State Medicaid & CHIP Telework Playbook

A Guide to Accelerate States' Ability to Telework

Why This Playbook?

The Centers for Medicare & Medicaid Services (CMS) Center for Medicaid and CHIP Services (CMCS) prepared this playbook to help states that are interested in accelerating the adoption and improvement of telework practices in Medicaid and the Children's Health Insurance Program (CHIP) nationwide. As illustrated here with state and industry examples, telework enables Medicaid and CHIP workers to maintain the capacity to continue to provide essential services during emergencies, office closures, or other unforeseen events that limit in-person work.

The approaches and information in this playbook are intended as ideas, and should not be taken as Federal approval of any project. To solicit Federal approval, states are required to follow the usual processes for

obtaining enhanced federal funding for information technology and meeting all security and other regulatory requirements.

As of this writing, the prolonged closure of state offices in response to the 2020 COVID-19 pandemic has been the catalyst for a rapid and major expansion of telework and the emergency acquisition and

deployment of tools to support the model. CMS recognizes that this public health emergency impacted states' normal operations, particularly in light of staff shortages and the recommendations that individuals socially distance themselves from others. Shelter-at-home orders have resulted in states' transitioning their Medicaid and CHIP in - office business processes, including eligibility determinations, into a telework environment, to varying degrees.

This playbook was initiated as a result of questions from states during the 2020 COVID-19 pandemic. During this time states devised response plans that included providing services to their benficiaries while employees and support staff worked remotely.

To support states in developing such a plan and in their telework post event assessments and improvement initiatives in their Medicaid and CHIP programs, this playbook offers cultural, policy, and technology considerations for telework programs in the following:

- ☐ **Play 1:** Lead through telework organizational change
- ☐ **Play 2:** Establish teleworking policies and agreements
- ☐ **Play 3:** Optimize technology for telework
- ☐ **Play 4:** Measure productivity rather than presence
- ☐ **Play 5:** Fortify teleworker supports
- ☐ **Play 6:** Use telework to enhance agency resiliency in emergencies

NOTE: This compendium is not intended as guidance from CMS. It does not replace or serve as a substitute for CMS requirements and policy. The actions outlined in this document have not been evaluated for effectiveness by CMS or any government agency. This compendium is solely an informational product offered by CMS to state Medicaid and CHIP agencies as well as state and local officials.

As state Medicaid and CHIP agencies adjust to a post pandemic world, telework decisions will continue to be at the forefront. Having, in many cases, made significant infrastructure investments to support an emergency transition to telework, states will be tasked with deciding how they could move from an emergency operations telework model to one that is well-designed, modern, and sustainable. At the same time, states face new budget realities and will be thinking about strategies for administrative savings. Indeed, telework is not just for emergencies. These decisions are complex, and to that end, there are several topics included for consideration to make this document applicable for states in various stages of telework maturity. This enhanced scope makes this resource more robust than a traditional, shorter playbook but is designed to improve the relevance of this document in years to come.
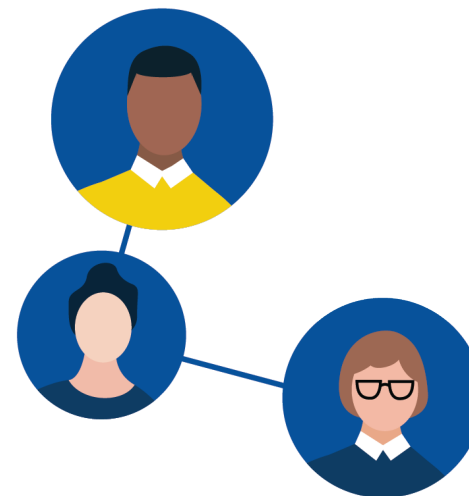
Using the Telework Playbook

The playbook is divided into distinct sections—*plays*—to enable state Medicaid leadership to prioritize the most relevant focus areas and target them to the appropriate state audience. For example, states may want to share Play 3, Optimize technology for telework, with Medicaid Chief Information Officers, Chief Technology Officers, or other information technology staff. Each of these plays contains the following:

- **Key questions** at the beginning of each play for prompting crucial conversations, honing your vision, and planning your strategy
- **Playbook in action** and **Resource replay** sections for highlighting sample approaches for telework in states, cities, or businesses and for providing the citations and links for further consideration
- **Checklists** for outlining key milestones for executing a play, such as assembling individuals and resources
- **Notes** and planning prompts for your own state-specific items

Acknowledgments

Play 1: Lead through telework organizational change

Use this play for thinking through —

- What telework benefits are currently unrealized in your state's telework program? What operational flexibilities, workforce retention, or cost-saving benefits are most needed, based on your workforce and budget?
- How will you continue to enforce telework organizational change? What tools—cost-benefit analyses, vision statements—can be developed to help you?
- What stakeholders and senior leaders do you need to engage throughout your efforts and at what key junctures?
- Who can be your telework champions in promoting organizational change, and how will they engage with the teams?
- What risks do you perceive in telework operations, and which are your highest priority? What mitigation strategies will you employ?

State and federal government agencies, in addition to the private sector, have implemented and refined telework initiatives over the past several decades and have already worked through many of the concerns. Other agencies' experiences, combined with your own involvement with emergencies like the COVID-19 pandemic, provide valuable insights and lessons learned to guide you through planning your telework or remote program for 2020 and beyond so that telework (1) best aligns with your agency's mission and goals and (2) minimizes any unintended consequences.

Playbook in action: Examples of state-defined telework benefits

The benefits of telework can support and should be aligned with the agency mission, strategic goals, and objectives for employees, the agency, and the larger community.
→ The **Maryland** Teleworking Information Center landing page describes telework benefits. It also notes that the state is encouraging telework by streamlining the process for employees and managers. → **Nebraska's** Telecommuting Guidelines document lists advantages and disadvantages of telecommuting for both agencies and employees.

Below: The potential benefits of telework are far reaching

Benefits	Employees	Agency	Community
Operational flexibilities—The COVID-19 pandemic magnified the value of being able to continue *business as almost usual* for a prolonged office closure.	▪ Increase ability to meet social distancing needs of employees and/or vulnerable people employees might live with	▪ Increase efficiency of single state agency administration ▪ Reduce potential workplace disruptions due to weather, disaster, and public health emergencies ▪ Improve compliance with COVID-19 recommendations for encouraging telework and social distancing ▪ Compliance with Americans with Disabilities Act reasonable accommodation	▪ Continue customer service during office closures ▪ Improved customer safety; social distancing to protect vulnerable populations ▪ Improved government efficiency
Workforce retention—Telework can influence an employee's decision to stay in a job and also create new employment opportunities in the community. This boosts an organization's recruiting and retention efforts and improves workforce morale.	▪ Enhance work-life balance ▪ Increase employee empowerment and job satisfaction ▪ Reduce commuting (associated time and stress)	▪ Improve productivity and employee satisfaction ▪ Better recruiting and retention, especially in state capitals where there are other opportunities in state government ▪ Increase retention of employees who do not live within a reasonable distance to commute daily	▪ Potential employment opportunities for people with disabilities, people who live in rural areas, older workers, and spouses of those in the military
Cost savings or economic implications—The potential for financial savings on office space can begin to accrue almost immediately. The administrative savings aspect can be a major selling point to legislators and other stakeholders. After the COVID-19 pandemic, states have the ability to continue administration of their Medicaid program almost uninterrupted, even in circumstances when the physical office is inaccessible or not advisable.	▪ Decrease work-related costs (commuting, work clothes, lunch)	▪ Achievement of administrative savings (real estate costs, energy, training, parking needs, recruitment) ▪ Reduction in unscheduled absences ▪ Reduction of future costs by avoiding new leases or space build-outs	▪ Decrease traffic congestion ▪ Creation of rural jobs

Navigate culture change

A key step in establishing the need for organizational change is being able to answer the *why* questions—that is, *"Why telework?"* and *"Why telework now?"* Answers might include:

- To increase organizational resiliency in states of emergency
- To achieve potential administrative savings, especially when facing potential budget shortfalls
- To meet the need for social distancing to protect vulnerable populations—both employees and clients

> **Playbook in action: Example approaches to cost-benefit analyses**
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> Guides and tools are available to inform and assist in conducting a cost-benefit analysis of telework and provide a framework to help with projecting savings, setting participation goals, and quantifying the benefits of telework in conjunction with evaluating your telework program. → The **Washington State Legislature** developed a Cost/Benefit Analysis Guide that includes worksheets to estimate the line-item costs and benefits of a telework program. → **Virginia's** Telework Cost and Savings brochure outlines the high-level concepts of telework program costs and benefits.

Importance of culture change for telework success. The case for telework and feasibility of its implementation is significantly different in 2020 than it was even 10 years ago. Fundamentally, culture change is more than making a business case and reducing resistance. Having a large population of the team operating remotely, or even a smaller group transitioning rapidly to telework, drives culture change. It is important to include everyone in discussions about how to collaborate remotely. The technology that you use for telework programs can also be leveraged to promote greater sharing and collaboration to promote coworker interaction and interpersonal relationships.

For states with mature telework programs, culture change may be less of an issue. For those still working on major changes in the culture, you can plan

> **Playbook in action: Telework and workforce retention**
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> Telework can be used as a recruitment incentive. → The **Arizona Health Care Cost Containment System's** job recruitment language emphasizes *"careers that fit your lifestyle."* Some positions provide an opportunity to work entirely from home or telecommute several days a week.
>
> Telework policies also provide employment opportunities. → **North Dakota's** telework policy includes provisions for how teleworking may be considered as a reasonable accommodation under the Americans with Disabilities Act. A brochure explaining the state's policy defines reasonable accommodation as *"any change in the work environment or in the way things are customarily done that enables an individual with a disability to apply for a job, perform a job, or gain equal access to the benefits and privileges of a job as long as the accommodation does not cause undue hardship to the agency."*

accordingly to proactively address and debunk telework myths, mitigate potential threats to productivity, and ease remaining resistance. Consider organizational change principles to help minimize disruption and gain acceptance for what could be a very different work model. For example, strategize on methods for:

- Empowering change agents to champion telework within the agency and successes
- Incorporating telework goals and the reason(s) for change in training

- Creating accountability for ongoing smooth operation and integrity of the telework program
- Measuring and communicating progress in achieving telework objectives and goals

Manage and mitigate risk

Although the benefits of telework are well documented, there may still be a reluctance to adopt or expand these programs. Some people may have had a negative experience with telework in the past. Skepticism can and should be expected. Identify the major changes in work processes and organizational dynamics and plan to address them.

