Working From Home – Review Checklist

This checklist should be used to review Working From Home (WFH) arrangements and facilitate discussions between the staff member and supervisor:

- Prior to the expiry of a WFH Agreement (including trial arrangements) – the Checklist can be used to help to determine whether to continue/renew the arrangement.
- For general ‘monitoring’ discussions or in the event that the supervisor has concerns about the effectiveness of the WFH arrangement and the issue has not been rectified through ‘monitoring’ discussions – the Checklist can be used to help identify the areas that need to be improved.

This document should also be used to record the outcomes of the review.

Staff member’s name: ____________________________  Supervisor’s name: ____________________________

End date of current Agreement: __________________

Reason for review:  
☐ Trial arrangement is expiring  ☐ Agreement expiry is pending
☐ Concerns about effectiveness of arrangement  ☐ General monitoring of arrangement

Rating scale:  1 = Strongly disagree  2 = Disagree  3 = Agree  4 = Strongly agree

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>THE ROLE/WORK</td>
<td></td>
</tr>
<tr>
<td>Based on my observations and discussions relating to this WFH arrangement, I now consider:</td>
<td></td>
</tr>
<tr>
<td>The duties of the role are suited to WFH</td>
<td>1 2 3 4</td>
</tr>
<tr>
<td>The level of supervision required to perform this role is suited to WFH</td>
<td>1 2 3 4</td>
</tr>
<tr>
<td>This WFH arrangement has not impacted on service delivery</td>
<td>1 2 3 4</td>
</tr>
<tr>
<td>This WFH arrangement has not impacted on the rest of the team’s work load</td>
<td>1 2 3 4</td>
</tr>
<tr>
<td>Comments:</td>
<td></td>
</tr>
</tbody>
</table>

<p>| STAFF MEMBER’S WORKING STYLE &amp; PERFORMANCE                                |
| Based on my observations and discussions relating to this WFH arrangement, I consider: |
| The employee’s working style is suited to WFH                             | 1 2 3 4 |
| The employee has the organisational knowledge and technical skill to be able to effectively work from home | 1 2 3 4 |
| The employee consistently meets deadlines and produces a level of output consistent with what is expected &amp; agreed whilst working from home | 1 2 3 4 |
| The work produced from home is of the quality expected of the employee     | 1 2 3 4 |
| The employee has maintained effective channels of communication with their supervisor, colleagues &amp;/or clients whilst | 1 2 3 4 |</p>
<table>
<thead>
<tr>
<th>Consideration</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>The employee’s performance whilst working at home is ‘satisfactory’ (as defined in the Performance Development Process for Professional Staff)</td>
<td>□ 1 □ 2 □ 3 □ 4</td>
</tr>
<tr>
<td>The employee appears to have created a home-based work environment that is free from distractions and conducive to productivity</td>
<td>□ 1 □ 2 □ 3 □ 4</td>
</tr>
<tr>
<td>The employee appears satisfied with the WFH arrangement</td>
<td>□ 1 □ 2 □ 3 □ 4</td>
</tr>
<tr>
<td>The employee has complied with all the terms and conditions of their WFH Agreement</td>
<td>□ 1 □ 2 □ 3 □ 4</td>
</tr>
<tr>
<td><strong>Comments:</strong></td>
<td></td>
</tr>
</tbody>
</table>

**IMPACT OF WFH ARRANGEMENT**
Based on my observations and discussions relating to this WFH arrangement, I consider that the time spent working from home:

| Has not impacted on the employee’s level of job or organisational knowledge | □ 1 □ 2 □ 3 □ 4     |
| Has not impacted on the employee’s connection to the team and/or work relationships with other team members | □ 1 □ 2 □ 3 □ 4     |
| Has not impacted on the employee’s opportunities for learning & development | □ 1 □ 2 □ 3 □ 4     |

**Comments:**

**OTHER DETAILS**
Based on my observations and discussions:

| The arrangements in place for the provision/covering of IT and other equipment/expenses are working well | □ 1 □ 2 □ 3 □ 4     |
| The arrangements in place for monitoring the effectiveness of the arrangement are working well | □ 1 □ 2 □ 3 □ 4     |

