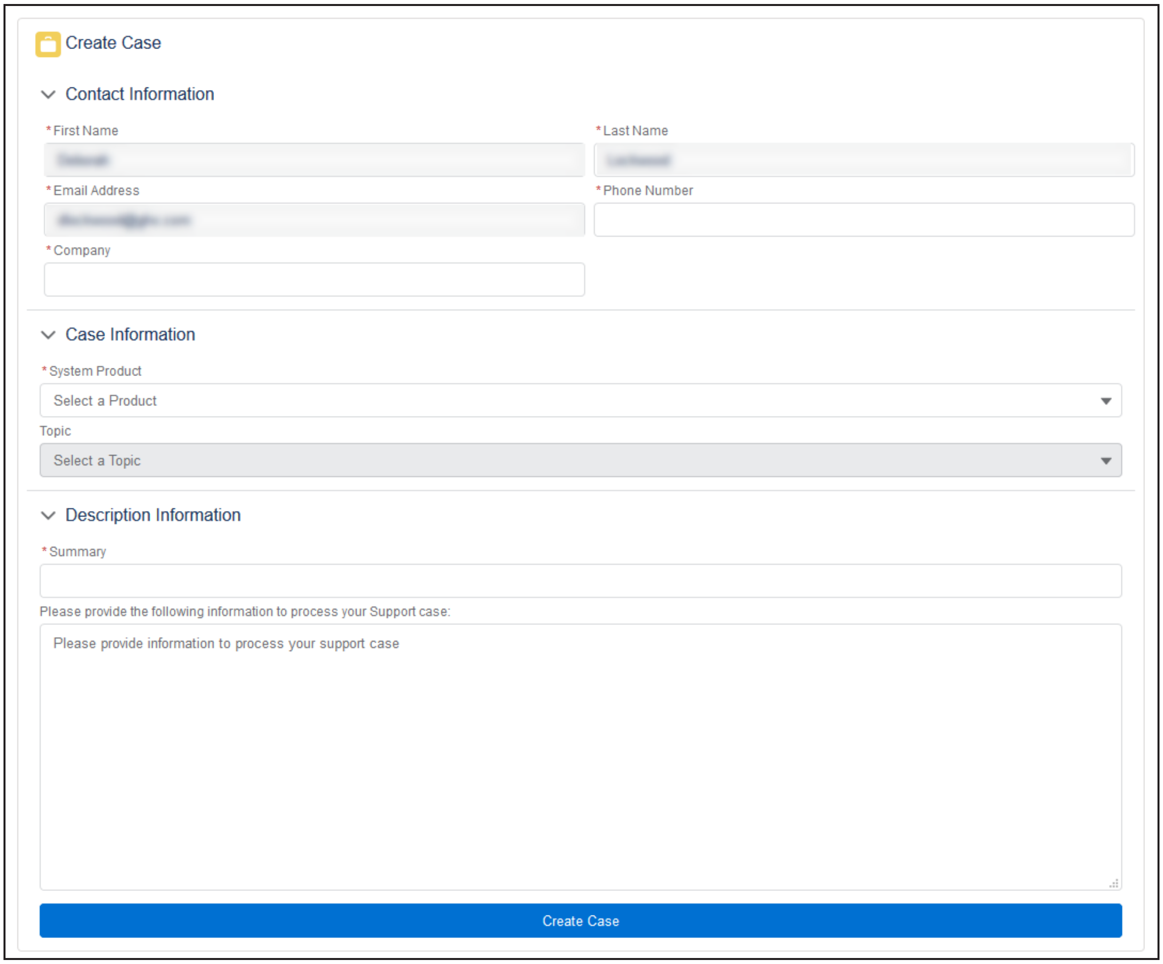
6. Click **Save**. The *GHX Login* page opens and displays a success message.



Create a Case

There may be times when you need to notify GHX of a system issue. You can do this by creating a support case.

1. Click the **Create Case** link in the footer on any page. The *Create Case* form opens in the GHX Community.



2. Complete the required fields and click **Create Case**. The system creates a case and routes it to a GHX Customer Care representative.

Identify Icons

The following table contains a list of icons that are used in this application.

Icon	Name	Description
	Acknowledged	Indicates the policy was acknowledged.
	Clear filter	Click to clear filters in a table.

Icon	Name	Description
	Collapse	Click to collapse an area on the page.
	CSV	Click to export data to a .csv file.
	Expand	Click to expand an area on the page.
	Expired	Indicates a document has expired for the requirement.
	Expiring	Indicates the document will expire soon.
	Fail	Indicates the vendor or rep is not in compliance.
	Help	Click to open the help system for this application.
	Incomplete	Indicates the rep's background check is incomplete.
	Information	Point or click to view tooltip text.
	Missing	Indicates a document has not been uploaded yet and the requirement is in a grace period.
	Missing	Indicates a document has not been uploaded yet for the requirement.
	Pass	Indicates the vendor or rep is in compliance.
	PDF	Click to export data to a .pdf file.
	Refresh	Click to refresh data on a page.
	Rejected	Indicates the document does not meet the verification criteria for the requirement. See the

Icon	Name	Description
		rejection notes for more information.
	Rep Blocked	Indicates the rep has been blocked from entering the facility.
	Solution selector	Click to move between GHX software solutions (for example, between Vendormate Credentialing and My Exchange).
	Sort	Click to sort information in a table column.
	System status	Click to view the status of GHX's systems.
	Unverified	Indicates the document has not yet been reviewed and verified by the documents team.
UB	User name	Click to view user account options. You will see your initials in the circle.
	Verified	Indicates the document or background check meets the verification criteria for the requirements.
	Verified Alternate	Indicates an alternate document has been uploaded for the requirement. Note: Not all hospitals may allow badging access with this status.
	XLS	Click to export data to an Excel .xls file.

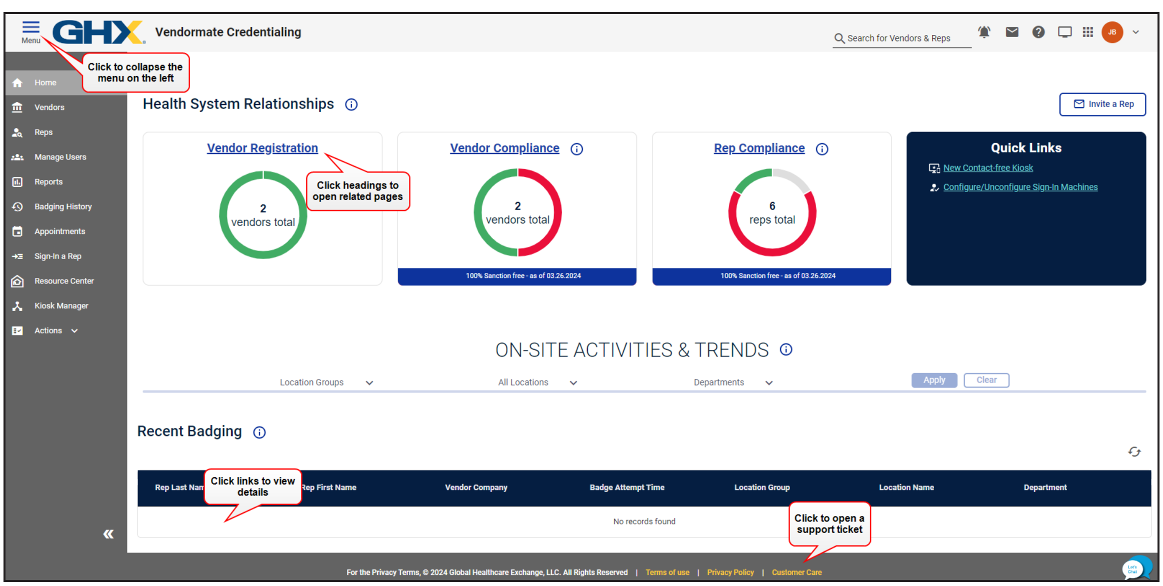
Navigation

The following dashboard elements are available on the **Home** page.

- Click **Home** to view recent activity
  - **Health Systems Relationships -** Evaluate the registration and compliance fulfillment efforts of your health system's vendor and rep relationships.
  - **On-Site Activities and Trends -** View on-site trends by locations, groups, and departments.
  - **Recent Badging** – The default view includes the last five visitors to your health system. Use the number buttons to change how many rows are shown.
  - **My Upcoming Appointments** – Shows scheduled appointments (if your health system is using the appointments feature)
- Click the icon to refresh the data

> Tip: Point to the icon to see the date and time when the data was previously refreshed.

- Click the links in the main menu on the left to open pages and perform related actions
- Click the **Customer Care** link in the footer to create a support case with GHX Customer Care



Main Pages

Click the following menu options on the left to open the application's main pages:

- **Vendors** – Use to identify each vendor's compliance and score vendors
- **Reps** – Use to identify each rep's compliance and score reps
- **Reports** – Use to manage vendor rep activity
- **Badging History** – Use to see the results of your facility's access log, and click the rep or vendor name to view the full profile
- **Appointments** – Use to create, edit, and configure appointments
- **Sign-In a Rep** – Use to sign a rep in or out of your facility
- **Resource Center** – Use to make important information available to users (for example, FAQs or user guides)
- **Actions** – Use to see a list of common actions when managing reps and vendors

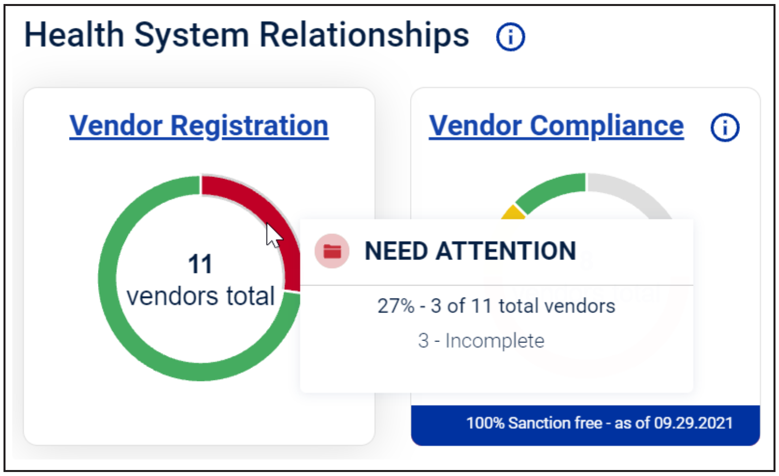
Note: Admin users will see a **Manage Users** option that they can use to create, edit, activate, and inactivate user profiles.

Buyer Dashboard

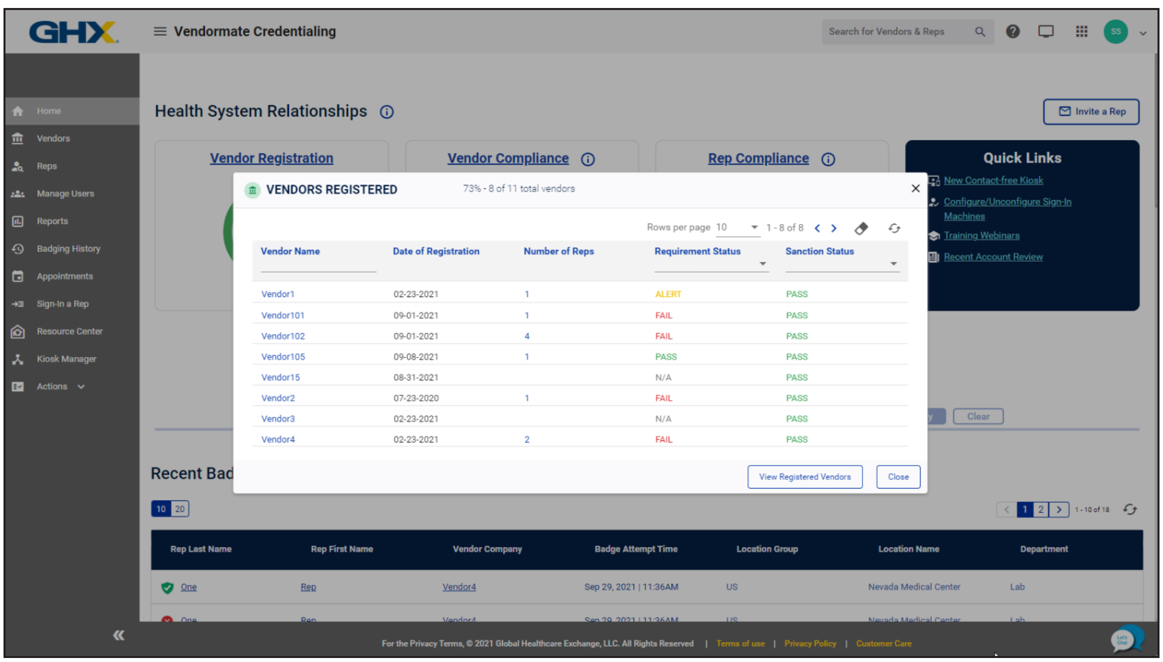
Taking the concept of a Home page to a whole new level, the Buyer Dashboard offers a plethora of features that give you insights into your credentialing program at the entire health system level.

