



TrustVisitor

TrustVisitor® Feature Highlights

Release 4.1

CertiPath

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TrustVisitor Highlights

- ✓ Know everything about your visitors **BEFORE** they're in your lobby
- ✓ Harmonize every step of your visitor management process with **workflow customization**
- ✓ Tailor data collected at visitor registration, by location, via **user defined fields**
- ✓ Automatically create high assurance events through your **calendar tool**
- ✓ Accept and **validate** visitors' electronic credentials from pre-registration *through* the event start time
- ✓ Approve/Reject visitors via **email** or through an **Approvers module**
- ✓ Integrate with any **background check** service, with option to **re-run** background check on demand
- ✓ Automatically provision approved visitors into your PACS for the **duration of their event**
- ✓ Provision **temporary credentials** to non-smart card visitors, or to employees with forgotten badges
- ✓ Provide access quickly and easily to **VIPs, Unregistered, and Unscheduled visitors**
- ✓ Check-in for events via touchless **kiosk**
- ✓ Set user access permissions with secure **multi-tenant** enterprise functionality
- ✓ View badge status and visitor history **reports**
- ✓ Bind a **scanned ID** to a visitor record, or create a **new visitor record** from an ID scan

TrustVisitor Differentiators

Key: X not supported  partially supported ✓ FULLY SUPPORTED

Feature	Commercial Visitor Management	Typical High Assurance Visitor Management	 TrustVisitor
Fully HSPD-12/FICAM compliant	X		✓
Scheduled, unscheduled, and unregistered visitors	✓		✓
Clientless email and calendar integration	X	X	✓
Background check integration			✓
Preregister a personal electric credential remotely	X	X	✓
Assign a temporary electronic visitor credential	X		✓
Fully customizable event and visitor workflows, driven by User Defined Fields	X		✓
Secure multi-tenant enterprise functionality	X		✓
Provision tailored visitor access in facility access control system	X		✓
Interoperable with multiple PACS at one facility	X	X	✓
VIP visitors	✓	✓	✓
Touchless kiosk check-in			✓
Employee and visitor wellness pre-screening			✓
Assign a temporary credential for a forgotten employee badge	X	X	✓

TrustVisitor Integrations

Physical Access Control Systems (PACS)

tyco



HIRSCH
by **IDENTIV**



Validation Systems

tyco | Innometriks



User Roles and Experience



TrustVisitor User Roles



Event Sponsor

- Employees regularly use calendaring software to create events and meetings.
- TrustVisitor leverages this activity and processes information from the calendar invite to process visitors while retaining the relationship between an event sponsor and their invitees.



Visitor

- Persons wishing to access your facilities.
- It's important to establish the business reason for being present, the duration of their visit, who they are visiting, and where they will be going onsite. It's also critically important to validate their organizational affiliation.



Approver

- Security personnel responsible for approving visitors.
- High assurance locations require current, detailed, and clearly communicated information about all visitors.



Lobby Guard

- The last line of defense before visitors are walking among your employees in secure parts of your facility.
- Success is critically dependent upon real-time access to security-relevant data to aid risk-based decision making.



TrustVisitor *Event Sponsor Experience*

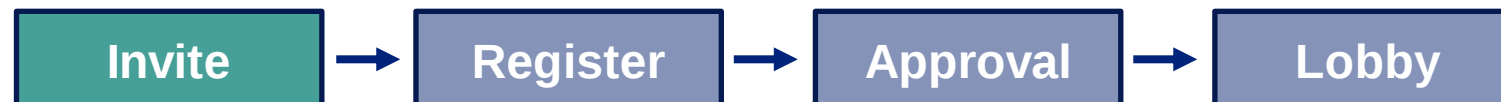


Action: Create a new event

Description:

- The **Event Sponsor** leverages existing processes to create a new event or meeting via calendar invite.
- By adding a TrustVisitor email address to the invite, the application automatically notifies visitors and encourages them to complete a simple, remote registration process.

