



Visitor Check-In Best Practices for Manufacturing Facilities

Ensuring a secure, safe, and efficient environment is crucial when allowing contractors, vendors, and other non-employees, including visitors, into a manufacturing facility or any organization. Here's a comprehensive guide to best practices and policies that can help safeguard everyone involved while maintaining operational effectiveness.

Start Internally:

- Review your corporate policy on visitor check-in and out.
- What documents are you required to collect and serve? How frequently and to which visitors.
- Are hosts required to stay with a visitor?
- Does your facility have any additional compliance requirements outside of the standard policy such as ITAR or GMP?

Who should be included in the conversation: Your receptionist has the best insight. If the receptionist job is no one's job or shared by your staff, include feedback from those individuals. HR, EHS, Maintenance, Operations, Shipping/Receiving, Management and any other department that receives visitors will have documents, procedures and processes that must be adhered to.

Who is a visitor: Any person who steps foot on your property that is not directly employed by you should follow your visitor policy. This includes but is no way limited to:

- Contractors
- Vendors
- Regulatory Authorities
- Corporate Employees
- Employees from other facilities
- Former Employees/Retirees
- Temporary Employees
- Current and Potential Customers
- Service
- Job Applicants & Interviews
- Events/Tours
- Family Members
- Shipping/Receiving Drivers
- Drop offs (Door Dash, UPS/FedEx/Amazon deliveries)
- Walk-In/Solicitor/No Appointment

1. Preliminary Assessment:

- Due Diligence and Vendor/Contractor Evaluation: Before granting access to external parties, a comprehensive review of their credentials, licenses, safety records, and references should be conducted. This ensures that they meet the organization's safety and quality standards.
- Risk Assessment: Assess the potential risks related to the activities these external parties will be undertaking, including any that could affect the facility and its employees.
- Evaluate your Current Visitor Management Process: Logbooks may not be enough to meet all your requirements.
- Identify who is responsible for visitor management: It may be a receptionist, a guard, shared by all employees who receive visitors or a visitor management system (like Transmission).
- Regulatory and Environmental Adherence: Make sure all activities comply with local, state, and federal regulations, especially those concerning environmental policies.
- Protocol for Different Types of Visitors: Define protocols for including what level of access each visitor type has; what documents need to be served and collected and the proper safety orientation based on the purpose of the visit.
- Decide how you will address language barriers with your visitors and employees. Will you need signage in multiple languages to handle this? Will a specific employee meet with specific visitors in this circumstance?
- Consider the layout of your property and how it will be navigated by visitors. Provide clarity on confusing facility campuses and those spread over multiple addresses or acreage.
- Protect employee safety and privacy: Do not display employee names and phone numbers in the lobby.
- Plan for the unexpected. Global pandemics, employees working remotely, and other events can impact your visitor policy.
- Unsecured entrances: Are there propped doors or regular visitors who enter somewhere other than the lobby? Take this opportunity to close any loopholes that allow visitors to circumvent your policy.
- Security Protocols: Discuss the security measures in place, such as CCTV monitoring, security personnel, and alarms. Specify which areas are under surveillance to deter any potential malfeasance.
- Health and Safety Considerations: Given the current global landscape, consider adding policies around health checks for visitors, like masks, temperature checks, health questionnaires, vaccine verifications, or recent travel history or exposure to contagious diseases.

2. Orientation and Training:

- Prior to arrival and site entry, provide a thorough orientation of all expectations. Pre-register visitors whenever possible so they know their expectations and responsibilities before arrival.
- Environment: If your facility has areas with specific environmental conditions (e.g., cold storage, clean rooms), ensure visitors are pre-informed and adequately prepared.
- Safety Training: Ensure that all non-employees undergo site-specific safety training. Topics should include personal protective equipment (PPE), emergency evacuation procedures, hazardous materials, and other relevant safety protocols. Consider providing this information in video format, as it improves comprehension and compliance.
- On-Site Orientation: Provide a tour of the facility, pointing out key areas, risks, and essential facilities such as restrooms, break areas, and emergency exits.
- Authorization and Off-Limit Areas: Clearly state the process for authorizing visits and identify areas that are restricted to visitors.

3. Identification

- All visitors should provide government issued ID before granted access to your facility.
- Citizenship: Some companies, like ITAR compliant manufacturers, have specific requirements that must be adhered to for non-citizen visitors.
- Identification Badges: All visitors and non-employees should be issued temporary ID badges that state their name, company, and other relevant information

4. Documentation:

- Check-in/Check-out System: Keep a log of all non-employees entering and exiting the facility. A record of all entries and exits should be maintained for tracing purposes.
- Confidentiality: Some compliance regulations, like CTPAT, require you to keep specific information confidential from other visitors and non-employees.
- Contracts and Legal Agreements: All roles, responsibilities, compliance requirements, and liabilities should be clearly outlined in legal documents. This should include Non-Disclosure Agreements (NDAs) to protect sensitive and proprietary information. In the case of sensitive or proprietary information, Hold Harmless, Non-Disclosure Agreements can protect the company's interests.