Below: Anticipate telework risks and develop targeted mitigations that strengthen telework program perceptions

Risk Area	Potential Mitigations	See Also in Playbook
Telecommuting expectations	• Communicate that some jobs are not suitable for telework and will never be. Assess each job and determine what, if any, duties can be done outside of the office. Differentiate between full-time and less than full-time telework. • Implement requirements for core hours, provision of current phone number, time frames for responding to instant messages and emails, shared calendars, and participation in meetings. • For managers, include their input in policies and procedures, provide manager-specific training and ongoing resources and supports, and solicit feedback. • Assign meaningful work in sufficient quantity. Plan for evaluation of work products for quality, timeliness, and availability for concerns about underperformance or employees doing less work than if they were in the office. • Address potential impacts in employee training, create a self-assessment of telework suitability, allow for a trial period, and provide the option to terminate the agreement.	• Play 2: Establish teleworking policies and agreements
Security	• Leverage enhanced Federal Financial Participation for technology to enhance security (both implementation and ongoing costs).	• Play 3: Optimize technology for telework
Technology and technology support	• Implement self-service technical support tools. • Leverage enhanced Federal Financial Participation for needed technology (both implementation and ongoing costs).	• Play 3: Optimize technology for telework
Team cohesion	• Promote teleconferencing, collaboration platforms, and regular on-site meetings to replace in-person meetings and ad hoc office visits. • Provide telework training for nonteleworkers on vision and goals, monitoring and equitable distribution of all workloads, and communication tools for keeping teams connected to address potential resentment by other employees. Periodically reassess whether some job duties can be done remotely.	• Play 4: Measure productivity rather than presence • Play 5: Fortify teleworker supports

Risk Area	Potential Mitigations	See Also in Playbook
Career advancement	▪ Provide career development opportunities. Enhance regular communication between teleworkers, on-site peers, and managers. Encourage engagement in office activities and recreational opportunities. ▪ Promote awareness of the risk of decreased knowledge transfer and incorporate triggers to succession planning to ensure that knowledge transfer happens. Develop plans for cross-training.	▪ Play 4: Measure productivity rather than presence ▪ Play 5: Fortify teleworker supports
Work-life balance	▪ Ensure strong ongoing communications, include a trial period. ▪ Provide the option to terminate the agreement to address adverse impacts on employees from isolation.	▪ Play 5: Fortify teleworker supports
All	All of the above risk areas and potential mitigations, but in emergencies	▪ Play 6: Use telework to enhance agency resiliency in emergencies

Set the stage for successful telework

Help from staff and telework champions. Good telework programs need dedicated resources for planning, implementation, and ongoing operations. The number of staff needed depends on the size of the agency and the degree to which external resources are used. At a minimum, you may want to appoint a telework champion with the authority to make key decisions, represent the interests of teleworkers in organizational planning, and serve as a single point of communication.

Support from senior leadership and stakeholders. As is the case for any organizational change initiative, gaining support from leadership is essential—resistance of senior leaders has historically been cited as a primary obstacle to telework. Any telework brings a change in the agency culture and a commitment to doing things a different way. These are some concrete examples of how leadership can show support for telework:

- Committing planning resources
- Vocalizing support to decision makers, for example, public declarations during briefings
- Incorporating telework principles or best practices into their own work
- Committing to *big bets,* that is, initiatives that are strategic, short term, and bold
- Communicating support to employees through message boards or other virtual forums

> **Playbook in action: Risks and mitigation strategies and more**
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> Awareness of the challenges—as well as the benefits—of employees working remotely enables you to establish realistic expectations and take proactive measures to mitigate the risks associated with telework.
> → An **IBM** Center for the Business of Government report addresses in depth the recognized benefits of telework, the risks associated with telework along with mitigation strategies, and the challenge of management resistance.

> **Playbook in action: Small changes can lead to big payoffs**
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> The **CMCS DSG leadership team** were early adopters of video conference calls when the technology was made available for CMS. They expanded in early 2019 to include colleagues in national offices, making video calls the DSG standard. This perspective helped them lead the change for all of CMCS during the COVID-19 pandemic.

## Plan for telework program reporting and evaluation

Although managers evaluate the performance of individual teleworkers, agency leadership considers the overall performance of the telework program. Regular assessment of a telework program can help an agency determine whether goals, objectives, and productivity expectations are being met and justify additional investments in telework. By anticipating that you may be asked to demonstrate and quantify progress toward your stated goals for telework, you can develop metrics and identify data that can be used in analysis. The U.S. Office of Personnel Management (OPM) makes a salient point about evaluation of work-life programs, including telework programs, by federal agencies that applies to state governments as well: *"Evaluation of these programs has historically been unsystematic and based primarily on anecdotal evidence and/or the desire to 'do the right thing,' which impacts the agency's ability to make effective, data-informed decisions."* Inconsistency of data—along with a lack of planning and documentation—can make it difficult for employers to accurately report a metric as seemingly basic as the total number of employees engaged in telework. OPM developed an Evaluation Guide that agencies may want to reference for evidence-based evaluation strategies in order to:

- Define the benefits of continued telework
- Determine program effectiveness
- Understand and measure goal achievement
- Make any needed improvements or changes

Telework.gov, the website for government telework, breaks down the components for a systematic evaluation of telework program goals, as shown in the chart below.

Below: Use goals as part of the process of building and developing an ongoing telework program and to establish the continuing business case for telework

Evaluation Component	Options	
Potential evaluation methods	▪ Comparison of before and after ▪ Comparison of with and without	▪ Time-series assessment
Metrics for telework program	▪ Size ▪ Capacity ▪ Quality	▪ Quantity ▪ Duration ▪ Frequency
Measurement outcomes	▪ Employee attitudes ▪ Absences ▪ Performance	▪ Retention ▪ Costs

Sources for evaluation data	▪ Custom surveys
	  o Employee satisfaction
	  o Manager
	  o New hire and exit
		▪ Time and attendance systems
		▪ Utility/building/office space data

Time frame for achievement	▪ Short term	▪ Long term
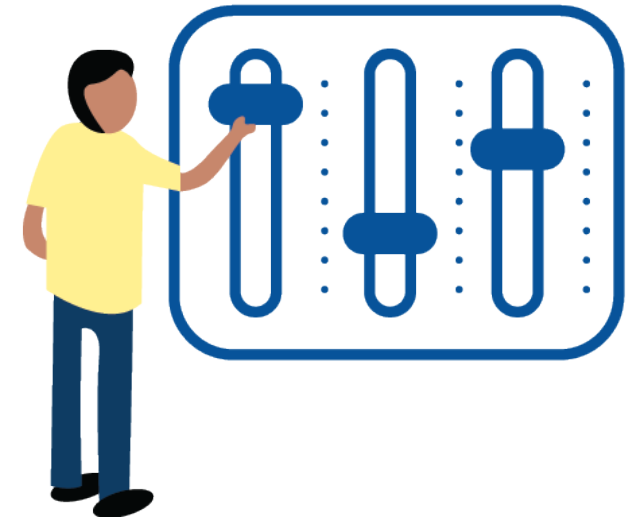
Measure key telework goals

Telework goals—either at the state level or by the agency—will inform selection of metrics and focus primarily on measurement and reporting. Some state laws require reporting on specific telework metrics such as number of participants, annual real estate savings, or transportation impacts.

Participation rate. The most basic telework metric is the number of employees who telework. Some agencies have struggled to accurately and consistently report this number. Determining the number of employees who telework during a given period requires multiple decisions:

- What data source can be used to quickly provide that figure?
- Who will be defined as a teleworker, and what are the criteria for any categories that may be defined in policy, such as full time versus occasional?
- Will a copy of all telework agreements be maintained in a centralized location, such as with human resources? If yes, what is the process for ensuring that employees who no longer telework or who are no longer with the agency are excluded from the count?
- If automated time and attendance systems are used to identify teleworkers, how is the accuracy of coding validated?

Real estate and energy savings. From a budget perspective, telework has been demonstrated to reduce the costs for real estate and utilities and is increasingly a goal of governors. In the short term, although real estate costs may have not caught up to reduced need, has a reduction in the square footage needed been realized? Can a case be made that in the absence of telework, it would have been necessary to acquire additional space?

> **Playbook in action: Expectations for employee participation in evaluations**
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> → **Nebraska's** Telecommuting Guidelines document anticipates employee participation in program evaluation: *"Employee agrees to participate in all studies, inquiries, reports or analyses relating to telecommuting for Employer, including inquiries which employee might consider personal or privileged. Employer agrees that Employee's individual responses shall remain anonymous on request by Employee, but that such data may be compiled and made available without identification of Employee."*

Commuting miles. Since the 1990s, transportation policymakers have emphasized the benefits of fewer commuting miles and less commuting time for not only the employer and employee but also the community. Many state telework programs started with this as the primary objective. The City and County of San Francisco's Telecommuting Policy requires online survey responses for the approval of telework. The survey's instructions state that the survey is intended to *"collect data to help refine the telecommute program and understand its benefits for the City, its employees and the environment."*

Oak Ridge National Laboratory's guidebook Enabling a Mobile Workforce details the steps and provides information on conducting an employee commuting survey: (1) survey selection, (2) survey development with suggested topics, (3) survey deployment, (4) determining survey results, and (5) reporting the results of the survey.

Employee experience. Employee surveys can be used to learn teleworkers' self-assessment of goals, such as improved work-life balance, increased productivity, level of satisfaction with telework, and suggestions for improvement. To increase survey response rates, language can be incorporated into

telework policies and agreements mandating that employees who telework complete surveys and otherwise participate in program evaluation activities. The U.S. Railroad Retirement Board's Office of Inspector General Telework Survey: Appendix V findings includes examples of telework survey questions.

Consider focus groups for managers, teleworkers, and nonteleworkers. See sample materials for conducting telework employee focus groups—including a recruitment sample email and a focus group script/questions for nonteleworkers, teleworkers, and managers—in the Telework & Flex-Schedules Toolkit produced by the City and County of San Mateo, California.

Expect to make continuous improvements

Anticipate that your telework program will always be a work in progress and subject to change driven by updates to business processes (some jobs that are not candidates for inclusion in the telework program could become eligible in the future), new technology, new threats, and other external drivers. The likelihood of having an effective and sustainable telework program increases by (1) setting realistic expectations for both internal and external stakeholders, (2) assuming that adjustments to policies and procedures will be needed, and (3) being prepared to make these adjustments rapidly. Do not completely abandon the idea of teleworking because of one bad experience or allow *the perfect to be the enemy of the good.*

Playbook in action: Timely polices

Continuous improvement might mean updating your policies to reflect recent events. For example, in response to the COVID-19 pandemic, → **Idaho** updated its policy to require departments and agencies to incorporate telecommuting in their Continuity of Operations Plans.

Checklist

- [ ] Navigate culture change
- [ ] Manage and mitigate risk
- [ ] Set the stage for successful telework
- [ ] Plan for telework program reporting and evaluation
- [ ] Measure key telework goals
- [ ] Expect to make continuous improvements
- [ ] Other _____

Resource replay

- [ ] Arizona Health Care Cost Containment System. AHCCCS Careers web page. Date unknown. https://jobs.azahcccs.gov/
- [ ] California Department of General Services. Statewide Telework (Telecommuting) web page. Date unknown. https://telework.govops.ca.gov/
- [ ] City and County of San Francisco. *City and County of San Francisco Telecommuting Policy*. January 2017. https://sfdhr.org/sites/default/files/documents/Employees/Telecommute/Telecommute-Policy.pdf
- [ ] San Mateo County Office of Sustainability. *Telework & Flex Schedules Toolkit*. Date unknown. https://www.healthlinkscertified.org/uploads/files/2018_12_28_23_00_47_SMC_Telework_Toolkit.pdf
- [ ] Idaho Division of Human Resources. Statewide Policy: 2019 Novel Coronavirus (COVID-19). June 3, 2020. https://dhr.idaho.gov/wp-content/uploads/2020/COVID-19/StatewidePolicyCOVID196.3.2020.pdf
- [ ] Kitsap Regional Coordinating Council for a project funded by the Washington State Department of Transportation. Washington Telework Pilot Project. *Cost/Benefit Analysis Guide*. October 30, 2008. http://www.teleworktoolkit.com/library/CostBenefitAnalysisGuide.pdf
- [ ] Maryland Department of Budget and Management. Teleworking Information Center web page. Date unknown. https://dbm.maryland.gov/employees/Pages/telework/teleworkHome.aspx
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- [ ] Utah Governor's Office of Management and Budget. A New Workplace: Modernizing Where, How, and When Utah Works web page. 2018. https://gomb.utah.gov/a-new-workplace-modernizing-where-how-and-when-utah-works/
- [ ] Virginia Department of Rail and Public Transportation. *Telework!VA: Telework Costs and Savings.* Date unknown. http://www.teleworkva.org/downloads/CostsAndSavings.pdf

Play 2: Establish teleworking policies and agreements

Use this play for thinking through —

- What standard policies do you need to support your telework program? What details do you need to add to set clear expectations?
- What other policies do you need to support your telework program and employees?
- What policies may have special implications for state Medicaid agencies?
- How can you use telework agreements to enforce policies? What controls can you use to ensure that agreements are completed and renewed?

