

**ENCLOSURE C**

**Checklist for Determining Eligibility for Telework**

Employee Name: \_\_\_\_\_

Employee Phone: \_\_\_\_\_ Employee Email: \_\_\_\_\_

Position Title: \_\_\_\_\_

Series: \_\_\_\_\_ Grade: \_\_\_\_\_ PD#: \_\_\_\_\_

Position Office Symbol: \_\_\_\_\_

Supervisor Name: \_\_\_\_\_

Supervisor Phone: \_\_\_\_\_ Supervisor Email: \_\_\_\_\_

Date: \_\_\_\_\_

- |  |     |    |
|--|-----|----|
| 1. Is this employee serving in a probationary period?      | YES | NO |
| 2. Does this employee occupy a trainee or intern position? | YES | NO |

Generally, an employee who is serving a probationary period or occupying a trainee or intern position is not eligible to participate in telework. The length of time these employees are ineligible for telework is at the command's discretion.

Regular/recurring telework – arrangement in which some or all duties may be performed at an alternative worksite, on a regular and recurring basis. Regular/recurring telework is when an employee performs duties at an alternative worksite on a set schedule (e.g., every Monday; once a pay period; once a month).

Situational telework – arrangement in which duties may be performed at an alternative worksite on a case-by-case basis (e.g., COOP, inclement weather, special project), where the hours worked are not part of a previously approved, ongoing, and regular telework schedule.

Note: Medical telework is to assist employees who have temporary or continuing health problems. This type of telework arrangement may occur on a situational/irregular basis, or as a regular and recurring arrangement. An appropriate medical certification will accompany any request for this type of telework.

**POSITION ELIGIBILITY CRITERIA**

Position eligibility evaluation should be based on the **position duties** rather than the job title, series, grade, type of appointment, work schedule or incumbent. (Factors to consider for employee eligibility are addressed later in the form.)

Base the determination on the **current duties of the position**. This determination may change if the duties change (e.g., mission, special projects, details).

If a position is not fully eligible, consider if a portion of the position’s tasks can be performed via telework on a limited basis. Workload management and adjustment may play a part in your assessment. In some cases, it may be possible to restructure position duties to allow for telework on a situational basis.

<b>QUESTIONS</b>	<b>YES</b>	<b>NO</b>
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1. Does the position require incumbent to report <b>daily (i.e., every day)</b> to the traditional worksite?		
2. Does the position require continuous on-the-job training or close supervision?		
3. Does the position require <b>daily</b> use of special facilities or equipment that the organization cannot provide to the employee or is not available at the alternative worksite?		
4. Does the position involve tasks that require <b>daily</b> face-to-face contact that cannot be achieved through alternate communication tools (e.g., email, telephone, online meetings, electronic file transfer) with: <ul style="list-style-type: none"> <li>a. Supervisor(s)/manager(s)?</li> <li>b. Colleagues/team members/co-workers?</li> <li>c. Customers?</li> <li>d. General Public?</li> </ul>		
5. Does the position involve tasks that require <b>daily</b> access to classified materials and networks (SIPRnet)?		
6. Does the position involve tasks that require <b>daily</b> access to materials or equipment that cannot be moved from the traditional worksite or accessed outside of the traditional worksite such as unique reference materials or special tools?		
7. Does the position involve tasks that require <b>daily</b> access to systems, networks, applications that cannot be accessed at the alternative worksite (e.g., local access only, SIPRnet, etc.)?		
8. Would the performance of position duties at an alternative worksite result in a measurable decrease in the level of service provided to customers (e.g., delays in processing work, inhibiting customer access to the employee)?		

- **If the answer is YES to any of the above questions, the position is typically not eligible for telework.**
- **If the answer is NO to all of the above questions (#1-8) the position may be eligible for regular/recurring and/or situational/ad hoc telework once employee eligibility is determined. Continue with Questions 9-11.**

