Conducting an Inspection: A *User’s Guide*

This procedure describes how to conduct an inspection using the EH&S Assessment and Inspection Management System, and covers Pre-inspection Setup, Using the Electronic Checklist, Additional Inspection Tools, Completing an Inspection, and Appendices (which include EHS Equipment Sign-out, Use of 4g Jet Pack, and Using MyScript).

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Starting an Inspection

1. To begin a new inspection, select the **New Inspection** subtab from the choices below **Inspections** in the left menu.
2. An open inspection can be continued by choosing **Continue an Inspection**.
3. Before beginning an inspection, search for a research group (lab).
   - Can be completed onsite using iPad, or at any time before starting inspection on desktop computer. Choose **Confirm Selection** to confirm the Group.
Pending Inspections

1. Select **Pending Inspections** from the **Inspections** section of the left menu.
2. Choose from **Asset Inspections** and **Group Inspections** (Space Inspections are facilities-based).
3. If the lists are long, narrow them by inputting a **Start Date** and **End Date**.
4. Select the particular lab you wish to inspect by clicking on it.

**NOTE:** Check to make sure your labs are correctly configured at least one week before a scheduled inspection, especially for new or first time inspections. If you do not find a lab group, contact the system administrator by email at **lab_safety@harvard.edu** or call 6-3797 to change your user status.
Inspection Settings and Roster

Once a **Group** location has been chosen, you will be prompted to the **Settings** tab, where you will specify the Inspection Settings.

1. Select the **Inspection Type** from the drop down menu. **NOTE:** “General Lab” is often the default setting.

2. Next, select the correct **Department** from the drop down menu (if it is not already set). **NOTE:** If the correct department is not displayed and you do not see the department in the drop down menu, contact the system administrator by email at lab_safety@harvard.edu or call 6-3797 to change your user status.

3. Modify the **Inspection Scope** by selecting or deselecting the appropriate rooms/spaces that appear to the right.

4. Verify that the roster is correct. If you need to add a person to the roster, type their name in the box below **Add User To Roster** and choose their name from the resulting drop down menu. If their name does not appear, they are not a registered user. If you add their name to the roster, an auto-email will be sent to them. To remove a person from the roster, click the **X** beside their name.
Role Responsibilities and Notifications of Inspections

1. Make sure that a responsible person is correctly assigned to each role (e.g., EHS, Lab Safety Officer, Facilities) in the **Actions For:** section. You are only allowed to assign one person to each role. You will not be able to start the inspection until these responsibilities are assigned. If any person responsible for a group is assigned a corrective action during the inspection, they will receive an auto-email with links to the inspection report and their corrective actions when you complete the inspection.

2. Each person who wants to receive a Notification of Inspection auto-email after a completed inspection must be added to the roster, and the **Receive Email** box beside their name must be checked. If a person who is assigned a group responsibility wants to receive a Notification of Inspection auto-email, even if they are not assigned corrective actions for that particular inspection, they must have the **Receive Email** box next to their name checked.

**NOTE:** Persons who want to view inspection data, but do not want to receive Inspection Notification auto-emails should NOT be added to the roster.

You are now ready to start the inspection. Click on the **Start Inspection** button at the top right hand corner of the page when you are ready to begin. This will bring you to the checklist questions.
Selecting Categories

- Questions on electronic checklist grouped according to categories.
- Can only view questions one category at a time.
- Inspector can move freely between categories during inspection by using dropdown menu.

Category window displays category open on checklist.
Upon starting an inspection, the questions will not contain any data; all radio button choices and data entry fields will be blank. A data field left blank during an inspection will not appear in the report. All question data entered and saved will appear in inspection reports. Three methods for adding question data are available:

1. Radio buttons.
2. Text and numerical fields.
3. Uploading photos or other files.

Inspector Help is provided for some questions. Please read Inspector Help when available.
An inspector notes field is available for each question and **Additional Actions**. There is a window for inspector notes associated with each question. This can be used to clarify any aspect of the particular situation being evaluated. Simply select the notes window and begin typing if on a computer; if using an iPad, touch the notes window, and a keyboard will appear.

The last question in each category is designed to allow inspectors to create corrective actions during an inspection for findings that are not covered by standard questions. In order to generate a corrective action on the inspection report for these findings, you must write the corrective action statement in the inspector notes field. If the category of the corrective action is not clear, use the General Practices category.

**NOTE:** The keyboard above will appear upon selecting the text box if working on an iPad.
Uploading Photos

Each question has a Choose File button. Selecting this allows you to upload a photo or video taken with the iPad, or from a photo library. To take a picture on the iPad:

1. Select Choose File.
2. Select Take Photo or Video from the dropdown menu. The camera will open.
3. Compose the photo in landscape orientation with the iPad navigation button to the right and take the picture.
4. Select Use at the bottom of the screen. This will bring you back to the question.
5. A small thumbnail will appear next to Choose File. Select Upload on the right hand side of the page.
6. Select Save Category.
Answering Multiple Choice Questions (Radio Buttons)

Additional Corrective Actions

- To select an answer, simply click the appropriate radio button.

