

# settrax Best Practices for Using settraxVM

*Updated March 2026*

## About This Document

Settrax recognizes that every medical facility operates differently. This document is not a list of requirements — it is a collection of recommendations based on what we have seen work well across facilities of varying sizes, workflows, and compliance needs. Use it as a starting point, adapt what makes sense for your environment, and reach out to our support team when you need guidance specific to your situation.

This document is organized into three sections: Implementation guidance for facility administrators, a Staff Adoption guide for SPD managers and their teams, and a Vendor Communication Toolkit with ready-to-use templates.

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**Section 1:** Implementation Guide — for facility administrators and IT staff

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## Section 1

# Implementation Guide

Audience: Facility administrators and IT staff

## Before You Go Live

The single most common cause of a difficult Settrax launch is going live before internal decisions have been made. When staff and vendor reps encounter the system for the first time without clear policies in place, they fill the gaps themselves — inconsistently. Before your go-live date, work through the following decisions as a team and document your answers.

### Decisions to make before launch

- Who is responsible for scheduling cases in Settrax? Limiting this to one or two individuals improves accountability and reduces errors.
- What is your facility's check-in deadline? Settrax recommends a minimum of 24 hours before surgery start time.
- What is your checkout window? Settrax recommends 30 hours post-surgery start time.
- Will you enable Force Check Out? If so, what is your window and who will communicate this to vendor reps?
- What is your policy when a vendor rep arrives without having checked in? Your facility decides this. Settrax recommends allowing a one-time exception with documentation, then holding the line. See Section 2 for guidance on handling this with staff.
- Who is responsible for communicating Settrax expectations to vendor reps? See Section 3 for ready-to-use templates.
- Which compliance settings will you enable? See the Recommended Compliance Settings table below.

*Making these decisions before launch — and documenting them — gives your staff something concrete to reference and enforce. It also sets clear expectations with vendor reps from day one.*

## Kiosk Location

Where you place the Settrax kiosk has a significant impact on how well the system gets used.

**Our recommendation:** Place the kiosk in a secure, accessible location inside or immediately adjacent to the Sterile Processing Department.

When the kiosk is inside the SPD, staff can provide passive oversight without being pulled away from their work. Vendor reps and couriers are more likely to use it consistently when it is clearly part of the check-in process rather than an afterthought in a hallway.

Avoid locations that are behind locked doors — this creates delays, particularly for after-hours deliveries, and makes it easy for reps to justify bypassing the system. Avoid high-traffic areas where space constraints make it difficult to weigh and photograph trays properly.

When kiosk issues arise — a label roll that needs replacing, a camera that isn't focusing, a printer that has gone offline — proximity to the department significantly reduces downtime. Staff nearby can notice and address problems quickly rather than waiting for a vendor rep to report an issue that may have been present for hours.

## Scheduling Workflows

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Settrax supports several scheduling workflows. The right approach depends on your facility's staffing, volume, and operational needs. Many facilities use a combination of more than one.

### Facility schedules everything

The preferred workflow for most facilities. When your team enters cases directly into Settrax, vendors receive automatic time-stamped notifications via text and email. This keeps communication inside the system, creates an auditable record, and reinforces the expectation that all loaner instruments will be checked in through Settrax.

*We recommend scheduling cases a minimum of 96 hours in advance. Facilities scheduling early experience better vendor compliance and fewer late check-ins.*

### Vendor self-schedules at the kiosk

Some facilities allow vendor reps to create cases at the kiosk when they arrive. This workflow works best as a backup option rather than a primary workflow, as it provides less advance notice and reduces the facility's visibility into upcoming cases. If you use this workflow, pair it with clear check-in timeline expectations communicated to vendor reps in advance.

### Remote vendor scheduling

With this feature enabled, vendor reps can create and manage cases from their Settrax dashboard before arriving onsite. This is particularly useful for emergent or last-minute cases and for facilities with high courier delivery volume. Remote scheduling does not replace in-person kiosk check-in — vendors must still complete check-in at the facility before the procedure. This feature is facility-controlled and must be enabled by your Settrax administrator. To enable this feature contact your Settrax account manager or our support team.

