

Supervisor Guide to Telework Approval

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# **The Telework Journey**

The purpose of this guide is to instruct and assist supervisors in moving their employees through the telework approval process. This process follows the orientation received by supervisors called ‘Managing the Telework Journey.’ The process makes use of:

* An electronic routing system for telework approvals. This is known as the Enterprise Telework Solution
* Telework Agreements
* Discussions between employees and supervisors

This approval process is known as ‘The Telework Journey.’

# **The Telework Journey Roadmap**

The Journey has twelve steps and there are four major parties involved in the approval process. These parties are:

* Agency Telework Coordinator (ATC)
* Supervisor
* Employee
* Enterprise Telework Solution (solution)

The first two steps are completed by the ATC to set up employees in SAP to begin their telework requests. Supervisor responsibilities begin in Step 3. The supervisor steps differ from the employee steps in the “Employee Guide to Telework Approval.” To clarify where the journeys align, a **(Employee Step Number)** is included directly under the Step Number title in the “Guide to Individual Steps in the Approval Journey.”

# **The Enterprise Telework Solution**

To access and complete staff telework requests, supervisors will need to access the Enterprise Telework Solution through Employee Self-Service (ESS). Supervisors will access the workflow solution by clicking the ‘Telework Requests for Supervisor’ tile grouped under the ‘Supervisor’ tiles. Supervisors will access pending requests, input notes, upload completed agreements, and enter employee telework start dates through this tile.

### **Tile Menu Navigation**

After clicking the tile to access the solution, the supervisor will be directed to the tile menu. On the left side is a list of employee telework requests with the employee’s name, position number, personnel number, and status. If there are no requests, this will be blank. Select employees by clicking on the arrows next to the employee status to open the ‘Telework Request Details’ screen. On this screen the supervisor can review the employee’s details, telework information, agreement information, add notes, and view a transaction history for the approval process. These are accessed by selecting the “Information,” “Agreement,” “Notes,” or “History” buttons. The “Information” button includes the employee’s demographic information, workflow status and type of telework request (i.e. full-time or part-time). Supervisors will use the “Agreement” button in Steps 10 and 11 and will use the “Notes” button in Step 6. The “History” button shows a record of various action dates taken during the approval process. The history button can be useful when tracking various actions that have been completed by an employee, supervisor, or ATC during the approval process. The change history is listed for the employee under this button.

### **Employee Statuses Throughout the Approval Journey**

In the Enterprise Telework Solution (solution) the employee will be assigned various statuses throughout the Approval Journey. The statuses are as follows:

* **Requested** - The employee has submitted a telework request.
* **Eligible** - The employee’s request for telework has been approved by the ATC.
* **Ready** - The employee has completed the ‘Telework Management Directive Acknowledgement’ Training and been assigned the Telework Qualification in SAP.
* **Agreement Submitted** - The employee has uploaded and submitted their Telework Agreement.
* **Negotiated** - The employee’s supervisor has finalized the Telework Agreement and entered the employee’s telework start date.

# **Guide to Individual Steps in the Approval Journey**

## **Step 3 - Employee Interest Discussion**

**(Employee Step 1)**

The supervisor’s responsibility in the approval process begins at Step 3. Before employees start the telework approval journey, supervisors should have a discussion with employees regarding their interest in telework. The conversation should not be conducted until the supervisor has undergone the ‘Managing the Telework Journey’ orientation conducted by the ATC. The orientation provides necessary definitions and individual agency program guidance needed to have this conversation.

In this conversation, supervisors:

* Discuss eligibility
* Discuss suitability criteria
* Discuss telework schedules
* Reference the available telework resources such as the telework website, the ‘Employee Guide to Telework Approval’, and the Telework Agreement.

A variety of scenarios may result from this discussion. Please refer to the ‘Telework Scenarios and Information for Supervisors’ document for additional information on how to navigate these scenarios. The document should have been provided by your ATC during the ‘Managing the Telework Journey.’

