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WORKING REMOTELY GUIDELINES

Introduction and Aim

Agile Working is the ability to work in the place and at the time most appropriate for the task in hand. Cardiff and Vale University Health Board (the UHB) believes that work is an activity not a place and is committed to implementing and maintaining agile working for the benefit of patients, staff and the organisation.

Working remotely is a recognised flexible working practice which, in appropriate circumstances, can help staff balance their work and personal lives, support the most effective and efficient provision of services, and have a positive impact on the environment. It can also act as an aid to recruitment and retention.

The UHB recognises the opportunities provided by agile working practices to recruit and retain highly skilled and motivated staff, to transform staff and patient experience and create the diverse workforce we need for the future, in line with our strategy Shaping Our Future Wellbeing. We have an Agile Working Framework, which sets out our intention to promote and encourage different ways of working by maximising the use of technology and digital solutions.

The Agile Working Framework describes a number of ways in which people can work agilely, including hybrid working (i.e., one or several days of the week / fortnight are spent on site; the rest of the time is spent working remotely or on a mobile basis) and remote working (when an individual attends their official base once/ twice a month for team cohesion and teamwork, the rest of the time is mainly worked from a remote location). Individuals who work in a hybrid or remote way, usually spend any time which is not at their official base working from home. The UHB encourages managers to develop local agreements in line with these guidelines and the agile framework to support hybrid working.

Objectives

- To provide a clear and manageable process for working remotely
- To clarify the respective responsibilities of the manager and employee in relation to remote working
- To set out the factors which should be considered when deciding if working remotely is appropriate
- To ensure employees working remotely work safely and securely

Scope

These guidelines apply to all staff. However, it is recognised that not all roles or aspects of a role, are suitable for remote working and the application of the guidelines will be determined by service, team and individual needs.

Document Title: Working Remotely Guidelines	2 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

Requests from junior doctors for working remotely will be treated in line with all other flexible working requests and will be managed by the Deanery.	
Equality and Health Impact Assessment	These Guidelines are covered by the Adaptable Workforce Policy EHIA – this found there to be a positive impact
Documents to read alongside these Guidelines	Agile Working Framework Adaptable Workforce Policy Flexible Working Procedure Managing Attendance at Work Policy Working Times Procedure Respect and Resolution Policy Capability Policy Disciplinary Policy and Procedure IT Security Policy and Procedure Information Governance Policy Display Screen Equipment and Eye Test Procedure Health and Safety Policy Counter Fraud and Corruption Policy IT Security Off Site Mobile Computing Procedure
Accountable Executive or Clinical Board Director	Executive Director of People and Culture
Author(s)	People Services Advisor/ RCN Representative
<u>Disclaimer</u>	
If the review date of this document has passed please make sure the version you are using is the most up to date either by contacting the document author or the Governance Department.	

Summary of reviews/amendments			
Version number	Date review approved	Date published	Summary of Amendments
1			New Guidelines developed to support the Adaptable Workforce Policy and Flexible Working Procedure
2	01.12.21	07.12.2021	New title – changed from Occasional Homeworking Guidelines to Working Remotely Guideline Updated in line with the Agile Working Framework Emphasis changed from occasional homeworking to working remotely on a longer-term basis

Document Title: Working Remotely Guidelines	3 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

			<p>Greater emphasis placed on the benefit to organisation and team, as well as the individual</p> <p>Improved guidance on managing employees who work remotely</p> <p>New sections on insurance and expenses</p> <p>Application form removed</p> <p>Self-assessment form added</p>
3	27.09.2023	23.11.2023	<p>Added agile framework flowchart as an appendix</p> <p>Improved guidance on insurance, information governance and expenses</p> <p>E-Roster added to managers responsibility</p> <p>Definitions of flexible working added</p>

Document Title: Working Remotely Guidelines	4 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

Contents

1	PRINCIPLES AND CONSIDERATIONS	5
2	DEFINITIONS OF FLEXIBLE WORKING	7
3	RESPONSIBILITIES	7
4	PROCEDURE FOR AGREEING REMOTE AND HYBRID WORKING	8
5	MANAGEMENT OF EMPLOYEES WHO WORK REMOTELY	8
6	HEALTH, SAFETY AND SECURITY	9
7	INFORMATION GOVERNANCE / CONFIDENTIALITY	11
8	INSURANCE	11
9	EXPENSES	12
Appendices		
1	Home Working Self- Assessment Form	14
2	Agile Framework Flowchart	16

Document Title: Working Remotely Guidelines	5 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

