VendorStat Scheduling Guide

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Getting Started

- Open Internet Explorer and go to www.vendorstat.com.

- If you already have a VendorStat account, log in and proceed to "Today's Visits".

- If you don't have a VendorStat "Scheduler" account, you will need to create this now.

Create a Scheduler Account

Click on the "New to VendorStat? Get Started Now" link.

Create a Scheduler Account

Click on "Health System Scheduler Registration"
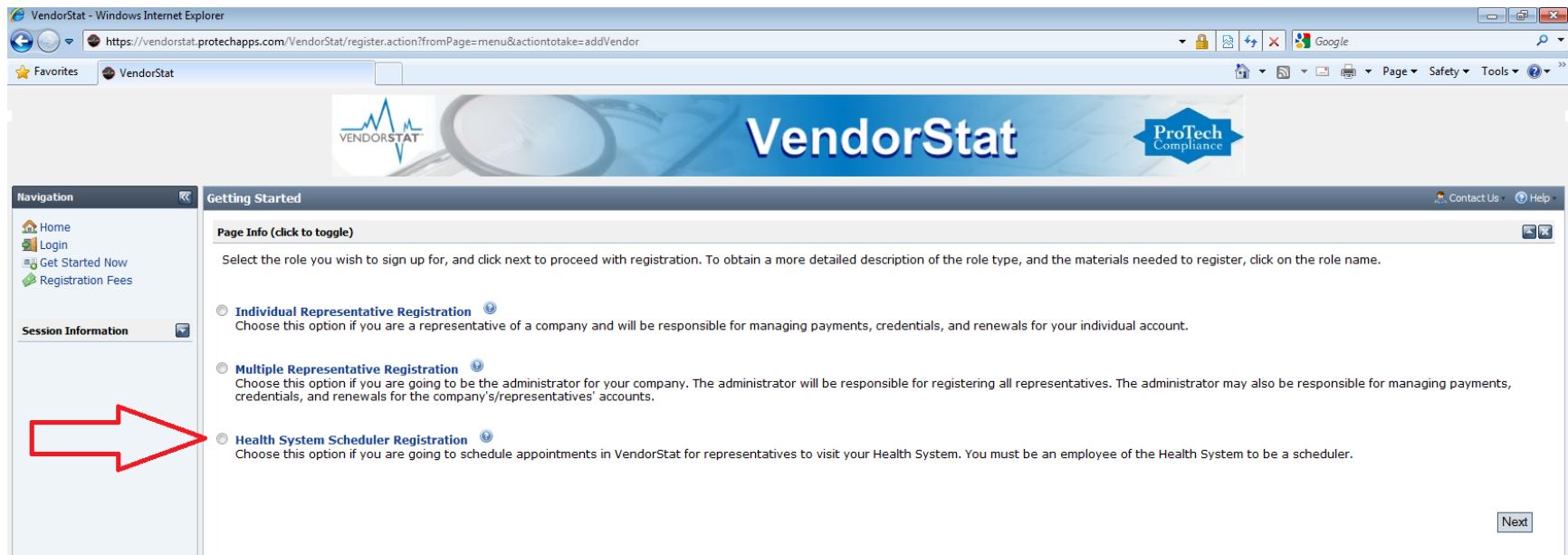
Click "Next"

Create a Scheduler Account

Enter the required personal information, including four (4) security questions and answers.

Note: *In order to create a Scheduler account, you must use your official Health System email address. If you do not have an email address, or are not sure which email address to use, please call your local IT Help Desk or ProTech Compliance Customer Service Center at 877-710-7828, Monday-Friday, 8:00 am – 5:00 pm EST.*

Create a Scheduler Account

Once you click "Create my account", an email with a temporary password will be automatically sent to the email address you registered. Once you have retrieved this password, click "Login Now".

Registration Success

✓ **Please login to continue through your registration process.**

A password has been sent to the email address that you registered with. Once you receive the email, use the password in the email and your email address (username) to login.

Login Now

Thanks for choosing VendorStat!

Create a Scheduler Account

- You will now be prompted for your email address and temporary password.

- Upon logging in, you will be asked to change your temporary password.

- Your new password must be at least seven (7) alphanumeric characters, and contain characters from at least three of the following four categories: **capital letters**, **lowercase letters**, **numbers**, and **symbols**.

- Once your password has been successfully changed, you will see the "Today's Visits" screen.

