Scope

These guidelines apply to all VEIC staff conducting site visits, regardless of the state they are working in or the contract they are representing.
VEIC support needed to enable Site Visits

- Masks, gloves, hand sanitizer, wipes
- Training on what the site visit guidelines are and how to implement them
- Training on how to use PPE
- Getting DocuSign up and running for ECs and AMs to use for Incentive Agreements
- Checklist for field staff to use
- Laminated materials to take out to sites and show customers
- Guidelines posted on EEU websites to share with customers
- Marketing campaign to explain VEIC safety plan to public
Requirements for Site Visits to begin

- All of the above VEIC support is acquired and / or completed
- Site work is expressly allowed by each state where we work
  - This will be captured in the tracking document established by SLT
- Customers have indicated they are READY to meet with us
  - This will be established per an email indicating they want us on site
Steps to take before a site visit
As early as possible

**Required**

- Talk to your supervisor to confirm that you need the site visit and cannot perform the work remotely.
- Determine whether one (1) or two (2) people are needed on site.
  - 1 person is preferred on a site visit, unless you need 2 for safety reasons or to perform the work.
  - No more than 2 staff are allowed on a site visit.
- Ask for a copy of the customer’s policy for having external parties on site; review it to ensure we can comply with all requirements
  - If the customer’s policy is different from the VEIC Site Visit Guidelines, staff are required to follow whichever one is more stringent.
- Determine what equipment you will need to conduct the site visit
  - If you need to check out any equipment from VEIC’s Vermont office (e.g., metering equipment or blower door), contact Sharon Bay or Brent McGlynn.

**Preferred**

- If an in-unit inspection is required, select vacant units or unoccupied sites first.
- If you will be doing more than one (1) site visit per day:
  - Take extra care to sanitize your hands in between visits and use a new face mask when interacting with each customer.
A few days beforehand

- Ensure that all site visit details are in your Outlook calendar to enable contact tracing, including:
  - Physical address
  - Name of contact, and
  - Names of any people you expect to meet with at the site
One (1) day beforehand

**Required**

- Ask if anyone on site has been ill or diagnosed with COVID-19.
  - If yes, postpone the visit.
  - If no, the visit can proceed.
- Let them know what to expect from you and send them a link to EEU website with the site visit guidelines.
- Gather your PPE.
- Gather all materials and documents you will need.
  - If more than one employee will attend, each person must have a complete set of their own materials, including PPE, hard hat, clipboard, pens, etc.
- Gather all materials for the customer
  - VEIC’s preference is to distribute materials electronically or bring laminated materials to show the customer to minimize distribution of leave-behind papers.
  - If rack cards, brochures, or handouts need to be distributed, put the needed amount in a box or bag and advise your contact to let the materials sit for several days before handling them.

**Preferred**

- Ask your contact at the site to identify one person for you to meet with, so that as few people as possible are interacting.
- Ask your contact at the site if there is a location you can meet that has little-to-no foot traffic or other people nearby.
Steps to take the day of a site visit
In the morning

• Confirm that you can safely do the site visit.
  • If you are showing any signs of illness, cancel the site visit.
  • Complete the daily health questionnaire the morning of the visit, per HR guidelines.
    • If your temperature is elevated, cancel the site visit.
• Bring your VEIC Checklist / review VEIC Guidelines for site visits.
• If you observe conditions that you believe are unsafe at the site, you may choose not to conduct the visit.
Traveling to / from site visits

VEIC’s preferred method of travel for site visits is a personal vehicle, a company car, or biking/walking if possible. Ride sharing and public transit should only be used if no other viable options exist, and require Division Leader notification.

**Vehicle**
- Limited to one (1) employee per vehicle.
- Use of a personal vehicle is preferred.
- When using company car or rental car, wipe down the steering wheel, dashboard, and other heavily used surfaces before and after using the vehicle.

**Ride Hailing Services**
- The use of a face mask is required.
- Minimize contact with driver and vehicle. Staff should assume vehicle was not cleaned after previous passenger.

**Public Transit**
- The use of a face mask is required.
- Strive for a contactless journey (e.g., use SMART Card to scan entry / exit.)
- Travel during non-peak times.
- Once at the field site, staff should replace their face mask to minimize contamination.
At the site

**Before entering site**
- Sanitize hands
- Put on face mask
- Use nitrile gloves, if desired.

**While onsite**
- Do not shake hands.
- Wear a face mask at all times.
- Attempt to maintain 6 feet of distance from others, recognizing this may not be possible in all settings, like retail.
- Maintain good hygiene; sneeze or cough into elbows, not into the air.
- Provide leave-behind information electronically, if possible.
- Use DocuSign to obtain signatures electronically rather than having customers or contractors sign hard copies of forms.
- Record names of other people at the site.

**When leaving site**
- Sanitize hands
- Sanitize tools and equipment brought on site to prepare it for the next use.
- If driving alone, staff may remove face mask once inside vehicle.
Steps to take after a site visit
After a site visit

• Update Outlook calendar with the names of all people you interacted with on site, as well as with anyone you interacted with traveling to or from the site, to enable future contact tracing as needed.
• Document your site visit in Tracker.
• Send follow-up documentation to site contact(s)—including links to or attachments of materials you reviewed together—within 2 business days.
• Share positive experiences and intel gathered with colleagues, as appropriate.
Thank You