1	PRINCIPLES AND CONSIDERATIONS
1.1	<p>There are numerous benefits to working remotely for the UHB and some of these are set out in our Agile Working Framework, but it is not a 'one size fits all' solution. Whilst agile working can be considered for all employees, not everyone works in the kind of role that can be done in a hybrid or remote way most or all of the time. However, managers should consider all requests and should not make assumptions based on the type of role that the individual works in. Managers should ensure that they know their staff and talk to them about how hybrid or remote working would impact on them and the service they deliver when considering if parts of the role could be undertaken remotely, either from home or from another site.</p> <p>Arrangements for hybrid and remote working should be agreed by the manager and team/individual and must be reviewed on a regular basis. Working remotely on an agile basis does not work in all roles and services and therefore does not automatically apply. If it is agreed that the arrangements are not working, then the employee / team should return to their official base or alternative arrangements put in place.</p> <p>If an individual wants to formalise the arrangement and work from home on a regular, ongoing basis (i.e. agree a permanent, contractual change), they should do so by making a request using the Flexible Working Procedure.</p>
1.2	<p>Hybrid and remote working arrangements should:</p> <ul style="list-style-type: none"> • Focus on results / outcomes and performance • Promote high levels of trust and autonomy amongst staff • Allow employees the opportunity to manage their work life balance more effectively • Utilise resources more effectively
1.3	<p>Line Managers have a primary responsibility for maintaining service effectiveness and quality. Arrangements for hybrid and remote working may support this, but may not be deemed appropriate if there are specific service-related grounds such as:</p> <ul style="list-style-type: none"> • burden of additional costs • detrimental effect on the service • inability to reorganise work among existing staff • detrimental impact on quality • detrimental impact on performance
1.4	<p>Factors that should be considered and discussed as part of the agreement process include:</p> <ul style="list-style-type: none"> • The suitability of the role / task and service specific needs. • The performance level of the individual member of staff and their ability to work away from their usual base and without regular supervision. For example, staff members who are subject to formal or informal conduct or capability proceedings may not normally be suitable for remote working arrangements, particularly when they require close supervision and coaching by their manager to make the necessary arrangements. However, there may be occasions when working remotely can help individuals improve their performance. Consideration should also be given to what support new members of staff need during their induction process.

Document Title: Working Remotely Guidelines	6 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

	<ul style="list-style-type: none"> • The suitability of the employee’s home for working remotely. • The impact on, and relationship with, other team members. • Whether home working is a reasonable adjustment for staff with a medical condition. <p>N.B. it may be possible for individuals or team members to work remotely for an odd day, even though they are required to work from base most of the time. This could apply for specific pieces of work, to complete mandatory training or to undertake CPD activities etc.</p>
1.5	<p>On occasions, where the role allows, it may be agreed that a member of staff can have reasonable “time out” during core hours in order to help with work-life balance arrangements (e.g. taking children to school or attend appointments). N.B. the expectation would be that if ‘time out’ is taken in this way, they will be accrued in advance or worked back to ensure contracted hours are worked in full.</p> <p>Working remotely should not be used as a substitute for childcare or care of other dependents. Employees working remotely who have dependents must ensure that they are able to fulfil the requirements of their post whilst working from home, by making adequate provision for the care of their dependents during working hours. For a more permanent agreement, a flexible working application would need to be made. A link to the flexible policy could be put in here.</p>
1.6	The usual reporting provisions relating to sickness absence and other reasons for not being able to work will apply in accordance with the appropriate UHB policies.
1.7	The UHB may, at its discretion, supply equipment such as a portable laptop or remote connection facilities to work securely from an individual’s own PC. This will involve accessing UHB servers securely using the authentication tools provided by the UHB. Any equipment provided will remain the property of the UHB which must be returned when it is no longer required for work purposes and/or when the staff member leaves or changes roles. All traces of original user are to be removed by IT.
1.8	Taking work home or to another base, where this involves transportation of personal or sensitive information, must only be done with the line manager’s approval and where appropriate safeguards for the information have been applied. Digital copies which are accessed through the secure UHB network should be used whenever possible.
1.9	<p>To work remotely an employee needs a working environment which offers:</p> <ul style="list-style-type: none"> • suitable “work” space which meets health and safety requirements, guidance for this is in the DSE procedure • adequate equipment including computer, broadband connection, telephone line, etc • freedom from interruptions and distractions • security and confidentiality
1.10	Employees must be available to attend Health Board premises with reasonable notice when required to do so to deal with a work-related matter or attend team meetings, training activities etc.
2	DEFINITIONS OF FLEXIBLE WORKING

