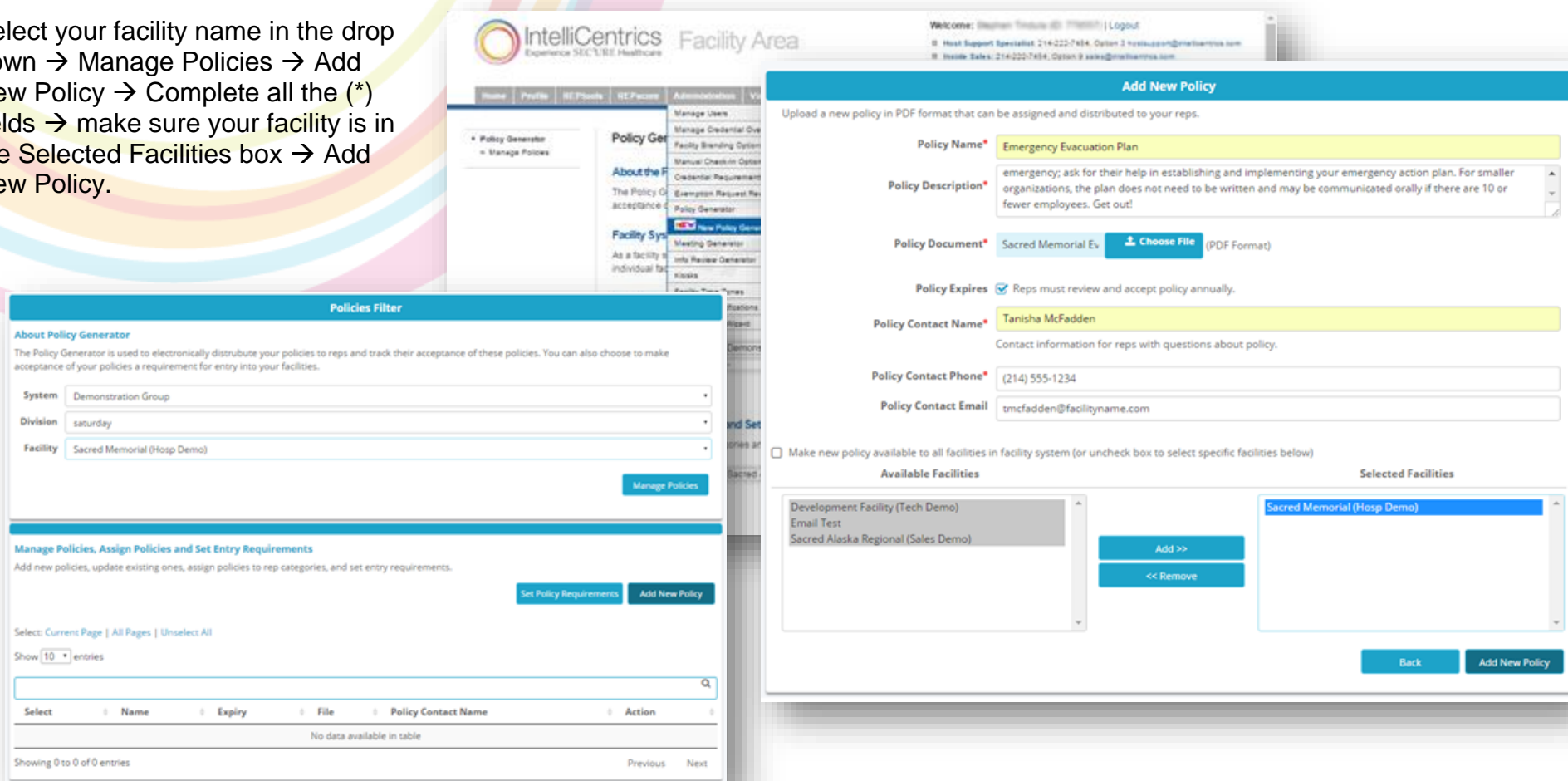


## Facility Administrators: Setup & Assign Policies

Before you begin assigning a facility policy, you first need to create and save an Adobe \*PDF version of the policy document to your PC. This is the document the HCIRs / Reps will be reviewing before they can accept the policy. The \*PDF document file size may be no more than 4.5MB.

### Step 1: Add New Policy | Administration tab → New Policy Generator

Select your facility name in the drop down → Manage Policies → Add New Policy → Complete all the (\*) fields → make sure your facility is in the Selected Facilities box → Add New Policy.



The screenshot displays the IntelliCentrics Facility Area interface. The main content area shows the 'Add New Policy' form, which includes fields for Policy Name, Policy Description, Policy Document (with a 'Choose File' button), Policy Expires (checked), Policy Contact Name, Policy Contact Phone, and Policy Contact Email. Below these fields are checkboxes for 'Make new policy available to all facilities in facility system' and 'Selected Facilities' (with a list of facilities and 'Add'/'Remove' buttons). The 'Policies Filter' sidebar on the left shows the 'Policy Generator' tab selected, with a list of facilities including 'Sacred Memorial (Hosp Demo)'.

**IntelliCentrics Facility Area**

Welcome: Stephen Thomas (ID: 778888) | Logout  
Host Support Specialist: 214-225-7434, Option 3 hostsupport@intellcentrics.com  
Inside Sales: 214-225-7434, Option 9 sales@intellcentrics.com

**Add New Policy**

Upload a new policy in PDF format that can be assigned and distributed to your reps.

