

2020  
**SAFETECH**  
*Synergy*

Elevating **QHSE** with Industry Best **Technology!**  
Presented by I T R A K

Wednesday, May 27 @ 1:00PM (MST)

# ITRAK 365 Solutions for COVID-19

*ISV Connect Premier Tier Partner*

I T R A K  
3 6 5



[www.useitrak.com](http://www.useitrak.com)



# Housekeeping Items

- Please mute yourselves
- If there aren't a lot of people, we'll take questions openly throughout the presentation
- Otherwise, feel free to ask question in the Chat panel or click the 'Raise hand' icon
- You can also join our Microsoft Teams Conference Channel and continue the conversation there
  - Instructions: <https://itrak365.com/conference-schedule/>
- If you have question after the conference, see above or you can just email them to us via [support@neosystems.com](mailto:support@neosystems.com)
- We can provide copies of the video and any presentation materials, just ask
- Check out our YouTube page as well <https://bit.ly/3gfTku4>

# INTRODUCTIONS



Darren Houston  
**Solutions Architect**



Michelle Bryan  
**QHSE Specialist**



Kassem Elrafih  
**Data & Reporting Specialist**

# Objectives

**Show you the process flows we've been extending in ITRAK 365 relative to COVID-19 and get your feedback in this rapidly changing environment.**

- Today we'll cover:
  - Overview of ITRAK 365 Process flows with regards to COVID-19
  - Explanation of free public offering
  - Demo walkthrough including Power BI
  - Q & A

# ITRAK 365 Solutions for COVID-19

## Overview

*Provide a suite of processes flows for to help organizations track and manage their internal COVID-19 responses.*

## Objectives

1. Providing employees standardized **process to report** on COVID-19 activities
2. Give employees tools to help keep **safety** and **wellness** top of mind
3. Providing employers with a **centralize visibility of COVID-19 related activities and actions**
4. **Identify areas of risk** related to employees and overall business continuity
5. **Share best-practice** approaches for handling COVID-19 across companies

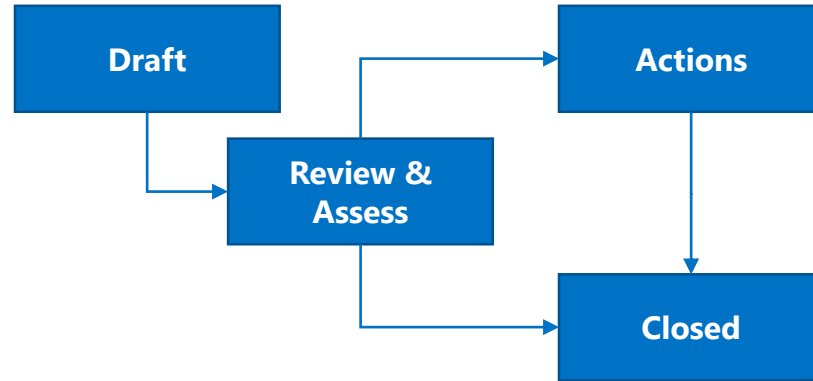
# Publicly Accessible Offering

- **The environment for COVID-19 will be available as separate ITRAK 365 AppSource offering**
  - 2 hour test drives
  - Documentation for processes
- **Shared Multi-Tenant Environment COVID-19 Free Offering**
  - Allows customers to enter up to 1000 forms per month
  - Each company gets unique login with process flows and Power BI reporting of their data
  - Each company has complete control over the data, can download at anytime
  - Each company has three access points:
    - ITRAK 365 Portal – manage submitted forms, advance processes, manage actions and download data
    - ITRAK 365 Mobile App – enter safety and compliance forms from iOS and Android
    - ITRAK Power BI Reporting dashboard – see consolidated statistics of reporting environment
  - Company receives two logins:
    - One company account for accessing Portal
    - One Mobile App login for sharing with unlimited mobile users
    - Power BI is accessible using their own AD Authentication
- Support via specific [covid19@neosystems.com](mailto:covid19@neosystems.com)
- Continuous Improvement with community input & best practices

Free to partners  
who want to host in  
their geography  
(and we provide  
HSE support for \$)

# ITRAK 365 Solutions for COVID-19

- 15 Process Flows
- Provided from 3 perspectives:
  - Company / HSE
  - Home Worker
  - Field Worker
- Available for your ITRAK environments (n/c)
- Simple workflow notifications
- Power BI Dashboard
- Version 1 – expect more revisions



The screenshot shows a web interface for a COVID-19 self-assessment form. At the top, there are navigation controls: '+ ADD', 'VIEW', 'EXPAND', and 'COLLAPSE'. Below these, the form is organized into sections: 'Workplace Inspections', 'COVID - 19', 'COVID - 19 Self Assessment', 'COVID Business Continuity Plan', and 'Daily Check In'. Under 'Daily Check In', there are four checkboxes with corresponding instructions: 'Cleared For work', 'Isolate' (which is checked), 'Working from Home', and 'Quarantine (self-isolate)'. At the bottom, there is a '+ New Form' button.

# Process Flow

Process	Audience	Frequency	Purpose
COVID-19 Business Continuity Plan	Company HSE/ Management	Monthly	Checklist for business impacts and actions that an organization should implement for pandemics or epidemics
COVID-19 Operational Impact Assessment (WIP)	Company HSE/ Management	As needed	Process and inspection for determining operational impact with regards to worker illnesses
COVID-19 Cleaning Checklist	Field Workers	As needed	Checklist to help with the proper cleaning and disinfecting of the worksite
Disinfectant Practices Audit	Field Workers	As needed	Ensuring review and approval of disinfectants and their intended application
COVID-19 Pre-Work Assessment and Monitoring	Field Workers	Every Day	Daily worker assessment to be completed before being allowed to go into work
Daily Interaction Log	Field Workers	Every Day	Recording who and where workers have physically interacted with for tracing purposes



# Process Flow - Continued

Process	Audience	Frequency	Purpose
Daily Check In	Home Worker	Every Day	Monitoring location, health and wellness of remote employees
Weekly Personal Workspace Inspection	Home Worker	Weekly	Inspection to help verify the home workspace is adequate
Alternate Work Location Request	Home Worker	As needed	Approval request for remote work (or another location)
Travel Request	Field Workers	As needed	Approval request for company travel
Daily Safety Meeting	Company HSE/ Field Workers	Every Day	Daily Safety Meeting with an Emergency Response section
Incident Report	Any Worker	As needed	Reporting an incident (Injury, Exposure, COVID-19)
Quick Action	Any Worker	As needed	Allows any worker to submit an action
Support Request	Any Worker	As needed	Allows any worker to request support (technical, feedback, changes, etc.)

# COVID-19 Company Compliance Process Flows

## COVID-19 Company Compliance Process Flows

COVID-19 Business Continuity Plan

COVID-19 Operational Impact Assessment (WIP)

COVID-19 Cleaning Checklist

- ☐ **Frequently touched surfaces** - Tables, doorknobs, light switches, handles, desks, toilets, faucets, sinks, and electronics
- ☐ **Lunchroom**
- ☐ **Training or Boardrooms**
- ☐ **Washcars/Porta potties** - Outside washroom facilities
- ☐ **Security shack**
- ☐ **Office washrooms**
- ☒ **New Form**


Disinfectant Practices Audit

# COVID-19 Essential and Mobile Worker Process Flows

## COVID-19 Essential and Mobile Worker Process Flows

### COVID-19 Pre-Work Assessment and Monitoring

This form must be completed prior to coming on shift to help determine if you are safe to return to work. You can complete this assessment for yourself or on behalf of someone else, if they are not able.

- ☐ **Cleared for Work** - Cleared to be on project site for secondary screening medic
- ☐ **Presumed** - Exhibiting symptoms of COVID (Fever, cough, shortness of breath)
- ☐ **Exposure** - Recent international Travel history, interaction with presumed and/or Confirmed cases of COVID-19
- ☐ **Confirmed** - Tested Positive for COVID-19
- ☐ **Recovered COVID Case** - Cleared by Medical Professional to return to work
- ☐  New Form

### Daily Interaction Log

# COVID-19 Employee Process Flows

## COVID-19 Employee Process Flows

### Daily Check In

- ☐ **Cleared For work** - Have completed self-Assessment and passed secondary Screening. (essential work only)
- ☐ **Isolate** - been diagnosed with COVID-19, or are waiting for laboratory test results for COVID-19, or mild symptoms
- ☐ **Working from Home**
- ☐ **Quarantine (self-isolate)** - if you have no symptoms but had potential exposure (travelling, contact)
- ☒ **New Form**

### Weekly Personal Workspace Inspection

### Alternate Work Location Request

### Travel Request

# Example: COVID-19 Business Continuity Plan

## COVID-19 Business Continuity Plan

ITRAK Support

Form 1065

Draft

Review

Implement Actions

Closed

Submit

Save

### General Information

The Coronavirus pandemic can impact the day to day operations of your business. The more prepared the business is the higher the probability the business will survive the pandemic crisis created by COVID-19. These actions can be tied into your business continuity plan with the potential impacts of this virus.

Reported Date \*

07-Apr-2020 03:26 PM

Entered By \*

Support, ITRAK

Area/Facility

Location

### Coronavirus Preparedness Checklist

Progress

Impact on the business from Coronavirus

☐ Confirm who in the business should have responsibility to prepare for a pandemic / infectious illness.

☐ Confirm critical workers and if they were to fall ill what the impact would be on the business and who can substitute for them.

### Progress

#### 1 Impact on the business from Coronavirus

Confirm who in the business should have responsibility to prepare the company in the event of a pandemic / infectious illness.

Done

In Progress

Not Started

N/A



Confirm critical workers and if they were to fall ill what the impact will be on the business and who can substitute for them.

Done

In Progress

Not Started

N/A



Issue communication to all workforce including subcontractors on what actions are needed.

Done

In Progress

Not Started

N/A



Will loss of workers have an impact on delivery of services to client – if yes, advise client.

Done

In Progress

Not Started

N/A



Determine the potential impact a pandemic/ infectious illness will have on company finances using multiple possible scenarios that affect delivery of services.

Done

In Progress

Not Started

N/A



Confirm what the impact of the pandemic can have on business-related domestic and international travel for the business (e.g. quarantines, flight cancellation, missed client meetings).

Done

In Progress

Not Started

N/A



Source up-to-date information on the potential infection from government health organizations and the World Health Organisation. Ensure policies being applied utilize the most up-to-date information.

Done

In Progress

Not Started

N/A



Contact all key contacts in the business and advise

Close

Larger Text

# Example: COVID-19 Pre-Work Assessment and Monitoring

COVID-19 Pre-Work Assessment and Monitoring



ITRAK Support



Form 1066

Draft

Review

Implement Actions

Closed

Submit

Save

## General Information

Reported Date \*

07-Apr-2020 03:30 PM



Entered By \*

Support, ITRAK

Supervisor/Manager \*

COVID Classifications \*

Cleared for Work

Area/Facility

Location

Do you want to review instructions?



## COVID 19 Screening Questionnaire

Before you start - Keep in mind. A self- Assessment result is not a diagnosis; it is a use this self-assessment tool for emergencies. For all medical emergencies, please

Survey \*

## Survey



Have you Traveled outside of Canada in the past 14 days

Yes

No

In the last 14 days have you been in contact with person(s) who has travelled outside of Canada?

Yes

No

In the last 14 days have you been in contact with person(s) who has/is suspected of having COVID-19

Yes

No

Within the last 14 days, do you believe that you have been infected with the COVID-19 Virus?

Yes

No

Do you have a cough?

Yes

No

Do you have a runny nose?

Yes

No

Do you have a fever >100.4F/38C)

Yes

No

Are you experiencing Shortness of Breath?

Yes

No

Tested Positive for COVID

Calculation Result: 10



Save & Close

# Example: Daily Interaction Log

## Daily Interaction Log



Form 1062

Draft

Closed

Submit

Save

### General Information

Reported Date \*

07-Apr-2020 12:02 PM

Entered By \*

Houston, Darren

Supervisor/Manager \*

Smith, John

### Movements and Contacts

Employees you have physically interacted with today

<div>Export to Excel</div> <div>Export to PDF</div>	
Name ↑	Role
Borhot, Melik	
Bryan, Michelle	
Doe, John	
Elrafih, Kassem	
Fritz, Diane	
Houston, Darren	

Select Edit

Other people you have physically interacted with today

<div>Export to Excel</div> <div>Export to PDF</div>				
Name ↑	Company	Email	Phone	Comments

+ Person

Other areas/facilities visited today

# Example: Daily Check In

## Daily Check In

ITRAK Support

New

Draft

Closed

Submit

Save

### Quarantine (self-isolate)

Start Date of Quarantine

07-Apr-2020

Quarantine for 14 days if you have no symptoms and you:

Are returning from travel outside of Canada had close contact with someone who has or is suspected to have COVID-19 have been told by the public health authority that you may have been exposed and need to quarantine Quarantine means that for 14 days you need to: stay at home and monitor yourself for symptoms, even if mild avoid contact with others to help prevent transmission of the virus at the earliest stage of illness practise physical (social) distancing in your home and community If you develop symptoms, even if mild, stay home and isolate yourself from others. Immediately call a health care professional or your public health authority.

### Physical (social) distancing

Social Distancing

Together, we can slow the spread of COVID-19 by making a conscious effort to keep a physical distance between each other. Physical (social) distancing is proven to be one of the most effective ways to reduce the spread of illness during an outbreak. This means making changes in your everyday routines to minimize close contact with others, including: avoiding crowded places and non-essential gatherings avoiding common greetings, such as handshakes limiting contact with people at higher risk like older adults and those in poor health keeping a distance of at least 2 arms-length (approximately 2 metres) from others

### Hygiene

Proper hygiene can help reduce the risk of infection or spreading infection to others:

wash your hands often with soap and water for at least 20 seconds, especially after using the washroom and when preparing food use alcohol-based hand sanitizer if soap and water are not available when coughing or sneezing: cough or sneeze into a tissue or the bend of your arm, not your hand dispose of any tissues you have used as soon as possible in a lined waste basket and wash your hands afterwards avoid touching your eyes, nose, or mouth with unwashed hands

### Cleaning

Coronaviruses are one of the easiest types of viruses to kill with the appropriate disinfectant product when used according to the label directions. Health Canada has published a list of hard surface disinfectants that are likely to be effective for use against COVID-19.

Although they do not claim to kill COVID-19, cleaners can play a role in limiting the transfer of microorganisms. Health Canada recommends cleaning high-touch surfaces often, using either regular household cleaners or diluted bleach. This bleach solution should be prepared according to the instructions on the label or in a ratio of 1 teaspoon (5 mL) per cup (250 mL). Directions are based on bleach that is 5% sodium hypochlorite, to give a 0.1% sodium hypochlorite solution.