Vendor Registration:

1. Mouse over the different colored sections on the Vendor Registration chart.



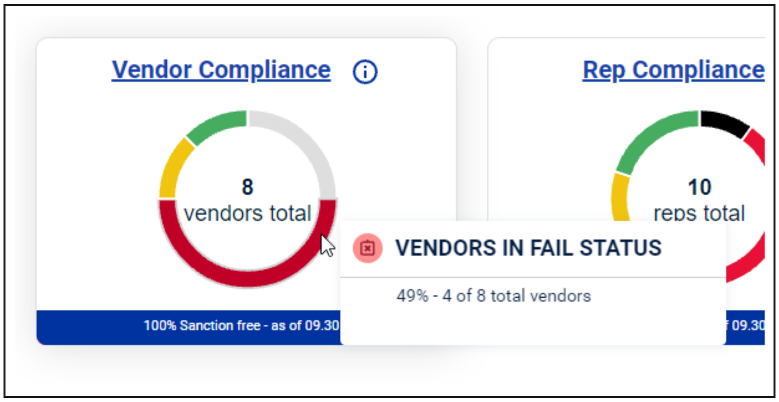
2. Click a section of the chart to open further details.



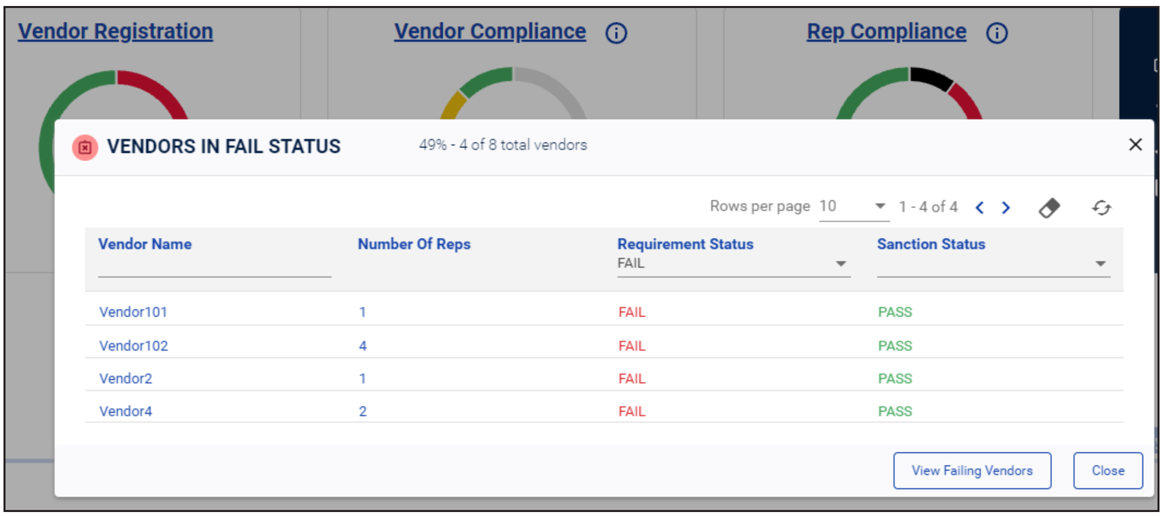
Click the icon to watch a video about this topic.

Vendor Compliance:

1. Mouse over the different colored sections on the Vendor Compliance chart.



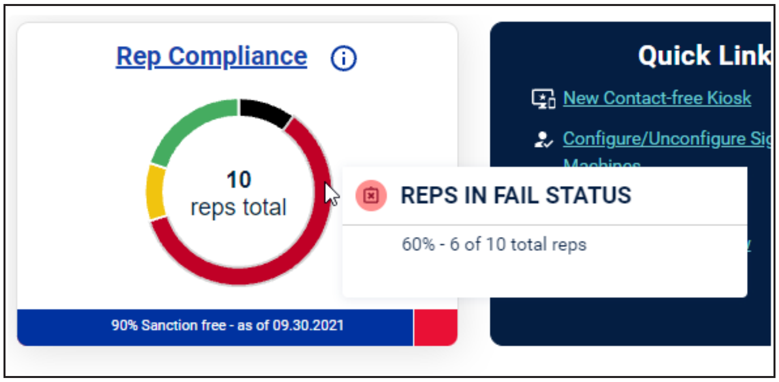
2. Click a section of the chart to open further details.



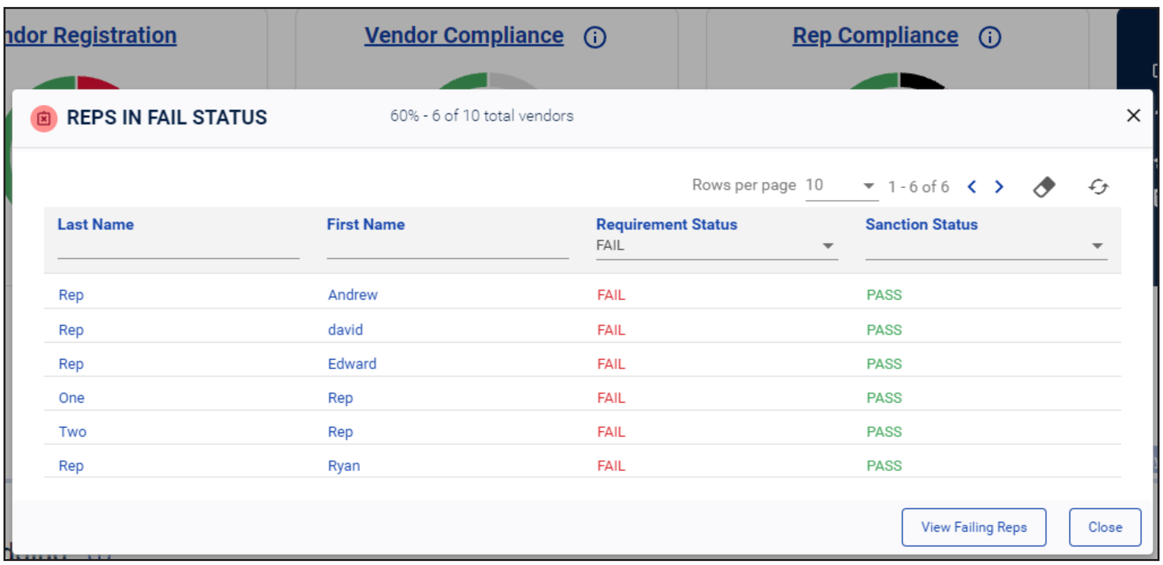
Click the icon to watch a video about this topic.

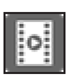
Rep Compliance:

1. Mouse over the different colored sections on the Rep Compliance chart.



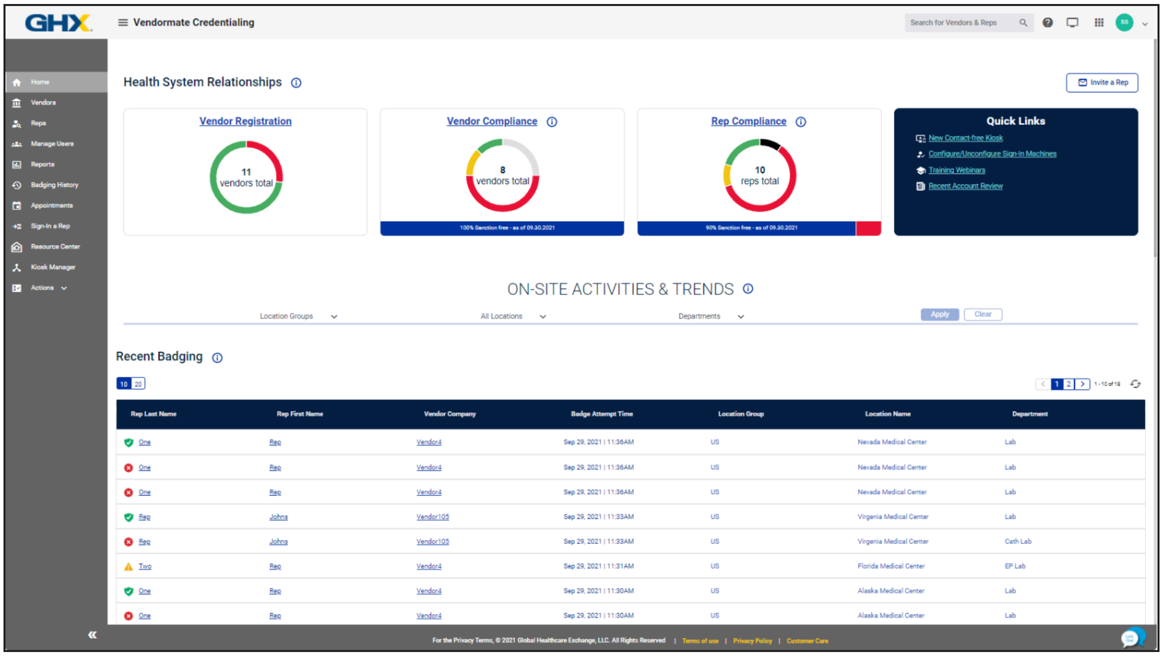
2. Click a section of the chart to open further details.

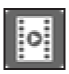


 Click the icon to watch a video about this topic.

On-site Activities and Trends:

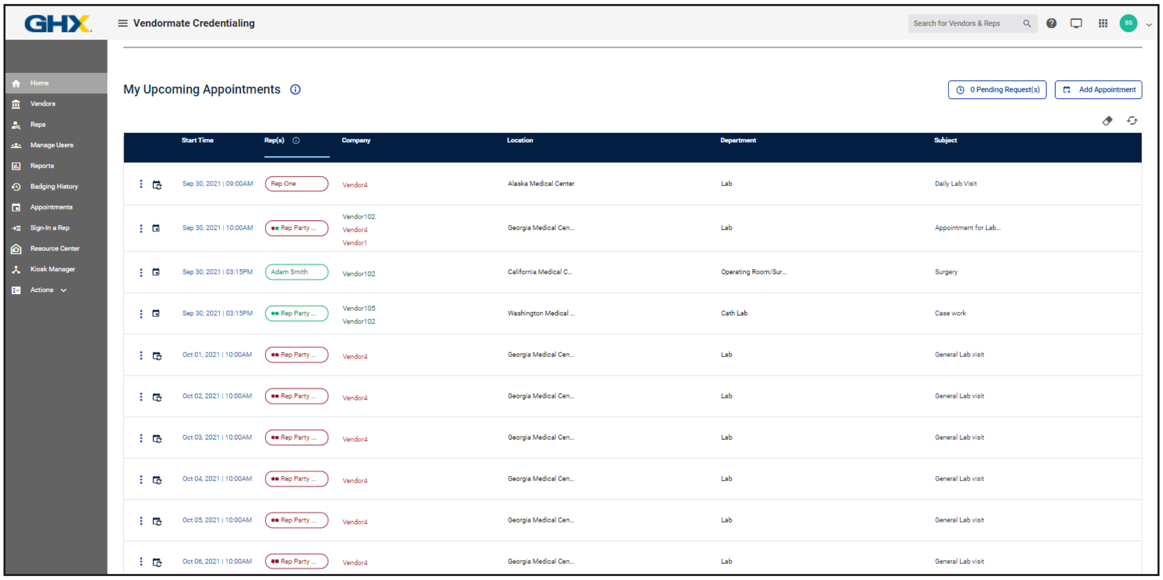
1. Scroll down to the **On-site Activities and Trends** section of the Buyer Dashboard.
2. Review recent badging. You can filter the information to make it more specific.

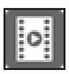


 Click the icon to watch a video about this topic.

Appointments:

1. Scroll down to the **My Upcoming Appointments** section of the Buyer Dashboard.
2. Review your next 10 appointments. You can filter the information, add an appointment to your calendar, and more.



 Click the icon to watch a video about this topic.

Manage Vendors

Use the Vendors page to identify companies that may not be in compliance with all necessary regulations and documentation requirements and to score vendors.

Tip: Scorecard results can be valuable for audits.

1. Click **Vendors**. The *Vendors* page opens.
2. Search for vendors using the text boxes at the top of the columns. Press ENTER to apply the search criteria.

   Tip: Vendormate Credentialing uses wildcard search. This means that you can use the asterisk * wildcard character in certain fields to narrow your search results.

3. Click the **Company**, **Doing Business As**, or **Requirement** status to open the vendor profile.
4. Click the **Sanctions** status to open a *Vendor Sanction Details* status list.
5. Click Select in the **Action** column to add an appointment with one of this vendor's reps.

