IntelliCentrics
Experience SEC³URE Healthcare

SEC³URE Host Administrator | Set Meeting Requirements

SEC³URE Meeting Generator is used to set your facility's HCIR / Rep meeting requirements and gain greater control of who is entering your facilities by requiring meeting pre-approvals. It reduces the amount of "*cold-calling*" vendor reps and provides a more direct line of communication between you, your facility employees, and your HCIR / Rep populations. You may set requirements by facility, by HCIR / Rep population, and even by individual HCIR / Rep.

Before you begin, we recommend identifying department leads responsible for approving / denying HCIR / Rep meeting requests. Next, determine the facilities, the HCIR / Rep Category(ies) populations, or individuals who need to request pre-approval before arriving on-site. And then, establish and set an appropriate minimum meeting request approval period so that department leads can reasonably respond to requests.

Features for Meeting Generator:

☐ Set Facility-wide Meeting Requirement Status

☐ Manage Minimum Meeting Request Time

☐ Set Individual Rep Meeting Requirements

☐ Manage Meeting Requests

ⓘ We recommend department leads be setup as Administrators in SEC³URE so they may approve / deny incoming meeting requests. Three-day minimum requirement: Requests not processed two days before the meeting is to occur will be automatically approved.
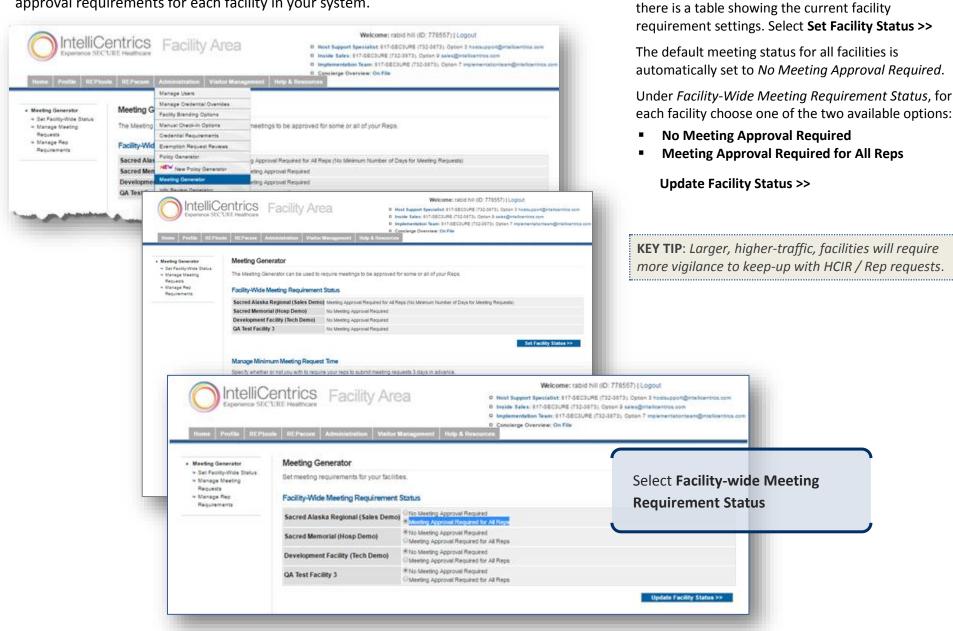
Additional Resources for Implementing the SEC³URE Meeting Manager:

📄 **SEC³URE Implementation Guide:** Set Email & Text Alerts | *PDF
This document provides guidance for designating who in your facilities should receive SEC³URE email and text alerts.

Set Facility-wide Meeting Requirement Status:

This is the first step in setting-up facility meeting requirements. You may set meeting approval requirements for each facility in your system.
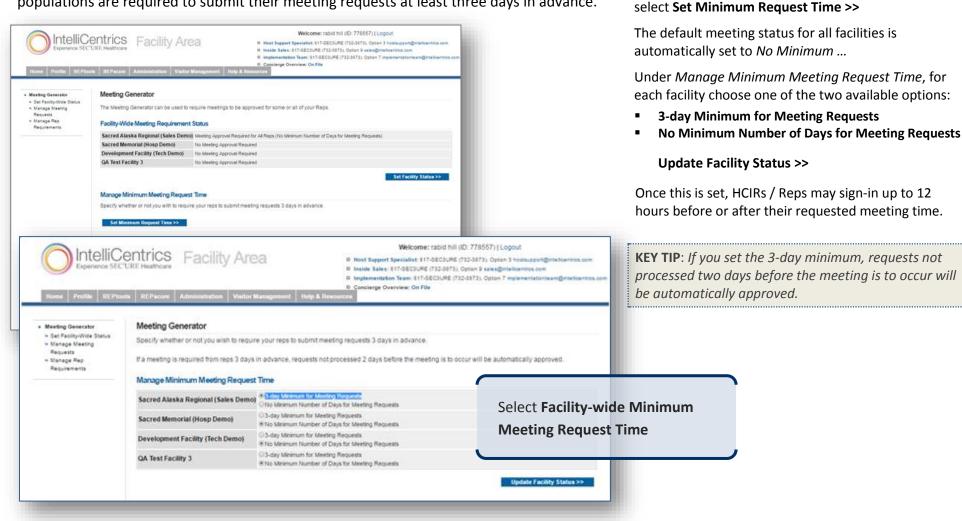

In SEC³URE, pull down the **Administration** menu and select **Meeting Generator**.

Under *Facility-Wide Meeting Requirement Status*, there is a table showing the current facility requirement settings. Select **Set Facility Status >>**

The default meeting status for all facilities is automatically set to *No Meeting Approval Required*.

Under *Facility-Wide Meeting Requirement Status*, for each facility choose one of the two available options:

- **No Meeting Approval Required**
- **Meeting Approval Required for All Reps**

  Update Facility Status >>

KEY TIP: *Larger, higher-traffic, facilities will require more vigilance to keep-up with HCIR / Rep requests.*

Select **Facility-wide Meeting Requirement Status**

Set / Manage Minimum Meeting Request Time:

The next step to setting up facility meeting requirements is to specify if your HCIR / Rep populations are required to submit their meeting requests at least three days in advance.
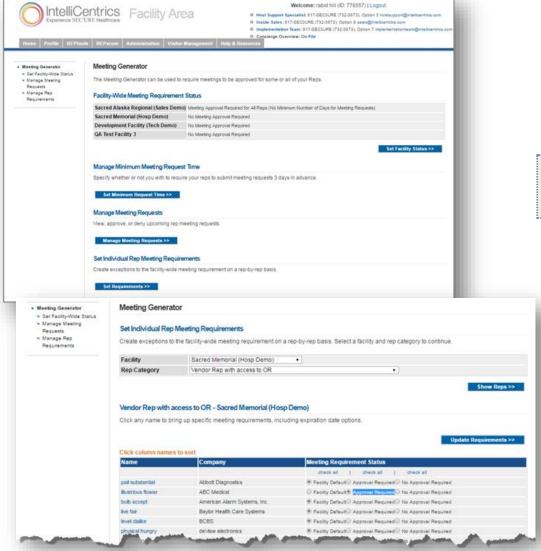

In SEC³URE, pull down the **Administration** menu and select **Meeting Generator**.

Under *Manage Minimum Meeting Request Time*, select **Set Minimum Request Time >>**

The default meeting status for all facilities is automatically set to *No Minimum …*

Under *Manage Minimum Meeting Request Time*, for each facility choose one of the two available options:

- **3-day Minimum for Meeting Requests**
- **No Minimum Number of Days for Meeting Requests**

  Update Facility Status >>

Once this is set, HCIRs / Reps may sign-in up to 12 hours before or after their requested meeting time.

KEY TIP: *If you set the 3-day minimum, requests not processed two days before the meeting is to occur will be automatically approved.*

Select **Facility-wide Minimum Meeting Request Time**

Set / Manage Individual Rep Meeting Requirements:

If you have one particular HCIR / Rep (or company) not following facility requirements, you have the option of setting exceptions to the facility-wide meeting requirements (*down to the individual HCIR / Rep if necessary*).

In SEC^{3}URE, pull down the **Administration** menu and select **Meeting Generator**.

