

CalPERS Telework Program



2000 Policy & Procedures

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The California Public Employees' Retirement System (CalPERS) encourages and promotes the use of telework as a viable management work option. Telework means working one or more days away from the central office, either at home or in an alternative worksite. This policy recognizes the business, societal, and personal benefits available through a carefully planned and managed telework program.

CalPERS expects to benefit through the use of telework in the following ways:

- improve employee effectiveness, productivity and morale;
- facilitate optimum utilization of CalPERS office facilities;
- reduce absenteeism;
- promote employee health and wellness;
- improve employee recruitment and retention;
- improve air quality and reduce traffic congestion;
- enhance the working life and opportunities of persons with disabilities; and
- effectively resume business as part of a disaster recovery or emergency plan.

Purpose

Telework is an alternative method of managing work and a work arrangement that assists in accomplishing the mission of CalPERS. The purpose of this policy is to define the Telework Program of CalPERS and the rules and guidelines under which it operates.

Scope

This policy applies to all the telework activities of CalPERS. All managers, supervisors, and teleworkers shall be familiar with the contents of this policy.

Authority

Government Code Sections 14200-14203, authorize every State Agency; including every Board and Commission, to incorporate telecommuting¹ as a work option. CalPERS has delegated authority to establish a telework program within this department.

The Department of General Services has the statutory responsibility to provide technical assistance to telework programs for Departments, Boards, and Commissions of the State of California. This Telework Program is consistent with the guidelines established by the State Telework Advisory Group and relevant collective bargaining agreements. The Department of General Services and the Department of Personnel Administration currently have a Memorandum of Understanding that provides joint responsibility for technical assistance to State agencies.

¹ For purposes of this document, the term *telecommute*, and its derivatives, will be replaced with the term *telework*, and its respective derivatives, unless directly quoting current law.

Program Components

Responsibilities

CalPERS is responsible for the implementation of the Telework Program and encourages the use of the telework option where workload and work conditions warrant.

CalPERS will ensure that:

- Employee compensation, benefits, work status, and work responsibilities will not change due to participation in the Telework Program.
- The amount of time the teleworker is expected to work per pay period will not change.
- Telework managers and employees will receive program training prior to the commencement of approved telework arrangements.

Executive Staff

The Executive Staff are responsible for actively encouraging managers and supervisors to use telework where workload and work conditions warrant.

Division Chiefs

Division Chiefs are responsible for administration of the Telework Program in their divisions which will include approving Telework Plans, budgeting necessary resources, and ensuring compliance with all applicable policies, procedures, and guidelines.

Managers And Supervisors

- Managers and supervisors are encouraged to support the use of the telework option, whenever appropriate.
- Managers and supervisors are responsible for identifying positions suitable for the telework option.

- Managers and supervisors are responsible for determining if telework by their employees will contribute to CalPERS' program objectives, while maintaining or improving efficiency, productivity, and customer service.
- Managers and supervisors of teleworkers are responsible for the day-to-day performance of those employees, just as they are for employees who are on-site.
- Just as with non-telework employees, managers and supervisors are responsible for providing specific, measurable, and attainable performance expectations for the teleworker. They must define in detail assignments, corresponding deadlines, and the quality of work expected.
- Managers and supervisors of teleworkers shall attend formal telework training.

Employees

- Employees shall become familiar with the guidelines contained in the CalPERS Telework Program Policy and Procedures, which can be accessed on the Human Resources web page on the Insider. (Additional copies are also available through the Telework Program Coordinator in the Human Resources Division.)
- Interested employees are responsible for submitting a request to telework to their supervisors. If telework is determined to be a viable work option, employees are responsible for working with their supervisors to develop acceptable Telework Plans.
- Employees approved for telework shall attend formal employee telework training.
- Employees who telework are responsible for abiding by the provisions set forth in the CalPERS Telework Program Policy and Procedures.
- Employees who work at home as part of the Telework Program are responsible for

establishing and maintaining a work area that is clean, safe and free from hazards. Employees will be required to complete the “Safety Checklist,” see Attachment D, and certify to its accuracy on a quarterly basis.

- Employees will be responsible for maintaining personally-owned equipment, devices, and services associated with achieving a safe and healthful home office.
- Employees will be responsible for ensuring that any state-owned equipment in their possession is well cared for and secure.
- Employees will be responsible for the repair and/or replacement of state-owned equipment, entrusted to them which is damaged, lost, or stolen due to gross negligence.
- Employees are responsible for their own compliance with tax laws. CalPERS is not responsible for substantiating an employee’s claim of tax deductions for operating an office in the employee’s home. Employees should seek advice from their tax advisor concerning home office deductions.

Human Resources Division

The Human Resources Division is responsible for:

- The overall coordination and monitoring of the CalPERS Telework Program.
- Employee relations, personal safety, and training aspects of the telework option. The Human Resources Division will evaluate all relevant employee relations policies and procedures to ensure that the Telework Program is consistent with the employee relations and safety aspects of other CalPERS programs and policies, including home office worksite inspections, when necessary.
- The Human Resources Division will designate a Telework Program Coordinator who will:
 - Assist managers and supervisors in understanding and using the CalPERS Telework Program Policy and Procedures.
 - Update and maintain the CalPERS Telework Program Policy and Procedures.
 - Monitor and evaluate the operation of the Telework Program on a continuing basis and recommend refinements as needed.
 - Answer any questions and address issues relating to the Telework Program.
 - Represent CalPERS management with respect to the applicable policies, procedures, and guidelines.
 - Represent CalPERS on the State Telework Advisory Group.