View Vendor Profiles

The vendor profile is a single source for critical information about vendors. You can review compliance alerts at a glance, check for expired or missing documents, complete a score card, and see past results.

- **Vendor Details** – View general information about this vendor, link to diversity status documentation (if applicable), and click the **Badging History** button to view history for this vendor's reps
- **Score Card Rating** – Score this vendor, view past scorecard reviews, view the vendor’s average review, and click the **review** link to open the **Score Card** sub tab
- **Compliance Status** – Click the Sanction Status icon to open the Vendor Sanction Details popup, click the Rep Requirements Status icon to view the Reps subtab, or click the Company Requirements Status icon to view the Requirements subtab
- **Reps** subtab – View a list of reps registered with the vendor, and click a name to view the rep's profile information

- **Requirements** subtab – Review policy acknowledgements, required, and optional documents for this vendor; click the View Details link in the What column to view the document itself
- **Score Card** subtab – Create a review for the vendor or view results from previous score cards

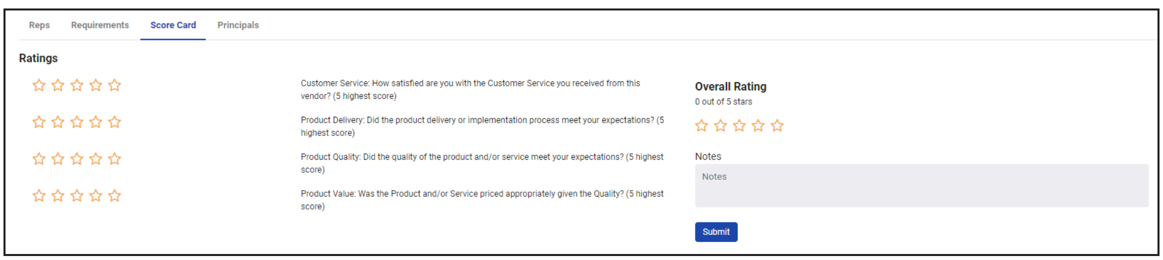
  Tip: Vendor representatives cannot see their scores.

- **Principals** sub tab – View contact information and sanction status results of the vendor principals

Score Vendors for the First Time

Anyone with Vendormate Credentialing access can score a rep or vendor. Ratings are maintained in the rep and vendor history and are averaged to assign an overall score. Score card results are visible to Vendormate Credentialing users at your health system, but not to the vendors. You can create score card reports to aggregate scoring data for review.

1. Locate the vendor you want to score using **Search** or by clicking the **Vendor** tab.
2. Click the vendor's name to open the profile.
3. Click the **0 review** link in the **Score Card Rating** section.



4. Rate the vendor from 1 to 5 stars for each question, with 5 stars being the highest.
5. Add specific notes about the vendor in the Notes section, if needed.
6. Click **Submit**.

See "Reports" on page 27 for detailed instructions on how to run the Scorecard report.

Manage Reps

Use the Reps tab to score reps and identify individual representatives who may not be in compliance with all necessary regulations and documentation requirements. Score card results can be used for internal quality control and for audits.

1. Click the **Reps** tab.
2. Search for reps using the text boxes at the top of the columns. Press ENTER to apply the search criteria.

> Tip: Vendormate Credentialing uses wildcard search. This means that you can use the asterisk * wildcard character in certain fields to narrow your search results.

3. Click a **First Name**, **Last Name**, or **Requirement** status to go to the rep's profile.
4. Click the **Sanctions** status to open a *Rep Sanction Details* status list.
5. Click the **Company** link to view the vendor profile.
6. Click an email address to send an email message to the rep using your preferred email application.
7. Click Select in the **Action** column to add an appointment with this rep, block or unblock the rep, and view block history.

View Rep Profiles

The representative profile is a single source for critical information. You can review compliance alerts at a glance, check for expired or missing documents, complete a score card, and see past results.

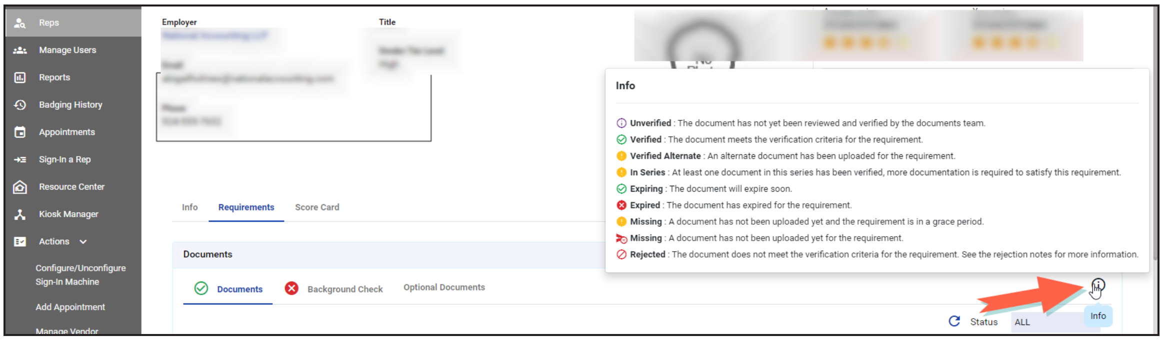
- **Rep Info** – View general information including a link to the Vendor Details page, a link to the rep's badging history, and a badge photo
- **Score Card Rating** – Score this rep, view past scorecard reviews, the rep's average review, and click the review link to open the Score Card sub tab
- **Compliance Status** – Click the Sanction Status icon to open the Rep Sanction Details popup, click the Requirements Status icon to view the Requirements subtab
- **Info** subtab – View the rep's supervisor information and Conflict of Interest responses
- **Requirements** subtab – Review policy acknowledgments, required, and optional documents for this rep; click the View Details link in the What column to view the document itself

- **Score Card** subtab – Create a review for the rep or view results from previous score cards

> Tip: Vendor representatives cannot see their scores.

Doc Status Icons

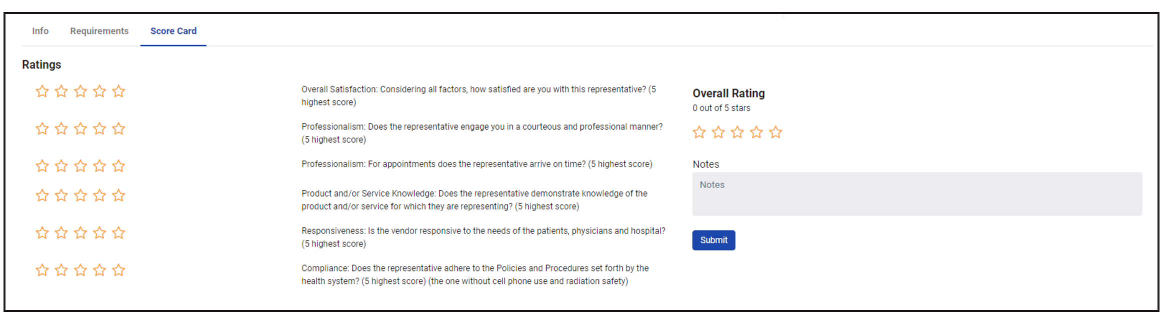
Not sure what the icons on the Rep Profile>Requirements>Documents screen mean? Simply click the Information icon for a legend that looks like this:



Score Reps for the First Time

Anyone at your health system with Vendormate Credentialing access can score a rep. Ratings are maintained in the rep history and averaged to assign an overall score. Score card results are visible to Vendormate Credentialing users, but not to vendor representatives.

1. Search for the rep you want to score or click the **Reps** tab.
2. Click the rep’s name to open the rep's profile.
3. Click the **0 review** link in the **Score Card Rating** section.



4. Rate the rep from 1 to 5 stars for each question, with 5 stars being the highest score.

5. Add specific notes about the rep in the Notes section, if needed.
6. Click **Submit**.

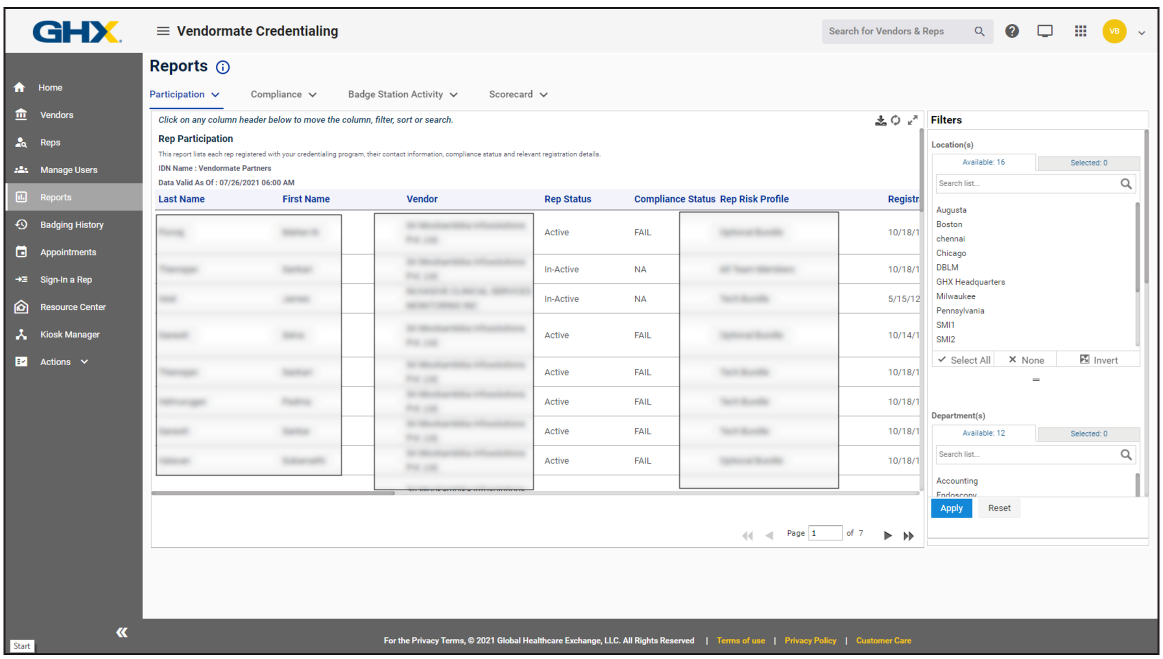
See "Reports" on the next page for detailed instructions on how to run the Scorecard report.

Reports

Powerful reporting capabilities help you better understand and control vendor rep activity. You can view and manipulate reports within the User Interface (UI) or download the results for review and further processing.

Run Reports

1. Click **Reports**.
2. Click the icon next to a category to expand the list of associated reports
3. Point to a report name to view its description. Select the desired report from the drop-down menu. The report will load.



4. Point to a report name to view its description.
5. Select report criteria in the right pane.
6. Manipulate the data or choose to export.

Report Categories and Definitions

Click the + icons below to expand and see the names and definitions of each report in the corresponding category.

- **Participation** – Contains details about the registration status of vendor reps, vendor companies, and hospital staff members participating in your credentialing program

Participation reports

Report	Description
Rep Participation	Contains details about each individual vendor representative participating in your credentialing program
Incomplete Rep Registrations	Contains details about each rep that has started and not yet completed registration for your credentialing program
Rep Risk Profiles	Contains details about the answers each rep has provided to the risk profiling questions of your credentialing program
Vendor Participation	Contains details about each vendor company participating in your credentialing program
Incomplete Vendor Registrations	Contains details about each vendor company that has started and not yet completed registration for your credentialing program
Vendor Risk Profiles	Contains details about the answers each vendor company has provided to the risk profiling questions of your credentialing program
Hospital Staff Participation	Contains details about each staff member at your health system that has a profile in the system with access to your credentialing program

- **Compliance** – Contains details about the compliance status of the vendor reps and vendor companies participating in your credentialing program, and provides details of the credentialing requirements for your health system

Compliance reports

Report	Description
Rep Requirement Status	Contains details about the compliance status for each document or policy requirement for each rep that is registered in your credentialing program
Rep Sanction List Check Status	Contains details about the compliance status of each government sanction list check for each rep that is registered in your credentialing program
Vendor Requirement Status	Contains details about the compliance status for each document or policy requirement for each vendor company that is registered in your credentialing program
Vendor Sanction List Check Status	Contains details about the compliance status of each government sanction list check for each vendor company that is registered in your credentialing program
Document Verification Status	Contains the verification status, reason, and other details for each document that registered reps uploaded into your credentialing program
Health System Requirements	Contains a list of active document and policy requirements for your credentialing program
Blocked Rep History	Contains a list of blocked reps with your health system and the reason for blocking
Critical Policy Acknowledgements	Contains a list of critical policy acknowledgements for registered reps

- **Badge Station Activity** – Contains details about the visits and appointments of vendor reps captured at your credentialing program's badge stations

Badge Stations Activity reports

Report	Description
Badge Station Activity Log	Contains details about each badge station sign-in event at facilities in your credentialing program
Appointment History	Contains details about each previous rep appointment saved in your credentialing program
Badge Station Sign-In Offenders	Contains details about each rep that may have used multiple email addresses to circumvent the access restrictions in place as part of your credentialing program; includes each rep that has printed a badge but has not completed registration to gain compliance with your credentialing program
Non-Compliant Rep Sign-Ins	Contains details about the last sign in date for each rep that is non-compliant with requirements of your credentialing program
Sign-Out Failures	Contains details about each badging event where the rep has failed to sign out after receiving a badge to enter your facility
Badging Declaration Potential Offenders	Contains successful rep badging history in the 7 days prior to or 7 days since a failed declaration; this does not necessarily indicate a sign in offender but may be investigated at your discretion
Checkpoint Potential Offenders	Contains successful rep badging history in the 7 days prior to or 7 days since a failed checkpoint; this does not necessarily indicate a sign in offender but may be investigated at your discretion

- **Scorecard** – Contains details about the average scores and content for all vendor rep and vendor company scorecards created by hospital staff members

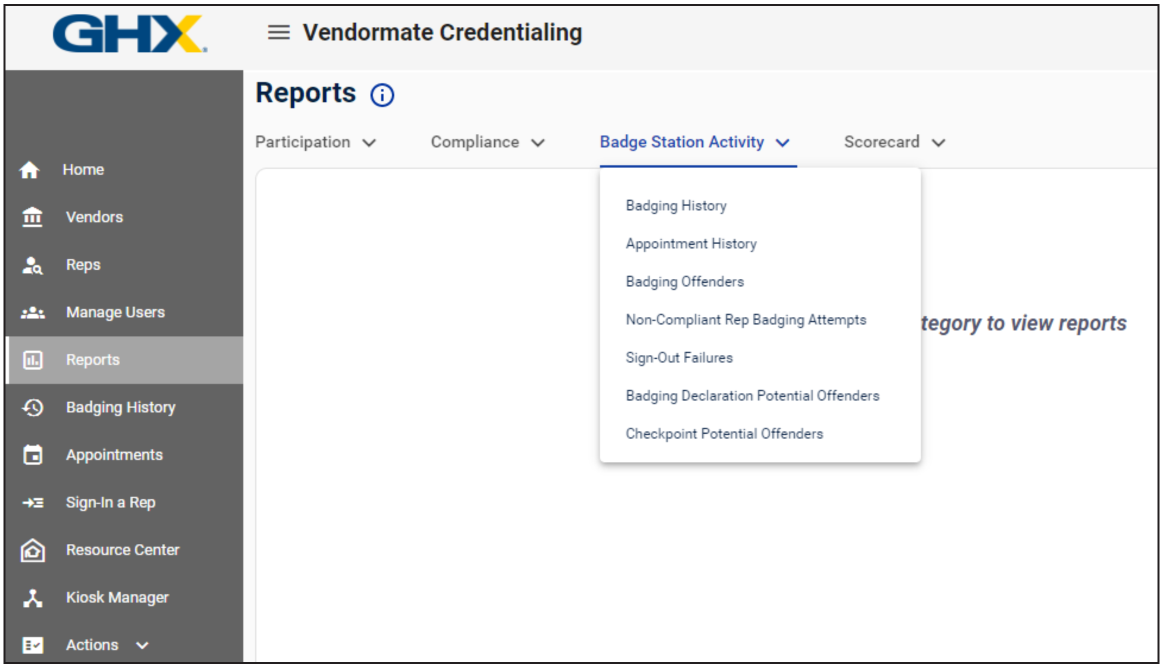
Scorecard reports

Report	Description
Rep Scorecard Results	Contains a list of average scores for each rep for which hospital staff has created a scorecard in your credentialing program
Rep Scorecard Details	Contains details about each scorecard that has been created by hospital staff for any rep in your credentialing program
Vendor Scorecard Results	Contains a list of average scores for each vendor company for which hospital staff has created a scorecard in your credentialing program
Vendor Scorecard Details	Contains details about the contents of each scorecard that has been created by hospital staff for any vendor company in your credentialing program

Run Badging Reports

Understanding who has been in your facility and where they gained access is extremely important to keep your organization safe. Vendormate Credentialing has a number of reports that help you gain that understanding.

1. Click **Reports**.
2. Click the icon next to the Badge Station Activity category to expand the list of associated reports
3. Point to a report name to view its description. Select the desired report from the drop-down menu. The report will load.



4. Point to a report name to view its description.
5. Select report criteria in the right pane.
6. Manipulate the data or choose to export.

Manipulate Report Data

You can manipulate your data in the User Interface (UI) or download it for further processing.

In the UI:

1. Run the desired report.
2. Set filters in the right-hand panel and click **Apply**.

   > Tip: Click a filter and press the CTRL key to select multiple filter options. Not all reports have filters.

3. Click a column header to reveal more options.
   - Click to hide the selected column or to open the Basic and Conditional Formatting dialog box

- Click to filter columns
- Use the arrow icons to sort
- Select, then drag and drop columns into desired positions

> Note: The adjustments you make will be sustained in your view and download. The Refresh icon only refreshes the viewable data. To return to the default view, you must exit the current report.

Download:

1. Select an output type. Options are:

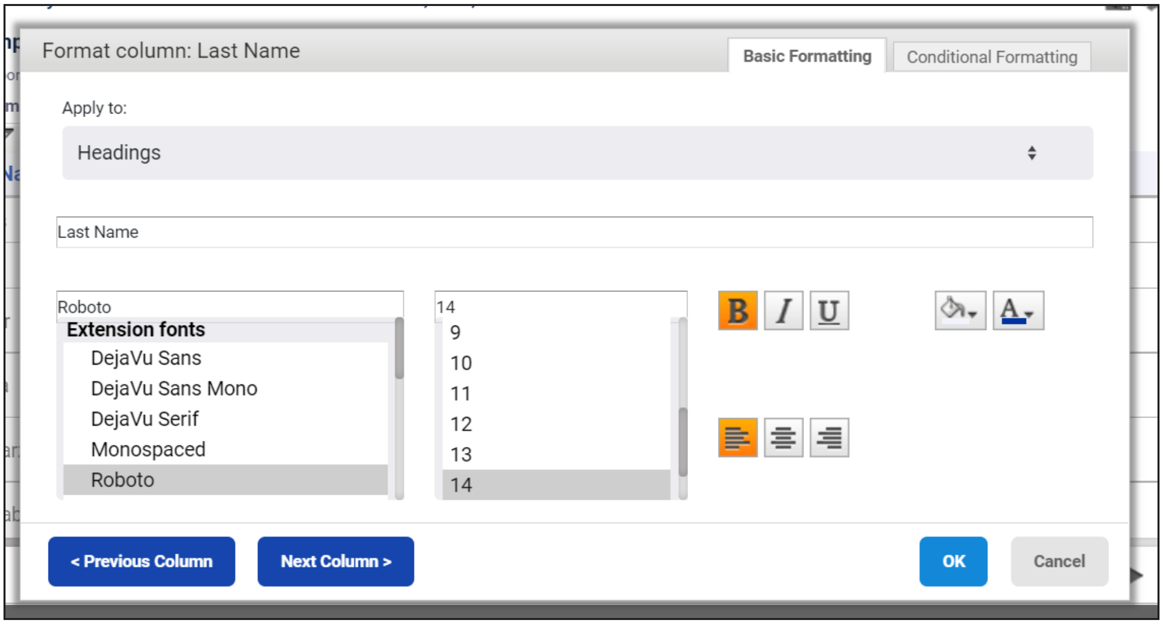
Output	Application
XLSX, XLS, and CSV	Microsoft Excel worksheet
PDF	Adobe Reader or Adobe Acrobat
RTF	Microsoft Word

2. Click the Download icon.

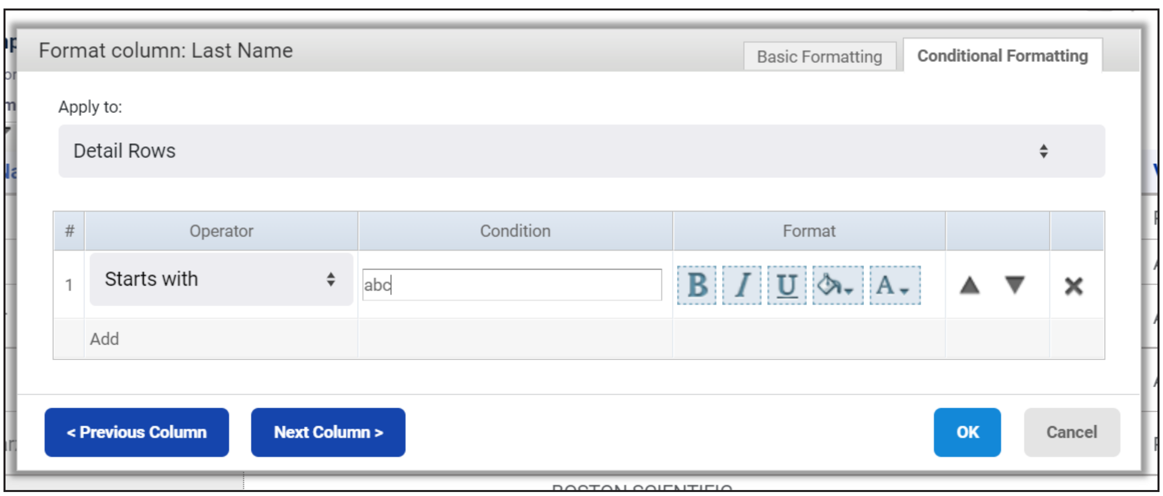
Use Column Formatting

To adjust the Reports column formatting:

1. Click to hide the selected column or to open the Basic and Conditional Formatting dialog box.
2. On the Basic Formatting tab, you can adjust the header font, the column content font, and the font color.



3. On the Conditional Formatting tab, you can narrow the returned results by applying conditions to the rows.



For example: You might click Add and choose the Operator "Starts with" and then type in the first 3 letters of a name. This would narrow your results to only show lines that start with those first three letters.

View Badging History

Badging History tracks and stores sign-in and sign-out data for each rep who attempts to print a badge. Use it to determine who is currently in your facility. This historical entry and exit data can be invaluable for certain audits.

Tip: Filter the columns by entering a date range, choosing from drop-down lists, or typing text in search boxes in the column headings.

The following features are available on the Badging History page:

- Download the search results as a .csv, xls, or .pdf file
- Click the links in the **Sign-In**, **Sign-Out** or **Message** columns to view the event details
- Click the rep's name in the **Rep Information** column to see the rep profile
- Click an email address link in the **Rep Information** column to send an email message to the rep
- Click the company name link in the **Company** column to view the vendor profile
- Point to the link in the **Message** column to read the complete text in a tooltip
- Scroll to the right to view additional information that you can use to sort or filter

Badging History Tips

Keep the following tips in mind when on the **Badging History** page.

- The data export limit is 1,000 lines; if you need more data, open the Badge Station Activity Log report on the Reports page
- By default, the last three days of on-site activity displays on the page; to look further back, adjust the date range in the **Sign-In** column
- If you are part of a multi-facility health system, type the site name in the **Sign-In Location** column to filter for your location; you may need to scroll right to view this column
- When using remote badge printing, select the **Printed remotely** option in the **Event Type** column drop-down list to filter for off-site sign in events

Manage Appointments

You can manage appointments by doing the following:

- Create new appointments
- Edit existing appointments
- Configure appointment requests
- Manage appointment permissions
- Manage appointment requests

Create Appointments

Vendormate Credentialing makes it easy to schedule appointments with vendor reps and staff. Healthcare systems can enhance on-site control by denying badges to reps who arrive at the facility without a scheduled appointment. Contact your Credentialing Delivery Manager if you need to change your appointment badge rules. Reps can print badges two hours before and one hour after the appointment start time, and up to one hour after the appointment end time.

> Note: When reps are not compliant and have used up all of their warning badges, they will not be allowed access to the hospital, even if they have a valid appointment. See Appointment FAQs for more information.

Hospital staff members must have a Vendormate Credentialing user account to be invited. Only administrators can add, edit, or inactivate users. See "Administration" on page 54 for details.

1. Click **Reps** .
2. Find the rep, click Select in the **Actions** column, and select **Add Appointment**. The *Add Appointment* page opens.

   > Note: Reps must be registered before you can schedule an appointment.