### EMR integration

Settrax integrates with EMR systems including Epic and Cerner. When configured, surgical cases flow directly into Settrax from your scheduling system, eliminating manual entry and reducing errors. This is the most efficient workflow for high-volume facilities. Contact your Settrax representative to discuss integration setup.

### Mixed workflows

Many facilities use a combination of the above. A common example is facility-scheduled cases as the primary workflow with vendor scheduling at the kiosk available for emergencies. Whatever combination you use, the key is that expectations are clearly communicated to everyone involved so that no one is uncertain about what is required of them.

### Recommended Compliance Settings

The following settings are available in your Settrax dashboard. Settings marked with an asterisk (\*) include notes on exceptions.

Compliance Setting	What It Does	Recommendation	Notes
Vendor List Filtering	Vendor reps must be granted facility access before they can be scheduled or use your kiosk	ON	Prevents unauthorized access and scheduling errors
IFU Hard Stop	Cases cannot be checked in without an IFU attached	ON	Eliminates liability for use of incorrect sterilization instructions
IFU Compliance Mark	Flags cases where no IFU is attached, without blocking check-in	ON	
Force Check Out	Trays not checked out within 72 hours of surgery start are automatically checked out	ON*	Exceptions recommended for departments without daily operations or 24/7 vendor access
Force Check Out Compliance Mark	Flags cases where Force Check Out was triggered	ON	Vendor reps should still be documenting instrumentation before leaving
Late Check In	Flags trays checked in less than 24 hours before surgery	ON	Late check-ins do not allow adequate time for sterilization and can impact patient outcomes
Late Check Out	Flags trays checked out more than 30 hours post-surgery	ON*	Same exceptions as Force Check Out apply
No Count Sheet	Flags cases without an attached count sheet	ON	Count sheets are essential for verifying instruments before and after surgery
Policy Violation	Allows manual flagging of compliance issues not automatically captured	ON	

Compliance Setting	What It Does	Recommendation	Notes
Behavior Related	Allows manual flagging of behavior-related concerns	ON	

## Key Timelines at a Glance

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Milestone	Recommended Timeline
<b>Case scheduled in Settrax</b>	Minimum 96 hours before surgery
<b>Vendor acknowledges case</b>	Within 48 hours of surgery start time
<b>Loaner trays checked in</b>	Minimum 24 hours before surgery
<b>Loaner trays checked out</b>	No more than 30 hours after surgery start
<b>Force Check Out triggers</b>	72 hours after surgery start (customizable)

## Section 2

## Staff Adoption Guide

*Audience: SPD managers and their teams*

Settrax works best when every person in the process — facility staff, vendor reps, and couriers — understands what is expected of them. This section is written for SPD managers to use with their teams. It covers what Settrax changes about your day-to-day workflow, how to handle common challenges, and what to do when vendor reps don't follow the process.

### What Settrax Changes — and What It Doesn't

Settrax does not change what your team does. You still receive loaner trays, process instruments, and support surgical cases the same way you always have. What Settrax changes is the documentation around those activities — specifically, it moves accountability for loaner instrument check-in and check-out to the vendor rep, where it belongs.

Before Settrax, your team may have had limited visibility into what was being delivered, when, and in what condition. With Settrax, every tray is photographed and weighed at check-in, labeled with case-specific information, and documented throughout its time at your facility. That documentation protects your department.

### Understanding Roles

One of the most common sources of confusion during Settrax adoption is unclear role boundaries. Here is a plain-language breakdown.

#### **The vendor rep or courier is responsible for:**

- Confirming case details in Settrax once a case has been scheduled by your facility.
- Checking in all loaner trays at the Settrax kiosk before the procedure
- Weighing and photographing each tray layer at check-in
- Printing and attaching Settrax labels to trays
- Checking out trays within your facility's required window post-surgery
- Documenting any discrepancies or damage at checkout

#### **Your team is responsible for:**

- Scheduling all surgical cases in Settrax in advance of the procedure, with a minimum of 96 hours notice where possible.
- Verifying that incoming trays have a Settrax label attached
- Accessing the case in Settrax to confirm images and weights were captured
- Noting any visible damage using the tray note feature in Settrax

- Enforcing your facility's Settrax policies consistently

### **Settrax support is responsible for:**

- Technical issues with the kiosk, printer, or camera
- Account access and password resets
- Adding procedures or configuring compliance settings
- Answering questions about system functionality
- Providing guidance on workflow best practices and compliance optimization as your facility's needs evolve — we are here to help you get the most out of Settrax, not just troubleshoot when things go wrong

## **When a Vendor Rep Arrives Without Checking In**

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This is the most common challenge SPD teams face, and it is worth addressing directly. The reality is that your team needs those trays regardless of whether the vendor complied with the check-in process. Settrax does not expect you to put patient care at risk to enforce documentation requirements. That is your facility's decision to make, not ours.

