

## Checklist for setting up homeworking

You can use this checklist in one of two ways...

1. To ensure that as a manager and colleague you can take the actions below to facilitate successfully working from Home, prior to consideration of an application.
2. Use this as a checklist after an application for Home Working has been agreed, to sign off on agreed actions for a home agreement.

	<b>Action</b>	<b>Completed</b> (insert date & notes)
1	Manager to check the colleague has a suitable area at home to work (consider confidentiality and ability to be overheard)	
2	Manager and colleague discuss care for dependants and childcare within working hours. Colleague to demonstrate plans in place for dependants and childcare by someone other than the employee and how uninterrupted work can take place.	
3	Manager to check employee has appropriate equipment available:	
	<ul style="list-style-type: none"> <li>• Furniture – Is specialist equipment required as part of a risk assessment/reasonable adjustment? (See point 15 below)</li> </ul>	
	<ul style="list-style-type: none"> <li>• Phone</li> <li>• Use of Trust mobile phone.</li> </ul>	

	<ul style="list-style-type: none"> <li>• Use of personal phone expense claims for business calls.</li> </ul>	
	<ul style="list-style-type: none"> <li>• IT – Trust encrypted laptop/PC</li> </ul>	
	<ul style="list-style-type: none"> <li>• Adequate internet connection</li> </ul>	
4	Manager to check IT support is in place including what will be provided by who, when and how	
5	<p>Colleague to check all legal and contractual implications that may arise from home working...</p> <ul style="list-style-type: none"> <li>• Home insurer informed?</li> <li>• Mortgage, rental agreement checked?</li> <li>• Check for any legal covenants/ restrictions on deeds and lease agreements?</li> <li>• Mortgage provider/ landlord informed?</li> <li>• Local Council informed re: council Tax?</li> </ul>	
6	<p>Manager and colleague to carry out a health and safety <a href="#">home working risk assessment</a> Review of lone working Policy/ review of personal safety. Work related meetings, must take place on site and not within the home. Other than pre agreed meeting to support risk management process.</p>	
7	<p>Colleague to complete a <a href="#">DSE Assessment</a> Colleague to complete DSE eLearning</p>	
8	Colleague agrees to bring equipment to a Trust site and for it to be PAT testing prior to expiry.	
9	<p>Manager and colleagues to agree keeping in touch through, for example:</p> <ul style="list-style-type: none"> <li>• Phone/Skype or MS Team®/email</li> </ul>	

	<ul style="list-style-type: none"> <li>Planned meetings at the main office/base</li> </ul>	
	<ul style="list-style-type: none"> <li>Planned meetings at the homeworke’s home</li> </ul>	
	<ul style="list-style-type: none"> <li>Co-operation and working with colleagues</li> </ul>	
10	<p>Agree frequency of management/colleague contact. How this contact will take place and where</p>	
11	<p>Manager and colleagues to agree how often the employee will attend the main base/office. Agree arrangements to return to on-site working (e.g. unexpected illness or absence of an on-site colleague, declaration of a major incident) Manager and employee to agree where they will work when on site, including hot desking.</p>	
12	<p>Manager and colleague to agree scope of work, objectives and how performance will be monitored and managed</p>	
14	<p>Confirm that absence reporting to be in accordance with current department procedures and how absence from work will be managed.</p>	
15	<p>Manager to consider if reasonable adjustments should be considered – see <a href="#">Guide to reasonable adjustment</a> Consider support and financial support from Access to work if staff member comes under the Equality Act.</p>	
16	<p>Manager and colleague to agree any arrangements for claiming expenses, what can be claimed and how, (use of personal</p>	

	mobile ) Review <a href="#">Business Travel policy</a> .	
17	Colleague to ensure all IT/ data protection and GDPR <a href="#">E learning</a> maintained and remains up to date. Compliance with all Trust policies... Refresh on <a href="#">Information governance/ It Security/Storing and sharing of electronic and Paper records/ portable IT equipment</a> .	
18	Manager and colleague to agree how often the homeworking arrangement will be reviewed, (As a minimum - review at no later than 12 months) When and where review meetings will be held – if a trial period has been agreed, when that will be assessed, and what will happen if it doesn't work out	
19	Manager to put arrangements and agreement in writing.	
20	Manager and Employee both sign and date the agreement. To show the details of the homeworking arrangement that have been agreed	
17	Manager to retain agreement on file and agree date it is to start..	

**Signed..... (Manager) ..... Date**

**Signed ..... (Colleague) ..... Date**