Document Title: Working Remotely Guidelines	7 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

2.1	<p>Flexible working describes a type of working arrangement which gives a degree of flexibility on how long, where, when and at what times employees work. Flexible working aims to accommodate employee's personal needs and meet their unique requirements</p> <p>Agile working is the ability to work in the place and at the time most appropriate for the task in hand. While agile working and flexible working may be similar in how they achieve their aim, for example both approaches may allow an employee to work from home, flexible working focuses on the employee, while agile working is focused on the impacts on the business including performance and productivity. It may be a tool which can supplement or support a Flexible Working arrangement, but it is not a contractual change to an employee's terms and conditions. Some common traits of an agile working environment include things like hot desking, switching to an open plan office, removal of dedicated desks and establishing different locations for things like breaks, meetings and work. Agile working offers flexibility for staff that allows them to work in a way that suits them, provided the work happens.</p> <p>Working remotely is when employees work all or part of their working week at a location remote from their base. This can be at home or elsewhere. Working remotely can be a flexible working arrangement (e.g. if requested by the individual and agreed as a regular, ongoing way of working), but it can also be a form of agile working.</p> <p>Hybrid working is a mixture of remote working and working from a base.</p>
3	RESPONSIBILITIES
3.1	<p>Line managers are responsible for:</p> <ul style="list-style-type: none"> • Ensuring that agile working, including hybrid and remote working, is promoted and supported wherever possible. • Ensure hybrid or remote working requests are looked at on a case by case basis and encourage support and adapt duties where possible e.g reasonable adjustments for a disability • Consider if hybrid or remote working is an option for reasonable tailored adjustments and if this needs to be combined with flexible working or a phased return as per the Managing Attendance Policy • Considering the appropriateness of homeworking on a team and/or individual basis, ensuring that they know their staff and are able to take service, role and individual circumstances into account. • Ensuring that employees are supported in accessing appropriate equipment to undertake their role. • Ensuring that issues related to improving or maintaining productivity, quality and health, safety and security are considered and action taken to support employees in managing them. • Ensuring that communication is maintained with all employees and that they are encouraged to be part of a team. • Ensuring that homeworking (or any other form of agile working) is monitored through regular review, at least annually, such as appraisal, supervision, regular meetings and ad hoc checks. • Seeking advice and assistance from Health and Safety, Occupational Health and People Services Department, as appropriate. • Linking in with the E-Roster team to ensure Health Roster remains up to date with the correct information

Document Title: Working Remotely Guidelines	8 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

	<ul style="list-style-type: none"> • Ensuring that staff working from home have completed a self-assessment and DSE (Display Screen Equipment) assessment and have confirmed that they will ensure all work will be undertaken safely and securely. • Reinforcing the employee’s responsibility for confidentiality and securing of data in line with UHB IT and Governance policies. • Ensuring that arrangements for working remotely are agreed and put in writing, and placed on the personal file. • Ensuring that employees do not feel under pressure to be always available as a result of increasing technologies. <p>Employees are responsible for:</p> <ul style="list-style-type: none"> • Individual members of staff have a responsibility under the Health and Safety legislation for ensuring that their work is undertaken safely and securely and are responsible for undertaking a self-assessment (appendix 1). However, in order to support this, they can also request a risk assessment is undertaken through their line manager. • Understanding and adhering to these Guidelines, in particular their own responsibilities regarding health and safety, information governance and data security/confidentiality. • Agreeing home working arrangements with their line manager and letting their manager know if any issues arise which are related to their home working. • Being available and contactable during the agreed working hours and maintaining regular communication with their manager and other team members / colleagues. • Carrying out the required DSE assessments and home-working risk assessments. • Complying with all UHB policies and procedures in the same way they would be expected to if they were in their usual place of work. • Taking good care of any UHB supplied equipment for home / mobile working and reporting any damaged, lost or stolen equipment or data without delay. • Maintaining their work life balance and health, safety and wellbeing, seeking support if they have any concerns. This includes adhering to the Working Time Regulations with respect to weekly working hours and rest breaks. • Advising mortgage companies, insurers, landlords etc that they are working from home (making it clear that they are not running a business from home). • Managing their own welfare and working hours, understanding that they are not under pressure to be always available as a result of increasing technologies.
4	PROCEDURE FOR AGREEING REMOTE AND HYBRID WORKING
4.1	<p>The decision to allow or require an employee to work from home on an occasional, regular or, in rare circumstances, permanent basis may be instigated by the employee or the manager and wherever possible, it should be by mutual agreement.</p> <p>Working remotely will not be appropriate for all staff due to their personal circumstances, even where their role lends itself to remote working. A trial period may be agreed in order to gauge the suitability before any longer-term arrangements are made.</p>

