IntelliCentrics

SEC³URE Host Admin | Facility Reports & Dashboard

The SEC³URE Facility Compliance Dashboard expands on the concept of the static *Reptrax Facility Compliance Score*. It delivers real-time data so you can take immediate actions to reduce your patient risks. It delivers at-a-glance up-to-the-minute information displaying snapshot data. Then use configurable reporting tools so you can review historical and current facility trending. You make proactive informed and targeted SEC³URE decisions.

Included in this guide:

Facility Compliance Dashboard	Rep Category Report	Facility REPScore Report	COVID-19 Vaccinations
Facility Visits Report	Vendor Override Report	Average Facility REPScore	Credential Matrix
Rep / Vendor Roster Report	Facility Radiation Exposure Report	Seasonal Flu Report	Reports: Available Actions
Rep Compliance Report	Credential/Policy Expiry Report		

ⓘ SEC³URE matches the policies and credentials you want enforced with the people who are entering and leaving your facilities. SEC³URE Reporting shows the results of all this activity so you can make informed TRUST decisions in your facilities.

The key to accurate reporting, *and ultimately your facility security*, is EVERYONE doing their part to reinforce trust.

Include Inactive Users ☐

Connected healthcare professionals (reps) and contract clinicians whose accounts show zero activity (*checking-into the facility and logging into their SEC³URE account*) in the past 36 months are excluded from some SEC³URE reports by default. This improves the amount of time it takes to generate the reports and improves the data by removing folks who have not checked-in for a long time. This can also help you identify potential "ghosts" who may still be entering the facilities but not checking-in through SEC³URE.

You may always check the boxes to include inactive connections when running the reports; it will just take a little longer for the reports to finish.

Additional Information:

You may or may not be able to access all the SEC³URE features described in this guide. This will depend on the user privileges you have been assigned. Please contact your facility's SEC³URE system administrator to discuss any additional access.

Facility Compliance Dashboard

Monitor who is in your facility in Real-time

Hover on chart data to show Tooltip Labels

Powerful reporting starts by providing interactive easy-to-read metrics. The SEC³URE Facility Compliance Dashboard provides a real-time snapshot of current healthcare professional activities in your facilities. Quickly scan the charts to review checked-in/checked-out statuses, compliance, and trends.
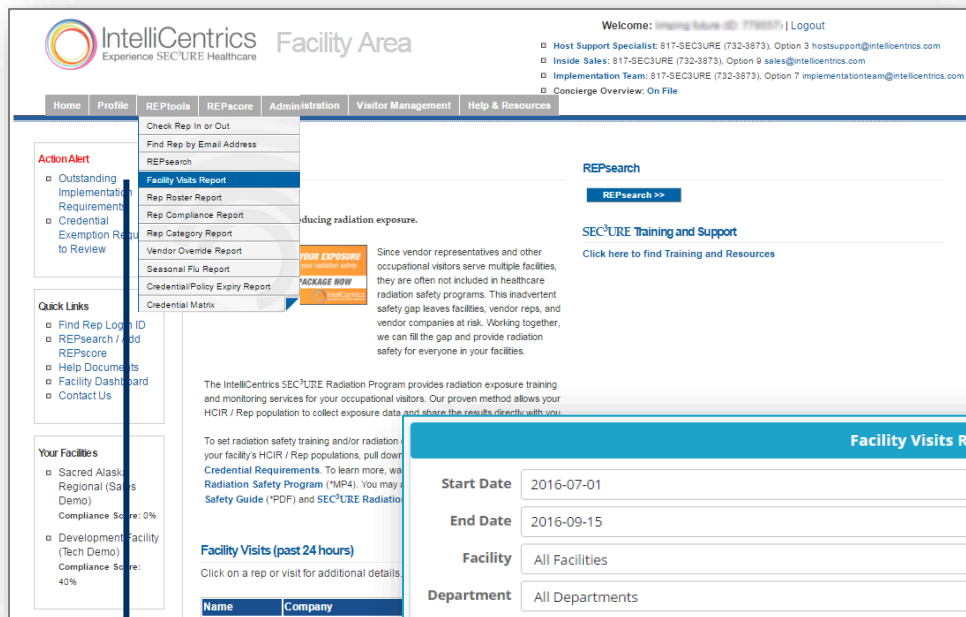

KEY TIPS for using the Facility Dashboard charts:

- *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's SEC³URE data.*
- *Hover over ℹ to display chart Help tooltips.*

Use the SEC³URE reporting tools, under your **REPtools** menu, to dig further into the occurrences in your facilities.