**NOTE:** Once a single radio button is checked, you cannot make all answers blank again unless you exit without saving the category. You are always free to change the answers among the choices, but you must save all changes to retain data.

- When you select an answer that generates a corrective action for a question, a gray box will appear.
- The corrective action will automatically be assigned to the Lab Safety Officer (or the default role assigned to the question), and will be automatically due in 30 days. These choices can be changed using the drop down menu.
- Supporting documents, files, or images can be added using the **Choose File** option.
- The **Text Box** can be used to describe the corrective action if desired.
- A green arrow will appear at the top right hand side of the question box. Clicking this will add an additional gray **Corrective Action** box, e.g., for another room.
Saving Categories

Checklist data is saved by Category, not by question. The Save Category button is located at the end of the questions list in each category. There is also a Quick Save button at the beginning of the question list to save unused categories (Quick Save should NOT be used for categories with data).

To save question data in a category, simply click Save Category. Save categories frequently so you do not lose data.

Save all categories in order to complete an inspection.

The Quick Save function allows you to quickly save categories that do not apply to a particular inspection. Simply click Quick Save, check the individual categories you want to save (or Select All), and then click Update.

Saved categories will be indicated on the Category menu. Categories must be resaved if new data is added.
This section allows you to identify and record any materials that were distributed during an inspection. This list can also serve as a reminder of what to bring with you to an inspection. To record items, simply check the items and click **Save Items**. Items can be removed by unchecking and resaving. This information will be included in the inspection reports in the **Items Provided** section.

| Item |  
|------|---|
| Biohazard stickers |  
| Cold and Warm Room Safety poster |  
| Emergency Response Guide |  
| Evacuation Maps |  
| Fact Sheet: Reusable Sharps Container Use and Removal |  
| For Lab Use Only sticker |  
| Hazardous Waste tag/sticker |  
| Incinerate Only sticker |  
| Lab Equipment Decontamination Form |  
| Laboratory Waste Guide |  
| No-eating-or-drinking decal |  
| Not for Flammable Storage sticker |  
| One-glove Policy Poster |  
| Peroxidizable Material tag/sticker |  
| Protect Our Water sticker |  
| Satellite Accumulation Area Poster |  
| Temporary container label |  

1. Choose **Items** on Tool Bar.  
2. Check items provided.  
3. Select **Save Items**.
Additional Inspection Tools: Training

This section allows you to assign required or recommended training to a lab. These requirements are displayed on the inspection reports in a designated section. Choose the appropriate training and click on Save Training.
Additional Inspection Tools: Files

This tool allows you to attach additional photos to the inspection reports. Unlike the question upload, these photos and documents will be listed in a designated section of the inspection reports called Files. Only photos can be uploaded when using the iPad. These photos may be taken with the iPad camera or selected from existing files. Both documents and photos can be added if using a computer. Uploaded documents are not available online, but will be attached to inspection reports that are exported as a PDF file.

The procedure for adding an image from the iPad is identical to that of Uploading Photos to a question.

On a computer:
1. Select Choose File and browse until you find the desired file.
2. Click on the file and select Choose at the bottom right of the window.
3. A list of files will appear below in Attached Files. Thumbnails will appear for images.
4. Click the red trashcan to delete the file, click the green pencil to edit.

Add brief description of file.

1. Select Choose File to browse.
2. Select Upload when file name appears next to Choose File.

3. A list of files will appear below in Attached Files. Thumbnails will appear for images.
Follow Up

This tool allows you to save a list of Follow-Up actions or collect other information that you do not want to include in the inspection report. Follow-up information DOES NOT appear in the inspection reports.

To add Follow-Up actions from the dropdown menu:

1. Click the arrows to open the dropdown menu and select an item on the list.
2. Click Add to add the item to the Follow-Up Action list.
3. Use text box to elaborate/ add items not on list

The inspector can access Follow-Up actions by selecting Follow Up Items under the Inspections tab of the left menu.

1. Select an item from the list.
2. Select Add.

Carcinogens; suspected carcinogens in xyz area of lab may warrant further investigation.
This tool allows the inspector to make general notes about the inspection.

These notes are in addition to the **Inspector Notes** associated with individual questions.

These notes will appear in the beginning of the inspection report.

You can edit and change notes at any time until the inspection is completed.

**On computer:** simply type notes in text box.

**On iPad:** tap in box to set cursor and open keyboard.

Save notes when finished.

**On iPad:** Type text using keyboard.

On Location

- **Settings**
- **Questions**
- **Items**
- **Training**
- **Files**
- **Follow-Up**
- **Notes**
Reviewing and Editing the Inspection

Before completing the inspection, carefully review all parts and edit as necessary (editing may be performed later at desktop computer).

Click Continue an Inspection in the Inspections tab of the left menu. This will provide you with a list of Open Inspections. Select the type of inspections. Click the green arrow to continue, or delete the inspection by clicking the red trashcan icon.

