

SEC³URE Host Admin | Manual Check-in Setup Guide



Manual Check-in/Check-out provides SEC³URE Facility Host Users and administrators with an alternative method for checking HCIR Reps in and out using computers and printers other than the stand-alone kiosk or SEC³URE Mobile App.

This document will guide you or your facility's IT or SEC³URE administrator through the steps necessary to setup a SEC³URE Facility User's computer for Manual Check-in/Check-out.

Included in this guide:

1. [Install latest DYMO printer driver](#)

- OR -

1. [Install latest Brother printer driver](#)

2. [Ensure latest Java Environment](#)

3. [Ensure latest Adobe Reader](#)

4. [Select Facility Badge Template and Upload Facility Logo](#)

[Manual Check-in/Check-out](#)

[Facility Visits Report](#)

[Vendor Override Report](#)

[Facility Compliance Dashboard](#)

Confirm the following before you setup the computer:

- ☐ You must have a **SEC³URE Administrator** login (access to SEC³URE *Facility Area*). If you require this access, contact your SEC³URE facility administrator or your IntelliCentrics concierge manager to add you as a SEC³URE user.
- ☐ You must have **administrative rights** to the computer to perform updates or changes.



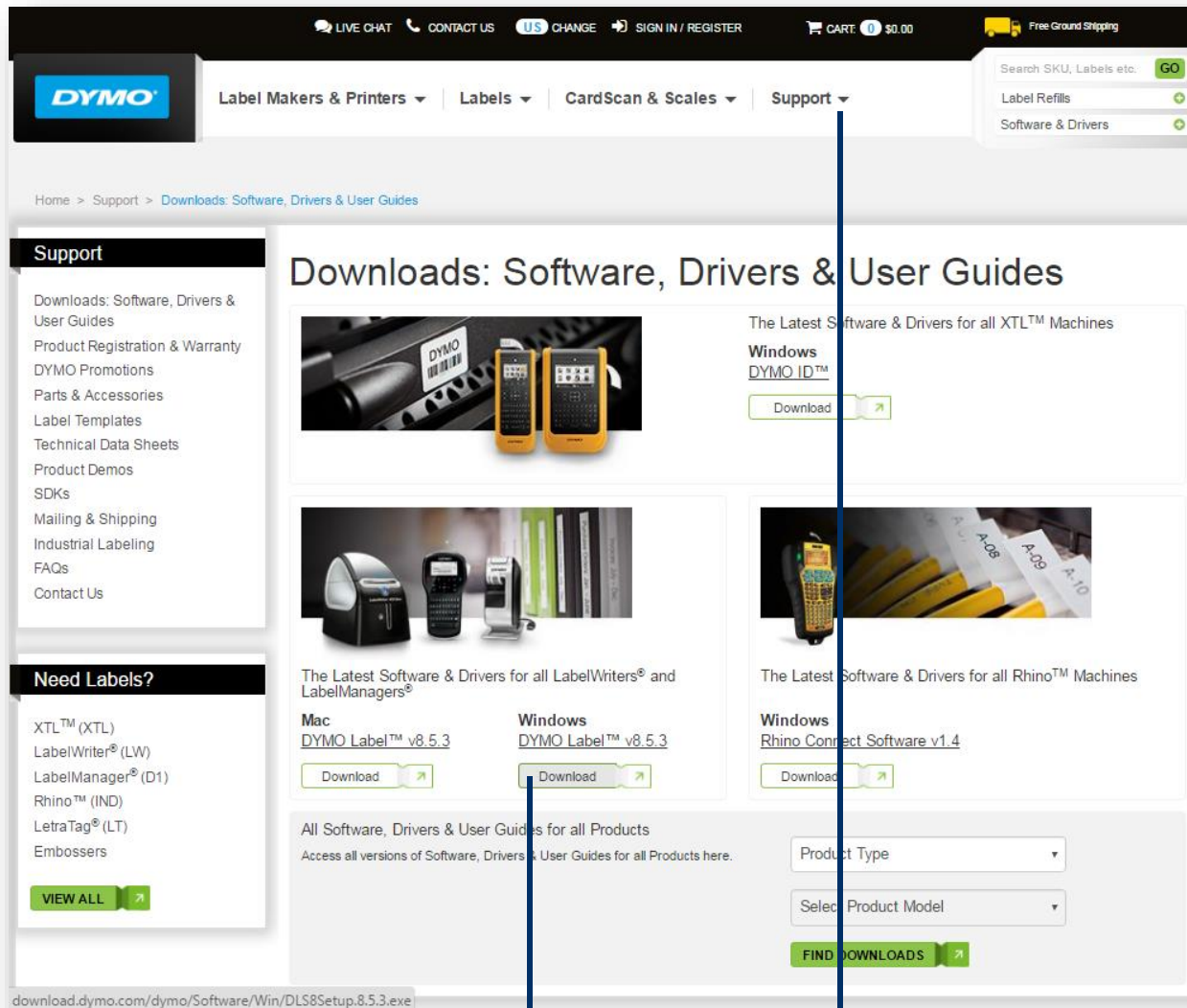
SEC3URE Facility Users are responsible for ensuring HCIR / Reps are fully compliant with all facility policies and Credential Requirements before manually checking visitors into a facility. They may also need a facility's SEC³URE Override Code.

