Conduct of Visit Responsibilities

Stage	Officer Responsibilities	Tenant Responsibilities
Pre-visit arrangements	Ensure customer has received appropriate notice of appointment where necessary. Be aware of any reasonable adjustments. Check any sensitive markers on the system. Ensure checks for involvement from other teams – is it worth doing a joint visit? If not, ensure you are familiar with the involvement to advise the customer accordingly. Be prepared with any required paperwork.	Be mindful of cancelling appointments with 24hr notice. Speak to a member of staff if you are feeling unsure of what to expect at the appointment. Ensure appropriate support is in attendance at the visit if required.
Arrival and Identity	Arrive on time with official ID. Introduce yourself and job role. Ask to ensure you are speaking with the tenant or intended occupant. Consider and use appropriate PPE where necessary, such as shoe covers or other protective items required for the visit. Be respectful and polite.	Be available at agreed time and allow access. Provide ID if requested. Do not smoke or vape during visit. Secure any animals / pets. Be respectful and polite.
Introduction	Discuss nature of visit and expected duration. If requiring access to all rooms, discuss expectation of moving animals/pets as required.	Listen, engage, and ask questions if unclear.
Tenancy Review	Discuss rent, update tenancy profile and any household changes. Complete fire safety check. Offer advice.	If required have the requested documentation available. Share accurate information about yourself, your household, finances and repairs.

Stage	Officer Responsibilities	Tenant Responsibilities
Property Inspection	Check condition, identify any breaches or health and safety matters (smoke alarms, hazards). Discuss any retrospective permissions. Record findings and report any outstanding repairs.	Allow access to all rooms. Ensure all areas, including garden spaces, are safe and clear for Officers to access.
During any works on Site	Explain the works being completed, expected duration and any areas that will need to be accessed. Ensure the work area is left safe, tidy and secure during and after the visit. Keep the tenant informed of any changes, delays or further appointments required. Leave any relevant paperwork with the tenant where applicable.	Allow safe access to the agreed work area and any required services, such as water, gas or electricity where needed. Keep children, pets and personal belongings away from the work area. Follow any safety advice provided by staff or contractors while works are being carried out.
Support and Advice	Identify needs and signpost to other services as required. Report any concerns and discuss as necessary.	Discuss support requirements and consider offered support and referrals.
Closing and Next Steps	Summarise findings. Agree actions, timescales and any further visits required. Complete visit record and confirm in writing.	Agree to follow up actions within specified timescales. Ask for clarification if needed. Contact Rykneld if unable to achieve the required actions to discuss alternative resolutions.
Failed Access	Post a no access calling card where no access is gained. If breaches identified, type up notes and confirm to customer in writing.	Contact Rykneld Homes to discuss and rearrange appointment.