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Remote Work Toolkit - COVID-19 Resource Packet

April 6, 2020

Health centers are serving on the frontline, providing critical health care services in communities dealing with the coronavirus and COVID-19. Some health centers are reducing exposure by sending non-clinical staff home to work. This packet contains procedures and tips to help health centers transition to a work from home environment and is informed by health centers who are currently implementing work from home techniques for non-clinical services and functions.

This packet could be used in conjunction with "***Reduced Workflows and Staffing Guidance for Non-Clinical Operations***" COVID-19 Resource Packet issued by NACHC on March 30, 2020. These materials are offered as general samples for health centers as they determine the most appropriate set up for staff working from home, appropriate management styles and communications for their organization.

Enclosed are:

1. Work from Home Readiness Assessment
2. Decision Support when Moving Staff to Remote Work
3. Steps to Moving Staff to Remote Work
4. Tips for Managing Staff Remotely
5. How to Establish Remote Communication
6. Samples: Work from Home Support Checklist; Daily Planning Guide; Tele-Work Procedure
7. Sample: Working and Managing Remotely (Training Slide Deck for Mid-Level Managers)

Additional information and resources can be found at:

- **Centers for Disease Control and Prevention (CDC) COVID-19** including strategies for **optimizing the supply of PPE** https://www.cdc.gov/coronavirus/2019-ncov/hcp/ppe-strategy/index.html
- **Health Resources and Services Administration (HRSA) Health Center Program COVID-19 Frequently Asked Questions (FAQ)** – includes **Federal Torts Claim Act** (FTCA) updates https://bphc.hrsa.gov/emergency-response/coronavirus-frequently-asked-questions.html

- **Centers for Medicare and Medicaid Services (CMS) COVID-19 FAQs** https://www.cms.gov/About-CMS/Agency-Information/Emergency/EPRO/Current-Emergencies/Current-Emergencies-page
- **NACHC's Coronavirus webpage** - http://www.nachc.org/coronavirus/
- **Health Center Resource Clearinghouse Priority Page COVID-19** –www.healthcenterinfo.org

Remote Work Toolkit

A Resource Packet for Staff & Managers

Table of Contents

Introduction

Health Center Organizations are working through some unprecedented times. With state-wide mandates to stay home, more and more organizations are looking to deploy teams of staff to work remotely in order to limit exposures to COVID-19 and to maintain flexibility for employees during school and daycare closures.

Many of these staff members have never worked from home before. And, many health center managers have never managed staff remotely. Coleman Associates spoke with numerous urban and rural FQHCs, medical practices and community clinics across the country who are all considering this new remote work strategy. This toolkit serves as a 'how-to' guide in order to support staff during the transition to remote work.

About this Toolkit

In this toolkit, we compiled some best practices regarding working remotely. At the request of the health center staff and managers, we focused mainly on developing easy-to-use tools. This way, organizations can make quick, proactive decisions to move staff to remote work while giving them the correct tools to set them up for success.

Setting Staff Up for Success: A Leadership Questionnaire & Checklist

Before you dive in, we suggest you perform a simple assessment to find out what technology capabilities staff currently have at home. (**See Part 1 of the Following Tool: Technology Capabilities at Home?**)

Then, we suggest you start by creating some simple tutorial videos and/or cheat sheets that include how to utilize VPN or Web Conferencing at home. (**See Part 2 of the Following Tool: Create Tutorials**).

Lastly, we suggest you make some important decisions regarding staff hours and communication expectations (**See Part 3: Staffing Considerations**).

