

# Home and Agile Working Guidance

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<b>Issue Date:</b>	June 2024	<b>Review Date:</b>	June 2026
<b>Location of Staff applicable to</b>	Trustwide	<b>Staff groups applicable to</b>	All permanent or fixed term employees All Sites
<b>Equality, Diversity And Human Right Statement</b>	The Trust is committed to an environment that promotes equality and embraces diversity in its performance both as a service provider and employer. It will adhere to legal and performance requirements and will mainstream Equality, Diversity and Human Rights principles through its policies, procedures, service development and engagement processes. This procedure should be implemented with due regard to this commitment.		
<b>To be read In conjunction with / Associated Documents:</b>	<ul style="list-style-type: none"> <li>▪ Flexible Working Policy</li> <li>▪ E-Roster Policy</li> <li>▪ Health and Safety Policy</li> <li>▪ Sickness and Wellbeing Policy</li> </ul>	<b>Information Classification Label</b>	<input type="checkbox"/> <b>NHS Confidential</b> <input type="checkbox"/> <b>NHS Protect</b> <input type="checkbox"/> <b>Unclassified</b>
<b>Access to Information</b>	To access this document in another language or format please contact the policy author.		

## Document Change History:

Version number	Page	Changes made with rationale and impact on practice	Date
1		New Standard Operating Procedure	May 2020
2	Section 3.12 pg 11 Appendix 1	Health and Safety advice has been updated to confirm that temporary home workers need to complete a DSE Health and Safety Assessment only. Appendix 1 has been updated to reflect this change.	August 2020
3		Updated to reflect national restrictions from 5 November 2020	5 November 2020
4		Updated to remove reference to COVID – 19 regulations and to be used in conjunction with the Flexible Working Policy.  Updated to reflect the People Promise Agenda regarding flexible working.  Incorporated guidance regarding agile working.  Updated the risk assessment within appendices.	June 2024

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## 1. Purpose

LUHFT recognises the benefits that agile and homeworking can bring to colleagues to maximise their performance and productivity, whilst giving them greater choice in how and where their work can be carried out. This guidance will help managers to use good practice principles when helping teams to use agile/ home working.

Agile and home working are a type of flexible working and should be considered in conjunction with the [Flexible Working Policy](#). This Guide does not cover requests from employees that affect their contract of employment. Formal flexible working requests should be considered in line with the [Flexible Working Policy](#).

The following supplementary guidance should be considered to support managers' considerations for agile and home working and help them to balance the colleagues' work-life balance, maintaining service needs and the experience of patients and their communities.

## 2. Definitions

**Agile working** is where an employee's role can be carried out across multiple sites within LUFHT, which may include at home, and their contractual base is at one of the work locations.

**Home working** allows employees to undertake their normal duties from their home for part of their contractual working hours and will be suitable in areas where the service can be safely delivered both remotely and on site.

## 3. Agile and Home Working Guidance

### 3.1 Benefits Agile and Home Working

There are a number of benefits for employees to work from home which include but are not limited to:

- Greater flexibility
- Less interruptions
- Reduced travel costs
- Increased productivity
- Better staff engagement and retention
- Reduced travel and therefore reduced carbon footprint

The Trust recognises that agile and home working will cover many different circumstances and this procedure will not cover all eventualities.

### 3.2 Assessing Suitability for Agile and Home Working

When assessing the suitability of agile and home working, managers should consider the following triangle and aiming to strike a positive balance between:

- Patient/ service user and staff experience.
- Service delivery
- Work-life balance of colleagues

Agile and Home working should only be considered when the manager is clear that the service needs can be delivered. Managers can consider a combination of homeworking and on-site work when assessing their business model needs.



When exploring these options, it's helpful to consider the following for the colleagues work:

- **When** the work needs to be done
- **Where** the work needs to be done
- **How** the work is planned and undertaken

In addition to this, managers may want to consider the specifics:

1. Reviewing the deliverables for their team, establishing what aspects could be delivered remotely and what require on site deliver and by whom, including;
  - a. Whether or not the business model for the service can be achieved with homeworking,
  - b. Whether or not it is appropriate for an individual to work from home part of the time,
  - c. Whether or not it is appropriate for a team to work from home part of the time, and whether an informal rota could comply
  - d. Review **Appendix 3** flowchart to determine suitability for home working
  - e. Ensuring that effective information security arrangements are in place and agreed with the employee;
  - f. Agreeing the parameters, deliverables and objectives for the employee whilst they are working from home – **appendix 1** or **appendix 2**.
  - g. Ensuring that there is no overall increase in the workload of colleagues not working from home because of the employee working from home.
2. Employees should be able to attend their required site base when needed whenever necessary, including part way through the day.
3. IT requirements for working from home and whether access to equipment can be supported (provision of laptops and supportive equipment etc).
4. Employees remain responsible for their car parking payments when attending Trust sites

### **3.3 Request for Agile and Home working Supported.**

If, following consideration of all the points above, Agile or homeworking the line manager is able to support agile and home working options, appropriate, the line manager will need to agree the parameters for working from home. All agile and homeworking arrangements should be agreed in writing.

