

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](#)
- ☐ [Set Individual Rep Meeting Requirements](#)
- ☐ [Manage Minimum Meeting Request Time](#)
- ☐ [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.

The screenshots show the IntelliCentrics Facility Area interface. The top screenshot shows the 'Meeting Generator' menu item selected in the left sidebar. The middle screenshot shows the 'Meeting Generator' page with the 'Facility-Wide Meeting Requirement Status' section. The bottom screenshot shows the 'Facility-Wide Meeting Requirement Status' table with the 'Meeting Approval Required for All Reps' option selected for the 'Sacred Alaska Regional (Sales Demo)' facility.

IntelliCentrics Facility Area

Welcome: rabid hill (ID: 778557) | Logout

- Host Support Specialist: 817-SEC3URE (732-3873), Option 3 hostsupport@intellcentrics.com
- Inside Sales: 817-SEC3URE (732-3873), Option 9 sales@intellcentrics.com
- Implementation Team: 817-SEC3URE (732-3873), Option 7 implementationteam@intellcentrics.com
- Concierge Overview: On File

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Meeting Generator

The Meeting Generator can be used to require meetings to be approved for some or all of your Reps.

Facility-Wide Meeting Requirement Status

Facility	Meeting Approval Required for All Reps (No Minimum Number of Days for Meeting Requests)
Sacred Alaska Regional (Sales Demo)	Meeting Approval Required for All Reps
Sacred Memorial (Hosp Demo)	No Meeting Approval Required
Development Facility (Tech Demo)	No Meeting Approval Required
QA Test Facility 3	No Meeting Approval Required

Set Facility Status >>

Manage Minimum Meeting Request Time

Specify whether or not you wish to require your reps to submit meeting requests 3 days in advance

Meeting Generator

Set meeting requirements for your facilities.

Facility-Wide Meeting Requirement Status

Facility	Meeting Approval Required for All Reps
Sacred Alaska Regional (Sales Demo)	<input checked="" type="radio"/> Meeting Approval Required for All Reps
Sacred Memorial (Hosp Demo)	<input type="radio"/> No Meeting Approval Required <input type="radio"/> Meeting Approval Required for All Reps
Development Facility (Tech Demo)	<input type="radio"/> No Meeting Approval Required <input type="radio"/> Meeting Approval Required for All Reps
QA Test Facility 3	<input type="radio"/> No Meeting Approval Required <input type="radio"/> Meeting Approval Required for All Reps

Update Facility Status >>

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.

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Sacred Alaska Regional (Sales Demo)	Meeting Approval Required
Sacred Memorial (Hosp Demo)	No Meeting Approval Required
Development Facility (Tech Demo)	No Meeting Approval Required
QA Test Facility 3	No Meeting Approval Required

Set Facility Status >>

Manage Minimum Meeting Request Time

Specify whether or not you wish to require your reps to submit meeting requests 3 days in advance.

Set Minimum Request Time >>

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.*

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Meeting Generator

Specify whether or not you wish to require your reps to submit meeting requests 3 days in advance.

If a meeting is required from reps 3 days in advance, requests not processed 2 days before the meeting is to occur will be automatically approved.

Manage Minimum Meeting Request Time

Facility	3-day Minimum for Meeting Requests	No Minimum Number of Days for Meeting Requests
Sacred Alaska Regional (Sales Demo)	<input checked="" type="radio"/> 3-day Minimum for Meeting Requests	<input type="radio"/> No Minimum Number of Days for Meeting Requests
Sacred Memorial (Hosp Demo)	<input type="radio"/> 3-day Minimum for Meeting Requests	<input checked="" type="radio"/> No Minimum Number of Days for Meeting Requests
Development Facility (Tech Demo)	<input type="radio"/> 3-day Minimum for Meeting Requests	<input checked="" type="radio"/> No Minimum Number of Days for Meeting Requests
QA Test Facility 3	<input type="radio"/> 3-day Minimum for Meeting Requests	<input checked="" type="radio"/> No Minimum Number of Days for Meeting Requests

Update Facility Status >>

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*).

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Sacred Memorial (Hosp Demo)	No Meeting Approval Required
Development Facility (Tech Demo)	No Meeting Approval Required
QA Test Facility 3	No Meeting Approval Required

Set Facility Status >>

Manage Minimum Meeting Request Time

Specify whether or not you wish to require your reps to submit meeting requests 3 days in advance.

Set Minimum Request Time >>

Manage Meeting Requests

View, approve, or deny upcoming rep meeting requests.

Manage Meeting Requests >>

Set Individual Rep Meeting Requirements

Create exceptions to the facility-wide meeting requirement on a rep-by-rep basis.

Set Requirements >>

In SEC³URE, 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.

Meeting Generator

Set Individual Rep Meeting Requirements

Create exceptions to the facility-wide meeting requirement on a rep-by-rep basis. Select a facility and rep category to continue.

Facility: Sacred Memorial (Hosp Demo)

Rep Category: Vendor Rep with access to OR

Show Reps >>

Vendor Rep with access to OR - Sacred Memorial (Hosp Demo)

Click any name to bring up specific meeting requirements, including expiration date options.

Update Requirements >>

Click column names to sort

Name	Company	Meeting Requirement Status
peil substantial	Abbott Diagnostics	Facility Default Approval Required No Approval Required
Bustious flower	ABC Medical	Facility Default Approval Required No Approval Required
bulb accept	American Alarm Systems, Inc.	Facility Default Approval Required No Approval Required
live fair	Baylor Health Care Systems	Facility Default Approval Required No Approval Required
level dislike	BCBS	Facility Default Approval Required No Approval Required
physical hungry	deVew electronics	Facility Default Approval Required No Approval Required

Meeting Generator Requirements: illustrious flower (ID: 15358)

Current Requirements

Facility	Requirement Setting	Entry Requirement
Sacred Alaska Regional (Sales Demo)	Facility Default	Meeting Request Required
Sacred Memorial (Hosp Demo)	Facility Default	No Request Required
Development Facility (Tech Demo)	Facility Default	No Request Required

Update Meeting Requirements

Please note: Only administrator-level users can manage rep meeting requirements.

Facility: Sacred Alaska Regional (Sales Demo)

Requirement Setting: Approval Required

Date Setting Expires: 2017-06-30

Update Requirement >>

Recent & Upcoming Meetings

Approve or deny open requests page.

Details Facility

Meeting Employee	Status
No upcoming meetings found	

Close Window >>

Manage Meeting Requests:

Meeting Requests

Request a meeting in one of your facilities that requires one for entry. Please be aware that facilities audit appointments for accuracy. If you don't see the facility listed, it may not require a meeting request, or you may need to add it to your profile.

Depending on the facility's settings, your request may be answered by email at least 2 days before the requested meeting date.

Facility: Sacred Alaska Regional (Sales Demo)

Meeting date: 2017-03-24

Meeting time: 02:45 PM

Meeting employee: Tanesha McFadden

Meeting employee email: tmcfadden@yopmail.com

Meeting location: Purchasing Office

Meeting notes: Please provide a projector and space to demonstrate product. I am including time to answer additional questions. Thank you!

Product details: ☒ I am presenting an EXISTING product or service ☐ I am presenting a NEW product or service

Expected duration: 2.0 hours

Request Meeting

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 sign up 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.

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Concierge Overview: On File

Action Alert

- Outstanding Meeting Requests to Approve/Deny
- Exemption Requests to Review

Quick Links

- Find Rep Login ID
- RESearch / Add REP
- Help Documents
- Facility Dashboard
- Contact Us

System News

What's New

Hi all play

Meeting Generator

Click here to find Training and Resources

Meeting Request Details

Rep: flashy complete

Rep ID: 777663

Company: IntelliCentrics

Facility: Sacred Alaska Regional (Sales Demo)

Meeting Date: 03-24-2017 02:45 PM

Request Date: 03-24-2017

Stated Meeting Length: 120 Minutes

Meeting Employee: Tanesha McFadden

Meeting Employee Email: tmcfadden@yopmail.com

Meeting Location: Purchasing Office

Meeting Note: Please provide a projector and space to demonstrate product. I am including time to answer additional questions. Thank you!

