

# PROCEDURES: Telework

Florida Department of Revenue



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## Policy

### [Telework Policy](#)

## Procedures

The Department of Revenue's (Department) Telework Procedures are designed to provide guidance to Department employees regarding the Department's telework program.

### A. Procedures for Telework Participation

#### Steps for Required Telework

1. Each year, supervisors shall review their established positions to determine if they are eligible for telework. Supervisors should refer to the [Manager's Guidelines for Evaluating a Position's Eligibility for Telework](#).
2. When filling a position that has been designated as a Required Telework position, or when temporary telework exceeds 30 consecutive workdays unless extended by the program director, the supervisor instructs the employee to complete the [Department's Telework Agreement](#). The supervisor will then proceed to [Step 4](#) under the Steps for Optional Telework.

#### Steps for Optional Telework

1. An employee who wishes to be approved for optional Telework must complete the [Employee Individual Self-Assessment for Telework](#) and complete and submit the [Department's Telework Agreement](#). The employee must be meeting all established performance expectations. Probationary employees must be making satisfactory progress toward successful completion of their probationary period.

2. The supervisor shall evaluate whether the employee has the knowledge, skills, abilities, work habits, and performance record suitable for telework and if telework supports the business operations of the program. In making this evaluation, the supervisor should consider whether telework could result in any negative impact on the program which may include, but is not limited to:
  - a. A reduction of the individual's or work unit's productivity.
  - b. A reduced level of service provided to Department customers.
  - c. An increase in the cost of Department operations.

Supervisors should discuss with their managers any impacts beyond the immediate work unit.

3. The supervisor determines whether telework is suitable under the circumstances listed in [Step 2](#) and whether the team member is in a [telework eligible position](#).
  - a. If yes, the supervisor should proceed to [Step 4](#).
  - b. If no, the supervisor shall communicate with the program approver (process manager/ service center manager or above) regarding denial of the telework request.
    - i. If the program approver agrees with the denial, the supervisor will inform the employee of the denial in writing. If the employee lacks some of the characteristics for telework, the supervisor may offer suggested efforts or improvements that would help enable the employee to successfully work at an alternative worksite in the future.
    - ii. The supervisor will complete the "Denial" section of the telework agreement, including the reason for denial. The supervisor will forward the form to the program approver.
    - iii. The program approver will complete the "Denial" section of the telework agreement.

If the supervisor isn't sure whether telework is suitable, or if the supervisor needs more information to make an informed decision, he or she should discuss the matter with the program approver.

4. Complete telework training.
  - a. Employee completes Telework Training for Employees.
  - b. Supervisor completes Telework Training for Supervisors.
5. The employee will complete the [Alternative Worksite Safety Checklist](#) and send it to his or her supervisor. The supervisor will review the checklist and verify that the alternative worksite meets the requirements for telework.
  - a. If yes, the supervisor will sign and place the checklist in the staff administration file with a copy of the completed telework agreement.
  - b. If no, the supervisor will work with the employee to take any necessary corrective actions and then sign and place the checklist in the staff administration file with a copy of the completed telework agreement.
6. The employee and the supervisor will determine the equipment needed to telework. The supervisor will follow normal program procedures to ensure the availability of necessary

equipment, furniture and resources for the employee to telework, including properly documenting their physical location.

- a. The Department will provide computer equipment and mobile devices for job duties that involve accessing, storing, and processing state and federal tax information (FTI) and any other confidential information. Only Department-owned mobile storage devices are authorized to store confidential data.
  - b. The Department will provide computer equipment for job duties that involve Federal Parent Locator Services (FPLS) information, which must meet minimum security requirements in the Federal Office of Child Support Security Agreement. No employee may access, store or process FPLS information on mobile devices or from a public wireless connection.
  - c. Employees who work with FTI or FPLS may be subject to equipment and worksite inspections to comply with Section 2.5, Coordinating Safeguards within an Agency, of [IRS Publication 1075](#).
7. The supervisor submits the completed telework agreement and approval recommendation to the program approver.
8. The program approver will approve or deny the request. If approved, they will keep a copy in their staff administration file and the Office of Workforce Management will activate the Telework Indicator for the employee's position in People First.
9. The employee will refer to the Department's Telework Training for Employees to set up his or her telework site.
10. The employee will work with technical support staff to ensure required security measures are in place prior to starting to telework. This includes:
  - a. The employee will work with local technical support staff to ensure equipment has necessary hardware installed correctly, such as ethernet cable and monitor cable.
  - b. The employee will work with the Service Desk or local technical staff to ensure equipment has the correct security setting protocols and necessary software installed correctly.
  - c. The employee should contact the Service Desk or local technical staff for any remote access support.
  - d. Alternative worksites must have secure wireless connections so that data transmissions cannot be intercepted.
  - e. Employees using a wireless router must follow the Department's Wireless Home Guidelines.
  - f. The employee will submit a list of all equipment that will be taken to the alternative worksite to their supervisor using the Alternative Worksite Equipment List within five (5) business days of beginning work at the alternative location. The list should be updated any time there is a change to the equipment at the alternative worksite.