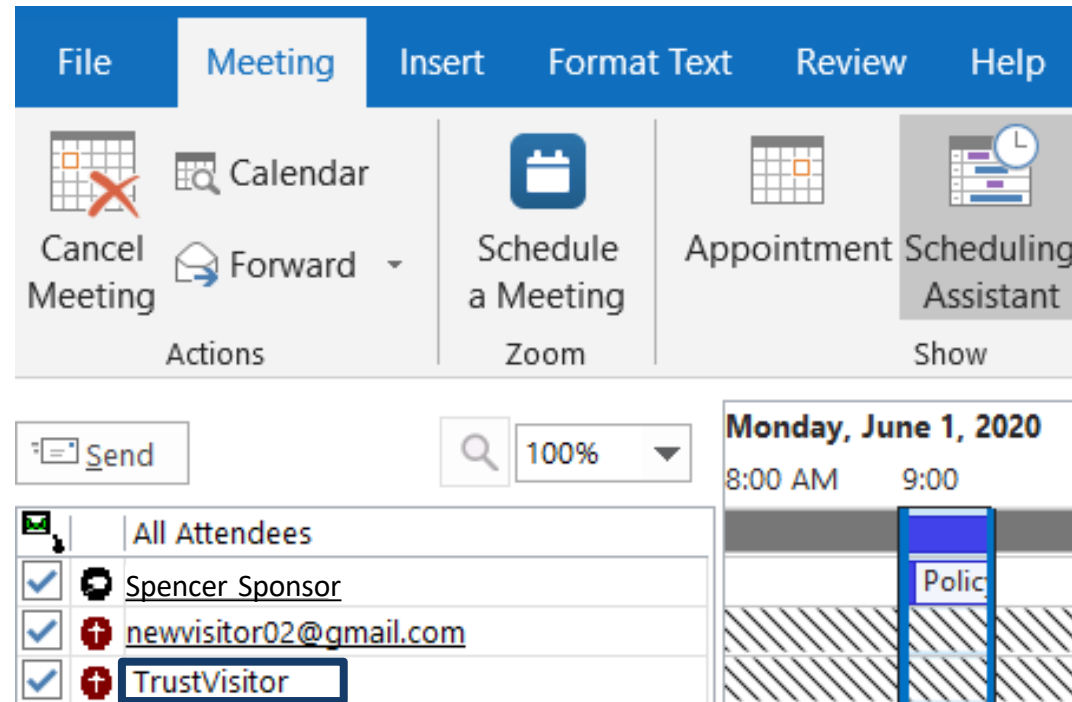
Duration: 5 seconds per event/meeting





TrustVisitor *Event Sponsor Experience*

1. The Sponsor creates a calendar invitation for the event or meeting, as they normally would, and adds TrustVisitor as an attendee:





TrustVisitor *Event Sponsor Experience*

2. The Sponsor receives a confirmation email from TrustVisitor with a summary of the event details:



Wed 5/20/2020 3:35 PM
Certipath's TrustVisitor Demo System <tv@trustvisitor.com>
Visitor Management Request Received for Policy Review

To: Spencer Sponsor

Visitor Management Request Received

TrustVisitor has received your request and has started processing:

Event:	Policy Review
Taking Place:	6/1/2020 at 9:00 AM
Location:	Reston_101
Visitor(s):	newvisitor02@gmail.com

Important: If you update this event in your calendar, you must select **Send updates to ALL attendees** in order to update the event in TrustVisitor.

More Information

For the latest updates about this request, you can reply to this email with one of the following commands:

- **#status** to view individual visitor status for this event
- **#resend [email address]** to resend the visitor registration email to a visitor
- **#ignore** to remove this event from TrustVisitor and stop all further processing

Thank you!

Powered by [TrustVisitor](#) – [CertiPath's](#) Visitor Management Solution

Note:
*Event Preauthorization
can be configured via
custom workflow*



TrustVisitor *Event Sponsor Experience*

3. At any time, a Sponsor can quickly learn the status of their visitors' registrations via email using the #status hashtag:

From: Spencer Sponsor

To: Certipath's TrustVisitor Demo System <tv@trustvisitor.com>

Cc:

Subject: RE: Visitor Management Request Received for Policy Review

#status

From: Certipath's TrustVisitor Demo System <tv@trustvisitor.com>
Sent: Wednesday, May 20, 2020 3:35 PM
To: Justin Garrison <justin.garrison@certipath.com>
Subject: Visitor Management Request Received for Policy Review

Visitor Management Request Received

TrustVisitor has received your request and has started processing:

Event: Policy Review



Wed 5/20/2020 3:42 PM

CT Certipath's TrustVisitor Demo System <tv@trustvisitor.com>
Status of Policy Review

To: Spencer Sponsor

Visitor Status for Policy Review

Thank you for inquiring about the visitor status for the following event:

Event: Policy Review
Location: Reston_101
Time: 6/1/2020 at 9:00 AM

Visitor Details

Not yet approved Visitors:

[newvisitor02@gmail.com](#) : Not Registered

Fully Approved Visitors:

More Information

To perform an action, reply to this email with one of the following commands:

- **#resend [email address]** to resend the visitor registration to a visitor
- **#ignore** to remove this event from TrustVisitor

Important: If you update this event in your calendar, you must select **Send updates to all attendees** to update the event in TrustVisitor.

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TrustVisitor *Visitor Experience*

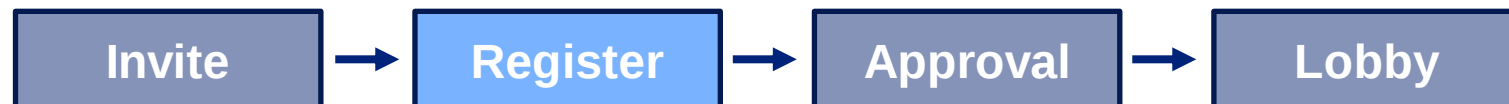


Action: Pre-register for an event

Description:

- The **Visitor** completes a short form in preparation for their visit, and pre-registers using their electronic credential or government issued ID.
- Context provided by the completed form allows for thorough security approval processing, and optimizes the lobby experience.

Duration: 10-30 seconds per visitor





TrustVisitor *Visitor Experience*

1. The Visitor receives an email from TrustVisitor with a link allowing them to pre-register for the event:

Event Registration Requested

You have been invited to the following event:

Event:	Security Roundtable
Taking Place:	04/19/2021 (2:00 PM - 2:30 PM)
Location:	Reston_101
Organizer:	Justin Garrison

Pre-Registration Link:

In order to expedite your lobby experience and provide you with the fastest possible entry, it is recommended that you please [click here](#) to pre-register for this event.

Thank you for your time and attention.

Please bring this QR Code with you to check-in to the event in the lobby.



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TrustVisitor *Visitor Experience*

2. The Visitor selects a registration method and submits their registration online:
(logo images, branding colors, and all visitor registration fields are fully customizable)

VISITOR REGISTRATION

CertiPath

Visit Details

Policy Review
4:30 PM - 5:00 PM, 09/03/2021

Reston_101
Justin Garrison

Please select your registration method from the choices below:

Use Existing Credential

1/4

PIV
JUSTIN SCOTT GARRI...
Contractor
Expires on: 02/08/2026

SELECT

Use a New Smart Card

Select this option if:

- You want to register a new Smart Card (PIV, PIV-I, or CAC), and
- Your device supports registering a Smart Card, and
- You want the fastest lobby time

SELECT

Use a Government Issued ID

Select this option if:

- You do not possess a Smart Card (PIV, PIV-I, or CAC), or
- Your device does not support registering a Smart Card

SELECT

Present Smart Card in Lobby

Select this option if:

- Your device does not support registering a Smart Card, and
- You will present your Smart Card to the lobby guard when you arrive

SELECT

Terms of Service Privacy Policy

TrustVisitor

Visit Details

Identity Credential

PIV
JUSTIN SCOTT GARRI...
Contractor
Expires on: 02/08/2026

Agreement(s) *

[Visitor NDA - PDF](#)

Personal Information

Full Name
JUSTIN SCOTT GARRISON

Are you a U.S. citizen? ☐ Yes ☒ No

Date of Birth
SSN

Place of Birth
Rome, Italy

Country of Citizenship
Italy

Address

Address
316 South Dogwood Drive

Apt/Suite

Country
USA

City
Harrisonburg

State
Virginia

Zip Code
22801-

Additional Information

[Click Here To Complete Wellness Screening](#)

SUBMIT



TrustVisitor Visitor Experience

3. An optional visitor wellness screening reminder may be sent 1 or 2 days (configurable) before the events starts:

Action Requested: Submit Wellness Screening for Policy Review Event

Certipath's TrustVisitor Demo System <tv@trustvisitor.com>
to me ▾

Wellness Screening Required for Event

For the health and safety of yourself and others in the facility, wellness screening is required for the following:

Event: Policy Review
Taking Place: 01/18/2021 (4:00 PM - 4:30 PM)
Location: Reston_101
Organizer: Justin Garrison

Action Requested:

Please [click here](#) to submit your wellness screening for this event.

