

Policies and procedures



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Subject Telework Policy
Section Human Resources; Information Services; Sustainability
Approved by Andrew Scott, Interim Chief Operating Officer

POLICY

It is Metro's policy to allow employees to telework when there are opportunities compatible with business needs. Metro supports authorized telework to reduce greenhouse gas emissions in operations, consistent with the Metro value of sustainability.

Applicable to

All regular and limited duration employees.

Where provisions of an applicable collective bargaining agreement directly conflict with this policy, the provisions of that agreement will prevail.

Definitions

Telework: a work flexibility arrangement in which an employee performs the duties and responsibilities of the employee's position from an approved worksite other than the regularly assigned work site.

Routine telework: telework that is a regular and recurring part of the employee's work schedule.

Temporary telework: a short-term telework arrangement with a specific term or duration.

Guidelines

1. A supervisor and Department Director will approve telework on a routine or temporary basis if an employee meets the *Eligibility and approval criteria* and the *Terms and conditions of telework* listed below.
2. The employee must provide a suitable worksite and the equipment necessary for remote work. Metro will not reimburse employee expenses related to telework.
3. Telework arrangements must be documented in a Telework Agreement approved by the employee's supervisor, the Department Director, and the Human Resources Department. The Information Services Director must also approve if Metro equipment will be used. A copy will be placed in the employee's personnel file.

4. Temporary telework may be permitted by the employee's supervisor, subject to the Department Director's approval, on a case-by-case basis. The supervisor may require the terms of temporary telework to be clarified in writing.
5. If the temporary telework is for a light duty assignment relating to a workers' compensation claim, the duties and term of the assignment must be in writing and approved by the employee's health care provider in addition to other approvals.
6. Employees may not telework without their supervisor's prior approval.
7. Telework is not a substitute for childcare. Appropriate childcare arrangements must be made for telework hours.
8. Teleworking employees must comply with:
 - a. the performance and conduct standards for their position;
 - b. the equipment, software, and remote access standards established by the Information Services Department; and
 - c. all other Metro policies and procedures.

Procedures

Eligibility and approval criteria

1. Eligibility: Regular and limited duration employees who:
 - a. have completed probation, and
 - b. have not been disciplined for improper use of work time within the last two years and
 - c. Do not have current performance issues including an active performance improvement plan or discipline within the past two years.
 - d. The employee has demonstrated, to the supervisor's satisfaction, the capability to work productively without direct supervision.
2. Not all positions are suitable for telework. Preliminary approval will be based on the ability to meet all of the following criteria:
 - a. The nature of the employee's work requires minimal direct supervision and face-to-face interaction with colleagues and customers, or such interaction can be successfully scheduled to permit telework.
 - b. There is minimal need for specialized materials or equipment.
 - c. The employee's job is not location-dependent and has tasks and deliverables that can be clearly defined and monitored at a remote location.
 - d. The employee's absence from the regular worksite is not detrimental to the productivity of the work group.
 - e. The employee can provide an appropriate worksite and the necessary equipment and software as described below (terms and conditions of telework).

3. Final approval and implementation of a proposed telework arrangement is contingent on the availability of software licenses and Information Services staff capacity as applicable.

Terms and conditions of telework

A teleworking employee's terms and conditions of employment remain the same as for non-teleworking employees except as outlined in this policy.

1. The employee is responsible for meeting all performance and conduct standards of the position, including expectations for productivity and safe work practices.
2. The employee is responsible for establishing an appropriate work environment within the employee's home or alternate work location. The employee is responsible for maintaining this space to the same safety and other standards as would be acceptable on Metro premises.
 - a. Teleworkers are encouraged to schedule an appointment with the workers' compensation specialist for information on ergonomic considerations for setting up a home workspace.
 - b. Metro may make on-site visits to the employee's work site, at a mutually agreed upon time, to ensure the designated workspace is safe and free from hazards, to conduct an ergonomic assessment and to maintain, repair, inspect or retrieve Metro-owned equipment, software, data, and supplies.
 - c. Metro maintains workers' compensation insurance for compensable injuries that occur in the course and scope of the employee's work during scheduled work hours. In the event of an injury during teleworking hours, the employee must immediately report the injury to their supervisor. Workers' compensation coverage will not apply to non-job-related injuries that occur in the home. The employee remains liable for injuries to third parties and/or members of the employee's family on the employee's premises.
3. Metro may choose to provide special equipment, software or other resources for the employee's use while teleworking.
 - a. Ordinary office supplies, such as pens and notebooks, may be obtained from Metro in reasonable quantities from the employee's department. Metro will not reimburse out-of-pocket expenses for materials and supplies that are available from Metro.
 - b. Metro-owned software may not be duplicated.
 - c. Employees are responsible for exercising all due care to prevent damage to or theft of Metro property in their care, custody or control. Employees will be held responsible for damage to Metro equipment resulting from intentional misuse or gross negligence, or from a power surge if no surge protector is used.
 - d. Teleworkers may not use Metro-provided equipment, software and other resources for personal purposes except as allowed by the Metro Resources: Acceptable Use policy.
 - e. Metro will not reimburse employees for expenses associated with telework. Metro will reimburse the employee for other expenses it would have paid if the employee were working in the office, consistent with Metro policies. Metro assumes no liability for loss, damage, or wear of employee-owned equipment.

