



## Product Documentation

# Imprivata PatientSecure Client User Guide for Palm Scanning

Imprivata PatientSecure® 6.13

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# Overview

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This document describes how to positively identify patients and link them to their medical records using the Imprivata PatientSecure® client. The PatientSecure client may be integrated with your EMR's workflow, or it may be handled by an Imprivata PatientSecure Toolbar integration.

Imprivata PatientSecure uses biometric palm-vein recognition to create an encrypted and protected digital file that is matched to the patient's demographic information and linked to your patient's unique electronic medical record (EMR) in your hospital information system (HIS).

## Terminology

The following terms are used in this topic:

- **Gen 2 palm scanner** - the Keyo hand guide with the Fujitsu F-Pro/F-Pro+ Palm Vein Sensors, which supports touchless authentication for patients. Also referred to as the Fujitsu F-Pro/F-Pro+ sensors or the M5 sensors.
- **Gen 1 palm scanner** - the Fujitsu hand guide with the M3 palm vein sensor. The older generation of palm scanner hand guides that requires patients to place their hand on the scanner for all enrollment and authentication workflows. Also referred to as "Fujitsu V2 sensors".

## Accessing Imprivata PatientSecure

Depending on your implementation, PatientSecure starts authentication automatically from one of the following locations:

- from your EMR workflow.
- when you click **Authenticate** or **Enroll** on the PatientSecure toolbar.



**NOTE:**

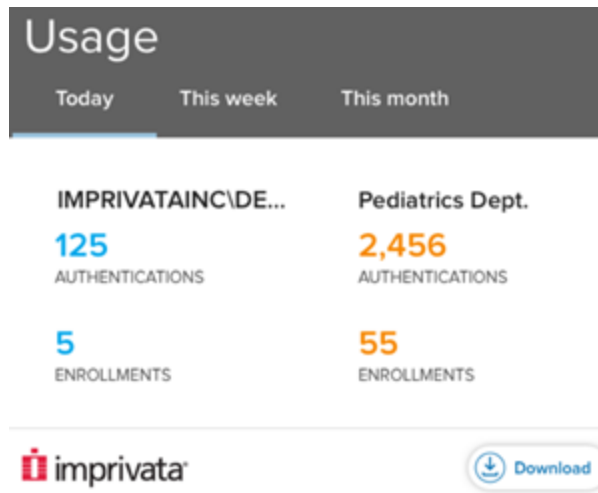
PatientSecure does not start enrollment automatically. If the **Enroll** button is not available on the toolbar, or if the toolbar is hidden, you cannot enroll patients at this workstation.

## Registrar Usage Notifications

The Usage dialog allows registrars to track their individual usage for enrollments and authentications.



**NOTE:** The ability to view the Usage dialog and usage notifications is set by your PatientSecure system administrator.



View your usage from the following locations:

- From the taskbar notification area. The Usage dialog displays daily usage statistics (successful authentications and enrollments) for the user and department.



**NOTE:** If the machine is not mapped to a facility or department, the Usage dialog is not available.

- A notification bubble is briefly displayed after each successful enrollment or authentication.

To display the Usage dialog:

1. Right-click the Imprivata PatientSecure icon in the taskbar notification area and select **Usage**.  
The Usage dialog displays the authentication and enrollments for today for the current user and department.
2. (Optional) To download a copy of today's usage statistics for a user or machine and for the entire department that the client machine is tied to:
  - a. Click **Download**.
  - b. Select the file format: **.TXT**, **.XLSX** or **.CSV**.
  - c. Specify the location to save the file. The default location is the Documents directory for the current user.

The download includes today's usage statistics in the time zone of the machine.

3. Click **This Week** or **This Month** to view statistics for a different time period.

The statistics for the new time period are displayed.

**NOTE:**

You may see more usage for **This Week** than when you select **This Month**. This can occur when a new month occurs in the middle of the week.

- Daily calculations are made from midnight on the current day.
- Weekly calculations are made from midnight Sunday of the current week.
- Monthly calculations are made from midnight on the first day of the current month.

## Interface Navigation

Use the **Tab** and **Enter** keys to move through most workflows.

## Keyboard Shortcuts

You can also use some keyboard shortcuts to navigate easily to specific workflows:

PatientSecure Workflow	Keyboard shortcut
Emergency search	ALT + E
Identify	ALT + I
Search by name	ALT + N
Search by date of birth	ALT + B
Script	ALT + S
Decline	ALT + D
Search for Patients in EMR - Results	Arrow Up / Down Page Up / Down

## PatientSecure Client Task Manager Processes

There are several PatientSecure Client (ImprivataPatientSecureClient.exe) processes in Task Manager, enumerated below:

- An Electron shell process
- An Electron utility process that provides network services.
- An Electron utility process that provides GPU capabilities.
- A renderer process for the main PatientSecure Client window.
- An Electron utility process that provides audio capabilities that will start after a palm is successfully scanned (when the Client setting for Audio Feedback is enabled).

