



Remote Worker Fact Sheet and Checklist

Remote work may be an option or, **in times of emergency**, a requirement. The following checklist contain some items to consider in order to create a remote work plan. Following the checklist is an article on remote work and security and trade secret/confidentiality concerns.

Essential vs. Non-Essential Personnel:

- ☐ Identify roles critical to business operations that cannot be done remotely
- ☐ Identify roles that require face-to-face customer interaction or direct and constant supervision and cannot be done remotely

Equipment and Technology:

- ☐ Inventory necessary equipment employees will need to perform job remotely (e.g. laptops, docking stations, monitors, phones, printers, office supplies).
- ☐ Assess adequacy of IT support to assist employees working remotely
- ☐ Address security, privacy and confidentiality concerns and protocols (See additional information at end of checklist)
- ☐ Evaluate communication platforms such as Zoom, Go To Meeting, Slack, Skype (See Managing Remote Work, below)

Preparedness:

- ☐ Have employees prepare in order to begin remote work at a moment's notice. For example, ask employees to bring home any necessary materials at the end of the day in case the need for remote work should arise (e.g., laptop, working documents)
- ☐ Take time now to digitize any relevant physical documents to make remote working easier
- ☐ If allowed, have employees screen shot any physical calendars, sticky notes, whiteboards or other physical documentation they may need.

Wage and Hour Issues:

- ☐ Consider all issues relating to non-exempt workers and remote work, including:
 - "After hours" work – set a daily schedule to avoid overtime issues and require pre-approval of overtime
 - Off-the-clock work – enforce timekeeping and no off-the-clock work policies
 - Meal and rest breaks must be taken. Managers need to confirm.
- ☐ Best technology for tracking time and productivity.
- ☐ Final pay is paid at employee's primary work location
 - If you terminate a remote employee, you must be prepared to deliver the final paycheck at the moment the employee is notified of the termination.

Reimbursement of Expenses:

- ☐ Reimbursement for reasonable and necessary expenditures and losses is required even if remote worker would have incurred anyway
 - Cell phones and plans
 - Laptop
 - Internet access
 - Other equipment, supplies and furniture
- ☐ Reimbursement options
 - Pay costs that allow employee to work at home to employers satisfaction (higher speed internet than employer needs paid by employee)

- Allocate costs between business and personal use
- Provide a remote work allowance (actual expenses over allowance still must be paid)
- Travel time to and from office for meetings generally paid

Managing Remote Work

There are a number of steps you can take to ensure that the remote work time (whether temporary or permanent) goes well for your workers and for your organization.

- Designated daily or weekly communication type and method
 - Communications platform that all workers will be required to participate in for group meetings. It could be thorough a phone conference, email, instant messaging, Slack, Go To Meeting, Zoom, and/or some other designated tool.
 - Create agendas for team meetings as well as minute meetings to help solidify communications.
- Have each manager explain their preferred method of communication. Don't rely too heavily on email or text. Call your employees or schedule video conferences.
- Provide clear goals, project deadlines and expectations.
- Provide feedback.
- Don't micromanage – if you don't do it while they are in the office, don't do it while remote. Track overall productivity and goals instead of minute by minute activity.
- Watch for overwork, as there is less of a clear boundary between work and home. Manage burnout and stress and use overtime policies requiring prior approval of overtime for non-exempt employees.
- Consider digital “social” time now and again – you can play a game at the end of the meeting, do some stretching, or send everyone a muffin basket before the morning meeting starts.

Checklist for a Remote Work Policy

Your policy should lay out the expectations you have for your workers. If this is a temporary situation necessitated by an emergency (such as a public health emergency or wildfires), additional considerations may apply such as whether work at home is *mandatory* vs. *voluntary*. CEA provides a [Sample Remote Work Policy](#).

The following are some key elements of any remote work policy:

- Need to comply with all employer policies, practices and instructions.
- The work schedule and required times of availability, including meal and rest breaks (for non-exempt). Prohibit off-the-clock work and overtime without prior approval.
- Procedures and policy for checking in and best contact method.
- Participation in regularly scheduled meetings.
- How communication with staff will be handled.
- How meetings with customers, clients or other third-parties will be handled (and any restrictions on meeting size based on public health issues such as coronavirus).
- How expenses will be handled and any employee documentation requirements.
- Employer provided equipment and that employer maintains control of such property.
- Right to monitor equipment
- Security, privacy and confidentiality policies (see below article), including whether work can be done at a coffee shop for instance due to these concerns.
- Maintaining a safe work environment.