3. Select the appointment frequency. Options follow:
   - **One Time Appointment** – Select to create a one-time visit
   - **Recurring Appointment** – Select to create recurring visits; a dialog box opens where you can select the recurrence pattern

4. Select the time and place for the appointment. Required fields are:
    - **Location**
    - **Department**
    - **Subject** – Prints on the rep's badge at the time of the visit, and - when the email option is checked - is included in the invitation sent to attendees
    - **Description**
    - **Invited Staff**
    - **Invited Reps**
5. Select the checkboxes next to the names in the Invite Guests area to add staff and reps.
6. Scroll down and select the **Receive email of appointment** checkbox to send a calendar invitation to only yourself.
7. Select the **Send email of appointment to invitees** checkbox to send invitations to the staff and reps you invited.
8. Click **Save Appointment**.

Appointment FAQs

Q: Where can appointments be enforced?

A: Appointments can be enforced at the overall health system level, the specific location level, and by individual departments. Contact your Credentialing Delivery Manager to change your appointment badge rules.

Q: Will non-compliant reps still be able to print a badge just because they have an appointment?

A: No. Reps with appointments are still checked against current badge rules to determine access.

Q: Can printed badges be customized to display whether or not a rep has an appointment?

A: Yes. There are several different ways to display the appointment start and end time on both paper and label style badges. To configure this capability, ask your Credentialing Delivery Manager.

Q: Does Vendormate Credentialing capture responses to my appointment invitations?

A: No. Although appointment invitations are sent from Vendormate Credentialing, responses cannot be automatically posted to Vendormate Credentialing.

Edit Appointments

Only the health system staff member who created an appointment can edit or delete it. A recurring appointment refers to a series of meetings that happen at a regular interval. For example, you may have a rep who stops by every Tuesday at 3:00 PM.

If you are not sure of the exact timing for an appointment, you can set aside a block of time that encompasses when your meeting is likely to occur. Reps can print their badge beginning two hours before their appointment time and up to one hour after the end time.

Note: You cannot edit or delete appointments within two hours of the start time.

1. Click **Appointments**.
2. Adjust the search criteria to find the appointment you want to edit or delete (for example, search for a start date or a user).
3. Click the **Section** list in the **Actions** column and select **Edit**. The *Edit Appointment* page opens.
    - When the appointment is a one-time occurrence, the *Edit Appointment* page opens and shows the One Time Appointment information
    - When the appointment is recurring, the *Edit Recurring Appointment* dialog box opens, which allows you to modify only the selected appointment, this and the following appointments, or all future appointments in the series
4. Make all necessary changes.
5. Scroll down and click **Save Appointment**.

Configure Appointment Requests

These settings enable you to identify whether you allow reps to request appointments with you through Vendormate Credentialing and how to proceed when requests are received. The rep-initiated appointment feature must be configured by GHX. Contact your Credentialing Delivery Manager if you do not see the appointment options outlined below when you edit your profile.

1. Click the user name icon at the top right of the menu bar and select **My Profile**. The *Contact & Personal Information* page opens.
2. Click the **Edit** subtab.
3. Select the relevant appointment checkboxes.

Checkbox	Description
Available for Appointment	Select to allow reps to request appointments with you. Reps will see only your name, not your email address.
Auto Accept Appointment	Select to automatically accept appointments.
Receive Email Upon Appointment Request	Select to request that the system send you an email message with details about the requested appointment.
Receive Email Upon Appointment Sign In	Select to request that the system send you an email message when reps print their badges for an appointment.

4. Complete all required fields.
5. Click **Save**.

Manage Appointment Permissions

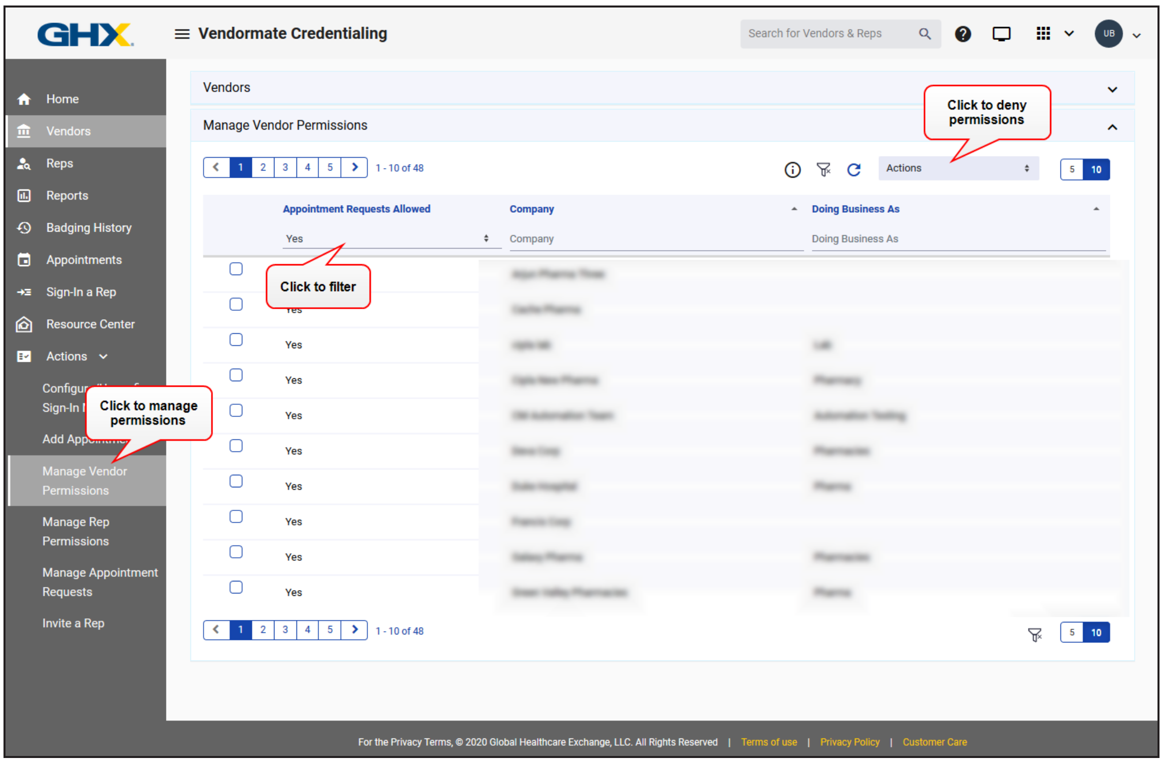
When the rep-initiated appointment feature is enabled, vendors and reps have permission to request appointments. Contact your Credentialing Delivery Manager if the rep-initiated appointment feature is not currently enabled.

You can deny permission for a specific company or individual to request appointments. Denying permission at the company level affects all reps associated with that vendor. Reps can also be denied permissions on an individual basis.

Note: All registered vendors and reps have permission to request appointments by default.

To deny permission to vendors:

1. Click **Actions** in the menu on the left to display the options.
2. Click **Manage Vendor Permissions**. The *Manage Vendor Permissions* page opens.



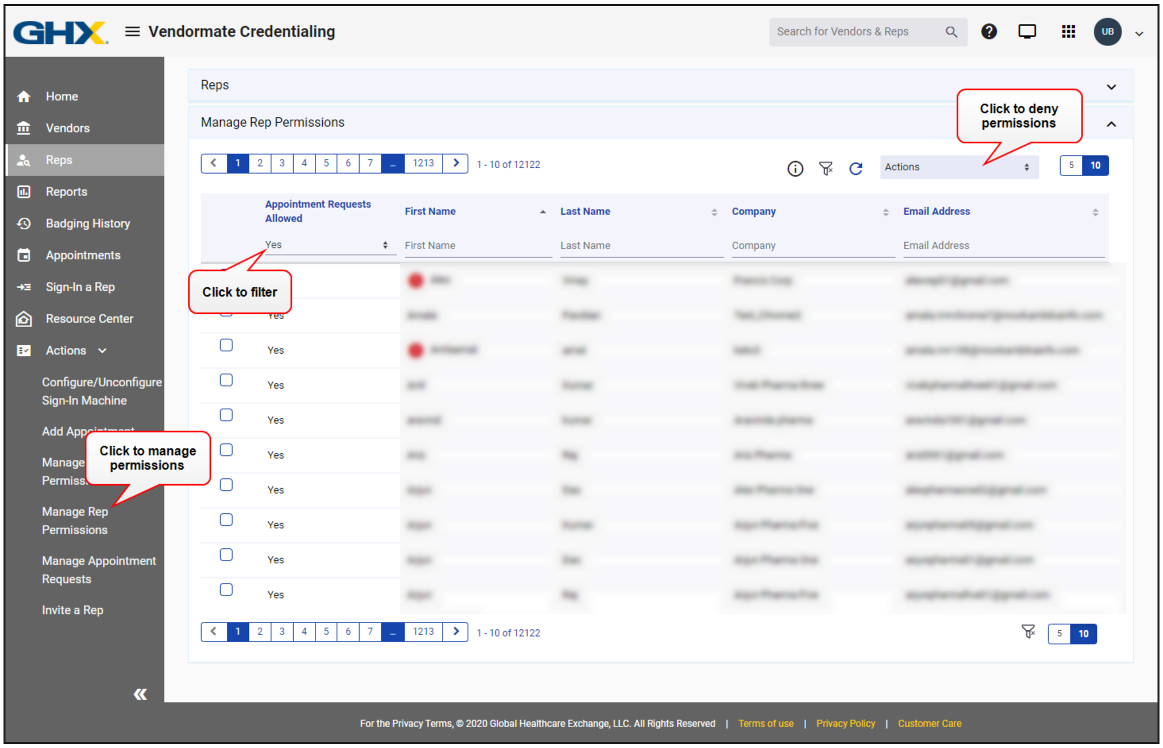
3. Search for the vendor.

Tip: If the vendor is not listed, check to see if the filter in the Appointment Requests Allowed column is set to No. If it is, change the filter to Yes.

4. Click the checkbox to the left of the company name to select that vendor.
5. Click the **Actions** box to the right above the table and select **Restrict Appointment Requests**.

To deny permission to reps:

1. Click **Actions** in the menu on the left to display the options.
2. Click **Manage Rep Permissions**. The *Manage Rep Permissions* page opens.



3. Search for the rep.

> Tip: Reps must be registered to be visible in this list or to request appointments. If the rep is not listed, check to see if the filter in the Appointment Permissions Allowed column is set to No. If it is, change the filter to Yes.

4. Select the checkbox to the left of the rep name.
5. Click the **Actions** box to the right above the table and select **Restrict Appointment Requests**.

Manage Appointment Requests

When you receive an appointment request through email, you need to respond through Vendormate Credentialing.

1. Click **Actions** in the menu on the left to display the options.
2. Click **Manage Appointment Requests**. The *Manage Appointment Requests* page opens.
3. Select one or more request checkboxes
4. Click the **Actions** box to the right above the table and select one of the following options.

Action	Description
Accept	The appointments are scheduled in the system and the requester is notified through email. If compliant, the rep will be able to sign in at a badge station within two hours of the appointment.
Decline	The appointments are not scheduled and the requester is notified through email. Filter by status on the **Appointments** page to find previously declined appointments.
Edit	This option allows the appointment to be altered before being scheduled in the system. After the appointment is saved, the rep associated with the appointment request is notified through email. The rep can sign in at a badge station within two hours of the appointment.

Help Vendors Sign In

When reps need assistance signing in for an on-site visit, you can handle the task for them. This situation may occur when a rep is not familiar with the process or if that rep is not registered or compliant at your facility. In most cases, reps should use the sign-in computers or kiosks.

Sign Vendors In

Caution: Do not include patient information in any of these fields.

1. Click **Sign-In a Rep**. The *Vendor Representative Sign In / Sign Out* page opens.
2. Type the rep's email address in the **Corporate Email** field and click **Find Vendor Information**.
    - If found, the rep is registered and the Name, Phone, and Company fields auto-populate
    - If not found, the rep is not registered and you must type the information in the **First Name**, **Last Name**, **Phone**, and **Company** fields
3. Complete the fields in the **Purpose of Visit** area. Required fields are marked with an asterisk *.
4. Leave the **Enforce <health system> Badge Rules** checkbox selected to ensure your access restrictions are enforced. For an unregistered rep's first visit, you may click the **Print Guest Pass** button. This information will be captured in the Badging History.

    Note: When the rep is not in compliance with the policies established through your credentialing program, the badge may not print. Speak to your manager to determine if you are allowed to override the policies to print a badge. See Rep Profile for more information on viewing compliance details.

