

# Welcome Packet



**HEALTHCARE QUICK START**  
VERSION

REFERENCE GUIDE



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# 1 Welcome

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Thank you for selecting HID SAFE, your reliable partner in optimizing physical identity and access management within healthcare settings. We are excited to assist you in your mission to provide outstanding patient care while adhering to the highest safety and compliance standards.

In today's intricate healthcare landscape, efficiently managing the flow of patients, visitors, contractors, and vendors is essential to operational effectiveness and safeguarding everyone involved. HID SAFE was designed precisely for this purpose.

With HID SAFE, your hospital teams can:

- Enhance front desk operations and improve the visitor experience with user-friendly self-service kiosks, web portals, and mobile check-ins.
- Ensure compliance with CDC, Joint Commission, HIPAA, and local health department regulations through standardized policies, audit trails, and on-demand reporting.
- Boost safety with watchlist alerts and responsive measures that protect your environment.
- Allow patients to set their visitation preferences, giving them more control over who enters their care area.
- Obtain crucial insights through customizable reports, facilitating informed decision-making and regulatory compliance.

HID SAFE adapts to your needs for single locations or extensive hospital networks. Its versatile architecture seamlessly integrates with existing systems, such as Microsoft Active Directory, HL7 interfaces, SSO platforms, access control systems, and background check services, allowing you to get started quickly.

We are privileged to accompany you toward a safer, more innovative, and secure healthcare environment. Together, let's redefine what is possible.

Welcome aboard,

The HID SAFE Team

## 2 Features

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We cannot wait for you to enjoy HID SAFE and its features. Here are a few things to look forward to:

### Automated Visitor Management

The application automates check-in and manages visitor identities to enhance security and enforce compliance. This automation not only lowers costs but also speeds up the delivery of a safe and secure visitor management system. By reducing the need for manual intervention, the processes ensure that visitor management remains efficient and adheres to regulations.

### Visitor Management Functionalities

The application enables check-in for inpatient visitors, accommodates walk-in visits, and permits the addition of pre-approved visitors, significantly enhancing the visitor experience. This feature streamlines visitor flow management, simplifying check-in for visitors and enabling staff to efficiently handle visitor information. Ultimately, this leads to an improved experience for both visitors and staff.

### Patient Privacy

HID SAFE can hide patients from the visitor reception desk search results, ensuring compliance with healthcare regulations and preserving patient privacy. Protecting patient privacy is vital in healthcare environments, and this feature plays a key role in maintaining confidentiality.

### Archiving

Archiving for terminated identities, checked-out visitors, HL7 messages, patient information, and audit logs. This practice ensures adherence to data retention policies, improves data management, and supports secure record-keeping in compliance with regulations.

### Predefined Healthcare-Specific Reports

Over 10 preset healthcare reports provide vital insights to aid informed decision-making. These predefined reports allow healthcare facilities to quickly access crucial data and make decisions based on accurate information.

# 3 Roadmap

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Here is a look at the road ahead. Below, we have outlined your path with HID SAFE, every step of the way. Look at that, you have already started!

| Complete | Task                                |                                         |
|----------|-------------------------------------|-----------------------------------------|
| √        | Contract Signed                     |                                         |
|          | Kickoff Call                        | Meet our Professional Services team     |
|          | Hardware and Software System Design | Get your installation plan into place   |
|          | Hardware and Software Installation  | Install the software                    |
|          | Configuration of Interfaces         | Configure SAFE to your liking           |
|          | User Acceptance Testing             | Test the system and accept its delivery |
|          | Training                            | Teach everyone about SAFE               |
|          | Go-Live Checklist                   | Crossing our t's and dotting our l's    |
|          | Implementation & Go-Live Support    | Go live with our help!                  |
|          | Transition to Technical Support     | The project has ended, congratulations! |
|          | Ongoing Support and Maintenance     | Reach out if you have any questions!    |

# 4 Terms

Through this project, you'll encounter many new terms. Here are a few to help you begin and feel more at ease.

| Name                                            | Description                                                                                                   | Abbreviation            |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------|
| Customer Success Manager                        | Your voice within HID, aligning the business needs with the business capabilities of HID                      | CSM                     |
| Professional Services Project Manager           | Your project manager will help you implement SAFE                                                             | PS Project Manager (PM) |
| Professional Services Manager                   | Professional Services Manager – allocates resources and is the management point of contact for the project    | PSM                     |
| Technical Support Engineer                      | Your technical support guru will help you tackle any product challenges that may arise.                       | TSE                     |
| Professional Services Business Analyst          | Professional Services Business Analyst – responsible for mapping business requirements against SAFE workflows | PS BA                   |
| Professional Services Implementation Consultant | Professional Services Manager – responsible for the deployment and configuration of SAFE                      | PS IC                   |
| HID SAFE                                        | The System                                                                                                    | SAFE                    |
| Identities                                      | Patients and employees                                                                                        |                         |
| User                                            | Individuals with login credentials                                                                            |                         |
| Patient Visitors                                | Visitors linked to a patient                                                                                  |                         |
| Visitors                                        | All other visitors at the hospital                                                                            |                         |

## 5 Log In

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To access HID SAFE, enter your username and password issued by your administrator and click Sign In.