The above tasks will remain running until the PatientSecure Client is shut down.

An additional renderer process will appear when additional PatientSecure Client windows are opened, such as the About, Usage Dialog, and Usage Notifications windows. When a window is closed, the corresponding task will drop from the list.

# Guidelines for Palm Capture

## Enrollment Guidelines

During the enrollment of a patient's palm scan, it is important to instruct the patient on proper hand placement on the scanner.

- Instruct the patient to spread their fingers and center their palm on the scanner. Touch the guides between their fingers. Do not rotate the hand.
- Instruct the patient to completely remove their hand from the scanner between the scans.
- Do not touch or hold the patient's hand during their scans.

## Scan Quality Scores

Scan quality scores assist you in capturing the highest quality palm scans for enrollment, identification, and verification.

The PatientSecure client displays a scan quality score on the **Enroll** page.

When enrolling patients, capture the highest quality palm scan possible. The higher the enrollment quality, the better PatientSecure is able to identify and verify patients on their next visits.

Scan Quality Scores

Icon color / label	Scan quality score	Description	Registrar Action
Green	High	Excellent quality for enrollment	None
Yellow	Medium	Adequate quality for enrollment, but you may want to make changes and recapture the scans.	Make changes and rescan the patient's palm: <ul style="list-style-type: none"><li>• Clean the scanner.</li><li>• Ensure the patient's palm is centered over the scanner.</li><li>• Completely remove the patient's hand from the scanner between scans.</li><li>• Do not touch or hold the patient's hand during the scan.</li></ul>
Red	Low	When the scan quality is low, the patient cannot be enrolled. PatientSecure displays a <b>Restart scan</b> button that restarts the scanning.	Make changes and rescan the patient's palm, using the <b>Restart scan</b> button: <ul style="list-style-type: none"><li>• Clean the scanner.</li><li>• Ensure the patient's palm is centered over the scanner.</li><li>• Completely remove the patient's hand from the scanner between scans.</li><li>• Do not touch or hold the patient's hand during the scan.</li></ul>

# Enroll or Re-enroll a Patient

When your patient is not identified in the system because an authentication results in **No Match Found**, the next step is to enroll the patient.

From the patient summary screen:

1. Ask the patient for a photo ID as proof of identity.

If the patient does not present a photo ID as a proof of identity, you may be able to mark the record as such, depending on your PatientSecure environment. For more information, see [Enroll a Patient Without a Valid ID](#)

2. Do one of the following, depending on your implementation:

- **In EMR workflows:** open the patient check-in screen and click **Enroll**.
- **In the Toolbar workflow:** click **Enroll** in the toolbar.



**NOTE:**

In the following cases, you cannot enroll patients:

- If the **Enroll** button is grayed and unavailable, your Imprivata PatientSecure license may be missing or not valid. You may authenticate and re-enroll patients, but you may not enroll new patients.
- If the **Enroll** button or the toolbar is hidden, you cannot enroll patients at this workstation.

3. Follow the screen instructions to verify the patient's demographic data.
4. Click **Continue**.
5. Follow the screen instructions to position the patient's right hand palm and to scan and rescan it.



**BEST PRACTICE:**

Enroll and authenticate the patient's right hand, unless their right hand is permanently unavailable. In that case, enroll the patient's left hand.

The screen will display a message indicating that you are scanning the patient's left hand.



**NOTE:**

In some cases, when the patient declines a palm scan, you can still enroll the patient with a photo only. This ability is dependent on your PatientSecure implementation. See [Enroll a Patient with a Photo Only](#).

6. Imprivata PatientSecure returns one of the following results:



Results	Description	User Action
The patient is already enrolled in PatientSecure.	The patient's demographic information and biometric information are linked in Imprivata PatientSecure.	To access the patient's record, click <b>Verify patient</b> .
Would you like to re-enroll the patient?	The patient's record already has a palm scan associated with it. This may indicate that the patient's record contains a poor-quality original scan that cannot be matched.	If you are confident that the patient is already enrolled in Imprivata PatientSecure and the patient used proper hand placement to take the current palm scan, click <b>Yes</b> to overwrite the existing palm scan and replace it with the new, higher-quality palm scan.
There was a problem matching the scans. Retry scan <n>.	There was a problem matching one of the two enrollment scans.	Reposition the patient's palm (spread fingers and center the palm on the scanner) and retry the scan.

## Enroll a Patient Without a Valid ID



### NOTE:

The availability of this workflow depends on your PatientSecure environment.


In certain circumstances, you may want to enroll the patient without being presented with a valid photo ID.


From the patient summary screen:

- Do one of the following, depending on your implementation:
  - In EMR workflows:** open the patient check-in screen and click **Enroll**.
  - In the Toolbar workflow:** click **Enroll** in the toolbar.
- Follow the instructions on the screen to verify the patient's demographic data.
- Click **No** in the **Valid ID presented** field to indicate that the patient did not present a valid ID.

The patient record is flagged and can be updated on subsequent visits when a valid ID is presented.