**Comments:**
### Outcome of Review

On the basis of my assessment of the WFH arrangement and my discussions with the staff member, the following outcome has been determined:

<table>
<thead>
<tr>
<th>Please tick</th>
<th>Outcome of Review</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option 1</strong></td>
<td>The <strong>trial</strong> arrangement was successful and therefore the arrangement will continue for the remainder of the term specified in the WFH Agreement.</td>
</tr>
<tr>
<td>□</td>
<td><strong>Next steps:</strong></td>
</tr>
<tr>
<td></td>
<td>- If there are no changes to the arrangements as detailed in the WFH Agreement, the staff member and supervisor should sign below to indicate their acceptance of the review outcome and send a copy of this document to your HR Business Partner.</td>
</tr>
<tr>
<td></td>
<td>- If there are changes to the arrangements, please complete a revised <a href="#">WFH Agreement</a>.</td>
</tr>
<tr>
<td><strong>Option 2</strong></td>
<td>The arrangement will be <strong>renewed on exactly the same terms and conditions</strong> as detailed in the existing WFH Agreement (subject to an OHS assessment of the home-based work site).</td>
</tr>
<tr>
<td>□</td>
<td><strong>Next steps:</strong></td>
</tr>
<tr>
<td></td>
<td>- Please specify the end date of the renewed term (maximum of 12 months):</td>
</tr>
<tr>
<td></td>
<td>- The staff member and supervisor should both sign below to indicate their agreement with the review outcome and their continuing acceptance of the terms and conditions of the WFH Agreement.</td>
</tr>
<tr>
<td></td>
<td>- Please contact your HR Business Partner to arrange an OHS assessment of the home-based work site.</td>
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<tr>
<td></td>
<td>- Please send a copy of this document and the OHS assessment report to your HR Business Partner for forwarding to HR Operations (for recording in SAP and filing on personnel file).</td>
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<tr>
<td><strong>Option 3</strong></td>
<td>The arrangement will be <strong>renewed on different terms and conditions</strong> from those in the existing WFH Agreement</td>
</tr>
<tr>
<td>□</td>
<td><strong>Next steps:</strong></td>
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<tr>
<td></td>
<td>- Please complete a new <a href="#">WFH Agreement</a>.</td>
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<tr>
<td></td>
<td>- Please contact your HR Business Partner to arrange an OHS assessment of the home-based work site.</td>
</tr>
<tr>
<td><strong>Option 4</strong></td>
<td>The <strong>arrangement will continue</strong> for the remainder of its current term, however we have agreed to the following <strong>modifications:</strong></td>
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<tr>
<td>□</td>
<td><strong>Next steps:</strong></td>
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<td></td>
<td>- The staff member and supervisor should both sign below to indicate their acknowledgment of the review outcome.</td>
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<tr>
<td></td>
<td>- Please advise your HR Business Partner of the changes so they can help you determine if any follow up action is required (e.g. a new OHS assessment).</td>
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<td></td>
<td>- Please send a copy of this document to your HR Business Partner for forwarding to HR Operations (for recording in SAP and filing on personnel file).</td>
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### Outcome of Review

**Option 5**

- **The arrangement will be discontinuing** – before communicating this to the staff member, please see the [Working from Home Procedure](#) and the [Workforce Management Procedure – Flexible Working Arrangements for Parents and Carers](#) (where applicable).

**Next steps:**
- Please specify the end date of the arrangement (please note at least four weeks notice to the staff member is required):
- The staff member and supervisor should both sign below to indicate their acknowledgment of the review outcome.
- Your HR Business Partner (in conjunction with Workplace Relations) should be consulted to determine the most appropriate way of communicating this outcome to the staff member.

### Signatures

I acknowledge the outcome of this review, as detailed above.

<table>
<thead>
<tr>
<th>STAFF MEMBER</th>
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<tbody>
<tr>
<td>Staff member’s name:</td>
<td>Staff member’s signature:</td>
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<td>Date:</td>
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<tr>
<th>SUPERVISOR</th>
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<tr>
<td>Supervisor’s name:</td>
<td>Supervisor’s signature:</td>
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<td>Date:</td>
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<th>HEAD OF UNIT</th>
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<td>Head of Unit’s name:</td>
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<td>Date:</td>
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