Today's Visits

This screen shows you all of the visits you have scheduled at your facility for the current day.

From this screen, you can:
- **Schedule a New Visit**
- **Search Prior/Future Visits**
- **Edit or Cancel a Visit**

Schedule a New Visit

On the "Today's Visits" screen, click on "Schedule a New Visit".
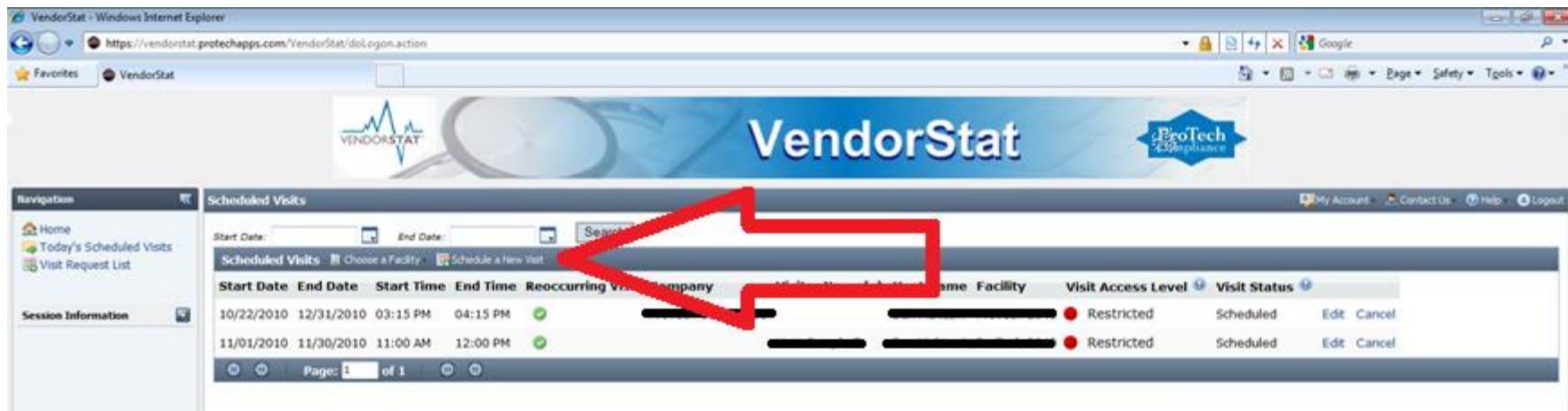
Enter Visit Information

Enter the Visit information. All fields with a red asterisk (*) require information.

Recurring Visit

If the visit is recurring, select the "Recurring Visit" checkbox. This will allow you to select how often, and until what date, the visit will recur.

Note that there is a one year maximum for recurring visits.

If you select a "Recurring Visit", the end date will automatically be set for one year after the original "Start Date".

Recurring Visit

NOTE: All visits that had been previously scheduled with "No End Date", have been updated to end one year after the original "Start Date".

Enter Host Information

- If you are scheduling the visit for yourself, you may click "Add My Information". This adds your information as the host.

- If you are scheduling the visit for someone else, enter their information.

Note: Please be sure to enter a valid email address, as both the host and the vendor will receive confirmation emails regarding this visit.

Type of Visitor

There are two types of visits: Representative Visits and Company Visits.

- If you are scheduling a visit for an individual, or scheduling the same visit for multiple individuals, select "Representative Visit" and click "Add Visitor". Proceed to "Add a Visitor – Representative Visit".

- If you are scheduling a visit for one or more vendors from the same company, select "Company Visit". Proceed to "Add a Visitor – Company Visit".
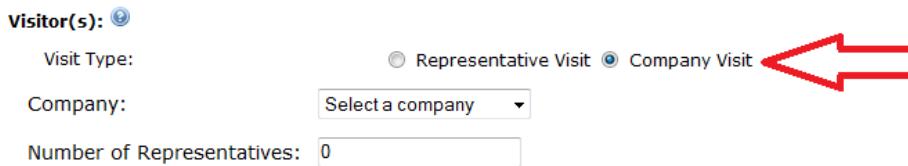
Add a Visitor – Representative Visit

