



The Medical Device Rep's Hospital Credentialing Checklist

Everything you need to keep current so you're never turned away at the door

If you've ever shown up for a case and gotten stopped at the vendor desk because something expired, you know the cost isn't just embarrassment — it's a lost meeting, a frustrated surgeon, and sometimes a lost sale. The problem is rarely that reps don't care. It's that requirements are scattered across multiple credentialing systems, every facility wants something slightly different, and the expiration dates never line up. This checklist pulls the whole thing into one place. Work through each section, note your dates, and you'll always know where you stand before you walk in.

A quick note: Requirements vary by facility, by health system, and by which credentialing platform a hospital uses (Vendormate/GHX, IntelliCentrics/SEC³URE, symplr, and others). Treat this as your master list and confirm the exact requirements for each facility you cover — not every item applies everywhere.

1 Identity & background

The "who are you" layer. Mostly multi-year, but exclusion checks refresh more often than reps expect.

- Government-issued photo ID on file
- Criminal background check (national and/or county)
- Drug screening
- OIG / sanctions & exclusion check (OIG-LEIE, SAM.gov)
- Social Security / identity verification

2 Immunizations & health

The category that trips reps up most — almost all annual, and the dates drift apart over time.

- Influenza (flu) **ANNUAL**
- TB screening — PPD or chest X-ray **ANNUAL**
- Hepatitis B (series or titer / declination)
- MMR — measles, mumps, rubella (proof or titer)
- Varicella — chickenpox (proof or titer)
- Tdap — tetanus, diphtheria, pertussis
- COVID-19 (where still required by the facility)
- N95 respirator fit test (often required for OR / clinical access)

3 Required training

Most of this is annual recertification. Facilities often add their own modules on top.

- HIPAA / privacy training **ANNUAL**
- Bloodborne pathogens / OSHA safety **ANNUAL**
- Infection control / hand hygiene
- Fire and electrical safety
- General facility safety orientation
- Vendor code of conduct acknowledgment
- OR / sterile environment protocol (if you enter the OR)
- Radiation safety (cath labs, imaging, or a C-arm)
- Any facility-specific orientation module

4 Agreements & legal

"Sign once" in theory — but re-issued when policies change, and a missing one blocks you entirely.

- Business Associate Agreement (BAA)
- Confidentiality / non-disclosure agreement (NDA)
- Conflict of interest disclosure
- Vendor / supplier agreement acknowledgment

5 Insurance & paperwork

Held at the company level — but you're stopped if a certificate lapses, so track it like it's yours.

- General liability COI (some facilities require additional-insured status)
- Professional liability / errors & omissions
- Workers' compensation
- Auto insurance (if driving on facility business)
- W-9 on file

6 Per-system & per-facility registration

Where reps lose the most time — the same credentials re-entered into different platforms, plus facility-specific extras. Confirm you're registered and active in each system a facility requires.

- Vendormate / GHX
- IntelliCentrics / SEC³URE
- symplr Access
- Green Security
- HealthTrust VPro
- Verisys
- ProTech Compliance
- RegComp
- Other: _____
- Facility-specific photo badge issued
- Department-level access approved (OR, cath lab, sterile processing, etc.)
- Annual facility renewal completed

YOUR TRACKING SHEET

For each credential, four things matter: when it was issued, when it expires, how much lead time you need to renew, and where the proof lives. Fill this in and your whole status is visible at a glance.

Credential	System / facility	Issued	Expires	Renew by	Doc saved?
Flu vaccination					
TB screening					
HIPAA training					
Bloodborne pathogens					
Background check					
General liability (COI)					
BAA					

THREE HABITS THAT KEEP YOU DOOR-READY

Renew on a calendar, not a crisis

Set reminders 30-45 days before each expiration, not the week of. Anything needing a doctor's visit (TB, flu, titers) takes lead time you won't have if you wait.

Keep one folder for everything

A single place — physical or digital — with every current document. When a new facility asks for proof, you're not digging through email.

Check before you drive

Before any first visit, confirm you're green in *their* system specifically. Being current in one platform doesn't mean you're cleared in another.

Tired of tracking all this by hand? **BadgeWarden** does it for you.

One dashboard standing guard over every credential across every system — with automatic reminders before anything expires, so you're always ready to walk in.

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