After you fill out the following tool, you can proceed to train your managers and staff for remote work.
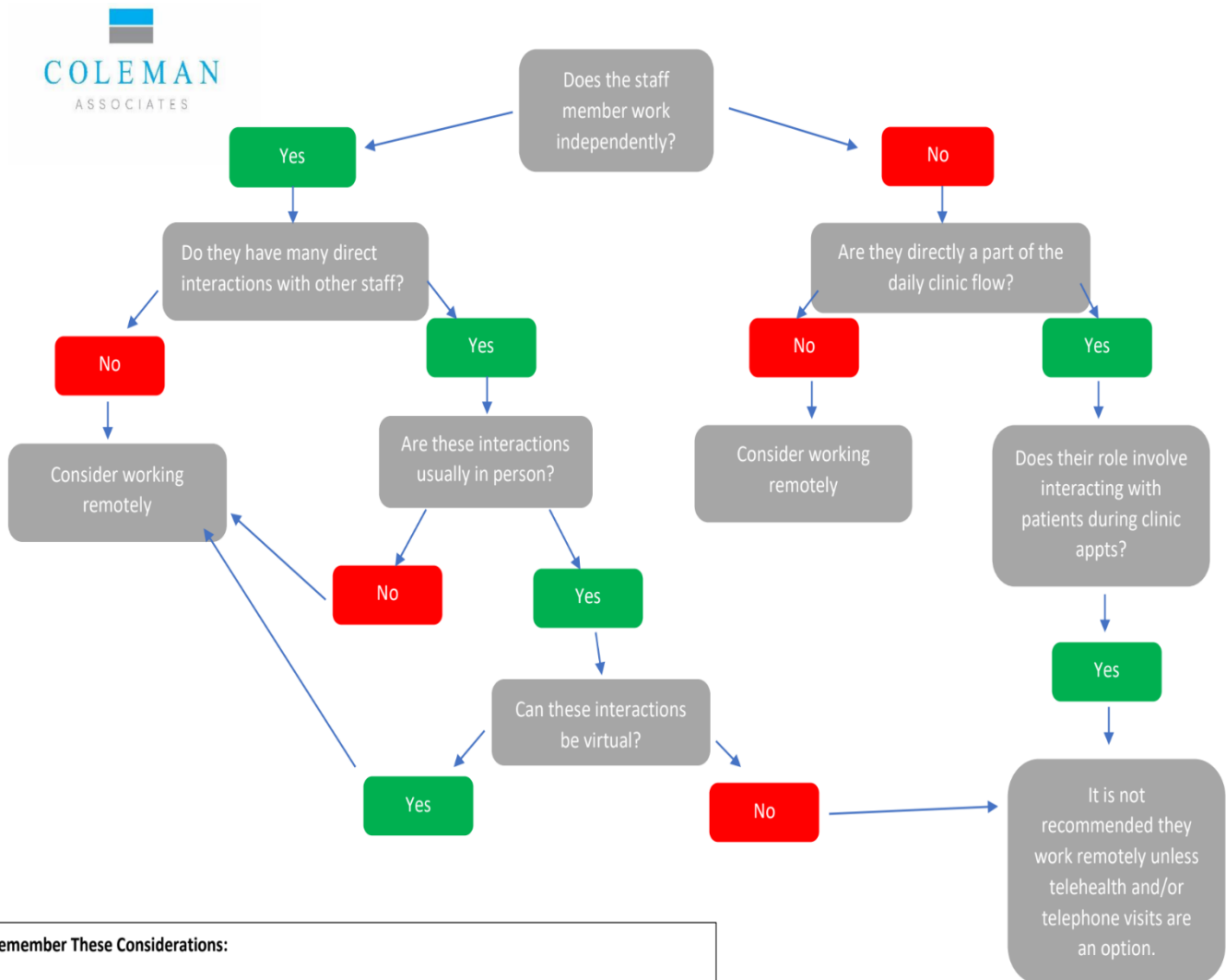
Setting Up Your Staff for Success

A Leadership Checklist & Questionnaire

❑ **Technology Requirements** *(to ask each staff member who may be deployed to work remotely)*
  - ✓ Laptop/Desktop?
    - ❑ _____
  - ✓ Webcam? (if not included with laptop/desktop)
    - ❑ _____
  - ✓ Reliable Telephone or Cell Phone Service? (if not using a company phone)
    - ❑ _____
  - ✓ Internet Access? Has your computer ever connected to a virtual conference platform before?
    - ❑ _____
  - ✓ Have you utilized VPN access & shared drive access from home before?
    - ❑ _____