In the pop up box that appears, enter either a last name, first name, company, or VendorStat ID, then click "Search".
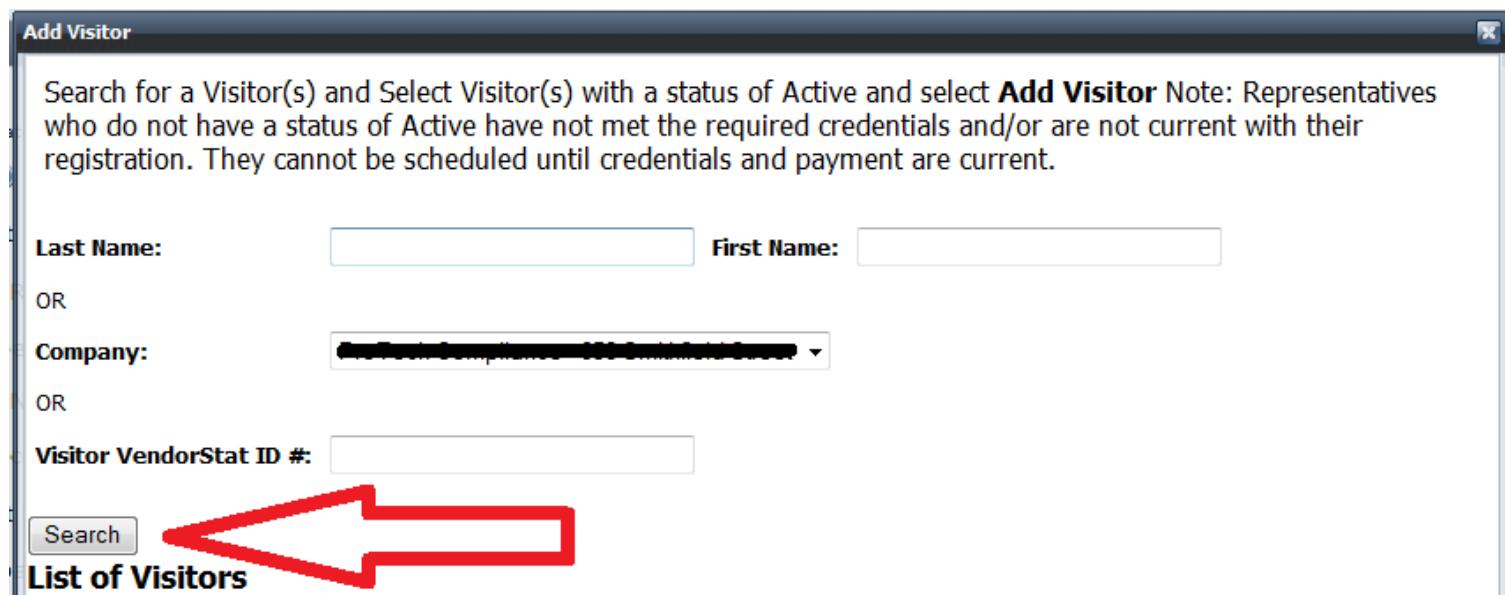
Add a Visitor – Representative Visit

- Check the box beside the vendor(s) that you want to schedule.

  Note that vendors with "**Incomplete**", "**Banned**", or "**Suspended**" statuses *cannot* be added to a visit. If your representative does not have **Active** status, advise the representative to log into their account and complete all outstanding credentials and payments. If they have any questions, they can contact **VendorStat customer service at 877-710-STAT (7828).**

- Click "Add Visitor".

Add a Visitor – Representative Visit

- Confirm that your visitor(s) has been added by the red text which appears at the top saying "Visitor(s) Added".