## 5.1 Accept our End User License

Upon your first log-in, you will be greeted by our End User License Agreement. Please scroll down the page and click Accept.

**HID GLOBAL CORPORATION**

### ON-PREMISE SOFTWARE END USER LICENSE AGREEMENT

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**"Purchase Documents"** means the invoice and/or other purchasing documentation or order acknowledgment issued by Licensor or Channel Partner.

**15 General.**

15.1 Licensee may not assign this EULA or any of its right hereunder without the prior written consent of Licensor. Any attempt by the Licensee to assign any rights, duties or obligations, which arise under this EULA without such permission shall be void.

15.2 Any waiver or forbearance shall be valid only if in writing. No waiver by a party of any default shall operate as a waiver of any other default or of the same default on a future occasion. No delay, course of dealing or omission on the part of one party in exercising any right or remedy shall operate as a waiver thereof, and no single or partial exercise by such party of any right or remedy shall preclude any other or further exercise thereof or the exercise of any other right or remedy.

15.3 If any provision or provisions of this EULA shall be held to be invalid, illegal or unenforceable, the validity, legality and enforceability of the remaining provisions shall not in any way be affected or impaired thereby, provided such provisions still express the intent of the parties. If the intent of the parties cannot be preserved, the EULA shall either be renegotiated or rendered null and void.

15.4 No remedy conferred by this EULA is intended to be exclusive of any remedy, except as expressly provided, and each and every remedy shall be cumulative and in addition to every other remedy given under this EULA or now or in the future existing in law or in equity or by statute or otherwise.

15.5 This EULA is not made for the benefit of, nor shall any of its provisions be enforceable by any person other than Licensor, Licensee and their respective successors and permitted assignees.

15.6 This EULA shall be construed and interpreted in accordance with the laws of the State of Texas, USA. Any action, suit or proceeding relating to this EULA may be brought in the appropriate court located in Travis County, Texas and each party hereby consents to such jurisdiction. The provisions of the United Nations Convention on Contracts for the International Sale of Goods will not apply to this EULA or any order issued hereunder.

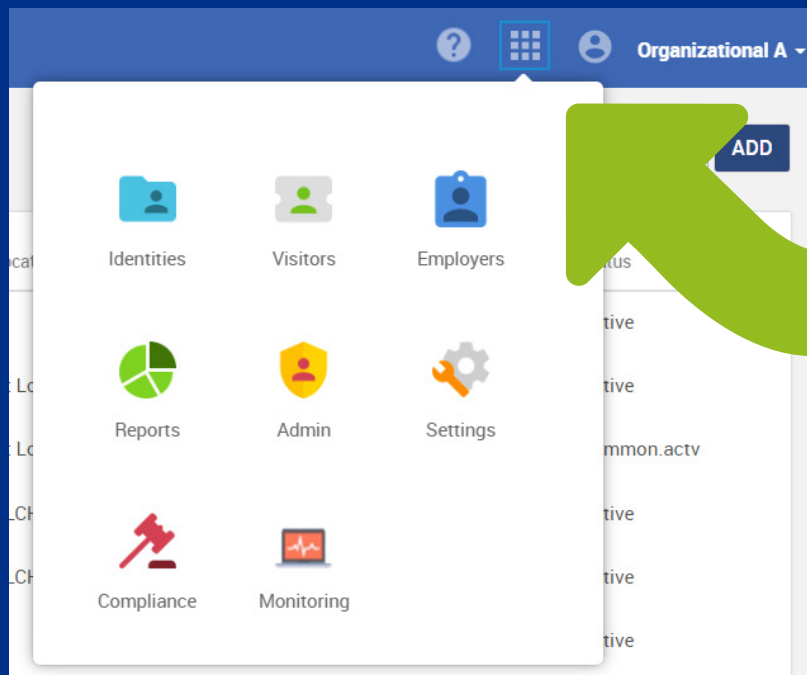
15.7 Unless otherwise agreed in writing by the parties, this EULA constitutes the entire understanding and agreement between the parties hereto with respect to the subject matter of this EULA and merges and supercedes all prior communications, understanding and agreements, written or oral. Any modifications to this EULA must be in writing and signed by a proper and duly authorized representative of the party to be bound thereby. Licensor shall not be bound by any differing or inconsistent terms contained in any order form, purchase order or other form issued by Licensee.