5. Click **Print Rep Badge**.

Sign Vendors Out

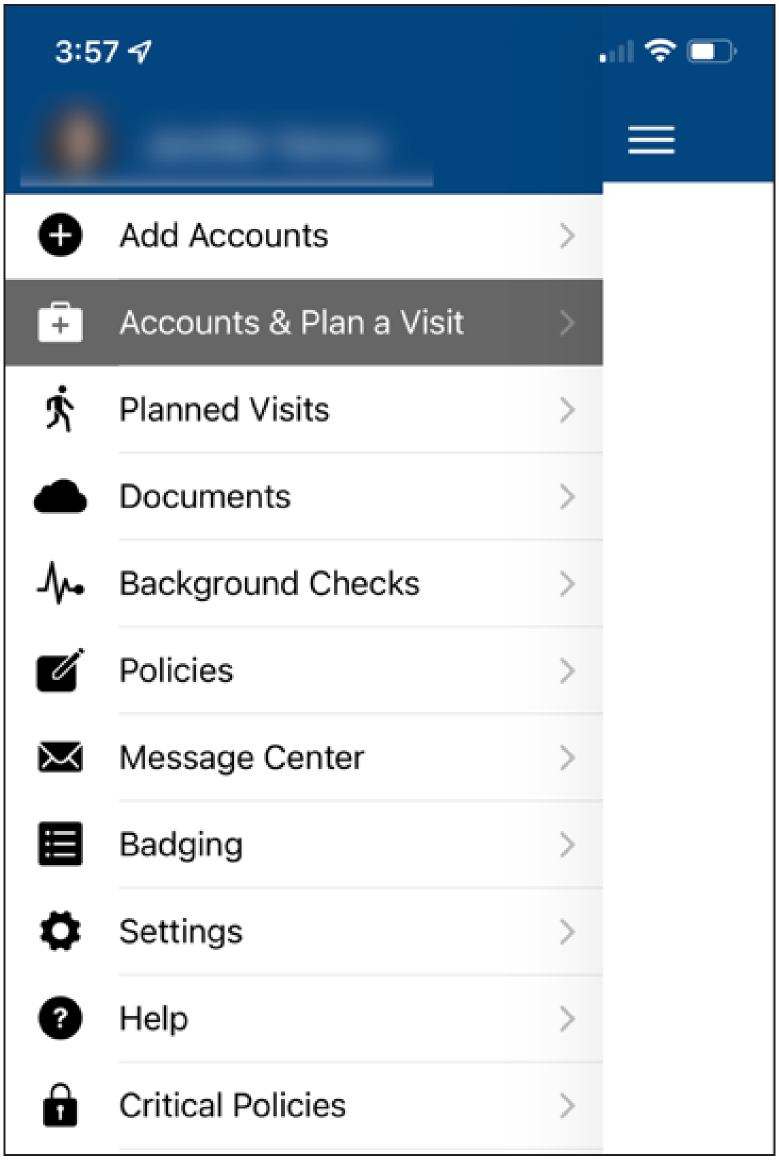
Reps can sign themselves out using the free mobile app or the dedicated sign-in computer or kiosk at the facility. Use the following steps when reps require assistance.

1. Click **Sign-In a Rep**.
2. Enter the rep's badge number in the **Vendor Sign Out** area.
3. Select the location from the drop-down list.
4. Click **Sign Out**.

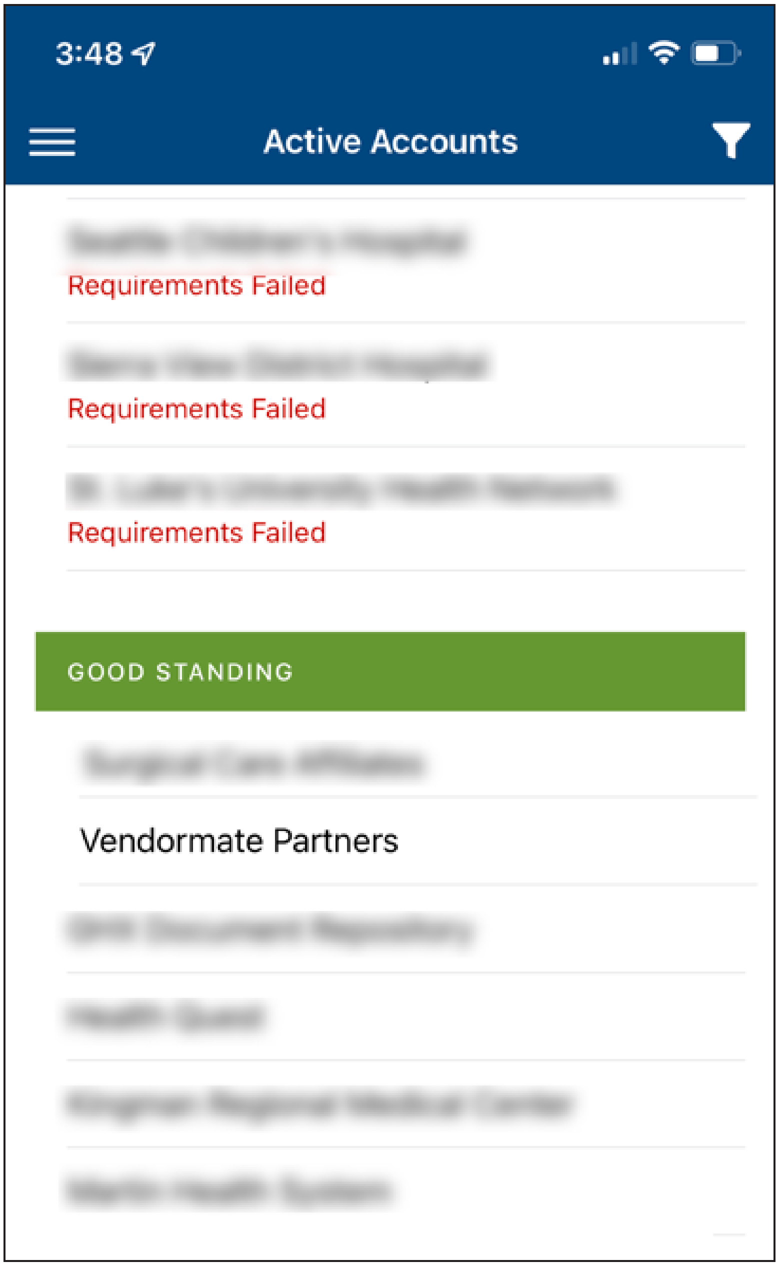
View Rep Mobile Badging Process

You may find it helpful to know what the vendor reps see when they use the mobile app. Here are the steps:

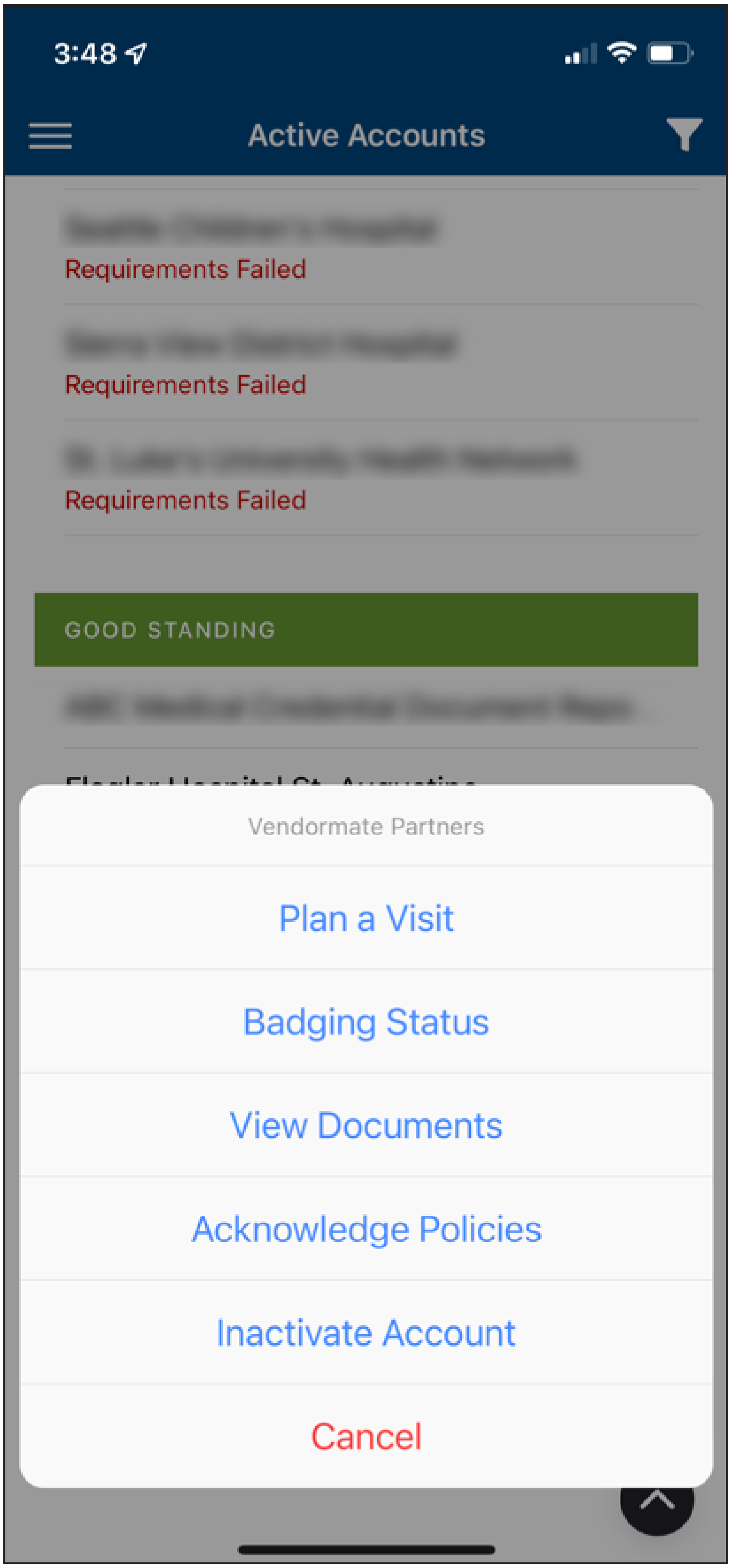
1. Open the app.



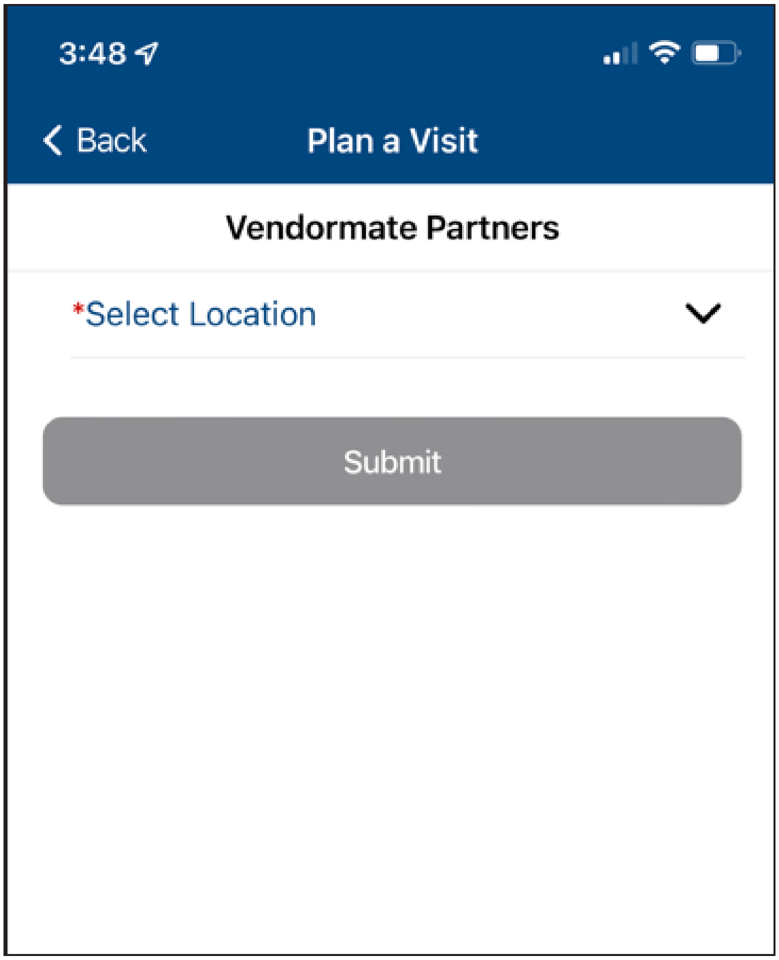
2. Select the desired health system from the Accounts screen.



