

Remote Work Policy Checklist

Written By:

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Section 1: Introduction

Company Policy:

- **Summary** - Short but comprehensive description of what your company's general remote work policy is.
- **History** - Account of how long remote work has been permitted in your company, what or who is responsible for initiating the change, how it has benefited the business, and how it has evolved over time to elicit maximum benefits for both the company and the workforce.
- **Definitions and References** - Are there any unique terms, documents, or processes referred to in company culture or in this policy that may be new to a worker or manager? If so, provide more information.
- **Directory** - Where can workers find more information about their teammates, including role title, location, time zone, working hours, and communication preferences?

Agreement Protocol:

- **Eligibility** - Are there certain criteria that must be met by the worker in order to qualify for a remote work agreement, such as tenure, department, or management level?
- **Application** - Outline the process for requesting a remote work agreement. Who should the application be submitted to? Who is the decision maker that gives approval? Are there other factors outside of previously-listed eligibility criteria considered before giving approval? How does your company prevent manager bias (or "department discrimination"), in which some teams are or are not allowed to work remotely depending on the opinion of the manager?
- **Termination** - What conditions (for either the employer or the employee) will justify the termination of the remote work agreement, or the employment of the worker?
- **Flexibility** - What procedure should a worker, co-worker, or manager follow if an adjustment is needed to the terms listed in this policy?

Section 2: Terms

Performance Expectations:

- **Objectives & Key Results** – What are the primary goals of the company, team, and role? (Understanding these can support critical thinking, intrinsic motivation, and proactivity in location-independent workers.)
- **Key Performance Indicators** – List what criteria and applications will be used to measure the productivity and success of the worker. What evidence and data will the manager have (without physical supervision) that the employee is staying on task and will be on track to meet deadlines?
- **Responsiveness** – What are the expected response times for the primary communication channels of the team (ie: Slack, email, calendar invites, etc.). In other words, how quickly can a worker expect to receive assistance when requested, and when should a manager start to be worried that the worker is not on task or has a problem and needs additional support?
- **Project Management System** – Outline the tools and rituals that are used to track virtual assignments, files, and deadlines. Include clear descriptions of the responsibilities and expectations for each member that will ensure accurate reporting.

Schedule:

- **Rituals** – Mandatory meetings and procedures that facilitate team collaboration, reporting, and updates, such as daily reporting, weekly standups, and annual retreats.
- **On-Site Requirements** – Are there any dates, times, or tasks that the worker must travel to the office or to another colocated space for? Are these events recurring or single instances?
- **Working Schedule** – What hours each day or week should the worker be active and available? (In contrast to hours when they can work autonomously, regardless of the activity status of their teammates.) If the same work hours will be enforced for the entire team, what time zone will those hours be based in?
- **Worksite Closures** – Description of the paid time off policy for remote workers, including a list of days or times that usual business operations will be closed (such as holidays or industry events).
- **Flexibility** – What procedure should a worker, co-worker, or manager follow if an adjustment is needed to the terms listed in this policy?



Equipment Expenses:

- **Required Tools** – A checklist of equipment that the worker will be required to have in their offsite work area, such as laptop, webcam, minimum internet speed, and headset. Also outline the long-term requirements for upgrading and maintaining each tool.
- **Information Security** – What practices and security training does your company require to keep confidential information safe? Examples include anti-viral software, firewalls, encryption tools, 2-factor authentication, password managers, remote-wipe apps, nondisclosure agreements, and virtual private networks. Be sure to link to instructions for implementation and maintenance.

- **Expenses** – List which expenses will be provided by the employer, and which will be the responsibility of the worker, including office supplies, internet service, office furniture, transportation, event registration, software accounts, etc.
- **Ownership** – Clarify which resources belong to the employee and which are considered company assets. At the conclusion of employment, who keeps what?

Working Environment:

- **Environment** – Description of the working conditions that are culturally-accepted in your company, such as “webcam-on” meetings, dependent care, or background noise control.
- **Health & Safety** – List of conditions that must be enforced in any off site work location to ensure the short- and long-term safety of the worker, including ergonomic equipment, break schedule, headset specifications, and tripping hazards.
- **Client Confidentiality** – Are there any procedures that should be followed physically or digitally to protect sensitive information? (In addition to standard information security requirements?) For example, does the worker’s home office need to have a locked door for HIPPA compliance?
- **Liability** – Details about the company’s worker’s compensation policy for injuries incurred in a home or mobile office, or coverage of company assets if damaged by household or coworking space members.

Section 3: Support

Problem Solving Resources:

- **Accessibility** – Where can digital company resources (such as HR paperwork, company handbook, or project files) be virtually accessed? Who is the correct point of contact if a certain resource cannot be located?
- **Tech Support** – Process that remote employees should follow to troubleshoot equipment or software malfunctions. Options could include the contact information of an internal consultant, or instructions to find and pay for a local specialist.
- **Notices and Memos** – How will company leadership notify offsite employees of news, warnings, or updates at the same time that onsite workers are informed? What steps are required for remote workers to acknowledge receipt?
- **Disability Accommodation** – If the employee will (or may) work offsite due to a disability or nontraditional circumstance, describe what adaptations will be made to their schedule or workspace in consideration of their unique needs

Engagement:

- **Socialization** – Are there any resources provided for remote workers to prevent social isolation, such as employee resource groups, virtual coffee breaks, or annual retreats? Is participation optional or required?
- **Point of Contact** – Assign at least one mentor (other than the direct supervisor) to be an easily-accessible source of information for questions, concerns, and feedback.
- **Communication Channels** – Clarify which channel should be used for various types of communication. For example, client updates should be distributed via email, non-urgent comments should be posted in the project management system or as a comment in a file, and urgent questions should be asked with a direct mention in Slack.
- **Feedback** – Description of the procedure for virtually providing peer feedback, filing complaints, or sharing sensitive information in a way that attention to the concern will be guaranteed by leadership without negative consequence to the employee.

Worker Support:

- **Fair Labor & Discrimination** – Legal assurance (and accountability) that the worker will not be laid off, overlooked, undervalued, or terminated based on their offsite status.
- **Promotion Consideration** – Description of how the company's evaluation process equally analyzes the work produced of all workers and prevents "out of sight, out of mind" bias.
- **Local Employment Laws** – Ensure awareness of both employer and employee of what laws and policies are uniquely enforced in the worker's region, such as union membership, paid family leave, and final paychecks.
- **Learning & Development** – Outline of opportunities that the employer provides or requires for workers to encourage career growth, including continuing education, personal roadmap meetings with HR, promotion frequency, and remote work certification courses.

About distribute CONSULTING



Distribute Consulting is the world's foremost thought leader and consulting firm specializing exclusively in remote work. Our team of international telework expert help businesses start, strengthen, and leverage virtual workforces to solve corporate and socioeconomic concerns. Through webinars, sprints, and consultations, we eliminate virtual worker discrimination, prevent policy retraction, increase remote job accessibility, train distributed leaders, and design economic initiatives.

**You're working remotely,
but are you working remotely well?**

SCHEDULE ASSESMENT

About ActivTrak

ActivTrak is a workforce productivity and analytics software company that helps organizations understand how people work, whether in office or remote. Our cloud-based user activity monitoring platform provides contextual data and insights that enable mid-market enterprises to be more productive, secure, and compliant. With more than 5,000 customers and over 100,000 users of its Free version, ActivTrak's award-winning solution can be configured in minutes to provide immediate visibility and reporting.

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