- Liability Agreements:** Ensure legal agreements are in place that outline the responsibilities of each party in the event of accidents or damage.
- Proof of Insurance:** Require contractors/vendors to provide proof of necessary insurance coverage, such as workers' compensation, liability, etc.
- Work Permits/Licenses:** Especially for potentially hazardous work, a permit or license may be required by your local government and ensure that necessary precautions are taken.
- Health Screenings,** self-reported inventory declarations, job applicant questionnaires, logistic forms, and any other piece of information that you collect from a visitor should be attached to their visit.
- Re-serve Rates:** Determine how frequently these documents must be served and/or collected from visitors. Some documents may be valid longer than others. Safety information may need to be presented each visit.

5. Clear Communication:

- Scope of Work:** Ensure that the tasks to be performed are clearly outlined and understood by all parties involved.
- Reporting Procedures:** Make sure that non-employees know how and to whom they should report issues or concerns.
- Line of Communication:** Ensure that you have a way to communicate with everyone onsite about emergencies, including employees AND non-employees.
- Emergency Protocols:** Make certain that all visitors understand emergency evacuation routes and other emergency procedures. Elaborate on specific evacuation procedures in the event of emergencies like fires, earthquakes, or other unforeseen incidents. Ensure all visitors have a list of emergency contacts, which may include facility management, medical assistance, and local law enforcement.
- Consequences of Violations:** Describe disciplinary actions for both visitors and employees who breach the policy or fail to report observed violations.
- Promptly notify the host employee of a visitor's arrival and communicate any relevant information associated with their visit. Have a plan in place for real time communication with employees about non-employees on-site.**
- First-Aid and Medical Facilities:** Clearly mark first-aid stations and provide information about on-site or nearby medical facilities.
- Wi-Fi and Tech Access:** Detail any guest Wi-Fi networks or technology services available to visitors.

6. Access Control:

- Badge System: Offer ID badges to visitors so employees who are allowed or restricted from entering certain parts of the facility.
- Escort Requirements: Depending on the nature of the visit and the areas to be accessed, consider having an employee escort the visitor at all times.
- Vehicle Access: If contractors/vendors bring in vehicles, ensure a designated parking area and conduct necessary inspections if required.
- Deny entry to individuals who fail to comply with all your requirements, documentation, PPE or health screenings.
- Whenever possible, prevent employees from having to be gatekeepers by blacklisting unwanted individuals, solicitors or other visitors that may cause unwanted distractions. Outline the role of supervisors in managing and confronting unauthorized or unescorted visitors.
- Implement biometric access controls where necessary for high-security zones.

7. Equipment and Materials:

- PPE: Ensure that all visitors have and wear the appropriate PPE for their tasks and the areas they will access.
- Tools/Equipment: If contractors/vendors bring their tools/equipment, make sure they are in good condition, meet the facility's safety standards, and are properly inspected if necessary.
- Inventory: Provide a way for contractors to document the tools they are bringing onsite.

8. Compliance and Regulations:

- Regulatory Adherence: Ensure that all activities performed by non-employees comply with local, state, and federal regulations.
- Environmental Considerations: Contractors should be aware of and adhere to environmental policies, especially if they're working with or disposing of hazardous materials.
- Verify the visitor policy of any certification, compliance standard or other guidelines that may have specific requirements, such as ITAR.
- Provide your visitor with a copy of any legal agreements they have signed.

Data Protection and Privacy: Given the various types of data you'll be collecting, it's essential to ensure that all data storage and processing are GDPR-compliant (or follow other relevant data protection regulations). Ensure the privacy of visitors by keeping their information confidential and secure.

9. Oversight and Monitoring:

Supervision: Assign an internal contact or supervisor to oversee the contractor/vendor's work, ensuring that they are following procedures and protocols.

Feedback Loop: Create a mechanism for employees to report concerns or issues related to the contractors/vendors.

Audits/Reporting: Ensure you have a way to search, verify and export all visitor documents and records.

10. Completion and Feedback:

Post-Completion Review: After the task is complete, conduct a review to evaluate the contractor/vendor's performance.

Feedback Session: Meet with the contractor/vendor to discuss any feedback, learnings, and improvements for future collaborations.

Verify the hours billed are accurate by comparing the invoice with the time the contractor spent inside your facility.

Periodic Review: Regularly review and update the visitor policy to incorporate new practices, technologies, and feedback.

By adhering to these best practices, manufacturing facilities can ensure the safety and efficiency of operations when involving external parties. It also helps maintain a level of consistency and professionalism throughout the collaboration process.

Consider Visitor Management Software such as:  **transmission**

Integrating visitor management software that can streamline the registration process, notify hosts automatically, and digitally store records. Transmission understands the complexities and nuances involved in managing visitors and non-employees in a manufacturing facility. With a multitude of factors to consider, from preliminary assessments and orientation to compliance and oversight, a reliable system is essential. Our state-of-the-art visitor management system is designed to handle every aspect highlighted in the guide, ensuring seamless integration of best practices.