Operations Support Services Division

When requested, the Operations Support Services Division will provide:

- Guidance in defining the appropriate ergonomic set-up of home-based telework space and/or alternative worksites.
- Assistance in defining, procuring, and maintaining the appropriate voice and/or data communications equipment and services for an alternative worksite or home-based telework space.
- Guidance and assistance in the acquisition of alternative worksites.

Information Technology Services Division

When requested, the Information Technology Services Division will:

- Ensure that all software installed for the telework option will be in accordance with software copyright laws and be compatible with CalPERS software standards.
- Provide assistance to managers and supervisors in assessing computer equipment issues, and provide normal oversight and

support regarding equipment and other information and technology needs associated with telework.

- Provide assistance in defining, procuring, installing and maintaining the appropriate data communications equipment, software and services for an alternative worksite or home-based telework space.

Services, Equipment Assignment, Maintenance, Repair, and Replacement

Telework does not necessarily entitle the employee to be assigned department-owned equipment such as: computer, software, printer, fax machine, furniture, or a business telephone line. Not all teleworkers will be performing functions which require this equipment or service. For example, some teleworkers will be able to perform their job functions outfitted merely with pads of paper and pencils.

CalPERS may provide office equipment and related supplies for use by the employee while teleworking. The equipment needed for telework will be determined on a case-by-case basis by the supervisor and employee.

CalPERS-provided equipment that is purchased and/or permanently assigned for telework must be reported to the Property Controller in Operations Support Services Division. Telework equipment purchases in excess of five thousand dollars or those that have been identified as a sensitive item, and lap top computers may be tagged by either Information Technology Services Division or the Property Controller in Operations Support Services Division for property inventory purposes.

CalPERS will provide a fire extinguisher and/or smoke detector when necessary for the employee to meet identified safety requirements in the home office environment. Review “Setting

up a Home Office” and “Safety Checklist,” see Attachments C and D. Teleworkers shall be responsible for bringing in CalPERS-provided fire extinguishers for annual service (pursuant to the authority of the Health and Safety Code Section 13190.2).

If the supervisor determines that the employee should have CalPERS equipment in their residence, the equipment will be provided with the appropriate Division Chief’s approval. The selection, installation, repair and maintenance of the department-owned telework equipment is the responsibility of CalPERS.

The Division Chief is responsible for tracking all department-owned equipment and maintaining an equipment inventory of any equipment assigned for telework, as well as notifying appropriate inventory control personnel, which includes the Telework Program Coordinator.

The employee acknowledges that the use of equipment, software, data and supplies provided by CalPERS is limited to authorized persons and only for purposes related to CalPERS business.

In the event that CalPERS deems the employee’s job no longer qualifies for telework equipment and/or services or the employee terminates employment with CalPERS, the employee is required to return all department-owned equipment, software, data, and supplies. CalPERS will determine when equipment will be removed, or its use discontinued, with a minimum notice of two working days notice to the employee.

The employee acknowledges that an appropriate workspace will be designated within their home for placement and installation of any department-provided equipment.

Any change in a teleworker’s in-home workstation; which involves relocation of installed equipment owned by CalPERS such as a

business telephone line, computer or printer, must be approved in advance by the teleworker's supervisor. If a teleworker is moving to a new residence and has an existing business telephone line owned by CalPERS in their current residence, Operations Support Services Division must be notified of the move prior to the teleworker vacating the residence, to ensure the telephone line is disconnected before a new resident moves into the current residence.

When considering the installation of a business line in a teleworker's home, it should be noted that in some cases trenching may be necessary to lay additional cable. Most homes are wired to allow for a maximum of two separate telephone lines. If a teleworker already has two telephone lines in their home, additional cable will be needed to allow for a third. If the home has underground cable, trenching will be required to lay the additional cable. If the home is located in a neighborhood with aerial cable (telephone pole cabling), trenching will not be necessary. Any additional costs which may be necessary for trenching, should be considered by the Division Chief when approving the installation of a telephone line.

In the case of equipment malfunction, the teleworker must notify their supervisor immediately. If repairs will take some time, the teleworker may be asked to report to the central office until the equipment is usable.

Department-owned computer equipment will have the standard configuration which is currently supported at CalPERS. Technical support, including troubleshooting and maintenance, is available for this equipment through contact with the Information Technology Services Division Customer Support Center.

Although CalPERS-provided equipment is preferred, employee-owned personal computer equipment may be used for telework provided

the equipment has been determined to be capable of supporting the teleworker's needs and meets the minimum hardware requirement specified by Information Technology Services Division. Selected software is available by request to teleworkers for installation on employee-owned computer equipment.

The teleworker shall be responsible for performing the installation and configuration of CalPERS-provided software on employee-owned computer equipment. Technical support for employee-owned equipment is limited to instructions for the installation and use of CalPERS-provided software.

CalPERS does not assume any liability for loss, damage or wear of employee-owned equipment as a result of telework-related activity. Employee-owned equipment maintenance and repairs remain the responsibility of the employee.

Reimbursable/Shared Costs

CalPERS will reimburse employees who telework for business expenses necessary for the performance of work assignments. All such reimbursements must be approved by the supervisor of the teleworker. Recovery of costs will be made via normal departmental purchase and/or reimbursement procedures.

It is permissible for approved teleworkers to take a reasonable number of office supplies (pens, pencils, stationery, envelopes, etc.) home for telework use. Necessary supplies should be obtained from their division.

Usage charges for an in-home dedicated voice or data line will be reviewed and submitted for payment by the Operations Support Services Division. Teleworkers using their own residential telephone for business-related calls may be reimbursed for those expenses. The teleworker should submit a travel expense claim; along with a copy of the billing, to the Administrative

Program Components

(Continued)

Accounting Unit, Fiscal Services Division, for reimbursement. CalPERS will not be liable for telework expenses NOT identified in the Telework Plan, including but not limited to, any investment in furniture or equipment for the designated workspace in the home office.

Any telework expenses not specifically covered in this policy will be considered on a case-by-case basis between the employee and supervisor.

Authorized Expenses

Computer hardware and software purchases must be processed through Information Technology Services Division. All in-home office purchases, other than computer hardware and software, must be processed through the Operations Support Services Division purchasing section. Existing procedures require that all invoiced goods have a purchase order in place prior to the goods being provided. All department-provided furniture, calculators, computer equipment, etc. must be tagged as CalPERS property before placement or installation at the teleworker's in-home office. Employees must use items available through their division or area office whenever possible.

Division Chiefs must go through normal channels for approval consistent with CalPERS procedures to authorize expenditures for office equipment, software, office supplies, communication devices, and office services needed by teleworkers in their home offices.

Work Environment

The opportunity to participate in a home telework program is offered with the understanding that it is the responsibility of the employee to ensure that a safe work environment is maintained.

Day care should not interfere with work. Day care arrangements should be made if necessary. Personal disruptions such as non-business telephone calls and visitors should be kept to a minimum. The work hours and work area(s) shall be identified in the Telework Plan. Additionally, the work area should be off-limits to all non-CalPERS employees during work hours. Review "Work Environment Criteria" and "Setting Up a Home Office," in Attachments B and C.

Employees who telework will be expected to work at the central office on their non-telework days. Managers and supervisors are responsible for ensuring that telework employees have adequate office space available to them on their non-telework days and ensure that the teleworker's files, related equipment, and telephone lines are available.

Health and Safety

Employees are responsible for self-certifying that their home office complies with identified safety requirements. Review "Safety Checklist," in Attachment D.

Although employees will be permitted to certify their home office meets identified safety requirements, management retains the right to visit the home office work environment and/or make inquiries as to the status of the home office environment. However, any such visits shall be made with 24-hour notification from the supervisor, except in case of an emergency. Failure to maintain a safe work environment, in accordance with this policy, is cause for terminating an employee from the Telework Program.

Home offices are expected to be clean and free of obstructions and hazards. Review the guidelines "Setting up a Home Office," in Attachment C, and the Department of Personnel

Administration's Computer User's Handbook which is contained in the CalPERS Injury & Illness Prevention Plan. Teleworkers are certifying that their homes comply with the identified safety requirements when they complete and sign the "Safety Checklist," see Attachment D.

Employees who telework must have fire protection equipment in the home. Fire protection equipment requirements and guidelines can be reviewed in "Setting up a Home Office," see Attachment C. Teleworkers are encouraged to have pre-established evacuation plans and First Aid supplies, see "Safety Checklist," in Attachment D.

If an employee incurs a work-related injury while teleworking, workers' compensation laws and rules apply just as they would if such an injury occurred at the central office. Employees must notify their supervisors immediately and complete all necessary documents regarding the injury.

Information Security

Security of confidential information is of primary concern and importance to CalPERS.

Teleworkers, like all State employees, are expected to adhere to all applicable laws, rules, regulations, policies, and procedures regarding information security. All CalPERS information assets (CalPERS equipment, CalPERS software, and CalPERS confidential information) used within the Telework Program are subject to these security policies. Teleworker's responsibilities relative to information security, are listed below:

- Use CalPERS information assets only for authorized purposes.
- Back up critical CalPERS information on a regular basis to assure the information can be recovered if the primary source is damaged or destroyed.

- Use "logon" and "screen saver" passwords on all systems containing confidential CalPERS information and keep those passwords secure.
- Use the latest virus protection software, which shall be provided by CalPERS, on telework systems used to prepare information for subsequent use on CalPERS systems.
- Return all material (paper documents, diskettes, etc.) containing confidential information to CalPERS for proper handling or disposal, (e.g. Certified Destruct), if necessary.
- Adhere to copyright law by not copying or sharing any CalPERS-owned software utilized by teleworkers.
- Ensure that CalPERS confidential information is not disclosed to an unauthorized person.
- Notify the Information Security Officer of any suspected or actual security violation.

Teleworkers must understand that adherence to the above policies is an essential requirement of the Telework Program. Failure to comply with these provisions may be cause for terminating participation in the Telework Program and/or possible adverse action.

Implementation Process

Eligibility

Only permanent civil service employees are eligible for participation in the Telework Program. This includes probationary employees and limited-term (LT) employees who have previously attained permanent status. The opportunity to participate is voluntary and subject to prior approval by both the employee's immediate supervisor and the Division Chief. Approval shall not be unreasonably denied. Approval will be completed by execution of a Telework Request Package setting forth the terms and conditions that will be observed by both the telework employee and the supervisor. Review "Considerations for Selecting Teleworkers," in Attachment A, for information on identifying potential telework positions and telework employees.

The supervisor and employee will discuss and review the employee's telework arrangement at least annually.

