

Hybrid Working

Scheme – Guidance for Managers & Staff

February 2025



Guidance Overview

Title:	Hybrid Working Scheme – Guidance of Managers & Staff		
Ownership:	Director of People & Place		
Equality Screened:	YES	Trade Unions Consulted:	Yes
Approved by:	AMT	Date Approved:	18 th February 2025
Date Implemented:	19 th February 2025	Date for Review:	February 2027
Version No.	1.0	Supersedes:	Hybrid Working Scheme – Guidance for Managers & Staff
Director Responsible:	BSO Director of Human Resources and Corporate Services		
Lead Author¹:	Peter Lavery /Robin Arbuthnot	Lead Author Position:	Assistant Director (s) of HR
Department:	Human Resources	Contact Details:	BSO.ERandAbsence@hscni.net
Key Words:	Hybrid Working, Homeworking, Flexible Working, Business Continuity		
Links to other Policies, Procedures & Guidance	PHA Working Effectively Resource Pack Leave Pack (Including Flexible Working Options) - PHA.pdf		

¹ Minor amendments to move from Pilot to Regular scheme have been made by Karyn Patterson, Senior HR Business Partner to PHA.

Contents

1.0 Introduction.....	4
2.0 Scope	4
3.0 Definitions.....	5
3.2 <i>Hybrid Working</i>	5
3.3 <i>Flexible Working</i>	5
3.4 <i>Remote Working</i>	5
3.5 <i>Agile Working</i>	5
4.0 Hybrid Working Principles	5
4.1.1 <i>Visibility</i>	5
4.1.2 <i>Balance</i>	6
4.1.3 <i>Equity</i>	6
4.1.4 <i>Delivery</i>	6
5.0 Responsibilities.....	6
5.1 <i>PHA Agency Management Team</i>	6
5.2 <i>Staff Responsibilities</i>	6
5.3 <i>Line Manager Responsibilities</i>	8
5.4 <i>Human Resources & Corporate Services</i>	9
5.5 <i>Trade Unions</i>	9
6.0 The Process - Requesting Hybrid Working	9
<i>Step 1: Submit a Request -</i>	10
<i>Step 2: Risk Assessment</i>	10
<i>Step 3: Consideration of Request</i>	10
<i>Step 4: Outcome</i>	11
7.0 Terms & Conditions – Base and Business Mileage	13
8.0 Security & Confidentiality	14
9.0 PHA Equipment and ITS Support	14
10.0 Insurance	15
11.0 Recovery of PHA Property	16
12.0 Monitoring and Review	16
13.0 Scheme Review	16

1.0 Introduction

- 1.1 In response to the pandemic, the Public Health Agency (PHA) acted quickly to protect the health and safety of staff by implementing government advice in March 2020 to allow staff to work from home. A large proportion of the workforce availed of this. An Interim Working from Home Policy was put in place to facilitate this.
- 1.2 A Pilot Hybrid Working Scheme replaced the Interim Working from Home Policy in August 2022 and was implemented on a phased basis.
- 1.3 Following an evaluation of the pilot scheme which seen considerable staff input, the Agency Management Team concluded that the pilot scheme was successful in so much as the flexibility afforded to staff was welcome and business needs continued to be met. On this basis AMT agreed to regularise the scheme on the same basis with staff being able to choose to work up to 40% of their working hours remotely.
- 1.4 The purpose of this regularised scheme is to set out the criteria and arrangements for how employees can apply for hybrid working. The scheme shall ensure a consistent approach which meets the needs of our business. It will be reviewed periodically to ensure it remains effective and service delivery is not negatively impacted.
- 1.5 To work effectively, any hybrid working arrangement must primarily meet the business needs of the PHA, followed by the individual needs of staff, to ultimately ensure the continued delivery of safe and high-quality services.
- 1.6 The PHA have developed a number of Health & Well Being & Mental Health Resources in conjunction with regional HSC colleagues. As an employer PHA are committed to protecting the health and wellbeing of our staff and have further identified locally based Health & Wellbeing Champions who will work with staff locally to encourage good habits which support Health & Wellbeing. All staff and managers are encouraged to avail of the resources available and accessible on our People Portal.

2.0 Scope

- 2.1 It is accepted that this scheme may not be applicable to all roles within the PHA. Where service needs can accommodate, this scheme is applicable to permanent, temporary, full time and part time staff and may on some occasions be extended to Agency Workers. The relevant Senior Manager will determine whether hybrid working arrangements will be viable.

3.0 Definitions

- 3.1 At the outset of the guidance it is important to be clear exactly what is meant by different terms which are commonly used when talking about hybrid working.

The key terms are:

3.2 *Hybrid Working*

This is the term used to describe how a member of staff balances their working week between working at home and working at their contracted place of work.

3.3 *Flexible Working*

This is the term used to describe when a member of staff applies to make a contractual change to their contracted hours or working pattern. Staff who for whatever reason need to change their contracted hours or working pattern to facilitate personal arrangements should do so by applying for Flexible Working through PHA's suite of flexible working arrangements.

3.4 *Remote Working*

This term refers to staff who may be required to work from different PHA work locations during the course of their working week. This may mean working from another PHA office which is not their stated contracted base.

3.5 *Agile Working*

This describes a form of working which takes account of work processes, accommodation, collaborative working and technology and uses it in a way that allows work to be done from any location at different times.

4.0 Hybrid Working Principles

- 4.1 The PHA's strategic approach to Hybrid Working will be based on the following key principles:

4.1.1 *Visibility*

Senior Leaders will be visible within the workplace to provide leadership to the organisation. For those managers who have responsibility for multiple sites, this includes having a presence on each of these sites. Line Managers should take responsibility for their respective teams to ensure clarity as to where staff are working each day.

4.1.2 Balance

Staff will be able to voluntarily request a maximum of 2 days per week working from home. Days at home may not be fixed and may vary from week to week depending on business needs.

Part time staff will be able to request hybrid working on a pro-rata basis which equates to a maximum of 40% of their total contracted working hours.

4.1.3 Equity

The PHA will act consistently across all its service areas with transparent decision making.

4.1.4 Delivery

The PHA must ensure it delivers the highest quality service to service providers, partners and service users; decisions regarding hybrid working must not negatively impact this.

5.0 Responsibilities

5.1 PHA Agency Management Team

- 5.1.1 The PHA Agency Management Team have overall responsibility and oversight for the effective operation of this scheme.
- 5.1.2 Delegated responsibility for overseeing its implementation has been given to the appropriate Assistant Directors / Heads of Service within each Directorate.

5.2 Staff Responsibilities

- 5.2.1 Comply with all PHA policies and procedures whilst working whether this in their home or in PHA offices;
- 5.2.2 While availing of hybrid working, maintain the professional manner that would be expected in the workplace at all times. This includes ensuring their camera is turned on for virtual meetings.
- 5.2.3 Ensure that you are fully contactable during working hours through the PHA IT and telephony systems provided;
- 5.2.4 Understand that there is no right to avail of hybrid working, it is a management decision based on the needs of the business and can be withdrawn at any time with immediate effect, however in most circumstances staff will be provided with 4 weeks' notice.

- 5.2.5 As part of the hybrid working arrangement, the days spent at home may vary depending on the needs of the service. Staff will be required to attend the office in line with service needs and manager approval.
- 5.2.6 Be aware that where there is attendance, disciplinary or performance issues line managers reserve the right to withdraw hybrid working arrangements and request staff attend the workplace.
- 5.2.7 Deliver the agreed work objectives set out by the line manager on a timely basis;
- 5.2.8 Inform your line manager as soon as possible in the event of an accident or incident occurring whilst working at home. This includes reporting any damaged, lost or stolen equipment, breaches of confidentiality or loss of data;
- 5.2.9 Complete a risk assessment before commencing a hybrid working arrangement which is contained within the [Hybrid Working Request Form](#) Staff will work safely and comply with any control measures identified in the risk assessment. Where any new risks become evident, you must notify your line manager immediately and review the risk assessment to reduce risk.
- 5.2.10 Report any sickness in line with the PHA's Attendance at Work Policy and Procedures.
- 5.2.11 Flexi-leave, appointments or work outside of normal business hours must be approved as normal by line management in accordance with normal policy arrangements. Managers are however encouraged to promote flexible working where possible.
- 5.2.12 Be familiar with any personal tax and insurance issues relating to working from home and to alert the HMRC and insurance provider if required to do so.
- 5.2.13 Report any damage or significant "wear and tear" to equipment provided by the PHA to your line manager and appropriate department e.g. ITS at the earliest opportunity.
- 5.2.14 Be available to attend workplace meetings/ training etc when required or requested to do so.
- 5.2.15 Ensure the safe storage of PHA equipment and confidential information in line with Information Governance procedures. It is anticipated that staff working

from home should be working from electronic files and it will only be in exceptional circumstances that paper files should be taken home. Where paperwork containing personal information is to be taken home, it must have prior written authorisation and must be stored in line with PHA information governance procedures.

