

Visitor Management

A Guide For Human Resource and EZVolunteer Administrators

EZVolunteer provides both volunteer and visitor management through separate modules in the system. The exact configuration of these two modules and the EZVKiosk depends on how your district wants to track each of these user types in you schools.

Volunteers go through a more comprehensive registration process, during which they can choose schools and activities they're interested in. They also go through a full criminal history check that flags their record and alerts district staff if anything is found during the screening process.

Visitors, on the other hand simply go through a sign-in process at a school's front office during which they provide only the information needed to complete a quick, nationwide Sex Offender Registry (SOR) check. Alerts are sent if a visitor is found to be on the SOR. Otherwise they are signed-in and a name tag can be printed, which can include a photo of the visitor.

Setting Up Visitor Management

To use visitor management in EZVolunteer there are several decisions and configuration steps that need to be made, both within the administrative console of the system and at each campus, if you are using the EZVKiosk to sign-in visitors.

School Logos

The EZVolunteer Visitor Module uses the school logo for each campus as a 'default' image to print on a visitor's nametag when they sign-in, if the school is not using the Capture Photo functionality. For this reason, it is important to upload the logos for each campus into the **Schools Module** of your system.

To do this follow these steps -

1. Sign-in to EZVolunteer and go to the Administration Console
2. On the page header go to Settings > EZVolunteer > Schools
3. From the list of schools click the campus for which you want to upload a logo
4. In the logo section click CHOOSE FILE
5. Select the image file logo for that school
6. Click the UPLOAD button and then SAVE to return to the school list
7. Repeat Steps 3 - 6 for all schools

Visit Purpose

You have the option of categorizing the purpose of a visit when a visitor signs in (or is signed-in) at a campus. Purpose is a way to track and and report why visitors are on-campus. Purpose will appear on ALL campus sign-in pages for consistency district-wide.

To add or update your Visit Purpose follow these steps -

1. Sign-in to the district administration console
2. Go to Settings on the page header and under EZVolunteer choose General Settings
3. Scroll to the bottom of that page and in the 'Purpose of Kiosk Visit' section
4. Type a Purpose, like 'Parent/Teacher Conf', and click the ADD button
5. Repeat Step 4 for each new Purpose. Be sure to include 'Other' or 'Miscellaneous' as an option
6. When done click the SAVE button at the bottom of the page

Purpose Of Kiosk Visit

Purpose Of Visit	Action
<input type="text"/>	
Campus Admin Meeting	Edit Delete
Parent / Teacher Conf	Edit Delete
STUDENT - Late Arrival	Edit Delete
STUDENT - Early Departure	Edit Delete
Other	Edit Delete

Page 1 of 1 (5 items)

Page size:

Enable Real-time Screening

To enable real-time screening of visitors you will need to contact your Relatrix account manager. This is an optional service that will require you to purchase credits to run the nationwide Sex Offender Registry (SOR) check on each new visitor.

Once enabled on your site you can specify a 'look-back' period so that a visitor who has already been checked is not re-checked for a set number of days.

Campus Kiosk Contacts & Configuration

If you will be using the EZVKiosk to sign-in visitors there are several decisions and settings that need to be configured for each campus. To access these settings go to Settings > EZVolunteer >

Campus Kiosks. Each campus using the EZVKiosk has it's own settings and needs to be configured separately.

Campus Visitor Contacts are the people or departments who receive alerts from EZVolunteer related to visitors at that school. There can be two visitor contacts for each campus and each contact can have an email and SMS/text channel to receive. You will need to decide who the visitor contact(s) will be, typically one contact at the school and one at district security.

In addition to setting up visitor contacts you need to decide how to configure the EZVKiosk for each campus. Detailed description of the Kiosk Setup is available through our Tip Sheets & How To documents which are accessible from the admin console.

The campus kiosk settings determine what functions are enabled on the school's EZVKiosk. These include -

1. **Barcode Scanning** - Check this box if you will be using a barcode scanner to sign-in volunteers and/or sign-out visitors you need to enable this function on the EZVKiosk. Requires a 1-D barcode scanner at the EZVKiosk computer.
2. **Visitor Manual Sign-in** - Check this box if you want to sign visitors into your kiosk.
3. **Volunteer Manual Sign-in** - Check this box if you want volunteers to sign-in with their account details in addition to, or instead of using a name badge with a barcode.
4. **Name Tag Printing** - Check this box if you want to print name tags for all visitors and volunteers who manually sign-in. Requires a label printer at the EZVKiosk computer.
5. **Photo Capture** - Check this box if you want to include photos of your visitors in the database and on the name tags you print for them. Requires a webcam at the EZVKiosk computer and/or the front-desk computer where school staff sign-in visitors.