4. The costs of required software licenses and other applicable expenses will be charged to the teleworking employee's department.
5. Teleworking employees must comply with all applicable Metro policies and procedures, with particular attention to the Information Technology: Acceptable Use and Records and Information Management (RIM) policies.
 - a. The employee is responsible for ensuring that electronic devices and software used for telework are compatible with Metro standards as established by the Information Services Department. The IS Department cannot guarantee that all home systems will be compatible. The employee is responsible for converting files to Metro's standard formats.
 - b. The employee is responsible for protecting the integrity and confidentiality of copyrighted software and sensitive Metro data. Restricted-access materials may not be removed from Metro premises or accessed through the computer without the supervisor's advance approval. For positions that have security and/or confidentiality requirements, procedures must be established and followed to ensure protection of confidential information. Procedures may include a locked or secure workplace, computer access passwords, or restricted use of files at the telework site. Security and confidentiality issues shall be addressed in the Telework Agreement.
 - c. Employees are advised that Metro documents, communications and work products stored on personally owned devices are also subject to public records law. The use of personally owned electronic devices such as home computers, laptops, smart phones and tablets to access Metro's internal networks may subject the personal device to review and possible disclosure.
6. **Work Hours and Scheduling:** The number of hours worked by the employee will not change because of telework. Work hours will be scheduled following regular procedures. Any requests for schedule changes, leave or overtime must be approved by the supervisor in a manner consistent with Metro policies and department work rules.
 - a. The amount of time spent teleworking during a workweek may vary according to each job, equipment needs and the individual Telework Agreement. At a minimum, the telework schedule must allow adequate regular office time for meetings, access to facilities and supplies, and communication with other employees and with customers.
 - b. Information Services cannot guarantee that the network will be available during nonstandard hours. Help Desk support is not available during nonstandard hours.
 - c. Teleworking employees may be required to track their work hours, even if they are paid on a salary basis, to facilitate management of the position and ensure compliance with legal and contractual requirements.
 - d. Teleworking employees are expected to devote their time to the agreed upon telework days and hours and not to engage in other non-work-related activities.
7. **Accessibility and Communication:** While teleworking, the employee must be reachable by telephone, network access, and/or email during work hours as required by the supervisor.
 - a. The supervisor will establish expectations for checking and responding to email and voicemail messages.
 - b. The teleworker and supervisor will jointly determine who will be given the teleworker's personal or alternate work site phone number.

8. **Travel:** The employee's regular Metro office is the official worksite for the purpose of calculating reimbursable expenses for work-related travel. Travel to and from Metro premises and the telework worksite shall not be a reimbursable expense.
9. **Telework Agreement:** The terms of a routine telework arrangement must be documented in a Telework Agreement between the employee and the supervisor. The Agreement must clearly define the following:
 - a. The anticipated duration of the teleworking arrangement;
 - b. The location of the off-premises work;
 - c. The telework schedule, identifying the days/hours the employee will work at home and on Metro premises;
 - d. The means by which the employee can be reached during off-premises work and expectations for maintaining contact;
 - e. The equipment and software to be provided by the employee;
 - f. Any Metro-owned resources the employee will use at a non-Metro site, and the terms and conditions under which such resources will be used;
 - g. Any security protocols related to the protection of confidential information and any Metro-issued equipment; and
 - h. Any other requirements as determined by the supervisor.
10. Supervisors and teleworking employees will review telework arrangements at least annually to ensure that they remain effective and suitable to the needs of the position. Telework Agreements may be modified or terminated at Metro's discretion, if management determines that the arrangement is not meeting Metro's business needs.

Responsibilities

Employees:

- Complete the Telework Agreement form and submit to your supervisor if you would like to telework and can comply with the requirements of this policy.
- Work with your supervisor to determine telework arrangements and complete a Telework Agreement.
- Comply with your Agreement and all applicable Metro policies, procedures and work rules.

Supervisors:

- Evaluate telework requests in light of Metro business needs, the *Eligibility and approval criteria and Terms and conditions of telework* (above) and the Metro value of sustainability.
- Provide a timely response to employees requesting telework.
- Ensure telework terms are documented in a Telework Agreement and coordinate approval of the Agreement.

- Supervise teleworking employees to ensure compliance with all applicable policies and performance and conduct expectations.
- Review telework arrangements annually to ensure continued effectiveness and suitability to the position.

Department Directors:

- Develop department-specific work rules related to telework as needed.
- Review and approve proposed Telework Agreements.

Human Resources Department:

- Review and approve Telework Agreements.
- Maintain approved Telework Agreements in the employee's personnel file.

Information Services Department:

- Publish equipment and software standards, guidelines for remote access and security protocols as needed in support of telework program.
- Review and approve Telework Agreements.
- Set up, audit and close out remote access systems to ensure consistency with technical standards and security protocols.

References

Conduct Expectations

Metro Resources: Acceptable Use policy

Information Technology: Acceptable Use policy

Records and Information Management policies and procedures