Document Title: Working Remotely Guidelines	9 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

4.2	<p>Where the request for remote working is instigated by the manager, this must be discussed with the employee/s and there must be consideration of their personal circumstances and home environment.</p> <p>Where it is not mutually agreed, it may be necessary to undertake a period of consultation in relation to this and advice should be sought from People and Culture Department, with the option of support from Trade Union representatives to seek early resolution.</p>
4.3	<p>Where an individual requests to work from home to meet their own personal circumstances, they must complete a flexible working application and submit this to their line manager for consideration in line with the Flexible Working Procedure.</p> <p>The line manager will be responsible for considering applications to work from home in a fair and consistent manner, taking into account the potential impact on the service. It is our Policy to view any requests for homeworking in a positive light and they will, wherever possible and practicable, be supported.</p>
5	MANAGEMENT OF EMPLOYEES WHO WORK REMOTELY
5.1	<p>Working from home does not suit everyone due to various different reasons the health and wellbeing of all employees is paramount and managers should assure themselves that home working does not have a detrimental impact on the health and wellbeing of their staff. Managers should also ensure that staff are aware of the resources available to support them.</p>
5.2	<p>Clear communication systems with employees who work from home are just as important, if not more so, as with those who are site/office based. This requires a more proactive approach to maintain team spirit and cohesion and to ensure that all members of the team remain in contact and engaged.</p> <p>To promote this, managers should discuss and agree how communication will be conducted, including how contact will be maintained and how frequently.</p>
5.3	<p>Performance Management</p> <p>Clear work objectives with measurable outputs must be established and documented for all staff, whether they work remotely or not. These objectives should be reviewed through regular one- to-one or team meetings.</p> <p>Employees who work from home must have comparable induction, performance management, access to learning and development, career development opportunities and team events as other UHB employees.</p>
5.4	<p>Appraisal and Training</p> <p>All employees should have an annual appraisal and be provided with equal access to training opportunities and homeworking should not be a barrier to this. It is recommended that appraisals and any potentially difficult conversations should be conducted face to face, wherever possible.</p>

Document Title: Working Remotely Guidelines	10 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

	All employees are required to complete the required statutory and mandatory training appropriate to their role. This may include face- to- face training which cannot be undertaken remotely.
5.5	Career progression is encouraged within Cardiff and Vale UHB and homeworking or other agile working arrangements adopted by individuals will not be a barrier to promotion or career progression.
5.6	<p>Managing Attendance at Work</p> <p>Any employee who is unfit for work as a result of sickness must report to their line manager and provide appropriate certification as set out in the Managing Attendance at Work Policy.</p> <p>Managers must conduct sickness interviews and return to work interviews with all employees and manage sickness absence in accordance with the Managing Attendance at Work Policy.</p> <p>Working remotely is not an alternative to sickness absence i.e. if an employee is not fit to work due to sickness, they are not fit to work; even from home. However, working remotely can be a useful aid e.g. in managing long term conditions; or where an employee may be fit for work, but travelling to work is not possible. In such circumstances working from home for a prescribed period of time may be considered as a reasonable or tailored adjustment. Occupational Health advice may be sought if it is thought that this will be helpful, but it is not required, and managers and staff are encouraged to agree these adjustments together. Seeking Occupational Health advice should not cause a delay in implementing appropriate adjustments and if necessary interim arrangements can be put into place.</p>
5.7	<p>Working Hours</p> <p>The Flexible Working Procedure will apply to staff who work agilely / at home in the same way as it does to office/site-based staff. Any flexible working pattern should be considered as part of the initial application or agreement and any subsequent requests to change those arrangements should be made according to the existing procedures.</p> <p>During agreed working hours, the employee is expected to be available to attend meetings (in-person if necessary), return calls, answer emails and provide information in a timely manner.</p> <p>There may be occasions when a staff member wishes to work outside their contracted hours if this is mutually agreed by the line manager no unsocial/enhanced payments will be made in relation to these adjusted hours.</p> <p>Arrangements for working more than the normal weekly contracted hours will be by agreement with the line manager. Payment for any additional hours will be in accordance with the appropriate National Terms and Conditions of Service.</p>
6	HEALTH, SAFETY AND SECURITY
6.1	The Health and Safety at Work Act 1974 requires all employers to ensure, as far as is 'reasonably practicable', the health, safety and welfare at work of employees. This duty is extended to employees working at home. This also places an obligation on staff working from home or remotely to ensure they take reasonable care not to expose themselves, or others, to risks to their health and safety.

