

eTelework System User Guide

For Employees, Supervisors, Directors/Designees, and Telework Management Officers (TMOs)



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Overview

This user guide provides the following information regarding the eTelework System:

- How employees can:
 - Apply to telework (recurring or intermittent/situational)
 - Check the status of a telework application
 - Modify a telework application that has already been submitted
 - Submit an appeal
- How supervisors and directors/designees can:
 - Approve/deny an employee's telework application
 - View pending applications
 - Send a telework application back to an employee for revision
- How Department Telework Management Officers (TMOs) can:
 - Search and run reports on telework applications
 - Cancel existing telework applications

Note: This user guide only covers how to use the online eTelework system. For other information related to telework (including the County Telework Policy), visit montgomerycountymd.gov/telework.

How It Works at-a-Glance

- 1. The employee submits an application via the online system. The request is automatically routed to the employee's supervisor for review and recommendation.
- 2. The supervisor reviews the online application, selects a date for the telework schedule to begin, completes the Manager Suitability Assessment, and submits a recommended schedule for telework or denial of telework to the department director or director designee (or returns the application to the employee for corrections).
- 3. The department director/designee reviews the online application and the supervisor's recommendation, then submits a decision of approval or denial.
- 4. The employee is notified of the department decision and can begin teleworking on the schedule start date if the application was approved. The employee also has the option to appeal the decision.

For Program Details

For details about the Telework Program, including the Telework Policy, terms and definitions, who can apply, training and technology requirements, how to appeal a decision, timekeeping guidance, tips for success in a remote environment, and other resources, please visit:

montgomerycountymd.gov/telework

Access the System

- Go to https://azex23.montgomerycountymd.gov/OHReTelework/. (This link to access the system can also be found on the Telework Webpage.)
- Log on with your AccessMCG username and password:



Apply for Telework (Employees)

 Select NEW APPLICATION to start an eTelework application. If you currently have an active telework arrangement, this button will instead say UPDATE TELEWORK APPLICATION.



The Telework Application Form tab will appear.

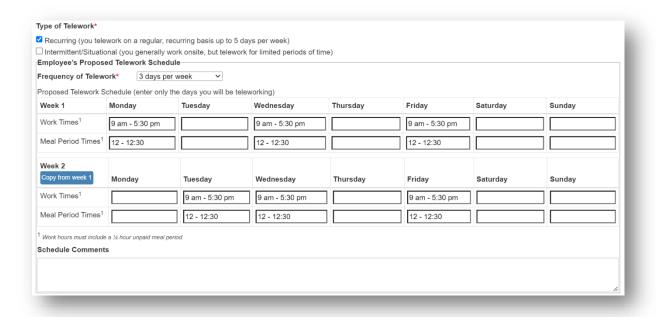
Note: The two columns of employee information displayed at the top of the form (Name, Job Title, etc.) are pre-populated from Oracle. If any of this information is inaccurate, please contact your departmental HR Liaison to correct it in Oracle.

Not a first-time teleworker? If you have an active telework arrangement, your new application will be pre-populated with the information you submitted in your previous application for your convenience (unless your position has recently changed). Carefully review all tabs and edit information as needed before submitting your new application.

- Select the Type of Telework that you are applying for by clicking one of the checkboxes. For more
 information about the different types of telework, visit MCG's <u>Telework Webpage</u>.
 - a. If you select the **Intermittent/Situational** telework checkbox, the form will display your telework schedule **As Approved**, and you will not need to fill out a proposed schedule.

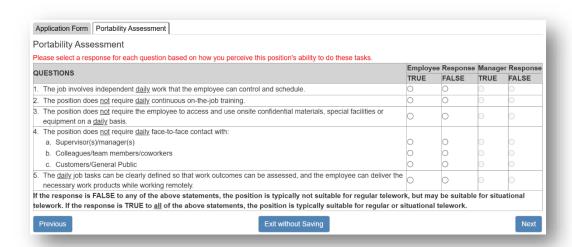
b. If you select the **Recurring** telework checkbox, additional fields will appear for you to provide your proposed telework schedule for a standard pay period. Select an option from the **Frequency of Telework** dropdown menu. Enter the work times (including meal periods) for your proposed telework schedule for Week 1 and Week 2. If your proposed telework schedule is the same each week, you can simply fill out the first week and then click the blue "Copy from week 1" button to automatically fill in week 2 with the same schedule.