Review facility traffic and examine industry trends

Select series labels to add or remove comparative data

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*.

In SEC³URE, pull down the **REPtools** 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 (*Export to *Excel/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 next to each HCIR/Rep to:

- Review the individual's 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

Select healthcare professional to perform an action

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

Rep / Vendor Roster Report

Use this report to view all the Vendor Reps associated with your facilities. This is a quick way to sort, select, and then **Perform Action** on groups of HCIRs all at one time.

In SEC³URE, pull down the **REPtools** menu and then select **Rep Roster Report**. Use the *Show* dropdown show from **10** to **All** results.
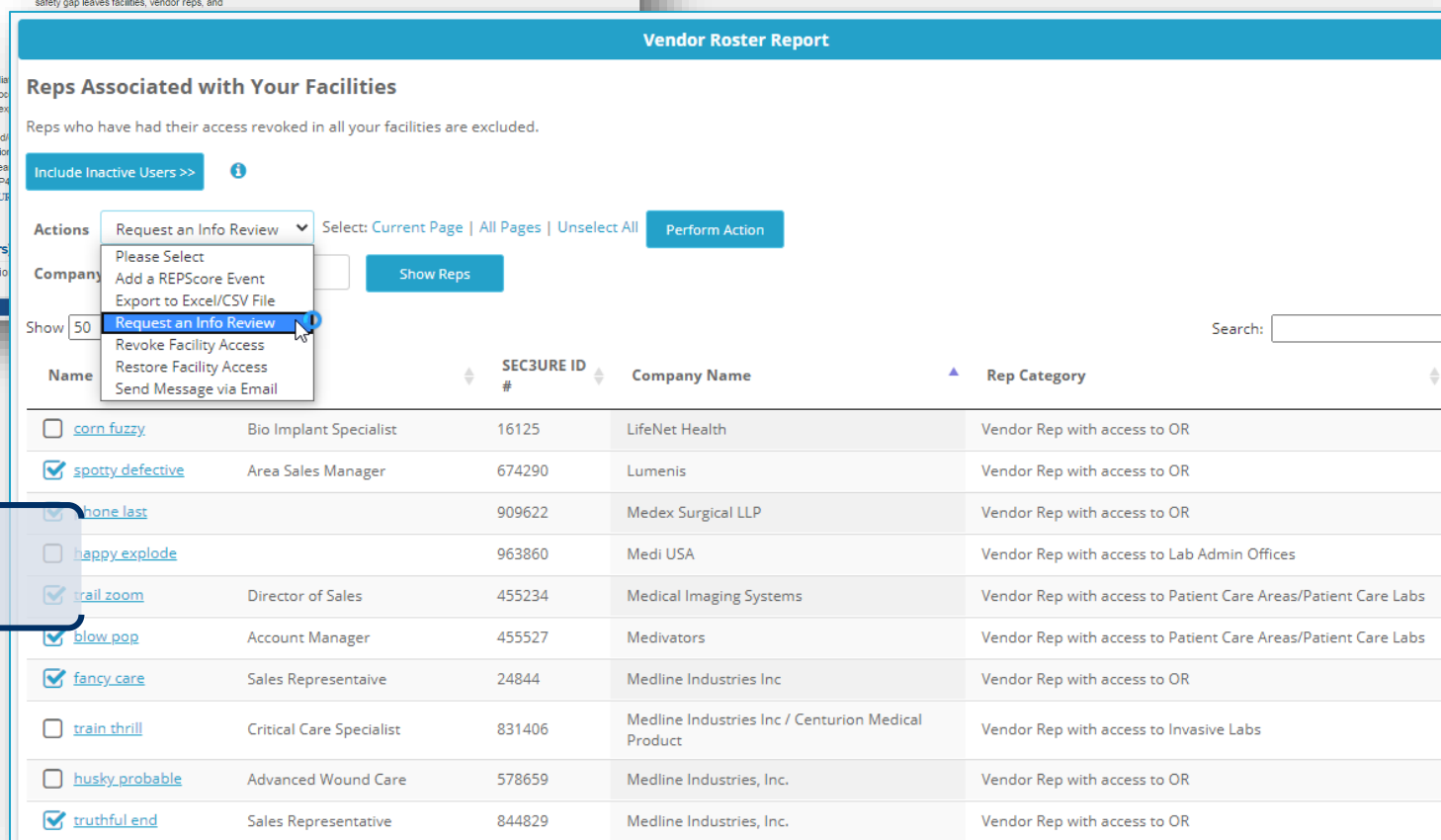
Use Type-ahead **Search** to narrow the results listed in the table. Sort the results ▲ *ascending* or ▼ *descending* by selecting the column headers.