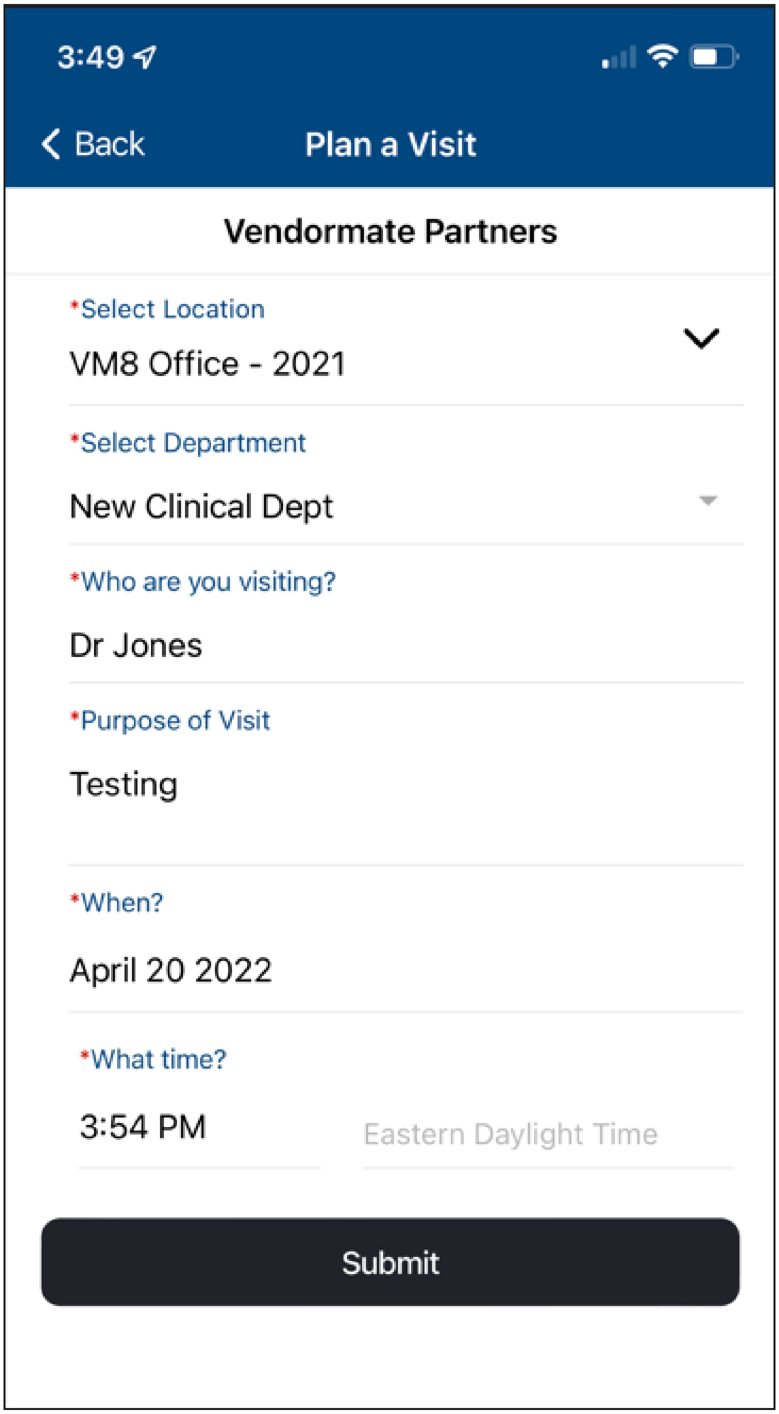
3. Click **Plan a Visit**.


3:48
Active Accounts
Requirements Failed
Requirements Failed
Requirements Failed
GOOD STANDING
Vendormate Partners
Plan a Visit
Badging Status
View Documents
Acknowledge Policies
Inactivate Account
Cancel

4. Select the desired visit location from the drop-down list.



5. Enter the visit details and click **Submit**.



6. If prompted, answer wellness declaration statements.

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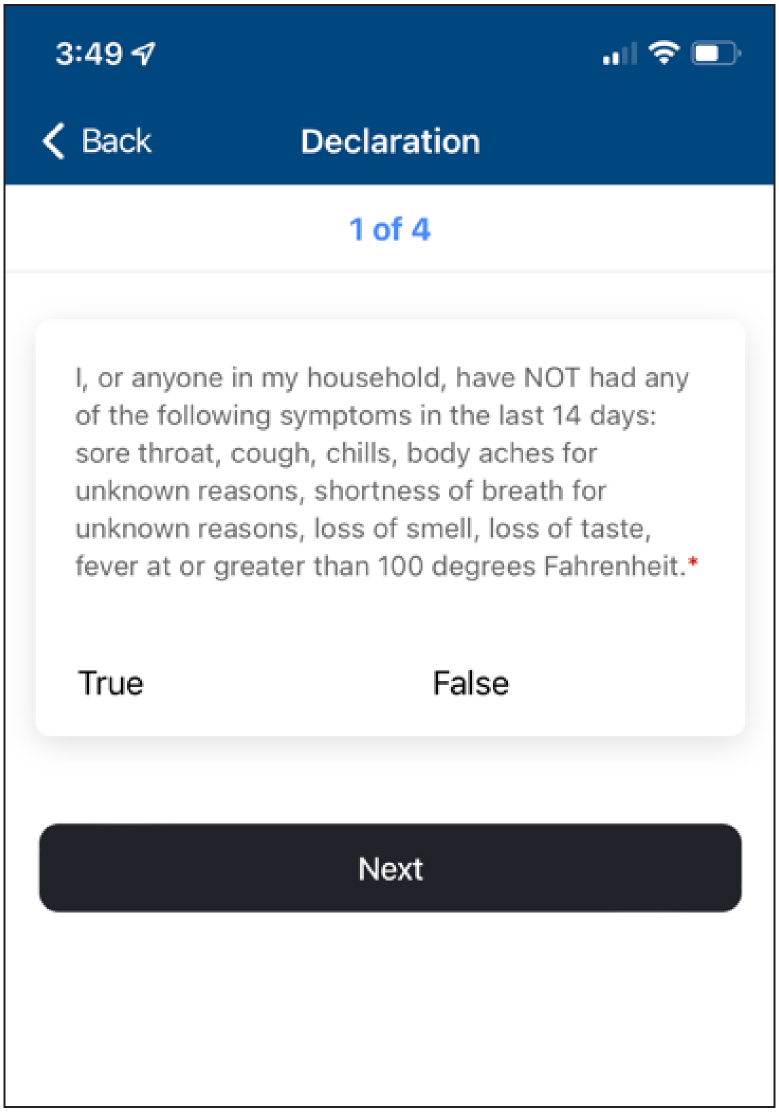
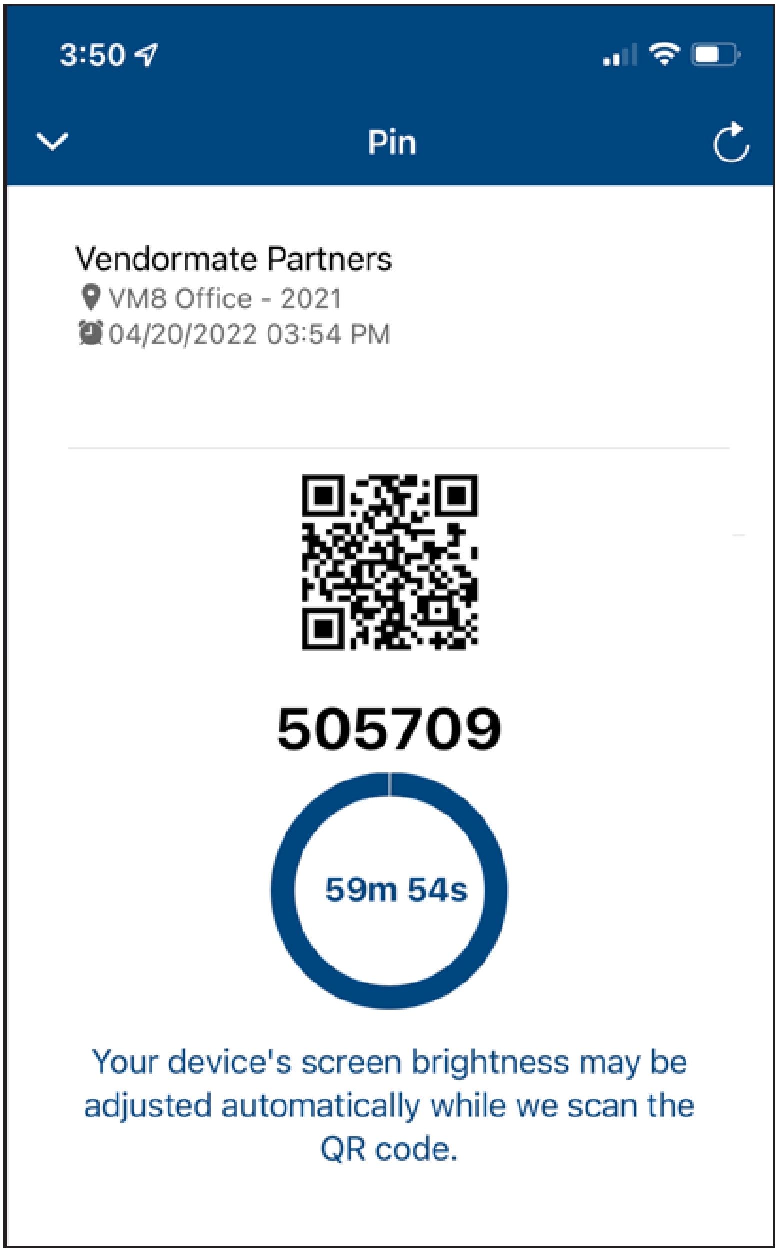


7. Enter PIN or scan QR code at the kiosk.



8. Affix badge and visibly wear during visit.

Resource Center

The Resource Center is a place for GHX and health systems to make important information available to users. Documents such as user guides, FAQs, and credentialing reminders are available here with a single click. Administrative information, including new software capabilities, are viewable by administrators.

If you are interested in adding content to the Resource Center for your organization, please send your request to the Provider Credentialing team at credentialing@ghx.com. GHX will upload the material to your organization's repository and add a link under the appropriate heading on your Resource Center page.

1. Click the **Resource Center** tab. The following sub-tabs are available.

Tab	Description
Global Admin Resources	This tab contains information for administrative users and may include kiosk printer instructions. GHX provides this content.
Global User Resources	This tab includes links to product guides, technical information and more. GHX provides this content.
Healthcare System Admin Resources	This tab includes information for administrative users. Your health system provides this content.
<health system> User Resources	This tab includes information for users. Your health system provides this content.
Health System Policies	This tab contains links to policy documents related to your health system. Your health system provides this content.

2. Scroll to the right and click the icon to expand the tab.
3. Point to a link to view a brief description in a tooltip.
4. Click a link to open the resource.

Note: Health systems have a variety of policies and requirements, especially in regards to flu, COVID, and other vaccination documents. Seasonal requirements add even more complexity. Vendormate Credentialing helps keep this wide array organized and helps to ensure that suppliers comply with your health systems' requirements. Not sure how to make updates or need help? Please contact the Compliance Solutions Specialist team at credentialing@ghx.com.

Administration

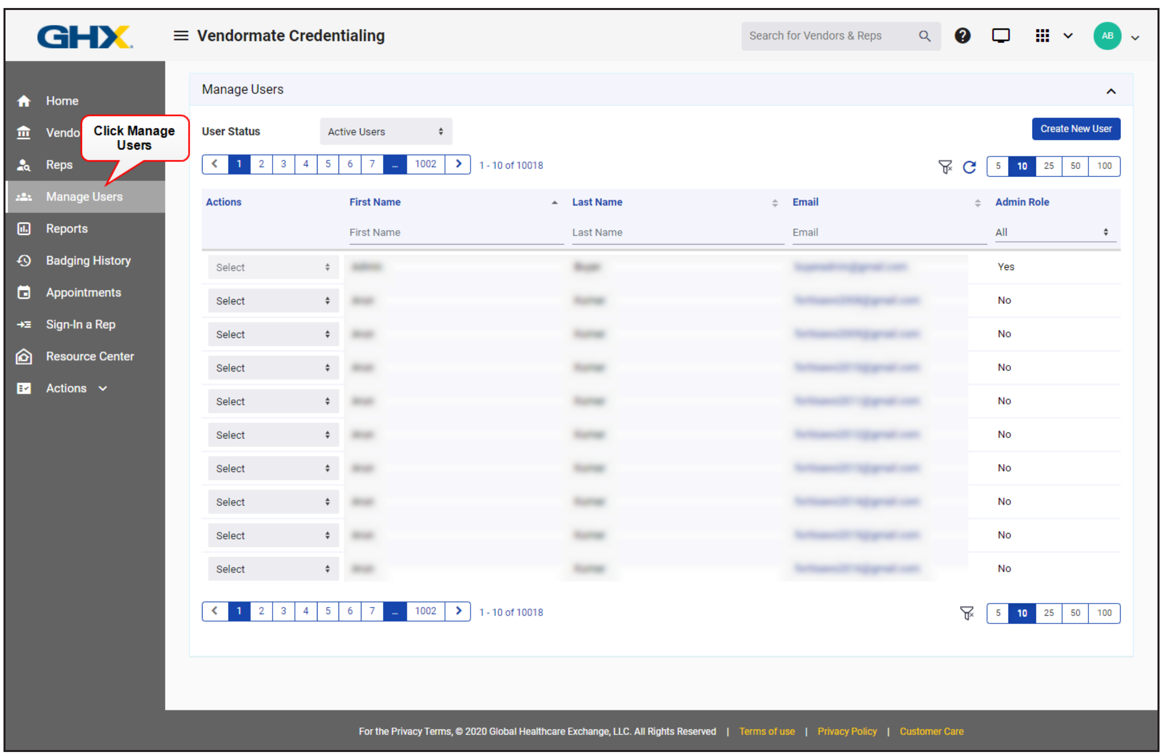
Admin users can do the following tasks from the Manage Users menu option:

- View existing users
- Create new users
- Edit existing users
- Activate and inactivate users

Non-admin users will not see this menu option.

