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Beyond COVID-19: Physical inspections for residential properties during COVID-19 (Scotland)

Version 4



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Published by the Royal Institution of Chartered Surveyors (RICS)
Parliament Square
London
SW1P 3AD
www.rics.org

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1 Introduction and general considerations

The purpose of this guidance is to enable RICS professionals and RICS regulated firms to deliver services to clients safely, consistently and in line with **Scottish government guidelines**.

It is critical that before any inspections are undertaken, RICS professionals and regulated firms consider and assess the most up to date government guidance.

RICS professionals and regulated firms delivering services to clients in Scotland are reminded of the following recently published government and industry documents:

- On 2 November 2020, the Scottish government's five-level system was applied to help mitigate the spread of COVID-19. Further information on the protection levels can be found **here**
- In June 2020, the Scottish government announced a relaxation on restriction on housing moves and issued **guidance on moving home**
- While the government's approach to national and local restrictions has changed, the housing market in Scotland remains open and residential property professionals can continue to undertake the activities required for rental or sale, as long as social distancing is adhered to and adequate protection measures are in place.
- RICS professionals and regulated firms must follow the Scottish government's latest **guidance for employers and businesses** on COVID-19 and other relevant guidance including Health Protection Scotland (HPS) COVID-19 information and guidance for general (non-healthcare) settings. Remote working remains the default position for those who can. The gradual return to offices will commence once Scotland moves beyond Level 0. Government guidance on the return to the office can be found **here**

This document builds on government guidelines and focuses on physical inspections where RICS professionals need to come into contact with people and enter private residential properties to undertake any activity required for the rental or sale of that property.

Chartered surveyors can continue to visit properties to carry out the inspections necessary to carry out a Home Report and any additional survey reports that may be required, provided they can be carried out safely and in accordance with government and Public Health Scotland social distancing guidelines.

RICS professionals and staff in RICS regulated firms need to ensure they continue to provide the highest levels of service while maintaining current social distancing guidelines and that they comply with public health guidance guidelines.

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RICS professionals and RICS regulated firms must ensure that the risk assessment for the business addresses the risks around COVID-19. Businesses should keep all risk mitigation measures under regular review. Further information is available from the **Health and Safety Executive (HSE)**.

If it is not possible to inspect the property safely to the extent required to provide an opinion of value and/or condition on a restricted basis, it may be necessary to decline the instruction. If the instruction is accepted, any restrictions to the inspection need to be recorded, agreed where appropriate and highlighted in the report. Where possible, a disclaimer should be included in both the terms and conditions and the report relating to any errors or omissions in the report caused by any inability to inspect relevant areas.

RICS professionals and RICS regulated firms should always consider their safety and the wellbeing of their employees in their decision-making process. It is more important than ever to ensure workers are treated fairly. The Scottish government and Scottish Trades Union Congress (STUC) have issued a joint statement about this.

As the situation and guidance in this area is constantly evolving, RICS will update this information as required.

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2 Recommendations before the inspection

RICS professionals and RICS regulated firms should:

- act in a transparent and professional manner with all parties involved
- be clear with the client/occupier about their service and any restrictions to the service as a result of COVID-19 and **social distancing guidelines** from the Scottish government
- ensure that the obligations in relation to client/consumer confidentiality and GDPR-compliant safe storage of client/consumer information continue to apply, even though some or all staff may be working remotely
- avoid physical contact with clients and contact clients/consumers by email, video conferencing platforms, or telephone
- when liaising with other property professionals avoid physical contact and adhere to current social distancing measures at all times
- minimise physical contact during key handovers when possible and ensure keys are sanitised at each handover
- RICS professionals should not enter a property where a member of the household is showing symptoms of COVID-19 or self-isolating. When organising an inspection of the subject property, check with clients/occupiers whether anyone is either in an at-risk category, **vulnerable group, shielding**, has or has had COVID-19 symptoms, has not yet completed the required period of household self-isolation, or is awaiting test results. Note that this is likely to be sensitive health-related data and must be collected and stored in accordance with data protection legislation. RICS has produced guidance for RICS professionals and regulated firms on **data protection and reopening the property market**.
- where possible, inspections should take place by appointment only, with one person visiting the property at any time
- RICS professionals must follow Scottish government guidance on **physical distancing** and **face covering** when in contact with other people
- secure as much information as possible from the client and/or occupier prior to the visit and as part of the pre-inspection research, including property use, occupancy, location, potential risk to occupants and any other relevant information required for the subject property and instruction; this includes carrying out a pre-inspection risk assessment with the occupier/client
- take all reasonable steps to ensure the client and property occupier is provided with as much information as possible about the visits, service and areas of the property that will be inspected in advance and ensure the inspection, service and arrangements are agreed by all parties prior to the physical inspection
- sanitise equipment in line with current public health guidance, periodically and as often as practical