- Click Close.
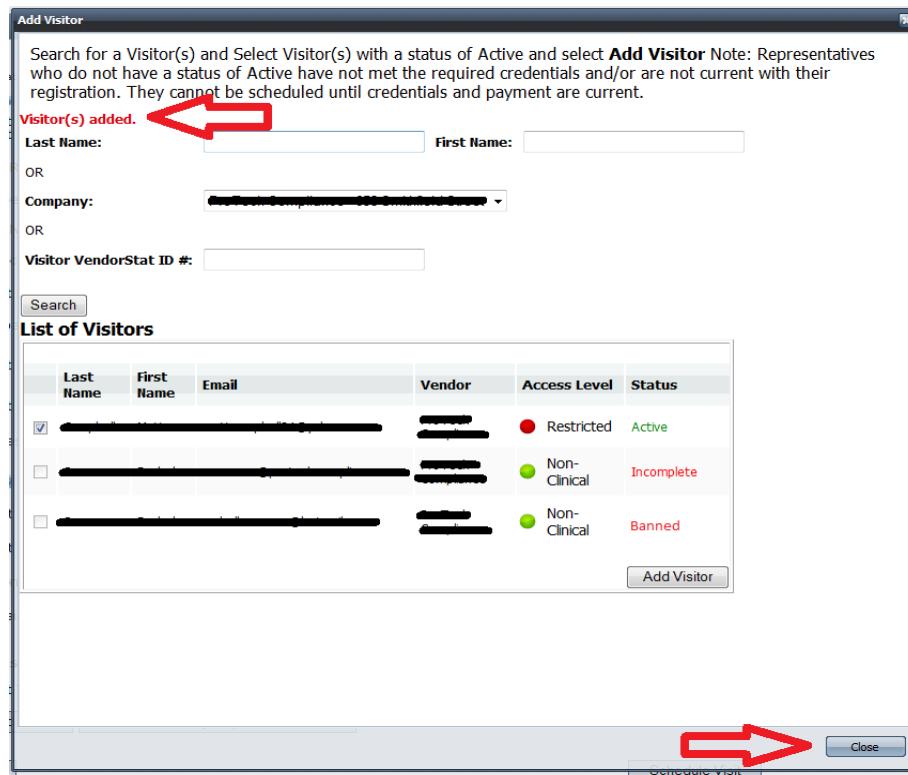
Confirm and Schedule – Representative Visit

- Confirm that the visitor(s) you want to schedule are listed under "Visitors".
  - If you selected the wrong vendor, you may also click "Remove Visitor" on this screen.
- Once all of your details are confirmed, click "Schedule Visit".

Add a Visitor – Company Visit

Select the company you want to schedule for a visit, and enter the number of representatives that will be scheduled.

Confirm and Schedule – Company Visit

- Confirm the details of the company visit, including the company name and correct number of representatives.

- Click "Schedule Visit".

Visit Registration Summary

- Your visit is confirmed when you see the "Visit Registration Summary Page".

- This page confirms that the visit has been scheduled, and both the host and the visitor(s) have been emailed a copy of the visit.

- From this screen, you can choose to print the confirmation page or schedule a new visit.

Visit Registration Summary

Page Info (click to toggle)

Your Visit has been scheduled.

- ✅ Visit successfully created.
- ✅ Email confirmation successfully sent.

Please print this page for your records [Print]

[Schedule New Visit]

Visit:

Visit Start Date/Time:	11/05/2010 09:00 PM
Visit End Date/Time:	11/05/2010 11:00 PM
Visit Building/Location:	▬▬▬▬▬
Department:	▬▬
Visit Destination/Information:	
Visit Purpose:	▬▬▬
Access Level Needed for this Visit:	🔴 Restricted

Host:

Name:	▬▬▬▬
Phone:	▬▬▬▬
Email:	▬▬▬▬

Visitor(s):

Company:	▬▬▬▬
Number of Visitors:	4

Search for Visits

- If you would like to find visits from previous or future dates, enter the dates you would like to search and click "Search".

- All visits that you scheduled for your specific facility will appear.
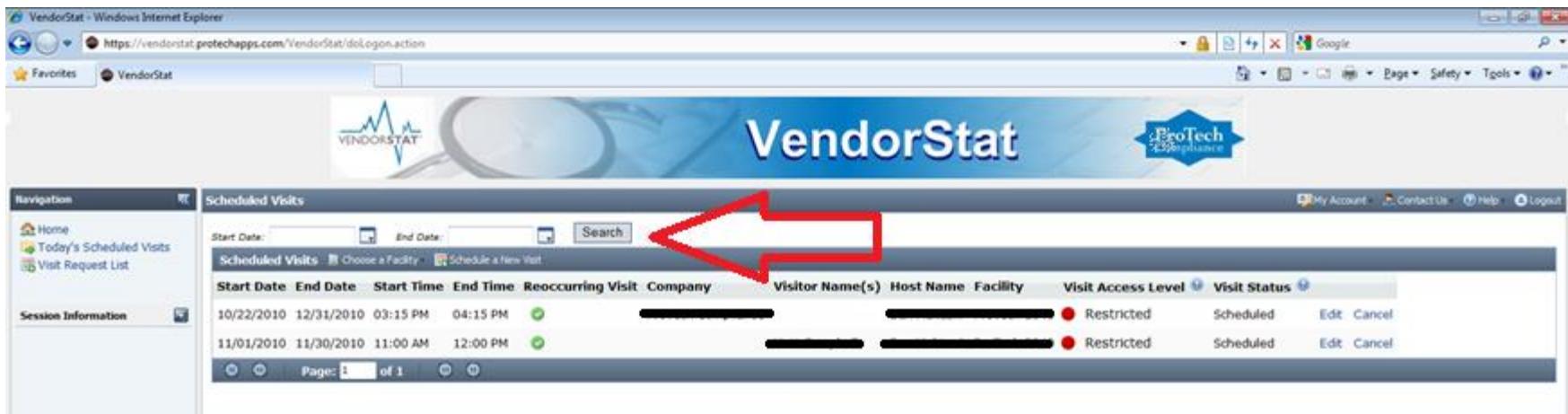
Edit or Cancel a Visit