5.3 *Line Manager Responsibilities*

- 5.3.1 Consider hybrid working as a key enabler to more flexible, responsive working patterns and to facilitate better use of the PHA estate.
- 5.3.2 Treat each request for hybrid working on its own merits and give it reasonable consideration;
- 5.3.3 Consider the needs of the individual requesting hybrid working. Requests from people with disabilities for more than the maximum of two days, may be considered as being a 'reasonable adjustment' request under the Disability Discrimination Act as a recommendation from Occupational Health.
- 5.3.4 Where a part time member of staff requests hybrid working, discuss with them what is the most efficient way of enabling them to do so without causing undue burden to the employee for example you may need to agree a pattern over a 2 week period to maximise efficiency and productivity.
- 5.3.5 Ensure that regular contact is maintained with all staff availing of hybrid working through the use of technology, via MS Teams, telephone, face to face meetings and any other method of communication available. Managers must ensure that regular supervision and team meetings are arranged in the normal manner.
- 5.3.6 Assess the sensitivity and confidentiality of the work to be undertaken from home and ensure that the member of staff has completed their mandatory Information & Governance training; which can be accessed via [Learn HSC](#).
- 5.3.7 Ensure that the staff member's [Hybrid Working Request form](#) including their risk assessment has been completed prior to agreement of a hybrid working arrangement and discuss any potential risks with the member of staff. Where appropriate seek advice from the PHA Health and Safety Adviser.
- 5.3.8 Ensure that incidents or accidents are logged appropriately and at the earliest opportunity via the Intranet reporting system.

- 5.3.9 Liaise with the ITS Department before agreeing any hybrid working arrangements to discuss/agree potential IT equipment/access arrangements, where necessary (See section 7 ICT Requirements).
- 5.3.10 Liaise with the Human Resources Department (Attendance / Health & Wellbeing team) where advice or guidance is required;
- 5.3.11 Ensure staff are aware of expectations and the required standard of work: In some instances, it may not be appropriate for staff to avail of hybrid working where there are issues regarding conduct, attendance, disciplinary or performance. In these instances, managers should seek advice from Human Resources
- 5.3.12 Ensure staff adhere to their responsibilities regarding health and safety, information governance and confidentiality;
- 5.3.13 Ensure that the scheme is not used to replace carer's leave or sickness absence in cases where a member of staff is unfit for work.
- 5.3.14 Managers will be required to monitor of the application of the Hybrid Working scheme and ensure staff are complying with the provisions therein.

5.4 *Human Resources & Corporate Services*

- 5.4.1 Ensure this scheme is applied in a fair manner through advice on its application;
- 5.4.2 Where appropriate seek advice from the PHA Health & Safety Advisor regarding Hybrid Working Health & Safety Provisions / Risk Assessments

5.5 *Trade Unions*

- 5.5.1 Trade Union representatives have an important role to play generally providing advice, support and working in partnership with managers and the Human Resources team in looking to ensure that the Hybrid Working Scheme is implemented to deliver benefits to the PHA, its staff and PHA partners, service providers and service users.

6.0 The Process - Requesting Hybrid Working

- 6.1 This process outlines the steps that should be taken by both staff and managers in consideration of hybrid working arrangements.

Step 1: Submit a Request -

- 6.2 Staff who wish to be considered for hybrid working should complete the [Hybrid Working Request eForm](#). On completion of this eform your line manager will receive an automated email detailing your request for consideration to assess suitability of your role for Hybrid Working who will then meet with you to discuss.

Step 2: Risk Assessment

- 6.3 When making your application you will be asked to **complete** a risk assessment. This risk assessment will be considered by the line manager as part of the meeting to discuss suitability for hybrid working arrangements.
- 6.4 The Health and Safety at Work (NI) Order 1978 requires all employers to ensure as far as is reasonably practicable, the health, safety and welfare of staff whilst at work. This duty also applies to staff working from home as part of a hybrid arrangement. This also places an obligation on staff to ensure they take reasonable care not to put themselves or others at risk whether at their contracted place of work or at home.

Step 3: Consideration of Request

- 6.5 On receipt of a Hybrid Working Request a meeting should be held as soon as practicable between the staff member and the manager to discuss the suitability of the hybrid working arrangements. This meeting should happen within 10 working/14 calendar days of the request being made. It is expected that managers will review the arrangements periodically with staff at monthly 1-1 meetings and where appropriate meet with individuals to discuss any concerns.
- 6.6 The line manager should consider the following factors when discussing and considering a hybrid working request;

The business needs

The service being delivered will not be a detriment due to hybrid working

The impact on team workload	The absence of the individual from the workplace will not create additional workload for other staff or affect operational effectiveness.
The suitability of the job/work task	Hybrid working will only be possible where the nature of the role allows it.
The suitability of the home work area	The member of staff's home, when this is being used as a work base, should be a safe and secure working environment. It is the responsibility of the member of staff to provide assurance of this through their completion of the H&S risk assessment.
The capability of the member of staff	The ability to deliver work effectively without supervision. Staff who are subject to either informal or formal conduct, attendance or capability proceedings will not normally be eligible for working from home arrangements, particularly if they require close supervision and coaching by their manager to make the necessary improvements.
ICT requirements	Due consideration to ICT requirements should be given prior to agreement to working from in a hybrid approach. ICT equipment are subject to a costed business case by the line manager, with advice from the Information Technology Services (ITS). It should be noted that all costs to be incurred will require approval from the budget holder responsible for the member of staff's cost centre.

Step 4: Outcome

6.7 Following the meeting between the staff member and line manager, the line manager should complete the [PHA Hybrid Working Approval Form](#) within 10 working/14 calendar days of the date of the meeting to inform the staff member of their decision. Once the Hybrid Working Approval eform is completed, an

automated email will be issued to the employee to confirm in writing if their request has been approved, and if so how many days has been approved, or if the manager is unable to facilitate the request for hybrid working.

Request Approved

6.8 If the request is approved, the manager will agree the following:

- 6.8.1 Clear work objectives and arrangements with the member of staff;
- 6.8.2 If required, discuss any potential issues arising from hybrid working (e.g. caring responsibilities. Health and safety etc.).
- 6.8.3 Managers should ensure staff undertake, where applicable, an up to date Display Screen Self- Assessment. This is a requirement of the Health and Safety (Display Screen Equipment (DSE) regulation 1992 relating to regular users. This assessment can be accessed here: [‘Display Screen Self-Assessment’](#). Staff are also required to undertake the eLearning module as part of their mandatory training and prior to completion of self-assessment. Once completed, assessment from the e-learning module should be provided to your line manager to address any issues of concern.
- 6.8.4 Should any queries arise, further advice may be sought from the PHA’s Health and Safety Advisor. The new hybrid working arrangement cannot commence prior to these risk assessments being carried out and any necessary control measures having been implemented.

Request Declined

- 6.9 If a line manager declines a request for hybrid working they should provide the reasons to the member of staff in the Rationale Section of the Hybrid Working Approval e-Form. Please note, that the information the manager contains in the Rationale section will be automatically shared with their staff member, and will be regarded as the outcome in writing. A copy of the outcome will also be forwarded to the manager’s email address upon completion for their own records.
- 6.10 Staff members have a right of review to the decision not to grant hybrid working in line with this Scheme. If a staff member wishes for this decision to be reviewed they should contact their Line Manager within 10 working days/14 calendar days of the decision being communicated in writing. The Line Manager should then arrange for the requested review to be conducted

by the Senior Manager / Head of Department. Following this, the final decision will be conveyed in writing to the member of staff by the Senior Manager/Head of Department.

- 6.11 All documentation relating to an application for hybrid Working, must be retained by the manager.

Step 5: Withdrawal or Suspension of Hybrid working arrangement

- 6.12 Agreed hybrid arrangements can be withdrawn or temporarily suspended if it is demonstrated that:

- The business needs are not being met
- The performance of the member of staff suffers as a result of hybrid working;
- The effectiveness of the team in which the member of staff work is compromised.
- Change in Business Needs

- 6.13 In most circumstances, if regular hybrid working arrangements are to be withdrawn, the member of staff will be given in writing, a minimum of 4 weeks' notice of this change. However, if hybrid working arrangements are reviewed due to the staff members performance, attendance or conduct, the manager reserves the right to immediately withdraw the hybrid working arrangement and these may be dealt with under the appropriate PHA Policy should this be necessary.

Changing Roles

- 6.14 It is noted that staff who commence a new role in another service area of PHA, they will be required to reapply for hybrid working if they wish to avail of it in their new post. Staff in these cases may be required to attend the workplace more regularly during their probationary period for training and support purposes.

