

Indicate which policies, procedures, etc., you have, need, are optional or not applicable. Asterisk = foundational.

COMPLIANCE PROGRAM OPERATION	HAVE	NEED	OPT.	N/A	NOTES
*Policy on Interactions with Health Care Professionals					
*Compliance and Investigations					
Code of Conduct					
Code of Conduct Deviation Form					
Compliance Officer Job Description					
Customer Guide on Company Compliance Program					
Compliance Assessment Checklist					
Compliance Program Charter					
Compliance Committee Charter					
Risk Assessment, Auditing and Monitoring					
Compliance Hotline					
Compliance Training					
Conflict of Interest					
Responding to Governmental Inquiries/Audits					

SALES AND MARKETING	HAVE	NEED	OPT.	N/A	NOTES
*Labeling and Advertising Review					
Advertising and Promotion Considerations					
Social Media					
Press Releases					
Collaborative Marketing					
Booth Conduct					
Case Support (OR conduct, credentialing)					
Sampling, Product Evaluation & Demonstration Units					
Product Sales, Consignment, or Distributor Agreement					
Equipment Loan or Rental Agreement					

ENGAGING HCPS AND HCES	HAVE	NEED	OPT.	N/A	NOTES
*Consulting Arrangements					
*Needs Assessment for HCP Consultants					
*Anti-Corruption (Foreign Corrupt Practices Act, for O-US)					
*Grants Policy					
Consulting Agreement Template					
Advisory Boards					
Speakers Bureau					
Physician Training & Education					
Grant Request Form					
Conducting and Supporting 3rd Party Educational Programs					
Competitive Product Switch-Out					
Grants and Charitable Contributions Agreement					
Collaborative Marketing Agreement					
Charitable Contributions					
Peer-to-Peer HCP Activities					
HCP Consent and Release					

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MEDICAL/CLINICAL AFFAIRS	HAVE	NEED	OPT	N/A	NOTES
*Responding to Unsolicited Requests for Off-Label Information					
Medical Information Request Form					
Medical Information Cover Letter					
Physician/Investigator-Initiated Research					
Conducting a Notice of Availability					
Medical Affairs					
Medical Affairs Director Job Description					
Research/Data Collection					
Clinical Trial Agreement Template					
Research Agreement Template					
Physician/Investigator Initiated Trial Agreement					
Market Research					
TRANSPARENCY	HAVE	NEED	OPT.	N/A	NOTES
*Transparency Reporting (state and federal) and Gift Ban Rules					
REIMBURSEMENT, DISCOUNTING, & SALES ACTIVITIES	HAVE	NEED	OPT.	N/A	NOTES
Dissemination of Reimbursement Information					
Guidelines on How to Discuss Reimbursement					
Pricing & Discounts					
Discussing Health Care Economic Information					
PRIVACY	HAVE	NEED	OPT.	N/A	NOTES
*Policy on Protecting Patient Privacy					
Business Associate Response Letter					
Patient Consent & Release					
PATIENT CONTACT/SUPPORT	HAVE	NEED	OPT.	N/A	NOTES
Patient Support Program (policy, application forms, consent form)					
Patient Authorization Agreement					
Patient Education Activities					
Market Research					
Charity Cases					
Patient Sampling Guidelines					
Interactions with Patient Organizations					