Kiosk Settings - Demo Elementary	
Visitor Screening Contact - 1	
Name	Visitor Contact1
Primary Email	VisitorContact@relatrix.com
Mobile Phone (For Text Notification)	1234567890@txt.att.net <small>*Should look like a email. For example, 1234567890@attweb.email.net</small>
Visitor Screening Contact - 2	
Name	Visitor Contact2
Primary Email	Visitorcontact2@relatrix.com
Mobile Phone (For Text Notification)	0987654321@txt.att.net <small>*Should look like a email. For example, 1234567890@attweb.email.net</small>
Volunteer Screening Contact	
Name	Volunteer Contact1
Primary Email	VolunteerContact@relatrix.com
Mobile Phone (For Text Notification)	 <small>*Should look like a email. For example, 1234567890@attweb.email.net</small>
Kiosk Setting	
Barcode Scanning	<input checked="" type="checkbox"/>
Visitor Manual Sign-in	<input checked="" type="checkbox"/>
Volunteer Manual Sign-in	<input checked="" type="checkbox"/>
Nametag Printing	<input checked="" type="checkbox"/>
Photo Capture	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Accessing the Visitor Module

Visitors can sign-in to your campus via the EZVolunteer Kiosk (EZVKiosk) or they can be signed-in by the front office clerk from the Visitor Module. You can choose to take a photo of the visitor using an attached webcam and after they sign-in you can print a temporary name tag. Whether signed in via the EZVKiosk or the Visitor Module the visitor will be displayed in the Visitor Module the next time you view the list of visitors at a school.

To access the Visitor Module of EZVolunteer -

1. Sign-in to your account
2. Click **Admin**, in the upper-right corner of the page to get to the administration console
3. Choose **Visitors** from the left menu

If you do not see the Visitor Module on the left menu, please contact your district administrator or our customer service team (support@relatrix.com) for assistance.

In / Out	Last Name	First Name	Sign In	Sign Out	School	Purpose	DOB	SOR Status
	Denby	Giles	11/16/2016 9:37 AM		Demo Elementary	Parent / Teacher Conf	12/12/1975	Clear
	Visitor	Test	09/06/2016 12:51 PM		Demo Elementary	STUDENT - Early Departure	01/01/1980	Clear
	Franke	Mark	09/02/2016 8:51 PM		Demo Elementary	STUDENT - Late Arrival	01/01/1980	Clear
	Rodriguez	Carlos	08/29/2016 11:50 AM	08/29/2016 11:50 AM	Demo Elementary	Parent / Teacher Conf	06/21/1970	Clear
	Student	Elementary	08/23/2016 3:55 PM		Demo Elementary	STUDENT - Late Arrival	01/01/2005	Clear
	Washington	George	08/02/2016 4:58 PM		Demo Elementary	Campus Admin Meeting	01/01/1900	Clear
	Jobs	Steve	08/01/2016 5:50 PM		Demo Elementary	Guest Tour	01/01/1900	Clear
	Franke	Mark	07/31/2016 4:00 PM		Demo Elementary	Pickup / Drop-off Student	01/01/1900	Clear

By default the visitor module will display all visitors for 'This Week' and will sort them in reverse chronological order (newest visitor at the top).

You can shorten the date range to 'Today' or lengthen the date range to 'This Month' or 'This School Year' to display more or less visitor records. Those records displayed include both visitors who signed themselves in via the EZVKiosk and those who were signed in from the Visitor Module using the **Add Visitor** button. If a visitor has been signed-in to your school before you can look them up on your list and sign them in again without having to complete a new sign-in form.

The primary workflow associated with the Visitor Module is to Sign In visitors when they enter the school, so there's a record of them being on-campus; Screen Visitors as part of the sign-in process to ensure they are not on the national Sex Offender Registry (SOR); and Sign out visitors when they leave campus.