**Policy Name\*** Emergency Evacuation Plan

**Policy Description\*** emergency; ask for their help in establishing and implementing your emergency action plan. For smaller organizations, the plan does not need to be written and may be communicated orally if there are 10 or fewer employees. Get out!

**Policy Document\*** Sacred Memorial Ev [Choose File](#) (PDF Format)

**Policy Expires** ☒ Reps must review and accept policy annually.

**Policy Contact Name\*** Tanisha McFadden  
Contact information for reps with questions about policy.

**Policy Contact Phone\*** (214) 555-1234

**Policy Contact Email** tmcfadden@facilityname.com

☐ Make new policy available to all facilities in facility system (or uncheck box to select specific facilities below)

**Available Facilities**

- Development Facility (Tech Demo)
- Email Test
- Sacred Alaska Regional (Sales Demo)

**Selected Facilities**

- Sacred Memorial (Hosp Demo)

[Add >>](#) [<< Remove](#)

[Back](#) [Add New Policy](#)

**Policies Filter**

**About Policy Generator**

The Policy Generator is used to electronically distribute your policies to reps and track their acceptance of these policies. You can also choose to make acceptance of your policies a requirement for entry into your facilities.

**System** Demonstration Group

**Division** Saturday

**Facility** Sacred Memorial (Hosp Demo)

[Manage Policies](#)

**Manage Policies, Assign Policies and Set Entry Requirements**

Add new policies, update existing ones, assign policies to rep categories, and set entry requirements.

[Set Policy Requirements](#) [Add New Policy](#)

Select: Current Page | All Pages | Unselect All

Show 10 entries

Select	Name	Expiry	File	Policy Contact Name	Action
No data available in table					

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

## Step 2: Set Policy Requirements | Administration tab → New Policy Generator

Select your facility in the drop down → Manage Policies → check the box to the left of the policy name  
→ Set Policy Requirements.

**Policies Filter**

**About Policy Generator**  
The Policy Generator is used to electronically distribute your policies to reps and track their acceptance of these policies. You can also choose to make acceptance of your policies a requirement for entry into your facilities.

System: Demonstration Group  
Division: saturday  
Facility: Sacred Memorial (Hosp Demo)

**Manage Policies, Assign Policies and Set Entry Requirements**  
Add new policies, update existing ones, assign policies to rep categories, and set entry requirements.

Select: Current Page | All Pages | Unselect All  
Show 10 entries

sac

Select	Name	Expiry	File	Policy Contact Name
<input checked="" type="checkbox"/>	Sacred Memorial DNA Emergency Evacuation	No		Tanisha McFadden

Showing 1 to 1 of 1 entries (filtered from 19 total entries)

There are three settings:

Not Required:	This policy is not required or visible for reps in this category.
Distribution:	This policy will be shown as an outstanding requirement to all reps in this category until it is acknowledged. This setting will not prevent them from entering your facility.
Required:	This policy is required for entry for reps in this category. If reps have not agreed to this policy, they will not be able to enter your facility.

**Set Policy Requirements**

You are setting the Policy Requirements for  
System: Demonstration Group  
Division: saturday  
Facility: Sacred Memorial (Hosp Demo)

Assign policies to each rep category.

- ☐ **Not Required:** This policy is not required or visible for reps in this category.
- ☐ **Distribution:** This policy will be shown as an outstanding requirement to all reps in this category until it is acknowledged. This setting will not prevent them from entering your facility.
- ☐ **Required:** This policy is required for entry for reps in this category. If reps have not agreed to this policy, they will not be able to enter your facility.

Policies Last Updated By Jason McGee (ID:632161) on 2016-10-20 (changes tracked since May 12th, 2009)

**Sacred Memorial DNA Emergency Evacuation**

Rep Role & Zone	<a href="#">Select All</a>	<a href="#">Select All</a>	<a href="#">Select All</a>
Vendor Rep with access to OR	<input type="radio"/> Not Required	<input type="radio"/> Distribution	<input checked="" type="radio"/> Required
Clinical Contractor Provider with access to OR/Patient Areas	<input type="radio"/> Not Required	<input type="radio"/> Distribution	<input checked="" type="radio"/> Required
Service Tech/Manager with access to OR	<input type="radio"/> Not Required	<input type="radio"/> Distribution	<input checked="" type="radio"/> Required
Vendor Rep with access to Invasive Labs	<input type="radio"/> Not Required	<input type="radio"/> Distribution	<input checked="" type="radio"/> Required
Volunteers with access to Facility	<input checked="" type="radio"/> Not Required	<input type="radio"/> Distribution	<input type="radio"/> Required
Member with access to doing business with facility no on-site presence	<input checked="" type="radio"/> Not Required	<input type="radio"/> Distribution	<input type="radio"/> Required
Delivery Person with access to Facility	<input checked="" type="radio"/> Not Required	<input type="radio"/> Distribution	<input type="radio"/> Required
Facilities Management with access to Facility	<input checked="" type="radio"/> Not Required	<input type="radio"/> Distribution	<input type="radio"/> Required

Back Cancel Update Policy Requirements

**Note:** You will need to either **SELECT ALL** if the policy will be required for all use categories. If this policy is user category specific each radio dial will need to be selected.

Best Practice recommends that policies begin in distribution for 10 – 15 days then be moved to **Required**.

HCIRs / Reps attached to your facilities will accept the policies in SEC<sup>3</sup>URE:

