



Telework Suitability Tool

Office of Financial Management
April 2018



How to Determine Telework Suitability

This document will help you determine whether telework for a particular position is suitable. Once a determination is made, employees should be made aware of the reasons for the determination.

Telework determinations can be made at three levels: the potential at the job classification level, the suitability of the position for telework and the approval of the employee.

Follow the guidance below to make determinations at the position level and for an employee.

Step 1

A suitable position is defined as a position that has responsibilities that can be, at any given time, conducted from a remote location without affecting service quality or organizational operations. This analysis is based on the work to be done, not on the employee.

Determine suitability of a position by asking:

Can any of the job duties be done anywhere other than the office?

Yes = Suitable

No = Unsuitable

OR

Does the position require daily 100% on-site performance of work?

Yes = Unsuitable

No = Suitable

Examples of responsibilities that are suitable for teleworking:

- ✓ accounting
- ✓ analyzing data
- ✓ auditing reports
- ✓ calculating
- ✓ computer programming
- ✓ phone work
- ✓ data entry
- ✓ design work
- ✓ drafting
- ✓ editing
- ✓ evaluations
- ✓ graphics
- ✓ work planning
- ✓ preparing budgets
- ✓ programming and monitoring contracts
- ✓ project management
- ✓ reading
- ✓ report writing
- ✓ research
- ✓ software development
- ✓ spreadsheet analysis
- ✓ typing
- ✓ word processing
- ✓ web training
- ✓ writing

If the position is classified “*unsuitable*” consult with the appointing authority of the division for concurrence. If the decision remains, inform your Human Resource consultant. (This process can also be conducted by HR.)

Step 2

This analysis is based on the employee if the employee works in a position that is suitable for teleworking. Employees in suitable positions can volunteer to participate in the telework program.

Once the position has been determined suitable, an interested employee working in that position can take a self-assessment (example below) before making a request for teleworking to see if they are a good candidate for the arrangement.

The supervisor approves the teleworking arrangement for the employee. Supervisors should review the characteristics of a successful teleworker, listed below. Have a conversation with the employee with a “start from yes” or “let’s try it” approach.

Base approval on performance. The employee should have no active, formal disciplinary and/or corrective actions on file for the current or immediately preceding appraisal period. Act upon the request within two weeks or whatever you agency policy suggests.

Characteristics of a good teleworker:

- ✓ Requires minimal supervision
- ✓ Requires minimal social interaction
- ✓ High level of job knowledge and skill
- ✓ Prefer alternative office environments at least sometime
- ✓ Is self-motivated
- ✓ Wants to telework
- ✓ Is well organized
- ✓ Demonstrates a high level of productivity
- ✓ Comfortable working alone
- ✓ Has a reliable work history
- ✓ Has a full understanding of the operations of the organization
- ✓ Trusts supervisors
- ✓ Establishes priorities and manages time
- ✓ Likes to work independently
- ✓ Writes a to-do list for each workday
- ✓ Schedules/plans work ahead
- ✓ Knows job goals and objectives
- ✓ Keeps in touch with supervisor
- ✓ Informs supervisor when a deadline can’t be met

If the employee will be approved for telework, ask the employee to follow the agency approval processes defined in agency policy or directed by management.

If an employee will not be approved for telework for reasons other than performance, it is recommended you consult with your HR consultant before talking to the employee. If the nonapproval is due to performance, it is recommended the supervisor consult with their direct manager for concurrence. If the decision is affirmed, it is then recommended you inform the appointing authority and consult with your HR consultant before talking to the employee.

Telework Employee Determination Checklist Tool (to be completed by supervisor)

This tool will assist in determining whether telework is appropriate for an employee. If the answer to any of the following questions is “no,” it is suggested that telework is not an appropriate option. Please consult the HR consultant if a “no” is selected. Attach all documents to support your “no” answer(s).

- | | | | |
|-----|---|------------------------------|-----------------------------|
| 1. | The employee is self-motivated and responsible. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 2. | The employee is able to work independently. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 3. | The employee is familiar with the job requirements. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 4. | Many of the employee’s duties may be performed remotely. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 5. | The employee is aware of the agency’s procedures. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 6. | The employee meets standards in his/her current position. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 7. | The employee is an effective communicator. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 8. | The employee is not currently serving a probationary trial or service or transition review. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 9. | The employee has not received corrective or disciplinary action in the last year. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 10. | The supervisor is committed to discussing expectations of the telework day with the employee. | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

Telework Employee Self-Assessment Tool

(to be completed by employee seeking telework arrangement)

A successful telework employee has a job suitable for telework and a telework-ready office.

Read each of the sections below and check the box that most accurately describes you or your situation. Your self-assessment will help you decide whether telework is right for you.

1. Successful telework employees develop regular routines and are able to set and meet deadlines. Are you self-motivated, self-disciplined and able to work independently? Can you complete projects on time with minimal supervision and feedback? Are you productive when no one is checking on you or watching you work?

Always Usually Sometimes Not really

2. Telework employees have strong organizational and time-management skills. Are you results-oriented? Will you remain focused on your work while teleworking and not be distracted by television, housework or visiting neighbors? Do you manage your time and workload well, solve many of your own problems and find satisfaction in completing tasks on your own? Are you comfortable setting priorities and deadlines? Do you keep your sights on results?

Always Usually Sometimes Not really

3. Telework employees are comfortable working alone. Can you adjust to the relative isolation of working at home? Will you miss the social interaction at the central office on your telework days? Do you have the self-control to work neither too much nor too little; can you set a comfortable and productive pace while working at home?

Yes No

4. Telework employees should have a good understanding of the organization's "culture." Are you knowledgeable about your organization's procedures and policies? Have you been on the job long enough to know how to do your job in accordance with your organization's procedures and policies? Do you have well-established work, communication and social patterns at the office?

Yes No

5. Telework employees should have effective working relationships with coworkers. Have you determined how to support coworkers while working at home? Have you and your supervisor evaluated the effects of your telework days and those of your coworkers in maintaining adequate in-office communication?

Yes No

6. Telework employees need to be adaptable to changing routines and environments. Have you demonstrated an ability to be flexible about work routines and environments? Are you willing to come into the central office on a regularly scheduled telework day if your supervisor, coworkers or customers need you there?

Yes No

7. Telework employees need to be effective communicators and team players. Do you communicate well with your supervisor and c-workers? Are you able to express needs objectively and develop solutions? Have you developed ways to communicate regularly with your supervisor and coworkers that you can use when you telework?

Yes No

8. Current job performance is a strong indicator of your potential success as a telework employee. Consider how any problems or developmental needs might affect your telework experience. Are you successful in your current position? Do you know your job well? Do you have a track record of performance?

Yes No

9. Do you have the right job for telework?

- Job responsibilities that can be arranged so there is no difference in the level of service provided to the customer.
- Minimal requirements for direct supervision or contact with the customer.
- Few face-to-face communication requirements with the ability to arrange days when communication can be handled by telephone or email.
- Minimal requirements for special equipment.
- Ability to define tasks and work products with measurable work activities and objectives.
- Ability to control and schedule workflow.

10. Do you have an appropriate telework environment?

- A safe, comfortable workspace where it is easy to concentrate on work.
- The level of security required by the agency.
- The necessary office equipment and software that meet agency standards.
- A telephone, with a separate home office line if required, and an answering machine or voicemail.
- Household members who will understand you are working and will not disturb you.

Are you the right kind of worker? If your answers to Questions 1 through 8 are “Always,” “Usually” or “Yes,” you’re the kind of employee likely to be successful at telework.

Do you have the right kind of job? You should be able to check every bulleted item under Question 9.

Do you have the right home environment? You should be able to check every bulleted item under Question 10.