## **Step 4 - Employee Enter Request for Telework in ESS**

**(Employee Step 2)**

In this step, the employee submits a telework request based on the interest discussion in Step 3. Employees will start the request by accessing the ‘Telework Request’ tile in ESS. After accessing the tile, the employee will be directed to the ‘Telework Request Form.’ The employee will complete the request details at this screen. Employees will need to click the link to review the telework guidelines. After reviewing the guidelines, the employee will select the type of telework schedule they wish from the drop-down menu. The telework type options are part-time or full-time, as defined by your ATC in the ‘Managing the Telework Journey.’ Employees needing to request ad hoc telework should select the part-time option. The employee should select the type of telework based on the interest discussion with the supervisor in Step 3. Not all employees will be eligible or suitable for full-time telework. Please refer to the ATC for guidance. The employee is required to select the check box before clicking the ‘Submit’ button. The employee will then confirm submission.

In the event an employee does not wish to participate in telework, the employee will simply select the “Opt-Out” button. The employee will confirm the Opt-Out and the workflow will stop.

Once an employee has submitted a request form to participate or opt-out, no changes to the request can be made. The employee will not be able to make a duplicate request. The tile will not be available for further action until the ATC has approved the telework request in Step 7 AND the employee has been assigned the Telework Qualification in Step 9, Part 1. If the employee tries to re-access the tile, they will receive a message indicating “You have an existing telework related request and may not make changes. Please contact your supervisor for additional information.”

## **Step 5 - System Notification of Employee Request**

**(Employee Step 3)**

After an employee submits a ‘Telework Request Form’ the solution will generate an email for both the employee’s immediate supervisor and the employee’s ATC. The subject line of the email will read “Employee full name personnel number Telework Request.” The email will list the name of the Enterprise Telework Coordinator (E T C), ATC, Supervisor, and Employee. The bottom of the email will indicate whether a request was made for telework or to opt-out of telework. A request for telework will prompt the supervisor to access their tile via ESS to add notes for the ATC to consider in their review of the request. Instructions for adding notes is outlined in Step 6. There will be a delay in receiving the notification from the solution. To verify the employee has made a request, check the employee’s status in the Enterprise Telework Solution. To do this, the supervisor should access the ‘Telework Request for Supervisor’ tile in ESS. The status should be “Requested.”

## **Step 6 - Supervisor Enters Notes on Telework Request**

After the telework solution generates the request notification, the supervisor has the option to enter notes on the telework request while it is routed to the ATC. To enter a note, the supervisor will need to access the ‘Telework Request for Supervisor’ tile in ESS. After accessing the tile, the supervisor will use the ‘Request List.’ The ‘Request List’ will show the employee’s name, position number, personnel number, and workflow status. Supervisors will select the name of the employee who submitted the request from the ‘Requests List.’ This will prompt the ‘Telework Request Details’ for that employee’s request. After selecting the “Notes” button, the supervisor may enter notes in the text field to accompany the request for the ATC to review. This is not a mandatory step for supervisors. Please adhere to the following note guidance:

* Supervisor notes may be entered related to employee’s suitability determined by the agency, but this is optional.
* Supervisor notes should only relate to an employee being suitable or not suitable.
* Supervisor notes should NOT indicate anything related to discipline or EPRs.

The purpose of the notes is to help the ATC evaluate whether to approve or deny the request. These are not mandatory for the supervisor to complete. An ATC will contact the supervisor or appropriate HR point of contact for any notes indicating ‘not suitable.’ When done typing, supervisors will submit the note.

## **Step 7 - ATC Enters Telework Request Details**

Following the notification of an employee telework request, the ATC will review the request to determine if it should be approved or denied. The ATC will follow agency guidance relating to the Telework Management Directive, Telework Agreement, and their Agency Telework Plan in making the final determination to approve or deny a request. If an ATC denies the request, they will select a rejection reason. If approved, the ATC will prepare a notification that will provide information on next steps for the employee and supervisor.

## **Step 8 - System Notification of ATC Determination**

### **ATC Telework Request Denial**

If the ATC denies a telework request, the ATC will select a reason from a pre-set drop-down menu. The ATC may choose to add additional details in the open text field. Upon submission, the Enterprise Telework Solution will generate a denial email sent ONLY to the employee’s supervisor. The email will show the name of the employee making the request, along with their supervisor’s name, ATC name, and the name of the ETC. At the bottom of the email, the reason for the denial and any other details will be displayed. It is the responsibility of the supervisor to inform the employee making the request of their denial. The employee will not receive a denial notification. If the supervisor is unsure why the request was denied, they should reach out to their ATC or the appropriate HR point of contact. There will be a delay in receiving a notification from the solution. An ATC telework request denial will stop the workflow and remove the request from the workflow process. The employee will not be able to submit a new telework request. If a new request is needed, the employee will need to contact their supervisor who should notify the ATC.

### **ATC Request Approval**

If the ATC approves the employee’s telework request, the ATC will be prompted to generate a notification that instructs the employee and their supervisor on next steps. The email will include a link to the appropriate Telework Agreement based on the employee’s management or union classification. The email will also include a message directing the employee to search for the ‘Telework Management Directive Acknowledgement Training’ in LSO. These details will be displayed at the very bottom of the email underneath the name of the ATC, ETC, Supervisor name, and requesting employee’s name. The email provides details on the employee’s name and type of telework request. It includes the training instructions and instructions on how to complete the Telework Agreement. There will be a delay in receiving a notification from the solution after ATC approval. An ATC approval will also update the status of the employee to “Eligible.” To verify this status change, the supervisor should access the ‘Telework Request for Supervisor’ tile in ESS.

## **Step 9 - Employee Completes the Telework Management Directive Acknowledgement Training and the Telework Agreement**

**(Employee Step 4)**

This step involves two parts. Part 1 must be completed before Part 2.

### **Part 1**

The email notification to employees will instruct them to search for and complete the ‘Telework Acknowledgement’ training in LSO. After completing this training, SAP will assign a Telework Qualification to the employee during an overnight process. This qualification will update the Enterprise Telework Solution to indicate that the employee has completed the training. This step must be completed prior to Step 9, Part 2. The employee will not be able to access the ‘Telework Request’ tile prior to completion. The workflow and telework request cannot be completed until this acknowledgement training has been completed. To verify this step has been completed by an employee check their status in the solution. To do this, the supervisor should access the ‘Telework Requests for Supervisor’ tile in ESS. The status of the employee should be “Ready.”

### **Part 2**

**(Employee Step 5)**

The employee will need to click on the link provided by the ATC in the approval email. The appropriate Telework Agreement must be downloaded to be filled out, saved, and uploaded back into the solution. Agreements are formatted as fillable PDFs. Supervisors should provide technical assistance to their employees, or direct them to the appropriate IT point of contact for ongoing technical troubles with the PDF. Employees should download and complete the following sections:

* Safety self-certification
* Alternate worksite details
* Telework schedule details
* Electronically (digitally) sign and date for the employee

The Telework Agreement PDFs should be completed electronically with typed names as signatures. No printing, wet signatures, or scanning is necessary. Once completed, the employee should save the agreement. The employee will upload the partially completed agreement into the Enterprise Telework Solution. To upload the saved agreement, employees will need to access the solution through the ‘Telework Request’ tile under the ‘Personal’ tile groupings in ESS. This will not be possible until the completion of Step 9, Part 1. After accessing the tile, the employee will be directed to the ‘Telework Request Form’ where the menu title will read “Agreement and Guidelines” in the upper left corner. The link to the appropriate agreement can also be accessed on this screen. The employee will need to select the “Browse…” button and select their completed and saved agreement. Upon successful upload, the employee will select the “Submit” button in the lower right corner and confirm. This will generate an email notification to both the employee’s supervisor and ATC that the agreement has been submitted.

## **Step 10 - Supervisor Completes the Telework Agreement**

After the notification that the employee has submitted the partially completed agreement into the Enterprise Telework Solution, the supervisor should discuss a potential telework start date with the employee. This discussion is a check-in with the employee to verify a start date that the supervisor will enter in the next step. Supervisors should consider the following when discussing a telework start date:

* The current workload and progress of current tasks​
* If the start date impacts or threatens the completion of major projects or tasks​
* The desire and perspective of the employee​​
* If the employee needs to gain electronic access to materials, other resources, or equipment before beginning telework​

Once discussed, the supervisor should verify the employee’s status in the solution has changed from “Ready” to “Telework Agreement Submitted.” The supervisor should verify this status change by accessing the ‘Telework Requests for Supervisor’ tile in ESS. The supervisor will need to download the employee’s partially completed agreement that has been saved into the solution. The supervisor will select the employee’s name from the ‘Requests List’ which will bring up the Telework Request Details for the selected employee. The supervisor will select the “Agreement” button. The supervisor will select the link to the partially completed employee agreement to download and finalize the agreement. The supervisor will verify the employee has accurately completed:

* The safety self-certification
* The alternate worksite details
* The telework schedule details
* The employee’s signature and date lines

Once verified for accuracy, the supervisor will complete the agreement by signing and dating on the supervisor lines. If the employee’s saved agreement has errors, the supervisor should work with the employee outside of the solution to correct the agreement on the supervisor’s version before the supervisor uploads the agreement into the solution, when possible. The supervisor will save the fully completed agreement and upload into the Enterprise Telework Solution. To do this, the supervisor will access the employee request details following the direction provided earlier in this step (Step 10). On the agreement screen, under the ‘Upload Agreement’ section, select the “Browse…” button to select and upload the fully complete and signed agreement for the requesting employee. Pause here before clicking “Submit” or entering the employee’s telework start date.

## **Step 11 - Supervisor Enters Start Date and Submits Agreement**

Before submitting the completed agreement and start date, verify that the discussed telework start date is still suitable for both the employee and the supervisor. If the date needs changed, the new date should be reflected in the “Start Date” field under the “Agreement” button of the employee’s ‘Telework Request Details.’ After the start date is negotiated, ensure the agreement and start date fields are populated. You will need to utilize the calendar icon button to populate the start date in the proper format. Then, select the “Submit” button. After selecting “Submit” confirm the submission. The status of the employee in the solution should change to “Negotiated.” The supervisor can verify this change by accessing the ‘Telework Requests for Supervisor’ tile in ESS.

### **ATC Agreement Completion and Revisions**

After the supervisor has submitted the completed agreement and the start date for the employee’s request, the ATC will review the request, completed agreement, and start date. The ATC will then determine whether to complete the request or to send the request back for revision.

#### **ATC Completion**

The ATC may review the submission components and determine that the request can be completed. If the ATC completes the request, an email notification will be generated that will go out to the requesting employee and their supervisor. The email will list the ATC, the E T C, the supervisor’s name, and the employee’s name. The bottom of the email will list the details for the employee’s request, start date, and “completed.” This will complete the workflow process and the completed agreement will move into the employee’s electronic official personnel file (eOPF). The “Telework Request” tile will remain visible to the employee. Access to the tile will be restricted, and a message stating “You have an existing telework related request and may not make changes. Please contact your supervisor for additional information” will be the only information in the tile.

#### **ATC Revisions**

If the agreement, start date, or another problem is determined by the ATC, the agreement may be sent back for revision to either the employee or the supervisor. When an ATC sends an agreement back for revision, the status of the employee will change from “Negotiated” to “Agreement Submitted.”

##### **ATC Revisions for Employee**

If the ATC sends the agreement to the employee for revision, an email notification will be sent to the employee and supervisor. Similar to other Enterprise Telework Solution emails, the details of the revision will be included at the bottom of the email. The employee should follow the instructions and repeat Step 9, Part 2, ensuring that the proper changes have been made to the agreement before confirming submission. Once submitted, the supervisor will need to follow and complete Steps 10 and 11 making any necessary changes to the start date. If more than one round of revisions is required, follow these directions until the ATC completes the request.

##### **ATC Revisions for Supervisor**

If the ATC sends the agreement to the supervisor for revision, an email notification will be sent to the supervisor only. Similar to other Enterprise Telework Solution emails, the details of the revision will be included at the bottom of the email. The supervisor should follow the instructions and repeat Step 10, ensuring that the proper changes have been made to the agreement. Once the revisions are made, the supervisor will complete Step 11 making any necessary changes to the start date. If more than one round of revisions is required, follow these directions until the ATC completes the request.

## **Step 12 - Post-Approval Training**

**(Employee Step 6)**

After the ATC has completed an employee’s request for telework the employee and the employee’s supervisor will need to complete the mandated trainings.

### **Training for Employees**

Employees will need to complete the ‘Teaming in Telework’ web-based training module in LSO. Employees should complete this training within three months of their approved telework start date.

### **Training for Supervisors**

Supervisors will need to complete the ‘Telework Manager Certification Program’ (TMCP), which is the web-based training curriculum for all supervisors with any teleworking reports. The program consists of three courses found in LSO:

1. Managing for Results
2. Managing Telework Teams
3. Managing for Continued Excellence

Supervisors will also need to complete the ‘Teaming in Telework’ web-based training module in LSO. Supervisors should complete all required training within three months of their own, or their first approved employee’s, telework start date.