❑ **Create Tutorials** *(A Checklist for Tutorials and Cheat Sheets Leadership/IT needs to Develop before Remote Deployment)*
  - ✓ What to include in a Demonstration Video for Web Conference Platform
    - ❑ Create an account & log in
    - ❑ Check audio & video
    - ❑ Dial in from phone for audio
    - ❑ Screenshare
    - ❑ How to utilize the chat box
    - ❑ How to mute/unmute
    - ❑ How to host
  - ✓ Put together a "how-to" for web conferencing cheat sheet for staff. *Include screenshot images!*
  - ✓ Create a troubleshooting quick reference guide for common technology challenges
  - ✓ Post all tutorials to the shared drive so all staff have access at any time

❑ **Staffing Considerations** *(A checklist for setting hours and staff schedules)*
  - ✓ Determine operational hours that absolutely need to be staffed
  - ✓ How will you stagger working hours for coverage during all operational hours?
    - ❑ How many different shifts do you need?
    - ❑ Are there peak hours that have to be covered?
  - ✓ HIPAA Compliant
    - ❑ Is the workspace in a private location in the house?
    - ❑ Can family members overhear any conversations?
    - ❑ Can family members see the computer/laptop screen?

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How to Deploy Staff

When deciding how and when to deploy staff to work remotely, we recommend following the Deploy Staff to Work Remotely Flowchart first. See below:

Does the staff member work independently?

Yes → Do they have many direct interactions with other staff?

No → Are they directly a part of the daily clinic flow?

Do they have many direct interactions with other staff?
- **No** → Consider working remotely
- **Yes** → Are these interactions usually in person?
  - **No** → Consider working remotely
  - **Yes** → Can these interactions be virtual?
    - **Yes** → Consider working remotely
    - **No** → It is not recommended they work remotely unless telehealth and/or telephone visits are an option.

Are they directly a part of the daily clinic flow?
- **No** → Consider working remotely
- **Yes** → Does their role involve interacting with patients during clinic appts?
  - **Yes** → It is not recommended they work remotely unless telehealth and/or telephone visits are an option.

Remember These Considerations:

- What type of technology does the individual have at home and what will they need provided to them?
- What types of distractions do they have at home?
- Can they carve out a home workspace?
- Can they work independently?

Moving Administrative Staff to Work Remotely

Once you have made decisions to deploy individual staff to work remotely, consider the following factors:

1. **What technology is needed?** First, evaluate what technology the staff member has at home. Things to consider are Wi-Fi (and speed), laptop/desktop with a webcam for video conferencing, phone, access to the EMR and any other software needed to complete their tasks, etc. What other equipment will they need from the organization?
   a. Here's a Simple Checklist:

➢ **Technology Checklist**
   ❑ Laptop/Desktop
   ❑ Web Conferencing & other software
   ❑ Webcam (if not included with laptop/desktop)
   ❑ Mouse (if applicable)
   ❑ Printer/copier (if applicable)
   ❑ Wi-Fi
   ❑ Telephone
   ❑ Headset/headphones
   ❑ Ergonomic workspace
   ❑ Office supplies (pens, paper, tape, stapler, etc.)

2. **Would remote work impact job performance?** When thinking about the involvement of the individual, consider if their work can be done remotely without a significant impact on the health center. For example, if a team member has daily meetings, don't rule them out from working remotely right away. Instead, evaluate what types of meetings are scheduled and if they can be done via video conferencing or can be consolidated. For staff such as Referral Coordinators, who spend the majority of their time on the phone with specialty offices or patients, this is an opportunity for them to work remotely with limited health center distractions.