In addition, you can add comments about visitors to your school; send alerts from the Visitor Module if there is a security concern at your front desk; re-submit a visitor for screening if the system was unable to complete the SOR check from the information provided; and report on the visit history at your school or district-wide

NOTE: Visitors in the database have a record that is used to track their visit to any school in the district. This means when they sign-in at a school the front office staff can see the last school and date when they visited a district campus. It also means the front office staff can see any comments placed on the visitor's record by staff at other campuses.

Signing In Visitors

There are three methods to sign-in visitors within the EZVolunteer Visitor Module. These include -

1. **Visitor Self Sign-in:** This method allows the visitor to complete a short online form that requires them to input their name, date-of-birth, phone number and select a purpose for their visit. Visitors can also take a photo (if photo capture is enabled) that is stored with their record and printed on the nametag they use to sign out.

NOTE: As a best practice, if you are using Real-time Screening of your visitors you should instruct them to have Front Office staff sign them in the first time so their ID can be verified against the information on their record.

2. **Front Office Sign-in:** This method uses the ADD VISITOR button and involves the front office staff taking the Photo ID of the visitor and inputting their First/Last Name and Date-Of-Birth into the system, along with the purpose of the visit. They can also capture a current photo of the visitor to print on their nametag.

NOTE: If the ADD VISITOR button is used and EZVolunteer finds the visitor in the database, the system will pull-up that record and the front office staff can sign-in the existing visitor. This record will show the last school and date when the visitor signed in.

3. **Front Office Re Sign-in:** If a visitor has been into the school before the front office staff can search-by-name in the visitor module and use the Sign-In icon to sign-in the visitor without entering their information again.

NOTE: When signing in a visitor a second or subsequent time at your school the front office staff can (re)take a photo of the visitor using the UPDATE button and/or change the purpose of the visit to reflect that day's visit.

The Best Implementation For Visitor Management

There are several choices to make about implementing visitor management in EZVolunteer. The best option will depend on security and HR policies at your district and how well your schools adapt to a change in process. From experience, there are several points to consider before making your decisions:

1. **Will you be using Real Time Screening of visitors?**

If you use Real Time Screening then you should implement the system so the first-time a visitor signs-in they do so using the Front Office Sign-in method. Front office staff should ask for the visitor's ID and input their Name and Date-Of-Birth using the Add Visitor button. In addition, if the system is unable to complete the SOR check the front office staff can re-submit the check with the additional information required and proceed with printing a nametag.

2. Do you want to capture photos of visitors?

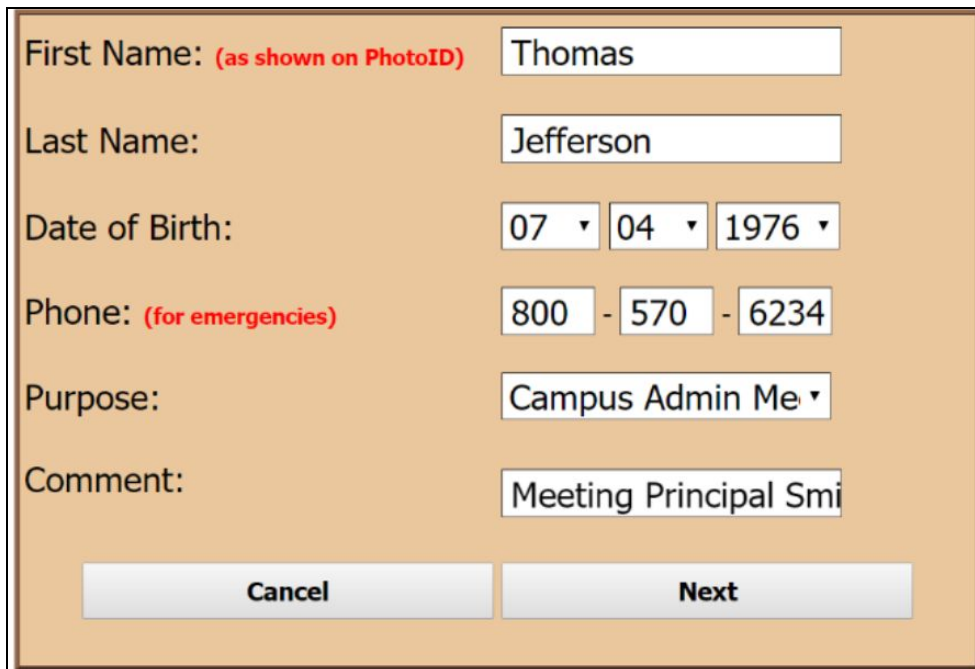
Photos are useful because they are printed on the nametag of the visitor and are stored in the database so if the visitor goes to a different school their photo goes with them and can be verified by front office staff. If you are going to capture photos you will need a camera on the computer where the visitor is initially signing-in - either the EZVKiosk or the front office staff computer.