7.0 Terms & Conditions – Base and Business Mileage

- 7.1 Whilst working from home, a member of staff's base remains as defined in their contract of employment. Staff are only permitted to work from their own homes. This does not impact staff who are required to visit or work from other PHA offices in order to fulfil the duties of their role. It does not impact their contracted place of work.

- 7.2 Staff entitled to claim Business mileage should ensure that home to base return miles are deducted as per normal claiming processes irrespective of whether a staff member attends their base or not as part of any journey on that particular day.

8.0 Security & Confidentiality

- 8.1 Staff are responsible for ensuring the security and confidentiality of PHA property and all PHA data, information, files, documents etc. within their possession. The PHA's Information Governance, Security Policy and Information Security Policies will apply. Staff should ensure they complete mandatory eLearning in Information Governance and Cyber Security.
- 8.2 It is the responsibility of all staff to ensure the safety and security of any documentation containing personal data in transit, and whilst at home, and that access by unauthorised individuals is not possible at any time. Transporting records from PHA offices requires vigilance and the principles of confidentiality must be maintained at all times. It is anticipated that staff working from home should be working from electronic files and it will only be in exceptional circumstances should paper files should be taken home.
- 8.3 Where there is a breach of confidentiality or loss of data or information asset, this must be reported and managed via the incident reporting process and in accordance with the [PHA Information Governance Strategy](#)

9.0 PHA Equipment and ITS Support

- 9.1 The use of laptops will continue to support the hybrid working model, which will remain the property of the PHA. Staff should return any PHA property they took home to support the emergency pandemic response to the office. Equipment provided will remain the property of the PHA and must not be used by other members of the household. These items must be returned should the hybrid worker cease employment with the PHA or if a member of staff is suspended from work during an investigation process.

- 9.2 Where equipment is provided, the PHA will be responsible for the service and maintenance of the supplied equipment. Any concerns regarding PHA equipment must be immediately raised with the Line Manager.
- 9.3 An application for hybrid working may be refused if there is not sufficient funding to accommodate all equipment necessary to effectively perform the duties at home.
- 9.4 Staff will be held responsible for the loss or damage to equipment where requirements of the Information Security Policies have not been observed. The matter may also be investigated in accordance with the PHA's Disciplinary Procedure.
- 9.5 Any ICT equipment that requires physical repair or complex troubleshooting should be delivered to the ITS Department. There may be a requirement for the member of staff to work from their contracted place of work when equipment is being repaired. ITS staff will not be required to visit the member of staff's home. The employee will be responsible for connecting up the equipment themselves e.g. connecting screens, keyboard, mouse and power to docking stations / pc base units.
- 9.6 Connecting to home broadband (Wi-Fi) is the responsibility of staff and therefore the member of staff should contact their home broadband provider for support. Staff will be responsible for any additional or improved Broadband costs. Home devices such as printers should not in any circumstance be connected to PHA equipment without ITS approval.
- 9.7 ITS cannot provide replacement devices without notice, therefore in the interim period staff will have to attend work 5 days per week (pro rata for part time).

10.0 Insurance

- 10.1 As a public body the PHA is self-insured, however in this context the PHA will be responsible for cover of any equipment supplied by them and the employee liability for use of the equipment.
- 10.2 Home Insurance is the responsibility of the member of staff.
- 10.3 The PHA will not accept liability for damage caused to the home or its contents.

10.4 The member of staff is responsible for informing their insurers, mortgage lender etc as required, if they are working from home on a regular basis for any part of the working week.

11.0 Recovery of PHA Property

11.1 On the cessation of hybrid working, for whatever reason, any specific PHA property used to facilitate home working and data must be returned to the line manager of the appropriate department. Should a member of staff fail to return any PHA property then the member of staff will be financially liable. In the case of a member of staff resigning their employment, withholding of any final salary payments will be applied and or further action deemed as appropriate by the PHA.

12.0 Monitoring and Review

12.1 The line manager must retain a record of the risk assessment for a period of 5 years. The member of staff must inform their line manager if there is any significant change to their working at home activity or the location of equipment used. If such a change does occur e.g. the member of staff moving home, then a new risk assessment must be carried out.

13.0 Scheme Review

13.1 The Scheme will be reviewed periodically. Changes may be made following normal consultation arrangements or should exceptional circumstances arise and/or if there are relevant legislative changes.