View Users

1. Click **Manage Users**. The *Manage Users* page opens.



2. Click the User Status filter to view active or inactive user profiles.

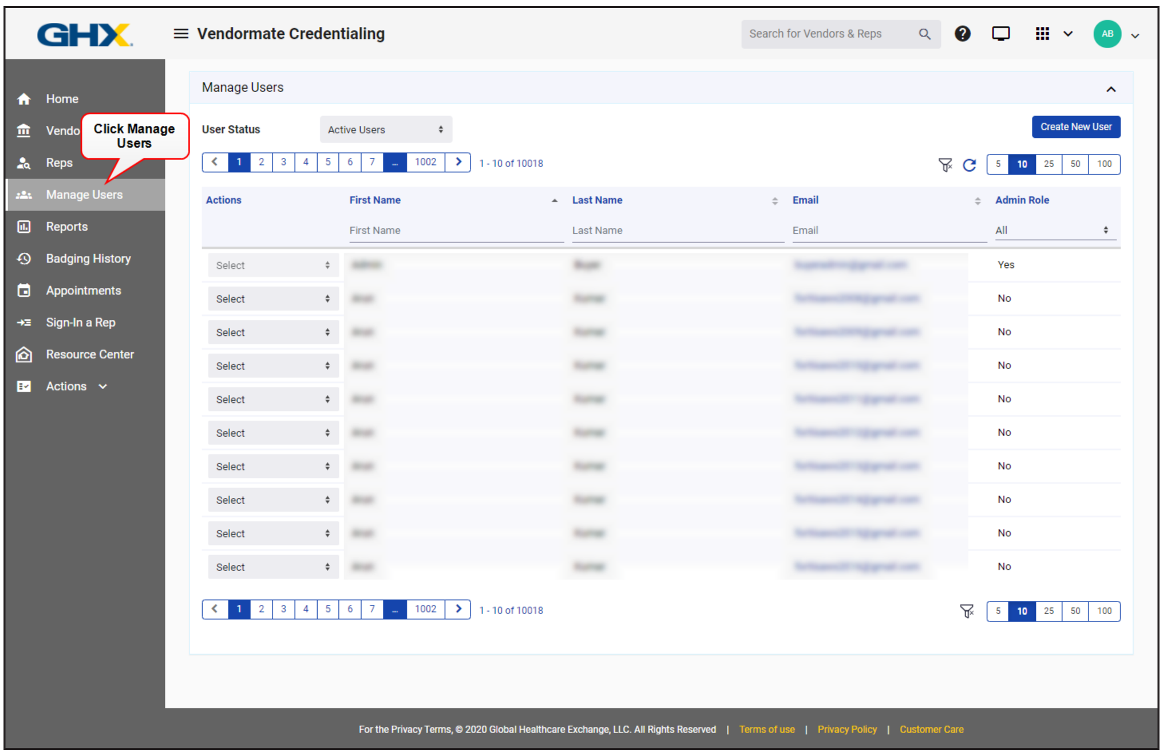
> Tip: Active users display by default.

3. Enter search terms in the column header search fields to find specific users.
4. Click the icon to clear the filters.

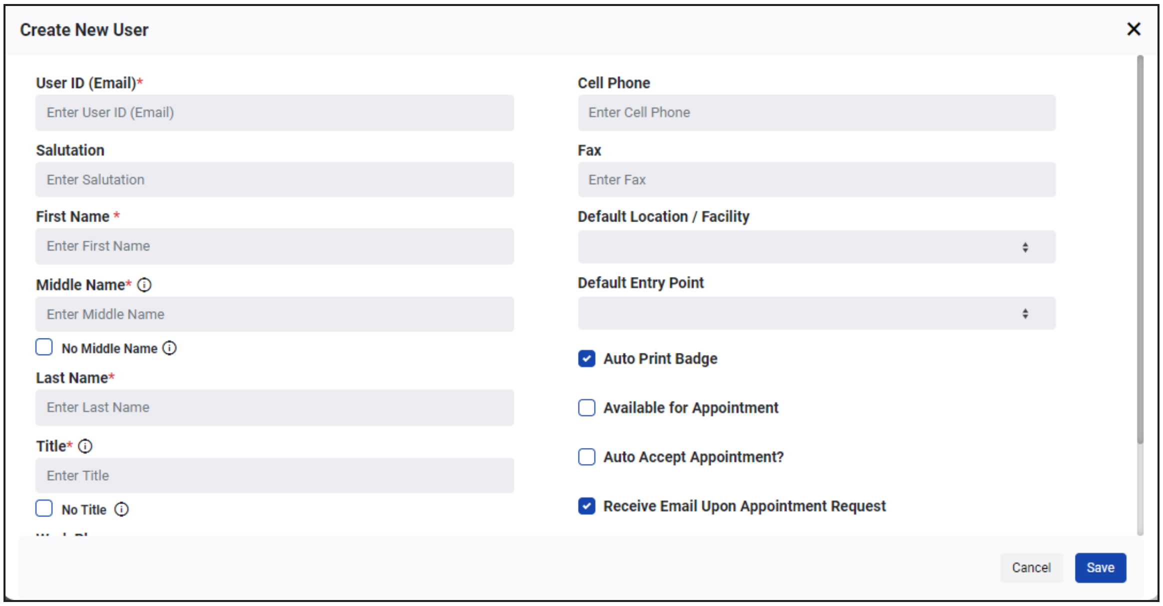
Create Users

Tip: Admin users can create user profiles. To create a new user profile, first create the profile in Vendormate Credentialing and then create an account in GHX User Management.

1. Click **Manage Users**. The *Manage Users* page opens.



2. Click **Create New User**. The *Create New User* dialog box opens.

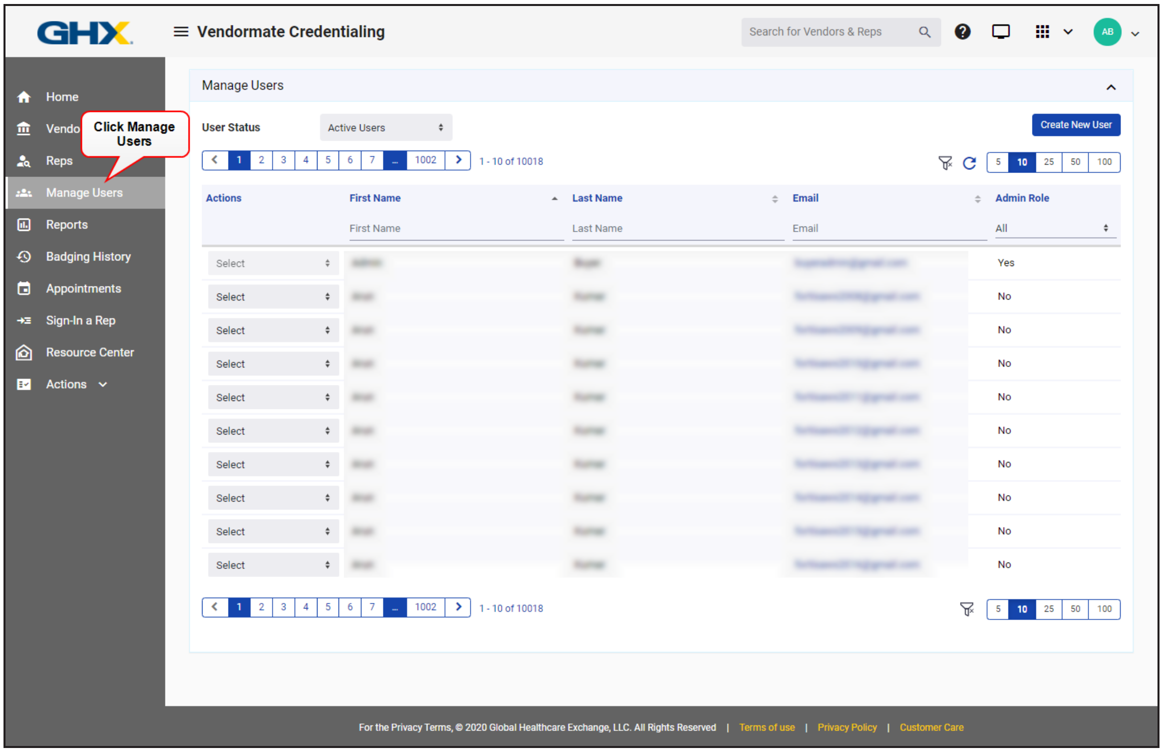


3. Type details about the new user. Required fields are marked with asterisks.
4. Click **Save**. The system automatically sends an email message to the new user that contains the first time log in information.

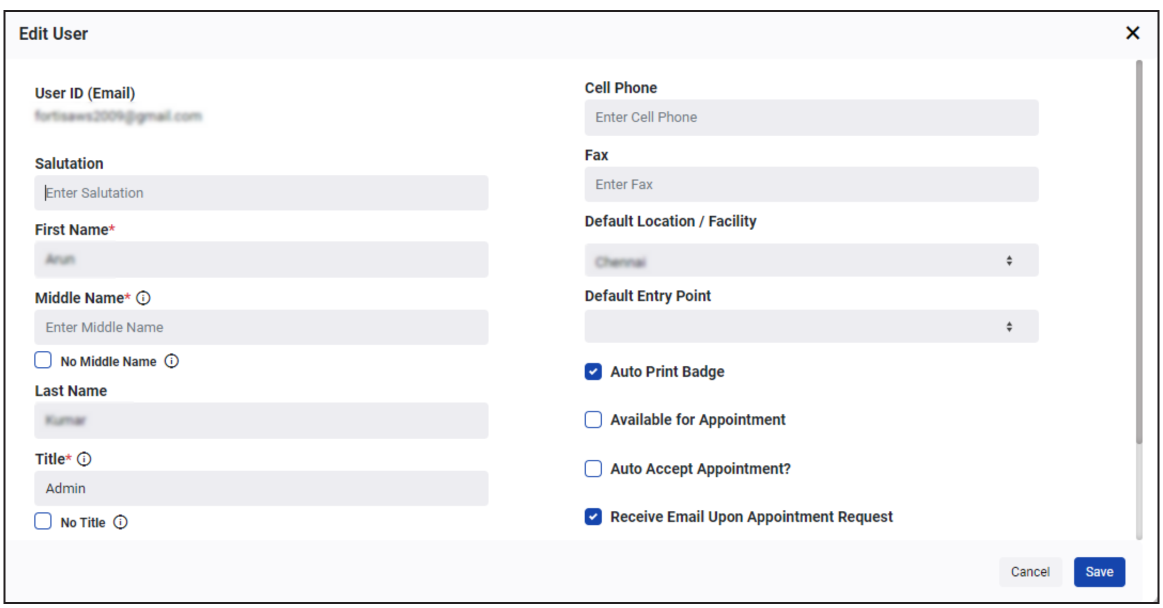
Edit Users

Admin users can edit only active user profiles (not inactive).

1. Click **Manage Users**. The *Manage Users* page opens.



2. Click the User Status filter and select **Active User**.
3. Search for the user profile.
4. Click Select in the **Actions** column and select **Edit User**. The *Edit User* dialog box opens.



5. Enter changes and click **Save**.

Activate and Inactivate Users

Activating users grants them access to Vendormate Credentialing and inactivating users revokes that access.

1. Click **Manage Users**. The *Manage Users* page opens.
2. Search for the user profile.

   Tip: Click an option in the **User Status** to filter profiles by active and inactive status.

3. Click Select in the **Actions** column and select an option. Options are:
   - For active users, select **Inactivate User**
   - For inactive users, select **Activate User**

Videos

Click here to view the portfolio or click the individual links below to see a video and access eLearning modules.

Title	Description	Duration
Vendor Registration	Vendor Registration chart features	>1 min.
Vendor Compliance	Vendor Compliance chart features	>1 min.
Rep Compliance	Rep Compliance chart features	>1 min.
Recent Badging and Trends	Information ab out recent badging and other trends	>3 min.
Appointments	View your next 10 appointments, review requests, etc.	>1 min.