Minimum system requirements for SEC³URE manual check-in*:

- ☐ Microsoft Windows 7 or above
- ☐ Connection to the internet and using: [Microsoft Internet Explorer 11](#) | [Microsoft Edge \(Chromium\)](#) | [Mozilla Firefox](#) | [Google Chrome](#)
- ☐ Running the latest version of Java: www.java.com and Adobe Acrobat Reader: www.adobe.com

* Unsupported versions of Windows or web browsers may become out of compliance with [HIPAA security protocol](#).

1. Install latest DYMO printer driver:



Download Windows printer driver

DYMO Support / Downloads

If you are utilizing DYMO LabelWriter 400 / 400 Turbo or 450 / 450 Turbo (via USB), follow these steps to install the latest printer driver on the computer:

- In your web browser, go to: www.dymo.com
- Go to DYMO Support/Downloads page
- Download the most current DYMO printer driver for Windows (this will be an *.EXE file): [DYMO Label™ v8.5.4](#)
- Install printer driver on the computer using the “Express Installation” option. Follow the instructions given.

DYMO LabelWriter Refill SKUs

Logo badge: 30857 or 30256

Stop sign badge: 30911 or 30856

1. Install latest Brother printer driver:

The screenshot shows the Brother Solutions Center website for the QL-720NW printer. The page has a blue header with the Brother logo and 'at your side' tagline. Below the header, there's a navigation bar with 'Home', 'United States', and 'QL-720NW'. The main content area is titled 'Support & Downloads' and features a sidebar on the left with links to 'Downloads', 'FAQs & Troubleshooting', 'Manuals', 'Consumables & Accessories', 'Supported OS', and 'Specification'. The main content area has sections for 'Downloads', 'FAQs & Troubleshooting', 'Manuals', 'Consumables & Accessories', 'Supported OS', and 'Specification'. A blue line points from the 'Downloads' section to a callout box labeled 'Brother Support & Downloads'.

If you are utilizing Brother Label Printer QL720W/NW (via USB, Ethernet, or WiFi), follow these steps to install the latest printer driver on the computer:

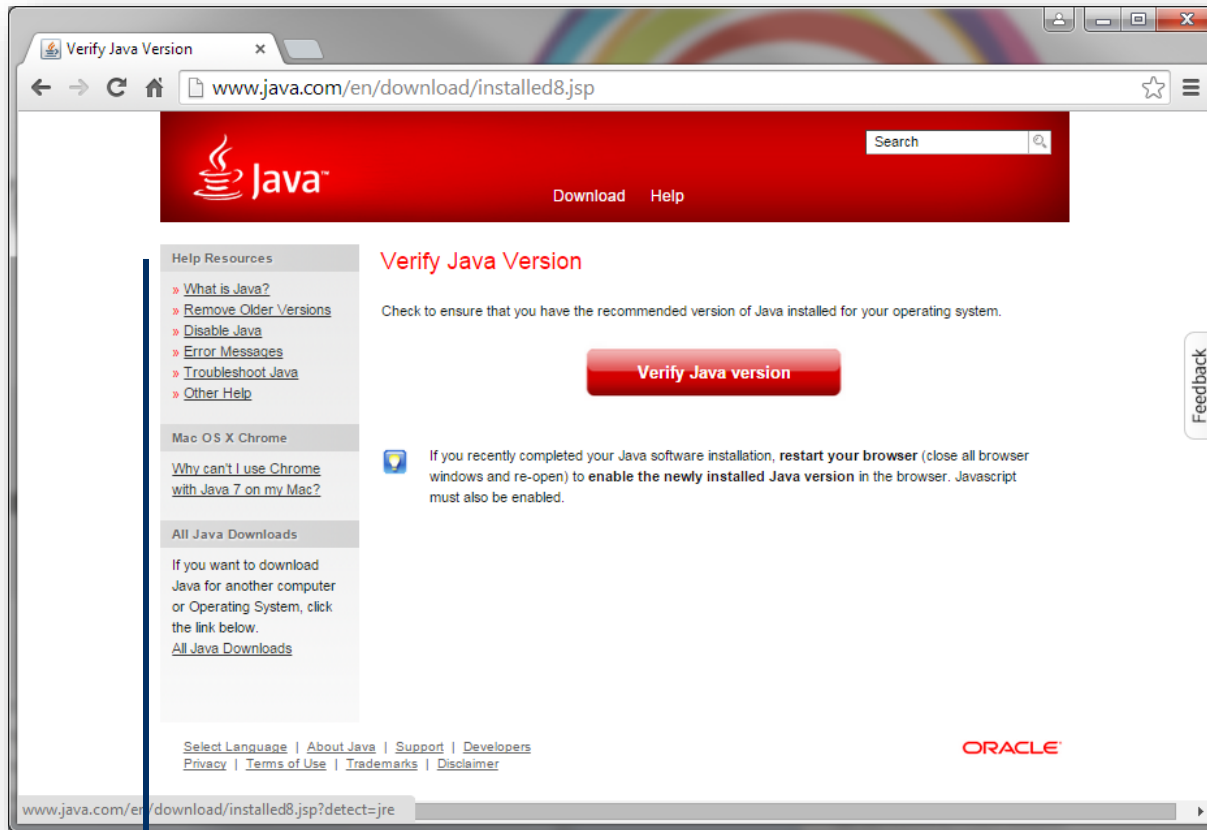
- In your web browser, go to: www.brother-usa.com
- Locate QL-720NW product category on Brother Solutions Center page
- Select Downloads
- Select your operating system and then **Search** for the latest Printer Driver
- Select the **Printer Driver** link under the *Drivers* section and then follow the steps to download to the computer (*EXE file)
- Locate the printer driver downloaded and then unzip / run the *EXE file. Follow the instructions given.