Document Title: Working Remotely Guidelines	11 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

6.2	<p>If a home working arrangement is accepted in principle, a self-assessment of the suitability of the home environment must be completed by the employee (appendix 1). If this assessment identifies any particular risks, it is the responsibility of the line manager and employee to discuss ways in which the risks may be minimised or eliminated. In some circumstances it may be necessary to seek further advice from the Health and Safety Department. Support is also available from the Occupational Health Physiotherapy Service for advice on musculoskeletal issues.</p> <p>Before starting to work remotely, the member of staff must also complete a work station assessment of the proposed homeworking area and equipment using the UHB Display Screen Equipment Risk Assessment. The option of requesting a home-based risk assessment to be conducted jointly with the line manager is also available to staff who have concerns.</p> <p>If risks have been identified and cannot be eliminated, it may not be possible to agree that working remotely is a suitable option.</p>
6.3	<p>The equipment used by employees to enable them to work remotely (whether owned by the UHB or provided by themselves) must be safe to use, fit for purpose and not give rise to any health and safety risks. The equipment should be maintained in efficient working order and in good repair.</p> <p>The UHB will be responsible for maintaining UHB equipment. Any concerns regarding UHB equipment must be immediately raised with the line manager.</p> <p>Equipment provided by the UHB remains the property of the UHB and must not be used by other members of the household.</p> <p>If an individual requires specific equipment when working on-site, they may also need that equipment when they are working remotely e.g. a special chair. Such equipment remains the property of the UHB and must be returned if the remote working arrangements come to an end.</p>
6.4	<p>Employees must ensure that all equipment, documentation and data owned by the UHB is kept securely, including whilst in transit.</p>
6.5	<p>If an incident occurs whilst working from home, the member of staff must report the incident in line with the UHBs incident reporting procedures (Datix).</p>
6.6	<p>The use of a home PC, personal lap top or other device is not permitted for any work that contains patient or staff identifiers or is of a confidential or sensitive nature, unless it is via the UHB's secure remote access facility. Otherwise, residual information may still be stored on the device which would be accessible by others who have access to the device and will also need to be disposed of in line with the IT Security Policy.</p>
6.7	<p>With regards to personal safety and security, employees should not release their home address except to their line manager. If a contact number is required and a mobile phone has not been provided for the employee to use at home, the office number should be given. Other employees must not give out the home worker's address or personal telephone number. It is the manager's responsibility to ensure that this is clear to all employees.</p> <p>All meetings should take place virtually or on UHB premises. Meetings with colleagues, representatives from other agencies or patients must not take place at home.</p>

Document Title: Working Remotely Guidelines	12 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

	Managers must be alert to any potential safeguarding issues that may affect employees and consider any potential safeguarding implications when dealing with homeworkers and requests to work from home. Further advice can be sought from People Services Department or UHB Safeguarding Team.
7	INFORMATION GOVERNANCE / CONFIDENTIALITY
7.1	<p>Employees who work remotely are required to comply with all IT and information security, confidentiality and information governance policies, procedures and requirements.</p> <p>Employees should be aware of their responsibilities under the UK GDPR & Data Protection Act 2018 which apply whether working in an office or at home. Personal identifiable, confidential or sensitive information and material should not be removed from UHB premises without prior approval from the Information Governance Department. Please contact Cav.ig.Dept@wales.nhs.uk for advice.</p> <p>If approved, all information must be kept secure at all times.</p> <p>The employee will have a direct responsibility for all UHB information / material held at their home and must ensure that it is not accessible to non-authorised people, including other members of their household. Confidential waste should not be disposed of at home, but should be destroyed via UHB facilities.</p> <p>The employee must make all reasonable efforts to ensure that confidential telephone conversations or virtual meetings are not overheard by others in the household.</p> <p>Employees who transport equipment (e.g. laptops) and/or person identifiable, confidential and sensitive information should not leave this in an unattended vehicle at any time.</p> <p>All employees should ensure they are up to date with their Information Governance Training. Any breach of confidentiality should be reported via DATIX, this would include the loss or theft of IT equipment containing confidential and / or person identifiable data.</p> <p>It is expected that when working outside of a UHB site, staff will take all reasonable precautions to safeguard data. Failures to safeguard data may be dealt with under the Disciplinary Policy.</p>
8	INSURANCE
8.1	<p>The UHBs existing Welsh Risk Pool indemnity will continue to apply to cover the homeworker in the same way as if they were at work on site. It will also provide cover for any UHB equipment located at the home of the employee, as long as suitable agreed arrangements are in place.</p> <p>It is the responsibility of the employee to provide adequate home buildings and contents insurance. The UHB will not accept liability for damage caused to the home or its contents.</p> <p>Whilst working from home is unlikely to impact insurance, employees should make it clear to their landlords/mortgage provider that they are working from home, not running a business from home, and that no work visitors or clients will visit the home (the only possible exception being the line manager or other UHB staff for maintenance of UHB provided equipment) to ensure</p>

