

Sample Work From Home Policy

- A. In response to a number of critical situations (i.e. worldwide pandemics, earthquakes, floods, wildfires, etc.), the Firm may not be able to safely operate within its physical office or may choose, for other reasons, to operate remotely. This policy has been designed to help guide the Firm in operating at fully capacity with team members in separate, remote locations.
- B. The decision to move from operating within the Firm’s physical office to remote workspaces will be made by the Managing Partner at any time and in accordance with federal, state & local authorities when applicable. The Managing Partner will either notify team members directly of said decision or delegate the Office Manager to do the same. Similarly, the decision to move operations back to the Firm’s physical office shall be made by the Managing Partner at any time and in accordance with federal, state & local authorities when applicable. The Managing Partner will either notify team members directly of said decision or delegate the Office Manager to do the same.
- C. **Workspaces:** The Firm highly recommends that team members working remotely designate a physical location, regardless of size, that offers an internet connection, privacy and remains consistent. Each team member is required to maintain an internet connection speed of 1.5 Mbps or more (up & down) at all times during the Firm’s Hours of Operation. If a team member is not able to meet this requirement, notice of the same must be delivered to the Managing Partner in writing, copying the Office Manager. Despite the location, the Firm and its team members remain obligated to keep client confidences from those people not employed by the Firm, including family members. As a result, team members will take actions to ensure that client info. (both in physical and digital format) is not accessible to others by use of password protections for digital info. or secure storage for physical info.
- D. **Hours of Operation:** All team members will be required to work the same hours remotely that they were working in the physical office prior to the remote transition. If, for any reason, a team member is not able to work the same hours, said team member will need to submit a request to work alternate hours to the Managing Partner, copying the Office Manager. Upon approval of the same in writing by the Managing Partner, the team member’s alternate hours may be adopted and published to the rest of the team to support communication and team collaboration.
- E. **Daily “Stand-Up” Meetings:** In a further effort to support communication, team collaboration and Firm culture, team members will participate daily in a “stand-up meeting” via video conference software. Team members will use this opportunity to share wins, make requests for collaboration on challenges and address any other

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operational issues. Please note that this meeting does not replace any other regularly scheduled Firm or team meetings, all of which will continue on their regular schedule and be attended as previously required by video conference software.

- F. **Internal Communication:** Team members are encouraged to communicate with each other frequently to promote communication, team collaboration and Firm culture. In so doing please limit the use of email for internal communication. Preferred methods of communication shall be scheduled or unscheduled phone calls or video conferencing, internal chat tools and/or task management within the Firm's practice management software.
- G. **External Communication:** Team members are encouraged to continue to communicate with clients, vendors, referral sources, etc. using the same methods as were used in the office with the exception of meetings that previously would have been scheduled in the office. In office meetings will be replaced by phone or video conference meetings as agreed upon by the attendees. Under no circumstances shall a team member meet with clients, vendors, referral sources or any other Firm contact (other than team members) at the team member's place of residence.
- H. **Phones:** The Firm's operations require the use of telephone communication with clients, vendors, referral sources, and other Firm contacts. As a result, all necessary steps will be taken to ensure that calls coming into the Firm's main line will be answered remotely as reliably as they were in the office. To that end the Receptionist shall use the current VOIP phone service to have calls coming in on the main line answered on a cell phone (or computer app) that will be monitored regularly by the Receptionist keeping the same Hours of Operation as were maintained in the physical office. Each team member will be responsible for providing the Managing Partner with a phone number where they can be reached while working remotely. Said number will be used to forward calls from the main line unless indicated otherwise in writing by the team member (i.e. calls will be taken over the VOIP app). Said number will also be published to all team members in an effort to support communication, team collaboration and Firm culture. All outgoing calls that constitute Firm business must be made through the use of the VOIP system through the applicable cell phone app or computer app. Additionally, said app shall be used by team members to place the phone line on a do not disturb outside of the Firm's Hours of Operation.
- I. **Mail:** The Firm's operations require the use of mail communication with clients, vendors, referral sources, and other Firm contacts via U.S.P.S., FedEx, UPS, and other courier or delivery services. As a result, the Managing Partner will determine the need for mail to be forwarded to a designated team member to be scanned and delivered electronically to the remaining team members. Alternatively, or in addition to, the Managing Partner

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may designate a team member to visit the office regularly to collect mail and other deliveries to scan and deliver them electronically to the remaining team members. Said frequency of such visits shall be determined by the Managing Partner.

- J. **Hardware:** The Firm's operations require the use of computers and other hardware. Upon making the decision to operate remotely, the Managing Partner, or the Office Manager at the Managing Partner's direction, will contact each team member and determine (1) what hardware is necessary to perform their job and (2) whether the team member's current office hardware will be sent to their remote workspace or a new piece of hardware will be purchased. The use of a team member's personal computer hardware is prohibited unless the Managing Partner approves the same in writing. The Office Manager shall keep a log of all hardware sent to a team member's remote workspace in an effort to maintain said hardware and track its return once operations return to the Firm's physical office.
- K. **Software:** The Office Manager will maintain a list of software that is being used on the Firm's hardware. This list will be updated regularly and referenced when new hardware is purchased or obtained. The Office Manager will also review the software lists upon the Firm's remote transition to determine if additional or alternate software is required to accommodate the Firm's remote operations.
- L. **Video Conferencing:** Video conferencing is a critical tool used to supplement or substitute for in person meetings. However, when using said tool to communicate externally, team members must maintain a professional appearance. As a result, team members participating in external video conferences (1) must be dressed and groomed as though meeting with the attendees in person and (2) must present a neutral video conference background devoid of any clutter, children, or other distractions. The use of a neutral digital background is allowed as long as it is applied appropriately and does not distract from the conversation.