Enroll







**Aquilina, Tiffany** "Trish"  
DOB: 01/01/1955  
MRN: 12345

Open record

 Valid ID presented ☐ Yes ☒ No





# Photo-Only Enrollment and Verification

PatientSecure supports photo-only interactions, in which patient identification is not biometric. The registrar performs the following tasks:

- enrolls the patient with a photo, instead of a palm scan.
- compares the patient who arrives at the registration desk or kiosk with a photo stored with the patient record.

Photo-only interactions do not provide the same level of security as a biometric identification, but they are useful in pediatric practices, where the patient is too young for a biometric identifier, and to identify any patients who are unable or unwilling to participate in a biometric scan.

In some installations, the EMR requires a photo as a second identifier.

## Photo Guidelines

When taking a patient's photo, follow these guidelines:

- The patient is facing the camera with no shadows on his or her face.
- The patient is not wearing a hat or head covering that obscured the hair or hairline, unless worn for daily religious practice.
- The patient is not wearing dark glasses. If the patient is wearing prescription glasses, avoid glare on the lenses.



### NOTE:

Imprivata does not recommend a specific brand of camera for photo captures. Work with your preferred vendor to determine the camera that best suits your needs.

## Enroll a Patient with a Photo Only

To enroll a patient with a photo only:

1. The patient provides his or her date of birth (DOB) but declines to use the palm scanner.  
This may be because the patient is unable to use the scanner or is uncomfortable with it.
2. Ask the patient for his or her full name and gender.
3. In the PatientSecure client, click **Decline**.
4. Click **Enroll photo**.
5. Follow the screen instructions to verify the patient's demographic information.

Imprivata PatientSecure determines whether a photo is already attached to the patient record:

- If a photo is available, PatientSecure returns a **Patient photo found** message. Click **OK** to continue to the Photo Capture window, where you can update the patient's photo.
- If a photo is not available, the Photo Capture window opens automatically.

**NOTE:**

If the patient is already enrolled, you can re-enroll using photo capture, bypassing any biometric (palmscan) that may be attached to the patient record.

6. Adjust the camera by dragging the cursor over the image until you are satisfied with the capture.

Click **Take Photo**.

7. To take a different photo, click **Retry**.

8. Click **Save photo**.

The photo is added to the patient's record.

## Verify a Patient Using a Photo Only

When a patient arrives for an appointment, you can match him or her to a specific medical record.

To verify a patient using only a photo:



1. Open the patient check-in screen, and then click in the toolbar.

Some facilities are set up to start **Authentication** automatically.

The patient identifier and available patient demographic information are automatically entered into the palm scan screen, but the patient declines to use the palm scanner. This may be because the patient is unable to use the scanner or is uncomfortable with it.

2. Click **Enroll Photo Only**.

Imprivata PatientSecure checks whether a photo is already attached to the patient record:

- If a photo is available, PatientSecure returns a **Patient photo found** message.

Compare the photo with the patient at your workstation. If it is out-of-date, you can update it.

Click **Replace Photo** to continue to the Photo Capture window.

**NOTE:**

If the photo is acceptable, click **Close**.

- If a photo is not available, the Photo Capture window opens automatically.

3. From the Photo Capture window, adjust the camera so that the patient's face is in the capture area.

4. Adjust the camera by dragging the cursor over the image until you are satisfied with the capture.

5. Click **Take Photo**.

## Add or Update a Patient Photo

In some facilities, the patient biometric record contains a photo of the patient.

To add or update the patient's photo:

1. From the patient demographic screen or the authentication Match Found screen, click **Add Photo**.  
If the patient record already contains a photo that you wish to update, click **Update photo**.  
The Photo Capture window opens.
2. The interface displays a tracking box to assist you in positioning the patient's face. Drag the tracking box so that the patient's face is in the capture area.
3. Adjust the camera by dragging the cursor over the image until you are satisfied with the capture.  
Click **Take Photo**. The photo is captured.
4. To take a different photo, click **Re-take Photo**.  
Click **Confirm Photo**.
5. When you are satisfied with the photo, click **Save**.  
The photo is captured and added to the patient's biometric record.

## Convert a Photo Only Enrollment to a Full Biometric Enrollment

During a previous visit, the patient may have opted out of using PatientSecure for a biometric enrollment and may have enrolled with only a photo. The patient may decide to opt back in to PatientSecure.

To convert a photo only enrollment to a full biometric enrollment:


1. Follow the procedure in [Enroll a Patient with a Photo Only](#) to enroll with a photo.
2. Click **Enroll Palm**.
3. Follow the screen instructions to position the patient's palm and to scan and rescan it.

# Authenticate a Patient

When a patient arrives for registration, you can look up his or her medical record (Authenticate) or match him or her to a specific medical record (Verify). For more information, see [Verify at Patient Check-in](#).

Some facilities are set up to start Authentication automatically.