Document Title: Working Remotely Guidelines	13 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

	<p>that that are no terms or conditions, leases or covenants that prevent them from working at home.</p> <p>Any additional expense incurred by the employee because of an increase in insurance premiums would be considered to be the employee's responsibility.</p>
9	<p>EXPENSES</p> <p>Employees who work remotely will only receive travel expenses for those miles travelled which are in excess of the distance they would normally travel from their home to their office/work base.</p> <p>Stationery should be ordered through the usual channels and collected from Health Board premises.</p> <p>For any members of staff moving to remote working, any additional household expenses incurred whilst working from home should be offset by reduced travel costs and the Health Board is not planning to make any contribution to these costs. However, members of staff may be able to claim tax relief for additional household costs if working at home if it was not a choice of the employee to work from home.</p> <p>To make a claim or to check eligibility, please visit: Claim tax relief for your job expenses: Working from home - GOV.UK</p>



Personal Details	
Name:	
Department:	
Directorate:	
Post:	
ESR Number	
Manager:	
Home Address	
Date of assessment	

HOME WORKING ENVIRONMENT/ WORKING PRACTICES		
Question	Yes/No	Comments
Has a Display Screen Equipment assessment been completed?		
Do you have a suitable desk or table and chair that you can work from?		
Is all of the portable electrical equipment which is used for work free from obvious damage and defects?		
Are the electrical sockets which are used to supply work equipment overloaded?		
Are all electrical cables correctly routed so they do not pose a trip hazard?		
Is the work area tidy and waste paper disposed of regularly? (consider confidential papers which may need to be shredded)		
Is there a clear and unobstructed escape route for you and any other occupants in case of emergencies e.g. fire?		
Are there suitable smoke detectors installed in the home and are these regularly tested?		
Are the floors and floor coverings in good condition and do not present a trip hazard?		
Are the floors and traffic routes kept free from obstructions e.g. paper, work equipment etc.		
Do you have adequate lighting to undertake tasks comfortably?		
Are work items, papers, files etc. stored appropriately so they do not pose a risk?		
Are procedures in place to ensure that family members or others who are in the home do not have access to confidential information e.g. not being overheard while on the phone or access to written or electronic information?		
Are the computer and confidential files stored appropriately when not in use?		
Have you completed the Mandatory Manual Handling training?		
Do you carry out any significant manual handling activities associated with your home working?		

Document Title: Working Remotely Guidelines	15 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

If significant manual handling is involved, has a manual handling risk assessment been carried out?		
Is there suitable and sufficient heating, lighting and ventilation?		
Is homeworking permitted in the terms of your buildings and contents insurance.		
Is homeworking permitted in the terms of your tenancy, mortgage provider, insurer?		
Have you read and understood the regulations around data security/email use as set out in the relevant UHB policies.		
Any other comments or concerns you have regarding your working environment, please state here:		

Please send the completed checklist to your Line Manager,

Signature:

Job Title:

Date:

For Management use;

DETAILS OF EQUIPMENT PROVIDED BY THE HEALTH BOARD:	
Equipment	Serial number

Remedial/Mitigating Actions taken following the self assessment:

- 1.
- 2.
- 3.

Further Risk Assessment required- YES/NO (If YES, please contact the Health & Safety Manager)

Action Plan required: YES/NO

THIS SELF-ASSESSMENT HEALTH AND SAFETY CHECK MUST BE UNDERTAKEN ON AN ANNUAL BASIS

Document Title: Working Remotely Guidelines	16 of 16	Approval Date: 27.09.23
Reference Number: UHB 458		Next Review Date: 27.09.26
Version Number: 3		Date of Publication: 23.11.23
Approved By: EPSG Chairs Action		

AGILE FRAMEWORK FLOWCHART