Use the dropdown to perform **Actions** for the selected reps:

- Add a REPScore Event
- Export to Excel/CSV File
- Request and Info Review
- Revoke Facility Access
- Send Message via Email (REPblast)

KEY TIP: *Select or sort by* **Company Name** *to perform actions for all HCIRs / Reps representing one company.*

Rep Roster Report

Rep Compliance Report

This report shows compliance statuses of the Healthcare Industry Reps (HCIRs) with access to your facilities. Use this report to monitor and manage reps with potential compliance concerns.

Select Rep(s) and then take **Actions**

Select Facility & Rep criteria and **Search**

Rep's **Outstanding Credential Requirements**

In SEC3URE, pull down the **REPtools** menu and then select **Rep Compliance Report**. Select the various search criteria and then **Search**.

Use the **Show** dropdown under the *Rep Compliance* table to list from 10 to ALL results.

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

Select individual reps by checking their corresponding checkboxes or select the links to select all on just the **Current Page** or **All Pages**.

Use the dropdown to perform **Actions** for the selected reps:

- Add a REPScore Event
- Export to Excel/CSV File
- Request and Info Review
- Revoke Facility Access
- Send Message via Email (REPblast)

KEY TIP: *This report may take several minutes to complete if there are many HCIR / Reps included in the selected category.*

Rep Category Report

Use this report to quickly filter your facility's HCIR / Reps by categories. Reps place themselves in a rep category when they first register. You may easily select groups of reps and then quickly perform necessary actions.

In SEC³URE, pull down the **REPtools** menu and select **Rep Category Report**.

Use the **Show** dropdown under the *Rep Category* table to list from 10 to All results. The table lists the three most recent visits. Select **More…** to go to the Rep's Dashboard and view more Facility Visits.

Sort the results ▲ *ascending* or ▼ *descending* by selecting the column headers. Use Type-ahead **Search** to narrow the results listed in the table (e.g., by *Company Name*).

Select individual reps by checking their corresponding checkboxes or select the links to select all on just the **Current Page** or **All Pages**.

Use the dropdown to perform **Actions** for the selected reps:

- Add a REPScore Event
- Export to Excel/CSV File
- Request and Info Review
- Revoke Facility Access
- Send Message via Email (REPblast)

KEY TIP: *You can quickly locate and perform actions on all reps associated with a specific company by using type-ahead* **Search**.

Select Facility & Category criteria and **Search**

Type-ahead **Search**

View *Recent Visits* to this facility. **More…** to go to Rep Dashboard

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.

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 All 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.*

Credential / Policy Expiry Report:

Use the **Credential/Policy Expiry Report** to review HCIR / Rep compliance and facility entry status.

From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **Credential/Policy Expiry Report**

b) Select the specific **Facility**, and then choose from the other report parameters (*look specifically for **Credential: Radiation Exposure***) and then the **Show Reps >>** button
Note: *This report may take several minutes depending on the number of HCIRs / Reps attached to the facility.*

This report may take several minutes to compile and display results.

In the results table, you may:

- Select the name to view the individual's Rep Dashboard
- Check the names and then **Perform Action** on those selected HCIRs / Reps (*Export results to Excel/CSV, Add REPscore Event, Request Info Review, Revoke Facility Access, or Send Message via Email – "REPblast"*)

KEY TIP: *Click on the column names to sort the results ▲ ascending or ▼ descending.*

KEY TIP: *Use your browser's Search/Find feature to locate any credentials or policies expiring in the next 30 days.*

Facility REPScore Report:

This report shows you the vendor supplier reps who have events at the selected facilities along with the REPScore at those selected facilities.

From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **Facility REPScore**

b) Select the specific **System**, **Division**, and/or **Facility**. You may also select a specific Company.

c) Select **Search**

In the results table, you may:

▪ Select the rep ID to view the individual's Rep Dashboard
▪ Check the names and then **Perform Action** on those selected HCIRs / Reps (*Export results to Excel/CSV*)

KEY TIP: *Click on the column names to sort the results*
▲ ascending or ▼ descending.

Select Facility & Company criteria and then **Search**

Select Rep(s) and then **Perform Action**

Average Facility REPScore Report:

Use the Average Facility REPScore Report to show the average REPScore for all events at the facility for all facility(s) the Host Admin is connected to.
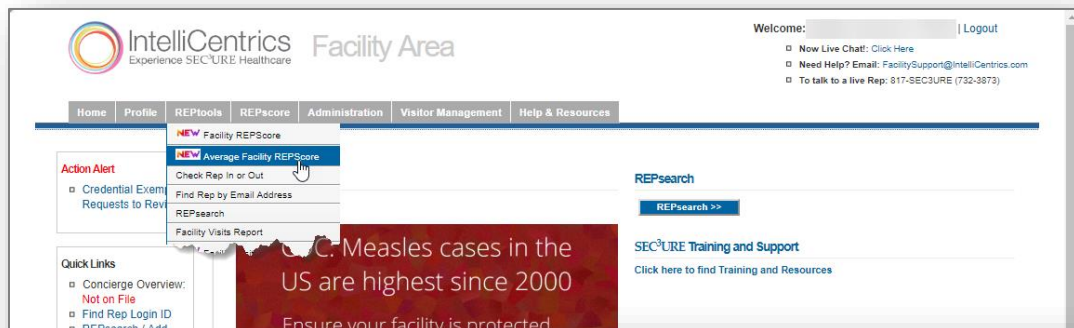
From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **Average Facility REPScore**

b) Sort the facilities by the types of events or by the average facility REPScore

In the results table, you may check the facilities and then **Perform Action** (*Export results to Excel/CSV*)

Click the column headers to sort *ascending* and *descending*

Select Facility(s) and then **Perform Action**

Facility Radiation Exposure Report:

The **Facility Radiation Exposure Report** shows you HCIR / Rep compliance for both *Radiation Exposure* and *Radiation Training* credentials in your facilities. Monitor your HCIR / Rep populations and quickly respond to radiation exposure events.

From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **Facility Radiation Exposure Report**

b) Select the specific **Facility**, choose any of the other report parameters and then **Search**.

In the results table:

▪ Green checkmarks indicate the Rep is compliant for either the *Radiation Exposure* and/or the *Radiation Training* credentials.

▪ Select the name to launch the individual's Rep Dashboard and then **View Existing Credentials**

▪ Check the names and then **Perform Action** on those selected HCIRs / Reps (*Export results to Excel/CSV, Add REPscore Event, Request Info Review, Revoke Facility Access,* or *Send Message via Email*)

Select Facility & Rep radiation criteria and **Search**

Look for **green** ✓ and **red X** to denote radiation compliance

KEY TIP: *This report shows only facilities with radiation exposure or radiation training credentials as a requirement.*

NRC ALARA Guidelines	Yearly & Quarterly Limits	
Body DDE	> 5,000 mrem yr.	> 1,250 mrem qtr.
Eye LDE	> 15,000 mrem yr.	> 3,750 mrem qtr.
Extremity SDE	> 50,000 mrem yr.	> 12,500 mrem qtr.

Seasonal Flu Report:

A common goal of both The Joint Commission (TJC) and the U.S. Department of Health and Human Services (HHS) is to prevent the spread of influenza in healthcare settings by continually increasing the vaccination rates of healthcare personnel.

The **Seasonal Flu Report** displays the vaccination status of a wide range of individuals who checked into your facility including contracted personnel, healthcare industry reps, volunteers, students and other nonemployees who work in the facility within patient care areas.

From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **Seasonal Flu Report**

b) *For the current season*: Select the **Facility** and then **Display Snapshot Report >>**

c) *For a prior year's flu season*: Select a prior flu season in the left navigation links, select a **Facility**, and then **Display Snapshot Report >>**

In the *Seasonal Results* table:

- The overall vaccination rates
- The number and percentage of **Vaccinated** (green)
- **Non Vaccinated** (red/orange) rates by:
  a) **No Credential** submitted
  b) **Declined** vaccination
  c) **Medical Exemptions**
  d) **Religious Exemptions**

KEY TIP: *The original TJC and HHS seasonal goal was a 90% rate by 2020. While that element of performance goal has been retired, The Joint Commission still advises:* "*organizations should continue to strive to increase compliance with influenza vaccinations and take action to improve vaccination rates.*"

Select **Facility** and then **Display Snapshot Report >>**

Vendor Type	Vaccinated	Non Vaccinated				
		No Credential	Declined	Medical Exemption	Religious Exemption	= Total
Clinical Contract Provider with access to OR/Patient Care Areas	1 (50.0%)	1 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (50.0%)
Vendor Rep with access to OR	2 (33.3%)	4 (66.7%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	4 (66.7%)
Tissue Rep with access to OR	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Facilities Management with access to Facility	0 (0.0%)	2 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (100.0%)
Delivery Person with access to Facility	0 (0.0%)	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (100.0%)
Vendor Rep with access to Lab Admin Offices	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Service Tech/Manager with access to OR	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Pharmaceutical Rep/Manager with access to Facility	0 (0.0%)	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (100.0%)
Totals	6	9	0	0	0	0

COVID-19 Questionnaire Report:

If this has been enabled for your facility(ies); the **COVID-19 Questionnaire Report** shows you if healthcare professionals have answered the COVID-19 question, *either* "Yes" or "No," every time they have checked-into the facility.

From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **COVID-19 Questionnaire Report**

b) Select the **Start** and **End Date** range (*after* January 2021)

c) Select the specific **Facility** or *ALL Facilities*

d) Select a specific **User Type** (*Rep Category*) or leave as *All User Types*

e) **Show Responses >>**

In the *Questionnaire Responses* results table:

- It lists every instance a rep checked-into the facility(ies)
- The responses every rep chose at every check-in
- Select a Rep name to launch the individual's Rep Dashboard and then take any necessary actions
- Select **Export Responses to Excel/CSV >>** to create a snapshot report

For more information about boosting COVID-19 efforts: [Complete COVID-19 Compliance with SEC³URE](#)

If the facility does not currently have the COVID-19 Questionnaire enabled at check-in, contact your IntelliCentrics Hero today.

KEY TIP: *Sort the results table ascending / descending by clicking once or twice in the column headings.*

Credential Matrix:

This report allows facility System or Division administrators to view and compare the credential settings for each facility. Use the SEC³URE Credential Matrix to audit and review current settings, gain additional insight into inconsistencies, and monitor facility level settings so you may further reduce risks.

From your SEC³URE Home:

a) Pull down the **REPtools** menu and select **Credential Matrix**

b) Select the specific **Rep Category/Exposure Factor:** and then **Show**

In the results matrix for that specific Rep Category:

- The **SEC³URE Community Standard** credential set is provided as a 'baseline' to compare with your facilities.
- The facilities listed or categorized within the system or division
- All the credential requirements are listed across to the right of the report – *scroll all the way to the bottom of the table to access the horizontal scroll*

The Credential Matrix works best when exported as an Excel/CSV file. Select either:

- **Export to Excel/CSV File**
  Exports just the Rep Category displayed
- **Export All to Excel/CSV File**
  Exports ALL Rep Categories for ALL facilities

🎬 *Watch the* SEC³URE Credential Matrix video *to see it in action*

KEY TIP: *Credential listed with an asterisk* means Declinations/Attestations accepted.*

Reports: Available Actions

Add REPscore Event to document rep behaviors

Export (*Rep Details*) to Excel/CSV File

Revoke or **Restore Facility Access** for one or many selected

Send Message via Email (*goes to Rep's email*)

REPblast

Request an Info Review
Rep(s) will need to follow-up with you directly

Add Repscore Event (Actions panel)

Document positive or negative behavior by the reps listed below. They will be notified of this action via email.

Event Type * ● Positive Event ○ Negative Event

Event Description * Practiced proper hand washing procedures

Facility Sacred Alaska Regional (Sales Demo)

Event Note: We wanted to acknowledge your actions to prevent HAIs in our facilities. Thank you!

Your note will be viewed by the rep.

☐ Include Outstanding Requirements

[Add REPscore]

Selected Users

Please note: You can only assign a REPscore event twice per rep, per facility, per day. If you exceed that limit for a rep, the action will be skipped

Show 10 entries   Search:

Name	SEC3URE ID #	Today's Existing Actions
John Musachia	81	
John Vendor		

Export to Excel/CSV File (Actions)

Use this page to export the rep details listed below to Excel. You can choose whether or not to include outstanding requirements. After you click on Export to Excel/CSV, you will be prompted to Open/Save a CSV file.

* Indicates required field

Terms of Use * ☑ As previously agreed to in the SEC3URE Terms of Use, I certify I will not use this function except for the expressed purpose of Credentialing.

Include Outstanding Requirements ○ No ● Yes for facility: Sacred Alaska Regional (Sales Demo)

Please note: It may take additional seconds to generate the report if outstanding requirements is selected.

[Export to Excel/CSV File]

Revoke Facility Access (Actions)

Revoke facility access for the reps listed below. When reps' access is revoked, they will be notified of the action by email and will not be able to check in until their access is restored.