Department technical support staff can provide guidance about router security. However, the employee is ultimately responsible for ensuring the security and effectiveness of personally owned routers.

11. The supervisor and the employee will maintain ongoing communication with each other, coworkers, and customers.
  - a. The employee is responsible for providing the supervisor and coworkers their contact information when teleworking. The employee must be available by phone and email during scheduled work hours.
  - b. With supervisor approval, the employee may forward their office phone to the alternative worksite phone. The employee is required to check their office phone voicemails at least daily or as directed by their supervisor.
  - c. Employees using personal telephones shall use appropriate voicemail greetings when working at the alternative worksite. Voicemail greetings on a personal telephone used for work purposes should not contain language or audio that would be considered inappropriate for a voicemail greeting on a Department telephone.
  - d. If the employee needs to leave his or her alternative worksite, or otherwise stop working during scheduled work hours, he or she must first request and obtain supervisor approval for leave as if the employee were working at the official worksite.
12. The supervisor shall ensure the employee follows the terms of the telework agreement, all performance expectations in the employee's performance plan, work requirements, and Department policies and procedures.
13. Department-owned equipment, records, confidential information, software, and other state property must be protected against damage and unauthorized use. Teleworking employees must use approved Department safeguards to protect state equipment, supplies, and records from unauthorized disclosure or damage. Failure to comply with this procedure may result in immediate termination of the telework agreement and/or corrective action.
14. The employee shall immediately notify the supervisor if the employee needs to request a change to the approved alternative worksite or schedule and will complete a new telework agreement. Supervisors may approve a temporary alternative worksite as necessary to allow an employee to continue operations.
15. If the supervisor requires a modification to the employee's telework arrangement, the supervisor provides the employee with at least 15 calendar days' written notice prior to the modification using the Telework Modification Template and the employee and supervisor must complete a new telework agreement.
16. The employee should immediately notify the supervisor if the employee is unable to perform work at the alternative worksite due to circumstances beyond his or her control, such as power outage or loss of internet access. Employees may be asked to return to the official worksite.

#### **Steps for Temporary Telework**

1. When the Department or program requires temporary telework, the supervisor shall notify the employee in writing of this requirement. If the temporary telework exceeds 30 consecutive workdays, the employee and supervisor must complete the telework agreement for required telework, unless the program director extends the timeframe.
2. An employee may request, in writing to their supervisor, approval to telework on a temporary basis not to exceed 30 consecutive workdays to meet personal needs. The request shall include

the specific reason or reasons and duration the temporary telework is needed. This type of request does not require the completion of a telework agreement. If the temporary telework exceeds 30 consecutive workdays, the employee and supervisor must complete the telework agreement for optional telework if telework is approved to continue.

## **B. Procedures for Terminating Telework Participation**

If, at any time, the employee's telework arrangement is determined not to be in the best interest of the Department or program the supervisor may recommend termination of the telework agreement following the steps below:

1. The supervisor will complete a Telework Termination Form recommending termination of the telework agreement. The supervisor will forward the form, together with an explanation and/or supporting documentation, to the program approver.
2. The program approver will make a final decision regarding termination of the telework agreement.
  - a. If the program approver agrees with the termination of the telework agreement, the program approver will:
    - i. Forward electronic copies of the Termination Form to [AskHR@floridarevenue.com](mailto:AskHR@floridarevenue.com).
    - ii. Notify the supervisor and the employee of the termination of the agreement.
  - b. The supervisor will notify the employee, in writing, at least 30 calendar days' prior to the termination using the Termination Notification Template, to return to work at the official worksite.
  - c. The supervisor will notify program staff responsible for agency secure access, telecommunications, computer equipment, or other Department resources used to perform work at alternative worksites.
  - d. If the telework agreement is terminated, the employee will be responsible for the prompt return of all Department equipment, records, and any other state property to the official worksite.
3. Upon receipt of the Telework Termination Form, the Office of Workforce Management will deactivate the telework indicator in People First.
4. If participation is terminated as a result of the employee separating from the Department, the supervisor will complete all tasks outlined on the Department's Separation Process – Step by Step web page.

## **Frequently Asked Questions**

N/A

## **Definitions**

- **Alternative worksite** – The teleworking employee's approved work location away from the official worksite.
- **Confidential Information** – Information that is prohibited from disclosure under the provisions of applicable state or federal law, rules, or regulations.

- **Official worksite** – The Department office location where the employee is assigned. Exceptions may be granted for employees located in the field where there is no established office, per section 112.061(4), F.S. In these cases, the official work headquarters will be the location where the majority of the employee’s work is performed, or such a location that may be designated by the executive director that is in the best interest of the Department and not for the convenience of the employee. An employee may have only one official work headquarters.
- **Regular basis** – Scheduled telework away from the official worksite that is planned, recurring, and predictable.
- **Telework** – A work arrangement that allows an employee to conduct all or some of their work away from the official worksite during all or a portion of the employee’s established work hours on a regular basis.
- **Telework Agreement** – The agreement between an employee approved to work at an alternative worksite and the Department of Revenue that spells out the terms and conditions of the employee’s participation in the Telework Program.

## Authority/Reference

[Sections 20.05](#) and [20.21](#), Florida Statutes (F.S.)

[Rule 12-3.007](#), Florida Administrative Code (F.A.C.)

[Section 110.171](#), F.S.

[Section 255.249\(8\)](#), F.S.

[Rule 60GG-2](#), F.A.C.

[Employee Individual Self-Assessment](#)

[Guidelines for Developing Alternative Work Strategies](#)

[Department of Management Services' \(DMS\) "Identifying Positions Appropriate for Telework and Determining Employee Eligibility"](#)

Confidential Information Policy and Procedures

Protection and Use of Information Technology Resources Policy and Procedures

[IRS Publication 1075, Tax Information Security Guidelines for Federal, State and Local Agencies](#)

## Policy Owner

Deputy Director

Office of Workforce Management

Tallahassee, Florida

## Key Contact

Planning and Operations Manager

Office of Workforce Management

Tallahassee, Florida

p: (850) 617-8370

## Date Signed and Revision History

Effective Date	Explanation
05/21/2021	Executive Director signature on file with the Office of Workforce Management
Origination Date	Explanation
08/1991	State Employee Telecommuting Pilot Program
Last Reviewed Date	Explanation
05/1995	Revenue Telecommuting Program Operating Procedures.
10/1997	Revised Telecommuting Program Internal Operating Procedures.
11/2003	<p>Revenue Telecommuting Policy and Operating Procedures.</p> <ul style="list-style-type: none"> <li>Information Security Program's Telecommunications Section responsible for: <ul style="list-style-type: none"> <li>Serving as initial point of contact for telework equipment and service questions.</li> <li>Development and maintenance of agency-wide job classification/position eligibility list, the Telecommuter Information Database and the Telecommuting Model Office Template.</li> </ul> </li> <li>Established telecommuting representatives in each program.</li> <li>Revised telecommuting approval authorities to include service center managers and regional managers.</li> <li>Updated and revised forms.</li> </ul>
09/2010	<p>Revenue's Virtual Office Policy</p> <ul style="list-style-type: none"> <li>Created in conjunction with Revenue's Work Hours Policy to achieve multiple strategic objectives, including leased space reduction, recruiting, retention, and continuity of operations.</li> <li>Provides policy and procedural guidance to Revenue teleworkers, their supervisors, managers and others.</li> <li>Creates and defines telework classifications. Employees who telework occasionally, those who telework after scheduled work hours, and employees who telework as a reasonable accommodation under the Americans with Disabilities Act, are included.</li> <li>Coordinators in each program serve as initial contacts and perform other administrative duties.</li> <li>Updates and revises forms. Provides for telework training.</li> </ul>
10/2011	<p>Administrative changes:</p> <ul style="list-style-type: none"> <li>Updated contact information.</li> <li>Removed reference to specific numbered section of the Standards of Conduct.</li> <li>Updated policy template.</li> </ul>
08/2015	<p>Telework Policy</p> <ul style="list-style-type: none"> <li>Changed strategic direction and classifications.</li> </ul>

	<ul style="list-style-type: none"> <li>Excluded those who telework occasionally, those who work remotely after scheduled work hours, and employees who telework as a reasonable accommodation under the Americans with Disabilities Act.</li> </ul>
01/2016	Administrative changes: Update Telework Training links
05/2021	<ul style="list-style-type: none"> <li>Removed Program Director Level review: only supervisor and program approver (process/service center manager or above).</li> <li>Simplified the agreement – moved safety checklist to procedures, removed equipment list.</li> <li>Eliminated program Telework Coordinator responsibility.</li> </ul>