FLEXIBLE WORK OPTIONS PLAYBOOK

Guidance for flexible work decisions for non-faculty employees

Updated 1/31/2022

THE UNIVERSITY *of* NORTH CAROLINA *at* CHAPEL HILL

Operational **Excellence**

WELCOME

This playbook was developed to support equitable and consistent decision-making by providing guardrails for determining flexible work options as we embark on our journey into the Future of Work. It applies to non-faculty employees: temporary and permanent, part-time and full-time, SHRA and EHRA non-faculty.

PLAYBOOK OVERVIEW

Beyond the existing University flexible working arrangement policy, this playbook provides tools and resources to help supervisors and employees work together to determine the right approach for their team and the mission of their department.

The playbook is organized into two main sections to guide you through the process of determining flexible work plans:

- **Decision Making Framework**
- **Implementation Resources**

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Purpose and Priorities

Operational Excellence, Human Resources and Equal Opportunity and Compliance, and Finance and Operations partnered on the Future of Work project. This project is an opportunity to re-imagine work at Carolina, leveraging what the University learned during the COVID-19 pandemic. Guided by two priorities, the University seeks to support an exceptional employee experience by providing flexible work options while also upholding our world-class on-campus experience for our students.

Ensure a world-class on campus experience for our students

Ensure an exceptional employee experience to retain and attract top talent

It is important to note that there is not a one size fits all solution, so rather than taking a prescriptive approach, this playbook establishes guardrails for exploring and implementing flexible work arrangements.

Process for Flexible Work Plans

February – March 2022

Leader Initiates

Deans and Vice Chancellors consider business needs and determine steps to initiate conversations about flexible work options and communicate direction to department level supervisors.

Department Assessment

Supervisors evaluate business needs, opportunities, and individuals' functions to inform the approach to establishing flexible work arrangements for departments. Communicate plan to team.

Individual Assessment

Supervisors and employees use the playbook to identify flexible work options for individuals and complete Work Location Forms. Supervisors submit completed forms identifying tentative hybrid or remote designations, per school or unit process.

School or Unit Proposal

Deans and Vice Chancellors review department plans and submit their school or unit proposals for central review and approval.

Proposals can be submitted any time up until the March 31, 2022 deadline.

Central Approval

Proposals are evaluated by a central committee on a rolling basis. Schools and units communicate final decisions to employees. Changes to existing arrangements require at least 30-days notice. **Approved plans must be implemented no later than June 30, 2022.**

Changes beyond March 2022

Annual Review: Designations are reviewed each academic year.

Ad-hoc: Work with your HR Officer if business needs change and an individual employee's designation needs to be adjusted outside of the annual review process.

Making Equitable Decisions

As an equitable starting point for similar positions across campus, work location options were centrally determined for all job categories, in partnership with the Office of Human Resources.

- Consider impact of employee work arrangements on workload of team members.
- Provide equitable access to supervisor support, professional development, and resources to maximize employee success regardless of work location.
- Develop a plan that will provide options for staff at every level of the organization.
- For employees who must be on-site, explore creative work schedule opportunities to extend flexibility leveraging the existing Flexible Work Arrangements policy.
- Be aware of the tendency to make decisions filtered through stereotypical assumptions around protected status as defined in the University Policy Statement on Non-Discrimination
- Generally, supervisors should not be fully remote if supervising on-site employees.
- Performance evaluation of on-site, hybrid, and remote employees should be applied consistently.

Decision-Making Framework

1. Work Location Options By Job Category
2. Role Based Factors
3. Resource & Employee Based Factors
4. Work Schedule Options

Use the Work Location Form as a guide through this process and to document decisions.

STEP

1

Work Location Options by Job Category

- Work location options were defined in partnership with the Office of Human Resources, looking at the broadest range of flexibility for each job category.
  - Find your Job Category on Carolina Talent under My Profile
  - Visit the Work Location Options by JCAT list to view your work location options
- All work location options for a job category may not be appropriate for every individual in that job category. **This is the starting point.** Role based factors will be considered in the next step.
- This is designed with the majority of employees in mind. There will be some rare circumstances where greater work location options may be feasible.
  - For unique situations, an exception request with justification can be submitted as part of the school or unit plan for central review.
- Contact your HR Representative if you have questions about the work location options.