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- ask occupiers to prepare for the inspection and share the following recommendations. Please note that this is not exhaustive list:
 - occupiers should either vacate the property or seek to minimise contact with surveyor
 - pets to be contained in one room or, if not possible, to be kept at a distance of 2 metres
 - when people/families are in occupation, they should maintain social distancing in line with government guidelines
 - ask the client/occupier to ensure you have access to all the parts of the property you need to inspect and ensure all areas are open or easily accessible (e.g. cellars, lofts, doors and windows in the case of a home report) to reduce contact with surfaces as much as possible
 - ask occupiers to ensure surfaces have been cleaned with household cleaning products in line with public health advice
 - advise client/occupier the property will be left as presented/found at arrival.
- ask the occupier to ensure that the property is **well ventilated** in advance of and during the inspection
- examples of pre-inspection health-related questions for clients/occupiers are:
 - are you in an at-risk category as outlined by the government?
 - are you or is anyone in your household symptomatic?
 - have you or anyone in the household tested positive?
 - have you or anyone in your household been self-isolating in accordance with government guidelines?
 - are you able to leave the property for the duration of internal inspection?

More advice can be found in Scottish government [guidance on moving home](#) and pan-industry guidance on **reopening the home moving market safely**.

It would also help to ask the occupier, when appropriate, to advise the RICS professional or RICS regulated firm member of staff the questions below.

Access

- Where is the electric meter located in the property? The RICS professional will require access.
- Where is the gas meter located? The RICS professional will require access.
- Where is the water meter located? The RICS professional will require access.
- Where is the stopcock located?
- Where is the boiler located?
- Where is the cold-water storage tank located (if applicable)?

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• Where is the hot water cylinder located (if applicable)?

- Are there any inaccessible areas?

Documentation

- Do you have any certification regarding gas and electricity safety?
- Do you have any guarantees or warranties for windows, boilers, historical damp or rot treatment, extensions?
- Do you have any documentation in respect of building warrants or planning consents relating to extensions or other improvements?
- To minimise physical contact, can you share any relevant documents electronically?

General

- Is the property occupied?
- What is the current and future use of the property?
- Are you aware of any issues in the property? If yes, please specify where.
- What is the broadband service and where is the connection point (if applicable)?

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3 Recommendations during the inspection

RICS professionals and RICS regulated firms should:

- consider health and safety aspects and any relevant current government advice in relation to travelling to the property, accessing the property, carrying out an inspection and delivering the service
- request that occupiers not be in the property if possible, in order to avoid physical contact and ensure compliance to existing social distancing measures. Consumer recommendations are highlighted in **recent Scottish guidance**
- adhere to Scottish government guidelines on cleaning hands thoroughly prior to and upon leaving the property
- comply with current guidelines on face coverings and Personal Protective Equipment (PPE). In line with Scottish government guidelines, PPE is not expected to be needed outside of health care settings for purposes of controlling the risk of COVID-19. However, if a risk assessment indicates a higher level of contamination or transmission, then the need for additional PPE could be considered. Use of PPE is not a substitute for physical distancing practices, which must be maintained wherever possible
- only take the equipment and tools actually required for the inspection to the property, according to the service delivered
- where the occupier has to be present, request that they follow the government social distancing guidelines
- aim for as minimal an amount of contact as possible with surfaces when inspecting elements of the property
- ensure you keep a record of inspection using appropriate recording equipment, including any limitations of the inspection as a result of restrictions
- ensure you take an adequate number of photographs/videos. These can be especially helpful for restricted/inaccessible areas.

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4 Recommendations after the inspection

RICS professionals and RICS regulated firms should:

- wash/sanitise their hands thoroughly and sanitise their equipment
- appropriately dispose of any disposable PPE used during inspection in line with government guidelines
- communicate the outcome/findings of the inspection appropriately with the client as per the instruction and agreed terms of engagement
- deliver reports in line with current RICS standards and guidance
- ensure that any restrictions of information/advice/areas which weren't inspected due to public health limitations are made clear and stated in report(s)
- note any limitations to inspection/service delivered as a result of current social distancing measures and health and safety risks, and where possible, include a disclaimer relating to any errors or omissions arising from any limitations to the inspection or service delivered
- highlight any risks and hazards found during the inspection with the client, depending on the advice being given.

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5 Professional accountability and responsibility

RICS professionals and RICS regulated firms are expected to behave ethically and professionally, while taking adequate steps to consider health and safety at all times for all parties involved.

The Scottish government has set out their requirements to ensure compliance to social distancing measures. Professionals must adhere to government guidelines at all times.

If you have suspected symptoms or COVID-19 has been confirmed, you need to self-isolate and must not be at work. Follow the **guidance on self-isolation on NHS Inform**.

No work should be carried out by a person who has COVID-19 symptoms, however mild, or by anyone who has been asked to self-isolate.

People who have been in close contact with someone who has the virus (as confirmed by testing) should self-isolate, even if they don't have symptoms. This is part of **Test and Protect** – Scotland's approach to implementing the *Test, Trace, Isolate, Support* strategy.

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