Telework is selected as a feasible work option based on a combination of job characteristics, satisfactory employee performance, and a good working relationship between supervisor and employee. A change in any one of these elements requires a review of the feasibility of telework.

The supervisor should not base the decision for participation in the Telework Program on employee willingness to use personally owned equipment. The existence of employee-owned equipment, or lack thereof, should not be the sole determining factor when selecting telework as a feasible work option.

Employees previously participating in a telework assignment will have no automatic right to telework following their leave (e.g. returning from a leave of absence or after a job transfer).

Scheduling

The specific schedule for when telework will take place will be established prior to starting the telework arrangement.

Telework days are to be scheduled in advance and must be mutually agreed to by the telework employee and the supervisor. Any change in the agreed upon schedule must be approved by the supervisor, and when permanent, documented and appended to the Telework Plan. In addition, the supervisor and the teleworker must take actions to prevent the teleworker from becoming isolated from the central office staff.

A teleworker must forgo telework if needed in the office on a regularly scheduled telework day. The employee is only to be called into the office, on regular telework days, when necessary to meet operational needs. The manager or supervisor should provide reasonable notice whenever possible. However, the employee may be required to report to the office without advance notice, as needed.

While working away from the central office, telework employees must be accessible for communication (e.g., telephone, answering machine, voice mail, pager, email, etc.). Supervisors are encouraged to allow for flexibility in accessing a telework employee.

All procedures for requesting and approving leave usage, overtime, or alternative work schedules will be consistent with those used for non-telework employees.

Types of Telework Schedules

Regular—Regular telework means an established schedule of days per week or month.

Casual Telework—It is the policy of CalPERS that employees may be allowed to telework on a temporary basis as their duty assignment permits. If the request is of a medical nature,

written verification must be provided by a doctor or other licensed practitioner. Circumstances which may be appropriate for “casual” telework include, but are not limited to:

- during convalescence from injury or illness;
- while a family member is recovering from an injury or illness and needs in-home assistance;
- during the last few weeks of pregnancy, and/or following the birth of a child;
- while all reasonable commute routes are blocked (i.e., major construction, storm, or disaster);
- if primary worksite is inaccessible or uninhabitable; or
- if special project work requires an extended period of uninterrupted time.

Full-time (100% of Teleworker’s Hours)— Full-time telework is permissible only when necessary and justified (e.g., to accommodate medical restrictions or physical disabilities) and depends on the needs of the job.

Employee Rights

Employee rights provided in the employee’s collective bargaining agreement, including the right to meet with their representative (e.g. job steward), are not affected by participation in a telework program. Employee meetings with job stewards will normally take place at the employee’s central office. None of the rights or benefits provided under the employee’s collective bargaining agreement between the State and the employee unions are enhanced or abridged by the implementation of a telework program.

Terminating Participation

The CalPERS Telework Program is a bilateral voluntary arrangement between CalPERS and the telework employee, and can be discontin-

ued at either party’s request. Should an employee’s participation in the Telework Program be terminated, the employee must report back to the central office.

The employee may terminate their participation in the CalPERS Telework Program at any time; for any reason, upon written or verbal notice to their supervisor.

Management may terminate an individual employee’s participation in the Telework Program at any time, with explanation for the following reasons:

1. For changed circumstances, operational needs, or performance-based reasons, upon providing 30 calendar days prior written explanation to the affected CalPERS teleworker.
2. For cause, upon provision of 24-hour prior written or verbal explanation to the affected employee. All verbal explanations will be followed with a written explanation, within 30 calendar days.

CalPERS may terminate or temporarily suspend its Telework Program for any reason, at any time, with advance written explanation to participating employees and to the union.

Telework Plan

The Telework Plan provides a way to verify that all essential components of a telework arrangement with an employee have been included prior to the actual start of teleworking and that the teleworker and supervisor have read and understand the Telework Program Policies and Procedures. The Telework Plan must be reviewed and renewed at least annually.

The Telework Program Policy and Procedures requires that employees requesting to telework must have attained permanent status. Probationary employees or those on a limited-term appointment are also eligible if they have prior permanent status.

Many CalPERS jobs contain tasks which are suitable for teleworking to some degree. This information is provided to facilitate a discussion between the employee and supervisor. Tasks that can be successfully managed in Telework Programs are those where the individual already works alone handling information, such as writing, reading, analyzing, telephoning, computer programming, word processing, data entry or jobs involving considerable work-related travel. Although there are no hard and fast criteria, there are considerations which should be addressed on a case-by-case basis, related to specific jobs and job duties. The suggested considerations below should be explored in regard to any potential teleworking position:

Job Knowledge: Does the employee have the necessary knowledge to perform the required job tasks at home, or does the employee need close supervision or input from others that is only available at the central office?

Public/Agency Contacts: What portion of the job is devoted to face-to-face contact with other agencies, the public or internal agency staff?

Can this contact be structured to allow for communication via phone or computer, or grouped into non-telework days, or can alternatives be established to provide this contact on teleworking days?

Reference Materials: What portion of the job requires the use of reference materials or resources located in the central office? Can these resources be easily taken home for a day or two without interfering with the job performance of coworkers? Are these resources available through other means such as a computer accessible library service or a community or university library?

Use of Computers: Will response time on computer equipment used at home be fast enough to allow for required productivity? If mainframe computer and/or network access is needed, does the correct “dial-up” capability exist? If long-distance “dial-up” is necessary, is the cost prohibitive? If connection to a Local Area Network (LAN) at the central work place is required, are the necessary hardware components in place?