3. Will you be printing name tags for visitors?

If you plan to print name tags for visitors to wear you will need a label printer. As a security measure it is usually best to keep the printer behind the front desk so that front office staff can verify the name tag for the visitor, whether they are using the self sign-in or front-office sign-in method.

Visitor Self Sign-in

For visitors who are signing-in for themselves the EZVKiosk allows them to view the visitor sign-in page in English or their native language (if you have Google Translate enabled on your EZVolunteer site). They will need to input their name, date-of-birth, phone number and select the purpose of their visit, after which they can click NEXT or push the keyboard ENTER button.



The screenshot shows a visitor self-sign-in form with the following fields and values:

First Name: (as shown on PhotoID)	Thomas
Last Name:	Jefferson
Date of Birth:	07 / 04 / 1976
Phone: (for emergencies)	800 - 570 - 6234
Purpose:	Campus Admin Me
Comment:	Meeting Principal Smi
<div>Cancel</div> <div>Next</div>	

If the **Photo Capture** option is enabled on the Campus Kiosk settings, the next page will display with the webcam active and the visitor will need to stand in-front of the camera so their face is

clear and centered in the window on the page. When ready they click the Capture & Print button or press the keyboard ENTER key.

If the **Photo Capture** option is disabled on the Campus Kiosk settings, this page will not display and instead the system will proceed to printing the name tag and displaying the Thank You page, after which it will return to the EZVKiosk sign-in page in 10 seconds.

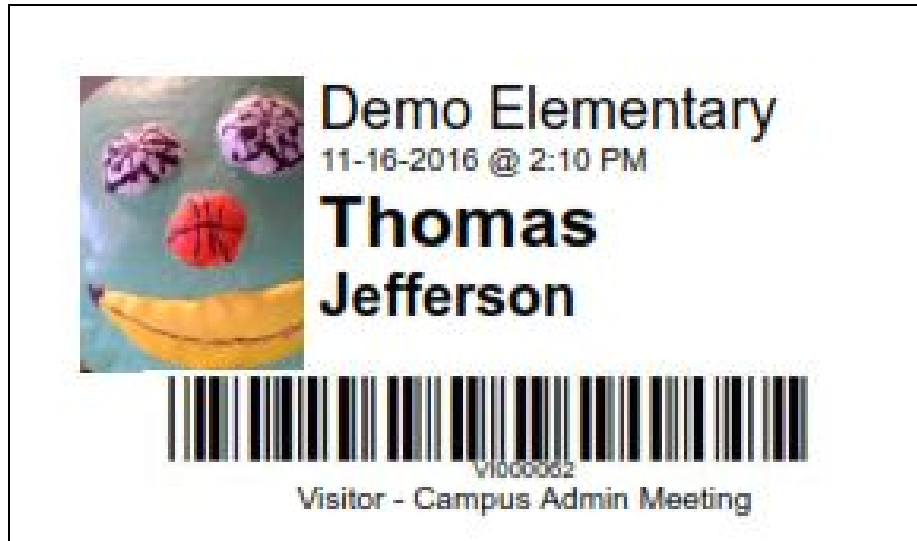


If the visitor has signed in via the EZVKiosk or been signed in by front office staff at this school or any other school in the district before, a page with their details will display, verifying the information and displaying the last school and date when they signed-in.

A screenshot of a kiosk interface for user verification. On the left is a small version of the green alien head image. To its right are several fields: "Name: Thomas Jefferson", "DOB: 07/04/1976", "ICE: 800-570-6234", "Date: 11/16/2016", "Location: Demo Elementary", and "Purpose: Campus Admin Meeting" (with a dropdown arrow). At the bottom are three large white buttons: "Cancel", "Update", and "Next".

They can update their photo and the purpose of their visit on this screen, and click NEXT when ready to print out their name tag.

The name tag will be spooled to the local label printer for the EZVKiosk. The visitor should be asked to place the name tag in an easily visible location on their blouse or shirt and keep it on at all times while in the building.