To authenticate using Patient Search:

1. Do one of the following, depending on your implementation:
  - **In EMR workflows:** Open the patient search screen, where you look up the patient's record.
  - **In the Toolbar workflow:** Click **Authenticate** () in the PatientSecure toolbar.
2. On the Identify page, do one of the following:
  - **Search by date of birth.** Enter the patient's date of birth.
  - **Search by name.** Enter the patient's last name and first initial into the boxes.



**NOTE:**

Some facilities are set up to search by patient's DOB. The additional ability to search by patient name is set by your PatientSecure system administrator.

3. Follow the screen instructions to position the patient's palm and to scan it.



**NOTE:**

The screen displays a message indicating which palm (right or left hand) was originally enrolled. Ensure that the patient's palm scan (right or left hand) matches the hand originally enrolled in PatientSecure.

Depending on whether you have a Gen 1 or Gen 2 scanner, the screen instructions and animations may be slightly different.

## Gen 2

Identify

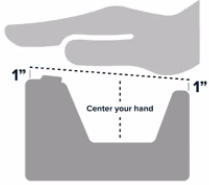
Decline

Date of birth


MM / DD / YYYY


Search by name

Center right hand above the scanner until you hear a beep. No need to touch it!



Center your hand

 imprivata

 Emergency search

## Gen 1

Identify

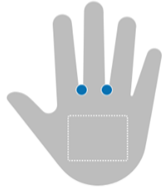
Script

Decline

Enter the date of birth

MM / DD / YYYY

Place right hand on scanner. Slide forward to touch guides



 imprivata

 Emergency search

#### 4. Imprivata PatientSecure returns a result:

Message	Description	User Action
<b>Success</b>	Imprivata PatientSecure matched the palm scan with the patient's demographic record in the HIS.	Verify the patient's name and date of birth on the screen, and then click <b>Open record</b> . If the patient photo feature is enabled, you can optionally add or update the patient's photo. For more information, see <a href="#">Add or Update a Patient Photo</a> .
<b>Palm not found.</b> Confirm patient information and retry scanning.	PatientSecure did not find a palm scan.	<ol style="list-style-type: none"> <li>1. Verify the patient's date of birth and instruct the patient about proper hand placement.</li> <li>2. Click <b>Try again</b>.</li> </ol>
<b>Patient found with different date of birth.</b>	PatientSecure found the patient's biometric record but cannot match the date of birth you supplied.	Select the correct date of birth.
<b>Check the patient's information.</b>	Imprivata PatientSecure found the patient's biometric record but cannot match the demographic information you supplied with the patient's demographic record in the HIS.	<p>To improve your chances of success:</p> <ol style="list-style-type: none"> <li>1. Verify the patient's date of birth and instruct the patient about proper hand placement.</li> <li>2. Click <b>Edit</b> to enter the corrected date of birth. <ul style="list-style-type: none"> <li>• Click <b>Yes</b> to search again.</li> <li>• Click <b>No</b> to open the patient summary screen, where you can enroll the patient. For more information, see <a href="#">Enroll or Re-enroll a Patient</a>.</li> </ul> </li> <li>3. If patient information is still incorrect, click <b>Flag for Review</b>.</li> </ol>
<b>Enrollment found at another location.</b> Go to EMR to enroll patient at this location.		Click <b>Close PatientSecure</b> .
<b>Match found - palm update needed.</b> Palm enrollment to begin shortly.	The patient is under the child age limit, and their last enrollment was more than one year ago. The patient's scan needs to be kept up to date with their growth.	Instruct the patient about proper hand placement and rescan.
<b>Patient too young.</b> Must be 5 or older to use PatientSecure.	The patient is under the child age limit to use PatientSecure.	Click <b>Cancel</b> .
<b>Palm Not Found</b> Use this search to access your EMR to find the right patient. Then enroll them in PatientSecure.	The patient was not found in PatientSecure. You can perform a search in your EMR using the patient's identifying information. See <a href="#">Search and Create Patient in EMR</a> .	Use the search criteria fields and click <b>Search</b> .
Patient was not identified by touchless scan. Ask patient to touch the scanner to continue.	This message applies to identifications using the Gen 2 scanners only. The patient needs to touch the scanner to continue the identification.	Instruct the patient about proper hand placement and rescan.
We found your record, but need to update your palm scan.	<p>This message only applies in the following scenario:</p> <ul style="list-style-type: none"> <li>• In facilities where your IT department is in the progress of migrating from the Gen 1 scanners to the Gen 2 scanners <i>and</i></li> <li>• The patient has successfully authenticated using their existing Gen 1 palm scan but also needs to update their palm scan using the Gen 2 scanner.</li> </ul>	<ul style="list-style-type: none"> <li>• If the patient wishes to update their palm, instruct the patient about proper hand placement and rescan.</li> <li>• If the patient does not wish to update their palm scan at this time, click <b>Skip update</b> and then <b>Yes, Skip</b>. This results in the following message: <ul style="list-style-type: none"> <li>○ <b>Palm scan not updated.</b> Patient will be prompted to update enrollment again during their next scan.</li> </ul> </li> </ul>



# Verify at Patient Check-in

When a patient arrives for an appointment, you can match him or her to a specific medical record. Some facilities are set up to start Authentication automatically.

To verify at patient check-in:

1. Do one of the following, depending on your implementation:
  - **In the EMR workflow:** open the patient check-in screen and click **Verify**.
  - **In the PatientSecure Toolbar workflow:** click **Authenticate** in the toolbar.

The patient identifier and available patient demographic information are automatically entered into the palm scan screen.

2. Follow the screen instructions to position the patient's palm and to scan it.



**NOTE:**

The screen displays a message indicating which palm (right or left hand) was originally enrolled. Ensure that the patient's palm scan (right or left hand) matches the hand originally enrolled in PatientSecure.

3. Imprivata PatientSecure returns one of the following results:

Message	Description	User Action
Patient Found	Imprivata PatientSecure matched the palm scan with the patient's demographic record in the HIS.	<ul style="list-style-type: none"><li>• Verify the patient's name and date of birth on the screen, and then click <b>Open record</b>. If the patient photo feature is enabled, you can optionally add or update the patient's photo. For more information, see <a href="#">Adding or Updating Patient Photos</a>.</li></ul>
Ensure patient matches photo. If appropriate, encourage patient to enroll palm for the full benefit of PatientSecure	For a photo only verification, ensure that the patient matches the photo.	<ol style="list-style-type: none"><li>1. Verify the patient's name and date of birth on the screen.<ol style="list-style-type: none"><li>a. (Optional) Encourage patient to enroll their palm. Click <b>Enroll Palm</b>.</li><li>b. Click <b>Open record</b>.</li><li>c. Update the patient's photo. For more information, see <a href="#">Adding or Updating Patient Photos</a>.</li></ol></li></ol>
<b>Palm not found.</b> Close PatientSecure and enroll patient.	Imprivata PatientSecure matched the medical record number, but the scanned palm does not match the one on file with this record.	<ul style="list-style-type: none"><li>• Click <b>Retry scan</b> to rescan the palm.</li><li>• Click <b>Close</b>.</li></ul>
Palm scan does not match our records. Retry scanning or re-enroll patient for successful verification.	Imprivata PatientSecure matched the medical record number, but the scanned palm does not match the one on file with this record.	<ul style="list-style-type: none"><li>• Click <b>Try again</b> to rescan the palm.</li><li>• Click <b>Re-enroll Patient</b> to re-enroll the patient.</li></ul>
Patient is not enrolled in PatientSecure.	The patient is not enrolled in PatientSecure. Enroll the patient before verifying.	<ul style="list-style-type: none"><li>• Click <b>Enroll Patient</b>.</li></ul>
Match found - palm update needed. Palm enrollment to begin shortly.	The patient is under the child age limit, and their last enrollment was more than one year ago. The patient's scan needs to be kept up to date with their growth.	Instruct the patient about proper hand placement and rescan.
Patient could not be verified		<ul style="list-style-type: none"><li>• Click <b>Try again</b> or <b>Close</b>.</li></ul>

# Verify a Patient for Multiple Appointments

Your location or facility may allow you to verify a patient for multiple appointments during their visit. For example, when a patient checks in for multiple appointments in a day - a doctor's appointment, a lab visit, and an x-ray appointment, you can scan the patient once, and then bypass the scans on subsequent verifications.



## NOTE:

The availability of this workflow depends on your PatientSecure environment.

When a patient arrives for an appointment, you can match him or her to a specific medical record. Some facilities are set up to start Authentication automatically.


To verify at patient check-in:

1. Do one of the following, depending on your implementation:
  - **In the EMR workflow:** open the patient check-in screen and click **Verify**.
  - **In the PatientSecure Toolbar workflow:** click **Authenticate** in the toolbar.


The patient identifier and available patient demographic information are automatically entered into the palm scan screen.

2. Follow the screen instructions to position the patient's palm and to scan it.
3. To verify the patient for the next appointments, click **Verify**.

Verify

 Palm scan was previously verified


Verify patient for next appointment



**Aquilina, Tiffany "Trish"**  
DOB: 01/01/1955  
MRN: 12345

Close

Verify



# Search and Create Patient in EMR



**NOTE:**

The ability to access this workflow is set by your PatientSecure system administrator.

If the authentication fails, use this workflow to search for the patient in the EMR and enroll them in PatientSecure.

1. At the **Patient not found in PatientSecure** page, check and confirm the patient's ID.

Enter the following search parameters. You can also use the **Tab** key to advance through the search fields.

- a. **Date of birth.** Required. Type the patient's date of birth. The date format is **mm/dd/yyyy**.
- b. **First name.** Type the patient's first name.
- c. **Preferred name.** Type the patient's preferred first name.
- d. **Last name.** Required. Type the patient's last name.
- e. **Preferred last name.** Type the patient's preferred last name.
- f. **Phone #.** Type the patient's telephone number, including area code. The format is **xxx-xxx-xxxx**.
- g. **Sex.** Select the patient's gender from the drop-down list. Values are: **Male**, **Female**, **Other**, and **Unknown**.
- h. **Email.** Type the patient's email address. The format is **somename@example.com**.
- i. **Zip Code.** Type the patient's five digit zip code. The format is **nnnnn**.
- j. **SSN.** Type the patient's social security number. At a minimum, type the last four digits of the patient's social security number.
- k. Select an identifier from the MRN drop-down list and enter the patient identifier in the box.

2. Click **Search**.

The bottom pane displays the matching patient records from the EMR, sorted by relevance.

If desired, refine the list of results by entering additional search parameters.

**!** Palm not found. Use this search to access your EMR to find the right patient. Then enroll them in PatientSecure.

Date of birth*	Last name*	First name	Phone number	Sex
03/16/1947	Smart	Wilma	XXX - XXX - XXXX	Select
Email	Zip code	SSN	MRN	change
name@domain.com	XXXXX	XXXX - XX - XXXXX	Choose an identifier	Search

5 patients found

Wilma Smart					Sex: Male
DOB: 03/16/1947	MRN: 10003054	Home Number: -	Home Address: 801 S. Washington St, DuPage, IL, United States of Americ...	Personal email: a@a.com	
SSN: -	Mobile Number: 720-467-5486	Work Address: -	Work email: -		

Wilma Smart					Sex: Male
DOB: 03/16/1947	MRN: 10003055	Home Number: -	Home Address: 801 S. Washington St, DuPage, IL, United States of Americ...	Personal email: a@a.com	
SSN: -	Mobile Number: 720-467-5486	Work Address: -	Work email: -		

Wilma Smart					Sex: Male
DOB: 03/16/1947	MRN: 10003075	Home Number: -	Home Address: 801 S. Washington St, DuPage, IL, United States of Americ...	Personal email: a@a.com	
SSN: -	Mobile Number: 720-467-5486	Work Address: -	Work email: -		

Close Enroll



- If the search found the patient, select the appropriate patient from the results and click **Enroll**.  
If the search found the patient was enrolled at a different location, enter the patient information to enroll them at this location and click **Enroll**.  
For Cerner integrations, if the search found the patient, but the associated palm scan needs to be updated, click **Update Palm**.
- If the search did not find the patient, click **Create new patient in EMR**.
- Enter patient demographics and contact information on the Create patient page and click **Next**.
- Review the patient information and click **Create and Enroll in PatientSecure**.

The patient record is created in the EMR and enrolled in PatientSecure.

## Authenticate with Emergency Search

Emergency Search is a special PatientSecure function used only in emergency practice. In an emergency situation, authorized users can use Emergency Search.

When your patient is incoherent or otherwise unable to identify themselves, it is especially important to identify the patient quickly and locate any medical records available at your facility.

To authenticate using Emergency Search:

- In the Toolbar workflow, click **Authenticate** (🔍) in the toolbar.  
Some facilities are set up to display the **Authenticate** screen automatically.
- Check to see if the patient is carrying identification.

- If you find an ID with the patient's date of birth, you can save time by first attempting to authenticate the patient.
  - If you cannot find any identification, click **Emergency Search**.
3. Enter the patient's approximate age in the **Estimated patient age** box. PatientSecure searches records within a range of ten years above and below this age.
  4. Select a sex. If you cannot determine the patient's sex, select **Unsure**.
  5. Click **Identify**.
  6. Follow the screen instructions to position the patient's palm and to scan it.



**NOTE:**

The authentication process may take an extended time to process because Imprivata PatientSecure is conducting a broad search for the patient.

If the process is taking too long, click **Cancel Search**.

Imprivata PatientSecure returns the following results:

Message	Description	User Action
<b>Success</b>	Imprivata PatientSecure located a matching record in the system.	<ol style="list-style-type: none"> <li>1. Review the record against the patient's appearance.</li> <li>2. Click <b>Go to record</b>.</li> </ol>
<b>Palm not found.</b> Edit estimated age or gender, or retry scanning.	Imprivata PatientSecure could not locate a matching record in the system.	Click <b>Retry scan</b> or <b>Close</b> .

# The Registrar Script

The **Script** button in the client interface allows you to read a customized script to new patients about the benefits of enrolling in PatientSecure.