3. **How will you contact & communicate with remote staff?** When moving staff to their home offices, be sure that their peers and others in the organization know how to reach them for questions by providing them with the contact information and vice versa. Typically, in a health center, a directory of phone extensions is given to all staff but in this case, someone who is working remotely will need a directory of phone numbers to reach others. *See attached sample tool.*

4. **How will you set clear expectations?** Set the stage of working independently by sharing clear expectations for working remotely and asking about their home life. Do they have young kids at home? Do they typically go to daycare or does someone watch them from home? Do they have space in their home to setup a home office? Can they dedicate an area away from the rest of the household to their workspace?

    a. **Pro-Tip:** When there are other adults in the household or older children, it's helpful to have a designated workspace so others know they are working.

5. **Would a trial basis help?** As long as the remote setup is not super involved or costly and the opportunity exists to return to work, why not consider testing remote work? Remember, there will be an adjustment period for the staff member and any family at home.

Contacting/Communicating with Leadership & Remote Staff

Sample Remote Leadership Contact Telephone Numbers

Name	Work Telephone #	Home/ Cell Telephone #	E-Mail Address
Chief Executive Officer			
Chief Operations Officer			
Chief Financial Officer			
Chief Medical Officer			
Human Resources Director			
Community Relations Director			
Assistant Medical Director			
Director of Behavioral Health			
Clinical Manager			
Director of IT or CIO			
IT Help Desk			

Provide this to all remote staff as well as a copy of the amended staffing directory with remote contact options.

5 Tips for Managing Remote Staff

1. First, acknowledge that everyone has a different work style. While you may have always known this was true at work, the same applies when working from home.
2. Secondly, different job roles require distinct management regarding work performance oversight. For example, managing referral output is different than managing a phone operator's schedule and work duties.
3. Always use data to oversee performance just as you would if you were in the same building. Don't get into the business of managing time or micro-managing people. Manage work.
4. During a check-in, ask the employee to let you know what it will take to get a job done. Advise them of when to sound an alert if they are running behind. Then, let them do the work, checking in on progress periodically.
5. If an employee struggles, offer to work through the struggle with them. Some questions to ask are:
   a. What kind of distractions do they have at home?
   b. What are the communication challenges?
   c. If they're feeling isolated, what interactions do they need with their peers or leadership? Remember, one person's work paradise is another person's work nightmare.

Managing Remotely Checklist

MANAGING REMOTELY

Checklist

Getting Started

❑ Share clear expectations.

  ✓ How often will you meet/check-in? Daily? Weekly?

  ✓ Will these meetings/check-ins be virtual or via telephone?

  ✓ What can they expect from you during these check-ins?

  ✓ What do you expect from them during these check-ins?

  ✓ What is the response time for returning a communication?

❑ Set Work Hours

  ✓ Similar to clinic hours?

  ✓ Are there mandatory hours they must be available by phone?

  ✓ Are there flexible hours in the day?

  ✓ Will they clock in & out?

  ✓ Do they need to communicate when they are taking a break and lunch?

Managing the Work

☐ Start each week with clear tasks & goals

☐ Establish clear deadlines

☐ Be clear that you are available anytime to help with progress

☐ Schedule progress check-ins

  ☐ What are the results so far?

  ☐ Are we still on target to meet the goal?

  ☐ What support is needed?

  ☐ Have you given praise and credit to the employee when due?

Working from Home Checklist Tool

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Identify a Workspace:

❏ Quiet and away from noise and distractions
❏ Private that allows for conversations related to direct patient care
❏ Clean background for video conference calls
❏ Acceptable desk or flat surface designed to accommodate equipment/technology
❏ Ergonomic desk chair
❏ Great lighting, natural if you can

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Limit Distractions:

❏ Set your agenda for the day to stay focused *(see the daily planning guide)*
❏ Place your phone on silent before a brainstorming session (let management know if you are doing this)
❏ Limit notifications from your personal social media platforms
❏ Find the right music to motivate you for the task, if helpful

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Set Ground Rules with Family:

❏ Plan for daycare, if needed
   ❏ Coordinate with other adults in the household if daycare is not an option
❏ Create a visual signal that alerts family you're working
   ❏ Closed-door
   ❏ Message Boards
   ❏ Closed sign and has the time you'll "return"
❏ Check-in with them during your breaks

