

Establishing and Managing Remote Tasks:

A Quick Start Guide for Managers

Overview

When first implementing flex arrangements, moving entire teams to remote operations, or adjusting standard operations during unique circumstances, it is essential that managers are prepared to establish goals, priorities, and protocols with employees quickly and clearly. This quick start guide provides helpful information to help supervisors establish and manage remote work engagements.

Establishing Priorities and Goals

When moving employees to remote or other flex arrangements, it is important that managers work with each individual employee to establish expectations, goals, priorities, and protocols. In some situations, such as those where entire teams are temporarily moving to remote work to accommodate unique circumstances facing the University, departmental or unit leadership may adjust general operations and unit-wide protocols, but managers are still responsible for addressing employee expectations on a case-by-case basis.

Here are some helpful tips for managers to keep in mind when establishing remote arrangements:

- **Share Priorities:** Share any information from senior or unit-leadership that addresses changes to general operational priorities.
- **Address Ability:** Review each employee's general position with them to ensure you are on the same page about which projects/work is able to be prioritized and completed remotely, which duties cannot be completed remotely (and therefore may need to be reassigned), and any new duties that are being introduced as a result of the given circumstances.
- **Establish Goals and Timelines:** As is done with standard performance management, work with the employee to establish key information such as goals, expected timelines or milestones, and reporting methods.
- **Establish Team Norms:** If moving multiple employees to remote or other flex arrangements, managers should establish and share any changes to team norms such as hosting departmental meetings via Microsoft Teams, moving one-on-one meetings to phone/email co, or using OneDrive to collaborate on and share files.

Managing Throughout the Arrangement

After the arrangement(s) have been established, it is important for supervisors to continue standard performance management. That said, communication may need to change in terms of frequency or channel depending on the situation. To help maintain continuity in communication and management, here are some helpful tips:

- **Establish Set Meetings:** Establish a meeting schedule for both individual employees and larger teams that can be completed through remote connection such as conference calls or Microsoft Teams. Ensure that these meetings are marked on all parties' calendars. Sharing key information (e.g. emailing agendas the day before) can help enhance the efficiency of meetings.

- **Continue Performance Management:** Maintain the University performance management model by continuing to use informal check-ins to gather necessary updates on assignments and provide feedback on performance. For hourly staff, this may be an easy way to have consistent collection of work from home logs for necessary hours tracking.

Additional Considerations

- **Data Security:** When working remote, it is still critical to ensure compliance with OIT policy and guidelines regarding data security and appropriate network use. For more information, refer to [Policy 91.003: Computer and Network Acceptable Usage](#) and the [OIT Guidelines for Securing Remote Work](#).
- **Maintaining Compliance:** Compliance with all state and federal regulations such as [HIPAA](#) and [FLSA Time Reporting](#) is still essential for all University operations, even in remote work situations. Managers can help ensure compliance by reminding employees who are moving to flex arrangements of necessary policies and available training information.
 - **Time-tracking:** For state and federal compliance, non-exempt hourly employees shall maintain a work from home log that is submitted to the supervisor. For more information, see the [sample work from home](#) log and [guidelines for flex arrangements](#) on the [Managing Flex website](#).

Additional Information

In addition to the information shared in this Quick Start guide, supervisors and employees alike are encouraged to review the [Managing Flex Arrangements website](#) hosted by UHR which includes links to relevant policies, guidelines, tools, and additional tips for success.