**DECLINE ACCEPT**

Showing 1-10 of 14 results

## 5.2 Navigation

Use the App-Switcher (nine-dot-waffle icon) to access different functions of the product. Simply click on an application icon to perform tasks related to that function. Different roles will see different applications.



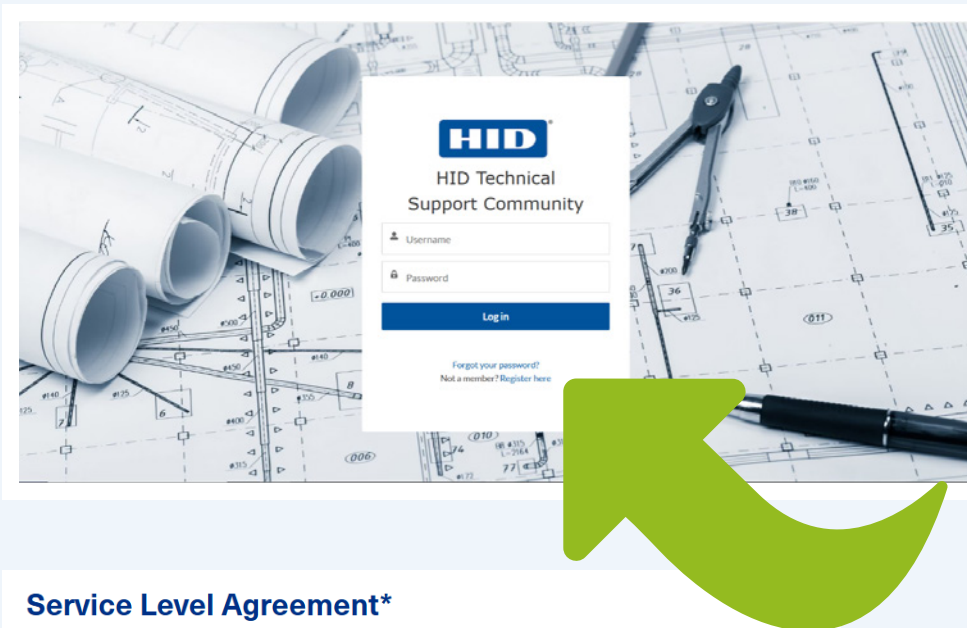
| Application       | Icon | Application Function                                                    |
|-------------------|------|-------------------------------------------------------------------------|
| <b>Identities</b> |      | Manages all Employee and Patient information.                           |
| <b>Visitors</b>   |      | Manages the visitor check in, check out, and badging processes.         |
| <b>Employers</b>  |      | Manages employers that also utilize a shared working space.             |
| <b>Reports</b>    |      | Manages reporting and reporting dashboards for SAFE Data.               |
| <b>Admin</b>      |      | Manages SAFE configurations and access controls.                        |
| <b>Settings</b>   |      | Manages SAFE settings and preferences.                                  |
| <b>Compliance</b> |      | Manages attestations, access privileges and alerts.                     |
| <b>Monitoring</b> |      | Lists schedule logs, user sessions, and mail actions performed in SAFE. |

# 6 Support & Help Resources

Your Customer Success Manager (CSM) will be the first point of contact if you need help. They are here to support you on your journey and ensure you have everything you need to succeed.

Also, you will want to register for our [Technical Support Community](#) to monitor all cases related to your implementation and ongoing support.

It is important to be aware of the support terms and conditions and the appropriate stages of the product lifecycle. Please familiarize yourself with the [‘support T&Cs’](#) and [‘product lifecycle pages’](#).



## Service Level Agreement\*

|                                    |   | Platinum                                                           |                  | Gold                                                               |                  | Silver                |                  |
|------------------------------------|---|--------------------------------------------------------------------|------------------|--------------------------------------------------------------------|------------------|-----------------------|------------------|
|                                    |   | Priority 1 — 24/7 Coverage<br>Priority 2-4 — During Business Hours |                  | Priority 1 — 24/7 Coverage<br>Priority 2-4 — During Business Hours |                  | During Business Hours |                  |
| Case Submission 24/7 via Community |   | ✓                                                                  |                  | ✓                                                                  |                  | ✓                     |                  |
| Phone Support for Priority 1 Cases |   | ✓                                                                  |                  | ✓                                                                  |                  | ✓                     |                  |
| Access to Latest Software          |   | ✓                                                                  |                  | ✓                                                                  |                  | ✓                     |                  |
| Priority Levels                    |   | First Response                                                     | Update Frequency | First Response                                                     | Update Frequency | First Response        | Update Frequency |
|                                    | 1 | 30 min<br>24/7                                                     | 3 hrs<br>24/7    | 1 hr<br>24/7                                                       | 6 hrs<br>24/7    | 1 hr                  | 8 hrs            |
|                                    | 2 | 1 hr                                                               | 8 hrs            | 4 hrs                                                              | 16 hrs           | 12 hrs                | 16 hrs           |
|                                    | 3 | 4 hrs                                                              | 24 hrs           | 24 hrs                                                             | 24 hrs           | 24 hrs                | 48 hrs           |
|                                    | 4 | 24 hrs                                                             | 48 hrs           | 48 hrs                                                             | 48 hrs           | 48 hrs                | 48 hrs           |

\*The Platinum Support SLA is available only for select IAMS offerings.

# 7 Training Opportunities

We offer various training options beyond what is included in your contract. If you're looking to acquire the necessary knowledge and resources or enhance your team with the expertise of an Organizational Administrator, you can select from the training packages listed below. Check out the agenda to discover what you will learn!

| SKU                                                   | Description                        | Learner Count |
|-------------------------------------------------------|------------------------------------|---------------|
| <b>Self Paced</b>                                     |                                    |               |
| PS43S-QS-1                                            | Single User Online                 | 1             |
| PS43S-QS-2                                            | Group Online                       | Up to 4       |
| <b>Instructor Led Online</b>                          |                                    |               |
| PS43C-QS-1                                            | Public Group Session (1 seat)      | 1             |
| PS43C-QS-2                                            | Private Group Session              | Up to 5       |
| <b>Instructor Led In Person (Travel not included)</b> |                                    |               |
| PS43I-QS-1                                            | Public Group Session (HID HQ, ATX) | 1             |
| PS43I-QS-2                                            | Private Group Session              | Up to 8       |

|                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>HID</b>                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                       |
| <b>SAFE Organizational Administrator Agenda</b>                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                       |
| <b>Unit 1</b> Configuration                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                       |
| <ol style="list-style-type: none"><li>1. User Interface Elements</li><li>2. Settings Application</li><li>3. Admin Application<ol style="list-style-type: none"><li>a. Master Data</li><li>b. Email Configuration</li><li>c. SMS Configuration</li></ol></li></ol>                                                                                          | <b>Learning Goals:</b><br>Tailor SAFE to meet your unique business needs. <ul style="list-style-type: none"><li>• Navigate and configure SAFE Settings.</li><li>• Set-up Master Data.</li><li>• Manage SAFE, SMS, and Email notifications.</li></ul>  |
| <b>Unit 2</b> Employees                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                       |
| <ol style="list-style-type: none"><li>4. Admin Application<ol style="list-style-type: none"><li>a. Users</li><li>b. User Roles</li><li>c. User Groups</li><li>d. Locations</li><li>e. Access Areas</li><li>f. Badge Types</li><li>g. Badge Designer</li><li>h. Acknowledgements</li><li>i. Documents</li></ol></li><li>5. Identities Application</li></ol> | <b>Learning Goals:</b><br>Manage personnel data and assign badge access. <ul style="list-style-type: none"><li>• Create and manage user access to SAFE.</li><li>• Manage employee identities.</li><li>• Manage facility access and badging.</li></ul> |
| <b>Unit 3</b> Businesses                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                       |
| <ol style="list-style-type: none"><li>6. Employers Application</li></ol>                                                                                                                                                                                                                                                                                   | <b>Learning Goals:</b><br>Manage vendors and their access workflows. <ul style="list-style-type: none"><li>• Create business profiles.</li><li>• Delegate profile administration.</li><li>• Manage business settings and workflows.</li></ul>         |

|                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Unit 4</b> Visitors                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                           |
| <ol style="list-style-type: none"><li>7. Admin Application<ol style="list-style-type: none"><li>a. All Tasks</li><li>b. Approvals</li><li>c. Notifications</li><li>d. Watchlist</li></ol></li><li>8. Visitors Application</li></ol>                                 | <b>Learning Goals:</b><br>Check in visitors and manage their access. <ul style="list-style-type: none"><li>• Host a visit (check-in and check-out).</li><li>• Manage your company's Watchlist.</li><li>• Manage approval tasks.</li></ul> |
| <b>Unit 5</b> Compliance                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                           |
| <ol style="list-style-type: none"><li>9. Admin Application<ol style="list-style-type: none"><li>a. Audit</li><li>b. All Attestation Tasks</li></ol></li><li>10. Compliance Application</li><li>11. Monitoring Application</li><li>12. Reports Application</li></ol> | <b>Learning Goals:</b><br>Audit, control access and generate reports. <ul style="list-style-type: none"><li>• Perform audits.</li><li>• View standard reports.</li><li>• Monitor system health.</li></ul>                                 |

# Revision History

|     | Revision | By        | Date       |
|-----|----------|-----------|------------|
| 1.0 | Creation | J. Robles | 07/04/2025 |
|     |          |           |            |
|     |          |           |            |
|     |          |           |            |