

Virtual Office Policy

Agency-wide Procedures for Administration

Procedures Number DOR-1080-010C-1

Provide the Title and Link to the Associated Policy:

[Virtual Office Policy](#)

Effective Date: 09/08/10

Purpose - Revenue's Virtual Office Policy is designed to provide policy and procedural guidance to Revenue employees who perform job duties at alternative work sites and their supervisors. The *Virtual Office Policy Procedures for Administration* show the actions required to administer the Alternate Work Program. They are primarily for program directors, process managers, regional managers, service center managers, office directors, alternate work program coordinators, the Information Services Program, site-level technical support staff and other responsible parties.

Procedures for Administration

Evaluating Positions' Eligibility

The Office of Workforce Management will provide direction for the annual update of positions job classifications that are appropriate for participation in Revenue's Virtual Office Policy, as required by law. The Office of Workforce Management will work with alternate work program coordinators to assist service center managers, process managers and office directors in updating all service center, process and executive office positions and job classifications. This list will be sent to each alternate work program coordinator no later than June 30 of each year.

Service center managers, process managers and office directors should update position eligibility with:

- Positions for which the current employee and his or her supervisor have completed a new [Virtual Office Agreement](#) in the current fiscal year.
- Positions for which the current employee and his or her supervisor have renewed a *Virtual Office Agreement* in the current fiscal year, unless the length of the original participation agreement is less than a year, or unless having renewal discussions at the same time as employee performance reviews is otherwise impractical.
- Positions for which employees have submitted a *Position Ineligibility Appeal Form* in the current fiscal year.

Service center managers, process managers and office directors should use [Revenue's Guidelines for Evaluating Position Eligibility](#) to update their list of positions and job classifications that are appropriate for participation in the Virtual Office Policy.

- Beginning June 30, 2011, any position or job classification ineligible for Revenue's Virtual Office Policy will be accompanied by an explanation why its inclusion would have an adverse agency impact, as defined in this policy. *Contact the Alternate Work Program Coordinator for help, if needed.*

Direction and Administration of the Alternate Work Program

Program directors will make sure their program's administration of the Alternate Work Program is consistent and follows governing statutes and Revenue policies.

Program directors will appoint an alternate work program coordinator, who will:

- Act as a resource for their program's participants, supervisors and program director.
- Facilitate internal program communication related to alternative work arrangements and strategies.
- Coordinate program administration of the Alternate Work Program.
- Perform other duties as assigned by the program director. This may include delegation of Virtual Office Agreement approval authority.

Program directors may assign other duties and/or staff to effectively administer the Alternate Work Program in their program, as needed. Examples include:

- Delegating approval authority for Virtual Office Agreements.
- Assigning staff to input and maintain data in the Alternate Work Program database.
- Assigning staff to perform other duties required by the Virtual Office Policy and its procedures.

Program directors will be responsible for annually reporting measurable financial benefits related to reduced office space requirements, reduced energy consumption, and reduced greenhouse gas emissions resulting from telework, as required by [Section 110.171, Florida Statutes](#). *Reporting can be done at the same time as other agency strategic processes, such as the Capital Improvement Plan, Long Range Program Plan, Legislative Budget Requests and others.*

Program directors will determine how alternative work arrangements can be used strategically to maximize benefits to Revenue and meet the program's strategic goals and business needs. They will assess both financial and non-financial benefits of alternative work arrangements. Where possible, they should use alternative work opportunities for positions and personnel where multiple benefits can be achieved simultaneously. Benefits include, but are not limited to:

- Reduced costs, including reduced leased space needs.
- Improved employee performance and productivity.
- Improved employee work/life balance.
- Enhanced employee recruiting and retention.
- Improved Continuity of Operations capabilities.

- Compliance with executive or legislative mandates (like the *Americans with Disabilities Act* or the Governor's Executive Order on Greenhouse Gas Emission Reduction).
- Combining alternative work opportunities with other Revenue improvement efforts to maximize benefits and realize economies of scale.