Brother QL-720NW Label Roll Refill SKU:

Logo badge: DK-1202

Brother Support & Downloads

2. Ensure latest Java environment is installed



Look for additional Java
Help Resources

a) In your web browser, go to:

www.java.com

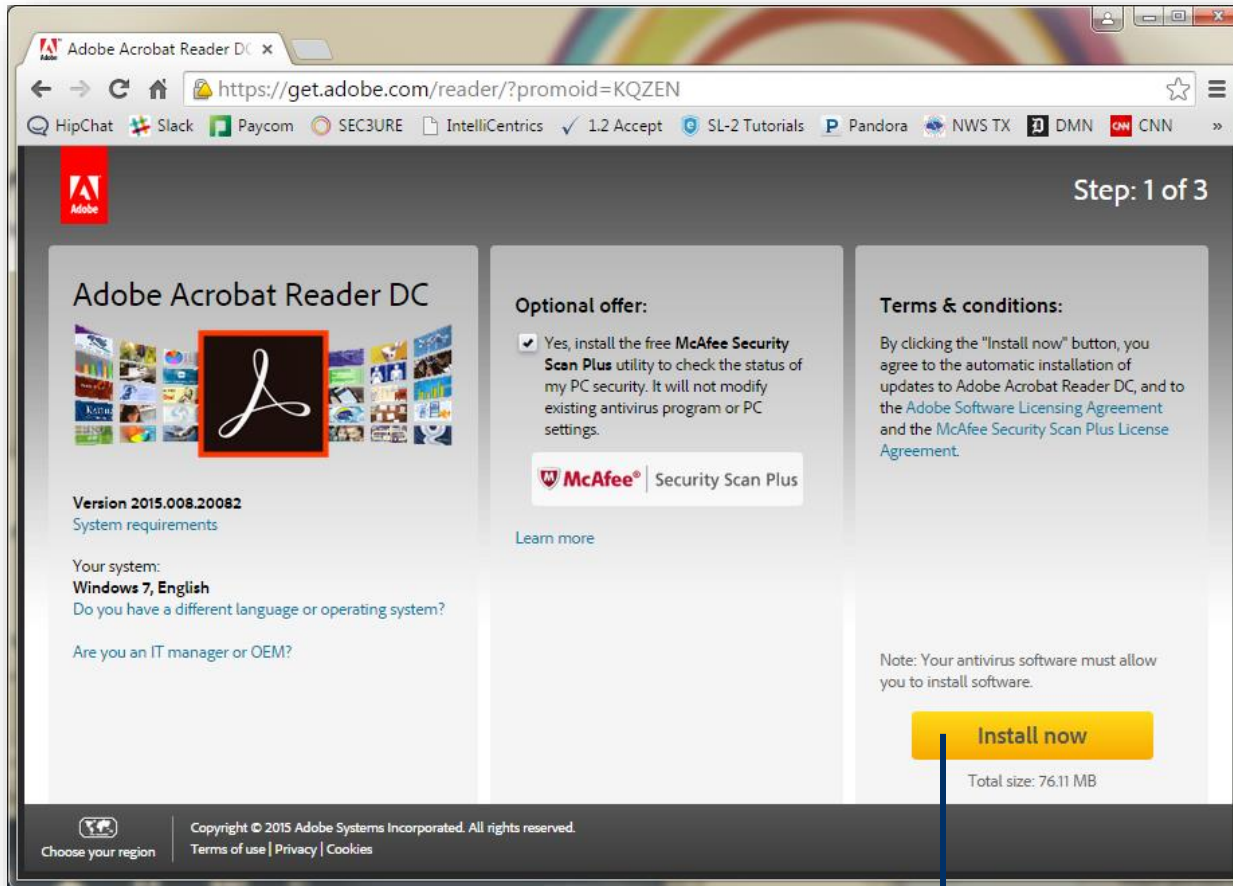
b) Select [Do I have Java?](#) link

c) Click **Verify Java version** button

Follow the instructions for downloading the current version and removing old versions. Java automatically detects the browser being used and downloads the appropriate version.

Close and then restart the web browser.

3. Ensure latest Adobe Acrobat Reader is installed



Install free Adobe Reader

a) In your web browser, go to:

www.adobe.com

b) Locate the (free) Adobe Reader download

c) Click **Install now** button

Follow the instructions for downloading the current version.

Close and then restart the web browser.

4. Select Facility Badge Template and Upload Facility Logo

Use the **Facility Branding Options** to customize the printed SEC³URE badges and kiosk with your system or facility logo.

Select the **System**,
Division, or **Facility** level

Select **Premium & Base**
Badge Template styles

Upload facility **Logo**

In SEC³URE:

- Pull down the **Administration** menu and then select **Facility Branding Options**
- On the *Facility Branding Options* page, choose the System level (*set system-wide options*), Division level (*set division options*), and/or Facility (*set options at just that facility*).

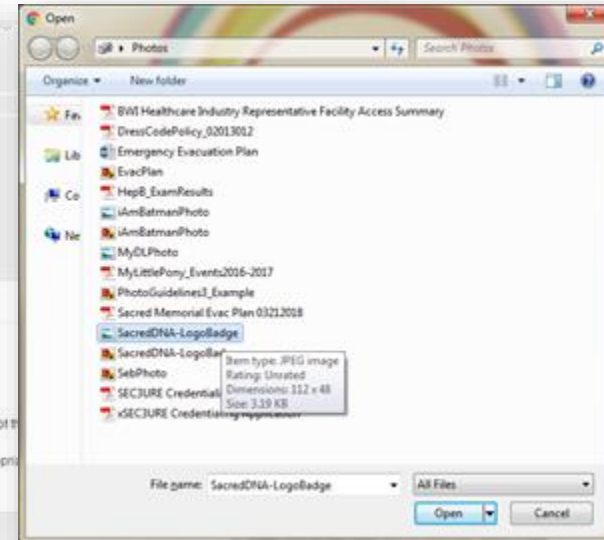
Use the drop-down menus to preview and then choose the HCIR / Rep badge templates for both:

- Premium** SEC³URE subscribers (*vertical*)
- Base** SEC³URE subscribers (*horizontal*)

Note: These do not need to be the same

To **Upload a System or Facility Logo**, select the **Choose File** button to browse your computer for the image. Ensure the image file meets the Logo Guidelines described and then **Open**.

Select **Save Changes >>**



Manual Check-in / Check-out

Welcome: Stephen Tindula (ID: 778557) | Logout

Concierge Manager: Michelle McClain
Email: mmccclain@intellcentrics.com
Direct Line: 972-318-0517
Concierge Overview: **Not on File**

Home Profile REPtools REPScore Administration Visitor Management Help & Resources

Check Rep In or Out
Find Rep by Email Address
REPsearch

Facility Visits Report
NEW Facility Visits Report
Rep Roster Report
Rep Compliance Report
NEW Rep Compliance Report
Rep Category Report
NEW Rep Category Report
Vendor Override Report/Service
NEW Vendor Override Report
Seasonal Flu Report
Credential/Policy Expiry Report

Facility Name: [br]
Last Name: [wa]
First Name: []
Rep Category: []
Check-In ID #: []
Vendor Override Report/Service: [] (Please separate criteria with a space.)
Include all reps ☐ Do not include reps with revoked access ☐

Search >>

Search Results: 1

Click the rep's name to view profile details such as outstanding requirements, entry status, contact information and visits.

Choose an action from the drop down menu below, select the appropriate reps, and click Perform Action. When the dialog box opens, add the necessary details to complete the action.

Perform Action: [] check all / uncheck all

Search HCIR / Rep

If an HCIR / Rep is unable to check-in/out of your facility via their Mobile App or the facility's kiosk, you have a manual option available through SEC³URE:

- Login using your SEC³URE Facility User login ID & password
- Pull down the **REPtools** menu and select **REPsearch** (Do not use the **Check Rep In or Out** option yet)
- Enter the HCIR / Rep's information and then **Search**
If the person cannot be found:
 - Is the search information entered correctly?
 - Is the HCIR / Rep attached to your facility?
- Under **Search Results**, select the HCIR / Rep's name (link)
- Confirm the HCIR / Rep is compliant for your facility
- Under **Actions**, select **Check in Rep**
- Fill-in all the **Visit Details** and then **Check In**
- Print** the badge (ensure the HCIR / Rep wears it correctly)

Select HCIR / Rep

Bruce Wayne

SEC3URE ID : 610627
Rep Category : Vendor Rep with access to OR
Company : IntelliCentrics
Job Title : Batman
Phone : 179-565-1234
Email : 610627@reptrax.com

REPScore: 80%

Enlarge Photo
If the photo is inappropriate, you can Add REPScore Event

Views
Dashboard
Profile Details
Scope Of Services Answers
Facility Visits
Outstanding Requirements
View Existing Credentials
Credential Submissions
Exemption Request Reviews
Policy Compliance
Community REPScore

Actions
Check In Rep
Add REPScore Event
Revoke or Restore Access
Manage Meeting Requirements
Info Review Requests
Comments/Notes

This Rep has 6 credential submissions due to be processed, so they may be in the process of outstanding items. View Rep Credential Submission History & Status Here

Facility Name	Entry	Outstanding Items
Sacred Memorial (Hosp Demo)	Access Denied	Credential: Tdap Credential: Proof of Employer General Liability Coverage Credential: Evidence of Employer Product/Service Competency Credential: Proof of Drug Screen Credential: Aseptic Techniques Training Credential: Fire Safety Training Credential: HIPAA Training Credential: O.R. Protocol Training
Development Facility (Tech Demo)	Access Denied	Policy: OSUpgrade_Test1 Credential: Proof of Employer General Liability Coverage Credential: Evidence of Employer Product/Service Competency Credential: Criminal Background Check

Check In Rep

To manually Check an HCIR / Rep Out of your facility:

- Pull down the **REPtools** menu and select **Check a Rep in or out**
- Locate the person's name (link) and then select **Check Out**

Bruce Wayne (ID: 610627)

Check In Rep:
Use this page to manually check in a rep and print a badge. Please see the [Manual Check-in Setup Guide \(pdf\)](#) for instructions on how to configure your computer to print a badge.

Facility * Sacred Memorial (Hosp Demo)

Visit Details:
Please ask the rep to provide accurate, descriptive details about the meeting.

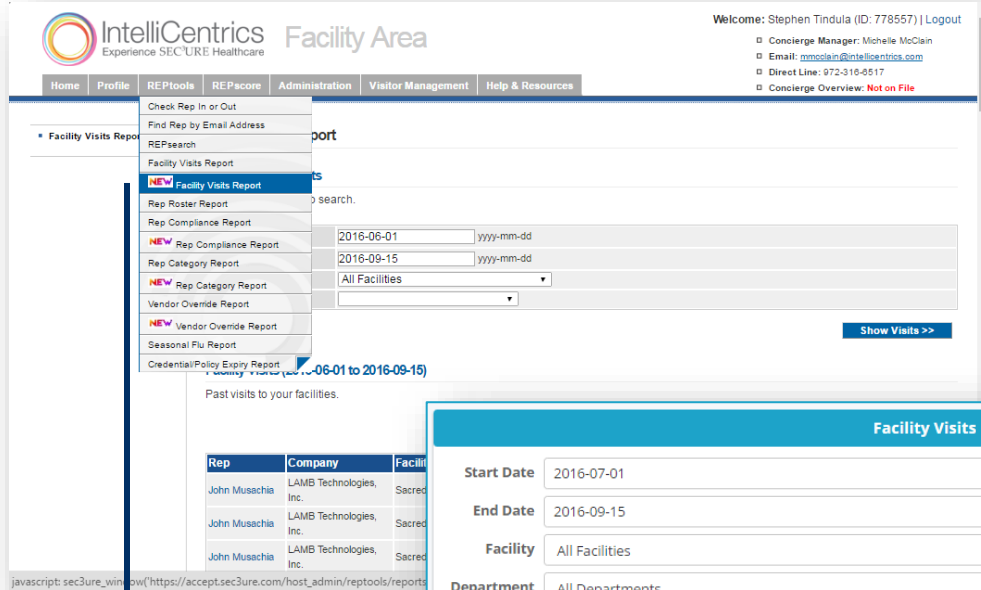
Visiting Contact First Name * Tanisha
Visiting Contact Last Name * McFadden
Department * Other: Purchasing
Purpose of Visit * Review current operational requirements and facilitate Q&A session (Min. 5 characters and a Max. of 256 characters)
Visit Duration (hours) * 2.0
Override Code * 1234

Back to Dashboard Check In

Enter Visit Details and Check In

Facility Visits Report

Use **Facility Visits** to review everyone checking into your facilities via SEC3URE (*Kiosk, Mobile App, and manually*). Use the report options to narrow the results to specific *Facilities, Department, or time frame*.



Facility Visits Report

Select HCIR / Rep to perform action

In SEC³URE, pull down the **RETools** menu and select **Facility Visits Report**. Use the *Date* and *Facility/Department* options to expand or narrow your *Search* results. Use the *Show* dropdown to list from 10 to 100 results on the page.

To perform an action (e.g., *Export to *CSV file*) on one or many HCIRs, you may **Select**:

- *Single* checkbox next to each person listed
- *Current Page*: Select everyone on just this page
- *All Pages*: Select All search results
- *Unselect All*

Select the **Actions** links listed in the table to:

- Review the specific **Visit Details**
- **Add REPScore Event** for the individual

KEY TIP: Select the arrows next to the column labels to sort the table results ▲ ascending or ▼ descending.

Facility Visits Report

Start Date2016-07-01

End Date2016-09-15

FacilityAll Facilities

DepartmentAll Departments

Search

Actions

Please Select

Select: Current Page | All Pages | Unselect All

Perform Action

Show

10

entries

Name	Company	Facility Name	Department	Date/Time	Visit Length	Actions
<input type="checkbox"/> John Vendor	IntelliCentrics	Sacred Memorial (Hosp Demo)	Surgery	2016-08-15 10:01:02AM	12 mins	Visit Details Add REPScore Event
<input type="checkbox"/> Pat Virant	IntelliCentrics	Development Facility (Tech Demo)	Testing testerton	2016-08-15 12:48:42PM	14 mins	Visit Details Add REPScore Event
<input type="checkbox"/> Pat Virant	IntelliCentrics	Development Facility (Tech Demo)	Testing testerton	2016-08-15 1:03:11PM	20216 mins	Visit Details Add REPScore Event
<input checked="" type="checkbox"/> Eleanor Duncan	IntelliCentrics	Sacred Memorial (Hosp Demo)	Clinic	2016-08-16 9:11:28AM	1 min	Visit Details Add REPScore Event
<input type="checkbox"/> Eleanor Duncan	IntelliCentrics	Sacred Memorial (Hosp Demo)	Clinic	2016-08-16 9:27:39AM	4 mins	Visit Details Add REPScore Event
<input type="checkbox"/> Eleanor Duncan	IntelliCentrics	Sacred Alaska Regional (Sales Demo)	Kiosk Test Department	2016-08-16 2:02:54PM	9 mins	Visit Details Add REPScore Event
				2016-08-22		Visit Details Add

Visit Details	
Name :	Eleanor Duncan
SEC3URE ID :	457368
Company Name :	IntelliCentrics
Facility :	Sacred Memorial (Hosp Demo)
Department :	Clinic
Check In Type :	Manual: Eleanor Duncan
Check In :	2016-08-16 09:11 AM
Override Used :	YES
Check Out Type :	Manual: Eleanor Duncan
Check Out :	2016-08-16 09:12 AM
Stated Visit Length :	30 minutes
Actual Visit Length :	1 Minutes
Meeting Employee :	Dr Jones
Meeting Location :	Clinic
Meeting Note :	Case
Denial Reason :	

Visit Details: Was an override code used? Was Manual Check-out used; and by whom?

Vendor Override Report

Use this report to monitor facility use of check-in override codes. Monitor Healthcare Industry Reps (HCIRs) / Vendors, as well as *Facility Users*, who may be attempting to circumvent facility requirements and policies.

IntelliCentrics Facility Area

Welcome: Stephen Tindula (ID: 778557) | Logout

- Concierge Manager: Michelle McCain
- Email: mmccain@intellcentrics.com
- Direct Line: 972-316-6517
- Concierge Overview: [Not on File](#)

Vendor Override Report

Start Date: 2016-08-16
End Date: 2016-09-15
Facility: All Facilities

Manual Check-in Overrides by company name

Show 10 entries

Facility Name	Company Name	Name	Number of Overrides
Sacred Alaska Regional (Sales Demo)	IntelliCentrics	Eleanor Duncan	1
Sacred Memorial (Hosp Demo)	LAMB Technologies, Inc.	John Musachia	3
Sacred Memorial (Hosp Demo)	IntelliCentrics	Eleanor Duncan	3
Sacred Memorial (Hosp Demo)	Direct Access Medical	John Brannigan	1

Previous 1 Next

Manual Check-in Overrides by facility user

Show 10 entries

Facility Name	Facility User	Number of Overrides
Sacred Alaska Regional (Sales Demo)	Eleanor Duncan	1
Sacred Memorial (Hosp Demo)	Eleanor Duncan	7

Previous 1 Next

All Manual check-in overrides for your selected facilities

Show 10 entries

Facility Name	Company Name	Name	Facility User	Override Date
Sacred Memorial (Hosp Demo)	LAMB Technologies, Inc.	John Musachia	Eleanor Duncan	2016-08-26 04:01 PM
Sacred Memorial (Hosp Demo)	LAMB Technologies, Inc.	John Musachia	Eleanor Duncan	2016-08-26 02:47 PM

Export Overrides to Excel/CSV

In SEC³URE, pull down the **REPTools** menu and select the **Vendor Override Report**. Use the *Date* and *Facility* options to expand or narrow your *Search* results. Use the *Show* dropdown in each of the tables listed to list from 10 to 100 results:

- Manual Check-in Overrides by **company name**
- Manual Check-in Overrides by **facility user**
- All Manual Check-in Overrides** for your selected facilities

Use Type-ahead **Search** to narrow the results listed in the tables. Sort the results ▲ *ascending* or ▼ *descending* by selecting the column headers.

KEY TIP: Share this information so facility employees understand the importance of maintaining SEC³URE facilities.

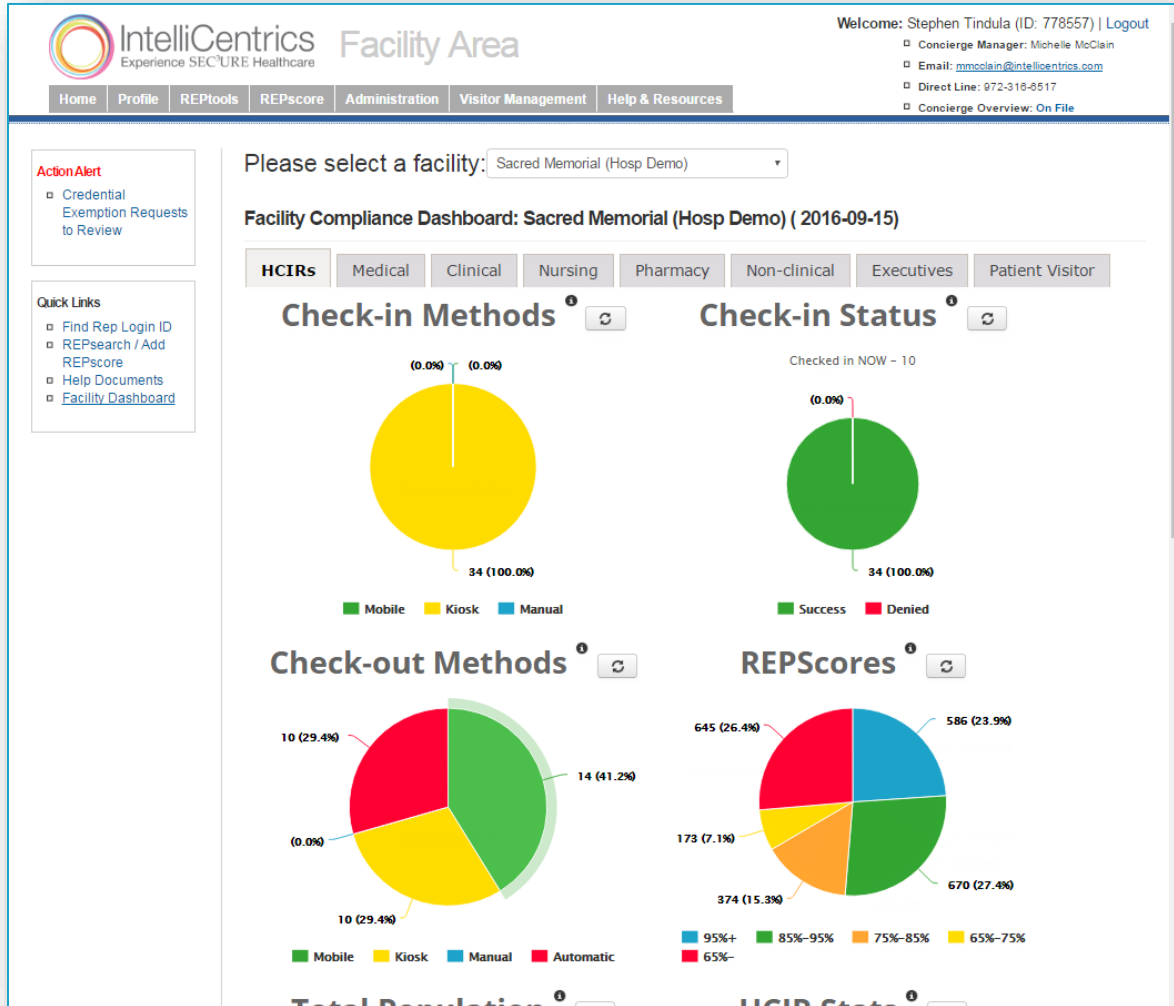
Type-ahead Search

Vendor Override Report

Export ALL overrides to
*XLS / *CSV file

Facility Compliance Dashboard: Check-in / Check-out Methods

Your **Facility Compliance Dashboard** provides you with a real-time snapshot of current HCIR / Rep activities in your facilities. You can easily monitor when HCIR / Reps are being manually checked-in or out.



From the SEC³URE **Home** page, select the **Facility Dashboard** link under *Quick Links*.

Use the dashboard to:

- See how many HCIR / Reps are **Checked-in NOW**
- Review the **Methods** HCIR / Reps Checked-in and Checked-out TODAY

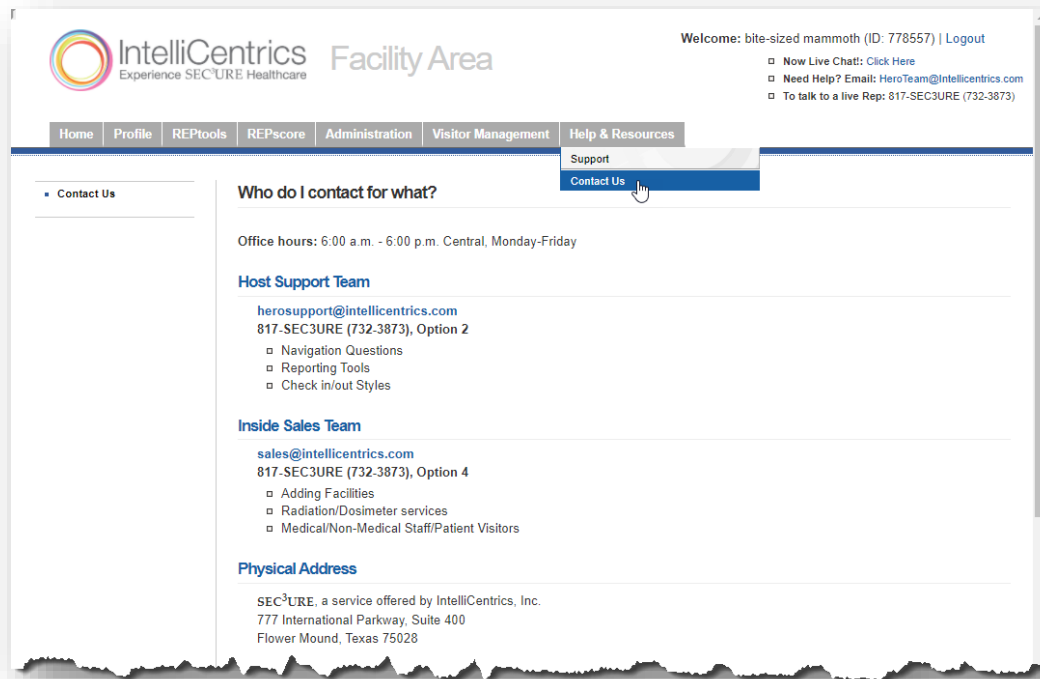
When **Manual check-in/out** is being utilized, go to your **Facility Visits Report** to investigate further. *This could potentially be where facility requirements are being circumvented.* Find out the facility user and the HCIR / Rep to directly communicate facility compliance requirements.

KEY TIPS for using the Facility Dashboard charts:

- The Dashboard displays metrics for individual facilities. Use the dropdown to choose another facility within your system.
- When available, charts will show you “real-time” data (e.g., **Checked-in NOW**).
- Hover the pointer over data points in the charts to display additional tooltip labels.
- Click on or select a series label in the legends to remove or add key metrics viewed on a chart. This provides different perspectives to interpret your facility HCIR data.
- Hover over the **i** to display chart Help tooltips.

Support

For additional facility support, please call us at 817-SEC3URE (732-3873), fill out an online [support inquiry](#), or email the HeroSupport@IntelliCentrics.com 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.

HCIRs	Medical	Clinical	Nursing	Pharmacy	Non-clinical	Executives	Patient Visitor
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Thank you for your interest in expanding your facility's safety and security. The group you have selected is not included in your current SEC3URE services. In order to SEC3URE this group, please dial 817-SEC3URE (732-3873) or email marketing@IntelliCentrics.com. It is most helpful if your email includes the contact name and department for group who might be interested in the expanded service. Your information will be provided to the appropriate IntelliCentrics team member who