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Setup Virtual Sessions:

❏ Use video conference calls, whenever possible
❏ Learn how to screen share, turn on/off your video and mute/unmute your computer
❏ Join video sessions 3-5 minutes early to test video & audio
❏ Limit virtual sessions to 2-3 hours
❏ Plan breaks for before or after long virtual sessions

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Communicating and Measuring Job Performance Remotely

Communication, Performance, Measures

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Communication	Performance	Measures
❏ Is communication clear? ❏ Are the goals clear? ❏ Do we need a new way to communicate? ❏ Are we communicating the right topics? Is it standard across the board?	❏ Did I praise the *Super Stars*? ❏ Did I provide feedback to the *Middle Stars*? ❏ Did I check-in with the *Falling Stars* and provide constructive criticism? ❏ Did you recognize the individual the way they want to be recognized?	❏ Are we meeting our goals? ❏ How can we invigorate the drive if we are not? ❏ Do we need a new plan to meet our goals? ❏ Who is outperforming the rest? How is this person doing it? Share best practices.

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A Guide for Daily Planning

My Goals for the week:

1. _____
2. _____
3. _____

Today's Focus w/deadlines:

1. _____
2. _____
3. _____

Speed Bumps (challenges):

1. _____
2. _____
3. _____

Drop the Mic (wins):

1. _____
2. _____
3. _____

Meetings/Check-ins scheduled for the day (time, topic/expectations, video conferencing number & attendees):

_____

_____

_____

_____

_____

_____

_____

In My Bubble:

This is a great place to capture any notes or thoughts from meetings as well as things/ideas that pop up when you're working throughout the day.

Telework Sample Procedure

<mark>Insert Organization Logo Here</mark>

_____ <mark>(Organization Name Here)</mark> allows telework for certain positions and job responsibilities. Additional considerations are made for the level of involvement in direct patient care. For employees who transition to telecommute, here are the General Guidelines that should be followed:

- The employer will assess the technology needs (*use the simple technology checklist*) and compare them with what the employee currently has at home.
- Home office/Workspace considerations, equipment needs and schedules should all be planned for in advance. <mark>What will the employer provide and what is expected of the employee?</mark>
  - List Items Here: _____
  - _____
  - _____
- The employer and employee will review the needs and work habits needed to be successful for telecommuting and create an action plan.
- The employer and employee will discuss the job roles and responsibilities to determine if telecommuting is appropriate (*see how to deploy staff flowchart*) and/or for how many days out of the week.
- Managers should <mark>know and share the number of hours an employee is expected to work every week.</mark> Part of this discussion should include mandatory hours the employee is expected to available by phone.
  - \# of Hours Expected Per Week #_____
  - Weekly Schedule Here: _____
  - _____
- <mark>Overtime expectations should be discussed and a clear policy should be written on when overtime is allowed, if at all (this applies to non-exempt employees).</mark>
  - <mark>Overtime _____ (*is* or *is not*) permitted.</mark>
  - <mark>Other: _____.</mark>

Setting Up a Trial Period:

Any telecommuting arrangement made may be decided to be on a trial basis for the first 30-60 days and can be discontinued by the employer and employee at any time within that time frame. If agreed upon by both parties, the Human Resources Department will draft a telecommuting agreement to be signed by all parties before beginning the trial period.

During the telecommuting trial period, the manager and employee will meet to discuss progress and any challenges. This schedule will be set by the manager and the employee can ask for additional meetings as needed for additional support. At the conclusion of the trial period, all parties will determine based on the progress and data if the telecommuting should continue.

Telecommuting Workspace:

Creating a telecommuting workspace requires planning to ensure the employee is set up for success. The employer and employee should review the "Working from Home Checklist Tool" and create a plan. In addition to the checklist, here are some other considerations:

- To be compliant with HIPAA guidelines, the manager may either visit the employee's home and or complete a virtual 360 review of the workspace to ensure no PHI is compromised. These can be done at any time and frequency as long as they are during working hours.
- Set work hours based on organization needs and operational hours. Determine what are mandatory hours to work and what times are flexible.

Budget:

The employee is responsible for the tax and other legal implications for the business use of the employee's home based on Internal Revenue Service (IRS) and state and local government restrictions.

_____ (*insert organization's name here*) will not be responsible for costs associated with the initial setup of the employee's telecommuting workspace such as furniture, lighting or any remolding/home modifications associated with the home office.

Equipment:

_____ (*insert organization's name here*) is not liable for the employee's own equipment breaking while performing work for _____ (*insert organization's name here*).
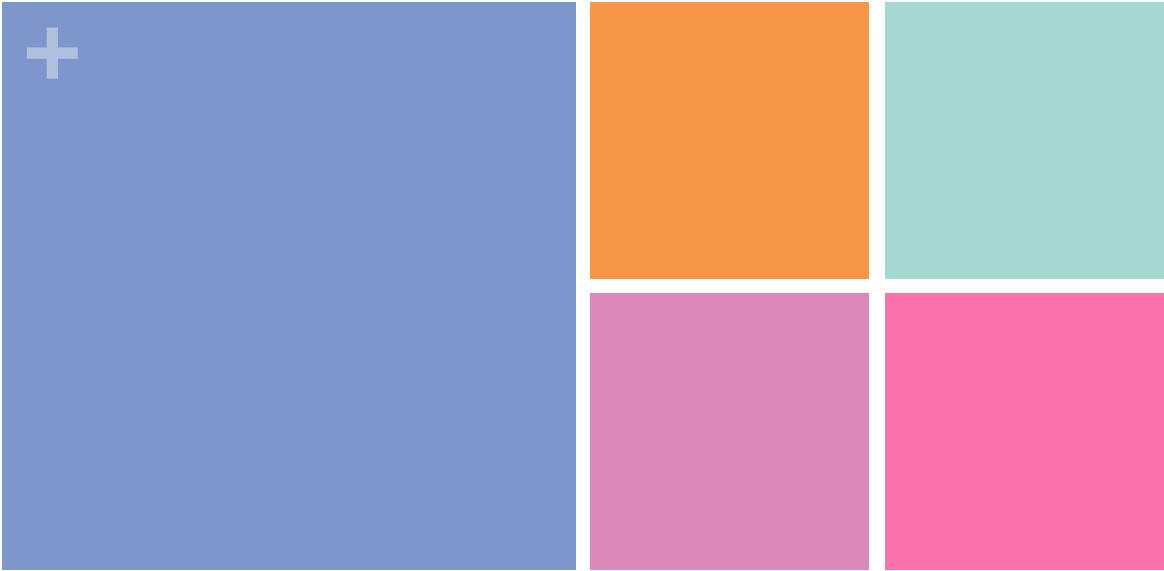
Equipment supplied by the organization is for business use only. The employer and employee should complete and sign an inventory list of all equipment supplied. Upon termination of employment, all company property will be returned to _____ (*insert organization's name here*).

Optional:

_____ (Employees Signature)

_____ (Employer's Signature)

Attachment: PowerPoint Slides for Staff Training

Working & Managing Remotely

A Crash Course

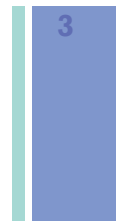**+**

Today We'll Cover: 5 Major Steps

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1. Setting up Technology for Success

2. Work from Home Set-up Tips

3. Communication When Working Remotely

4. How to Manage Well Remotely

5. Measuring and Communicating about Performance Remotely

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+ Before You Start

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- Start with a Working Remote Assessment:

- Questions to Ask Staff:
    1. Do you have Wi-Fi/Internet Access at home?
    2. Do you have a working computer or Laptop? What make/model?
    3. How would you rate your connectivity on a scale of 1-5?
    4. Have you ever used FaceTime, Zoom or other web conferencing on your Wi-Fi? Did it work?
    5. Do you have a working cell phone with reliable service?
    6. If not, do you have a land line?

