



## Social Service Agency Remote First Workbook

Welcome to our Remote First workbook for Social Service Agencies. This is a short exercise in relooking at your organization in terms of retaining remote workers and making Remote First work as a strategy for your organization. Using our workbook, you may come up with some do-it-yourself strategies to steer your company in new directions. Some may require more planning, resources, or other support. Please feel free to reach out if needed at the links at the bottom.

### Remote First Planning Topics

1. Ensure that all staff members and clients have access to the necessary technology and equipment, such as computers, internet access, and secure communication platforms.

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2. Develop clear policies and procedures for remote intake and case management services, including guidelines for communication, confidentiality, and data security.

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3. Train staff on the use of remote technologies and communication platforms, including how to troubleshoot technical issues and ensure privacy and security.

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4. Screen clients for eligibility for services and ensure that they meet any required criteria before providing remote services.

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5. Conduct remote intake sessions using secure communication platforms and ensure that all necessary information is obtained and documented.

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6. Develop individualized service plans for clients, including goals and objectives, and regularly update them based on client needs and progress.

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7. Provide ongoing case management services using secure communication platforms, including regular check-ins with clients and referral to other services as needed.

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8. Ensure that remote services are integrated into the client's overall care plan and that all necessary information is shared with other providers involved in the client's care.

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9. Monitor and evaluate the effectiveness of remote intake and case management services, gathering feedback from clients and staff and making improvements as needed.

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10. Develop cultural competence among staff members to ensure that they can effectively communicate and provide services to clients from diverse backgrounds.

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11. Provide language assistance to clients who may have limited English proficiency, including translation services and bilingual staff.

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12. Develop outreach strategies to ensure that clients are aware of remote intake and case management services and know how to access them.

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13. Develop disaster preparedness plans that include contingency plans for providing remote services in the event of an emergency or natural disaster.

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14. Ensure compliance with all relevant regulations and standards related to remote services, including HIPAA regulations and data security standards.

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15. Develop evaluation metrics to assess the effectiveness of remote intake and case management services, including client outcomes and satisfaction rates.

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16. Establish a clear communication plan for staff members and clients, including regular check-ins, response time expectations, and escalation procedures for urgent situations.

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17. Ensure accessibility for clients with disabilities: Ensure that remote services are accessible for clients with disabilities, including providing accessible communication platforms, captioning or interpreting services, and accessible documents.

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18. Develop strategies for clients who may experience increased social isolation due to remote services, such as connecting them to virtual support groups or other resources.

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19. Train staff on trauma-informed care principles and ensure that remote services are provided in a trauma-informed manner.

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20. Develop strategies for addressing technology literacy among clients who may have limited experience or comfort with technology, such as providing training or support to use remote communication platforms.

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