Program Directors will be responsible for assessing the benefits of planning for and equipping a virtual workforce. Considerations include:

- Strategic, enterprise-wide planning for technology purchases that improve information technology throughout the agency.
- Budget allocations to proactively plan for acquisition of remote access technology.
- Purchasing laptops and telework peripheral equipment in refresh cycles.
- Hoteling employees to maximize the use of workstations, equipment, furnishings and related supplies to reduce future purchasing needs.

Other benefits include:

- Improved contingency support.
- Increased organizational flexibility and adaptability to changes in information technology needs.
- Easier to use applications with a common interface.

The Alternate Work Program as a Way to Reduce Leased Space Costs

Regional managers, process managers and service center managers will assess the benefits of using alternative work sites, alternative work schedules and hoteling to reduce leased space costs and maximize facility and equipment usage. Their program's alternate work program coordinator will facilitate the assessment.

Considerations include:

- The potential for sustainable supervisor and employee virtual office agreements, which are voluntary under the law. [Section 110.171\(3\)\(c\), Florida Statutes](#) states *"that participation by an employee in a telecommuting program is voluntary, and the employee may elect to cease to participate in a telecommuting program at any time."*
- The possibility of a site plan.
- The combination of alternative work schedules and telework to hotel employees, like the use of non-dedicated, non-permanent workspace assigned by reservation or on an as-needed basis when working at the official work site.
- The use of variable flextime work schedules to reduce teleworkers' footprint on Revenue's virtual private network during peak working hours. *Remote access users have less competition for virtual private network space (for example, fewer time-outs) outside of peak working hours and before 10 p.m., Monday through Friday.*
- Pools of non-dedicated laptop computers, cell phones or voice and data communication devices for use by reservation or on an as-needed basis by teleworkers.

Alternate Work Program Coordinators' Procedures and Responsibilities

Each alternate work program coordinator will facilitate internal program communication related to alternative work strategies that can help meet program needs and maximize benefits to Revenue. They will perform other duties assigned by their program director.

Alternate work program coordinators act as a resource for information and procedural inquiries for their program's participants, supervisors and program director. *They can ask the Alternate Work Agency Coordinator for help, if needed.* Alternate work program coordinators serve as the first point of contact for supervisors of Alternate Work Program participants. They:

- Educate program staff about Alternate Work Program policies and procedures.
- Work with supervisors to determine if the equipment and resources needed for an employee to work at an alternative work site are available and whether the cost is within the priorities set by the program director.
- Work with the supervisor and the Information Services Program Telecommunications Section to get cost-effective telecommunications equipment and service for alternative work sites.
- Identify alternate work site champions at each program site with multiple virtual office participants. Coach and develop these site champions to act as their site's primary resource for non-technical information and procedural inquiries. *Alternate work program coordinators will be their program's primary resource during implementation of the Alternate Work Program. They coach and develop site-level personnel to assume those roles.*

Each alternate work program coordinator will coordinate their program's administration of the Alternate Work Program. They will:

- Facilitate the annual identification and maintenance of Revenue's list of eligible positions and job classifications, which is required by law. They will make sure that position eligibility tables for all positions in Revenue's Alternate Work Program database are annually updated no later than September 1 of each year.
- Coordinate Virtual Office procedures for participation approval, renewal, denial and termination. They will:
 1. Make sure the Virtual Office approval process takes no longer than 60 days from submission of the Virtual Office Agreement.
 2. Forward forms through program delegated authorities.
 3. Review correspondence sent to the program director, or designee, for approval, renewal, denial or termination.
 - a. If the program director denies or terminates an individual's participation, they will complete the form.

- b. If the program director terminates an employee's participation, they will notify program staff responsible for provision of agency equipment and resources used to perform work at alternative work sites.
 - 4. Notify employees and their supervisors about program director's approval, renewal, denial or termination of participation.
 - 5. Immediately notify the Alternate Work Agency Coordinator of any status changes and make sure the changes are recorded in Revenue's Alternate Work Program database.
- Make sure records are kept and updated. They will forward original documents to the Office of Workforce Management and keep electronic files on program participants and make sure program information in Revenue's Alternate Work Program database is entered and maintained timely.