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1. Set Up Technology

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Be super clear and provide instructions about what interface you are going to use when working remote. *For example:*

- Laptop/Desktop
- Webcam (if applicable for virtual meetings/check-ins)
- Telephone
- Web Conference Platform such as Zoom, GoToMeeting
- VPN Access or Shared Drive Access

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Technology Tips

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- If you're using Video Conferencing…
  - Organization should record a brief video to:
    - Demonstrate how to screenshare.
    - Demonstrate how to check audio and call-in for sound vs. using video for sound.
    - Demonstrate troubleshooting common challenges.
  - Post to YouTube or save on your shared drive that is VPN accessible.
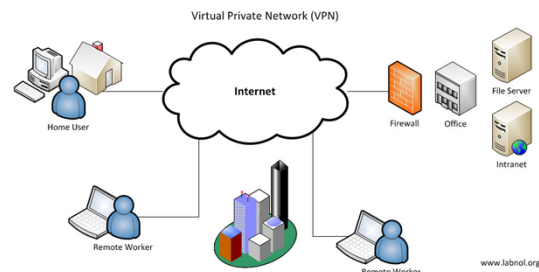   - Make SURE it is accessible to staff at all times, not just when they're starting to use this technology.

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Technology Tips

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- If you're using VPN (<u>v</u>irtual private <u>n</u>etwork) access, how are you going to test it works for everyone at home?

- Consider setting up 15-minute appointments between each staff member & IT.

- Provide cheat-sheet tips on where files are saved if staff is unfamiliar with the shared drive.

Virtual Private Network (VPN)

Internet

Home User

Firewall   Office

File Server

Intranet

Remote Worker

Remote Worker

www.labnol.org

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2. Working from Home Set-Up Tips

Use Video Conference Whenever Possible.

- It can be isolating to work from home.
- When you have daily check-ins or meetings, it's best to organize over video for higher levels of engagement versus telephone.
- This allows everyone to screenshare their work.
- Initially, join video meetings 3-5 minutes before the start time in case of technical issues. Once you are comfortable, you'll find you can join right on time.
- … Not to mention, it's more fun to be socially connected during this time.

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Working from Home Set-Up Tips

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Set-up a station in your home with a clean background that you won't mind if your team sees!

- You may have to think creatively about the position of your workspace to avoid having your back to common areas in your home where family members may pass through a virtual work session.

- Try to find space that has natural light, if you can. Think good energy and good flow.

- If possible, dedicate that space for work only. This provides a mental boundary between working and relaxing.

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Working from Home Set-Up Tips

Make sure your power cords, headphones, etc. are handy at your work station!

- It's a major bummer when you have to interrupt a group video session to run and charge!

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+ Working from Home Set-Up Tips

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Schedule virtual work sessions with some breaks in between.

- It can be disruptive if you need to get up to use the restroom in the middle of a virtual team work session!
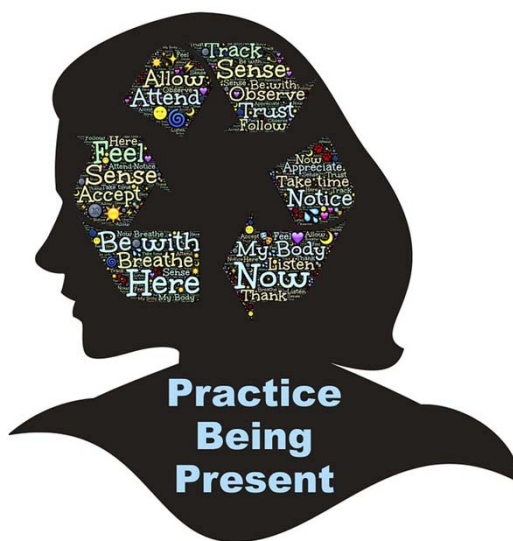
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Working from Home Set-Up Tips

Set Ground Rules with Your Family

- For the older kids and other adults in the house come up with a signal that let's them know you're working. Maybe a closed door, a sign that indicates "creativity in progress" or a huge closed sign that says "will return at 5pm" (or whatever time you're done).
  - Let them know when you'll check in with them during your breaks.
- Build in a walking schedule for you furry ones. This gives you a chance to stretch your legs and brainstorm on projects. Or call a colleague to check-in.

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Working from Home Set-Up Tips

- Limit distractions!
  - Logout of your social media accounts until your breaks.
  - Put your phone on silent if you're diving into a project (if your personal phone is the same as your work line) and let your team know the best way to get ahold of you.

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3. Communication When Working Remotely

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1. Schedule <u>daily</u> check-ins with your specific team! (video works best)
   - AM & *maybe PM too*

2. <u>What to Cover:</u>
   - What's the plan for today? Who is doing what?
   - What projects are we working on?
   - What are our overall goals?
   - Who needs help?
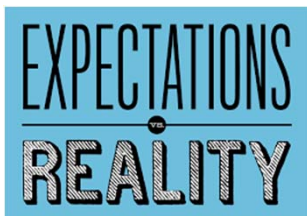   - Who has a win they want to share from today?

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+ Communication When Working Remotely

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3. Schedule <u>Weekly</u> Check-Ins
   - Share Company Messaging – preserve your culture
   - This is a great time to bring in a top leader to share personal thank yous, a rallying cry, or share wins

4. Decide on communication expectations between meetings
   - What time frame do emails need to be returned? What communication will be used for urgent needs? Email? Phone? Text? Instant Messaging? Make a plan and communicate it.
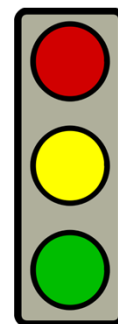
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4. How to Manage Well Remotely

- Setting Hours (It is recommended that departments set their own department hours unless top management disagrees. Make a decision on what hours need to be covered).
  - What schedule will you all agree to follow?
    - Mirror schedules are most often used by health center staff… clinic hours are 'mirrored' at home.
    - Clock in when you usually start. Clock out when you typically end.
    - Take your lunch and breaks.
    - One other option: "Red, Yellow, Green" hours as referenced by *The Adecco Group*. Red = no work. Yellow = flexible work. Green = agreed upon work hours in front of your computer.

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How to Manage Well Remotely

- Manage <u>Work</u> not People
  - Work is the only thing you can track while your team is remote
    - DON'T ask for extensive time tracking lists
    - DON'T call incessantly to check up on people
    - DON'T make work-tracking take more time than doing work
    - DON'T assign big projects without smaller check-in points along the way

DOs   DON'Ts

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How to Manage Well Remotely

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- **Manage Work not People**
  - **DO** check in on progress on an agreed upon schedule… checking in on a task/project list
  - **DO** ask to see results of the work periodically, even if it's not done
  - **DO** give credit, where credit is due. Deadlines met, innovations, taking on extra, etc.

DOs   DON'Ts

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5. Measuring and Communicating about Performance Remotely

- Think of creative ways to communicate performance wins

- Highlight and elevate *Superstars*

- Provide stellar feedback to your *Middle Stars*

- Check in a bit more frequently (but not incessantly) with your *Falling Stars*

- Can you make your Performance Dashboard virtual?

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+ Communication & Performance Tips

■ Remember *Monday Morning Leadership* by David Cottrell…

   ■ How will you continue to recognize your Superstars while they work remote?

   ■ Remember Carrots – think of ways to publicly recognize these staff members in daily check-ins, emails, weekly company messaging, etc.

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Communication & Performance Tips

- Preserving your culture while spreading out the workforce can be challenging
  - Use every opportunity to boost morale by communicating through multiple avenues:
    - Email
    - Recorded Telephone or Video Messages
    - One-on-one phone calls
    - Daily Check-ins with the Team
    - Weekly Company Communication

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