



## **Remote Site Safety**

Consumer interaction, at times, can be very dangerous, especially when we are visiting consumers outside of the office. In the office, we have more control over the environment, and we have additional resources for assistance in our co-workers and security staff. In this article, we will summarize TCRMF's training on Remote Site Safety. We will use this article to run through the different tactics case coordinators should use to keep themselves safe when they need to meet consumers away from the office.

### **Preparation**

Have you ever been in a situation where you were completely unfamiliar with the area and did not know what to do? It brings on a moment of anxiousness that clouds your mind. This slows down your opportunity to make the right decision if any decision at all. However, if you prepared yourself for the situation you were getting into, most likely you thought of scenarios and your response to those scenarios. This is your survival mindset. You should always be prepared and the best way to do this for visits away from the office is to gather as much information as possible. Also, trust your gut. Nine times out of ten it is right. If at any time your gut tells you something is not right, listen to it. Then, take the steps you need to get to safety, reschedule the visit, or change the location of the visit. This applies to all phases of remote site visits.

Review the consumer's file. Look for any safety notes that previous case coordinators have left. Are there any concerns you need to prepare yourself for? This is one practice that cannot be recommended enough. Get into the practice of leaving safety notes in the consumer's file as it relates to the individual, neighborhood of the consumer's home, inside the consumer's home, and even other individuals in the home. You will not be the only case coordinator to work with the consumer. If the file does not have safety notes for anyone else who works with the consumer, how can they prepare themselves properly?

You also want to get a feel for the neighborhood if you have never been in the area before. Look up the address on Google Street View. Granted the screen shot may not be the most current but you can use it to identify safety hazards in close proximity to the consumer's home. While using Google maps, you also want to identify your quickest way out of the neighborhood. If you must leave the consumer's home suddenly, the last thing you want to do is turn around to go back the way you came. That is valuable time you are losing.

If you do not have one already, download a safety app on your phone. A few TCRMF members have downloaded a safety app on employee work phones. Some of the apps that are out there are Safe Signal, Life360, bSafe, and Send Help. Work with your Manager or IT Department to ensure you download an officially recognized app.

In the preparation phase, we will want to periodically review SAMA or PMAB techniques just in case we need to use it. If you have not used it in a while and your annual refresh

training is still a month or two away, it would be a good time to review on your own or with a certified staff trainer. It is also important to familiarize yourself with risk markers that individuals display or have done in the past. First off, a history of violence is the best indicator of future violence. For this reason, you need to know who you are meeting with. Gather as much pertinent information as possible. You also want to watch for anxious or agitated behavior. A few examples of each are the clinching of teeth, flexing of muscles, jitteriness, increased sweating, pacing, and becoming argumentative.

### **Setting the appointment**

If you have never met with the consumer before, the first step would be to meet him/her/them in a controlled environment, like the office. You have to familiarize yourself with the consumer and actually meeting with them is the best way to do that. If you cannot meet in the office, then meet in a public place. This could be in the library which is great because they have private rooms. Other public places that would accommodate meeting with the consumer are a park, fast food restaurant, or café. However, you have to be mindful of your proximity to others and their ability to overhear your discussions with the consumer. You could run into potential HPPA violations.

When calling the consumer to set up the visit, it is not as simple as agreeing on a day and time. The first thing you want to do is assess the consumer's state of mind based on the conversation. If you do not feel comfortable going to the home, use a public setting for the visit. If necessary, ask a co-worker to accompany you on the visit. You also need to know who or what else is going to be present during the visit. Ask the consumer if anyone else will be present when you arrive. You will also want to ask the consumer to separate any animals prior to your arrival.

The most important step while on the phone with the consumer is preparing him/her/them for what is to take place during the visit and how long it is going to take. If you miss this step, the consumer's vision of your visit will not match yours. You may plan on visiting with them for an hour and a half where they may think you will only be there for thirty minutes. After about thirty-five or forty minutes, your visit will most likely take a turn for the worse. Preparing the consumer is vitally important to the success of your time with them.

### **Arrival Best Practices**

Upon arrival, your survival mindset needs to engage, and you need to pay attention to everything going on around you. When you pull up to the consumer's home, do not park in the driveway. Park on the street in the open away from large items such as an abandoned car, dumpsters, or dense bushes. These objects provide cover for people with bad intentions. Also, remember to park your car in the direction of your quickest route out.

As you park, you should not be toiling about with items you need for the visit. The file should be sitting in the passenger seat ready to go. Do not take this moment to organize the file. This will take your eyes off of your surroundings and someone could take advantage of this. We are aware of at least one case coordinator (not with TCRMF) being car-jacked this way.

As you walk to the residence or through the apartment complex, walk tall and with confidence. Bad guys look for the meek and frail. If you are walking with your head up and acknowledge their presence, they are less likely to do anything. Also, seeing them sooner gives you an opportunity to prepare yourself for self-defense measures.

Once you knock on the door, take a few steps back and turn sideways. This stance allows for a quicker escape if you need to run. While standing there waiting for the door to be opened, listen for voices. Did the consumer say anyone else was going to be present during the visit? If they said no, why do you hear other voices in the residence? When they open the door, greet them, and then ask if anyone else is inside. Again, trust your gut. If something does not feel right, do not enter the home. Invite the consumer outside to conduct the visit or politely excuse yourself and leave. You can always reschedule a visit. The same applies if the consumer is displaying any of the risk markers mentioned before. Always trust your instincts.

### **Inside the home**

Once you have entered the residence, your survival mindset again needs to be engaged. Take a few moments just inside the door to let your eyes adjust. Individuals with depression often like to keep their home dark. It will be hard to see at first and you may not see a trip hazard that is in your path. While walking inside, ask where you can sit. Ideally you want to stay in the living room or sit at the kitchen table. Sit out of reach and always try to keep yourself between the exit door and the consumer. Do not let yourself get boxed in. You must have a clear path to the exit door.

Constantly monitor your surroundings. Pay attention to the demeanor of the consumer and anyone else in the home. Also, do not attempt to pet any animals. They are normally cute and cuddly, but you are in their home. Pets can be unpredictable, so it is best that they be separated from the area you are conducting the visit.

If you observe behavior or conditions in the home that prompts you to call the police, CPS, or FPS, do not return to the home for future visits. Rather, you should begin conducting visits at a public location. Be sure to leave a note in the employee's file in order to alert any center employee that might go into the home.

### **After the visit**

When you leave the consumer's home, do not let your guard down. Walk tall and with confidence as you return to your car. Most importantly, do not sit in your car outside the home. There have been countless incidents where the consumer walked out to the car and startled the case coordinator. Drive to a nearby public location, such as a store parking lot or gas station. Do not drive so far that you forget the notes you were going to add to the file. Once parked, write down your notes, call the office if you need to, and organize the file for the next visit.

Visits with consumers are an integral part of the services provided by our centers. Most visits are completed without incident. However, case coordinators can find themselves in

a threatening situation with any visit. When it does happen, there will most likely be cues that the aggressive behavior is about to happen. It is important that case coordinators prepare themselves with as much information as possible, even for a consumer they have visited many times. Do not let your guard down and above all else always trust your instincts.

*The contents of this article covered the high points of our Remote Site Safety training. However, it lacks the advantage of more detailed discussions that normally occur in a class setting. Please contact your TCRMF Risk Control Consultants for more information or to schedule a training for your staff.*