



Technical Assistance in the Time of Covid-19

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Who is OTA?

The Massachusetts Office of Technical Assistance (OTA) is a non-regulatory agency within the Executive Office of Energy and Environmental Affairs that provides free, confidential, onsite technical and compliance assistance to manufacturers, businesses and institutions.

About OTA's Technical Assistance

OTA technical assistance providers can help facilities:

- Identify opportunities to reduce risks associated with use, storage, and processing of hazardous chemicals
- Identify opportunities to reduce employee exposures and provide a safer workplace
- Address potential safety issues and enhance compliance with regulations
- Identify and evaluate inherently safer processes and chemistries
- Identify ways to reduce overhead costs through energy, water, and materials conservation

How We Got Here

With COVID-19 restrictions on travel and in-person visits, we needed to adjust the way we do business...

- **Currently, we are not permitted to do any on-site work** (auditing, inspections or assistance)
- Other agencies were doing “drive by” inspections and desk audits of required paperwork and permits
- Increased concerns related to the exposure to cleaning chemicals used to fight the pandemic

We needed to identify a way to continue to assist companies that were open—**without** going on site.

On-Site Visits

Other reasons not to do in-person visits right now (besides the fact that we're not allowed...)

Liability:

- What if we unknowingly brought COVID-19 into a workplace?
- What if one of our team contracted COVID-19 from a workplace?

Logistics:

- Most companies have restricted facility access
- Where to have opening/closing meetings?
 - Inside (controlled environment, but close quarters) vs. outside (more space, but weather concerns)
- Safety/PPE needs (N-95 masks, glasses, shields, gloves...)

No one wants to be (or be labeled) a spreader of this virus

Remote Site Visits

Using technologies available to almost everyone, we felt that a remote approach would be the best option

Zoom, MS Teams, Duo, and Facetime are all readily available platforms that are available at little or no cost to companies

Questions to address:

- Maintaining confidentiality on open platforms
- How to get information that is normally shared in-person
- How many attendees to include
- How to do a facility tour
- Type of visit
 - General Visit – Full site tour; look at everything
 - Focused Tour – Look at the one or two areas of concern

Researched approaches of other organizations – MassDEP, IAC, utilities, consultants

Our Approach

Planning the Visit

- Guidance document for staff for planning & conducting remote visits.
- Use our standard intake process - previsit questionnaire.
- Discuss visit specifics – focus areas, structure (opening meeting, tour, closing meeting).
- Information for visit obtained from company – attendees, SDSs, layout, etc.
- Visit protocol described to company – use Zoom/Teams, headset, phone camera, best practices, **not recorded**.

Documents sent to companies

- [Virtual Site Visit Preparation Template](#)
- [Virtual Site Visit Instructions for OTA Clients](#)

OTA Virtual Site Visit Preparation Template

Company Name:	Date of Site Visit:
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OTA Staff Lead:	OTA Secondary Staff:
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Main Company Contact (must be reachable during site visit in case of disconnection):	Contact Phone (must be reachable during site visit in case of disconnection):
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Contact Email:

Virtual site visit protocol: OTA staff would like to engage your company in a virtual Zoom site visit. All services provided by OTA are free and confidential under the Toxics Use Reduction Act (TURA), and therefore, will never be recorded. Only staff approved by the OTA company contact will be allowed into the meeting. In the event that an unknown person joins the Zoom meeting, the meeting will be terminated by OTA staff who will then call you directly at the phone number that you have provided.

In order to best serve your needs please supply OTA with the following items **1 week** before the scheduled virtual site visit. Following a review of the requested information, OTA will contact you to address any additional questions and finalize the schedule for the visit.

Please provide the following requested items to:

OTA Staff Name	OTA Staff Email	Deadline
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Names of company staff allowed into the zoom meeting:	SDS sheets or pictures of product labels:
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Pictures of facility areas:	Pictures of equipment:
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Process flow diagrams:	Facility floor plan:
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Other relevant information:

Company Requirements During Virtual Site Visit: See the **Virtual Site Visit Instructions for OTA Clients** document sent to you by your OTA contact for a description of the technology requirements and procedures that will be used to conduct the virtual visit.

