

Healthcare RFX intake checklist

Pharmacy & specialty distribution — before the packet goes out

Use this when a category owner asks for a new event. Fill the blanks once. Then draft the RFX from one clear intake — not last year's Word doc plus an email thread.

1 · SCOPE

What are we buying?

- | | |
|--|---|
| ☐ Category (pharmacy, specialty distribution, med-surg, other) | ☐ Products / therapeutic classes in scope (and out of scope) |
| ☐ Facilities / entities covered (system, region, hospital list) | ☐ Contract type (sole source, dual, GPO-aligned, local) |
| ☐ Term + renewal / termination notes | ☐ Volume: last 12 months + next 12 months estimate |
| ☐ Current incumbent(s) and contract end date | |

2 · STAKEHOLDERS

Who decides?

- | | |
|--|--|
| ☐ Buyer / sourcing lead (name + email) | ☐ Pharmacy / clinical owner |
| ☐ Supply chain / materials management | ☐ Finance / value analysis (if in the room) |
| ☐ Legal / risk (who must review terms) | ☐ Who signs the award recommendation |
| ☐ Supplier contacts (incumbent + shortlist) | |

3 · CRITERIA

How will we score?

- | | |
|--|---|
| ☐ Must-haves (accreditation, 340B, pedigree, cold chain, fill rate) | ☐ Nice-to-haves (reporting, integration, value-adds) |
| ☐ Weights agreed before send (price vs service vs risk) | ☐ Compliance / DEA / state board constraints |
| ☐ SLA expectations (fill, OTIF, backorder, recall) | ☐ Pricing structure (WAC, ASP, tier, rebate, fee) |
| ☐ Red flags that auto-disqualify a bid | |

Working notes

Decisions, open questions, shortlist names

Before you hit send

One owner for the final intake. One shortlist. One set of weights. Suppliers get a clear packet and enough time to respond — your team should not rebuild the comparison matrix from six inboxes.

Walk a live category in 30 minutes

Bring a real pharmacy or specialty event. See intake, RFX, replies, and scoring in one place.

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