Under *Set Individual Rep Meeting Requirements*, select **Set Requirements >>**

To locate an individual HCIR / Rep, use the drop-downs to select the **Facility** and then the **Rep Category**. **Show Reps >>**

Under the resultant category of HCIRs / Reps with access to the facility, select one status for *ALL* or *SPECIFIC* individual:

- **Facility Default**
- **Approval Required**
- **No Approval Required**

Update Requirements >>

> **KEY TIP**: *Use the browser Search feature to quickly find the HCIR / Rep if the list is long. Click on the column 'Company' to sort ascending or descending.*
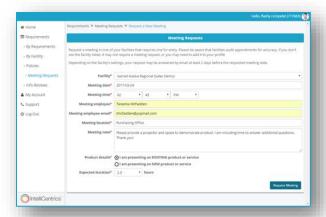
Select a specific **Name** link in the results table to open the HCIR / Reps' dashboard. This gives you the option of setting an expiration date for her/his meeting requirements.
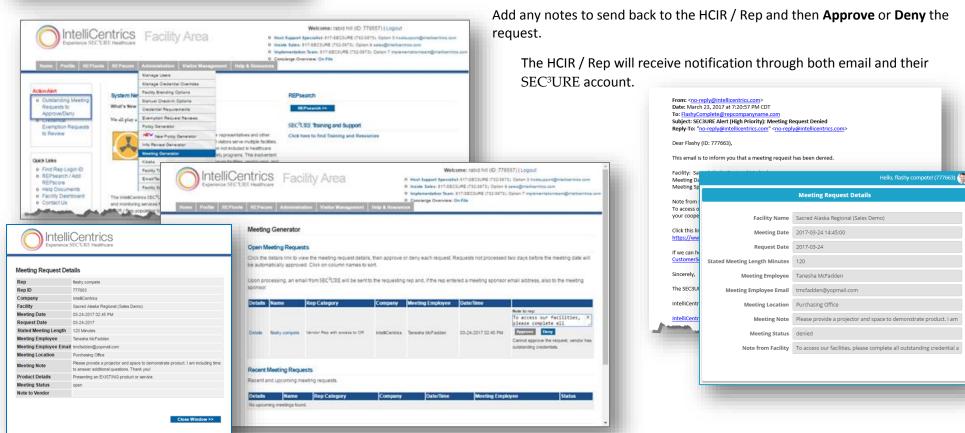
Manage Meeting Requests:

When facility or individual meeting request requirements are set, HCIRs / Reps will need to log-into their SEC³URE accounts and submit meeting requests before they wish to access your facility(ies). If they show up without the request, they will not be allowed to check-in (ad hoc).

You or your facility's Department Leads will need to periodically log into SEC³URE and check for **Outstanding Meeting Requests**. You may also signup to receive email and/or text notifications through SEC³URE.

To *Manage Meeting Requests;* from SEC³URE **Home** page, look for an **Outstanding Meeting Requests** link under the **Action Alert** box to the left (*or pull down the **Administration** menu and select **Meeting Generator**).

You are presented with all **Open Meeting Requests**. Select the Details link to review the *Meeting Request Details* provided by the HCIR / Rep.
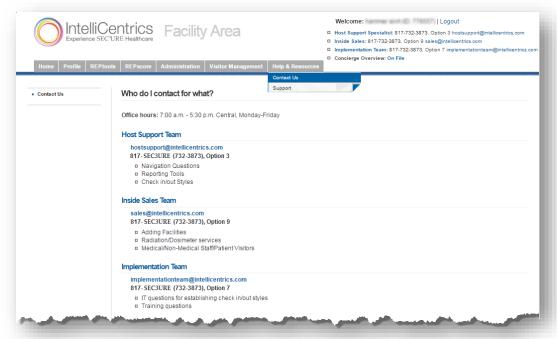
Add any notes to send back to the HCIR / Rep and then **Approve** or **Deny** the request.

The HCIR / Rep will receive notification through both email and their SEC³URE account.

📞 Support

For additional facility support, please call us at 817-SEC3URE (732-3873), fill out an online [facility support inquiry](#), or email the [Host Support Team](#) directly.

Additional Facility Roles:

IntelliCentrics is a community of professionals, patients, their families, and facilities, working together to achieve a safe and SEC³URE healthcare experience. Contact [IntelliCentrics Marketing](#) to find out how to expand your facility's SEC³URE environment.