Front Office Sign-in

This sign-in method operates almost exactly the same as the Self Sign-in method, except a front office staff member would be pushing the buttons. To operate visitor management with this method the front office staff would ask visitors (at least first-time visitors) to present their photo ID. They would then follow these steps -

1. From the Visitor Module click the ADD VISITOR button
2. Input the Name and Date-Of-Birth of the visitor
3. Input the Phone number and select the stated Purpose of the visit
4. If the Photo capture feature is enabled ask the visitor to stand in-front of the webcam and capture a photo
5. Click the NEXT button, after capturing a photo to print the visitor name tag.

Front Office Re Sign-in

If front office staff are signing in all visitor (not just first-time visitors) they can use the visitor module to search for the visitor's last name and then use the Sign-in (Door with IN-Arrow) icon to sign the visitor on-the-day. To use this method, follow these steps -

1. From the Visitor Module use the dropdown date-range filter (defaults to This Week) to display visitors for This Year. This will display the entire list of all previous visitors during the school year.

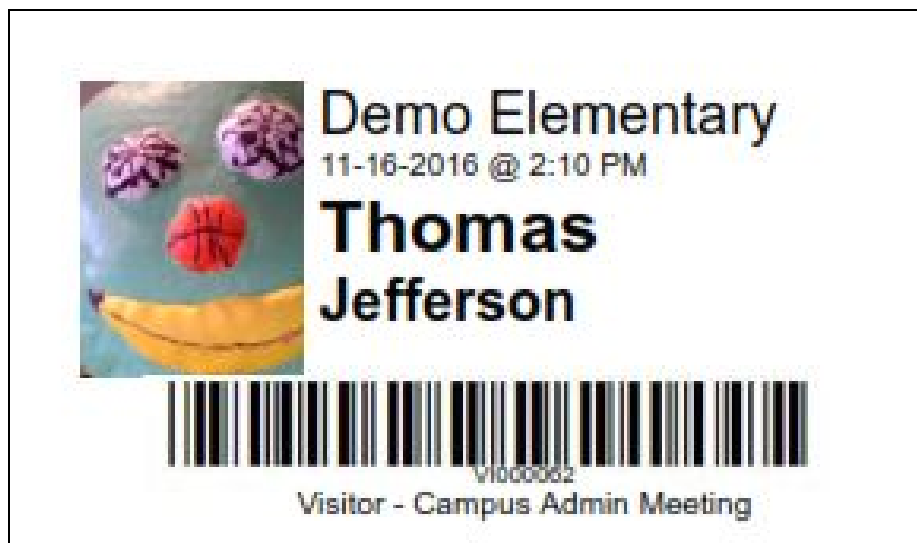
2. If you do not see the name of the visitor on your list, type their Last Name in the Last Name column of the table. This will search for all visitors with that last name.
3. On the visitor's record click the Sign-in (Door with IN-Arrow) icon. This will pull up their record.
4. If you don't have a photo on file and want to capture one, click the **UPDATE** button and then ask the visitor to stand in-front of your webcam.
5. If you don't want a photo, or after completing the photo capture, choose the purpose of the visit and click **NEXT**

This will print the name tag for the visitor with the date/time they signed in, along with the purpose of their visit and a barcode, which can be used to scan out the visitor when they depart.

Screening Visitors

If your district is using Real Time Screening of visitors the process is generally one that operates behind the scenes, as the system uses the visitor name and date-of-birth to submit the visitor to our screening partner and within a few seconds get a result back. Here are the different scenarios of what happens when the results come back from the SOR check.

CLEAR: If no record was found during the SOR check they will come-back CLEAR and the system will proceed with This will cause the system to proceed with printing the visitor's name tag similar to the following. The name time will include the date and time the visitor signed-in, along with the purpose of their visit.



NOT CLEAR: If a record is found during the SOR check they will come back NOT CLEAR. This will cause the following -

1. The system will display a pop-up window with the following warning

2. The kiosk system will initiate an email alert (and text alert if configured) to the Campus Kiosk Visitor Contact(s) with the visitor's name and time of attempted signin and a message about being 'found-on-list'. The email message also contains a photo of the person whose record was found during the SOR check.

The email alert subject will include '**Visitor Alert - NOT CLEAR Visitor At Adams Elementary**', where Adams Elementary will be substituted for the school name where the visitor tried to sign-in.

The email alert content will include:

On 11/16/2016, Visitor Jack Ripper at Adams Elementary could not be signed in. Reason - Screening check returned NOT CLEAR

Image On Hit Case Record.