Appointment of the Alternate Work Agency Coordinator

The Director of the Office of Workforce Management will appoint the Alternate Work Agency Coordinator, who will:

- Act as Revenue's telework resource.
- Facilitate inter-program communication related to alternative work arrangements and strategies.
- Coordinate agency administration of the Alternate Work Program.
- Perform other duties as assigned by the Director of Workforce Management.

Procedures and Responsibilities of the Alternate Work Program Advisory Council

Each alternate work program coordinator and a representative from the Information Services Program Infrastructure Process will serve on the Alternate Work Program Advisory Council, which will be chaired by the Alternate Work Agency Coordinator. The council works together to:

- Answer questions about the Alternate Work Program and explain policy and procedures.
- Consult with subject matter experts in Revenue.
- Identify Alternate Work Program implementation issues, work to resolve them, and communicate solutions.
 - If the Alternate Work Program Advisory Council cannot collectively resolve questions about the Alternate Work Program or interpret its policies and procedures, the Alternate Work Agency Coordinator will have the authority to issue final interpretations and resolutions.
- Develop or change procedures.
- Update Alternate Work Program forms and documents, as needed.
- Develop recommendations for the Strategic Leadership Board to add to or change this policy.

- Measure the success of the Alternate Work Program. Gather and report statistics about program administration. The statistics should include, but are not limited to:
 - The number and percentage of eligible positions.
 - The number and percentage of participants.
 - The number of denied requests for participation.
 - The number of program-terminated *Virtual Office Agreements*.
 - Denial and termination reasons.
 - Leased space cost reductions.
 - Participant productivity and sick leave usage.
 - Costs associated with equipping and supplying alternative work sites.
 - Commuting mileage and greenhouse gas emissions saved by program participation.
 - Worker's compensation claims originating from alternative work sites.
 - Security incidents originating from alternative work sites.

Alternate Work Agency Coordinator's Procedures and Responsibilities

The Alternate Work Agency Coordinator will act as Revenue's telework resource. He or she will serve as the first point of contact for alternate work program coordinators, senior management and external business partners.

He or she will educate agency staff about Alternate Work Program policies and procedures and make sure training materials and communications are developed and deployed.

If needed, the Alternate Work Agency Coordinator will represent Revenue's Alternate Work Program to external business partners, including other agency telecommuting coordinators and the State Telecommuting Coordinator.

The Alternate Work Agency Coordinator will coordinate Revenue's administration of the Alternate Work Program. He or she will:

- Work with the alternate work program coordinators to coordinate the annual identification and maintenance of eligible positions and job classifications, as required by law.
- Evaluate statutory compliance.
- Make sure statistics showing workers' compensation claims originating from alternative work sites are collected.
- Make sure statistics showing security incidents originating from alternative work sites are collected.
- Report statistics at least annually to the executive director, director of Workforce Management, program directors, other senior management and the Department of Management Services.
- Work with teams to post the following items on Revenue's Internet site, as required by law:
 - The list of eligible positions and job classifications.

- The Virtual Office Policy and procedures.
- Virtual Office Policy forms.
- *The Alternative Work Site Safety Checklist.*
- Frequently Asked Questions.
- Other supporting documents.
- Make sure records are kept and updated.
- Make sure the agency's time-keeping system (PeopleFirst) is updated for Virtual Office Policy participants classified as "primary work-at-home" and "part-time work-at-home."

Responsibilities of the Information Services Program

The Information Services Program will develop and maintain the Alternate Work Program database. It will:

- Serve the data needs of Alternate Work Program administration, the Office of Information Security Management and the Information Services Program Communications Section.
- Provide a data repository of Alternate Work Program participant information.
- Provide a data repository for eligible Revenue position and job classification information.
- Update timely cost information related to resources and services provided by the Information Services Program.