### Employee Signoff

\* Required



# Monitoring Status of Field Workers

ITRAK  
365

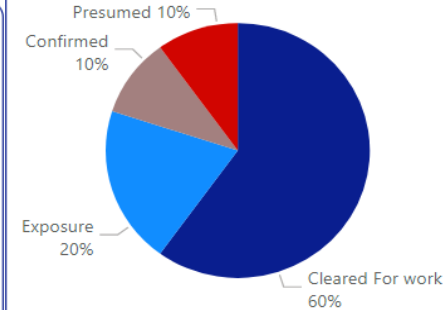
SAFETY & COMPLIANCE SOFTWARE

09/04/2020

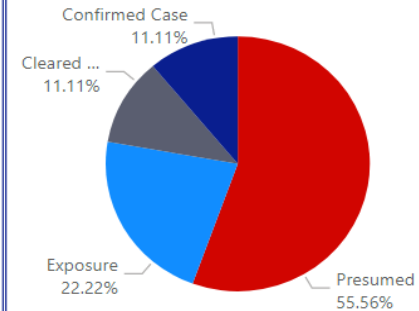
31/05/2020

Entered By	Classification Name	Reported Date	Form Link	Supervisor Name	Assessment Answer	Color
Thomas, Jennifer	Confirmed	31/05/2020 2:48:00 PM	<a href="#">🔗</a>	Thomas, Jennifer	Confirmed Case	Red
Anderson, Elizabeth	Exposure	22/05/2020 2:27:00 PM	<a href="#">🔗</a>	Martinez, Thomas	Exposure	Yellow
Safety, Fire and Flame	Cleared For work	20/05/2020 2:13:00 PM	<a href="#">🔗</a>	Garcia, David	Presumed	Orange
Safety, Fire and Flame	Cleared For work	20/05/2020 1:35:00 PM	<a href="#">🔗</a>	Martinez, Thomas	Presumed	Orange
Anderson, Elizabeth	Cleared For work	19/05/2020 2:30:00 PM	<a href="#">🔗</a>	Thomas, Jennifer	Exposure	Yellow
Thomas, Jennifer	Cleared For work	19/05/2020 2:18:00 PM	<a href="#">🔗</a>	Davis, Charles	Cleared For Work	Green
Wilson, Barbara	Presumed	24/04/2020 11:56:00 AM	<a href="#">🔗</a>	Davis, Charles	Presumed	Orange
Wilson, Barbara	Exposure	22/04/2020 11:46:00 AM	<a href="#">🔗</a>	Davis, Charles	Presumed	Orange
Lopez, Patricia	Cleared For work	09/04/2020 11:59:00 AM	<a href="#">🔗</a>	Davis, Charles	Presumed	Orange

## Classification Type



## Assessment Answer



## Employee ...

Search

- ☐ Anderson, Elizabeth
- ☐ Davis, Charles
- ☐ Lopez, Patricia
- ☐ Safety, Fire and Fl...
- ☐ Thomas, Jennifer
- ☐ Wilson, Barbara

# Contact and Location Tracing of Field Workers

ITRAK  
365  
SAFETY & COMPLIANCE SOFTWARE

06/04/202020/05/2020

Employee Name

Search

☐ Anderson, Elizabeth

☐ Lopez, Patricia

☐ Safety, Fire and Flame

Employee Interaction Heat Map

Barbara  
David  
Jennifer  
PatriciaCharles  
Elizabeth

Non - Employee Interaction Heat Map

Trica  
Joe  
Delivery  
Mike Dave  
Hank

Employee Name

Processess Submitted

Anderson, Elizabeth

1

Lopez, Patricia

4

Safety, Fire and Flame

3

Entered By	Reported Date	Supervisor Name	Did you have any concerns/comments/suggestions about COVID exposure today?	Status	Form Link
Safety, Fire and Flame	19/05/2020 4:40:00 PM			Draft	<a href="#">🔗</a>
Anderson, Elizabeth	20/04/2020 4:33:00 PM	Thomas, Jennifer	Nothing COVID related happened	Closed	<a href="#">🔗</a>
Lopez, Patricia	06/04/2020 11:41:00 AM	Safety, Fire and Flame	None	Closed	<a href="#">🔗</a>
Lopez, Patricia	07/04/2020 11:46:00 AM	Safety, Fire and Flame	None. Didn't leave the house	Closed	<a href="#">🔗</a>
Lopez, Patricia	08/04/2020 11:47:00 AM	Safety, Fire and Flame		Closed	<a href="#">🔗</a>
Lopez, Patricia	09/04/2020 11:48:00 AM	Safety, Fire and Flame	Minor. Quick meeting with co-workers	Closed	<a href="#">🔗</a>
Safety, Fire and Flame	20/05/2020 1:41:00 PM	Mobile, Fire and Flame	No	Closed	<a href="#">🔗</a>
Safety, Fire and Flame	20/05/2020 2:17:00 PM	Lopez, Patricia		Closed	<a href="#">🔗</a>

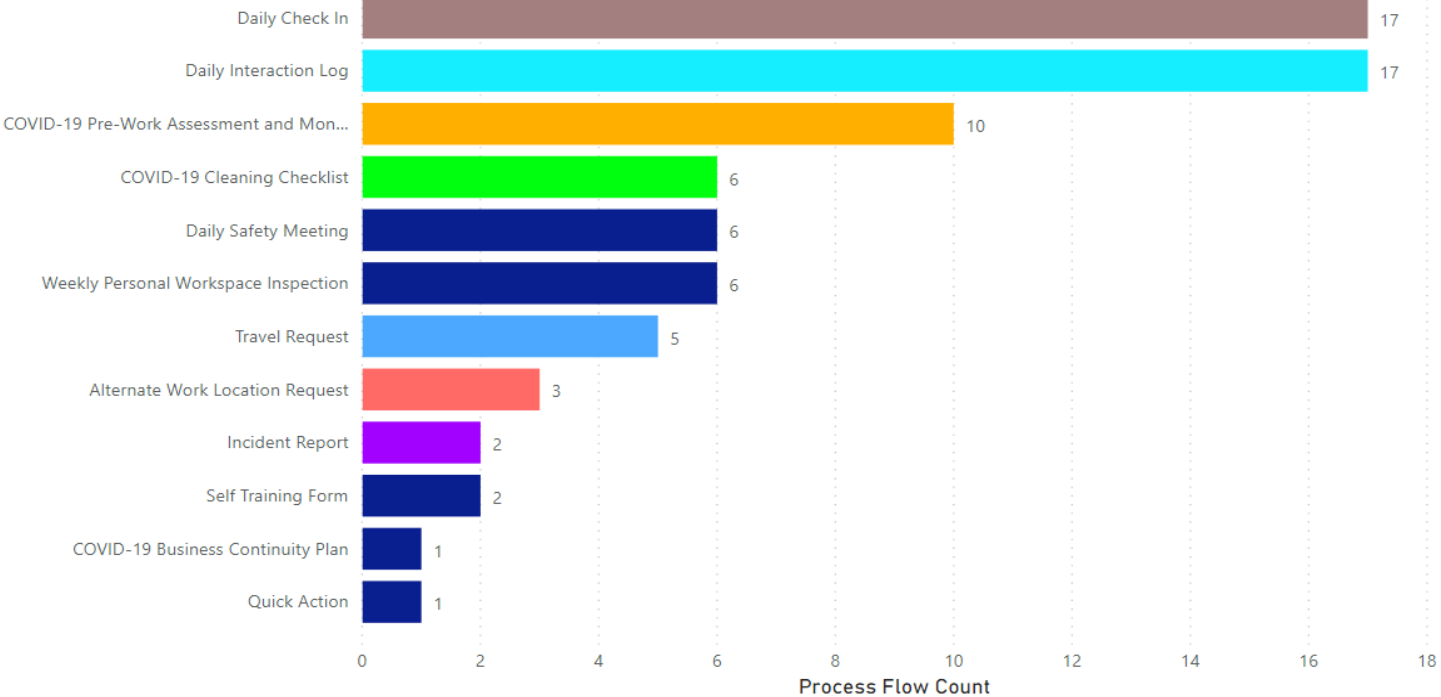
# Monitoring Program Participation

ITRAK  
365

SAFETY & COMPLIANCE SOFTWARE

- Process Flow Name
- COVID-19 Employee Process Flows
  - COVID-19 Company Compliance Process
  - COVID-19 Essential and Mobile Worker Pr
  - Standard HSE Process Flows
  - CLICK HERE TO LEARN ABOUT PROCESS F
  - Support

## Participation



Reported Date

01/04/2020 31/05/2020

89%  
Participation Rate

1  
# of Employees who  
have not Participated

Employee Name	Participation Outcome
Mobile, Fire and Flame	Did not participate

# SAFETECH Synergy Schedule! Upcoming Sessions!

- <https://neosystems.com/conference-schedule/>





2020

# SAFETECH *Synergy*

Elevating **QHSE** with Industry Best **Technology**  
Presented by I T R ^ K



I T R ^ K  
3 6 5



AVAILABLE ON  
Microsoft AppSource

Follow us on:

