Virtual Inspection Documents

Note: Documents must be named with the standard number in front of the title.

1. Navigate to the document library in the compliance application. Refer to *How-To: Navigate the Application (Applicant)*, IT.GDE.8.005 in the Portal Resource Center on the FACT Website for assistance.

2. Select the Virtual Inspection Documents tab.

3. Select Choose Files to upload a new document.

4. Select the document.

5. Check the box for Virtual Inspection.


7. The document is uploaded to the Virtual Inspection Documents, Full List, and Latest Documents tabs.
Virtual Inspection Using Zoom

8. Download the latest version of Zoom from the Download Center and check for updates the day prior to the inspection to allow time to update if needed:
   https://zoom.us/download

9. Navigate to www.zoom.com and log in using your credentials. Select the zoom meeting link in the agenda.
   Note: You do not have to log in to Zoom to join as a participant.

10. The Open Zoom Meetings? window displays. Select Open Zoom Meetings.
    Note: The option to always allow zoom.us to open links of this type in the associated app may be chosen by checking the box.

11. A Video Preview window may display. Select Join with Video or Join without Video.

12. If the host has not started the meeting, a window will open displaying a message: Waiting for the host to start this meeting. After the Host starts the meeting, you will automatically be placed into the meeting.

    Note: The option to automatically audio by computer when joining a meeting can be chosen by checking the box.
14. The camera may be turned on by selecting Start Video.

Note: No virtual backgrounds are to be used during the inspection.

15. The meeting display may be maximized to encompass the entire monitor’s space by selecting the square in the upper right-hand corner.

16. Information regarding the meeting, including the Password and the Link to invite another participant, is located on this screen. At any time during the meeting, the meeting information may be accessed by selecting the meeting information symbol (windows) or the shield symbol (Mac) at the top left of the screen.

17. To speak with attendees, select Chat. The Zoom Group Chat window opens. A field is provided to enter a message. The message may be sent to all attendees (everyone), or to an individual only (private message).

18. Within Chat, files may be uploaded and shared with everyone or an individual.

Note: Do NOT upload files to Chat containing PHI.

19. To view all participants in the meeting, select Participants.

Note: Do not share any confidential information with the inspector unless all participants are identified.
20. To change the name displayed on the video, select Participants.

21. Hover the mouse over the name and select *More* to rename the display name.
22. During the inspection, attendees will be asked to share a screen and display a document. Select 

*Share Screen*, then choose which screen to share.

*Note: If only sharing one document, select the single document. If sharing multiple documents, then select the entire Screen to share.*

For example, to share a Word document, either Screen 2 or the document itself may be shared as highlighted below. If the document is shared, the other participants will only be able to see that document, and you will need to select *New Share* to display another document or screen. If the screen is shared, then anything on that screen will be seen by the participants until sharing is stopped or a *New Share* is selected.

23. If you have shared a screen or document and would like change what you then and select 

*New Share*. The window above will display and allow you to select a different screen or document.

24. When finished sharing the screen, select *Stop Share*. 

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ACC.GDE.6.001, Zoom How-To Guide for Virtual Inspections: Applicants, R1, 01/20/2021
Remote Control During Screen Share

While screen sharing, you can give remote control to another participant who is in the meeting, such as the Inspector. This allows the inspector to scroll through a document you share.

25. While sharing your screen, select *Remote Control* and choose the participant you want to give control to. The participant can click anywhere on their screen to start control.

26. To regain control, click anywhere on your screen. The other user can still restart remote control by clicking on their screen.

27. To stop remote control, select *Stop Share* or *New Share* to regain control and not allow the other participant to start remote control again.

28. If selecting a new document to share, you can give remote control back to the user by following step 1.
Speaker View and Gallery View

Zoom offers two ways of viewing the meeting when a screen is not being shared, *Speaker View* and *Gallery View*. *Speaker View* displays the current speaker in a large window, with the other participants in small windows above. *Gallery View* displays thumbnail pictures of participants in a grid pattern, which will change as the number of participants changes.