### **3.4 Agile and Home working may not be suitable**

Where agile or home working cannot be agreed, the line manager will explore other working arrangements and alternatives in line with the [Flexible Working Policy](#).

If a request for agile / home working cannot be support, the employee should refer to the appeals section of the [Flexible Working Policy](#).

### **3.5 Home Working Management**

#### **3.5.1 Hours of Work**

It is expected that homeworking should not exceed a reasonable proportion of the employee's weekly contracted hours, unless there are exceptional circumstances. The agreement should allow for on-site attendance at a designated base, to enable them to, for example, attend team meetings; meet with staff they manage and/or participate in developmental activities.

The employee will be required to fulfil their contracted hours during their working day.

Employees should take care not to work excessive hours, looking after their wellbeing and work life balance.

Employees should remain flexible in their approach to agile and home working, as ' adhoc requests will not form a permanent change to your working patterns and should continue to accommodate service needs.

#### **3.5.2 Agreeing Objectives and Deliverables**

To ensure the effectiveness of the home working arrangement the employee and their line manager will need to agree a set of objectives and deliverables. These will form the basis of a work plan with measurable outcomes and defined timescales. Any subsequent changes will be communicated by the manager to the employee who is required to confirm the changes as soon as possible via email.

The Homeworking Agreement will include;

- Hours and pattern of work
- What responsibilities/areas of focus during the homeworking period
- Objectives and deliverables to be achieved during the homeworking period
- Method for measuring and monitoring effectiveness of home working – considering the employee's circumstances where necessary
- Method of communication, including mobile numbers/Microsoft teams/face to face meetings when requested

- Equipment will need to be provided to facilitate home working and this will be arranged by the department
- Any other issues which need to be taken into account

Home working by its very nature relies heavily on the use of information technology. It is vital therefore that an employee working from home is proficient in the use of IT to ensure their effectiveness. The employee and line manager will need to discuss and assess the IT requirements and identify whether any training needs exist.

It is really important that managers provide clear expectations with staff. Changing to homeworking may be a challenge for many managers and employees, particularly if they're used to working together face-to-face.

Employers and managers should make sure that everyone working from home knows what's expected of them.

Managers must also consider:

- how work-life balance will be managed, for example taking regular breaks and switching off from work at the end of the day
- clear guidance around storing information and data protection
- who employees should contact if they have any problems or their circumstances change

### **3.5.3 Caring Responsibilities**

Employees should not normally have the role of principal carer while working from home, however, in certain circumstances it may be appropriate provided this does not present any risk to the person being cared for and the line manager has approved it.

## **3.6 Wellbeing and Sickness Absence**

If an employee is unfit for duty on a scheduled 'working from home day', the normal rules governing management and reporting of sickness absence will apply for any home working arrangement. It is particularly important that staff who become ill during a period of home working should notify their line manager as soon as possible. This will be managed in line with the [Wellbeing and Sickness Policy](#).

### **3.6.1 Health, Wellbeing and Support for Staff**

It is essential that line managers ensure they consider staff health and wellbeing. Additional support is available for staff for their psychological wellbeing and managers must ensure this is shared with all staff during this time.

While remote work offers flexibility and autonomy, it's essential to address the negative aspects which may arise from home working to ensure the well-being and productivity of remote workers. Implementing strategies to mitigate these challenges, such as fostering virtual social connections, establishing clear boundaries, and providing support for ergonomic setups, can help create a more positive remote work experience. Further support is available here:

<https://staffhub.liverpoolft.nhs.uk/working-with-us/homeworking.htm>

Employee's working from home are able to access the health and wellbeing intranet pages on the Staff Hub which provide information on management of physical health, mental health, financial health and working life.

### **3.8 Confidentiality**

All employees working from home are subject to the provisions of Data Protection, the Trusts IT Security Policy and Acceptable Use Policy.

If employees are working on information of a sensitive or confidential nature, lockable storage facilities should be used. Any printing of sensitive information no longer required should be disposed as confidential waste not through household waste.