QUESTIONS	YES	NO
<p>9. Does the position involve tasks that require face-to-face contact that cannot be achieved through alternate communication tools (e.g., email, telephone, online meetings, electronic file transfer) with:</p> <ul style="list-style-type: none"> <li>a. Supervisor(s)/manager(s)?</li> <li>b. Colleagues/team members/co-workers?</li> <li>c. Customers (internal and external)?</li> <li>d. General Public?</li> </ul>		
<p>10. Does the position involve tasks that require access to materials or equipment that cannot be moved from the traditional worksite or accessed outside of the traditional worksite such as unique reference materials or special tools?</p>		
<p>11. Does the position involve tasks that require access to systems, networks, applications that cannot be accessed at the alternative worksite (e.g., local access only, etc.)?</p>		
<p>➤ <b>If the answer to <u>any</u> of the above questions (#9-11) is <u>YES</u> the position is typically not eligible for regular/recurring telework on a full-time basis, but may be eligible for regular/recurring telework on a limited basis, and/or situational/ad hoc telework, once employee eligibility is determined:</b></p> <p><b>1) If the position includes recurring tasks and/or tasks that may be scheduled in advance and performed for at least a full day at an alternative worksite, the position is suitable for regular/recurring telework on a limited basis.</b></p> <p><b>2) If the position does not include recurring tasks and/or tasks that may be scheduled in advance, the position is only eligible for situational/ad hoc telework.</b></p> <p>➤ <b>If the answer to <u>all</u> of the above questions (#9-11) is <u>NO</u> the position may be suitable for all categories of telework once employee eligibility is determined.</b></p>		

<b>EMPLOYEE ELIGIBILITY CRITERIA*</b>		
<b>Complete this section only after position eligibility has been determined.</b>		
<b>QUESTIONS</b>	<b>YES</b>	<b>NO</b>
1. Is the employee's performance currently rated below the fully successful level (e.g., Level 3)?		
2. Is there a memorandum of counseling, warning, or other record by the supervisor documenting deficiencies that cause the employee's overall performance to fall below fully successful, even if the current rating of record is fully successful or higher?		
3. Is there a record of formal disciplinary action within the previous 12 months for the employee?		
4. Is there a record of verbal conversation or written reprimand of behavioral or responsibility concerns (e.g., misuse of leave, excessive tardiness) within the past 12 months?		
5. Has the employee been "officially disciplined" for being absent without permission for more than 5 days in any calendar year?		
6. Has the employee been "officially disciplined" for violations of subpart G of the Standards of Ethical Conduct of Employees of the Executive Branch for reviewing, downloading, or exchanging pornography on a Federal Government computer or while performing official duties?		
<ul style="list-style-type: none"> <li>➤ <b>If the answer to <u>all</u> of the questions (#1-6) is NO, the employee is eligible to telework.</b></li> <li>➤ <b>If the answer to <u>one or more</u> of the questions (#1-6) is YES, the employee is typically not eligible to telework.</b></li> </ul>		
NOTE: The term "official discipline" (as used in questions 5 and 6 above) refers to a disciplinary action that results in the placement of a document in an employee's official personnel file (OPF). The bar on participation remains in effect as long as the document stays in the employee's OPF.		
<b>If the answer is YES to the following questions relative to employee characteristics, the employee is more likely to be suitable for telework.</b>		
<b>QUESTIONS</b>	<b>YES</b>	<b>NO</b>
1. Is the employee able to work independently with minimal supervision?		
2. Is the employee able to solve problems independently?		
3. Does the employee have sufficient skill in using the technologies required for telework (e.g. VPN, Outlook, Encryption software, telephone and voicemail, Defense Connect Online (DCO))?		
4. Does the employee have the ability to communicate, verbally and electronically, with supervisors, co-workers, and customers?		
5. Does the employee have a sufficient level of job knowledge and organizing and planning skills?		
6. Does the employee exhibit discipline toward work and reliability concerning work hours?		

<b>Determination:</b>	<b>YES</b>	<b>NO</b>
<u>Position</u> is eligible for regular/recurring telework (set schedule)		
<u>Position</u> is eligible for situational/ad hoc telework		
<u>Employee</u> is eligible for telework		
<b>If the position or employee is not telework eligible, please select all that apply as justification for the determination:</b>	<b>Select All that Apply</b>	
Not Telework Eligible – Position requires employee’s presence to perform the job.		
Not Telework Eligible – Position requires daily face-to-face contact with supervisor, other employees, or customers/the public.		
Not Telework Eligible – Position requires access to material or special equipment.		
Not Telework Eligible – Position requires daily access to classified material.		
Not Telework Eligible – Duty performance or conduct.		
Not Telework Eligible – Employee is serving in a probationary period.		
Not Telework Eligible – Employee is a trainee or intern.		

Identify reasons for denying telework based on employee ineligibility:
Additional information justifying position or employee telework ineligibility: