

## Key Success Factors for Virtual Site Visit

### Integrity

#### Preparing for Site Visit

- Test audio and video capability ahead of the first day of site visit. The applicant should be able to clearly see and hear you during the interview. If you are using a cell phone, ensure that the device is positioned so your face can be seen by the other participants.
- Know how to mute/unmute your mic.
- Know how to turn on and off the screen sharing function. Prepare any items you plan to screen share during interviews.
- Make sure anything you would want to share on the screen does not have the applicant's name on it.
- Determine if showing figures and sharing screen is acceptable from applicant
- Book a conference room in your organization or designate another private space to participate in the site visit in order to avoid accidentally breaking confidentiality rules.

#### During Site Visit

- Maintain strict confidentiality rules by avoiding using the organization's name during questioning. Instead, use the generic term of "your organization".
- Review **all** documentation you requested from the applicant.
- Accept information provided by the applicant as accurate and factual.
- Participate in all designated interviews, including opening and closing meetings.

### Communication

#### Preparing for Site Visit

- Make sure your name displays correctly on the video call. This will serve as your name tag. Use the naming convention "First Name Last Name – TNCPE".
- Store names and cell phone numbers of all team members so you can make calls and send texts during the site visit.

#### During Site Visit

- Be as engaged in the interview as you would be if you were in the room. Maintain eye contact, nod head, and smile as appropriate.
- Use your prepared Site Visit Issue Worksheets to guide questions through ADLI/LeTCI and Basic/Overall/Multiple.
- Ask open ended questions that will help you better understand the applicant, as opposed to yes/no questions.

## Focus

### Preparing for Site Visit

- Eliminate distractions by moving to a room with a closed door.
- Silence all work and personal notifications on your computer and other electronic devices.
- Do not engage in work personal activities (i.e., checking emails, making phone calls, participating in meetings, etc.) during site visit, including during lunch, team caucuses, and evening meetings/documentation.

### During Site Visit

- Do not eat or drink during interviews in which you are participating.
- Do not leave the interview or stop your video during the scheduled meeting time.
- Contact your team leader immediately in the event of an emergency.

## Discipline

### Preparing for Site Visit

- Prepare separate space for note taking. Notes should not be visible to the applicant if screen sharing.
- Ensure Site Visit Issue Worksheets are available in your chosen format for note taking.

### During Site Visit

- If possible, take notes in a separate space from where the call is taking place (i.e., hard copy, another device). Be mindful of noise created by a keyboard and mute or take notes manually to avoid creating a distraction in the interview.
- As soon as possible after the interview, update strength and OFI comments based on new information obtained and document the data gathered that supports the addition, deletion, modification, or retention of strength and OFI comments in the Site Visit Form in Scorebook Navigator. Remove all uses of “It is not clear” or “There is no evidence” from the comments.