

ANNEX H

Vendor Questionnaire: Important Considerations for Service Contract Negotiations

Laboratories should ask vendors the following questions:

QUESTIONS	YES	NO
Equipment Installation		
Are there pre-installation checklists and specifications provided by the vendor to assist staff with equipment familiarity, space and heat requirements?		
Is there a pre-installation site visit to address all physical requirements (e.g., space, power, heat output)?		
Are user manuals available that staff can utilize?		
<ul style="list-style-type: none"> • Are the user manuals translated into local language? (Note: CD-ROMs in laboratories without computer capabilities are not an acceptable resource.) 		
Can the vendor perform all instrument validations for the equipment?		
Can the vendor assist with the development of reference ranges for the laboratory?		
Is there a final installation checklist completed and given to the customer with supporting documentation?		
Is all documentation provided in a notebook for laboratory QA?		
Service and Maintenance		
Is the expected mean time between failures for the equipment and uptime defined in the contract?		
Is the acceptable response time for phone support, including callback time and on-site support defined in the contract?		
<ul style="list-style-type: none"> • Are there penalties/reimbursement in the service contract when service response time is not met? 		
Is there a hierarchy defined in the contract for problem resolution when vendor support is unsatisfactory?		
<ul style="list-style-type: none"> • Are the contract-defined communications channels between the user and the manufacturer stated in the contract? 		
Are all operators' manuals, including troubleshooting and maintenance, provided to the laboratory by the vendor?		
Does the maintenance/service manual include basic troubleshooting suggestions with flags or alerts?		
Is the frequency of vendor-initiated preventative maintenance visits defined in the service contract (usually quarterly or every 6 months)?		
Has the service technician assigned to the area been adequately trained to support the specific equipment?		
Is there a checklist performed by the technician prior to ending a service call to prove that the equipment is functioning at an acceptable level?		
<ul style="list-style-type: none"> • Is a copy of the checklist provided to the customer? 		
Does the contract provide for replacement or loaner equipment in the case of equipment failure?		
Is there support available for replacement parts that are shipped and to be		

installed by staff?		
Is there a mechanism for tracking and receiving replacement parts?		
Are the hours of operation for the hotline included in the contract?		
<ul style="list-style-type: none"> • Do the hotline hours match the lab's hours of operation? 		
<ul style="list-style-type: none"> • Is support available consistently during these hours? 		
<ul style="list-style-type: none"> • If unresolved over the phone, is action taken by the hotline to get on-site assistance and follow-up on the support? 		
Does the vendor maintain a service history according to equipment serial numbers so that all service call details can be retained and chronic issues can be identified?		
Is there a sufficient number of trained technicians to handle the laboratory's territory?		
<ul style="list-style-type: none"> • Is back-up coverage provided if the assigned technician cannot arrive within the defined response time? 		
Does the technician provide to the customer written information relating to the service call?		
Is the response time for an unresolved issue on a service call defined in the contract?		
Reagent Acquisition		
Can the vendor provide delivery with adequate lead time to minimize stock-outs?		
<ul style="list-style-type: none"> • Is the vendor able to supply a continuous supply of reagents, calibrators and controls? 		
Do the initial supplies sent for training have sufficient expiration dates to continue operation until the standing order is in place or are other arrangements made?		
Is the system an open system?		
<ul style="list-style-type: none"> • Have all reagents been validated on the system if open? 		
Can the laboratory negotiate reagent/consumable pricing based on consolidated volumes for all equipment?		
Is there a complete ordering inventory document given by the vendor (catalog numbers of parts and reagents needed for the system)?		
Is it possible to arrange for standing orders for reagents?		
<ul style="list-style-type: none"> • Can the vendor help with forecasting reagent needs based on volumes? 		
<ul style="list-style-type: none"> • Can standing orders be adjusted quarterly to account for changing volumes? 		
Does the contract describe the costs associated with reagents not used/needed (applied to account or not refundable)?		
Equipment Training		
Does training for computerized equipment meet staff needs (level of computer proficiency)?		
Is training customized for different sites?		
Is training tailored to meet staff competencies in laboratory practice? Does training include:		

<ul style="list-style-type: none"> • Dry run of a call to the hotline to help learn what information must be readily available during call (e.g., serial number, callback number)? 		
<ul style="list-style-type: none"> • Maintenance and troubleshooting procedures including staff performance with limited guidance? 		
<ul style="list-style-type: none"> • Documentation of maintenance performed using vendor supplied logs? 		
<ul style="list-style-type: none"> • Performance of both random and multiple tests for batch analysis? 		
Is the effectiveness of training measured?		
Are all necessary reagents, controls, calibrators, consumables and reagent holders available on-site at the time of validation and training?		
<ul style="list-style-type: none"> • If not, will they be available during training or during a follow-up visit to ensure correct usage? 		
Support After Installation		
After installation, will the vendor representative visit the site? (How often?)		
After installation, will the vendor representative check-in by phone? (How often?)		
After installation, will the vendor respond to calls from the users? (How quickly?)		
Other		
Does the vendor offer external peer comparison programs?		
<ul style="list-style-type: none"> • Are the reports timely enough to be used effectively? 		
<ul style="list-style-type: none"> • Is there an additional charge to use these reports? 		
If the customer is part of the peer comparison program, does the vendor review external QC data submitted by the customer and supply some feedback regarding the data?		
If the customer is interested in participating in the peer comparison program, is it organized and operational during on-site training?		
Does the equipment include a QC data management package?		
<ul style="list-style-type: none"> • To what extent must staff use additional resources to monitor QC on a daily and monthly basis? 		
Are Material Safety Data Sheets (MSDS) provided for all hazardous chemicals?		