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NAVIGATOR SITE VISIT OVERVIEW

This document outlines the process of viewing Site Visit Checklists in the Certification Portal.

REVIEW SITE VISIT CHECKLISTS

Your Account Manager will periodically perform a site visit for each site location and will complete a Site Visit Checklist. You can view the Site Visit Checklists from the My Entity page as well as on each Location record.

MY ENTITY PAGE

There is a Site Visit Checklist related list located on the My Entity page. This will list all site visits for all Locations.

Scroll down on My Entity page to find Site Visit Checklist related list
Related List on My Entity page:

Location Page
The Site Visit Checklist related list on a Location record will list all site visits for the location that is viewed.
SITE VISIT CHECKLIST
The Site Visit Checklist record will display all the details of the site visit that was completed by your Account Manager. The record is read-only.