Employees have a duty to take reasonable care of Trust equipment whilst it is in their home and ensure that it is not exposed to any avoidable risks.

Consideration will also need to be given to storage of confidential information in the staff members home and the security of such documents.

Employees will be held responsible for the loss or damage to equipment where requirements of the Security Policy have not been observed. This may also be dealt with under the Disciplinary Procedure.

### **3.9 Working Time Directive**

Home workers have a responsibility to abide by the provisions of the Working Time Regulations 1998. The Working Time Regulations advise that staff should not work in excess of 48 hours per week unless they have signed an opt out form.

The working time regulations advise that staff should ensure that they take a break of 20 minutes in every 6 hours shift however, the Trust's Breaks Policy has been extended to incorporate a 30 minutes break every 6 hours worked and staff working 12 hours or more should ensure they have an hour break.

Average working hours are calculated over a 'reference' period which is normally 17 weeks. This means that staff can work more than 48 hours one week, as long as the average over 17 weeks is less than 48 hours a week. The reference period has been extended to 26 weeks for the duration of the pandemic.

### **3.10 Display Screen Equipment**

All Display Screen Equipment (DSE) users need to complete a DSE self-assessment. This will be the responsibility of the employee to complete, and the employer is responsible for implemented changes and ensuring that suitable equipment is provided to enable the home worker to complete their role without detriment to their health.

There should be no increased risk from DSE i.e. computers, laptops etc. for those



working at home temporarily.

The DSE assessment located at appendix 1 should be completed to assist employees setting up their workstation at home. Employees should make adjustments to their workstation at home in line with the guidance on the checklist and should return a completed copy to their line manager to keep on record.

Other simple steps you can take to reduce the risks from display screen work:

- Breaking up long spells of DSE work with rest breaks (at least 5 minutes every hour) or changes in activity
- avoiding awkward, static postures by regularly changing position
- getting up and moving or doing stretching exercises  
avoiding eye fatigue by changing focus or blinking from time to time
- The following intranet page provides all required support and information to ensure your health and wellbeing is supported while using DSE.  
<https://staffhub.liverpoolft.nhs.uk/working-with-us/display-screen-equipment.htm>

For employees with underlying health issues which require them to have specialist equipment in work, managers should try to meet those needs where possible. The employee may require a referral to the occupational therapy service who can assist with advice and adjustments. The referral should be submitted via the cohort management referral system. The employee should also be encouraged to refer to access to work who will be able to assist with adaptive equipment. If referred within 6 weeks of employment the full cost will be covered and if after 6 weeks the trust will pay the first £1000 and Access to work will fund the remaining. Advice should be taken from the IT Department about the use of Trust equipment at home.

### **3.15 Further Advice and Support**

For further advice and support on Lone/Home Working please contact the Health and Safety Department Helpdesk on 0151 529 6597 or [HealthandSafety@liverpoolft.nhs.uk](mailto:HealthandSafety@liverpoolft.nhs.uk) – the helpdesk covers all sites.

The Occupational Health team is available 8.30am to 4.30pm 7 days a week.

There is also a dedicated NHS helpline which will provide psychological support to those in need. Anyone requiring further help will be signposted to other services ranging from practical and financial assistance through to specialist bereavement and psychological therapy.

### **3.16 Records**

Any risk assessments, agreements or documents/records relating to homeworking, must be stored confidentially within the electronic personnel file held by Workforce or locally by the senior manager within confidential files.

## **4. Exceptions**

There are no exceptions under this guidance.

## **5. Training**

The Business HR Team can provide advice and guidance to all staff and managers across the Trust in relation to the application this policy.

## **Appendices**

### **Appendix 1**

**PART 2: Homeworking Arrangements (to be completed by Manager)**

<b>Section A: Job Role</b>	
Provide Brief Summary of Roles and Responsibilities	<b>Information (to be completed by Employee)</b>
	Employee Number:

**Section B: Job Plan**

Hours and pattern of Work	Department/ Care Group/ Ward:
Working Responsibilities/areas of focus	<b>Homeworking</b>
	<input type="checkbox"/> Yes <input type="checkbox"/> No      If yes, what date
Objectives/deliverables to be achieved during home working period	
Objectives Achieved:	<input type="checkbox"/> Yes <input type="checkbox"/> No (If no' please explain the reasons why):
Work Plan for any outstanding objectives:	If 'no' please explain the reasons why:
Equipment Provided to facilitate home working	
If reasonable adjustments have been made, provide further details:	

Item	Action Required
<b>Section C: General Working Environment - Environment</b>	
Do you have good enough lighting, either general room lighting or local task lighting?	
If windows cause glare, can you close blinds?	
Is hearing and ventilation adequate?	
<b>Section C: General Working Environment – Electrical</b>	
Is the fixed electrical system in good condition (e.g. no damaged sockets or wires)?	
Are there enough sockets for your work activities?	
Does all Trust-owned electrical equipment bear a portable appliance testing (PAT) sticker, and is it “in date”?	
Is existing portable electrical equipment free of faults/ obvious defects?	
<b>Section C: General Working Environment – Fire</b>	
Are flammable materials (e.g. paper) and ignition sources (e.g. cigarettes) kept to a minimum?	
Do you have an (informal) escape plan in case of fire?	
Is there a smoke detector or fire alarm that is regularly checked?	
<b>Section C: General Working Environment – Workspace and Storage</b>	
Is there enough space to work comfortably?	
Do you have enough privacy and freedom from disturbances to work?	
Do you have enough storage space for work equipment/ documents?	
Do you have adequate segregation from non-workers (e.g. children, pets)?	
<b>Section C: General Working Environment – Miscellaneous</b>	
If you have any concerns about managing working hours, workload, isolation or work-life balance, have you	Page 15 of 19

discussed these with your manager?	
Are you aware of arrangements for lone working, including communication with and reporting to the Trust base?	
Are you aware of how to access IT support*/ other equipment support if necessary?	
Are you able to avoid significant manual handling tasks? (If not, speak to your manager for advice on minimising risk.)	
If you have any security concerns, have you discussed them with your manager?	
If you have any other concerns, have you discussed them with your manager? (Please say what.)	
<b>Section C: General Working Environment – Workstation and Computer Use</b>	
Do you know how to set up the workstation and chair for safe use?*	
Is the screen clear, readable and flicker free?	
Do you know how to adjust the screen brightness/ colour (if required)?	
Are your eyes level with the top of the screen?	
Is the keyboard tiltable and is there space in front of it to rest your hands when not typing?	
Are the screen, computer and keyboard kept clean?	
Is the chair adjustable, and can you adjust it to suit your needs? (If your chair is fixed height, can you sit comfortably at your table/ desk?)	
Are your feet flat on the floor when the chair is set to the right height for typing, or when seated on a fixed-height chair? (If not, you may need a footrest.)	
Is there enough legroom for free movement?	

Are equipment and papers within easy reach?	
Is there enough space on the desk for work?	
Is the mouse/ trackball/ other input device suitable?	
If you need a document holder (e.g. when copy-typing, working between document and screen) do you have one?	
Are you able to spend 10 minutes in the hour doing something other than computer work?	
When using the computer are you free from aches, pains, tingling or pins and needles in the hands, arms, shoulders, neck or back? (NB: if you do experience these symptoms, tell your manager if these persist after you have stopped working on the computer.)	
Are you free from blurred/ poor vision, red/ sore/ dry eyes or headaches when using the computer? (If not, ensure you are taking enough breaks from the screen, and note that you may benefit from a sight test.)	
<b>Section C: General Working Environment – Laptops Only</b>	
Do you have a separate keyboard, mouse and laptop rest/ docking station? NB: these are required if using a laptop for long periods.)	
If you need a rucksack or trolley bag, do you have one? (Typically required if you are transporting your laptop between multiple work locations.)	
Can you avoid working on hand-held devices (e.g. smartphones, iPads) for long periods of time? (NB: if “no”, then a full-size laptop or desk PC is required.)	
Have you discussed any other concerns with your manager, and have these been addressed?	

**Manager Declaration**

I confirm that the above record of the homeworking plan is accurate. This information will be stored securely on the employees personnel file.

Manager

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Employee Declaration**

I declare that I understand the above job plan for homeworking and that this may be reviewed if outputs are not achieved.

Employee

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix 2

### Homeworking Team Agreement

<b>Department:</b>		<b>Manager:</b>	
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Please use this template to record details of any actions agreed to support the department in achieving satisfactory performance while homeworking is in place during the COVID Pandemic and to achieve social distancing.

Staff members subject to homeworking	Working Responsibilities / Areas of Focus	Objectives / deliverables	When will the action be completed?	Evidence of work provided	Follow Up meetings / Deadlines / Comments



**Manager Declaration**

I confirm that the above action plan will be monitored and managed with all staff during the period of team homeworking.

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Employee Declaration**

I confirm I will produce and achieve the objectives detailed during homeworking.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### Appendix 3

#### Flowchart for Determining Suitability for Homeworking