Product Details: Presenting an EXISTING product or service.

Meeting Status: open

Note to Vendor:

Close Window >>

Meeting Generator

Open Meeting Requests

Click the details link to view the meeting request details, then approve or deny each request. Requests not processed two days before the meeting date will be automatically approved. Click on column names to sort.

Upon processing, an email from SEC³URE will be sent to the requesting rep and, if the rep entered a meeting sponsor email address, also to the meeting sponsor.

Details	Name	Rep Category	Company	Meeting Employee	Date/Time	Status
Details	flashy complete	Vendor Rep with access to DR	IntelliCentrics	Tanesha McFadden	03-24-2017 02:45 PM	Approve Deny

Note to rep: To access our facilities, please complete all

Cannot approve the request, vendor has outstanding credentials.

Recent Meeting Requests

Recent and upcoming meeting requests.

Details	Name	Rep Category	Company	Date/Time	Meeting Employee	Status
No upcoming meetings found.						

From: <no-reply@intellcentrics.com>
 Date: March 23, 2017 at 7:20:57 PM CDT
 To: FlashyComplete@repcompanyname.com
 Subject: SEC³URE Alert (High Priority): Meeting Request Denied
 Reply-To: "no-reply@intellcentrics.com" <no-reply@intellcentrics.com>

Dear Flashy (ID: 777663),

This email is to inform you that a meeting request has been denied.

Meeting Request Details

Facility Name: Sacred Alaska Regional (Sales Demo)

Meeting Date: 2017-03-24 14:45:00

Request Date: 2017-03-24

Stated Meeting Length Minutes: 120

Meeting Employee: Tanesha McFadden

Meeting Employee Email: tmcfadden@yopmail.com

Meeting Location: Purchasing Office

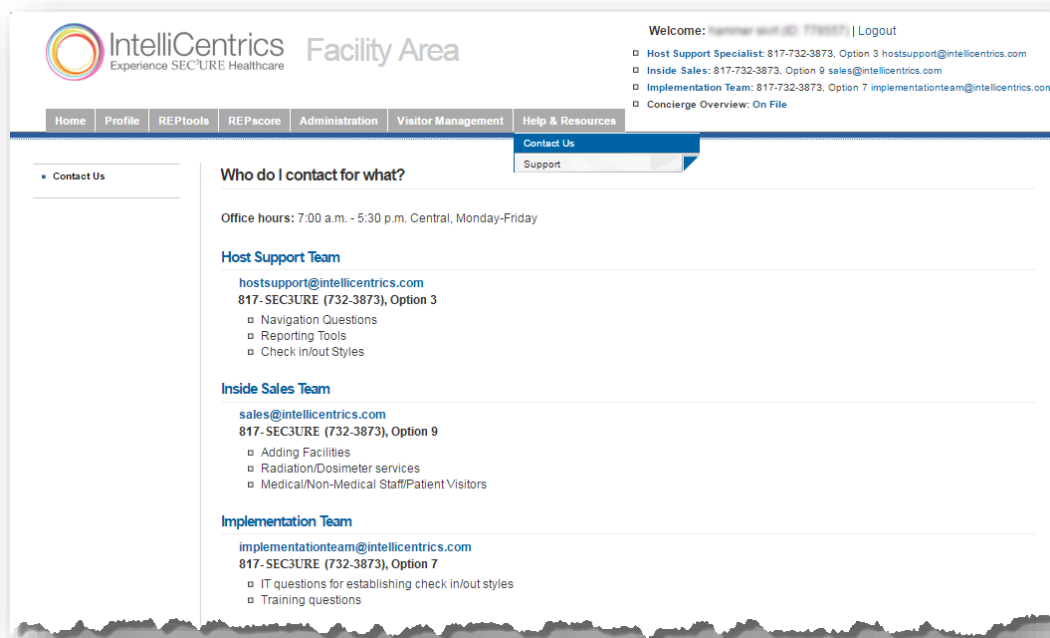
Meeting Note: Please provide a projector and space to demonstrate product. I am

Meeting Status: denied

Note from Facility: To access our facilities, please complete all outstanding credential a

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.

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