Note: If you are applying for recurring telework and your proposed telework schedule is not the same every pay period, enter an example schedule in the Work Times/Meal Period Times boxes and use the Schedule Comments section to state other variations or explanatory details to your schedule. Consult with your supervisor to ensure you are entering the information into eTelework in a way that makes sense for your department. See the sample below.

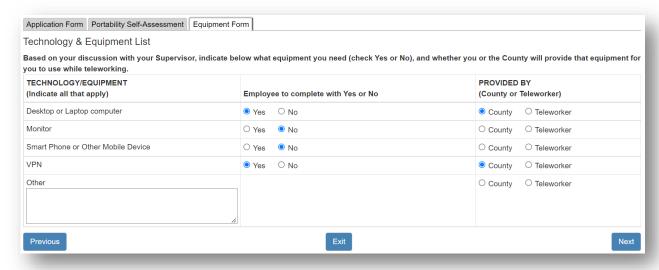


- Enter the address of the location where you plan to work remotely (typically your home address), then enter the telephone number where you can be contacted when working remotely.
- Use the final textbox to explain how your job responsibilities are suited for teleworking. Be descriptive
 and specific when referring to your job responsibilities to expedite your application process.
- Click Next to continue your telework application. The Portability Assessment tab will appear.

Respond to each statement on the assessment by selecting TRUE or FALSE.

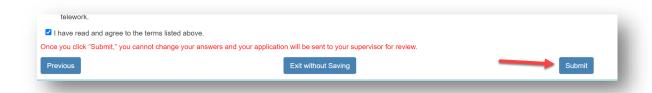


- Click Next to continue your telework application. The Equipment Form tab will appear.
- Based on your discussion with your Supervisor, indicate what equipment you need while teleworking by checking Yes or No in the second column. If you select Yes for any items, indicate whether you or the County will provide that equipment for you to use while teleworking by checking County or Teleworker in the third column. List any additional equipment that you will need while teleworking in the Other field.



Click Next to continue your telework application. The Acknowledgements & Supervisor Approval
tab will appear. Carefully review each of the statements. Then, click the checkbox to indicate that you
have read and agree to the terms listed.

Click Submit to send your application to your supervisor for review. The application will be routed to
your immediate supervisor, who will receive an email notification that a telework application has been
received in the system. You will also receive an email confirmation that your request has been sent.



• Click Logout at the top-right of the screen.

Check the Status of Your Application (Employees)

Employees can <u>log into the eTelework system</u> at any time to view their request status in the <u>Stage</u> column. In the example below, the employee has submitted a request for recurring telework and it has been sent to the immediate supervisor for review.



• You can review your submitted application by clicking on the blue link over your name in the first column.

View Pending Applications (Supervisors/Directors/Designees)

 Supervisors, directors, and director designees can log into the <u>eTelework system</u> at any time to view telework applications pending their action. The example below shows the director/designee view of two telework applications pending director-level decision. The current status of each application can be seen in the **Stage** column.



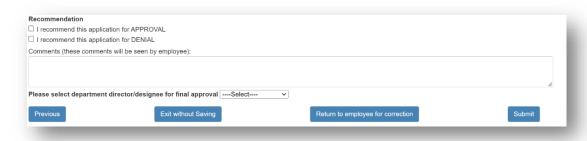
Click on the blue link over each employee's name in the first column to open the application.

Submit a Recommendation on an Application (Supervisors)

 The supervisor will receive an email notification when an employee submits an application through the system. The supervisor should click on the link in the email and then log on to view the application details. (The supervisor can also go <u>directly to the system</u> and click on the employee's name in the first column to open that employee's application.)



- Underneath the employee's proposed schedule, use the section Supervisor Proposed Schedule and Frequency of Telework to recommend any changes to the employee's proposed schedule if needed.
- Select a date for the telework schedule to begin. If you do not select a date, the employee's schedule will default to begin on the next pay period.
- Click Next to complete the Portability Assessment tab. Review the employee's job responsibilities
 and select TRUE or FALSE for each statement on the assessment, considering the employee's job
 responsibilities.
- Click Next and carefully review the Equipment Form tab, making any changes needed.
- Click Next to move to the Acknowledgments & Supervisor Approval tab. In the Recommendation section, check one of the options based on your decision and enter any comments. The comments you enter will be seen by the employee.



Once you have completed your recommendation on the employee's telework application, select the
appropriate department director/designee from the dropdown menu. Then, click **Submit** to send the
employee's application to the department director/designee for a final determination.

Note: If you are a department director or designee and you are reviewing a telework application of one of your direct reports, you must complete both the supervisor and director-level determinations at the same time in eTelework. See the Application section of this guide for more information.

Approve/Deny an Application (Directors/Designees)

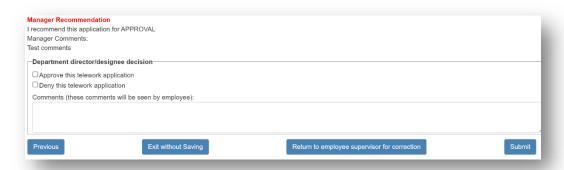
The director (or director's designee) will receive an email notification when a supervisor makes a
determination on a telework application through the system. The director/designee should click on the
link in the email and then log on. (The director/designee can also go directly to the system and click
on the employee's name in the first column to open that employee's application.)



• The director/designee will see the application details submitted by the employee, as well as the supervisor's recommendation and any comments.



- Carefully review the information on each page of the application, then click Next until you get to the Acknowledgments & Supervisor Approval section.
- In the Department director/designee decision section at the bottom of the page, indicate your
 approval or denial by selecting one of the checkboxes. Add any additional comments. These comments
 will be seen by the employee.



- Click Submit to complete your determination. The employee will receive an email notification of the decision.
- Note: If you are a department director or designee and you are reviewing a telework application of one
 of your direct reports, you must complete both the supervisor and director-level determinations at the
 same time in eTelework.

Update/Edit a Submitted Application (Employees)

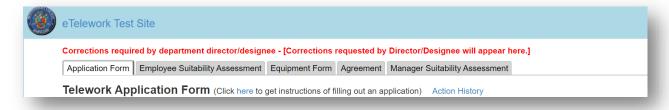
- If you need to edit your telework application after it has been submitted, log into the <u>eTelework system</u> and check the current status of your application (under the "Stage" column). If you need to make a change to an active telework arrangement (for example, if your remote work location changes midyear), see section (d) below.
 - a) If the application status is **Requester Fix Application**, this means that your supervisor has returned your application to you with requested corrections from your supervisor and/or director/designee. Click on your name in the leftmost column to open your application and make the requested edits, then resubmit your application for department approval. (You can also click the link in the notification email you received.)
 - b) If your application status is **Supervisor Review Application**, you should ask your supervisor to log into the eTelework system and send your application back to you for correction. You will then be able to edit and resubmit your application.
 - c) If your application status is **Director/Designee Review**, your supervisor will need to ask the director/designee in your department to send the application back to your supervisor for correction in the eTelework system. Your supervisor can then log in and send your application back to you for correction.
 - d) If your application status is **Approved/Active**, click the "Update Telework Application" button at the top of the eTelework landing page to enter and submit your updated information. Each time an update is made, your supervisor and director will need to approve. There is no need to cancel the previous arrangement before submitting the update.

Return an Application for Corrections (Supervisors)

- If a correction is needed on an employee's telework application, the supervisor should return the
 application to the employee to make the requested corrections.
- Log into the <u>eTelework system</u> and check the status of the employee's application under the Stage column. If the Stage listed is **Supervisor Review Application**, the application is still under supervisor review. If the Stage listed is **Supervisor Fix Application**, this means the department director/designee has returned the application to the supervisor with requested corrections.
- Click on the employee's name in the first column to open the telework application:



• If the application was returned to the supervisor by the director/designee, a message will be displayed in red at the top of the application with the corrections requested by the director/designee:



Click Return to employee for correction:



 A comments box will appear. Describe the corrections requested by you and/or the director/designee, then click **Submit**. The employee will receive an email notification and will be able to log into the eTelework system to edit their application as needed.

Return an Application for Corrections (Directors/Designees)

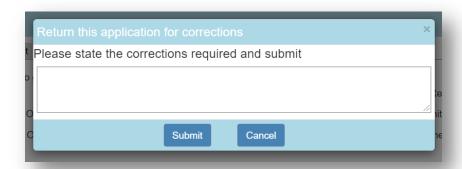
If a correction is needed on an employee's telework application after it has been submitted to the
department director/designee for review, the department director/designee should log into the
eTelework system and click on the employee's name in the first column to open the telework
application:



 Click Return to employee supervisor for correction to route the telework application back to the supervisor:



A comment box will appear on the screen. Describe the corrections needed and click Submit.

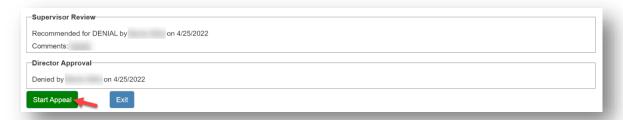


 The supervisor will then be able to log into the eTelework system and return the application to the employee for correction.

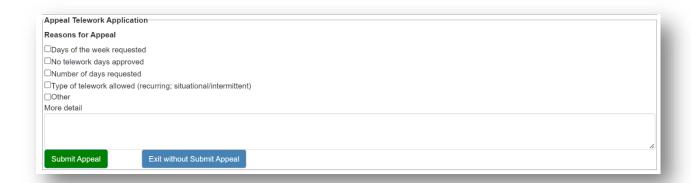
Submit an Appeal (Employees)

- When a decision has been made on your telework application, you will receive an email notification. If you intend to appeal the decision, you should initiate the appeal in the eTelework system.
 - **Important:** If you are thinking about submitting an appeal, you are strongly encouraged to review the appeal submission deadlines and process outlined in the <u>Telework Policy</u> as soon as possible. The applicable appeal submission deadline differs depending on whether you are a bargaining unit member or an unrepresented employee.
- Log into the <u>eTelework system</u> and click on the blue link over your name in the first column to open your application.

 Scroll down to the bottom of the page. You will see a record of your supervisor's recommendation and your department director/designee's decision. Click the green **Start Appeal** button in the lower left of the screen.



Select one or more reasons for your appeal by clicking the appropriate checkbox(es). If you select
 Other, you will need to provide a written description of your appeal reason. Add any additional details
 relevant to your appeal in the More detail text box.



Note: The next steps differ depending on whether you are a bargaining unit member or an unrepresented employee, as outlined in the County Telework Policy. See details below before submitting.

Bargaining Employees

- Click the green Submit Appeal button to send your appeal to a representative from your union for review. You will receive email confirmation.
- Your union representative will receive an email notification that an appeal requires action. Your union
 representative must review the appeal and then submit it to the County in the eTelework system by the
 deadline stated in the Telework Policy.
- Before advancing the appeal, your union representative may return the appeal to you with requested
 corrections. Should this occur, you will receive a notification email. You will then be able to log into the
 eTelework system and make the requested corrections. You are encouraged to take action as soon as
 possible.

- When your union representative advances your appeal, a notification email will be sent to you, your supervisor, your department director and designees, your departmental TMO, a representative from the Office of Labor Relations (OLR), and the County Telework Manager.
- At this point, you should wait to receive a step 1 appeal Outlook/MS Teams invitation via email.
- After the step 1 appeal meeting occurs, you will receive an email documenting the decision made in the step 1 appeal. This email will include information about potential next steps should you want to take them.
- If your original application was denied and an agreement is reached on your appeal resulting in your
 approval to telework, you will need to file a new application to telework based on the agreement
 reached. See the <u>Apply for Telework</u> section of this guide for instructions.
- If your original application was approved and an agreement is reached on your appeal resulting in changes to your telework schedule, you will need to update your application to reflect the new schedule. See the Update/Edit a Submitted Application section of this guide for instructions.

Unrepresented Employees

- Click the green Submit Appeal button to submit your appeal to the County Telework Manager for a
 decision. You will receive email confirmation of your submission. A notification email will also be sent to
 your supervisor, your department director/designees, your departmental TMO, a representative from
 the Office of Labor Relations (OLR), and the County Telework Manager.
- Before making a decision, the County Telework Manager may return the appeal to you with requested corrections. Should this occur, you will receive a notification email. You will then be able to log into the eTelework system to make the requested corrections and resubmit.
- You will receive an email when the County Telework Manager has made a decision on your appeal.
 This email will inform you of the decision and will include information about potential next steps should you want to take them.
- If your original application was denied and your appeal results in your approval to telework, you will
 need to file a new eTelework application based on the result of your appeal. See the <u>Apply for</u>
 Telework section of this guide for instructions.
- If your original application was approved and your appeal results in changes to your telework schedule, you will need to update your application to reflect the new schedule. See the <u>Update/Edit a Submitted</u> Application section of this guide for instructions.

Retract an Appeal (Employees)

- Log into the eTelework system and check the Appeal Status column.
- If the appeal status is "Appeal in Progress," click on your name in the leftmost column to open your application. Click the green Retract Appeal button at the bottom of the page. Enter any comments in the text box, then click the Submit Retract Appeal button. No further action is needed from you. You will receive a confirmation email when the eTelework system coordinator has completed your appeal retraction.
- If the appeal status is "MCGEO review appeal," click on your name in the leftmost column to open your application. Click the green **Retract Appeal** button at the bottom of the page. Enter any

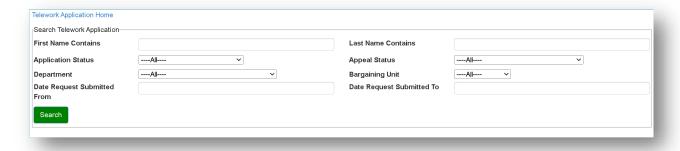
comments in the text box, then click the **Submit Retract Appeal** button. No further action is needed from you. You will receive a confirmation email when your union representative has completed your appeal retraction.

Search Applications (TMOs)

- Log into the <u>eTelework system</u>.
- Click on the **SEARCH** button at the top of the page:



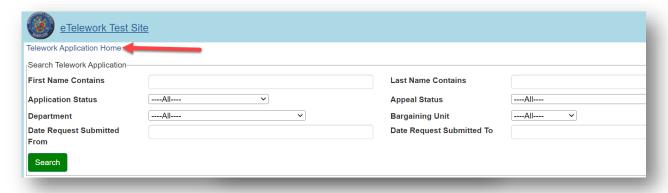
 The Search Telework Application page will appear. You will only have access to view applications in your department.



• To view all applications in your department, click the green **Search** button without selecting any filter criteria. Alternatively, select or enter filter criteria from the available options to narrow your search, then click the green **Search** button. A list of applications will appear:



- You can adjust the number of entries displayed on each page by selecting one of the dropdown options above the table. The default will display 25 entries per page. Scroll down to the bottom of the screen to navigate between pages:
- You can also sort the applications by clicking any of the table column headers. Click again on the same header to reverse the order.
- To return to the main dashboard, click on "Telework Application Home" at the top left of the page.



Download a Report in Excel (TMOs)

- Follow the instructions in the <u>Search Applications</u> section of this guide to run a search for the appropriate list of applications in your department.
- Click the green Export to Excel button to download the report as an Excel document. You may need
 to wait a few moments for the download to begin.



 Depending on your web browser and device, the downloaded document may appear at the bottom of your screen. If you do not see it, check your device's downloads folder.

Cancel an Application (TMOs)

Notes:

- In the current version of the eTelework system, employees attempting to update or correct their existing
 approved application can do so without canceling their existing application. These employees should
 follow the instructions in the <u>Update/Edit a Submitted Application</u> section of this guide.
- When an employee changes departments, their telework arrangement will be automatically canceled.
 The employee and their new supervisor will receive email notification. There is no need for you to take any action.
- When an employee changes position within the same department, their telework arrangement will remain active. The employee and their supervisor will receive a courtesy email reminder to review the existing arrangement. If it is determined that the employee is no longer eligible for telework in their new position, you will need to cancel the arrangement using the steps outlined below.
- You can also use the steps below to cancel an arrangement at any time if it is determined that an
 employee should discontinue participation in the County telework program.

To cancel an application:

- Follow the instructions in the <u>Search Applications</u> section of this guide to run a search and locate the application you intend to cancel.
- Click the blue Cancel Telework link located in the Cancel Telework column of the table.



 The employee and supervisor will receive notifications indicating that the employee's application has been canceled.

Resources

For details about how the Telework Program works and who can apply, please visit montgomerycountymd.gov/telework.

If you have questions about the Telework Program or need to report a system issue, contact telework@montgomerycountymd.gov.

This document provides general information about Montgomery County Government's eTelework System. If there is an inconsistency between the content of this document and any other documents, the applicable document will prevail (e.g., the law, regulation, procedure, or collective bargaining agreement). Please consult appropriate references, such as the County Telework Policy, Montgomery County Personnel Regulations and collective bargaining agreements for additional information.

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