

**Working Out of Office Risk Assessment:
Customer Home Visits/Customer Site Visits**

The following form is split into two sections.

1. The first section 'When booking the meeting' needs to be completed by the person arranging the meeting with the customer.
2. Prior to the PM or CS attending the site/meeting they are to complete the 'To be completed prior to attending visit' section of the form.

This form requires the signature and date of those attending and of their manager.

When booking the meeting

Claim Number	
Customer name	
Staff members (s) making the appointment	
Purpose of visit (Visit deemed necessary Alternatives? Nature of visit sensitive/likely to trigger negative response?)	Visit Deemed Necessary: Y / N
Date and time of visit	
Anticipated length of visit	
Parties attending (Including Arrow, SR and Customer Could they pose a risk?)	
Visit location (Etc)	Has this location been visited/assessed previously? Y/N Are there any potential risks? Y/N Dogs at the address? Y/N Is this a redzone property? Y/N
Second member of staff to accompany (if any risks identified a second person should attend the meeting)	

To be completed prior to attending visit

Estimated time of arrival	
Estimated time of return	
Method of travel	
Safety equipment required	mobile phone Y / N site safety equipment. Y / N any additional equipment?



First contact with customer or family members?	Y / N (If yes please specify additional colleague attending)
Previous concerns with customer?	Y / N (If yes please specify)
Check in method agreed <i>Who and how are you going to make contact once the meeting has been completed.</i>	Name of Contact for Check in Phone / email / in person Manager/ colleague
Contact phone	Contact Number Y/N Credit Checked Y/N Battery Checked Y/N
Risks assessed for visit	
Steps taken to address risks	
Staff member/s sufficiently experienced?	
Any additional support required?	

SIGNED.....STAFF MEMBER DATE.....

AUTHORISED.....MANAGER DATE.....

Have you considered:

- Unpredictable customer or friend/family behavior
- History of customer
- Daylight hours
- Safety of the area
- Dogs at the property
- Safety equipment
- Is staff member fit and well
- Level of staff member experience/training
- weapons
- Owner attending
- Tenants
- Drugs/alcohol
- Poverty/Abuse
- Unattended minors
- Gut feeling

Red zone property:

- Squatters
- Lighting
- Isolation

Guidance for Completion of Working Out of the Office Risk Assessment

1. Identify Hazards

Consider:

The nature of the meeting;

The nature and history of behaviour of the customer and any other individual who may be present at the location or meeting;

The environment and location of the visit;

Any previous meetings or incidents;

The experience and views of the staff member.

2. Evaluate the risks and any potential precautions

Consider:

Whether the risks can be eliminated;

Any existing precautions, whether they are adequate or whether more needs to be done (personal alarm, mobile phone, tracking system, accompanied visit);

Whether the risks are low or acceptable;

Does the member of staff have particular training or experience which will reduce the risks (such as situational awareness or defusing/de-escalation training)?

Is the risk assessment completed and information sufficient to address non-return of the staff member?

3. Record all findings of assessment

Record:

All information requested on Risk Assessment Form and any additional information which has arisen during assessment.

4. Communicate all relevant information to employee(s)

Ensure the outcome of the risk assessment is fully communicated to and understood by relevant employees. Consider use of the caution flag to alert other staff members to any risk or concern.

Considerations for Employees

1. Do you know the customer/their family? If not are you able to access information from other staff or services?

Predicting an individual's behaviour is more accurate when the individual is well known to you or when you have maximum information available to facilitate your judgment.

2. Is there any history of violence, abuse or harassment from the customer or their family?

Past behaviour is an effective predictor of future behavior. Visiting alone following any violence or threat must not be permitted.

3. Is the location of the visit a safe area?

Is there poor lighting, high crime rate, gangs, vandalism? Consider daylight hours when scheduling appointments.

4. What is your gut feeling?

Gut feelings or intuition while difficult to communicate should not be ignored.