Thank you for your time and attention.

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TrustVisitor

Please complete following Wellness Screening form before your scheduled event time.

Visit Details

Policy Review
4:00 PM - 4:30 PM, 01/18/2021
Reston_101
Justin Garrison

Wellness Screening

In the past 48 hours, have you experienced any of the following:

- A new fever (100.4°F or higher) or a sense of having a fever?
- A new cough that cannot be attributed to another health condition?
- New shortness of breath that cannot be attributed to another health condition?
- New chills that cannot be attributed to another health condition?
- A new sore throat that cannot be attributed to another health condition?
- New muscle aches (myalgia) that cannot be attributed to another health condition or specific activity (such as physical exercise)?

☐ Yes to one or more

☒ No, none of the above

SUBMIT



TrustVisitor Approver Experience

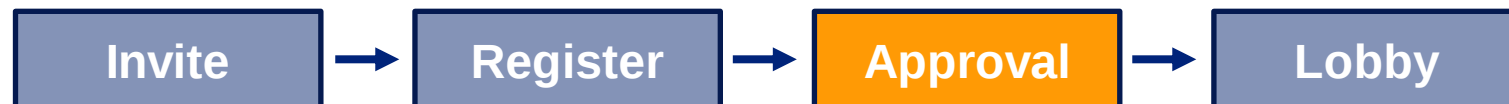


Action: Approve a visitor

Description:

- A designated facility security **Approver** is notified by email or Approvers module of the visitor's registration and is given the opportunity to approve or deny the request.
- Approval steps and approver(s) are set via custom workflow
- Optional integration with background check services can provide additional context about the visitor.

Duration: 10 seconds per visitor





TrustVisitor Approver Experience

1. Facility approver(s) receive notification of the visitor's registration via email.
To take action, reply with #approve, #escort, #reject, #DNA, and add comments:

Visitor Pending Approval - Security

The following Visitor requires your approval:

Visitor Details

Visitor Name: JUSTIN SCOTT GARRISON



Wellness Screening Symptoms: No
US Citizen: Yes
ID Type: PIV
ID Issuer: HOMELAND SECURITY, Department of
ID Expiration: 2/8/2026 12:00:00 AM

(continued)

Event Details

Event: Policy Review
Taking Place: 09/17/2020 (3:00 PM - 3:30 PM)
Located at: Reston_101
Sponsor Name: Spencer Sponsor
Sponsor Email: justin.garrison@certipath.com

Background Check PASS (as of 9/2/2020 8:29:43 PM)

Response

Please reply to this email with one of the following commands. Comments must be enclosed within (), {}, or []:

- **#approve [comment]** to mark JUSTIN SCOTT GARRISON as *Approved* for this event. Comments are optional.
- **#escort {comment}** to mark JUSTIN SCOTT GARRISON as *Approved: Escort Required* for this event. Comments are required.
- **#reject (comment)** to mark JUSTIN SCOTT GARRISON as *Rejected* for this event. Comments are required.
- **#DNA (comment)** to place JUSTIN SCOTT GARRISON on the Do Not Admit List. Comments are required.

Thank you!