Special Equipment: What portion of the job relies upon access to photocopiers, fax capabilities or other specialized equipment?

Can access needs be managed to allow them to be met on non-telework days or can these needs be serviced by a facility near the employee’s telework office?

Information Security: What portion of the job uses secured or otherwise confidential information?

Can the integrity of that information be secured in accordance with information security policies if it is taken or accessed from off site?

Task Scheduling: Can tasks, which can be completed away from the central office, be grouped and scheduled for teleworking days?

Can staff meetings and conferences be grouped and scheduled for non-telework days or accommodated with teleconferencing?

Travel: Does the job involve fieldwork?

Can trips begin or end at the employee’s telework office rather than at the central office?

Can paperwork be done away from the central office?

Employee Work-related Characteristics: Is the employee experienced and knowledgeable in their job duties? Is the employee motivated and self-directed? Does the employee demonstrate an ability to independently establish priorities and manage their time effectively? Does the employee conscientiously pursue high-quality work?

The opportunity to participate in a home telework program is offered with the understanding that:

1. The teleworker is responsible for establishing and maintaining an acceptable home office environment, as outlined in “Setting Up A Home Office,” see Attachment C, and as indicated in the Telework Program Policy and Procedures.
2. The teleworker is responsible for designating an area that allows them to work in an office setting.

The equipment necessary to perform the work must be in the designated area. The necessary equipment can range from a working surface (desk or table), paper, pencil to a residential telephone line, computer, printer, fax, and dedicated telephone line, depending on telework tasks.

3. The teleworker is responsible for arranging household responsibilities to avoid interference with work time.
 - a) The teleworker must have dependent care arrangements to ensure they have a productive work environment.
 - b) Telework is not intended to be a substitute for day care. However, there may be situations or occasions when minimal care is necessary and will not interfere with work responsibilities.
 - c) Use of vacation time or sick leave to attend to family or home matters during home office hours must be pre-approved by the teleworker’s supervisor.
4. The teleworker is responsible for ensuring their home office is a safe place to work.

Observe the “travel patterns” in and around the work area. Select a location that is safe, efficient, and comfortable. When designing a home office, the main considerations should be:

The Desk

Conventional desk surfaces are usually 29 inches high, but you should choose whatever height feels most comfortable. The recommended height for computing surfaces is 26 inches. The desk should be sturdy enough to handle the weight of any peripheral equipment, such as computers, printers, fax machines, telephones, etc.

The Chair

The seat should be adjustable. The height of the top surface of the seat to the floor should be 15 - 21 inches. Both the height and the angle of the backrest should be adjustable. It should provide support to the back of the waist. Remember, you may be sitting in the chair all day.

The Lighting

Whether you use natural or artificial lighting, it should be directed toward the side, or behind the line of vision, not in front or above it. Bright light sources can bounce off working surfaces and diminish the sense of contrast. Northern daylight is optimal for both the office and operating a computer.

Electricity

1. Cover interconnecting cables or place them out of the way to avoid tripping over them.
2. Position equipment close to electrical outlets. Connect equipment such as computers, printers, and fax machines to a surge protector/master switch.

3. Provide sufficient air space around electronic components.
4. Keep equipment out of direct sunlight and away from heaters.
5. Place heavy items on sturdy stands close to walls.
6. Make sure electrical outlets are grounded. There should be enough electrical outlets in the room. You may need a separate circuit to avoid overloading the existing electrical system. If necessary, consult your local power utility.

Noise

Surprisingly, no noise can be just as stressful as too much noise in the work environment. Background sound, like music turned low, can keep your productivity up and help reduce boredom. However, be sure to keep distracting sounds such as crying children, the television, outside noises like traffic, or lawn mowers to a minimum. Use a room divider or screen, or simply shut the door or window to diffuse noise.

Protecting Data and Equipment

The following computer safeguards can prevent costly computer breakdowns and the loss of crucial data:

1. Position equipment away from direct sunlight or heat.
2. Place equipment on well-ventilated surfaces.
3. Use dust covers.
4. Dust the office space regularly.
5. Do not eat or drink near valuable equipment.
6. Never place even temporarily, food or beverages on your computer.
7. Do not touch unprotected floppy diskette surfaces.

8. Keep diskettes away from heat, dirt, smoke, and moisture.
 9. Do not place heavy objects, like books, on diskettes.
 10. Keep all magnets, magnetic paper clip holders, telephones, fluorescent lamps, and electric motors away from computer equipment and floppy diskettes.
- b) The detector must be approved by Underwriter's Laboratory (UL) and/or the State Fire Marshall, with a function test mechanism.
 - c) Detectors should be tested at the time of installation and on a monthly basis. Detectors which are wired into the house electrical system, and have a battery backup, should be checked with main power both on and off. Battery operated detectors should be cleaned and equipped with fresh batteries as recommended by the manufacturer.

Safety

The Occupational Safety and Health Administration recommends the following to reduce work related injuries:

1. Minimum wrist deviation, using the "straight hand-forearm" method for typing.
2. A 15-degree back tilt on chair/lumbar support and footrest.
3. Video display terminal anti-glare/contrast adjustment.
4. Adequate training and education in stretching exercises.