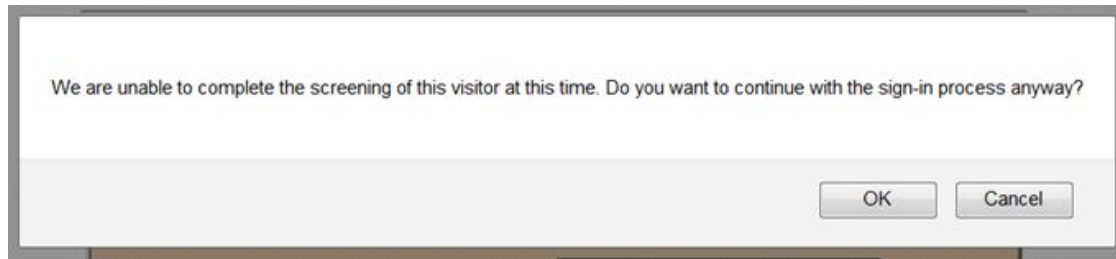
<IMAGE OF OFFENDER>

3. The text alert (if configured) will contain the same information as the email.
4. The visitor console (if the visitor was signed in via the console) will display the visitor's record at the top of the list with an SOR Status of NOT CLEAR. If the visitor signed in via the kiosk the front office staff will need to REFRESH the browser tab (press <F5>) to redisplay the visitor list.

Visitors List									
Add Visitor		Visitor Alert		Adams Elementary					
This Week									
Choose an Action...		Go							
Select All		Total Visitors: 3		Visitors Selected: 0				Export To Excel	
In / Out	Last Name	First Name	Sign In	Sign-Out	School	Purpose	DOB	SOR Status	
<input type="checkbox"/>			11/16/2016 3:34 PM	11/16/2016 3:34 PM	Adams Elementary	Campus Admin Meeting	06/03/1941	Not Clear	
<input type="checkbox"/>			11/16/2016 2:12 PM		Adams Elementary		08/09/1940	Clear	
<input type="checkbox"/>			11/16/2016 1:00 PM		Adams Elementary	Parent / Teacher Conf	12/12/1975	Clear	
Page 1 of 1 (3 items) [1]									
Page size: 100									

NO CHECK if temporarily unable to connect to the screening database.

This will also cause an email alert to be sent to the Campus Visitor Contact, but the visitor or front office staff will have the option to proceed with printing a name tag.



The email notice subject line will include **"Visitor Notice - Unable to Sign-in Visitor at Adams Elementary"**, where Adams Elementary will be substituted for the school name where the visitor tried to sign-in.

The email content will include:

On 11/16/2016, Visitor Jane Doe could not be signed in.

Reason - Unable to connect to background check service

NO CHECK if additional information is required to complete the screening process.

This occurs with the visitor's name and DOB have been placed on a knock-out list by our screening partner. there is more than one matching record or there has been a prior dispute on the record. This will also generate an email alert to the system administrator, but will offer the option to print a name tag for the visitor.



The email notice subject line will include **"Visitor Notice - Unable to Sign-in Visitor at Adams Elementary"**, where Adams Elementary will be substituted for the school name where the visitor tried to sign-in.

The email content will include:

Visitor 'John Smith' signed in but was not screened because additional details are required to complete that process. Please obtain the Social Security Number from this visitor and use the RESUBMIT W SSN action to complete the screening process.

If additional information is required, you will see the visitor on your visitor list with NO CHECK in the SOR column. If you hover over the NO CHECK it will display a tooltip with 'SSN Required'. You will need to ask the visitor for their SSN and then follow these steps -

1. From the Visitors module, find the record for the visitor and check the box next to their name.
2. Use the Action Drop down above and choose "Resubmit w SSN"
3. This will allow you to change the status from No Check to Clear or Not Clear

Changing Visitor Status

Sometimes it may be necessary to manually change the status of a visitor on the Visitor Module. This might occur if they could not be screened and after manually screening them you need to update their status.

If a Visitor's SOR Status needs to be changed, follow these steps:

1. Sign in to your account in the EZVolunteer system
2. Go to the Visitor module
3. Select the record(s) that need their SOR Status changed
4. From the Action menu choose Change Status and then choose the new status for the visitor. This will refresh the page with the visitor's new status in the SOR Status column.

Add Visitor

This Month
Bacon

Choose an Action...
Go

Select All

Total Visitors: 4

Visitors Selected: 0

<input type="checkbox"/>	Sign In	Last Name	First Name	Last Sign In	Last Sign-Out	Last School	Last Purpose	DOB	SOR Status
<input type="checkbox"/>									
<input type="checkbox"/>		Kuch	Brad	08/26/2016	08/26/2016	Bacon	Meet With Teacher	11/01/1974	No Check
<input type="checkbox"/>		Kuch	Grace	08/26/2016	08/26/2016	Bacon	Meet With Teacher	10/02/2003	No Check
<input type="checkbox"/>		Riggs	Charles	08/26/2016		Bacon	Meet With Teacher	06/03/1941	Not Clear
<input type="checkbox"/>		Kuch	Jill	08/26/2016		Bacon	Meet With Teacher	12/15/1976	Clear

Page 1 of 1 (4 items)
[1]

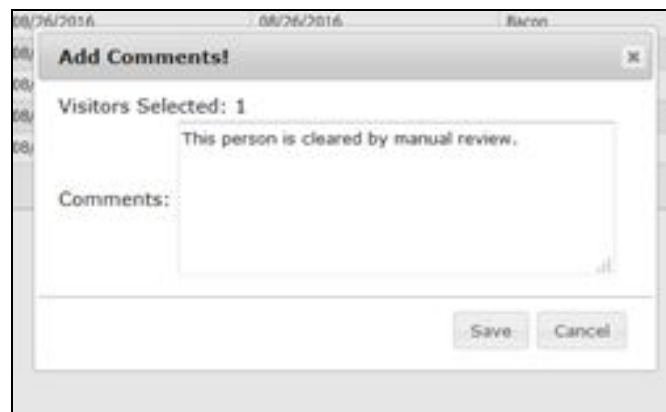
Page size: 100

Adding Comments on Visitor Records


Occasionally, you may want to add a comment to a Visitor profile. This can be useful to track other considerations or concerns regarding a visitor. Comments are not visible by the visitor, but they are visible to any other volunteer administrator at any other school who views that visitor record.

The system stores a log of comments including when their status is changed and who added the comment. To add a comment to a visitor's record -

1. From the Visitors module, find the profile in the Visitors List page, select the check box for record of the visitor from whom you need to add a comment.
2. Click the Action menu and choose "Add Comment"
3. This will display a pop-up window into which you can type your comment



Comments are stored on the User Profile as well as the display in the Visitor Profile.

	Name: Giles Denby DOB: 12/12/1975 ICE: 720-989-8195 Date: 11/16/2016 Location: Adams Elementary Purpose: <input type="text" value="Parent / Teacher Conf"/>
Comments: Expand/Collapse ▼ Demo Support added a comment - 11/16/2016 Getting divorced and has issues with authority figures.	
<div><input type="button" value="Cancel"/> <input type="button" value="Update"/> <input type="button" value="Next"/></div>	

Running a Visitor Report

To track the dates when a visitor signed in to your school or any school in the district you can simply select their records on your Visitor List using the check box beside their name and then from the drop down action menu choose Campus Visits (for a log of visits to your schools) or District Visits (for a log of visits to all schools in the district).

To track the details of who signed in to your school on any given day and the purpose of their visit you will need to run a EZVolunteer Kiosk Activity Report. This can be found on the page header under **Reports > EZVolunteer > Kiosk**. Then follow these steps -

1. Start by choosing Visitor if you only want to report on visitor sign-in activity. You can also report of Volunteers or Both.
2. Choose the date range for which you want your report. This defaults to Today, but you modify to include any dates you need.
3. Next, choose the Purpose of Visit you wish to report so you can filter to just specific visitor purposes, such as Early Departure or Late Arrival by students.
4. Finally, choose the **Export Excel** option to download a spreadsheet with the visitor records you want to view.

EZVolunteer Reports

Choose a Report: Kiosk

Report Layout: Kiosk Activity

☐ Volunteer ☐ Visitor ☒ Both

Sign In Date: From: 8/28/2016 To: 8/28/2016

Schools:
(Press and hold CTRL to select multiple items or deselect items)
All
*Career Center
*Partnership Center
*Volunteer Center

Opportunity Type (volunteers): All

Purpose of Visit (visitors): All

View HTML

Generate PDF/Print

Export Excel/CSV