NOTE: When you continue inspection, all original answers will be retained but you must resave all categories before completion.

To make changes to the roster or group assignments:
1. After continuing desired inspection, go into inspection Settings.
2. Make desired changes to roster.
3. Click Update Inspection to save changes.

1. Go into Settings.
2. Make desired changes.
3. Click Update Inspection to save.
When all of the categories within the **Questions** section have been saved, the **Complete Inspection** button will appear in the inspection toolbar.

**Once an inspection is complete, it cannot be edited.** Auto-emails will be sent to individuals assigned corrective actions and those designated to receive reports. It is important to review data and information before completing the inspection.

When you are satisfied with the inspection report, click **Complete Inspection**. The short Inspection Report will appear on your screen. Information about the inspection report can be found in the Managing Corrective Actions user guide.
EHS Equipment Sign Out

- Total of 8 iPads available for EHS staff to use for conducting inspections.
- To sign out iPad from Cambridge campus, see Alex Gaydos at 46 Blackstone. Send inquiries regarding AIMS Equipment Sign Out from Cambridge campus to alexandra_gaydos@harvard.edu or call 6-7013.
- See Joana de Sousa in Vanderbilt Hall to sign out AIMS Equipment from Longwood campus. Send inquiries regarding equipment sign out from Longwood campus to joana_desousa@harvard.edu or call 2-1720.

1. Before borrowing an iPad, you must sign it out with Alex or Joana, providing info regarding your destination for the inspection and the prospective date it will be returned.
2. All the iPads are configured to the Harvard University Wi-Fi network. If your destination does not have access to this network, there are 4G Jetpacks that may also be signed out.
3. The corresponding label to borrowed equipment is recorded at sign out, and must be returned in the same condition, along with any other devices that were signed out (charger, iPad case, stylus, Jetpack, etc.).
4. Finally, if you are passing off equipment to another staff member for inspection use, you must inform Joana or Alex.

iPad Passcode
All EHS iPads have the same passcode. After turning on the device, a lock screen will appear with a keypad to enter a 4-digit code.
If you need this passcode, contact Alex (6-7013) or Joana (2-1720).
Connecting to 4G Jetpack

Name (SSID) and Wi-Fi password can be found by starting up the Jetpack and going to Menu → Wi-Fi Name/Password at any time.

1. Turn on your computer and Jetpack.
2. On the iPad, use the Settings app and go to Wi-Fi setting.
3. Connect to the wireless network named Verizon-291LVW-XXXX. The network name and password are labeled on the back of each corresponding Jetpack.
**NOTE:** Jetpacks are only to be signed out when the inspection destination does not have access to the Harvard University Wi-Fi network.

**Components**

<table>
<thead>
<tr>
<th>NUMBER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Red Lighting Effect - Illuminates when the display is on.</td>
</tr>
<tr>
<td>2</td>
<td>Home Screen - Provides connection and battery status, network signal strength, roaming status, and the number of users connected with Wi-Fi.</td>
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<tr>
<td>3</td>
<td>Scroll Up/Down - Scrolls up or down through available menu options.</td>
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<tr>
<td>4</td>
<td>OK Button - Press to select a menu option.</td>
</tr>
<tr>
<td>5</td>
<td>Power Button - Press and hold to turn the Jetpack on and off.</td>
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<tr>
<td>6</td>
<td>External Antenna Adapter - Connects to external antenna (not applicable).</td>
</tr>
<tr>
<td>7</td>
<td>Micro USB Port - Connects to the USB cable for charging or tethering.</td>
</tr>
</tbody>
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**Display Icons**

**Network Signal Strength**
- Indicates data is being transferred between the Verizon Wireless Network and the Jetpack.
- Indicates the number of connected devices. When available connections are filled, MAX is displayed.
- Indicates the number of unread SMS messages. If no unread messages, this icon doesn’t appear.
- Indicates the current network connection and roaming status.

**Battery Charge Indicator**
- Access to Jetpack settings.
- Access to view Data Usage.
- Battery Charge indicator.

**NOTE:** Make sure to check that the 4G Jetpack has sufficient battery life during an inspection. If needed, insert charger and plug in to outlet.
Using MyScript Application

MyScript is not directly integrated into the IMS, but you can use it to translate handwritten text to type.

1. Return to the Home screen (press center button) and select the Memo App located in the dock at the bottom of the page. You will see the following screen:

2. Make sure the compose button is selected in the toolbar.

3. Using a stylus or your finger, write the note that you want to add to the inspection.

4. Press the export button above, and click As text on the drop-down menu.

5. An Export as Text window will pop up. If you are satisfied with the text, select Copy. This will bring you back to the MyScript note page.

6. Return to the iPad home page and select the Safari app (left). This will bring you back to the inspection.

NOTE: Selecting the AIMS icon (right) will bring you to the IMS login page and you will need to select a different tab to get back to the inspection. You should not have to login again unless the session has timed out.

7. Select Paste and the text will appear in the text field. You can edit or add more text using the keyboard.