Find your Job Category on Carolina Talent under My Profile -> Additional Information, see appendix for details

STEP

1

Work Location Options - Defined

On-Site

Regularly recurring working hours are at employee's on-site duty station.

There are potential options for flexibility included in the schedule options section.

Hybrid

Regularly recurring working hours are split between working locations: on-site duty station and off-site location within reasonable commuting distance of duty station, as determined by business need.

There are many possible schedule options within this category.

Remote

Regularly recurring working hours are at an off-site location in NC. There are two remote options:

- Employee should expect to occasionally come to campus for irregularly occurring business needs (e.g., semi-annual event, in-person training).
- Generally, employee is not expected to come to campus.

STEP

2

Role Based Factors

Instructions: Review role-based factors listed below to refine options.

Positions that include any these factors **are not eligible for remote-only**. Hybrid or other flexible work schedule options may still be possible as long as business needs are met.

Role based factors

- Delivery of in-person services that require on-site presence (e.g., classroom support, on-campus events, in-person meetings with students, etc.)
- Works with physical equipment/resources or role requires operating in an on-site space (e.g., lab, clinic, library, public safety, etc.)
- Essential worker classification, as designated in ConnectCarolina

STEP

3

Resource and Employee Based Factors

Instructions: Review these additional factors to further refine flexible work arrangements within the established parameters. This step, in combination with the factors from step 2, will help inform schedule decisions.

Resource based factors

- Availability of University resources for hybrid or remote work (e.g., individual or shared laptop, phone, etc.)
  - If, after exploring options, there are no viable resource solutions, hybrid or remote work arrangements may not be feasible

Employee based factors

- If more than one work location is an option based on previous steps, employee input should be considered
- Availability of an appropriate off-site workspace
  - free of external obligations and unreasonable interruptions
  - with ability to maintain appropriate confidentiality and privacy of information, based on the nature of the employee's job function
  - with sufficient, high-speed internet

STEP

4

Schedule Options

The University operates 24/7 and schedules are driven by departmental functions. All employee schedule decisions should align with department business needs.

This section highlights existing flexible work arrangement options for all employees (regardless of work location) and provides ideas to consider for hybrid employees and teams.

Existing Options for All Work Locations

As outlined in the Flexible Work Arrangements policy

Option	Definition	Example
Adjusted Work Schedule	Non-standard hours	7am-4pm, 10am-6:30pm
Compressed Work Schedule	Employee works their assigned FTE hours in fewer days	Four 10-hour shifts Four 9-hr shifts and one 4-hr shift
Seasonal Flexibility	Different schedule or work location in the “off-season”	Remote work during academic calendar breaks

STEP

4

Schedule Options, continued

Options for Hybrid Employees

- Full or half days on/off-site
- Alternating weeks
- Other rotations to meet specific business needs

Options for Teams

- Everyone in on the same day for face-to-face meetings or activities
- Rotate days – helpful for a team providing face to face services

This is not an exhaustive list of options.
Be creative and find a solution that works best for your team.

Teams should define core hours when everyone is available, where applicable

- Meetings and other collaborative work can be scheduled during these hours
- Core hours may be different from operating/service hours (e.g., 8am-5pm service hours, 10am-3pm core hours)

Work Location Results

- Following steps 1-4, supervisors and employees determine a tentative work location designation and record results on the Work Location Form.
  - See appendix for examples of completed Work Location Forms.

On-Site	Hybrid	Remote

- Supervisors submit completed forms per school or unit process for central approval.
- Schools and units communicate final decisions and implementation plans to employees. Approved hybrid and remote employee designations are added to ConnectCarolina and reported to UNC System Office.

There is not an appeal process. If there are concerns about work location/schedule, they should be addressed within the school or unit working with the supervisor or local HR representative.

Implementation Resources

The following resources are provided to support a successful implementation of flexible work arrangements.

- Communication and Collaboration
- Guidance for Supervisors
- The Carolina Experience
- Equipment and Resources
- IT Security and Best Practices
- Relevant Policies

Communication & Collaboration

TAKEAWAY

To communicate and collaborate effectively, it is essential for teams to establish norms around how and when to connect with colleagues and campus partners. Strong communication is foundational for a successful hybrid team.

Spend time generating and agreeing upon team expectations for availability and working together, including mutual core working hours, one-on-one check-ins, and team meetings.

