Sample Pre-Telework Worksheet

Tasks A, B and C are intended for the entire workgroup—teleworkers, manager, and co-workers. They are best handled with everyone sitting down together to discuss the issues. Tasks D through G are for each individual teleworker to work out with the manager.

A. TELEWORKER SCHEDULE AND HOURS (Teleworkers, Manager & Workgroup)

1. Number of teleworkers in work group:

2. What are the telework days and hours for each teleworker?

   Teleworker

   Teleworker

   Teleworker

3. What are specific days that teleworkers need to be in the office (for meetings, status updates, training)?

4. Determine who needs to know the weekly teleworker schedule. Manager, support staff, team members, project leader, receptionist, other departments:

5. How will this weekly schedule be disseminated? Who will be responsible for keeping it updated?

6. What impact, if any, will the selected telework days and hours have on other work group members' schedules? Will it affect back-up duties or customer coverage?

7. How will this schedule or schedule changes be communicated to others? (i.e., "I am teleworking" sign on desk or computer monitor, stated on teleworker voice mail, email, not mentioned, other)

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8. If teleworker is sick on the telework day, what should they do?

   Who is responsible for letting other office staff know? (teleworker, manager, other)

9. Will there be any desk sharing or space changes in the primary office when telework begins? If so, what will be done to smooth this transition?

B. TELEWORKER WORK TASKS AND PROCESSES (Teleworker, Manager & Workgroup)

1. What tasks will be performed by teleworker(s) on telework days?

2. What tasks are best done at the primary office?

3. Do teleworkers work cooperatively with work group members on specific tasks that will be accomplished on telework days? If so, how will information be shared or exchanged?

4. What teleworker work tasks will need to be assumed by other in-house staff when teleworker(s) are offsite?

   <u>Examples of tasks that may need coverage</u>:
   Meeting with walk-ins   Forwarding or sending information
   Printing jobs in the office   Taking and forwarding messages for teleworker
   Taking customer calls   Serving as emergency back-up in primary office

   Who will take on these extra duties?

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5. If the teleworker does need some occasional support from in-house staff, is the teleworker able to reciprocate or assist in-house staff in any other way?

6. With the teleworker offsite, what changes in work processes may be needed? For example, how materials are distributed, need for face-to-face encounters with staff other than work group, etc.

C. COMMUNICATIONS AND MESSAGING PLAN (Teleworker, Manager & Workgroup)

1. What regular communications are needed with coworkers on telework days?

2. What are the most effective communication modes to stay in touch with the workgroup members?

Second phone line	☐ Yes	☐ No
Voice mail at main office	☐ Yes	☐ No
Separate voice mail at home	☐ Yes	☐ No
E-mail	☐ Yes	☐ No
Conference calling feature	☐ Yes	☐ No
Cellular phone	☐ Yes	☐ No
Beeper or pager	☐ Yes	☐ No
Caller ID	☐ Yes	☐ No
Call waiting	☐ Yes	☐ No
Blackberry	☐ Yes	☐ No

   Other (specify):

4. If applicable, what kinds of calls should the receptionist forward immediately?

5. Will the teleworker's home telephone number be given out, to whom and under what circumstances?

6. What is the policy for giving teleworker's home number to customer or other department staff outside of the work group?

7. How will telephone and other communications with customers remain seamless on telework days?

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8. How often will the teleworker and work group check voice-mail messages?

9. How often will the teleworker and work group check email per day?

10. What times will the teleworker be available to accept calls from the office?

11. How is teleworker reached in an emergency?

12. Are there any changes in routing and mail procedures?

13. Teleworker Buddy—A teleworker buddy is a coworker who acts as a primary office liaison when a teleworker is at the remote work site. Two teleworkers can become partners; each helps the other with telework needs. Will the teleworker set up a buddy system? If so, with whom?

14. When and how often is attendance required at regular staff meetings?

15. What are alternatives for decreased 1-1 coworker interactions due to less spontaneous, informal meetings?

16. In what situations will there be a need for the teleworker to attend unscheduled face-to-face meetings?

17. How much notice will the teleworker have ahead of time?

18. What are the best strategies for the teleworker to reach the manager? (email, voice mail, other)

19. Please specify how the teleworker will maintain a professional demeanor on the home and office phone lines. What message will be left on office voice mail on telework days?

20. How will the teleworker answer the home office phone (business response) if they intend to receive business calls on that line?

22. What message will be used on the home answering machine or voice mail, if that line is being used for business calls?

23. Does this message need to be changed on telework days if family members use this phone after business hours?

24. How often will teleworker and supervisor meet to discuss and evaluate telework arrangement (monthly 1-1; meeting with coworkers; with other teleworkers)?

Telephone Courtesy Tips:

- Develop a system of contacting the teleworker that is courteous. Be sure there is a way to leave a message when the teleworker cannot answer the phone.
- When teleworkers do answer the phone, be aware that, just as when one calls someone at any other office, your call could be coming at an inconvenient time. Ask if they have time for your call. If they do not, let them know how long you think the conversation will be and suggest another time to talk.
- Have an agreement that work group members will leave messages when they call. The teleworker will then know that the hang-up on the answering machine or voice mail is not an annoyed manager or coworker.

D. PERFORMANCE GOALS AND OBJECTIVES (Manager & Teleworker)

As a regular office setting, in order to assess performance, it is important to understand:

1. What are the quantifiable products (how much gets done) that will be produced on telework days?

2. How will the quality of work be assessed (how well it gets done)?

3. Will deadlines be established for completion of work? If so, how will these be determined?

4. What telework tasks will take priority?

E. WORK AND FAMILY GUIDELINES (Teleworker & Manager)

1. If household members are home during the workday what kind of phone use by household members occurs between 8 a.m. and 5 p.m.?

2. What are the guidelines for phone line use by household members during the telework day? Will it be restricted during work hours?

3. What are the guidelines regarding privacy, interruptions, and use of work area?

4. When is it not okay for a household member to interrupt the employee?

5. Is it clear that household member use of employer equipment and work area is not permitted?

6. Dependent Care—Telework is not a substitute for dependent care, although if the teleworker's position and circumstances permit, work schedules may flex around dependent care needs. Dependents may include children, babies, elders or other family members who are in the home during work hours.

   If another caregiver in the home cares for the dependent, then the home office should be removed enough from the dependent's location that there is not distraction for the teleworker.

   a. Can the employee's schedule be flexible in order to accommodate some dependent care needs? If so, please describe the schedule:

   b. If a dependent (child or adult) is sick or home without care on a telework day (for instance, on snow days), what should the teleworker do? Is she/he able to perform some work duties? (Sometimes the teleworker could work a portion of the day. The manager may require the employee to use leave or partial leave. This may also depend upon the age of the dependent and the type of work tasks.)

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F. SECURITY AND CONFIDENTIALITY (Teleworker & Manager)

1. What documents or data are allowed in the home office?

   Which are not?

2. How will confidential materials be safeguarded in transit?

3. What disks or documents need to be available at primary office for other work group members?

4. How should documents be destroyed?

5. What is the return policy for documents?

6. If employee owned equipment is used, how will the security of NIH information or data be maintained? (password, etc.)

G. TECHNOLOGY, WORK SUPPLIES AND RESOURCES (Teleworker & Manager)

Equipment should be documented in the telework agreement, designating whether it is employee or NIH provided property.

1. Will the IC provide any maintenance or assistance with employee-owned equipment (particularly computer software and hardware)? If so, what is this assistance?

   If not, does the teleworker have maintenance agreements in place for employee-owned equipment?

2. Are there any standards set by your IC IT group for employee-owned equipment? Does the equipment meet these standards?

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3. Who is the contact for assistance with NIH-owned equipment? List names/contact information below, alongside the type of equipment they are responsible for:

4. If a key piece of equipment (for example, the computer) ceases to function on a telework day and cannot be fixed immediately, what should the employee do?

5. What types of computer applications will teleworker(s) need access to? Are there any issues associated with accessing these applications from a remote location?
   - ☐ Windows
   - ☐ Internet browser
   - ☐ Word Processing, (Word, WordPerfect)
   - ☐ Database – specify:
   - ☐ E-mail
   - ☐ Other(s):

   Issues:

6. Will teleworker need to have any applications open simultaneously? If so, which?

7. What restrictions, if any, does NIH, the IC, or workgroup place on remote use of applications?

8. What supplies and resources will be given by the IC (paper, pens, printer cartridges, reference books, etc.)?

9. How will teleworker obtain these supplies?

10. What additional expenses might the teleworker incur? Will these expenses be covered? If so, how?