**Speaker View**

This large window will show whomever is currently speaking.
29. To change the view, select View in the top-right corner, then select Speaker or Gallery.

30. This view can be changed at any time.

Screen Sharing and Side-by-side Mode

31. There are two options when viewing a shared screen:
   a. The speaker(s) at the top of the screen and the shared screen large in the center of the meeting or
   b. Side-by-side mode with the shared screen side-by-side with the participants.
32. When viewing a shared screen, select View Options, then select Side-by-side Mode. This displays the shared screen on the left and either the speaker view or the gallery on the right side of the screen.

33. Hover the mouse over the boundary between the shared screen and the participants’ videos until it changes to a double arrow and there is a grey line separating both views. Select and drag this line to adjust the size of the views.

34. To turn off the side-by-side mode, selected View Options and uncheck the Side-by-side Mode option.

Pinning a Video

35. It may be necessary to pin a video during the meeting to focus the view on a particular screen. When in Speaker View, this will keep the pinned video as the large video in your meeting view.

36. Hover over the top right of the window of the video to be pinned, then select “...”.

37. Select Pin.

38. The Host has the option to pin more than one video, though other attendees can only pin one.

39. To return to Speaker View that displays the active speaker, select Remove Pin in the upper left corner of the pinned video.

40. Once a video has been unpinned, you may need to toggle between Speaker View and Gallery View again, according to your preference.
Connecting and Sharing Screen Using a Cellular Phone

It might be necessary to access Zoom using a phone’s camera to display evidence (e.g., a piece of equipment, a maintenance tag) to the inspector.

For Android Phones:

41. Download the current version of the Zoom application onto the phone.

42. Open Zoom, select Join a Meeting.

43. Enter the Meeting ID (11-digit number). This information is in the inspection agenda or refer to Step 16.

44. Before joining, the display name may be changed. Typically, it displays as the phone type. Select the field to customize the name. Note: Use “First Name Phone” to distinguish phone users, if last name is included, the display becomes too long to identify easily.

45. Select Join.
46. To change the display name once in the meeting, select *Participants*.
   a. Select the carrot next to the device name.
   b. Select *Rename* to change the display name.

47. A password is required. This can also be found in the inspection agenda or refer to Step 16. Enter the password, then select *OK*.

48. If the host has not started the meeting, a window will open displaying a message: *Waiting for the host to start this meeting.* After the Host starts the meeting, you will automatically be placed into the meeting.

49. **Mute the phone or do not join computer audio.** Having the same audio open on two devices in the same room will cause feedback.

50. The controls are similar to the desktop. To share the camera on the phone to display evidence, select *Share*.

51. A menu opens. Select *Camera*. Note: *Permissions may need to be granted to the app to allow use of the camera and the camera orientation (selfie vs. regular) may need to be selected prior to sharing.*
52. Anything displayed on the phone camera will be displayed on the Zoom meeting screen to all participants.

*Note: To avoid motion sickness, please only share the camera once in position to display the evidence that has been requested.*

53. To highlight a particular item displayed on the camera, select *Pause Camera* on the upper left-hand portion of the screen.

54. A pen icon displays.

55. Use the *Pen or Highlight* to highlight an item, such as calibration expiration date.

56. To resume live sharing, select *Resume Camera*.

57. To stop sharing the camera, select *Stop Share*.

58. When finished with the meeting, select *Leave*, then select *Leave Meeting*. 
For iPhone and Android Phones:

When using an iPhone, the option to share camera is not available.

59. Video can also be shared by selecting Start Video. Using video this way allows the phone user to toggle the camera setting between selfie mode (showing the person holding the phone) or forward mode (showing what the phone is pointed at).

60. To toggle between modes, select the camera icon in the top left of the screen.

61. This function does not allow users to pause the video to show a still frame or highlight items in the shot.

62. When finished showing video, select Stop Video.

63. When finished with the meeting, select Leave, then select Leave Meeting.