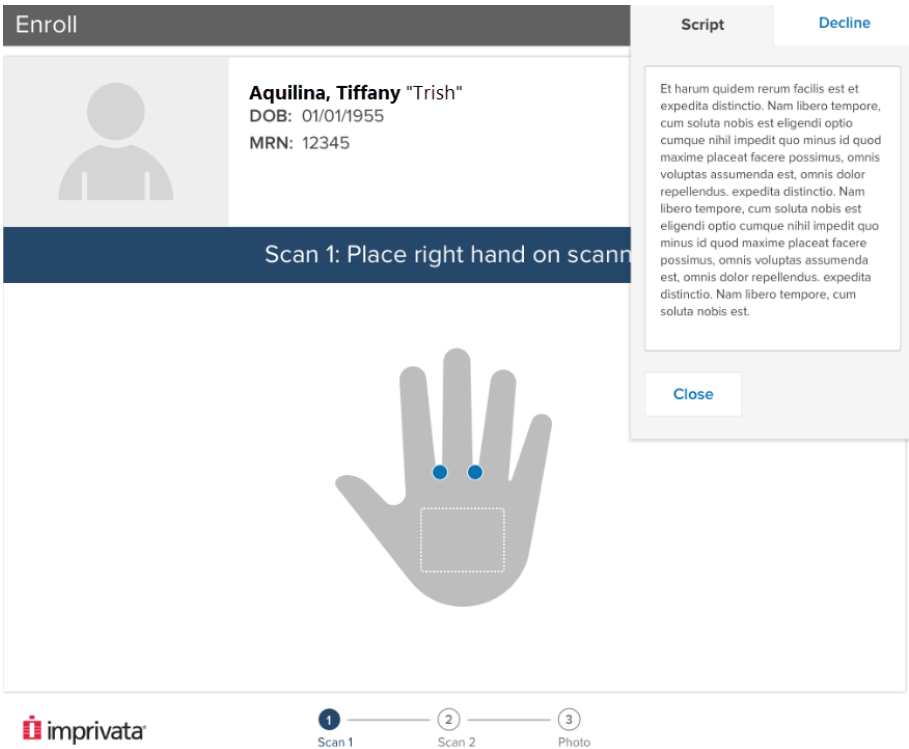


**NOTE:**  
The display of the registrar script is controlled by your system administrator.  
If the registrar script is not enabled in your PatientSecure environment, the Script pane will not show any content.

To display the registrar script:

1. From the PatientSecure window, click **Script**.

The dialog displays the text of the script for you to read to the patient.



# Patient Opts Out of Using PatientSecure

During enrollment or verification, the patient may decide to opt out of using PatientSecure for their palm scan.

The **Decline** button allows you to provide a reason for closing PatientSecure.



**NOTE:**

PatientSecure provides a default list of common opt-out reasons. The list of opt-out reasons displayed in your PatientSecure client may be different, depending on how your organization configured it.

- Enroll photo - enroll a patient using only a photo. See [Enroll a Patient with a Photo Only](#).
- Temporary disability
- Permanent disability
- Physical limitation
- Religious reason
- Personal reason
- Other (describe) - type a reason in the text box.

If the patient had opted out of scanning their palm in the past, the PatientSecure client displays a message containing the last opt-out reason and the date.

Enroll

Aquilina, Tiffany "Trish"

DOB: 01/01/1955

MRN ID: 12345

Close

Enroll



!

Patient opted out on 01/20/2025: **Physical limitation**. If appropriate, encourage patient to enroll in PatientSecure.

# Cleaning and Maintenance of the Scanning Device

It is important to follow standard infection control practices when cleaning the Keyo scanning device (the Gen 2 scanner).

There are two main areas on the device to clean:

	
The glass bottom and sensor	The Antimicrobial Copper Guide and the medical-grade plastic base
<p>To clean the glass bottom and sensor, simply use the microfiber cloth provided by the Imprivata team.</p> <ul style="list-style-type: none"><li>• Do not use any liquid when cleaning this area of the device.</li><li>• Do not remove the sensor.</li></ul>	<p>The Antimicrobial Copper Guide and plastic base must be cleaned regularly, just like any other hard surface. Standard hospital cleaners are compatible with antimicrobial copper materials and medical grade plastics.</p>

## Cleaning Products to Use

Hospital detergents	Hospital disinfectants
<p>Use to clean oils and grease from the surface.</p> <ul style="list-style-type: none"><li>• Always refer to manufacturers' guidelines.</li><li>• Use before disinfecting surfaces.</li><li>• Discard cleaning wipes after each use.</li></ul>	<p>Use any of the following to disinfect the surface.</p> <ul style="list-style-type: none"><li>• Alcohol</li><li>• Bleach</li><li>• Quaternary ammonium</li><li>• Ammonium chloride</li><li>• Phenol and ammonia</li></ul>



# Cleaning Products to Avoid

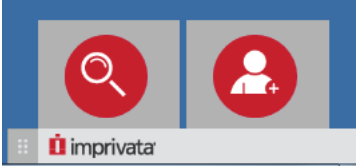
Disinfectants containing metal-ion chelators, such as EDTA. These cleaning agents have the potential to reduce the copper's efficiency.	Proprietary polishing products, such as Brasso. These will clean the copper but may leave a residue that can interfere with the antimicrobial effect.
Antimicrobial Copper alloy surfaces must not be waxed, painted, lacquered, varnished, or otherwise coated. The alloys tarnish to varying degrees, which does not impair their antimicrobial efficacy.	