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TrustVisitor Approver Experience

1b. Approvers can also manage visitors pending approval in the Approvers module. To take action, they click approve, escort required, reject, or DNA, and add comments:



Events

People

Visitor **JUSTIN SCOTT GARRISON**

Pending Security



Event Info

Event: Vendor Council
15:00 - 16:00 9/7/2021
Sponsor: Justin Garrison
Location: Reston_101

Credential Info

Type: PIV
Valid: Valid
Card Status in PACS: Inactive
Clearance In PACS: Inactive
Agency: HOMELAND SECURITY, D...
Expires: 2/8/2026
DOB: 10/10/1978

Approvals

Security: Pending
Location: Pending

APPROVE

ESCORT REQUIRED

REJECT VISIT

ADD TO DNA

Agreements

Visitor NDA - PDF - Required

Background Check

Pass on 09-03-2021 13:26

RERUN BACKGROUND CHECK

Comments

ADD COMMENT

4/29/2020, 1:03:00 PM - TrustVisitor Administrator
Event: JG Demoland Test
Accompanied by a service dog. Provided certificate for service animal, everything checked out.

Address

316 South Dogwood Drive
Harrisonburg, VA 22801-
justingarrison3@gmail.com



TrustVisitor Lobby Experience

Action: Check-in an approved visitor

Description:

- The **Lobby Guard** logs into TrustVisitor, views visitor data, and marks a visitor as arrived.
 - If a sponsor escort is required, TrustVisitor will automatically notify the escort via email upon arrival.
 - If no escort is required, the visitor may enter the facility.
 - Check-in via Kiosk is available as well

Duration: 0-15 seconds per visitor





TrustVisitor *Lobby Experience*

1. Upon logging into TrustVisitor, the Lobby Guard is presented with an intuitive streamlined user interface, including filtering and search tools:

The screenshot displays the TrustVisitor Lobby interface. At the top, there's a navigation bar with the TrustVisitor logo and icons for People, Kiosk, Admin App, and Approvals. Below this is a secondary bar with search options: Search By ID Scan, Scan QR Code, VIP, and Temp Badge. The main content area shows 'Custom Search Results. Visitors with Events Starting from 00:00 9/7/2021 - 23:59 9/17/2021' and 'Showing 1 to 12'. Five visitor status cards are visible, each with a photo, name, event details, and sponsor. The cards are categorized by status: Approved (green), Pending Registration (orange), Wellness Hold (green with a plus icon), Pending Security (orange with a plus icon), and Rejected (red). Below the cards are search filters for Event Location, Event Title, and Sponsor, all set to 'All'. There are also fields for Visitor Name and Status. On the right, there are three toggle switches for 'Will Require Temp Badge', 'US Citizen', and 'Wellness Hold', all currently set to 'Yes'. A 'CLEAR ALL FILTERS' button is at the bottom right.

Status	Name	Event	Sponsor
Approved	KUNDUZ AIDAROVA	Vendor Council 15:00 - 16:00 9/7/2021	Justin Garrison
Pending Registration	Selik Akakova	Vendor Council 15:00 - 16:00 9/7/2021	Justin Garrison
Wellness Hold	Rusty Dunn	Vendor Council 15:00 - 16:00 9/7/2021	Justin Garrison
Pending Security	JUSTIN SCOTT GARRISO...	Vendor Council 15:00 - 16:00 9/7/2021	Justin Garrison
Rejected	Erick Lehnsherr	Vendor Council 15:00 - 16:00 9/7/2021	Justin Garrison

Filters:

- Event Location: All
- Event Title: All
- Sponsor: All
- Visitor Name: [Search]
- Status: All
- Will Require Temp Badge: Yes
- US Citizen: Yes
- Wellness Hold: Yes
- CLEAR ALL FILTERS



TrustVisitor Lobby Experience

2. A Lobby Guard can view a visitor's status, registration info, assign a temp badge or Smart Card, scan an ID, request an unscheduled visit, view/add comments, and more:

The screenshot displays the TrustVisitor Lobby Experience interface. At the top, there's a dark blue header with the TrustVisitor logo and navigation icons for People, Kiosk, Admin App, and App. Below this is a green status bar with a close button (X), a US flag, the word 'Approved', a medical cross icon, a refresh icon, and another close button (X). The main content area is divided into three sections: Registration Info, Visitor Actions, and Comments. The Registration Info section shows a visitor's photo, name (KUNDUZ AIDAROVA), event (Vendor Council), time (15:00 - 16:00 9/7/2021), sponsor (Justin Garrison), and location (Reston_101). The Visitor Actions section contains three blue buttons: ASSIGN TEMP BADGE, REGISTER SMART CARD, and SCAN AN ID. The Comments section has an ADD COMMENT button and a comment box with a timestamp (5/5/2020, 12:44:41 PM) and text (TrustVisitor Administrator: Kunduz left her Ray Ban sunglasses in the meeting room on 4/28. Placed in Lost and Found bin.). A large 'VISITOR' watermark is visible in the background. At the bottom, there's a table with columns for Event, Time, Sponsor, and Location, showing multiple entries for the same event.