Fire Protection

1. The Health and Safety Code, Sections 13113.7 and 13113.8 require that dwellings be provided with smoke detectors. Smoke detectors placed in the work area shall meet the following criteria:
 - a) The detector must be placed in a location which monitors the work area and any electronic equipment used to support teleworking.

The following checklist must be completed prior to the beginning of home teleworking. All items shall be installed and maintained in accordance with "Setting Up a Home Office," see Attachment C.

	YES	NO	COMMENTS
I. Electrical			
A. Electrical outlets in the work area are permanent in nature, and properly grounded.	<input type="checkbox"/>	<input type="checkbox"/>	_____
B. There are an adequate number of electrical outlets to support equipment in the work area.	<input type="checkbox"/>	<input type="checkbox"/>	_____
C. Electrical cords are not frayed or otherwise damaged.	<input type="checkbox"/>	<input type="checkbox"/>	_____
D. Extension cords are not being used as a permanent source of electricity.	<input type="checkbox"/>	<input type="checkbox"/>	_____
E. Electrical equipment and tools are properly maintained.	<input type="checkbox"/>	<input type="checkbox"/>	_____
F. I have surge protection for computers, peripheral equipment and fax machines to guard against damage from power surges.	<input type="checkbox"/>	<input type="checkbox"/>	_____
G. There is sufficient ventilation space for electrical components.	<input type="checkbox"/>	<input type="checkbox"/>	_____
II. Fire Protection			
A. Smoke Detector (UL Approved)			
1. I understand the smoke detector should be tested at the time of installation and will perform monthly tests as directed by the equipment manufacturer.	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Smoke detector is employee-owned. If "yes," skip the next question.	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Smoke detector is CalPERS-provided. If "yes," answer the following:	<input type="checkbox"/>	<input type="checkbox"/>	_____
a) Issue date: _____			
4. Next scheduled service date to check batteries (within 6 months of installation date): _____			_____
B. Fire Extinguisher—2A10BC Rating			
1. I have clear access to a fire extinguisher.	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Fire extinguisher is employee-owned. If "yes," answer the following:	<input type="checkbox"/>	<input type="checkbox"/>	_____
a) Next scheduled service date (up to one year after installation date): _____			_____

	YES	NO	COMMENTS
3. Fire extinguisher is CalPERS-provided. If "yes," answer the following:	<input type="checkbox"/>	<input type="checkbox"/>	_____
a) Issue date: _____			_____
b) Next scheduled date to return fire extinguisher for service (up to one year after issue date): _____			_____

III. Emergency Procedures

A. Pre-established evacuation plans.	<input type="checkbox"/>	<input type="checkbox"/>	_____
B. There is more than one way out of the work area (e.g. doors and/or windows).	<input type="checkbox"/>	<input type="checkbox"/>	_____
C. First aid supplies (Typically includes: antimicrobial skin cleansers, hydrogen peroxide, alcohol preparation wipes, scissors, tweezers, eye clean solution, antibiotic ointment, ice pack, white gauze, triangular bandage, medical tape, adhesive, and non-adhering dressings, and an Ace bandage).	<input type="checkbox"/>	<input type="checkbox"/>	_____

IV. Environment

A. The work area is uncluttered and free of tripping hazards.	<input type="checkbox"/>	<input type="checkbox"/>	_____
B. Equipment is adequately supported and free from the danger of falling.	<input type="checkbox"/>	<input type="checkbox"/>	_____
C. The work area has adequate lighting.	<input type="checkbox"/>	<input type="checkbox"/>	_____
D. Potentially hazardous chemicals are not stored in or around the work area.	<input type="checkbox"/>	<input type="checkbox"/>	_____
E. I would like to request a safety inspection.	<input type="checkbox"/>	<input type="checkbox"/>	_____

V. Workstation Arrangement

If you will NOT be using computer equipment, skip this section and explain in the "Comments" column.

A. Positioning

1. Are your forearms and wrists parallel to the floor and upper arms resting at your sides when positioned at the keyboard or the work surface?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Are your thighs parallel to the floor?	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Are your feet supported?	<input type="checkbox"/>	<input type="checkbox"/>	_____

	YES	NO	COMMENTS
4. Is there at least 2 inches of clearance between your thighs and the working surface?	<input type="checkbox"/>	<input type="checkbox"/>	_____
5. Is there approximately the size of a fist between the edge of the seatpan and the back of your knees?	<input type="checkbox"/>	<input type="checkbox"/>	_____
6. Are your wrists in a straight and neutral position?	<input type="checkbox"/>	<input type="checkbox"/>	_____
7. Is the top of the viewing screen at a comfortable height (i.e. no tilting of the head back or downward)?	<input type="checkbox"/>	<input type="checkbox"/>	_____
8. Is the screen at a comfortable distance from your eyes when in use (i.e. you do not have to lean forward or backward to see the print on the screen)?	<input type="checkbox"/>	<input type="checkbox"/>	_____
9. Does your head and neck rest in a neutral position (i.e. facing forward, chin slightly down, shoulders relaxed)?	<input type="checkbox"/>	<input type="checkbox"/>	_____

B. Chair Adjustment

1. Is the height of the chair adjusted to allow you to sit in a neutral position? (Sitting in a “neutral position” typically refers to the following: forearms and thighs are parallel to the floor, wrists are straight, upper arms are vertical with elbows hanging at sides, hips rest comfortably in seatpan, feet rest comfortably on floor or footrest, lower leg and feet slightly are in front of knee (not behind or on chair leg).	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Is the backrest of your chair supporting the curve of your lower back so that your spine is slightly arched?	<input type="checkbox"/>	<input type="checkbox"/>	_____

C. Footrest

1. Are your feet comfortably flat on the floor or a footrest?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. If a footrest is used, does it allow you to sit in a correct, neutral position at your workstation?	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. Is the footrest non-restrictive to allow movement and easily removable?	<input type="checkbox"/>	<input type="checkbox"/>	_____

	YES	NO	COMMENTS
D. VDT Screen/Monitor			
1. Is there glare on your VDT screen from any light sources (i.e. outside, overhead, other)? If YES evaluate items 2–5.	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Does your monitor directly face an outside light source such as a window?	<input type="checkbox"/>	<input type="checkbox"/>	_____
3. If located near a window, are there adjustable window treatments on the windows, and are those window treatments properly used to minimize glare?	<input type="checkbox"/>	<input type="checkbox"/>	_____
4. Has the screen angle and/or brightness and contrast controls been adjusted to reduce glare?	<input type="checkbox"/>	<input type="checkbox"/>	_____
5. Are there any fluorescent lights directly overhead or behind your monitor contributing to the glare?	<input type="checkbox"/>	<input type="checkbox"/>	_____
6. Is your VDT screen cleaned frequently to eliminate smudges and dust covering?	<input type="checkbox"/>	<input type="checkbox"/>	_____
7. Is the VDT screen adjusted for good image contrast and brightness?	<input type="checkbox"/>	<input type="checkbox"/>	_____

E. Workspace Arrangement

Materials and equipment accessed and/or used frequently typically are positioned/placed in the *Primary Zone* (within 16” of comfortable reach). Materials and equipment accessed and/or used less frequently are typically positioned/placed in the *Secondary Zone* (within 16–24” of reach). Infrequently accessed references and resources are typically beyond comfortable reach.

1. Are materials and equipment positioned/placed in appropriate zones according to:			
• Frequency of use?	<input type="checkbox"/>	<input type="checkbox"/>	_____
• Task of use?	<input type="checkbox"/>	<input type="checkbox"/>	_____
• Relation to other tasks?	<input type="checkbox"/>	<input type="checkbox"/>	_____
• Physical demands?	<input type="checkbox"/>	<input type="checkbox"/>	_____
2. Frequently used material/equipment positioned so harmful postures and motions are eliminated?	<input type="checkbox"/>	<input type="checkbox"/>	_____

Name and Location of Employee and Supervisor

Name of Teleworker: _____
Division: _____ Office Phone: (_____) _____
Residence Address: _____
Residence Phone: (_____) _____ Pager: (_____) _____
Cellular Phone: (_____) _____
Telework Office Phone: (_____) _____ Telework Office Fax Number: (_____) _____
Name of Supervisor: _____ Supervisor's Phone: (_____) _____
Central Office Address: HQ Area or Field Office/Other: _____
Telework Areas—Identify the area(s) in your home where you will telework: _____

Telework days are to be scheduled in advance and must be approved by the supervisor. Any change in the agreed upon schedule must be approved by the supervisor, and when permanent, documented and appended to the Telework Plan. Indicate the type of telework schedule in which you wish to participate (see the CalPERS Telework Program Policy and Procedures for a definition of these schedules): Regular Casual Full-time

If applicable, indicate proposed beginning and ending dates of temporary telework arrangement: _____
Telework days will typically be on: _____

Telework Hours: Specify the hours you plan to telework. You may specify a reasonable "band" of time to provide flexibility. (Example: If you wish to work your telework day during the hours of 6 AM and 7 PM, you would specify 6:00 AM to 7:00 PM) Employees covered by the Fair Labor Standards Act (work week group 2), are not authorized to work more than a total of eight hours per day, or 9 hours if on a 9/8/80 alternate work schedule, unless additional hours of work are pre-approved by the supervisor.

Teleworker will be available for communication on telework days between the hours of: _____ a.m./p.m. to _____ a.m./p.m.
On a typical telework day, work will be performed between the hours of: _____ a.m./p.m. to _____ a.m./p.m.

- This arrangement must be reviewed and renewed at least annually to ensure the guidelines for participating in the program are being followed and that all information remains current.
• Use of annual leave, vacation, CTO, other leave credits or overtime to be worked must be approved in advance by the Supervisor. Use of sick leave shall be used in accordance with the employee's collective bargaining agreement.
• Telework is not a substitute for dependent care, and the teleworker should make arrangements for appropriate dependent care, if necessary.
• It is understood that, at certain times, it may be necessary for the telework schedule to be revised in order to ensure critical deadlines are met or to attend meetings.

I have read and understand the CalPERS Telework Program Policy and Procedures and related instructions. I understand that I must abide by those instructions and procedures to participate in the telework work option.

Teleworker _____ Date _____ Supervisor _____ Date _____ Division Chief _____ Date _____

Name of Employee

Date

The following tasks must be completed before the employee begins teleworking.

- The employee and supervisor have read the CalPERS' Telework Program Policy and Procedures.
- Employee and Supervisor have attended formal telework training.
- Equipment issued by CalPERS is documented. Requirements for care of equipment assigned to the employee have been discussed and are clearly understood; the employee assumes responsibility for the equipment as specified in the CalPERS Telework Program Policy and Procedures.
- Performance expectations have been discussed and are clearly understood.
- Requirements for adequate and safe office space have been met in accordance with the provisions in the Telework Program Policy and Procedures and related instructions. The arrangements for the workspace have been discussed with the employee.
- The employee is familiar with requirements pertaining to the security and confidentiality of data and information.
- Teleworker phone contact procedures have been clearly defined and appropriate unit staff and receptionists have received instructions.
- If information technology equipment and/or services are approved, ITSD forms, ITS-037, and the Telework Needs Assessment must be completed and submitted to the Telework Program Coordinator in the Human Resources Division. (ITSD will not approve equipment or services without the Telework Program Coordinator's signature.)
- If telecommunications equipment and/or services are approved, an OSSD form, OSS-067, must be completed and submitted to the Telework Program Coordinator in the Human Resources Division. (OSSD will not approve equipment or services without the Telework Program Coordinator's signature.)
- The employee and supervisor have read, understood, and signed the Telework Plan prior to actual participation in the program.
- The employee has read, understood, and signed the Safety Checklist prior to actual participation in the program.

Glossary of Terms

The following terms are defined to assist you in your participation in the Telework Program. Not all of these terms appear in the body of the policy.

Alternative Officing is office planning and design approaches outside conventional standards that focus on the workplace as a process-supporting, humanistic, functional tool.

Central Office is the CalPERS location to which an employee is assigned.

Day Care is care giving for infants, toddlers, preschoolers, school-aged children, adults, and elderly adults who require constant supervision.

Dial-Up Networking is a feature of the Microsoft Windows operating system that allows a computer's modem to connect to a remote site by connecting to a specially configured remote computer.

File Transfer is the process of copying or moving a file or group of files from one location to another. Typically, a Teleworker will dial-in to the CalPERS LAN in order to transfer work files from a server on the LAN to their computer and then work on those files off-line. Any subsequent updates or revisions can then be transferred back to the server during another on-line session.

Gross Negligence is the deliberate inattention and failure to exercise the care that a prudent person usually exercises and the reckless disregard of the consequences affecting the life or property of another.

Home Office is an area(s) designated within the home for the purpose of performing CalPERS work.

Local Area Network (LAN) A group of computers and peripheral equipment (such as printers, scanners, etc.) connected by a communications link that enables any device to interact with any other device on the network.

ReachOut® ReachOut remote access software allows teleworkers to take remote control of a specially designated host computer as if they were actually working at that computer. Once the ReachOut Viewer software is installed and configured on the remote site computer, the Teleworker uses the modem and phone line to dial-in to the ReachOut host. Access to the standard suite of CalPERS applications as well as e-mail and scheduling are all available on the ReachOut host.

Remote Access is the connection of a personal computer from an off-site location to the CalPERS LAN, usually through the use of a modem and telephone line (see "Dial-up Networking"). Two methods of remote access are currently in use at CalPERS, the Remote Access Server (RAS) and ReachOut. The method of remote access is usually determined by the Information Technology Services Division, Personal Computer Services Analyst based on the Teleworker's needs and the equipment available to the Teleworker.

Remote Access Server (RAS) is a feature of Microsoft Windows 95 and Windows NT which allows a remote computer to connect directly to the CalPERS LAN using a modem and phone line. The remote computer is attached directly to the network via the Remote Access Server; this is one of the main distinctions between this type of connection and ReachOut, where the computer takes remote control of a specially configured host computer.

Security Token is a means of preventing unauthorized access to the CalPERS LAN. Teleworkers may be issued a "hard" token, which looks like a small hand-held calculator. The token is used to decode an eight-character "challenge" issued by the network security server. The teleworker types in the decoded "response" in order to gain entrance to the LAN. In some cases, a software-based or "soft"

token can be installed on a computer which eliminates the need to carry the hard token. Multiple incorrect responses will invalidate the soft token and make it unusable. This requires a new token to be generated and installed.

Tele means distant, or at a distance.

Telecommunications means communications at a distance (as by telephone).

Telecommute means to work at home by the use of an electronic linkup with a central office.

Telecommuter is an employee who telecommutes, typically at least one day per week.

Telecommuting is moving the work to the workers instead of moving the workers to work; periodic work away from the central office, one or more days per week either at home or in a telework center. More formally, it is the partial substitution of telecommunications technologies, possibly with the aid of computers, for the commute to work.

Teleconferencing means holding of a conference among people remote from one another by means of telecommunication devices (e.g. telephones or computer terminals).

Telework is an off-site arrangement permitting employees to work in or near their homes, or an alternate worksite, for all or part of the workweek. *Telework* is an umbrella concept encompassing the terms *telecommuting*, *teleconferencing*, and *videoconferencing*, and is closely related to *alternative officing* and the *virtual office*.

Telework Schedules

Casual: A telework arrangement which is temporary or limited due to reasons such as:

- during convalescence from injury or illness
- while a family member is recovering and needs in-home assistance
- during the last few weeks of pregnancy, and/or following the birth of a child
- while all reasonable commute routes are blocked (i.e., major construction, storm, or disaster)
- if primary worksite is inaccessible or uninhabitable
- if special project work requires an extended period of uninterrupted time

Regular: An established telework schedule of days per week or month.

Full-time: A telework arrangement that is permissible only when necessary and justified, (e.g., to accommodate medical restrictions or physical disabilities) and depends on the needs of the job.

Teleworker is an employee who teleworks.

Videoconferencing means holding a conference among people at remote locations by means of transmitted audio and video signals.

Virtual Office is a technology-based option for doing work anywhere away from the central office.



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