* Indicates required field

Facility: Sacred Alaska Regional (Sales Demo)

Note: Though the chocolate muffins were absolutely delicious, please review facility entry requirements; esp., "Vendor Credential Overrides" and "Gifting"

Please contact Tanisha McFadden with any questions or concerns. Thank you for your cooperation.

Selected Users

Please note: You can only revoke a rep's access once per facility, per day. If you exceed that limit for a rep, the action will be skipped.

Show 10 entries

Name	SEC3URE ID #	Today's Existing Actions
Sally Cleary	751280	

Request an Info Review (Actions)

Request an info review from the reps listed below. The Rep(s) will be emailed the review document selected, and receive weekly reminders that it is outstanding. They must return it to you per the instructions contained within the date you select. If the review is not marked as received by this date, they will lose access to your facility until

Facility: Sacred Alaska Regional (Sales Demo)

Review Document *: Questionaire

Date Required *: 2016-11-30

Selected Users

Please note: You may only have one open review request for each rep. Any new requests will overwrite previous ones. You [...] per day.

Show 10 entries   Search:

Name	SEC3URE ID #	Today's Existing Actions
Musachia	81	

Send Message via Email (Actions)

Send a custom email message to the reps listed below.

* Indicates required field

From: Tanisha McFadden <tmcfadden@sacredregionalsalesdemo.com>

Facility: Sacred Alaska Regional (Sales Demo)

Send Copy: ☑ Send a copy of this email to: 378557@reptrax.c[...]

Message Salutation: ☑ Include: "Dear < First Name Last Name >,"

Message Body *: Please note that Sacred Alaska Regional is undergoing construction to the main facility. Please re-route your parking choice to the SOUTH parking lot off of Centennial Street and use the temporary kiosk in the Maynard Building (Bldg. #3) Purchasing entrance.

Thank you for your cooperation!

Message Footer: Message sent from: < Facility Name >
IntelliCentrics – Experience SEC3URE Healthcare
www.IntelliCentrics.com
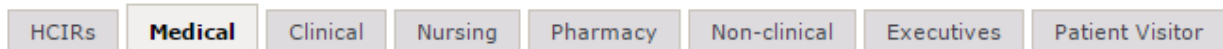
[Send Message]

Selected Users

📞 Support

For additional facility support, please call us at 817-SEC3URE (732-3873), fill out an online [support inquiry](#), or contact an [IntelliCentrics Hero](#) directly.
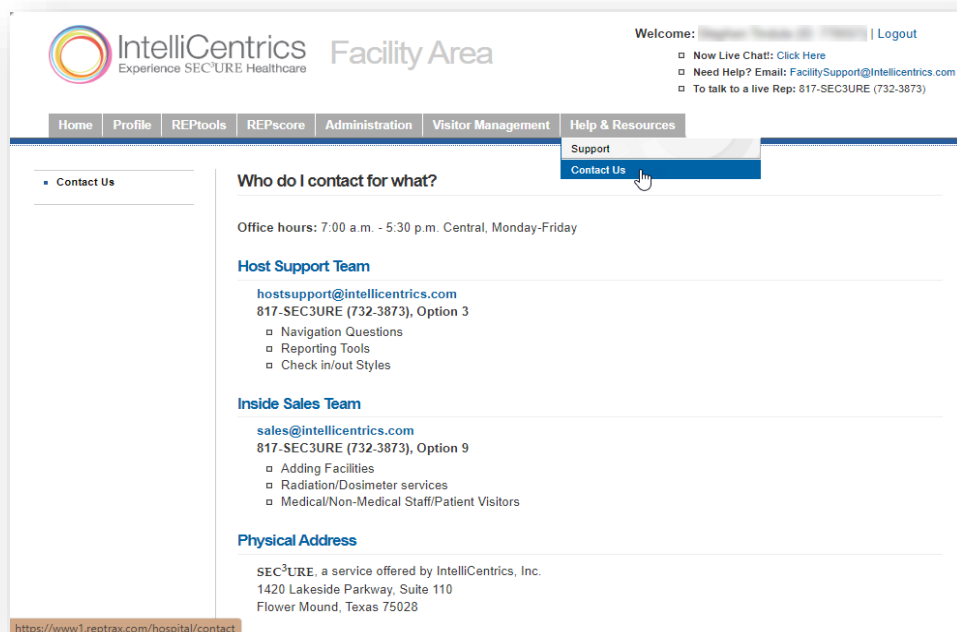
Additional Facility Roles:

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.