



SOP 30: Workplace Visitors

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IT IS THE RESPONSIBILITY OF ALL USERS OF THIS SOP TO ENSURE THAT THE CORRECT VERSION IS BEING USED

All staff should regularly check the Research & Innovation Webpage for information relating to the implementation of new or revised versions. Staff must ensure that they are adequately trained in the new procedure and must make sure that all copies of superseded version are promptly withdrawn from use unless notified otherwise by the SOP Controller.

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<http://www.gloshospitals.nhs.uk/en/About-Us/Research--Development/>

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Version History Log

This area will be updated with details of all changes made to the SOP whether due for full review or not.

Version	Details of Change	Date Implemented
1.0		

This SOP will be reviewed every two years unless changes to any relevant legislation require otherwise

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Glossary

EPR	Electronic Patient Record
GHNHSFT	Gloucestershire Hospitals NHS Foundation Trust
GMS	Gloucestershire Managed Services
ID	Identification
R&I	Research & Innovation

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1. Introduction, Background and Purpose

This policy outlines the rules and guidelines that apply to all visitors coming into the R&I department and to the colleagues welcoming them and hosting their visit. This policy provides an explanation of the requirements for ensuring that site visitors are protected during their visit in relation to health and safety and welfare.

2. Who should use this SOP?

GHNHSFT R&I Team will follow this SOP for all Workplace Visitors.

3. When this SOP should be Used

The implementation of this policy applies to all R&I staff when a Workplace Visitor is coming on site. A Workplace Visitor may refer to a contractor, an external vendor or maintenance person, a research monitor, an external stakeholder, a research sponsor or funder, an apprentice or intern, a student, an employee family member, or member of the public.

This policy does not include patients, or GHNHSFT/GMS employees, as Workplace Visitors.

4. Policy elements

The following rules apply for all workplace visitors:

- Permission for pre-planned visitors should have been requested from the R&I Manager, Research Matron or Delivery Team Lead to visit the workplace prior to their visit see appendix 2 and 3 for email templates).
- All visitors, whether pre-planned or spontaneous, should sign in, as applicable, on arrival at reception/foyer or research office and show some form of photo identification.
- Visitors should wear their ID badge, if applicable, or be given a *Visitor lanyard* / badge, to be dated and returned at the end of the day/visit.
- All visitors must sign out and be escorted from the premises.

- Visitors that require permission to access confidential information must have the relevant permission.
- Visitors will be welcomed by an R&I department employee and shown to their work place location.
- Visitors will be informed of the relevant emergency procedures by the employee.
- Visitors will be informed of the relevant refreshment facilities and washrooms.
- Visitors should not be given access codes or security passes.
- Visitors that are provided with any equipment for their visit must sign the *Visitor Equipment log*, and complete a Monitor Access log for EPR access
- Visitors must return any equipment provided to them during their visit to the R&I team.
- Visits can only take place during normal working hours.

5. References

Implementation of this policy is in conjunction with Trust Security Policy B0135

[B0135 \(sharepoint.com\)](https://sharepoint.com)

Appendix 1: Planned Workplace Visitor Flowchart



Appendix 2: Planned Visitor Request Email Template

To: R&I Professional Services Manager / Research Matron/s / Delivery Team Research Lead

Cc: *Team members (as applicable)*

Subject: Request for workplace visitor – [*location*]

Dear xxxx,

Study Title: (*if applicable*)

IRAS:

Please see below details of requested visit by an external visitor

Purpose of visit:

Date:

Timings:

Location of visit:

Equipment required:

EPR Access required: No/Yes (*if yes, please detail whether EPR Access Agreement is in place*)

Please review these details and confirm if you are happy for this visit to proceed.

If you have any questions, please do not hesitate to contact me.

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Appendix 3: Planned Visit Confirmation Email Template

To: Visitor

Cc: R&I Professional Services Manager / Research Matron/s / Delivery Team Research Lead

Subject: Visit Confirmation – [*study (if applicable)*] [*date*]

Dear xxxx,

Study Title: (*if applicable*)

IRAS:

Please see below details of the confirmed visit to site.

You will be required to present photo ID on arrival.

Purpose of visit:

Date:

Timings:

Location of visit:

Equipment to be available:

[*If applicable for EPR access*] To enable access to EPR, please ensure that the signed EPR access agreement has been provided to the team at site in advance of the visit. During the visit you will be required to complete the Monitor Access Log.

If you have any questions, please do not hesitate to contact me.

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Appendix 4: Workplace Visitor Checklist

Prior to visit:

Send visitor request to R&I Professional Services Manager, Research Matron or Delivery Team Lead using template email

R&I Professional Services Manager, Research Matron or Team Lead review request, check arrangements with relevant team and space availability.

Confirm arrangements with visitor via template email, communicate requirement to bring photo ID, confirm location, role of visit, information accessible and equipment, duration of visit and identify designated R&I employee.

If EPR access will be required, ensure visitor is provided with the EPR access agreement, and EPR access requested for them, as per Guidelines 01

Confirm arrangements with other relevant departments to be visited e.g. pharmacy

Admin team to add visit to calendar and desk usage sheet

Day of visit

Designated R&I employee to collect visitor from foyer/office entrance. Check photo ID, ensure visitor signs in, as applicable,

Provide visitor with visitor lanyard and name badge.

Take visitor to designated workstation (*ensure this is clear of any confidential information expect those previously agreed*)

If equipment provided this needs to be documented and signed for by the visitor

Ensure visitor has signed the EPR access agreement and is provided with a Monitor Access log to complete if accessing EPR

Show visitor facilities [e.g. kitchen and washrooms] and inform them of the fire alarm requirements

At the end of visit

Collect any equipment provided and this receipt needs to be recorded

Ensure all confidential documentation is returned

Collect visitor's lanyard and name badge

Ensure the visitor signs out and escort them out of the building.

Appendix 5: Equipment log

Equipment for use by R&I visitor:

Date of visit:

Location of visit:

Visitor Details:

Name:

Company:

Contact details:

Equipment to be provided for use during visit:					
1.					
2.					
3.					
4.					
EPR Access required		Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

The above equipment has been provided to the visitor, detailed above, for use during their visit			
R&I signature:		Date	

I understand that I am fully responsible for this borrowed equipment and for its safe and timely return to the GHNHSFT R&I team at the scheduled time and date. I agree that the equipment is to be used solely for the agreed purpose of the visit.	
Visitor name:	
Visitor signature:	
Date:	

I confirm the above equipment has been returned to the R&I team.			
R&I signature:		Date	