Strong written policies build accountability into a telework program. The U.S. Office of Personnel Management provides this guidance to agencies that aim to review or strengthen telework policies in its Guide to Telework in the Federal Government: "*A well-written telework policy is the foundation for a good telework program . . . . There are two main objectives to be met if you are to have an effective telework policy:*

- *The policy should be written in such a way that it can be clearly understood and easily used.*
- *The policy should incorporate content fundamental to the development and support of an effective telework program.*"

Playbook in action: Telework research
There are several meta-analyses and reports that examine telework in government agencies, including best practices and lessons learned. → A 2018 **RAND Corporation** issue brief, Understanding Government Telework: An Examination of Research Literature and Practices from Government Agencies, includes a comprehensive, 10-page list of references to telework-related reports, articles in journals, news stories, and web pages.

Consider customer service when developing telework policies

Although some policies and procedures may need to be tailored for telework programs, remember that many fundamentals remain unchanged. Government agencies are expected to deliver excellent service to both internal and external customers, and this expectation should not change during telework. Consider the following audiences below, each with different implications.

Medicaid/CHIP beneficiaries. Many states have introduced pathways that make it possible for Medicaid and CHIP beneficiaries, as well as other customers, to conduct business by phone, through self-service portals, and through electronic communication. Employees who telework part time could have designated office days or hours during which any needed in-person interactions can occur.

Other external stakeholders. Meetings with vendors, providers, and other stakeholders can be successfully conducted by phone or via web conferencing.

Coworkers. Although most of the focus is on how telework affects the employees who telework and their managers, coworkers who are not engaged in telework are affected as well. Telework requires a different way of working and communicating, and it should not result in more work or create undue hardship on employees who do not telework. Telework policies can address logistical issues to ensure customer service is not diminished. For example,

telework policies might require teleworkers to use the agency's chat program and keep their status updated. Guidance for scheduling meetings can address arrangements for remote participants and teleconferencing proactively (for example, webinar instead of just audio) so the responsibility is not only on the teleworker. Involve your appointed telework champion to help with coworker engagement and modeling successful telework.

Playbook in action: Recommendations addressing customer service

"If one person on the team is teleworking, that means the entire team is teleworking." → The **General Services Administration's** The Mobile Worker Toolkit: A Notional Guide lists "tenets of telework" for ensuring a seamless experience for the customer and includes many tips and practical suggestions for both employees who work remotely and those who do not for communicating and maintaining the same level of internal customer service regardless of where work is performed.

Draft and finalize telework policies

Multiple websites and web pages include comprehensive information on all components of telework and incorporate lessons learned and best practices. The Washington State Legislature funded the Telework Pilot Project and the Telework Toolkit, which includes a Guide to Writing a Telework Policy. This guide compiles policies from public and private organizations that address the following topics:

- ☐ **Purpose** — Why telework is offered; can be based on vision statement
- ☐ **Definition** — What telework means within the organization
- ☐ **Application and scope** — Application and any limitations or policies or agreements that supersede
- ☐ **Eligibility** — Criteria and requirements for employees to perform telework; can include requirements (for example, individual must perform regular work in person before starting telework) and other considerations (for example, individual has limited need for in-person communication with customers or coworkers)
- ☐ **Application and approval** — Informal or formal processes for employee
- ☐ **Telework agreement** — Individualized written agreements
- ☐ **Manager responsibilities** — Managerial recommendations and/or requirements
- ☐ **Training** — Provisions for whether training is recommended or required and timing of training

- ☐ **Duration** — Including specifications for trial periods and frequency for when agreements are updated
- ☐ **Reviews and evaluations** — Responsibilities of teleworkers and managers, including policies and methods for employee monitoring
- ☐ **Communication and accessibility** — Communication pathways (for example, employee-manager, employee-customer) and techniques for communication
- ☐ **Work hours** — Minimum requirements for hours and schedule
- ☐ **Travel expenses** — Reimbursement for project site, offices, and so forth
- ☐ **Emergency operations** — Instruction for employee action in emergency situations, including examples of different emergencies
- ☐ **Dependent care and other nonemployment responsibilities** — Situations with different levels of flexibility

- [ ] **Performance standards** — Minimum standards for professionalism and performance to uphold while teleworking
- [ ] **Workspace** — Teleworker responsibilities in telework locations, including equipment, safety, inspection, and costs
- [ ] **Equipment** — Conditions and expectations for organizational equipment such as hardware, supplies, and furniture
- [ ] **Software** — Continuation of above with special considerations for technology and software, including software specifications, licensure, and duplication of software

- [ ] **Information security** — Discussion of data protection from corruption, loss, or theft over systems, network, hardware, software, or paper files
- [ ] **Legal** — Specifications of individual rights and responsibilities, including limitations, for relevant organization-specific topics; can also include language on tax implications and zoning
- [ ] **Modification or termination** — Circumstances and clauses for telework arrangements
- [ ] **Job sharing** — Opportunities to divide job responsibilities across two teleworkers

In the sections below, we present additional considerations for selected telework policies. Ultimately, the scope of your research and policy drafting will depend on what already exists in your state and the telework changes you aim to make. You also will need to consider state and local laws or collective bargaining agreements to inform telework policies. Regardless, clear and concise formal policies are the key to establishing expectations and definitions related to telework for employees and for the agency.

Application and scope. Some states have formal telework formal policies that include completing and submitting an application form as part of the approval process to telework. Give careful consideration to what questions to include and how the information can help with internal controls and maintain the integrity of a telework program. Telework applications differ in scope but can:

- Serve as a training tool by, for instance, prompting employees to complete a self-assessment of their readiness for telework (for example, South Carolina's Model Policies and Guidelines web page contains a model application)
- Demonstrate due diligence in compliance with applicable policies and requirements (for example, Minnesota's comprehensive Telework Policy)
- Collect employee declarations and additional documentation for any childcare arrangements and outside employment to help with internal controls and compliance monitoring

> **Playbook in action: Telework applications and policy compliance**
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> States can also use telework applications and telework agreements to collect additional attestations or other specifications. → **Connecticut's** Department of Administrative Services Interim Telework Program web page provides an Interim Telework Application that collects employee declarations and additional documentation for any childcare arrangements and outside employment to help with internal controls and compliance monitoring.

Eligibility. When considering policy for telework eligibility, break the criteria into a two-step test: the job and the employee.

- The job: Focusing objectively on a job's suitability for telework reduces the perception of unfairness, which could otherwise be a thorny issue. The reality is that some jobs cannot now—and will never—be performed satisfactorily through full-time remote work. Other jobs could be performed remotely if business processes are modified (for example, conversion of paper documents to electronic), but such changes take resources and time. Document an assessment of the duties of each job to determine whether it can be satisfactorily performed outside the office and is therefore eligible for telework full time, part time, or on a temporary basis. If the answer is no, can changes in business processes reduce the number of days the job can only be performed in the office? As technology and business processes evolve, periodically review jobs that had been previously determined unsuitable for a telework environment to see whether that has changed.
- The employee: Conversely, although the job may be suitable for telework, the employee may not be a candidate. Some of the disqualifying factors from existing telework policies include (1) less than satisfactory performance evaluations, (2) lack of home access to broadband/high-speed internet when it is essential to the job (a problem that persists in parts of rural America) or other home environment concerns, and (3) length of time in the position (for example, minimum of three months to a year to learn the organization and job).

Communications and accessibility. Through (1) robust policies containing explicit expectations for employee responsiveness during work hours and (2) a variety of communication technologies that did not widely exist until recently, managers and colleagues can connect as quickly with employees who work remotely as with those who do not. Below are examples of requirements that can be incorporated into telework policies and written agreements:

- Contact information in the form of employee primary and backup phone numbers at which they can be reached during work hours, with calls returned within a specified time frame
- Shared calendar that is accurate and current
- Status indicators—Available, Busy, Be Right Back, and customized messages—in online collaboration tools
- Time frames for responding to emails, text messages, and chat
- Frequency for checking emails during work hours and guidelines for urgent messages
- Manager notification when the employee physically leaves the remote work location, such as for a lunch or a meeting
- Meetings either through audio or video conferencing, and—with the increasing use of video conferencing—any expectations for professionalism and dress code
- Reporting within an agreed-on set time frame to the primary work site as requested by the manager

> **Playbook in action: Tools for reviewing telework eligibility**
>
> Tools for both the employer and employee can help review telework eligibility. → **Washington's** Telework Suitability Tool includes steps, checklists, and an employee self-assessment that can be used in state government. → **Florida's** Identifying Positions Appropriate for Telework and Determining Employee Eligibility includes a series of 10 questions to ask in deciding whether a full- or part-time job is suitable for remote work, as well as seven factors to determine the eligibility of an employee who is working in a suitable job. → **South Carolina's** Model Policies and Guidelines web page has a subsection on telecommuting that includes a Telecommuting Sample Application. The sample provides a series of eight questions for employees to assess their suitability for working outside the office, such as comfort level with working alone (isolation), organizational and time management skills, and adaptability to change.
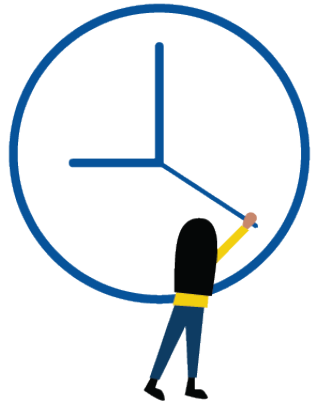
Work hours. The policy should be clear regarding periods during the workday that employees who telework are expected to be working. An employee's schedule and availability will depend on the duties of the job. One option is to have core hours during the day when the entire team is available, with the remaining work hours flexible. Some Medicaid systems (eligibility, Medicaid Management Information System) may be taken offline nightly for maintenance, and this unavailability needs to be factored into work schedules—or the time for system maintenance and downtime reconsidered.

Equipment. Agency telework policies on equipment for the home office including computers will reflect any existing state-level policies. Relevant topics to include in telework policies and agreements include responsibility (agency or employee) for providing equipment; what, if any, expenses incurred during telework are reimbursable; procedures and time frames for reporting equipment needing repairs; and the explicit requirement to return the equipment if the telework arrangement ends or the employee leaves the agency. The policy should also address procedures for the removal of agency-owned equipment, including any paperwork that must be completed and time frames for doing so. The responsibility for work-related telephone charges should be clearly addressed if an agency phone is not provided. Policies should take a position on your state's approach on whether to provide an agency-issued telephone or a monthly stipend. Depending on the option, further clarification might be needed for whether personal calls are allowed.

Security. Telework policies, agreements, and training can reinforce the responsibility to safeguard sensitive information from disclosure by requiring that employees secure the work area and devices. In updating formal telework policies, consider adding specifics that go beyond a generic statement that the employee must adhere to the agency's security and privacy policies—for example:

- Do not forward documents containing protected health information to a personal email account to circumvent slow network connectivity or enable printing.
- Do not transfer any work files to your personal computer; note that this means not using thumb drives, other portable electronic devices, or cloud storage services.
- Do not share an agency-issued computer or device with family or friends.