You have the option to edit or cancel a visit that you have previously scheduled.

Edit a Visit

If you click "Edit", you will see the same screen you filled out when you scheduled the original visit. Make all necessary changes, then click "Update Visit".

Cancel a Visit

- If you decide to cancel the visit, enter the cancellation reason and click "Yes".

  Note that a cancellation reason is *required*.

Visit Request List

- The Visit Request list can be found by clicking "Visit Request List" on the left panel.
- This page shows a list of vendors who have requested visits. From this page you can:
  - Approve Visits
  - Change Visits
  - Deny Visits
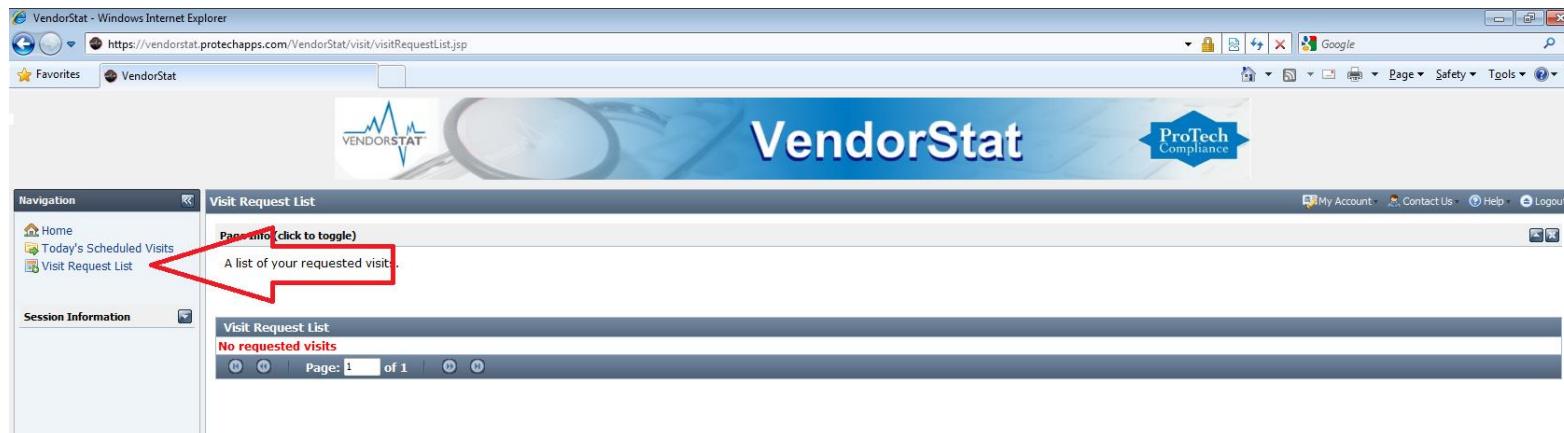
Approve Visit Request

- Click "Approve" beside the visit you want to approve.
- Your screen will refresh and the visit will be approved.

Change Visit Request

- Click "Change" beside the visit you want to change.


- Change the necessary details, then click "Change Visit Request".
  - Note: Clicking on "Change Visit Request" will also approve the request.

Reject Visit Request

- Click "Reject" beside the visit you want to reject.

- Your screen will refresh and the visit will be rejected.

Contact

- Please contact ProTech Compliance at

1-877-710-STAT (7828)

or

admin@protechcompliance.com

if you have any questions regarding scheduling.

We are happy to help!

VendorStat