What we do recommend is a consistent, documented response that makes clear the expectation going forward.

### **First offense**

Allow the trays through. Document the exception in Settrax using the tray note feature or your facility's preferred method. Notify the vendor rep directly — in writing if possible — that this is a one-time exception and that future deliveries require Settrax check-in. A vendor rep who knows their exception has been logged is far more likely to comply next time.

### **Repeat non-compliance**

Escalate to your SPD manager or director. At this point the issue is no longer a training problem — it is a compliance problem that needs to be addressed at a higher level, potentially involving the vendor rep's company. Settrax compliance reports can be used to document the pattern and support that conversation.

*The key in both cases is documentation. Settrax gives you the tools to create a timestamped record of non-compliance. Use them. That record is your department's protection.*

## When a Vendor Rep Pushes Back

Vendor reps occasionally resist using Settrax, particularly if they are new to the system or accustomed to informal check-in processes at other facilities. Here is guidance on the most common pushback scenarios.

What the vendor rep says	How to respond
"I don't have a Settrax account."	Vendor reps can create an account at the kiosk in less than 10 minutes. Direct them to the kiosk and offer to contact Settrax support if they need assistance.
"I'm sharing an account with another rep."	Account sharing violates both Settrax policy and your facility's compliance requirements. Each vendor rep must have their own individual account. Direct them to <a href="https://settrax.com/vendor-registration">settrax.com/vendor-registration</a> .
"I don't have time."	The check-in process takes less than 10 minutes for most cases. If time is a consistent barrier, the more likely issue is unfamiliarity. Settrax support can provide a walkthrough.
"Other facilities don't require this."	Your facility's policies are your facility's policies. A calm, simple response: "This is our requirement. We're happy to help you get set up if you need it."

## What Success Looks Like

Settrax adoption doesn't happen overnight. Here is a realistic picture of what to expect.

### At 30 days

Most vendor reps who work with your facility regularly will have accounts and will be checking in consistently. You may still be working through edge cases with occasional reps or couriers. Your team is building familiarity with the dashboard and compliance reports.

### At 60 days

Compliance rates are improving. Your team is using tray notes and compliance flags consistently. You have a clear sense of which vendor reps are repeat non-compliers and can begin addressing those patterns formally.

### At 90 days

Settrax is part of your standard workflow. Exceptions are rare and documented. Your compliance data gives you a clear picture of vendor performance that you can share with leadership or use in vendor conversations.

*If you are not seeing progress at these milestones, contact your Settrax representative. Adoption challenges are almost always solvable with the right targeted support.*

Section 3

## Vendor Communication Toolkit

Audience: Facility administrators — ready-to-use templates

Good vendor communication is the single highest-leverage thing a facility can do to improve Settrax adoption. When vendor reps know exactly what is expected of them before they ever arrive at your facility, compliance improves significantly. Customize each template with your facility name, relevant dates, and any facility-specific policies.

### Template 1: Welcome to Settrax

**SEND TO: ALL ACTIVE VENDOR REPS BEFORE GO-LIVE, OR WHEN ONBOARDING A NEW VENDOR**

**Subject: Settrax Requirements at [Facility Name]**

Hi [Name],

[Facility Name] uses Settrax to manage loaner instrument documentation. This email outlines what you need to know before your next delivery.

**What you need:**

A Settrax account. If you don't have one, you can register at [www.settrax.com/vendor-registration](http://www.settrax.com/vendor-registration) or at the kiosk when you arrive. Each rep must have their own individual account — shared accounts are not permitted.

**What we require:**

All loaner trays must be checked in through the Settrax kiosk before the procedure. This includes weighing and photographing each tray layer and printing and attaching Settrax labels.

Our check-in deadline is [X hours] before surgery start time. Trays must be checked out within [X hours] post-surgery.

**Where the kiosk is:**

[Insert kiosk location]

**Questions?**

Contact Settrax support at [support@settrax.com](mailto:support@settrax.com) or 866-900-0375, weekdays 5am-5pm PT.

Thank you for your cooperation.

*[Your name and title]  
[Facility Name]*

## Template 2: Policy Reminder

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**SEND TO: VENDOR REPS WHO ARE NOT FOLLOWING CHECK-IN REQUIREMENTS**

**Subject: Reminder — Settrax Check-In Requirements at [Facility Name]**

*Hi [Name],*

*This is a reminder that [Facility Name] requires all loaner instrumentation to be documented through the Settrax kiosk prior to each procedure.*

*Our records indicate that recent deliveries have not been fully documented through Settrax. Going forward, all trays must be checked in before they can be accepted for processing.*

*If you need help with your Settrax account or the check-in process, please contact Settrax support at [support@settrax.com](mailto:support@settrax.com) or 866-900-0375.*

*We appreciate your attention to this.*

*[Your name and title]  
[Facility Name]*

## Template 3: Force Check Out Announcement

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**SEND TO: ALL VENDOR REPS — BEFORE ENABLING THE FORCE CHECK OUT FEATURE**

**Subject: Important Update — Loaner Tray Check-Out Policy at [Facility Name]**

*Hi [Name],*

*Effective [Date], [Facility Name] will be enabling the Force Check Out feature in Settrax.*

*What this means for you: Any loaner instrumentation not checked out via the Settrax kiosk within [X] hours of surgery start time will be automatically checked out of the system. Once trays are force checked out, the ability to invoice for lost or damaged items is forfeited.*

*To protect your ability to document discrepancies, please ensure all trays are checked out through the Settrax kiosk within the required window.*

*[Facility Name] is not a storage facility and does not assume liability for items not retrieved in a timely manner.*

*If you have questions about this policy, please contact [contact name] at [email]. For Settrax technical support, contact [support@settrax.com](mailto:support@settrax.com) or 866-900-0375.*

*[Your name and title]*

*[Facility Name]*

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## Template 4: Account Sharing Warning

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**SEND TO: VENDOR REPS WHERE ACCOUNT SHARING HAS BEEN IDENTIFIED**

### **Subject: Settrax Account Sharing — Action Required**

*Hi [Name],*

*It appears that your Settrax account is being shared with another representative. Account sharing violates both Settrax's terms of service and [Facility Name]'s compliance policy.*

*Each vendor representative is required to have their own individual Settrax account. Shared accounts prevent accurate documentation and remove individual accountability from the compliance record.*

*Please ensure that all representatives from your company working at [Facility Name] have registered for their own accounts. Registration is free and takes less than 10 minutes at [www.settrax.com/vendor-registration](http://www.settrax.com/vendor-registration).*

*Continued account sharing may result in restricted access to our facility.*

*[Your name and title]*

*[Facility Name]*

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## Template 5: Escalation Notice

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**SEND TO: VENDOR COMPANY LEADERSHIP WHEN A REP IS A REPEAT NON-COMPLIER**

**Subject: Settrax Compliance Concerns — [Rep Name] at [Facility Name]**

Hi [Name],

I am reaching out regarding ongoing Settrax compliance issues with [Rep Name], who represents [Company Name] at [Facility Name].

Despite previous communication regarding our check-in requirements, we continue to see non-compliance with the following: [list specific issues — late check-ins, bypassing kiosk, account sharing, etc.].

I have attached a compliance summary from our Settrax dashboard for your reference.

We value our relationship with [Company Name] and want to resolve this cooperatively. Please connect with [Rep Name] to ensure they understand and follow our Settrax requirements going forward.

If this continues to be an issue we are prepared to restrict facility access until compliance is established.

I am happy to discuss this further. Please feel free to reach out directly.

[Your name and title]  
[Facility Name]  
[Phone/email]

**Need help?**

Settrax support is available weekdays 5am–5pm PT.

Live chat: [app.settrax.com](https://app.settrax.com) | Email: [support@settrax.com](mailto:support@settrax.com) | Phone: 866-900-0375