Event	Time	Sponsor	Location
Vendor Council	15:00 - 16:00 9/7/2021	Justin Garrison	Reston_101
Vendor Council	15:00 - 16:00 9/7/2021	Justin Garrison	Reston_101
Vendor Council	15:00 - 16:00 9/7/2021	Justin Garrison	Reston_101
Vendor Council	15:00 - 16:00 9/7/2021	Justin Garrison	Reston_101



TrustVisitor *Lobby Experience*

3. A Lobby Guard can submit wellness screening on behalf of an employee or visitor:

Wellness Screening [X]

Name: Kunduz Aidar	Submitted By: TrustVisitor
Screening Result: Passed	Administrator
	Submitted On: 6:05 PM, 01/21/2021

In the past 48 hours, have you experienced any of the following:

- A new fever (100.4°F or higher) or a sense of having a fever?
- A new cough that cannot be attributed to another health condition?
- New shortness of breath that cannot be attributed to another health condition?
- New chills that cannot be attributed to another health condition?
- A new sore throat that cannot be attributed to another health condition?
- New muscle aches (myalgia) that cannot be attributed to another health condition or specific activity (such as physical exercise)?

Test Result: 98.6

Comment

☐ Fail: Yes to one or more

☒ Pass: No, none of the above

SUBMIT



TrustVisitor Lobby Experience

4. A Lobby Guard can also view a person details page action and take action:

TrustVisitor			People	Kiosk	Admin App	Approvals
Visitor KUNDUZ AIDAROVA			Approved			
 Event Info  Event: Vendor Council 15:00 - 16:00 1/31/2022 Sponsor: Justin Garrison  Location: Reston_101		Registration Info Type: Driver's License Issuer: Illinois Expires: 2/24/2023 ID #: A361-5009-5655		Approver Comments Security: Approved Approval Comment Justin Garrison - 9/21/2020, 5:11:06 PM Location: Approved Approval Comment Justin Garrison - 9/21/2020, 5:12:58 PM		
MARK AS ARRIVED		REGISTER SMART CARD	SCAN AN ID	ASSIGN TEMP BADGE	PRINT BADGE	REQUEST UNSCHEDULED
Agreements		Lobby Comments			Address	
Visitor NDA - PDF - Required		ADD COMMENT Guard Comment 5/5/2020, 12:44:41 PM - TrustVisitor Administrator Event: TrustVisitor Demonstration Meeting Kunduz left her Ray Ban sunglasses in the meeting room on 4/28. Placed in Lost and Found bin.			visitor.certi@gmail.com	



TrustVisitor *Lobby Experience*

5. Visitors can check-in for events or request an unscheduled visit via kiosk:
(logo and branding colors are customizable)

Tue Sep 07
6:08 pm

SELF CHECK-IN

CertiPath

Check-In By Name

Request a Visit

Present Smart Card or Scan QR Code

To scan a QR Code, hold your device **1 foot away** from the camera
and **center the QR Code** in the window below:



Privacy Policy | Terms & Conditions

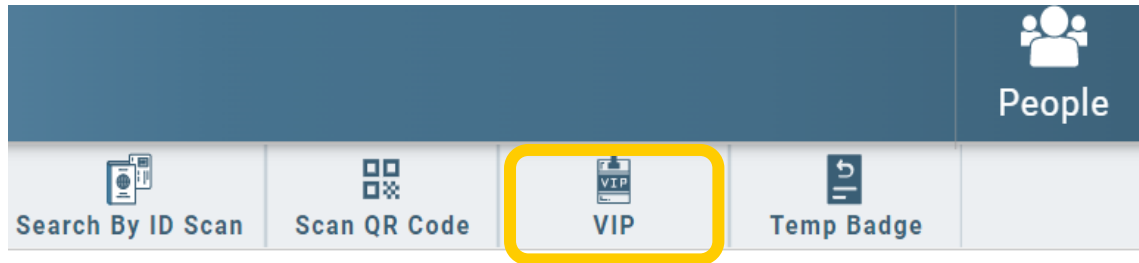
TrustVisitor



TrustVisitor *Lobby Experience*

Additional Lobby Actions:

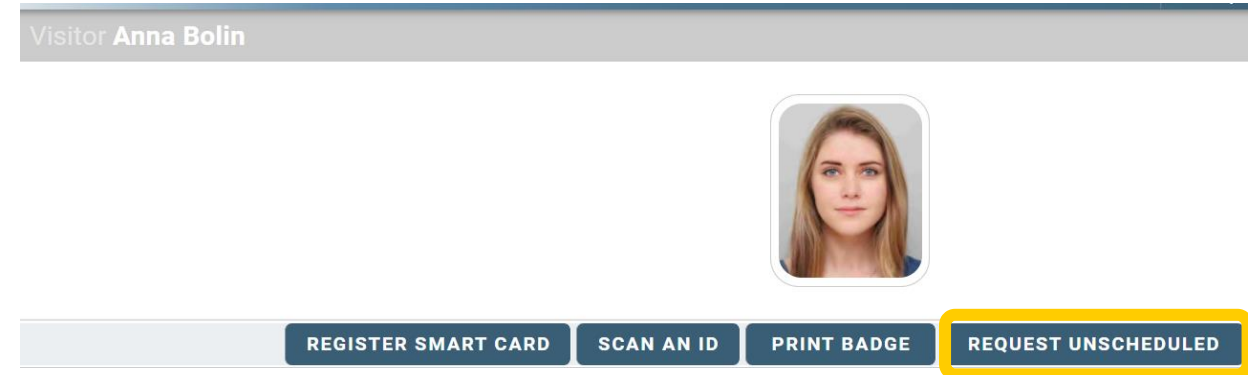
- Grant access to **VIP Visitors**



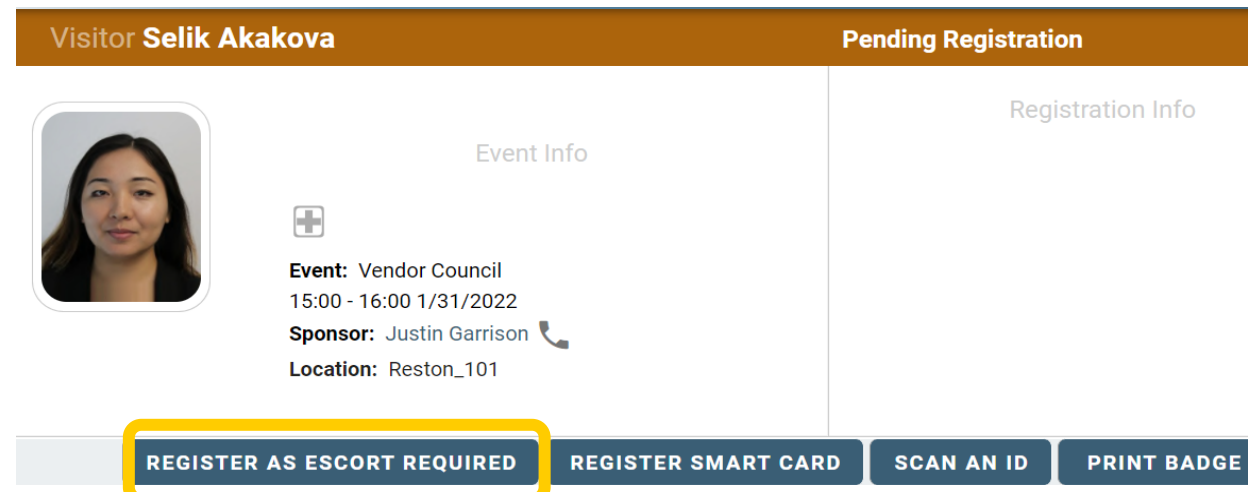
- Monitor **Kiosk Visitors**



- Process **Unscheduled Visitors**



- Process **Unregistered Visitors**





TrustVisitor

COMPLIANCE



WITH EASE

