

Documenting Site Visits

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1. Purpose

The purpose of this document is to establish guidelines for documenting site visits conducted by Solar Gain employees, including both technical and non-technical personnel. This SOP outlines the general requirements documentation based on the type of site visit taking place. The overall goal of this SOP is to ensure consistent and thorough documentation of site visits, regardless of the nature of the personnel conducting them, thereby promoting safety, information sharing, and accurate record-keeping within Solar Gain.

2. Responsibilities

- Service Coordinator (SC)
 - Inform technician of site visit details and objectives.
 - Facilitate scheduling and coordinating with customers.
- Technician (Tech)
 - Coordinate site visit.
 - Confirm site visit information with dispatcher.
 - Schedule with property point of contact.
 - Confirm access information. (Gate codes, special instructions, etc.)
 - Prepare tools, equipment, and materials.
 - Perform site visit and complete site visit unique objectives.
 - Photograph and document site-specific information.
 - Upload and archive site details and photos into the WhatsApp group chat and into the google drive.
- Sales Representative
 - Coordinate a site visit with the property point of contact.
 - Photograph and document site-specific information.
 - Upload and archive site details and photos into the google drive.
 - Communicate with design team to ensure a complete and accurate handoff of site visit details and photos.

3. Procedure and Work Instructions

The type of site visit will change the requirements of the site visit, please refer to the specific type of site visit for specific details. Refer to the general site survey procedure for universal instructions applicable to all visits.

1. General site survey procedure
 - a. SC hands off site visit details to Techs
 - b. SC/Tech schedules a visit with the property point of contact.
 - i. Gather access details. (Gate codes, point of contact details, access restrictions, etc.)
 - c. Tech prepares for site visit based on needs.
 - i. Tools
 - ii. Materials
 - iii. Equipment
 - d. Tech executes site visit.
 - i. Upon arrival, complete required documentation (daily site log, etc.).
 - ii. Complete unique site visit type requirements. *See unique site visit details in each section.*
 - e. Tech closes out site visit.
 - i. Complete end of day report.
 - ii. Report to manager at end of day.
 - iii. Complete and archive documentation in WhatsApp and in the google drive.
 - iv. SC/Tech follows up with customer after site visit to touch bases on the customer experience.
2. Site visit / Assessment / Prospecting visit (Sales representative)

A site survey is performed before a signed contract with the intent to gather information design needs to begin the design process. This is typically performed by sales representatives but can be performed by other employees as needed.

 - a. Sales rep gathers site data using site capture templates to inform data gathering.
 - b. Data should be in the form of photographs and written notes.
 - c. Sales rep should verify all crucial information on site to prevent need for additional visits.

3. Diagnostic (Tech)

Diagnostic site visits are performed when the cause and resolution of a system malfunction are not known. Techs visit the site to determine the cause and a resolution of the system malfunction. Simple issues may be resolved during a diagnostic visit.

- a. Tech should contact tech support for assistance with diagnosing repairs when appropriate.
- b. Gather device specific information for follow-up actions such as an RMA.
 - i. Photograph nameplate.
 1. Serial numbers, model, make
 - ii. Photograph failure points if applicable.

4. Service visit (Tech)

A service visit is a visit to resolve a customer complaint. The issue and solution are known. Techs are given a handoff with the details of the visit and execute the site visit and resolution.

- a. Follow general service visit procedures. No unique instructions.

5. R&R Inspection

A removal and re-installation (R&R) site visit designed to gather key information on the roof, existing system, and logistical considerations for R&R. Tech will gather R&R unique information.

- a. Roof characteristics
 - i. Type (Flat, gabled, etc.)
 - ii. Material (Shingle, tile, metal, rolled, etc.)
- b. Existing system details
 - i. Number of panels
 - ii. Type of racking & mounting
 - iii. Number of standoffs (include number of penetrations into roof framing)
 - iv. Manufacturer information on primary components with warranties (Panels, inverters, etc.)
 1. Confirm no warranties are voided by our work before work begins, such as Tesla batteries.
 - v. Unusable materials and components.
- c. Logistical considerations
 - i. SC determines the storage location of removed system with customer.
 - ii. Tech confirms the storage location with the customer upon arrival.
 - iii. Tech prepares safety and reviews with SC.
 1. Fall protection (Ladder, lift, tie-off & harness)
 - iv. Tech prepares transporting materials and equipment, and reviews with SC.
 - v. Tech prepares personnel requirements and reviews with SC.

6. R&R System removal

A removal site visit designed to remove an existing solar system to facilitate roof work. Techs will execute the removal and storage of the existing solar system.

- a. Upon arrival on site, confirm with the customer the storage location of the removed system.
- b. Remove and store existing solar system.
- c. Photograph and record removal process throughout the day.
- d. Report photographs and records at EOD in WhatsApp.

7. R&R System re-installation

A re-installation site visit is designed to re-install an existing solar system that was removed to facilitate roof work. Techs will execute the re-installation and re-energizing of the solar system.

- a. SC coordinates and schedules re-energizing and commissioning the system.
- b. Techs re-install, re-energize, and commission the solar system.
- c. Photograph and record re-installation process throughout the day.
- d. Report photographs and records at EOD in WhatsApp.

8. Preventative maintenance (Tech)

Preventative maintenance site visits are performed annually to review the solar system and have unique contractual obligations that must be met. In addition to the preventative maintenance a required report, unique from the standard end of day report, must be generated.

- a. SC schedules and coordinates site visit with the customer.
- b. Tech performs preventative maintenance following the preventative maintenance checklist, provided by SC.
- c. Tech generates preventative maintenance site capture report.
- d. Tech delivers the site capture report to the customer.
- e. SC follows up with customer.

9. RMA initiation (Tech)

RMA initiation visits are performed to gather the required equipment information to facilitate an RMA. Techs will have a list of equipment details requested by the manufacturer, that they will acquire during their visit. [See QRG-SD-001](#).

- a. Tech should contact manufacturer to confirm required information for the RMA.
- b. Gather device specific information required for the RMA.
 - i. Photograph nameplate.
 1. Serial numbers, model, make
 - ii. Photograph failure points if applicable.
 - iii. Other requested information.

10. RMA installation (Tech)

RMA installation visits are performed to remove and replace equipment going through an RMA. Techs remove, replace, and document the RMA equipment. [See QRG-SD-002](#).

- a. Techs remove malfunctioning equipment.
- b. Techs install replacement equipment.
- c. Techs prepare malfunctioning equipment for return when required by manufacturer.
- d. Techs photograph and record the removal, installation, and preparation of equipment for return.

4. Acronyms

Acronyms:

- **SC:** Service coordinator
- **R&R:** Removal and re-installation
- **RMA:** Return merchandise authorization
- **EOD:** End of day

5. Appendices and Documentation

- [QRG-SD-001 Service order creation](#)
- [QRG-SD-002 RMA Processing](#)

6. References

1. Bert Klunder | Service Department
 - a. Primary contributor: SOP-SD-003 Version 1

7. Revision History

1. Version 1:
 - a. Author: [Rio Astiz]
 - b. Approval Date:
 - c. Approver: [Andrew Wible]
 - d. Changes
 - i. Initial Document