

M+A Partners - Pre-site visit checklist during COVID-19

Name:	Client:
Date:	

During the COVID 19 pandemic M+A Partners guidance recommends face to face visits and meetings are kept to a minimum and should only take place when essential and once all other options have been considered. Any visits should be based on managing the risks to the person/s involved. This checklist should be considered as an addition to national guidance. It does not take the place of the Firm's safety protocols unless explicitly agreed with your line manager.

Is the visit essential?	Yes (Comments)	No (Comments)
Is there a legal/statutory requirement?		

What is the purpose of the visit?	
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What other ways of assessing/meeting with the client have been considered?	Other ways to carry out assessment/meeting - (Comments)	Why they have been ruled out
<i>Consider: Skype/Teams, Telephone etc.</i>		

Risk Assessment - Before the visit - HAVE YOU:

HAVE YOU	Yes (Comments)	No (Comments)	Don't Know
Contacted the client directly?			
Obtained a copy of the client's Risk Assessment?			
Checked who will be present during the visit?			
Identified any environmental risks at the client's location?			
Identified the health status of any individuals where the visit is taking place?			

Does anyone have COVID-19 symptoms?			
Explained requirements for social distancing and			

that they will be observed?			
Confirmed the availability of hand washing facilities?			
Made the client aware you may be wearing PPE which covers your face and hands?			
Discussed this with your line manager?			

Preparing for the visit (risk planning) HAVE YOU:

HAVE YOU	Yes (Comments)	No (Comments)
Notified your line manager of the time, location of the client and your contact details?		
Confirmed with the client any documentation you may need to access?		
Considered if the visit requires a colleague to attend with you? If so, that you can both travel independently?		
Confirmed you will be able to maintain 2 metres physical distance throughout the visit?		
Identified what PPE you will need throughout the visit?		
Got/can you get appropriate PPE?		
Confirmed your risk plan with your line manager?		

Further Guidance
<p>For your own safety:</p> <ul style="list-style-type: none"> • Wash your hands before and after the visit as soon as possible; • Touch minimal surfaces; • Retain 2 metres social distancing; • Do not use client stationary – Take and use your own; • Do not use client catering facilities – Take your own food and drinks; and • If in doubt contact your line manager and seek advice.



I confirm that I have carried out a pre-site visit review and am happy that all necessary actions have been undertaken by myself (representing M+A Partners) and the client to address and mitigate the associated risks:

Name:	Signature:	Date:
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Line Manager sign-off

Name:	Signature:	Date:
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