COMMUNICATION & ENGAGEMENT

- Each team is unique! **Include everyone's voice** in determining practical team communication and collaboration approaches to build consensus.
- Talk about communication styles and methods honestly and often and be willing to test out new ideas.
- Employees should maintain open channels of communication with supervisors and colleagues.
- Make sure your approach continues to work for everyone by checking in and sharing successes and opportunities for improvement.
- Communicate early and often about changes to schedules or work location expectations.

Recommended Training

Building Connection & Engagement in Virtual Teams

COLLABORATION

- Your campus partners may have a different approach to communication and collaboration – reach out to them to determine how they prefer working together.
- Maintain an up-to-date calendar. Communicating availability and coordinating meetings are much easier when scheduling information is accessible and accurate.

Communication & Collaboration, continued

MEETINGS

- Create practices that can be implemented across on-site, hybrid, or remote teams. Decide on a University-approved technology platform for daily and ad hoc communications as well as a platform for hosting scheduled meetings. Visit the ITS Work Remote page for more information.
- Take advantage of Office365 tools (Teams, SharePoint, etc.) to collaborate on documents in real time.

Recommended Training
Using Microsoft Office 365 products focusing on Teams, SharePoint, and OneDrive

- Develop clear expectations for virtual meeting protocols such as turning on a camera, presenting a professional appearance, and using a private workspace, free of distractions.
- For meetings with a mix of on-site and remote participants, consider hosting a virtual meeting to reduce complexity.
- Determine virtual communication etiquette such as using a chat function to check availability of a colleague before calling, checking calendars, and employing the most appropriate platform for the type of meeting you plan to hold.

Recommended Trainings
Digital Body Language
Using Zoom

The Carolina Experience

You play an integral role at Carolina! Getting acquainted with campus, even if you are working at an alternate location some or all of the time, is crucial to employee sense of belonging, a commitment to the institutional mission, and developing your own Carolina identity.

Learning about Carolina

- University mission and values
- Carolina by the Numbers
- Sense of Place Campus Tour (in-person, self-guided, or virtual)
- New employees attend the Welcome to Carolina Blue New Employee Orientation

Connecting with Carolina

- Join a campus organization
- Serve the community
- Enroll in a course
- See the Employee Forum Staff Resources page for details

IT Security and Best Practices

Working from home can be just as productive and secure as in the office with the right tools and best practices.

When in doubt, or if you encounter any difficulty navigating getting equipped for working from home, you can get help from the ITS-Service Desk, 919-962-HELP or your local IT support.

Requirements

- Follow all UNC IT security policies in consultation with IT support staff as needed.
- Ensure you keep up with software updates; don't delay them.
- Use two-factor authentication in accordance with UNC standards.
- Restrict use of university-owned computers to the employee only.

Recommendations

- Ensure your laptop is encrypted.
- Use the VPN for access to campus applications and storage locations.
- Avoid public wi-fi unless connected to the VPN.
- Have a backup plan for outages (e.g., reprioritize work, commute to campus, collaborate with a coworker on campus, etc.)
- Refrain from storing files locally on your computer.
- Avoid using personally-owned computers for university business, where feasible.
- Secure your home wi-fi router with a strong password.
- Maintain vigilance to phishing scams, avoid clicking on unknown or suspicious links.
- Use a webcam cover or unplug your webcam when not in use.
- Use a virtual background on Zoom to avoid oversharing.

Resources

- General guidance on working from remote
- Keeping your devices secure and protecting University data while working from home:
- Safe Computing at UNC provides additional guidelines for protecting your identity, device, university data and more.

Equipment & Resources

Resources are provided according to business need, so all resources may not be provided to all employees. Those decisions are independent of work location.

	On-Site	Hybrid	Remote
Workspace / duty station	Provided	Provided on-site, but individually assigned space not guaranteed if <50% on-site; Employee responsible for providing an appropriate off-site workspace	Employee responsible for providing an appropriate off-site workspace, no individually assigned space on-site
Technology	Provided	Provided for one location, according to business need	Provided at remote workspace
Office Supplies	Provided	Provided on-site	Pickup on-site or option to ship to employee, if necessary
Office Furniture	Provided	Provided on-site; employee responsible at remote location	Employee responsible
Work Phone	Provided	Provided on-site; soft phone may be used at remote location	Soft phone provided as part of campus transition to AT&T*
Internet	Provided	Provided on-site; employee responsible at remote location	Employee responsible
Transportation and Parking	Employee responsible, see transportation and parking for options		

*The transition to AT&T is an ongoing project. See your IT lead for additional info or visit the project site.

Guidance for Supervisors

Review current pilot program, if participating, and use the playbook to make updates or improvements

Recommended Approach

1. Consider **business needs** and individuals' functions to inform the approach to establishing flexible work arrangements for your department.
2. **Share** this Flexible Work Options Playbook with your team (e.g., email, staff meeting, etc.) and provide instructions to staff about next steps.
3. **Schedule** one-on-one meetings and use the playbook to identify flexible work options and complete the Work Location Form. For unique situations where business needs are best met through an option not available to the job category, work with your HR Rep to explore the exception process.
4. **Submit** completed forms for hybrid or remote plans, per school or unit process.
5. **Communicate** outcome to individuals and team after central review is complete.
6. **Implement** approved work location plans by June 30, 2022. Changes to existing arrangements require at least 30-days notice
7. **Evaluate** and refine work location plans each academic year, and as needed.

Guidance for Supervisors, continued

TIPS

- Trusting employees to effectively work remotely is key to success and productivity.
- Provide opportunities to communicate with the team and supervisor through team meetings and one-on-one check-ins.
- Consider asking employees to provide simple status reports for work completed (e.g., weekly). This can help inform team meetings or one-on-one check-ins.
- Encourage all employees to care for their well-being by making them aware of support resources, such as the Employee Assistance Program (EAP).

Supporting Employee Success

1. **Communicate performance expectations** and how the employee's performance will be measured. Performance standards must be consistent regardless of work location.

2. **Evaluate employees based on the expectations you set.** Be mindful of comparison bias, for example evaluating someone on-site as higher performing than someone hybrid or remote because you see them working.

3. If there is a performance concern, **discuss the specific concern and create an improvement plan.** For guidance, reach out to your department Human Resources or to Employee and Management Relations (emr@unc.edu).

4. Supervisors must **keep performance plans up to date** so they can be used to guide employees' work and performance. Carolina Talent is accessible by all parties and can be used to communicate expectations and assign professional development opportunities.

Recommended Trainings

- Managing Virtual Teams
- How to Be an Effective Remote Manager

Appendix

The appendix contains additional resources to support the use of the Playbook.

Glossary

Work Location Form Examples

Lookup Job Category

Relevant Policies

Glossary

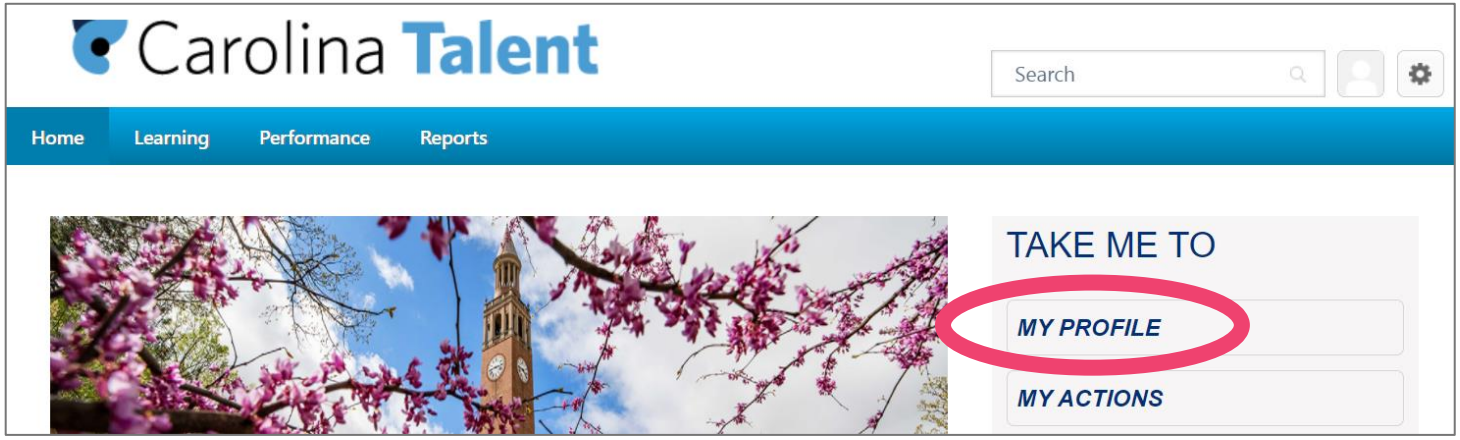
Term	Definition
Core hours	An established time period for working shared by all team members. Core hours facilitate mutual team availability to allow for team meetings, collaboration, and effective communication.
Exception	An exception refers to a request for an employee work location that extends beyond that which is centrally defined for their job category. An exception is not an appeal process, nor applies to circumstances that can be addressed by situational flexibility.
Hybrid work location	Regularly recurring working hours are split between working locations: on-site duty station and off-site location within reasonable commuting distance of duty station, as determined by business need.
Job Category (JCAT)	The UNC System Office's JCAT taxonomy groups positions and jobs into an occupational or functional area regardless of the position title, salary, etc. Due to the wide variety of position titles, JCATs allow for a narrower and more consistent analysis of occupational or functional roles across the UNC System. JCATs are available to be viewed in Carolina Talent under My Profile> Additional Information
On-site work location	Regularly recurring working hours are at employee's on-site duty station.

Glossary (continued)

Term	Definition
On-site duty station	An employee's designated on-site University work site
Remote work location	Regularly recurring working hours are at an off-site location in NC. There are two remote options: • Employee should expect to occasionally come to campus for irregularly occurring business needs (e.g., semi-annual event, in-person training). • Generally, employee is not expected to come to campus
Situational Flexibility	The option to extend ad-hoc flexibility to an employee beyond their regular working arrangement, in response to an irregularly occurring need or situation. This does not apply in circumstances when that need is best met by an existing policy, such as ADA accommodations approved by the Equal Opportunity and Compliance Office, or HR approvals under the Family Medical Leave Act.
Soft Phone	A soft phone is a software application that's installed on an internet-connected device to make and receive phone calls via that device. See the Phone Services page for more information.

Lookup Job Category

1. Visit carolinatalent.unc.edu
2. Select “My Profile”



3. Scroll down to the “Additional Information” section
4. The Job Category is listed in () after “JCAT Code”

Relevant Policies

University Policies, Standards, and Procedures

- Flexible Work Arrangements for University Employees
- Procedure for Flexible Work Arrangements for University Employees
- ADA Reasonable Accommodations for Employees, Applicants and Visitors Policy
- Policy on Prohibited Discrimination, Harassment, and Related Misconduct
- Information Technology Policies

External Regulations

- UNC System Office, Flexible Work Arrangement Policy: 300.8.6[R] - Regulation on Flexible Work Arrangement and Remote Work

Work Location Form Examples

The following pages includes examples of completed Work Location Forms for employees in the following job categories:

- Student Career Services Professional (hybrid)
- Continuing Education Professional (hybrid)
- Accounting Professional (remote)

You can download a blank Work Location Form HERE or from the Flexible Work Arrangements page.

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Work Location Form

Instructions: Supervisors and employees should use the **Flexible Work Options playbook** to identify flexible work options for individuals and complete this Work Location Form. Supervisors then submit completed forms identifying tentative hybrid or remote designations, per school or unit process. See pages 1-4 of the playbook for additional information.

Employee Name: Isabelle Pond

PID: 111111111

Job Category: Student Career Services Professional

Does this position work directly with students? Yes [X] No [ ]

Supervisor Name: Akeem Paulson

STEP 1 | WORK LOCATION OPTIONS

Look up options for your job category on the **Work Location Options by Job Category** resource. **See page 7** of the playbook for additional information.

Results for Step 1

Based on the Work Location Options resource, enter the work locations available to your job category.

On-Site	Hybrid	Remote
X	X	

STEP 2 | ROLE BASED FACTORS

Role based factors further refine eligibility for work locations (page 9).

Select all the role based factors that apply.

- [X] Delivery of in-person services that require on-site presence (e.g., classroom support, on-campus events, in-person meetings with students, etc.)
- [ ] Essential worker classification, as designated in ConnectCarolina
- [ ] Works with physical equipment/resources or role requires operating in an on-site space (e.g., lab, clinic, library, public safety, etc.)

Results for Step 2

Roles that include any of the above factors **are not eligible for remote-only work locations.** Hybrid may still be an option if business needs are met.

Check the options that remain available. If no role based factors were selected, carry forward your results from step 1.

On-Site	Hybrid	Remote
X	X	

STEP 3 | RESOURCE & EMPLOYEE FACTORS

This step, in combination with the factors from step 2 will help inform schedule decisions (page 10).

1. Are university resources available for hybrid or remote work (e.g., individual or shared laptop, soft phone, etc.)? Yes [X] *No [ ]

***If, after exploring options, there are no viable resource solutions, hybrid work arrangements may not be feasible.**

2. Which of the options identified in Step 2 does the employee prefer? On-Site [ ] Hybrid [X] Remote [ ]

Clear Page

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Work Location Form

STEP 3 | RESOURCE & EMPLOYEE FACTORS - continued from page 1

3. If employee prefers hybrid or remote, can the employee identify an available off-site workspace that includes **all** of the following criteria: Yes ☒ *No ☐

- is free of external obligations and unreasonable interruptions
- is conducive to maintaining appropriate confidentiality and privacy of information related to job functions
- has sufficient, high-speed internet

***If no is selected, hybrid or remote work arrangements may not be feasible.**

STEP 4 | TENTATIVE EMPLOYEE SCHEDULE

See pages 11 -13 of the playbook for additional information.

Work Location Results
Review the results from the steps above and select the employee's work location.
Only 1 option should be selected.

On-Site	Hybrid	Remote
☐	☒	☐

% of work on-site (round to the nearest 10%)**:** 60%

Examples: On-site = 100%
3 days on-site = 60%
Remote = 0%

Work Schedule:

On-site - Mon, Wed, Fri
Remote - Tue, Thu
Hours: 7am - 4pm

Summary of discussion (optional)**:**

Team will rotate on-site days to provide coverage for in-person appointments. The team member working remote will cover virtual appointments.

By signing, we acknowledge that we have reviewed the guidance provided in the playbook to determine a tentative work location designation.

Signature of Employee: *Isabelle Pond* **Date:** 2/24/22

Signature of Supervisor: *Akeem Paulson* **Date:** 2/24/22

Work locations should be reviewed no less than once per year and updated if needed.

Email Completed Form

Clear Page

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Work Location Form

Instructions: Supervisors and employees should use the **Flexible Work Options playbook** to identify flexible work options for individuals and complete this Work Location Form. Supervisors then submit completed forms identifying tentative hybrid or remote designations, per school or unit process. See pages 1-4 of the playbook for additional information.

Employee Name: Zhanna Watt

PID: 555555555

Job Category: Continuing Education Professional

Does this position work directly with students? Yes ☐ No ☒

Supervisor Name: Vanessa Tupper

STEP 1 | WORK LOCATION OPTIONS

Look up options for your job category on the **Work Location Options by Job Category** resource. **See page 7** of the playbook for additional information.

Results for Step 1

Based on the Work Location Options resource, enter the work locations available to your job category.

On-Site	Hybrid	Remote
X	X	X

STEP 2 | ROLE BASED FACTORS

Role based factors further refine eligibility for work locations (page 9).

Select all the role based factors that apply.

- ☒ Delivery of in-person services that require on-site presence (e.g., classroom support, on-campus events, in-person meetings with students, etc.)
- ☐ Essential worker classification, as designated in ConnectCarolina
- ☒ Works with physical equipment/resources or role requires operating in an on-site space (e.g., lab, clinic, library, public safety, etc.)

Results for Step 2

Roles that include any of the above factors **are not eligible for remote-only work locations.** Hybrid may still be an option if business needs are met.

Check the options that remain available. If no role based factors were selected, carry forward your results from step 1.

On-Site	Hybrid	Remote
X	X	

STEP 3 | RESOURCE & EMPLOYEE FACTORS

This step, in combination with the factors from step 2 will help inform schedule decisions (page 10).

1. Are university resources available for hybrid or remote work (e.g., individual or shared laptop, soft phone, etc.)? Yes ☒ *No ☐

***If, after exploring options, there are no viable resource solutions, hybrid work arrangements may not be feasible.**

2. Which of the options identified in Step 2 does the employee prefer? On-Site ☐ Hybrid ☒ Remote ☐

Clear Page

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Work Location Form

STEP 3 | RESOURCE & EMPLOYEE FACTORS - continued from page 1

3. If employee prefers hybrid or remote, can the employee identify an available off-site workspace that includes **all** of the following criteria: Yes ☒ *No ☐

- is free of external obligations and unreasonable interruptions
- is conducive to maintaining appropriate confidentiality and privacy of information related to job functions
- has sufficient, high-speed internet

***If no is selected, hybrid or remote work arrangements may not be feasible.**

STEP 4 | TENTATIVE EMPLOYEE SCHEDULE

See pages 11 -13 of the playbook for additional information.

Work Location Results
Review the results from the steps above and select the employee's work location.
Only 1 option should be selected.

On-Site	Hybrid	Remote
☐	☒	☐

% of work on-site (round to the nearest 10%)**:** 40%

Examples: On-site = 100%
3 days on-site = 60%
Remote = 0%

Work Schedule:

The two days of the week worked on-site will vary, based on the needs of current projects.
Hours: 8am-5pm

Summary of discussion (optional)**:**

By signing, we acknowledge that we have reviewed the guidance provided in the playbook to determine a tentative work location designation.

Signature of Employee: Zhanna Watt **Date:** 3/4/22

Signature of Supervisor: Vanessa Tupper **Date:** 3/4/22

Work locations should be reviewed no less than once per year and updated if needed.

Email Completed Form

Clear Page

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Work Location Form

Instructions: Supervisors and employees should use the **Flexible Work Options playbook** to identify flexible work options for individuals and complete this Work Location Form. Supervisors then submit completed forms identifying tentative hybrid or remote designations, per school or unit process. See pages 1-4 of the playbook for additional information.

Employee Name: Satish Reeve

PID: 123456789

Job Category: Accounting Professional

Does this position work directly with students? Yes ☐ No ☒

Supervisor Name: Joel Robertson

STEP 1 | WORK LOCATION OPTIONS

Look up options for your job category on the **Work Location Options by Job Category** resource. **See page 7** of the playbook for additional information.

Results for Step 1

Based on the Work Location Options resource, enter the work locations available to your job category.

On-Site	Hybrid	Remote
X	X	X

STEP 2 | ROLE BASED FACTORS

Role based factors further refine eligibility for work locations (page 9).

Select all the role based factors that apply.

- ☐ Delivery of in-person services that require on-site presence (e.g., classroom support, on-campus events, in-person meetings with students, etc.)
- ☐ Essential worker classification, as designated in ConnectCarolina
- ☐ Works with physical equipment/resources or role requires operating in an on-site space (e.g., lab, clinic, library, public safety, etc.)

Results for Step 2

Roles that include any of the above factors **are not eligible for remote-only work locations.** Hybrid may still be an option if business needs are met.

Check the options that remain available. If no role based factors were selected, carry forward your results from step 1.

On-Site	Hybrid	Remote
X	X	X

STEP 3 | RESOURCE & EMPLOYEE FACTORS

This step, in combination with the factors from step 2 will help inform schedule decisions (page 10).

1. Are university resources available for hybrid or remote work (e.g., individual or shared laptop, soft phone, etc.)? Yes ☒ *No ☐

***If, after exploring options, there are no viable resource solutions, hybrid work arrangements may not be feasible.**

2. Which of the options identified in Step 2 does the employee prefer? On-Site ☐ Hybrid ☐ Remote ☒

Clear Page

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Work Location Form

STEP 3 | RESOURCE & EMPLOYEE FACTORS - continued from page 1

3. If employee prefers hybrid or remote, can the employee identify an available off-site workspace that includes **all** of the following criteria: Yes ☒ *No ☐

- is free of external obligations and unreasonable interruptions
- is conducive to maintaining appropriate confidentiality and privacy of information related to job functions
- has sufficient, high-speed internet

***If no is selected, hybrid or remote work arrangements may not be feasible.**

STEP 4 | TENTATIVE EMPLOYEE SCHEDULE

See pages 11 -13 of the playbook for additional information.

Work Location Results
Review the results from the steps above and select the employee's work location.
Only 1 option should be selected.

On-Site	Hybrid	Remote
☐	☐	☒

% of work on-site (round to the nearest 10%)**:** 0%

Examples: On-site = 100%
3 days on-site = 60%
Remote = 0%

Work Schedule:

M-F, 10am-7pm
Can be available for morning meeting as needed.
Will attend the annual planning retreat in-person.

Summary of discussion (optional)**:**

By signing, we acknowledge that we have reviewed the guidance provided in the playbook to determine a tentative work location designation.

Signature of Employee: Satish Reeve **Date:** 3/7/22

Signature of Supervisor: Joel Robertson **Date:** 3/7/22

Work locations should be reviewed no less than once per year and updated if needed.

Email Completed Form

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