

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

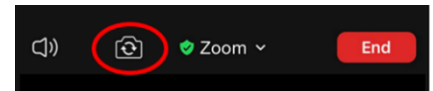
- If you will be guiding the tour, log into the Zoom meeting using a cell phone or tablet.
- If you will also be showing slides or video, you can also log into the call from a computer. If you join the call from two devices, please mute yourself and turn off the audio on whichever device you’re not actively 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.

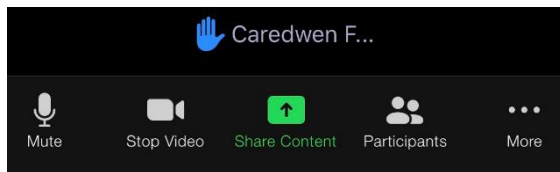
- When the tour is about to start, “flip” the camera on your phone using the “flip camera” button. This will change the camera from a portrait or “selfie” view to a forward-facing view, which will allow the person giving the tour the ability to see what they are sharing.
- Move the phone or tablet slowly 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.

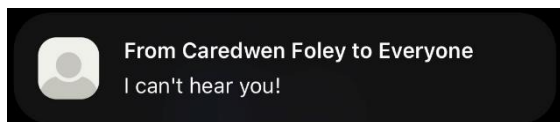


Navigating Zoom’s Chat and Raise Hand Features

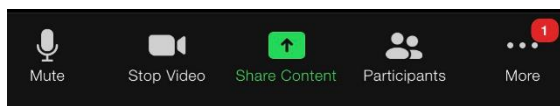
If a participant raises their hand to ask a question, you'll see it in **blue** at the bottom of your screen.



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.

