

## Getting Started Checklist

The Statewide Telework Policy provides necessary structure for department telework programs to be effective and benefit both the state of California and its employees. As a Telework Coordinator (TWC), you have the responsibility to either update or establish your department telework policy and program. Use the following checklist to help you get started. Many of these tasks and activities can be performed simultaneously.

- **Read the Statewide Telework Policy and learn about the program**  
The Statewide Telework Policy ([SAM 0181](#)) is the foundation for the department telework policy. Understanding and referring to the statewide policy will assist you in developing a department telework program that aligns with the statewide policy.
- **Meet with leadership to begin formulating your department's policy**  
Meet with department leadership early in the development of the telework policy to ensure that the policy supports your department's larger strategic goals.
- **Attend and participate in TWC Forums and Telework Office Hours**  
TWC forums will be held each quarter to share information, ask questions, share challenges and solutions, gain knowledge about the state program and learn how other departments have set up, implemented, and administer their programs. Office Hours (virtual drop-in sessions) will be scheduled to provide assistance in between TWC Forums. The backup to the TWC should also attend the TWC Forums and Office Hours. Submit the department TWC and backup names to [DGSTWCoordinator@dgs.ca.gov](mailto:DGSTWCoordinator@dgs.ca.gov) to be invited.
- **Update and submit your draft department telework policy by 01/31/2022**  
All department telework policies must be updated to align with the [2021 Statewide Telework Policy](#). Refer to the "Policy Directives" section for more details. A draft should be submitted to Department of General Services (DGS) by January 31, 2022. Once final, the department policy will need to be forwarded to the department Labor Relations Officer to provide notice to the appropriate Labor Union. Refer to the Statewide Telework website, [Telework Coordinator](#) page for assistance.
- **Work with leadership to determine department positions eligible for telework**  
Consider all possible positions for which telework can promote effective and efficient business operations while maintaining the necessary level of service delivery. Ensure that all staff are notified of their eligibility. Reference [Eligibility](#) information on the Statewide Telework website.
- **Ensure teleworkers are designated as either remote-centered, office-centered, or eligible to telework**  
A teleworker is considered remote-centered if they work fifty percent or more of their time from an alternate work location. A teleworker is considered office-centered if they work more than fifty percent of their time in the office. An eligible employee is one whose essential job duties are conducive to telework. Keep track of the designation for teleworkers retroactive to October 1, 2021 and prepare to submit monthly data to DGS beginning in January 2022.
- **Document teleworking arrangements for each teleworker using the Telework Agreement (STD. 200)**  
Once the departmental policy is implemented, all teleworkers with an existing telework agreement must replace it with an approved STD. 200 form. The agreement must be renewed annually thereafter. The telework coordinator shall retain a copy of each telework agreement to ascertain compliance (initial and annual agreements). The updated Telework Agreement (STD. 200) can be found on the [Statewide Forms Directory](#).
- **Establish department processes for approving, modifying, denying, and terminating the telework agreement**  
Processes for approving, modifying, denying, and terminating a telework agreement must be developed by your department. An annual review process of the telework agreement must be developed as well. Visit the [Telework Agreement guidance](#) on the Statewide Telework website for information.

- **Build a knowledge base platform and develop content**  
Use a knowledge base platform, such as SharePoint, to keep your department informed of telework processes, department direction, training, FAQs, etc. The content should be easily accessible to all department employees.
- **Include teleworking in the Recruitment, Employee Onboarding and Exit processes**  
Add telework information to job advertisements, job descriptions, onboarding checklists, welcome packets, exit processes, exit surveys, and other materials.
- **Confirm that current department ergonomic processes are available to teleworkers**  
Processes may need to be adjusted to include the ability to have ergonomic assessments of approved alternate work sites. A virtual method to attest for the assessment should also be implemented.
- **Ensure management understands the provision of equipment for a single dedicated workstation for teleworking employees**  
Employees designated as remote-centered workers shall have a dedicated workstation at their approved designated alternate work location. Employees designated as office-centered workers shall have a dedicated workstation in the office. Remote centered teleworkers will not normally have an assigned work station at both the alternate work location and the office. See [Policy Directives, #7](#), for more guidance.
- **Confirm necessary tools and equipment are provided to help teleworkers succeed**  
Ensure that teleworking staff have appropriate tools to successfully perform their essential job functions, meet expectations, and be productive. The Statewide Telework website has information on collaboration tools in the [Support Remote Work](#) section.
- **Work with department leadership to implement asset management methods**  
A standard asset management process should be established to allow teleworkers to "check out" and "return" state-issued equipment such as laptops, monitors, furniture, and other state property for telework use. The process should require the return of any equipment no longer needed by the teleworker. Follow your department process for accountability of assets.
- **Ensure that established performance management methods are inclusive of all staff**  
Staff should be assured that all employees will be treated equally regarding performance management, conduct, training, and promotional opportunities. Employee expectations should be no different between office-centered and remote-centered employees. [Find training](#) for a hybrid workforce on the Statewide Telework website.
- **Contact your Information Technology (IT) department for assistance in establishing technology policies and guidelines consistent with the management memo**  
Recommendations are available on the [Statewide Telework website](#). As part of this policy, employees must agree to abide provisions of the Telework and Remote Access Security Standards before being authorized to connect to state IT infrastructure for telework or any remote access purposes. All employees must receive security training to ensure confidentiality and security of equipment and information used in the course of the employee's duties. Refer to [Support Remote Work](#) for more information.
- **Measure and report the results of adopting the telework program**  
Departments shall use data to measure the results of their telework program and report to DGS annually. Your IT department may become an integral part of data collection and reporting. Refer to [Track Telework](#) in the Statewide Telework Website for more information.