The Information Services Program's Communications Section will serve as the first point of contact for alternate work program coordinators and supervisors when they have questions about telecommunications equipment and service. The Communications Section will take action on requests for service within five days and issue a Communication Services Agreement (CSA) based on the *Telecommuter Voice and Data Specifications Template*.

The Information Services Program Communications Section will also make sure the telephone company completes all work satisfactorily.

Site-level Technical Support and Equipment Set-up

Site-level technical support will staff set up and configure computer equipment for use at alternative work sites. They:

1. Install software based on the user's needs as would be done for main office computers.
2. Install Safeboot.
3. Configure for automatic updates.
4. Configure the personal firewall so that it can't be turned off.
5. Make sure McAfee anti-virus and anti-spyware software are installed. Enable signature configurations update.
6. Test for working order with the network. Make sure the firewall, McAfee, and other configurations are working properly.

Site-level technical support staff will provide ongoing technical support for site users as is currently provided.

- If requested, technical support staff may guide remote users with personal routers through configurations to prevent unauthorized interception of data transmissions. However, the employee is ultimately responsible for router configuration and all technical support of personally-owned equipment.
- If requested, provide guidance for the transmission and receipt of digital photographs or video that may be used to document that the alternative work site is free of safety hazards and to verify Revenue equipment for property inventory purposes.

Alternate Work Program Site Champions

Alternate work program site champions act as a resource for information and procedural inquiries for their site's participants and supervisors. They will ask their alternate work program coordinator for help, if needed.

DEFINITIONS

Definitions for terms used in these procedures are in the [Virtual Office Policy](#).

AUTHORITY/REFERENCES

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

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

[Section 110.171, Florida Statutes](#), also known as the *State of Florida Telecommuting Act*, authorizes telecommuting. Some of its provisions require state agencies to:

- Identify and maintain a current listing of the job classifications and positions that the agency considers suitable for telecommuting.
- Provide that an employees' participation in the telecommuting program be voluntary and not adversely affect eligibility for advancement or any other employment rights or benefits.
- Give equal consideration to career service and exempt positions in the selection of participating employees.

[Chapter 2008-227, Laws of Florida](#) amended the *State of Florida Telecommuting Act*. Some of its provisions require state agencies to:

- Post the telecommuting program and supporting documents on the agency's website allowing employees and the public access to the information.

- Provide measurable financial benefits related to reduced office space requirements, reduced energy use, and reduced greenhouse gas emissions resulting from telecommuting.

[Department of Management Services \(DMS\) Telecommuting Guide](#) was created to help managers and employees considering telework.

Department of Revenue Information Security Policy, #DOR-SEC-004 defines Revenue's security framework to assist personnel in the implementation of policies, procedures and standards for Revenue's Information Security Program.

COMMUNICATION and TRAINING

Communications and training for these procedures are in the [Virtual Office Policy](#).

KEY AGENCY CONTACT –

Key agency contacts for these procedures are the alternate work program coordinators for each Revenue program and the Alternate Work Agency Coordinator. If you have questions about these procedures, please contact your alternate work program coordinator or e-mail Workforce Management@dor.state.fl.us.

REVISION HISTORY TABLE –

Origination Date	Explanation
August 1991	State Employee Telecommuting Pilot Program
Last Reviewed Date	Explanation
May 1995	Revenue Telecommuting Program Operating Procedures
October 1997	Revised Telecommuting Program Operating Procedures
November 2003	Revenue Telecommuting Policy and Operating Procedures
	<ul style="list-style-type: none"> • Information Security Program’s Telecommunications’ Section responsible for <ul style="list-style-type: none"> ○ Serving as initial point of contact for telework equipment and service questions. ○ Development and maintenance of agency-wide job classification/position eligibility list, the Telecommuter Information Database and the Telecommuting Model Office Template. • Established Telecommuting representatives in each program. • Revised telecommuting approval authorities to include service center managers and regional managers. • Updated and revised forms.
September 2010	Revenue’s Virtual Office Policy Agency-wide Procedures for Administration
	<ul style="list-style-type: none"> • Provides procedural guidance for parties responsible for administration of the Virtual Office Policy.