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**Chat history**

**You said:**

This is my company's out-of-state work policy: Out-of-State Remote Work Policy INTRODUCTION The Agency recognizes that, in exceptional circumstances, it may be mutually beneficial for employees to telework out-of-state. This policy establishes the considerations and processes we will use to evaluate and approve such requests. Requests for long term work outside the U.S. will not be considered. REFERENCES AGENCY Travel Manual, AGENCY Flexible Work Schedules For Full-Time Employees Policy, AGENCY Telework Policy SCOPE This policy is effective during the 2021-2023 Biennium and applies to AGENCY employees who have successfully completed their in-training program and have permanent or exempt status. This policy does not preclude any employee from having a permanent residence in a bordering state (within the United States) and within a reasonable commuting distance from their AGENCY duty station. APPLICABLE FORMS Telework Agreement Out of State Work Request Out of State Work Agreement Definitions Short Term Out-of-State work – Out-of-state work that will last more than two weeks, up to a maximum of four months. Does not involve a change in permanent address. Out-of-State Relocation – The employee moves to another state that is not within a reasonable commuting distance from their AGENCY duty station. POLICY NO. 1 This Policy Applies Only To Work Performed Within The U.S. Employees may not take their AGENCY assigned computers or equipment outside the U.S. or perform work outside the U.S. unless they have been approved to do so by the AGENCY HEAD. This restriction applies to all work, even when it is under the two week period. POLICY NO. 2 Employees Who Take Their AGENCY Assigned Computers Out-Of-State Must Submit A Help Desk To Information Services To Notify Them Of The Location And Time Period. Employees should send the Help Desk at least 2 business days in advance and make sure they cc: their manager. POLICY NO. 3 Employees May Work Out-of-State On A Short Term Basis With Approval Of Their Director Or Designee and the Director of Administrative Services. Before approving out-of-state work, the Director or designee will notify both Human Resources and Financial Services so that they can identify tax withholding requirements, insurance, and other considerations. The Director or designee will confirm that the Chief Information Security Officer authorizes the arrangement. POLICY NO. 4 While Working Out-of-State, Employees Must Be Available During Their Approved Work Schedule Hours. Hours of work will be on Pacific Standard Time. Employees must notify their supervisor prior to taking time away from work during the day to perform personal business, and extend their work hours or submit leave accordingly. POLICY NO. 5 On A Limited Case-by Case Basis, An Employee May Be Approved To Continue Employment With AGENCY After Relocation To Another State. All requests to work following relocation to another state will be approved by the AGENCY HEAD. Considerations include but are not limited to: • The employee’s job performance • The employee’s ability to fulfill their core job responsibilities from another state • The staffing needs of their team and the agency • Number of other AGENCY staff approved to work out-of-state • The administrative impact on AGENCY POLICY NO. 6 Before Working Out-Of-State, Employees Must Have An Approved Work Schedule and Telework Agreement On File. Employees Relocating Out-Of-State Must Also Have An Approved Out-of-State Agreement On File. In accordance with the Telework Policy, telework is voluntary and may be discontinued or changed by the employee or manager at any time. Out-Of-State Agreements will be approved for a maximum of one year. AGENCY reserves the right to discontinue the agreement with a 30-day notice. POLICY NO. 7 The Official Duty Station Shall Be Designated By The Agency. Official duty stations for all AGENCY employees will be in State and all requirements outlined in the AGENCY Travel Manual shall apply. While the employee will complete most of their work remotely, they may be required to travel to report to their official duty station periodically, as required by their manager. Employees will not be paid for their time or reimbursed for transportation expenses for a commute to their official duty station from their out-of-state residence. Additional Considerations for Employees and Managers: Taxes – Addressing payment of payroll taxes when employees work from another state is one of the most important tasks involved in out-of state work. Taxes requirements for other states differ, and can be assessed against the employer and employee. Tax requirements are often applicable for all work performed in the other state. Guidelines for determining residency status in a state may be found on their state tax authority website. Workers’ compensation – Employees who work from outside of State may not be covered by State Department of Labor & Industries Workers’ Compensation industrial insurance. In such cases, AGENCY will not take State Workers’ Compensation wage deductions from employees whom are working in an out-of-state location, unless there is a reciprocity agreement with the other state that applies under the specific circumstances of the out-of- state teleworking employee. Financial Services will be responsible for identifying any obligations for workers’ compensation insurance coverage in the specific state where the employee is located and will coordinate the employer/employee deductions as necessary. Out-of–state employees must report any work-related illness or injury to Human Resources immediately. Human Resources shall assist employees determine how to file a claim in the state in which the injury occurred. Paid Family & Medical Leave (PFML) – Employees who work outside of may not be covered by the State Paid Family & Medical Leave program, unless they have at least 820 hours reported to the PFML program in a qualifying period. Unemployment insurance – Employees will continue to be covered by unemployment insurance since they have a State duty station. Health insurance and benefit impacts – Plan options for health insurance varies based on work location and home address as established by the State Healthcare Authority. It is the employee’s responsibility to verify plan/special open enrollment options, if any exist.

**ChatGPT said:**

Your company's out-of-state work policy seems comprehensive and well-structured, covering various aspects such as eligibility, duration, approval processes, and considerations for both employees and managers. Here's a breakdown of its key points:

1. **Scope and Definitions**: The policy defines terms like "Short Term Out-of-State Work" and "Out-of-State Relocation" to clarify the duration and nature of out-of-state arrangements.
2. **Policy Application within the U.S.**: It restricts employees from taking company equipment outside the U.S. without prior approval.
3. **Notification Requirement for Out-of-State Work**: Employees are required to inform the Information Services department about the location and duration of their out-of-state work.
4. **Approval Process for Short-Term Out-of-State Work**: Directors or their designees must approve such requests after considering various factors including tax, insurance, and security implications.
5. **Work Schedule and Availability**: Employees must adhere to their approved work schedule and be available during those hours, with specific emphasis on notifying supervisors for personal time during work hours.
6. **Approval for Post-Relocation Work**: Employees seeking to continue working for the agency after relocating to another state must obtain approval from the agency head, considering various job-related and administrative factors.
7. **Document Requirements**: Employees must have approved telework and out-of-state agreements on file before working remotely or relocating.
8. **Official Duty Station**: The agency designates the official duty station, with occasional travel requirements to report to this station.
9. **Additional Considerations**: The policy addresses important considerations such as taxes, workers' compensation, paid family and medical leave, unemployment insurance, and health insurance/benefits, providing guidance for both employees and the financial services department.

Overall, the policy appears thorough and considers the various legal, logistical, and administrative challenges associated with out-of-state work arrangements. It sets clear expectations for employees and provides a structured approval process to ensure compliance with regulations and organizational needs.

**You said:**

Based on this policy (and only this policy), please prepare a step by step procedure for how an employee can get approval for short-term out of state work. For each step, specify who the actor is and what they need to do.

**ChatGPT said:**

Certainly! Here's a step-by-step procedure for an employee to obtain approval for short-term out-of-state work:

1. **Employee Identifies Need for Out-of-State Work**
   * Actor: Employee
   * Action: Determine the need for short-term out-of-state work, ensuring it meets the criteria outlined in the policy.
2. **Employee Prepares Out-of-State Work Request**
   * Actor: Employee
   * Action: Complete the "Out-of State Work Request" form, including details such as the purpose of travel, duration of stay, and location.
3. **Employee Submits Out-of-State Work Request**
   * Actor: Employee
   * Action: Submit the completed "Out-of State Work Request" form to their immediate supervisor or manager.
4. **Manager Reviews Out-of-State Work Request**
   * Actor: Manager
   * Action: Review the submitted "Out-of State Work Request" form to ensure it aligns with business needs and the requirements of the policy.
5. **Manager Consults with Director or Designee**
   * Actor: Manager
   * Action: If the request meets initial approval, the manager consults with the Director or their designee to further evaluate the request.
6. **Manager Notifies Human Resources and Financial Services**
   * Actor: Manager
   * Action: Upon receiving preliminary approval, the manager notifies the Human Resources and Financial Services departments to assess tax withholding requirements, insurance, and other considerations.
7. **Manager Obtains Approval from Director and CISO**
   * Actor: Manager
   * Action: Obtain final approval from the Director or their designee, ensuring that the Chief Information Security Officer (CISO) authorizes the arrangement, if applicable.
8. **Manager Notifies Employee of Approval**
   * Actor: Manager
   * Action: Inform the employee of the approval for short-term out-of-state work, specifying any conditions or requirements.
9. **Employee Sends Help Desk Notification**
   * Actor: Employee
   * Action: At least 2 business days before the out-of-state work begins, the employee sends a Help Desk notification to Information Services, cc'ing their manager, to inform them of the location and time period.
10. **Employee Adheres to Approved Work Schedule**

* Actor: Employee
* Action: During the approved out-of-state work period, the employee adheres to their approved work schedule, ensuring availability during designated hours.

1. **Employee Complies with Reporting Requirements**

* Actor: Employee
* Action: Notify their supervisor prior to taking time away from work during the day for personal business, and extend work hours or submit leave accordingly.

Following these steps ensures compliance with the company's policy and facilitates a smooth process for obtaining approval for short-term out-of-state work.

**You said:**

Repeat this exercise, but this time give me a step by step procedure for an employee to get approval to relocate out of state. Please use the same format.

**ChatGPT said:**

Certainly! Here's a step-by-step procedure for an employee to obtain approval to relocate out of state:

1. **Employee Identifies Need for Relocation**
   * Actor: Employee
   * Action: Determine the need to relocate out of state, considering personal circumstances and ensuring it aligns with the criteria outlined in the policy.
2. **Employee Prepares Relocation Request**
   * Actor: Employee
   * Action: Complete the "Out-of State Work Request" form, indicating the intention to relocate permanently out of state and providing relevant details such as the reason for relocation and proposed timeline.
3. **Employee Submits Relocation Request**
   * Actor: Employee
   * Action: Submit the completed "Out-of State Work Request" form to their immediate supervisor or manager, indicating the desire to relocate out of state.
4. **Manager Reviews Relocation Request**
   * Actor: Manager
   * Action: Review the submitted "Out-of State Work Request" form to assess the feasibility of the relocation and its potential impact on the team and agency operations.
5. **Manager Consults with Director or Designee**
   * Actor: Manager
   * Action: If the request meets initial approval, the manager consults with the Director or their designee to further evaluate the request, considering factors outlined in the policy such as job performance, staffing needs, and administrative impact.
6. **Manager Notifies Human Resources and Financial Services**
   * Actor: Manager
   * Action: Upon receiving preliminary approval, the manager notifies the Human Resources and Financial Services departments to assess tax withholding requirements, insurance, and other considerations associated with the relocation.
7. **Manager Obtains Approval from Agency Head**
   * Actor: Manager
   * Action: Obtain final approval from the Agency Head for the employee's relocation out of state, presenting the request along with relevant considerations and assessments.
8. **Manager Notifies Employee of Approval**
   * Actor: Manager
   * Action: Inform the employee of the approval to relocate out of state, specifying any conditions or requirements, and providing guidance on the next steps.
9. **Employee Initiates Relocation Process**
   * Actor: Employee
   * Action: Begin the relocation process, including arrangements for moving belongings, securing housing in the new state, and addressing any logistical considerations.
10. **Employee Updates Work Agreements**

* Actor: Employee
* Action: Ensure that updated work agreements, including telework agreements and out-of-state agreements, are on file with the appropriate departments to reflect the relocation.

1. **Employee Maintains Availability**

* Actor: Employee
* Action: Maintain availability during approved work schedule hours, adhering to Pacific Standard Time, and notifying the supervisor of any deviations or changes as outlined in the policy.

Following these steps ensures compliance with the company's policy and facilitates a structured process for obtaining approval to relocate out of state.

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