State government agencies generally have access to information technology (IT) staff with expertise in cybersecurity and have written policies and requirements for security training. When updating telework security and privacy policies, consult with subject matter experts, such as the broader statewide IT agency and state cybersecurity experts, the state Medicaid agency's or umbrella agency's IT department, current vendors, or other experts, to ensure that teleworking employees properly manage data and protect the privacy of Medicaid beneficiaries.

Other IT considerations. Policy can clearly define the technical support responsibilities in the home office so that employees understand what tasks they are responsible for performing (such as internet connectivity, home router configuration) and what support the agency will provide.
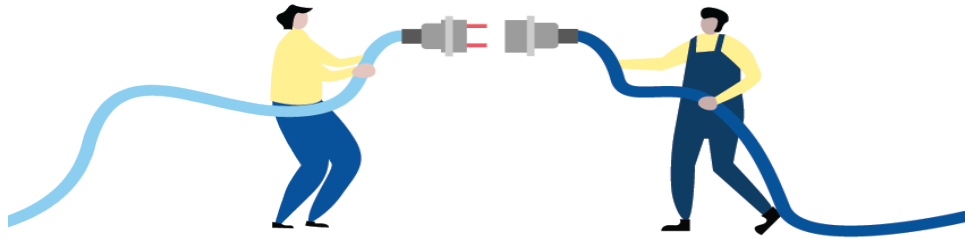
Connectivity to the primary work site. Employees who telework rely on dependable technology to connect to systems, data, and people at the primary work location. Certain jobs rely so heavily on systems access that telework policies could include protocols for reporting to the primary office if connectivity problems exceed a specified duration.

Legal. Your agency's legal and human resources departments can ensure that your telework policies and procedures fully comply with federal and state laws that can affect telework and address potential issues that could arise when employees are working in a location other than the office. Relevant federal laws include the overtime provisions of the Fair Labor Standards Act (FLSA), Medicaid confidentiality regulations (42 Code of Federal Regulations §431.300), Health Insurance Portability and Accountability Act (HIPAA) privacy and security requirements, and Americans with Disabilities Act reasonable accommodation provisions. Specific state and local laws may cover public records retention, digital signatures, workers' compensation (work-related injuries), double-taxation, and any state or agency-issued telework regulations and guidance that may exist. Collective bargaining agreements, if applicable, may also affect your telework policies.

Policy updates. Expect that written policies will need to be periodically reviewed and updated to address frequent questions, add examples, and incorporate changes in business practices and technology. Responsibility for maintenance and revisions can be specified in the policy. Availability of the policy online (intranet or internet) can ensure that all employees have ready access to the latest version.

Decide on other policies that may be unique to your state or agency

Depending on your telework program or the plans you are developing, you may need to create additional policies or update versions for teleworkers.

Policies for new employees. Many states require a minimum number of hours worked in the office and a trial or periodic telework occurrences before executing longer-term telework arrangements. This requirement allows time for new employees to learn their job and the agency, as well as to cultivate trust with the manager. The new employee period is an opportunity to establish a baseline that can be used to evaluate whether productivity has increased, decreased, or remained the same if and when the employee is subsequently approved to work remotely.

Playbook in action: Security and privacy attestations

It is important that employees who telework know the agency's expectations of them and the role they play in protecting data and resources. → **Connecticut's** conditions for approval of a telework arrangement include completion of a mandatory Interim Telework Security Addendum used by the employee to attest to procedures for:

- Implementing safeguards to prohibit access to restricted and controlled data
- Preventing inadvertent viewing of computer screens
- Securing laptop or computer when not in use

Playbook in action: Incorporation of references to other relevant policies *in toto* in telework policy

Several important policies for telework can be incorporated into your telework policy by reference, such as Medicaid confidentiality requirements, Internal Revenue Service tax information, HIPAA privacy and security requirements, and public records retention laws.
→ **Oregon's** policy specifies that telework agreements include acknowledgment in writing of receipt of statewide policies, including Acceptable Use of State Information Asset, Mobile Devices and Internal Controls, IT Asset, and Inventory & Management.

Playbook in action: Telework agreement renewal triggers

→ **Minnesota's** policy states that a telework agreement expires no later than one year after its effective date and that the manager and teleworker must discuss at least annually whether to renew it. The policy specifies that if the following events occur, it suspends the telework agreement and the manager and teleworker must discuss whether to continue:

- Changes in the teleworker's job duties
- Position change for teleworker or manager
- Expiration of trial period
- Change to telework agreement

Other items with specific implications for Medicaid and state agencies. Some states have revised or expanded policies to address Medicaid employee telework issues. Consider implementing the following to avoid future misunderstandings:

- Prohibitions against home printing by employees with access to personally identifiable information to address privacy and security concerns, including requirements for safeguarding Internal Revenue Service tax data
- Expectation that employees who telework remain on official duty in the event of an office closure due to weather, loss of power, early dismissal, or other circumstance
- For FLSA nonexempt employees, precise language regarding taking lunch, taking breaks, and having advance approval for any overtime hours worked
- Time frames and process for reporting connectivity problems and protocols that must be followed if an employee cannot work because of technology issues
- Travel reimbursement considerations
- Roles and responsibilities of IT support and other agency-provided technical assistance
- Technical considerations, including who provides and pays for internet connections

Other topics to consider. Some topics are seen less frequently in telework policy but could merit consideration and inclusion, including:

- Exceptions to the policy as written (extenuating circumstances, who must approve any exceptions, policies that apply only during an emergency such as bring your own device, in other words, BYOD)
- Responsibility for maintaining the policy
- Late start, early dismissal, and office closures
- Limitations on meeting with customers outside the primary office
- Outside employment and comingling state and nonstate work during work hours
- Additional details about agency visits to the alternative workplace, purposes for such visits, whether advance notice is required, and whether leaving a voicemail message is sufficient notice
- Requirement to participate in surveys, evaluations, and studies of the telework program
- Reiterating requirement to report any suspected data breach (even though included in HIPAA policy)
- Whether participation is voluntary or mandatory

Develop and finalize written telework agreements

Based on the policies you define, you can develop or revise work agreements that document the commitments that the employee and the agency have made. A well-designed telework agreement clearly spells out conditions and the responsibilities of both the employee and the employer and also includes essential employee-specific details. Policy should address which employees are required to have a telework agreement on file (for example, temporary teleworkers in the event of an emergency such as a pandemic). One option is to develop a separate written agreement for temporary telework.

Different examples of telework agreements are readily accessible, and they vary greatly in format, length, and content. The content may reflect requirements for such agreements stipulated in state laws as well as any requirements to include content established by the broader agency's department or umbrella agency. Depending on the state, there may be a uniform telework agreement prescribed for use by all state agencies or a model/template that agencies or managers can customize. At a minimum, a telework agreement generally includes:

- Physical location of telework office
- Teleworker contact information
- Tasks that will be performed while teleworking
- Telework schedule
- Expectations for availability and communication

- Security and privacy requirements
- Equipment specifications and checklists
- Effective date of approval to telework
- Performance measures

In addition to these items, you can include:

- Lists of equipment belonging to the agency with identifying information such as serial numbers or property tag numbers. Consult existing policies for inventory (for example, does policy require physical scanning of a bar code affixed to the device?) and whether the teleworking employee will be required to bring the tagged equipment to the office for scanning or whether the inventory policy can be revised to demonstrate that the equipment is in the employee's possession by some other means.
- Other addendums, for example, might include acknowledgment of receipt and understanding of the agency's telework policies or self-attestations to address topics such as workplace safety and cybersecurity.

The agreement specifies the period covered but can be revised in the interim to incorporate changes in business processes and technology and to ensure that it remains consistent with and supports the agency's business needs.

Consider the levels of approval on telework agreements and whether they are unintentionally creating barriers. Agencies may wish to consider the business need for multiple levels of agency signatures (approval of the agreement) beyond those of the immediate manager and the appointing authority, if different. Policies can specifically address any exceptions to obtaining these signatures, such as during an emergency. Establishing procedures for electronic signatures can help streamline the process of obtaining needed approvals.

Checklist

- [ ] Consider customer service when developing telework policies
- [ ] Draft and finalize telework policies
- [ ] Decide on other policies that may be unique to your state or agency
- [ ] Develop and finalize written telework agreements
- [ ] Other _____

Resource replay

- [ ] Connecticut Department of Administrative Services. Interim Telework Program web page. See document titled *Interim Telework Agreement.* Date unknown. https://portal.ct.gov/DAS/Statewide-HR/Telework-Program/Documents
- [ ] Florida Division of Human Resource Management. *Policy Guideline: Identifying Positions Appropriate for Telework and Determining Employee Eligibility.* Revised March 26, 2018. https://www.dms.myflorida.com/content/download/102807/586029/ Identifying_Positions_Appropriate_for_Telework_and_DeterminingEmployee_Eligibility_%5bRev._3-26-18%5d.pdf
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- [ ] Mississippi State Department of Health. *State of Emergency or Pandemic Event Telework Policy Manual.* March 17, 2020. https://msdh.ms.gov/msdhsite/_static/resources/8506.pdf
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- [ ] United States Office of Personnel Management. *Guide to Telework in the Federal Government.* April 2011. https://www.telework.gov/guidance-legislation/telework-guidance/telework-guide/guide-to-telework-in-the-federal-government.pdf
- [ ] Washington Office of Financial Management. *Telework Suitability Tool.* April 2018. https://ofm.wa.gov/sites/default/files/public/facilities/MWE/telework_determination.pdf

NOTES

Play 3: Optimize technology for telework

Use this play for thinking through −

- What equipment does your agency need to provide to meet telecommuting needs during surges or overall increases in the number of teleworkers?
- What software changes can your agency make to better support telework? Can collaboration software allow work to continue virtually with minimal disruption?
- What internet usage and connectivity practices can be used to ensure connectivity when it is needed most?
- How can you address security risks implicit in telework?
- What IT support approaches can most efficiently assist teleworkers?

Most teleworkers are highly dependent on a computer, a phone, and internet access to work effectively. Equipment and technology needs can differ for each employee depending on their job duties and communication needs, and there is not a one-size-fits-all approach.

Address gaps between existing and needed tools/technology

Depending on your agency's telework goals, you can determine existing equipment and technology available to support ongoing telework, as well as temporary telework surge needs in the event of an emergency. You can conduct a capacity inventory and needs assessment to identify resources available and any gaps that can be addressed to enable more employees to telework securely from remote locations.

Essential equipment for telecommuting. Consider the extent to which continuing to maintain dual office setups for teleworkers will affect overall telework equipment costs, as well as office space and real estate needs. Employees who telework less than full time will continue to need a workstation in the office, although this could be placed in a shared space. Options for computers during temporary telework include a pool of agency-owned laptops that can be checked in and out, an agency-issued dedicated laptop with or without a docking station and other peripherals, or removal of office computing equipment to the home workspace if advance notice allows.

Playbook in action: Telework and telecommunications

Telephones are essential to successful telework and among the most frequently used tools for real-time communication.

→ **Utah's** Deployment Guide for telework provides several options for meeting the telecommunications needs of employees working remotely:

- Provide the employee with a state-issued cell phone.
- Reimburse the employee for use of a personal cell phone.
- Install a soft phone client on the employee's laptop computer. The soft phone client does not incur any additional cost to what the agency is paying for phone services, and the current state-government provided phone number remains the same.
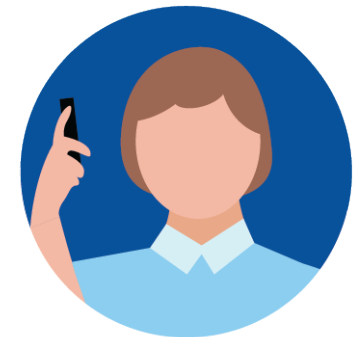
Software to support telework. Although the hardware needed to support telework is fairly straightforward, the proliferation of collaboration platforms and software applications to support telework can be overwhelming, with multiple options having essentially the same functionality.

Many agencies already have all the necessary tools needed by remote staff for connectivity, communication, and collaboration or need only to scale up their software licensing. Others may be interested in learning more about the features and functionality afforded by newer tools. Your existing technology vendors may be a resource—along with your IT team—to help identify gaps or upgrades. In particular, collaboration software enables people working on a common task—regardless of where they are physically located—to communicate, coordinate, and perform as a team through shared calendars, instant messaging, and document sharing.

Below: Collaboration software allows many kinds of work to continue virtually

Category	What it Does	Examples*
Document sharing	Allows multiple people to access and work on a document at the same time	Google Docs, Dropbox, Microsoft® Teams
Video conferencing	Facilitates virtual meetings that allow participants in multiple places to see each other	Zoom, Cisco® Webex™ Meetings, Google Meet, Microsoft Teams
Instant messaging/chat applications	Enables real-time communication	Microsoft Teams, Slack, Google Chat

* Not all inclusive or meant to be an endorsement or recommendation of the products listed.

Procurement of new technology to fit your needs. For agencies interested in purchasing additional equipment and technology to enable employees to remotely perform essential functions, an enhanced Federal Financial Participation (FFP) of 75 percent or 90 percent could be available from CMS for some of those purchases. Contact your CMS state officer for more information.

In the event of an emergency event (such as a weather event, building problems, pandemics, etc.), states can contact their Medicaid Enterprise Systems Officer with requests for emergency information technology (IT) funding and provide:

- Assurances that the funding is tied to an emergency and a description of the emergency
- Reasonable time frame for sending the Advance Planning Document
- Rationale for the spending, linking cost estimates to specific elements of the request
- Any questions or technical assistance needed for 45 Code of Federal Regulations §95.610, Submission of Advance Planning Documents, or CMS requirements that states must meet for Medicaid technology investments enhanced FFP as outlined in the Seven Conditions and Standards

> **Playbook in action: New ways to communicate**
>
> Full-time teleworking introduces new challenges to effective cross-team communication. Even the simplest topic or brainstorm can make an email thread unmanageable. During the COVID-19 pandemic, the **CMCS leadership team** began using a tool to enable persistent chat. Although there was some initial hesitation due to worries that there would be too many communication tools to watch, the team has now adopted the chat effectively for quick check-ins, communicating with each other during large telephone and video conferences, and having a little bit of fun. Persistent chats are also a convenient way for team members to catch up on discussions after they have been away from the office.

Internet availability. Not all employees have access to a strong internet connection or cell service. Millions of Americans do not have access to a connection of at least 25 Mbps/3 Mbps (the Federal Communications Commission's current benchmark for high-speed broadband). The extent to which high-speed internet is essential to satisfactorily perform the functions of the job should be a factor in determining eligibility of both the job and the employee for telework. Successful telework—including participation in video meetings—can be satisfactorily achieved with considerably slower Mbps than high-speed broadband, but employees need to consider whether they will be able to successfully complete their job duties. Simple emails require far less bandwidth than uploading a multipage document with graphics.

Practices that can slow connectivity during telework surges. During 2020, many government employees teleworked for the first time, with limited time for agencies to prepare. Although employee system connectivity and access to worker portals was made widely available, some agencies faced challenges with inadequate capacity and an increased number of simultaneous users. The volume of emails with large attachments can slow network performance, especially when they could be shared more efficiently using document sharing and collaboration platforms. Staggered work hours can reduce the number of simultaneous users.

> **Playbook in action: Statements about connectivity**
>
> A number of states have issued guidance to employees listing tasks that do not require a virtual private network (VPN) connection and tips for preserving bandwidth. → **Washington's** Human Resources COVID 19 Telework Policy Memorandum specifies, "*Unless you have a need to be continuously connected to the [network], don't stay connected. One common misconception is that you need to be connected through VPN to work on Word documents, Excel spreadsheets, PowerPoint presentations or other such items.*"

Ensure telework security

Connecting from remote locations to agency systems and resources introduces an additional element of risk, making it important to consider security implications early and often and to ensure that they are not an afterthought. The National Institute of Standards and Technology, in its 2016 guidance on telework and remote work security, advises that one should assume and prepare for the worst when considering security policies and practices. It also recommends measures to mitigate risk, which in some cases may not completely eliminate the threat.

Below: Confront security threats head on to strengthen your telework security approach

Risk	Mitigation
Devices will be lost or stolen and fall into the hands of people who will try to recover the data or use the device to gain access to your network.	▪ Encrypting the device's storage ▪ Encrypting all sensitive data stored on agency devices ▪ Not storing sensitive data on agency devices ▪ Using strong authentication—preferably multifactor—for enterprise access
Eavesdropping, intercepting, and modification of communications on external networks will occur.	▪ Using encryption technologies to protect the confidentiality and integrity of communications ▪ Authenticating each of the endpoints to each other to verify their identities

Risk	Mitigation
Telework client devices will be infected with malware.	▪ Using antimalware technologies ▪ Using network access control solutions that verify the agency's security posture before granting access ▪ Using a separate network at the organization's facilities for telework agency devices brought in for internal use

Considerations for telework security during pandemics and other emergencies. Security at all times—including during emergencies—is critical for state personnel working with sensitive Medicaid and CHIP data and/or financial information (federal tax information [FTI]) and who need to access agency resources to perform essential operations. Agencies are at an elevated risk of cybersecurity threats and can be particularly vulnerable to attacks during public health and other emergencies. This warrants special attention to planning and testing security policies and procedures and training for temporary telework in Continuity of Operations Plans. Recommendations for state agencies to enhance security readiness during emergencies include the following:

- Ensure that the security incident response process is tested for all workforce teleworking scenarios.
- Provide ongoing training and training resources to all employees on how they can recognize social engineering attacks, that is, phishing attacks; agencies should also conduct regular tests by sending fake phishing emails to staff as a training and remediation exercise.
- Bolster security monitoring capabilities to have visibility into expanded remote endpoints (laptops/mobile devices).
- Require that entities with whom the agency contracts provide emergency response plans as part of the contracting process; understand and evaluate the impacts of each vendor's/contractor's emergency response plan.

Playbook in action: Paperless work to enhance security and privacy

→ **Louisiana's** Medicaid agency has hundreds of employees who telework. Its telework policy for printing states that *"the workflow process for telework employees is paperless. For security and privacy reasons the Department does not allow printing at home and does not supply printers for telework use. Telework employees may arrange with Department technicians or agency staff to print to a printer in an agency office,"* provided that certain conditions are met. Exceptions to this policy (to allow printing) require approval from the appointing authority.

Privacy protection for Medicaid and CHIP beneficiaries. Requirements for safeguarding the privacy of Medicaid and CHIP beneficiary data are outlined in 42 Code of Federal Regulations §431.302 and go beyond the privacy requirements of HIPAA. Employees who telework should be able to recognize a privacy breach that occurs while working at an alternate work site and know how, and to whom, such incidents should be reported.

Internal Revenue Service tax data special considerations. Agencies that use FTI are required to take appropriate measures to ensure the confidentiality of FTI, which includes data residing electronically within eligibility systems and hard copies of the data. Internal Revenue Service (IRS) Publication 1075—Tax Information Security Guidelines for Federal, State, and Local Agencies—specifically addresses the subject of telework in Section 4.7 (see excerpt below and full citation in the **Resource replay** section at the end of this play). Some states do not allow access to FTI to employees who telework, which negates the need to develop a plan for periodic inspections of a sample of the telework sites or the possibility of an IRS visit to the teleworker's home.

"If the confidentiality of FTI can be adequately protected, telework sites, such as employee's homes or other non-traditional work sites can be used. FTI remains subject to the same safeguard requirements and the highest level of attainable security. All the requirements of Section 4.5, Physical Security of Computers, Electronic, and Removable Media, apply to telework locations.

The agency must conduct periodic inspections of alternative work sites during the year to ensure that safeguards are adequate. The results of each inspection shall be fully documented. IRS reserves the right to visit alternative work sites while conducting safeguard reviews. Changes in safeguard procedures must be described in detail by the agency in the SSR. For additional information, see Section 7.2, Safeguard Security Report."

Customize ongoing IT support

An important cost consideration for technology is the provision of ongoing, prompt technical support to teleworkers whose success requires dependable connectivity. With proper training and resources, virtual help desks can rapidly provide employees with the resources they need, troubleshoot issues, and enable efficient and productive telework.

Playbook in action: State IT web pages

Some states provide online technical instructions on web pages for employees working remotely, making information readily available at all hours and reducing the need to connect with an individual through technical support. Consider examples from the → **Illinois** Office of Innovation and Technology Remote Work, web page and the → **Pennsylvania** Office of Administration Telework Technology Resources web page.

Checklist

- ☐ Address gaps between existing and needed tools/technology
- ☐ Ensure telework security
- ☐ Customize ongoing IT support
- ☐ Other _____

Resource replay

- ☐ Connecticut's Official State Website. Working Remotely and Securely web page. Date unknown. https://portal.ct.gov/Government/Work-from-Home-Technology-Resources/Working-Remotely-and-Securely
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- ☐ Utah Governor's Office of Management and Budget. *A New Workplace: Modernizing Where How and When Utah Works Deployment Guide*. Date unknown. https://gomb.utah.gov/wp-content/uploads/2019/10/Deployment-Guide.pdf
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NOTES

Play 4: Measure productivity rather than presence

Use this play for thinking through –

- What can managers do to optimize telework for employee productivity and job satisfaction?
- How can you evaluate teleworker job performance? What performance goals or evaluation criteria are appropriate for telework?
- What approaches can you take to monitor compliance?

In a 2019 editorial defending telecommuting for state workers, the *Las Vegas Review-Journal* directly addressed the prevailing concern about government telework—the elephant in the room regarding the productivity of government employees who work remotely—and the importance of setting up programs appropriately to *"ensure that taxpayers are not being shortchanged by government workers."* Although it is a valid concern, the skills needed for managing, measuring performance of, and communicating with teleworkers are the same as those needed for employees who work on-site. Performance for all employees is ideally measured by productivity rather than presence.

Leverage the role of the manager to optimize telework

Telework represents a big change for managers, with many accustomed to line-of-sight management. Leaders can acknowledge the very real adjustments that managing remote workers entails and solicit the input of managers to address their concerns. Just as measuring performance of teleworkers begins with clear expectations, a manager benefits from knowing the agency's vision and goals for telework and leadership's expectations to support the agency's telework goals. Solicit input from managers on their questions and concerns not only during the planning process but also after implementation to ensure that they are continually empowered to successfully lead in a telework environment.

Clear expectations for removing guesswork. Managers should ensure that employees who telework are assigned enough meaningful work that they are challenged and stay motivated. It is important that work be equitably distributed between teleworkers and employees at the primary work site. Work assignments and expectations need to be clearly communicated in measurable terms.

Playbook in action: Resources for managers

Empowered with the proper tools and training, managers will be able to not only effectively measure performance of employees they cannot physically see, but they can also actively support and be champions for the telework program. The Frequently Asked Questions section of → **Colorado's** Department of Labor and Employment remote work web page (see cite in Resource replay section) contains practical advice and resources for management practices for remote workers. For example: Have employees send managers a list of the five things they will be working on and the expected progress at the beginning of the day. At the end of the day, they can send an update on how far they got and any roadblocks they might have faced. If employees are not meeting expectations, give them this feedback proactively. Use clear expectations laid out from the beginning to brainstorm solutions together. → **Telework Virginia's** For Managers: Do's and Don'ts list includes concrete suggestions for managers engaged in state government telework and has been incorporated by other states, including Washington, in their telework training materials.

Manager's availability to teleworking employee. Although most of the focus tends to be on employee availability, teleworking employees also benefit from having a clear understanding of their manager's availability, expectations, and preferences for communication. The manager can clearly communicate specific days and times for office hours, as well as discuss important versus urgent communication and the appropriate channel for each. Shared calendars provide a forum for clearly communicating specific office hours to employees or identifying office hours.

Tailored communications. A virtual open-door policy can still be maintained even though the manager is not physically in the same building through telephone and video conferencing, email, and instant messaging.

> **Playbook in action: Engage via video conference**
>
> During the COVID-19 pandemic, the **teams at CMCS** started to meet more in video gatherings using their laptop cameras, as opposed to conference calls. Nearly all participants reported that they felt more engaged in the meetings, the meetings were more effective, and they just really liked seeing each other again, especially after prolonged virtual work. Even if not every participant is speaking, the potential for greater team engagement and effectiveness during video meetings inspires many to be on camera whenever possible.

Below: Help managers and teleworkers understand appropriate communication tools for telework scenarios

Tool	Category	Description
Telephone and video conferencing	Synchronous = real-time communication tools	▪ Use when you are contacting multiple people, sending important/sensitive messages, or need an immediate response ▪ Gives people time to prepare and think through responses ▪ Provides context and brings people up to speed
Instant messaging	Synchronous = real-time communication tools	▪ Use when you need an immediate response ▪ Provides some context, but just enough to get a point across ▪ Limit scope—if more than two questions, might be better to use telephone or video conference
Email	Asynchronous = delayed communication tools	▪ Provides a platform for lengthy messages needing extensive detail ▪ Can be used for managing recipients ▪ Use the CC line to include people who should be kept in the loop but not held accountable for a response or action

Source: Adapted from Eickenberry K. *Leading at a Distance—Technology Tips for Remote Leader.* March 11, 2020.
https://www.linkedin.com/learning/leading-at-a-distance/technology-tips-for-remote-leader?autoplay=true&trk=learning-course_table-of-contents_video&upsellOrderOrigin=lilblog_03-11-20_new-to-working-remotely-resources_learning

The element of trust. Ernest Hemingway is credited with saying, *"The best way to find out if you can trust somebody is to trust them."* Trust that if employees are communicating clearly and meeting goals and deadlines, they are being productive and effective. Work with managers of teleworkers to be good listeners and have the capacity to communicate trust and respect without micromanaging.

Playbook in action: **Task measurement and performance**

Timely feedback helps provide teleworking employees with clarity on job performance and whether they are meeting expectations.
→ **Maryland's** State Telework Program FAQs describes a three-step process for performance measurement of employees who are teleworking and performing what they call a *nonquantifiable* or *project-oriented task*:

- Establish the nature and objective of the task
- Set a deadline or due date
- Meet for progress or status

Playbook in action: Controls to account for teleworkers

→ **Florida's** Administration for Children & Families Alternate Work Locations policy addresses record-keeping and operational controls to help accurately identify and count the number of teleworkers:

1. Telework agreements and telework terminations are sent to human resources to input telework status into the People First electronic system.
2. Manager is responsible to check and ensure that the People First telework screen is updated for employees approved to telework.
3. Human resources produces reports to assist managers to ensure that employees approved for telework are accurately recorded in People First.

Evaluate job performance of teleworkers

Although it is still very possible to observe teleworking employees through the variety of communication tools in the workplace, the need for objective performance measures is magnified. Many professional jobs in state government are knowledge worker jobs as defined in the General Services Administration issue paper Knowledge Worker Productivity: Challenges, Issues, Solutions. Knowledge workers are engaged primarily in reading, research, writing, policy development, planning, participating in meetings with vendors and external customers, preparing reports, and managing employees who do those jobs.

A question that might be asked for discussion and comparison purposes: *How do managers know that an employee they cannot physically observe is finishing assignments, meeting deadlines, and doing quality work?* Considering this together with the opposite question—*how do managers know this about an employee they CAN physically observe*—concentrates the conversation on the most essential aspects of managing productivity.

Criteria for evaluating the job performance of teleworkers. Performance is measured by results—the timeliness, quality, quantity, and cost-effectiveness of the work product—rather than by actual observation and the appearance of being busy. Consider breaking down tasks and goals into smaller components and establishing multiple deadlines for larger projects. For example, ask an employee to first produce an outline for a document you have requested and then ask perhaps for brief descriptions of the content for each area as interim steps.

Process goals in teleworker performance planning. Process goals provide a framework to help employees keep work on track and managers identify any needs for course correction. Example process goals include:

- Participation in virtual one-on-one and team meetings
- Evidence of reviewing and commenting on draft documents

- Active participation in chats and other collaboration platforms
- Submission of agreed-on status reports on time

Performance feedback in conjunction with manager check-in/report-out meetings. Managers and employees can work together to establish a schedule for periodic check-in and report-out meetings, evaluate the telework arrangement, and reinforce expectations and accountability. Below is a list of potential topics for discussion to ensure meaningful and rich check-ins with teleworking employees:

- Status of work: General and specific updates
- Roadblocks: Impediments to progress, how managers can help clear a path for success
- Performance: Input on what is going well, what is not going well, and behaviors observed; actionable steps employee can take in the future
- Well-being: Any employee needs to accommodate work-life balance
- Course correction: How to get the employee back on track when necessary
- Strengths: Understanding the employee's strengths and identifying opportunities to align accordingly

Monitor compliance with telework policies and procedures

Findings from the Government Accountability Office telework reviews and its recommendations to federal agencies can help in the selection of controls to implement to monitor program compliance. Examples include:

- Written telework agreements: Can a signed current telework agreement be produced for a teleworking employee? Does it comply with written policy for any updates?
- Training: How can completion of telework training and date of completion be documented (for both managers and employees who telework)?
- Data: How can you validate the accuracy of telework data?

> **Playbook in action: Requirements for responsiveness**
>
> Hundreds of employees at → **Louisiana's** Medicaid agency have been working at home for 12+ years. Policy and written agreements include requirements that employees must:
>
> - Have access to a telephone at all times during work hours
> - Include their phone number in their Outlook contact info
> - Respond to meeting requests
> - Be continuously logged into instant messaging for communication with manager

Checklist

☐ Leverage the role of the manager to optimize telework
☐ Evaluate job performance of teleworkers
☐ Monitor compliance with telework policies and procedures
☐ Other _____

Resource replay

☐ Arizona Department of Administration. *Telework Arizona Training Workbook and Agreement.* November 19, 2012. https://capitolrideshare.az.gov/sites/default/files/media/Telework_Workbook.pdf

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☐ Eickenberry, K. Leading at a Distance—Remote Goal-Setting video. April 30, 2019. https://www.linkedin.com/learning/leading-at-a-distance/remote-goal-setting?autoplay=true&trk=learning-course_table-of-contents_video&upsellOrderOrigin=lilblog_03-11-20_new-to-working-remotely-resources_learning

☐ Eickenberry, K. Leading at a Distance—Technology Tips for Remote Leader video. April 30, 2019. https://www.linkedin.com/learning/leading-at-a-distance/technology-tips-for-remote-leader?autoplay=true&trk=learning-course_table-of-contents_video&upsellOrderOrigin=lilblog_03-11-20_new-to-working-remotely-resources_learning

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☐ Virginia Department of Human Resource Management. *Quick Guide: Managing Teleworkers*. February 10, 2012. https://www.dhrm.virginia.gov/docs/default-source/hr/managingteleworkers.pdf?sfvrsn=2

☐ Virginia Department of Rail and Public Transportation. Telework!VA. For Managers: Do's and Don'ts web page. Date unknown. http://www.teleworkva.org/forManagers/dodont.aspx

☐ Washington Office of Financial Management. Managing Mobile Employees web page. Date unknown. https://www.ofm.wa.gov/facilities/building-modern-work-environment/connectivity

Play 5: Fortify teleworker supports

Use this play for thinking through —

- How can telework pilots or trial periods help your agency test telework processes and procedures?
- What supports can you put in place to encourage teamwork and collaboration?
- Which communication approaches can you use to engage teleworkers?
- What core telework training supports will benefit all of your workers? What telework candidate topics need a special focus?
- What special training audiences or considerations do you need to address in your telework training?

Ongoing support of teleworkers, nonteleworkers, and the overarching telework program is integral to sustainability and achievement of telework goals.

Recognize the value of pilots for agency/trial period for employee

For jobs that are not already being performed remotely or for significant changes in policies or procedures, conducting a pilot gives the agency a chance to conduct small-scale telework testing and to confirm that a job is telework eligible. Agencies can identify problems early, fine-tune telework processes and procedures, and make any other needed adjustments before wider rollout. Similarly, some employees may not be ready to commit to telework, and both the employee and manager can benefit from a trial period.

Support the meeting collaboration and teamwork needs of teleworkers

Depending on the job, employees who telework will need the ability to communicate and collaborate with coworkers to varying degrees, which may be other teleworkers and/or office workers. Teamwork and collaboration—including participation in meetings—are essential to effectively perform many jobs and can also help employees maintain productivity and remove some of the isolating aspects of telework. Develop different protocols to include teleworkers in various types of meetings with office workers and/or other teleworkers. Consider how the size of the meeting, especially large meetings, might require modified approaches.

> **Playbook in action: Telework trial periods**
>
> → **Oregon's** Telecommuting and Teleworking Guidelines & Best Practices expressly includes trial periods: *"A trial period can be a valuable tool to assess the feasibility of a proposed telecommute or telework arrangement. Depending on the length of the agreement, a trial period of 30 to 60 days is sufficient. In telework situations, the employee should have at least one or two instances of teleworking to sufficiently demonstrate his or her ability to successfully telework. The agreement can be entered into on a trial basis, with the dates or number of instances of the trial period noted in the telework agreement."*

Some employees who telework have job duties in which they have limited interaction with coworkers, whereas others may be collaborating for multiple hours per day on joint projects. Depending on the situation, a phone call or email may still be the best communication method, but a team that includes teleworkers benefits from additional tools. To understand the full potential of collaboration technology and tools, recognize that there can be a steep learning curve in gaining proficiency. Online training resources are readily available from collaboration tool software companies that can help employees get the most from the agency's investment and maximize the technology's benefits.

Workplace etiquette and multiple communication channels. The introduction of new collaboration and communication tools has changed the traditional standards for workplace etiquette. Although employees may be working at home, professionalism can continue in interactions with coworkers, customers, and external partners. There are countless approaches to leverage, and the team should be empowered to decide which tools to use and how. Tools or protocols do not have to be uniformly consistent across an organization or dictated from leadership.

Maintain engagement of teleworkers

Strategies that acknowledge teleworkers and foster engagement can help reduce feelings of isolation that some teleworkers experience and mitigate the fear of *out of sight, out of mind.* A plan for deliberate communication and inclusion can include the following:

- Creating opportunities for virtual team building and social interaction
- Vetting and sharing web-based articles and video links with tips for teleworkers
- Acknowledging special events such as Public Employee Appreciation Week
- Setting up a group or team in communication and collaboration tools for teleworkers and managers
- Sharing updates to the agency's telework frequently asked questions, survey results, and tips from members of the group
- Welcoming constructive feedback and suggestions for improving telework
- Encouraging use of video cameras during meetings

Design telework training for everyone

Training provides for greater consistency, and therefore fairness, in telework operations and serves as an important vehicle to preempt misunderstandings. All employees, including those who are not teleworking themselves, need to know some teleworking fundamentals. Training and communications around the agency's vision, goals, and business reasons for telework should be accompanied by language that explains the following:

- Expectation that neither agency operations nor customer service is diminished
- Productivity expectations are the same for teleworkers as for nonteleworkers
- Process for determining eligibility for telework for job duties as well as for employee requirements
- Process for initiating a request to telework, as well as to discontinue telework
- Protocols for scheduling meetings that include teleworker participants
- Agency's communication and virtual collaboration tools to work with employees who telework and how to use them
- Differences in on-duty status during office closures for workers who are scheduled to telework
- Readiness of nonteleworkers to temporarily telework in the event of an emergency

> **Playbook in action: Electronic signatures**
>
> Telework is more than just allowing employees to work remotely. It involves changes to how people communicate and conduct work.
>
> → **Mississippi's** Department of Health includes step-by-step instructions in its Emergency Telework Packet on how an employee can electronically sign and obtain approval to telework from both their manager and the information technology department (as required by policy) using electronic signatures.

Training provides a means for you to address any potential risks caused by worker resentment related to telework arrangement realities or misperceptions. In addition, training everyone on your telework approach creates a working understanding that you can leverage for job continuity in light of unforeseen weather-related or other office closures that might prevent office workers from traveling to the job site.

Below: Layer teleworker-specific trainings onto a core training curriculum designed for all state employees

Core Training Topics	Telework Candidate Topics
Focus core training on the practicalities of working independently and remotely, performance expectations, and identification of roles and responsibilities. Core training sessions often include the following: ▪ Work performance expectations ▪ Communications expectations ▪ Technical set-up ▪ Telework-specific software training ▪ Creation of a workspace ▪ Performance management process ▪ Any Medicaid/CHIP-specific training details	In addition to greater detail about the agency's requirements and expectations for telework, training for teleworkers and employees who are candidates for telework includes a special focus on: ▪ Work agreement specifics and triggers for updating the agreement ▪ Accessibility and communication expectations ▪ Discussion of possible feelings of isolation and that telework will be an impediment to career advancement, along with agency strategies to address these concerns ▪ Tips for setting up the home office and maintaining work-life balance ▪ Protocol to follow in case of connectivity problems and getting technical assistance ▪ Reasons telework approval could be rescinded ▪ Acknowledgment that telework does not always work out and guidance on how the employee can discontinue telework ▪ Any job-specific technical or hardware items

Playbook in action: Training that sets up teleworkers for success

Telework affects the entire team—either directly or indirectly—and it is appropriate that all employees be trained on the basics of the agency's telework program and any changes they need to make to do their job effectively. → The **Georgia** Department of Community Health and Georgia State Personnel Administration's Work Away Telework Training Manual contains a section for employees with information on home office and safety ergonomics and provides tips to teleworkers on managing work and developing good work habits. A separate section specific to managers includes suggested activities that can be done as individual or group exercises and case studies.
→ The **City and County of San Francisco's** Telecommute Policy and Program web page provides eLearning modules for employees and managers of teleworkers.

Include special telework topics

Telework manager training. Managers may also benefit from training that is specific to their role as managers. Some topics to incorporate in training for managers might include:

- Equitable assignment of work
- Measure performance rather than presence
- Metrics for managing performance, which may be volume based—for example, for eligibility or call center workers—or based on quality, timeliness, and quantity for knowledge workers
- Communication techniques for employees who work remotely
- Ideas for teambuilding
- The manager's role in overall success of the telework program, troubleshooting and identifying/communicating opportunities for improvement

Information technology and security training. When employees work off-site, information security concerns are elevated. Information technology security training, administered at the agency level, is a key element in maintaining security and Health Insurance Portability and Accountability Act requirements.

Playbook in action: Specialized training for managers

Recognize that supervising an employee who works remotely may require acquiring new skills and changes in management style. Training can acknowledge this shift and engage managers in constructively thinking about how they can know that teleworkers are completing their work (for which managers are ultimately responsible). → **Utah's** interactive training module for managers, Managing Teleworkers, includes links to additional resources for managers such as worksheets and checklists for their use. Although your state's policies may differ, much of the content applies to all telework programs. → **Connecticut's** Interim Telework Training Manual for Managers and Supervisors includes—in addition to the official policy—supplemental information: 10 steps or expectations of managers; discussion of the impact of telework on the employee, coworkers, and managers; management style considerations; dispelling myths about telework; and other management issues.

Playbook in action: Training modules for modern times

States may want to consider additional, nontechnical skills training to provide additional supports and resources for teleworkers. → **A City of Portland, Oregon** web page advertises free professional development courses intended for teleworkers to train in communications, leadership, and soft skills, in addition to courses for technical and data analytics. → **Utah's** Successful Teleworking online training for remote workers includes content on how to keep virtual meetings productive and professional, with a list of practical recommendations such as reminders for muting microphones or being aware of camera views. → The **Telework.gov** website lists Telework Etiquette Quick Tips for conference calls and meetings as well as other ways to connect in a telework environment.

Existing training for software, tools, and technologies. Telework has evolved the most in the technology available for communication, collaboration, and performance management. Training is important for employees to benefit most from tools and achieve their full potential.

The need for telework training will differ depending on the maturity of an agency's telework program and the nature of any changes or updates that the agency is making. For example:

- Is your agency substantially increasing the number of employees who will be teleworking?
- Is your agency making significant changes to its telework policy?
- Has the written telework agreement undergone a major revision?
- Are you introducing new communication or collaboration tools for telework?

Training for employees who already telework. If an agency makes any substantial updates to telework policies, procedures, or forms, a special training may be appropriate for employees who already have approval to telework.

Training for employees new to telework. Training needs for a temporary or short-term telework program differ greatly from those for ongoing telework. When time is of the essence, such as during an emergency, a deliberative and collaborative planning process for training is not realistic. Policies mandating completion of training prior to beginning telework may need to be waived, or training may need to be limited to essential or need-to-know topics.

Training before approval of telework arrangement. Many telework policies include a requirement that an employee receive training before beginning telework. Training for individual employees can include a simulation of completing a telework application, a telework agreement, a work plan, as well as a self-assessment of both the job and the employee for telework.

Explore telework online training

There are many ways to engage your audience in telework training besides instructor-led training. Consider the value of having a one-stop shop web page for your telework initiative and the resources that can be included: formal policy; application form, if applicable, and telework agreement as fillable forms; and training materials. Also include relevant links, for example, any state telework statutes or executive orders, self-service technical support tutorials or instructions, and frequently asked questions.

Below: Many state and local government telework web pages are one-stop shops

State or Municipality	Manager Training Resources	Employee Training Resources	Telework Policy and Forms Training	Technology and Security Training	Links to External Training Resources (Examples)
Arizona Capitol Rideshare/Telework	✓	✓	✓	✓	—

State or Municipality	Manager Training Resources	Employee Training Resources	Telework Policy and Forms Training	Technology and Security Training	Links to External Training Resources (Examples)
Colorado Division of Human Resources in the Colorado Department of Personnel and Administration	✓	✓	✓	✓	–
Connecticut Interim Telework Program	✓	✓	✓	✓	–
Massachusetts Telework for Commonwealth Employees	✓	✓	✓	✓	Telework.gov Government Accountability Office
City and County of San Francisco Telecommute Policy and Program	✓	✓	✓	✓	–
Utah A New Workplace	✓	✓	✓	✓	Google Meet Google Chat
Virginia Teleworking Guidance for Supervisors and Managers	✓	✓	✓	✓	–

Documentation of training. State agencies can plan ahead for the possibility of internal and external audits and compliance monitoring. If policy stipulates that employees be trained prior to beginning telework, ask yourself the following:

- What controls do you have in place to ensure adherence to the policy?
- How will you document the date the employee began teleworking and the date of training?
- Where and how will telework documentation—training and telework start dates—be maintained?

Telework security training. In planning security-related training content for teleworkers, basic security concepts such as using strong passwords and recognizing phishing attempts are important. The National Institute of Standards and Technology's one-page Telework Security Overview & Tip Guide contains six basic security tips for teleworkers that provide helpful training and resources. Because security training for teleworkers—and all employees—is highly technical, it can help to include the potential consequences of lax security by a single employee: operational downtime for agency systems, citizen frustration from inability to access state services, significant financial impacts, or an overall poor reflection on the agency.

Checklist

- [ ] Recognize the value of pilots for agency/trial period for employee
- [ ] Support the meeting collaboration and teamwork needs of teleworkers
- [ ] Maintain engagement of teleworkers
- [ ] Design telework training for everyone
- [ ] Include special telework topics
- [ ] Explore telework online training
- [ ] Other _____

Resource replay

- [ ] Arizona Capital Rideshare. Telework web page. Date unknown. https://capitolrideshare.az.gov/telework
- [ ] City and County of San Francisco, Department of Human Resources. Telecommute Policy and Program web page. Date unknown. https://sfdhr.org/telecommute
- [ ] Connecticut Department of Administrative Services. Interim Telework Program web page. Date unknown. https://portal.ct.gov/DAS/Statewide-HR/Telework-Program/Documents
- [ ] Connecticut Department of Administrative Services. Interim Telework Program web page. See document titled *Interim Telework Training Manual for Managers and Supervisors*. Date unknown. https://portal.ct.gov/DAS/Statewide-HR/Telework-Program/Documents
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- United States Office of Personnel Management. Telework Etiquette Quick Tips web page. Date unknown. https://www.telework.gov/federal-community/telework-managers/telework-etiquette-quick-tips/
- Utah Department of Human Resource Management. Managing Teleworkers. Date unknown. https://s3.amazonaws.com/managingtelework/content/index.html#/
- Utah Governor's Office of Management & Budget. State of Utah Teleworking Initiative. A New Workplace: Modernizing Where, How and When Utah Works web page. Date unknown. https://gomb.utah.gov/a-new-workplace-modernizing-where-how-and-when-utah-works/
- Utah Governor's Office of Management & Budget. State of Utah Teleworking Initiative. Successful Teleworking: Plan Your Communication [training modules]. Date unknown. https://s3-us-west-2.amazonaws.com/successfultelwork/content/index.html#/lessons/MpITIIglGrgBUx2FRMYadJdswAK0Tees
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- Virginia Department of Human Resource Management. Teleworking: Guidance and Assistance for Supervisors and Managers web page. Date unknown. https://www.dhrm.virginia.gov/hr-partners/telework

NOTES

Play 6: Use telework to enhance agency resiliency in emergencies

Use this play for thinking through –

- What emergency or temporary telework policies and procedures do you need to distinguish from your regular telework approach?
- What kinds of equipment and technology do you need to support emergency telework?
- What can you put in place now to have emergency telework communication channels ready and resources retrievable in times of emergency?
- What actions can you take now to prepare agency and staff for emergency telework?