Virtual Site Visit Instructions for OTA Clients

Before the Site Visit

- Complete and return to your OTA contact the **Virtual Site Visit Preparation Template** they send to you.
- **Make sure the smartphone or tablet used for the virtual site visit:**
 - Is fully charged
 - Has Zoom installed on it - ensure you are familiar with the software, particularly the use of your audio and screen sharing prior to the visit to avoid unnecessary delays
 - Has notifications disabled to prevent disruption of the site visit
 - Has internet connection within all areas of the facility to be accessed during the visit
 - Is capable of sharing photos
- **Make a plan** with your OTA contact for how you will signal issues, such as loss of audio, to one another during the call (e.g., via Zoom chat, raised hands in Zoom, or text message).
- Exchange cell phone numbers with your OTA specialist for day-of-visit troubleshooting.
- Your OTA contact will conduct a “practice visit” with you to address any equipment or procedural issues so that the actual visit can be conducted as efficiently as possible.

At the Start of the Site Visit

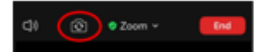
- **If you will be guiding the tour, log into the Zoom meeting using a cell phone or tablet.**
- If you will also be showing slides or video, you can also log into the call from a computer. If you join the call from two devices, please mute yourself and turn off the audio on whichever device you're not actively using to prevent audio feedback.
- **Make sure you have your cell phone on you during the visit, in case the Zoom call freezes** and your OTA Specialist needs to reach you.
- **Disable Bluetooth on your cell phone before the tour portion of the site visit to prevent your phone's audio from connecting to other Bluetooth devices nearby.**
- **Bring a flashlight** with you on the tour in order to properly view labels or dimly lit areas.

During the Site Visit

- You may find it helpful to view the participants using “gallery view,” which tiles **all** of the meeting participants. “Speaker view” shows the active speaker, which will change every time a different person talks.

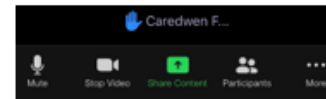
- **When the tour is about to start, “flip” the camera on your phone using the “flip camera” button.** This will change the camera from a portrait or “selfie” view to a forward-facing view, which will allow the person giving the tour the ability to see what they are sharing.
- Move the phone or tablet slowly and deliberately to avoid a blurred image.
- Hold your phone or tablet sideways, in “landscape mode,” to make the viewing area larger on participants’ screens.
- Video share in full screen or presentation mode.
- Use a wired headset for audio during the tour—this will improve the call quality.
- Email any documents and photos requested by OTA **in the course of** the visit to your OTA contact before the end of the visit.
- **Keep an eye on the meeting controls to see if anyone is trying to send you a message by chat, or if anyone has a “raised hand”** (see guidance below).

The “flip camera” setting at the top of the screen, circled in red, allows you to switch between forward-facing and “selfie” cameras.

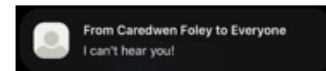


Navigating Zoom's Chat and Raise Hand Features

If a participant raises their hand to ask a question, you'll see it in **blue** at the bottom of your screen.



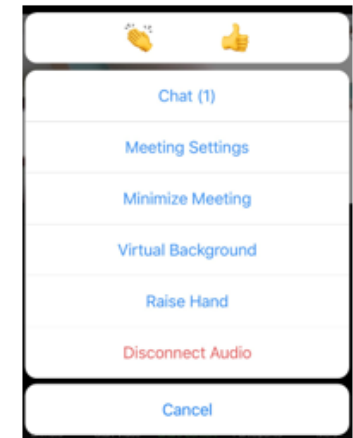
When a participant first sends a chat message, it will appear briefly at the bottom of the screen.



After a new chat message disappears from the screen, the phone screen will display a **red** badge on the “More” menu with the number of unread messages.



Clicking on the “More” menu will allow you to access the chat.



Assistance To-Date

Virtual visits -

- Medical device manufacturer (large facility) – P2
- Paint manufacturer (small facility) – energy efficiency
- Precision jewel manufacturer (small facility) – P2

Virtual meetings -

- Regional transit authority – reg compliance, climate resiliency
- Ceramics manufacturer (R&D facility) – regulatory (PFAS)
- Pharmaceutical company – reg compliance
- Commercial laundry – TURA filing
- Plastics company – regular meetings re: regulatory compliance and P2

Conclusions

- Remote assistance works!
- More preparation for remote visits –
 - Good communication is vital
 - Planning focus of visit
 - Information gathering
 - Describing how visit will be conducted
- Technology used for visits not an issue –
 - Companies already using Zoom/Teams
 - Phone and tablet cameras easy to use, provide sufficient quality
 - **But - Do a practice visit** – screen sharing, headset and camera use
- Fine-tune your protocol based on visit experience

CONTACT US

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