# The PatientSecure Toolbar Interface



**NOTE:**  
If PatientSecure is integrated into your EMR workflow, skip this section.

In Toolbar workflows, the Imprivata PatientSecure toolbar is available on your desktop.



Element	Name	Description
	Authenticate	Authenticate a patient at your facility. This is always the first step for every patient interaction.
	Enroll	Enroll a new patient or re-enroll an existing patient.

## Using the Toolbar

- Drag the lower-left corner of the Imprivata PatientSecure toolbar to move it on your desktop or attach it to the side of your desktop.
- You can minimize the toolbar. Once minimized, you can access the toolbar again by clicking the PatientSecure icon in the task bar.
- The PatientSecure icon in the task bar displays the connection state of the client to the PatientSecure server.
  - A red icon indicates that the PatientSecure client can communicate with the server.
  - A grey icon with "offline" indicates that the PatientSecure client cannot communicate with the server.
  - Hover over the toolbar to view the fully qualified domain name (FQDN) of the PatientSecure Web Service server the client is connected to.
- Right-click the toolbar icon to perform the following tasks:
  - **Restart** the PatientSecure client services. To reload PatientSecure after a setting is changed, click **Restart**.
  - **View** the application information. To view information about the PatientSecure client, including machine mapping information, click **About**. The dialog displays:
    - Software release information
    - Machine mapping information: Organization, facility, department and machine name.
  - **Download logs**. To collect and compress the client log files for troubleshooting, click **Download logs**.

By default, it creates a zip file located in the C:\ProgramData\Imprivata\PatientSecure directory.

- **Quit** the application. To exit PatientSecure, click **Quit**.





**NOTE:**

The toolbar can be configured to display the **Authenticate** button or the **Enroll** button or both.

You can also configure the Toolbar to display neither button, in which case it is always hidden. For assistance, see your system administrator.

# Troubleshooting

Symptom/Error Message	Description	User Action
Symptoms		
I cannot find the Imprivata PatientSecure toolbar.	If the toolbar is not available, it may be hidden, in which case you may authenticate patients through an automatic startup, but you cannot enroll patients.	Check your desktop, especially the sides, where the toolbar may be docked.
The <b>Enroll</b> button does not work.	The PatientSecure license may have expired.	Ask your administrator to check your Imprivata PatientSecure license expiration date. If your license has expired, you may not enroll patients.
No EMR or No Search Screen.	Indicates that you are on an incorrect screen in the EMR to authenticate or enroll a patient.	Open a patient search or patient summary screen before you click <b>Authenticate</b>  or <b>Enroll</b>  .
After authenticating a patient, I see a "No Match Found" message, but when I authenticate again, sometimes a match is found.	<p>You will see a "No Match Found" message when:</p> <ul style="list-style-type: none"> <li>The patient is not enrolled in PatientSecure. After re-authenticating to double-check the database records, you will enroll the patient.</li> <li>The palm scanner cannot get a good image of the patient's palm.</li> <li>The original palm scan stored in Imprivata PatientSecure is of poor quality and cannot match the authentication scan.</li> </ul>	<ul style="list-style-type: none"> <li>When you authenticate again, instruct the patient about proper hand placement. This will result in a more accurate image, with a greater chance of matching an existing palm scan.</li> <li>After re-authenticating to double-check the database records, you will re-enroll the patient.</li> </ul>
After authenticating a patient, I see an "Palm Found" message, yet I still need to re-scan the patient's palm.	Sometimes the palm scan is located in the Imprivata PatientSecure database, but the demographic information does not match.	It is important to make sure the correct record is associated with the correct patient. Verify the patient's information and re-scan the patient's palm.
After authenticating a patient, I see a "Match Found" message, yet I still need to re-scan the patient's palm.	Children between the ages of 5 and 15 must update their palm scan every year to allow for growth.	When your patient is under 15 and has not submitted a new palm scan within the past 12 months, scan his or her palm before completing authentication.
Error Messages		
Authenticate Screen Unavailable	Indicates that you are on an incorrect screen in the EMR to authenticate a patient.	Ensure that you have the correct patient record displayed in the DAR or patient station.
Enroll Screen Unavailable	Indicates that you are on an incorrect screen in the EMR to enroll a patient.	Ensure that you have the correct patient record displayed in the DAR or patient station.
Palm device is disconnected: Connect the palm scanner to begin scanning	The system cannot detect your palm scanner.	Plug in the USB cord of the palm scanner to your computer's USB port.
An error occurred during processing.	Your network connection has encountered a problem.	Click <b>OK</b> , and then restart Imprivata PatientSecure on your local machine or server. Contact your IT department for assistance.
PatientSecure is unable to connect to the server	The PatientSecure client cannot connect to the server.	Contact your IT department for assistance.
PatientSecure is unable to run on this machine.	The machine is not mapped to a facility and department.	Contact your department administrator.
License is out of compliance	Your Imprivata PatientSecure license is not valid. You may not enroll new patients, but you may authentic and re-enroll existing patients.	Ask your administrator to check your Imprivata PatientSecure license expiration date.