The 2020 COVID-19 pandemic was the catalyst for hundreds of thousands of state employees—including those in Medicaid and CHIP administrative jobs—to work remotely, many for the first time. Experiences from these emergency telework pilots, along with the experiences of thousands of other public and private employers, can inform Medicaid and CHIP agencies as they undertake after-event assessments and plan for telework readiness on day one of future emergencies.

Playbook in action: Modernization and telework

In 2004, the → **Louisiana** Department of Health initiated a project to gradually convert paper to electronic case records for all new applications and renewals. By July 2005, the agency had started an electronic case record for every active case. Besides providing immediate benefits—*never lose a case record, illegible handwriting a nonissue, no problem when people move between parishes*—the agency had a modern casework approach in place a month before Hurricane Katrina later in August. Having all of the applications and case records 100 percent electronic meant that Medicaid applications, renewals, and changes could be processed from any location as long as eligibility employees could connect to the system.

Distinguish emergency or temporary telework policies and procedures

Many organizations have developed stand-alone policies and procedures for temporary or emergency telework. There are numerous similarities between an ongoing telework program and temporary telework during emergencies. The key differences are the need for immediacy and the potential for relatively short duration for some employees during emergencies.

Requirements for written telework agreements. Although signed agreements were waived by some states during the COVID-19 pandemic, others still required written agreements, some with tools for electronic signatures. In the absence of a signed telework agreement, some states required managerial approval. Besides these approaches, states could also use a notice with key information that employees are required to acknowledge receiving and then return.

Reduction in training scope for emergencies. Training staff to telework more effectively, even if the training is done virtually, may not be realistic as a condition for approval to work remotely, especially once an actual emergency has started. Training can focus more on the basics and use a need-to-know approach and less on the needs for long-term telework, such as team building.

Allowance of tasks outside of job assignment. Although certain jobs cannot be performed outside the primary work site, some states have encouraged agencies to consider assigning employees performing

these jobs to other tasks that are consistent with the overall mission and goals of the agency. Important but often less prioritized tasks—such as reviewing and updating job descriptions—can also receive attention that they might not otherwise receive. Employees can also complete any mandatory annual online training requirements.

Revision of temporary restrictions on use of personal devices. Agencies may have established policy on connecting personal computers and devices to agency systems. If allowed, outline any specific conditions or approvals necessary for using personal devices that may be more liberal during an emergency than for regular telework. Agencies may want to give careful thought to identifying risks and mitigations associated with connecting personal devices to their platforms and systems and then clearly articulate the position in temporary telework policy.

Identify equipment and technology needs for emergency telework

Below are important steps to address the equipment aspect for temporary telework:

- Conduct an inventory of agency-owned equipment and software licenses and identify gaps
- Consider all possible options for computers and phone access
- Acquire additional agency-owned resources if this is a need and the budget allows
- Assess the risks and decide your agency's stance on use of employee-owned devices
- Have a plan for intensive technical support for employees new to telework, including self-service options

Options for computer hardware include agency-issued laptops, tablets, and desktop computers. Options for phone access include agency-issued phones, soft phones (Voice over Internet Protocol [VoIP]), and use of the employee's personal phone.

During an actual emergency situation, Medicaid or CHIP agencies may need to purchase technology. In certain circumstances, CMS can expedite approval of federal funding. Emergencies need not be a federally declared emergency and can include several different scenarios. Contact your CMS state officer to explore options.

Think ahead to emergency telework communications

Public one-stop shop temporary telework web pages provide the widest access to essential employee information and do not require special connectivity to the agency's internal systems. Content can include links to temporary telework policy, any required forms, instructions for applicable digital signatures, links to online training resources, and frequently asked questions.

Playbook in action: Job assignments in emergency status

→ **South Carolina** encourages agencies and institutions to think creatively about remote work opportunities and consider assigning jobs duties that are outside an employee's normal functions but that *"still serve the overall mission of the agency, promote efficiencies and improve performance."* South Carolina's Ideas for Working Remotely web page provides examples on how to facilitate telework and encourages agencies to submit additional ideas to the Division of State Human Resources.


Playbook in action: Special telework agreements

During the COVID-19 pandemic, → **Maryland** expressly relaxed certain requirements. The state's one-page Interim Pandemic-Associated Teleworking Agreement:

- Directs employee to work at home
- Relaxes policy on childcare
- Gives option to choose flexible work hours or normal work hours
- Reminds employees to perform only official duties and refrain from personal business
- Confirms that contact information in state personnel system is up to date
- Requires that employee initial to acknowledge receipt of agreement and return

Playbook in action: Videos for just-in-time training

→ **Pennsylvania's** Office of Administration developed short YouTube videos for Top 10 Teleworking Tips, with topics such as:

- Organize each workday
- Practice using technology tools
- Remain contactable and responsive
- Use Outlook calendar and schedule work
- Have meaningful check-ins with manager
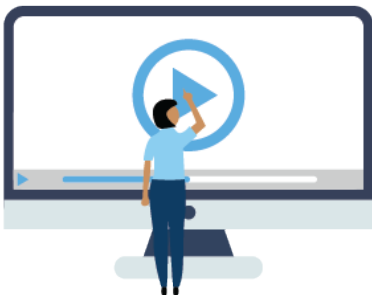
Weather-related disasters, such as hurricanes and flooding, may challenge the dependability of the communications grid. Some landline calls may be possible, but cellular service could be spotty or nonexistent—or vice versa, with messages such as *all circuits are busy.* Widespread and prolonged power outages affect the ability to recharge battery-operated devices and access email or the internet. Consider how displaced employees can be empowered to work remotely from wherever they are to ensure that essential services continue.

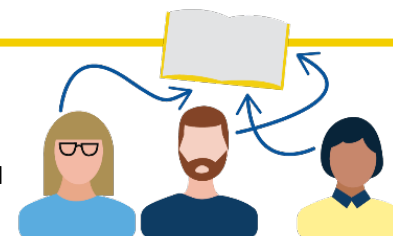## Maintain a continuous state of readiness for telework

The following are some examples of actions to stay prepared for emergency telework:

- Maintain a current list of employees more likely to need to work remotely, which could include employees who are aged 65 years and above, who have underlying health conditions, who have dependent children, or, for natural disasters, who are anticipated to be subject to evacuation orders.
- Identify jobs that can only be performed in the office. For Medicaid and CHIP administration, these are primarily paper processes that still exist and that are associated with the showstopper functions of enrolling people and paying providers.
- Establish a maintenance schedule for frequent laptop updates with current software, patches, and more—including both unassigned laptops and laptops that are assigned to an employee but could be seldom used.
- Set up a process and perform the necessary prework to facilitate obtaining telework approvals through electronic signatures and compile instructions.
- Have a plan and a widely understood process to regularly affirm that employee contact information is current with backup phone numbers and backup email addresses.

Consider the degree to which successful job performance depends on availability of and collaboration with other state agencies and vendors, work with them to develop processes, and include these processes in contracts and interagency agreements.

Playbook in action: Lessons learned from operations during Hurricane Katrina

By definition, emergencies that require working remotely are unanticipated and unplanned, but deliberate, ongoing steps and practice can enable an agency to stay prepared and more nimbly transition to working remotely. → **Louisiana** Medicaid planning for Hurricane Katrina did not commence until after the close of business on Friday August 26, 2005, when the storm took an abrupt turn. Medicaid managers had no idea when they left the office that they would be scrambling from their homes on Saturday morning to locate contact information for employees as a massive evacuation effort was underway. Resulting lesson learned: For backup purposes, managers should maintain paper copies of contacts at home at all times, including information for colleagues and staff—a landline phone number, work cell number, personal cell number, work email address, and personal email address.

Checklist

- ☐ Distinguish emergency or temporary telework policies and procedures
- ☐ Identify equipment and technology needs for emergency telework
- ☐ Think ahead to emergency telework communications
- ☐ Maintain a continuous state of readiness for telework
- ☐ Other _____

Resource replay: Examples of temporary telework agreements

- ☐ Florida Department of Management Services. *Agreement for Temporary Telework Arrangement Template.* Date unknown. https://www.dms.myflorida.com/content/download/148250/989596/Telework_Guidance_for_Employees_of_the_State_Personnel_System.pdf
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- ☐ Maryland. *Interim Pandemic-Associated Teleworking Agreement*. March 2020. https://dbm.maryland.gov/employees/Documents/Interim%20Teleworking%20Agreement%20COVID-19%20Response.pdf
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Resource replay: Examples of temporary telework policies

- ☐ Georgia Department of Community Health, Office of Human Resources. *Pandemic Influenza Workforce Readiness Manual.* October 16, 2009. https://dch.georgia.gov/documents/dch-ohr-pandemic-emergency-workforce-readiness-manual-v80
- ☐ Kennedy R. Primary interview about Louisiana Medicaid Work. May 20, 2020.
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Resource replay: Examples of temporary telework web pages

- [ ] Commonwealth of Pennsylvania, Office of Administration. State Employee Temporary Telework web page. Date unknown. https://www.oa.pa.gov/telework/Pages/default.aspx
- [ ] Washington Office of Financial Management. COVID-19 Telework Policy Memorandum web page. Updated April 14, 2020. https://ofm.wa.gov/state-human-resources/coronavirus-covid-19-hr-guidance-state-agencies/covid-19-telework-policy-memorandum

Resource replay: Examples of temporary telework employee and manager training resources

- [ ] Colorado Department of Training and Employment. Working from Home? Managing a Remote Team? Maintain Your Productivity with These Best Practices web page. Date unknown. https://www.colorado.gov/working-home-managing-remote-team-maintain-your-productivity-these-best-practices
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- [ ] Washington Office of Financial Management. Emergency Telework Resources During COVID-19 Pandemic web page. May 4, 2020. https://ofm.wa.gov/state-human-resources/coronavirus-covid-19-hr-guidance-state-agencies/emergency-telework-resources-during-covid-19-pandemic

Resource replay: Examples of temporary telework technology training resources

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Resource replay: Examples of temporary telework planning

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- [ ] Ohio. *Pandemic Planning for Ohio's State Agencies*. 2009. https://procure.ohio.gov/pdf/SAPP_9_23_09.pdf
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About this file and the research methodology: This document was prepared by IBM Watson Health and subcontractors as part of the Medicaid Innovation Accelerator Program on behalf of the Centers for Medicare & Medicaid Services (CMS), to assist Medicaid and Children's Health Insurance Program (CHIP) agencies in administration of telework or remote work programs. This document is a compilation of publicly available information from organizations, including federal, state, and local governments in the United States, in addition to two primary source anecdotes provided by Ruth Kennedy for the State of Louisiana. This information was not verified for accuracy, implementation status, or timeliness. More updated information may exist. States were selected based on availability of public/open source information and the relevance for the topic. All states were selected to add value; the team considered the balance of state examples broadly across the document to ensure variety. Information in hyperlinks was compiled from April to June of 2020 and was available via the links provided as of August 14, 2020. Other information that informed parts of this document was provided to IBM Watson Health, subcontractors, and CMS staff by Center for Medicaid and CHIP Services (CMCS) leadership, the National Association of Medicaid Directors, and vendors to the CMCS Data & Systems Group.

This compendium is not intended as guidance from CMS. It does not replace or serve as a substitute for CMS requirements and policy. The actions outlined in this document have not been evaluated for effectiveness by CMS or any government agency. This compendium is solely an informational product offered by CMS to state Medicaid and CHIP agencies as well as state and local officials.

CMS may update this document to incorporate additional content, best practices, and links to materials for telework and remote work that states share. States are encouraged to submit updates or direct any media inquiries related to this document to Medicaid.gov@cms.hhs.gov.