

MANAGER TOOLKIT

Assessing Remote Workers



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Determining Remote Work Arrangements

Managers provide guidance, support, training, and organization to ensure employees can perform their jobs. They use University resources wisely to deliver results effectively. Managers are also responsible for meeting the goals of their business units and departments. Remote work arrangements can help managers meet their goals in many ways. This step-by-step guide is designed to aid managers in determining whether remote work is an option for their employees.

Step 1: Decide if a Position or Task is Amenable to Remote Work



On-Site Positions

Certain jobs must be performed on-site. These questions can aid managers when assessing if a position is on-site:

- Does the job deliver a product or service that requires on-site presence?
- Do the job duties require providing in-person services to customers?
- Does the job support a leader who works exclusively on campus?



Hybrid Positions

Some positions rely on teamwork or require an individual's presence to provide services. These positions may share job responsibilities or rely on another team member to accomplish a task. With a little creativity, a surprising number of jobs can be performed in new ways that may not be evident at first.

Managers can ask these questions when considering a hybrid approach:

- Do we need multiple employees in this job to cover office responsibilities?
- Do employees in the department share tasks?
- Are some of the key tasks for this job tied to the office location?
- Are aspects of the job able to be performed remotely?
- Can an employee perform tasks independently?
- Is there enough work to fill an 8-hour workday at least once a week?
- Are there job aspects which require interaction with students, faculty, and staff on campus?
- Can data and files be securely maintained from a remote location?
 - Are there vendors or other UTA department representatives who deliver products and services to the work location regularly?
- Do the daily work tasks of this job interact with the public in person?



Remote Positions

Not all jobs are amenable to remote work. Managers should review the job description before deciding if a position is eligible for remote work.

Positions that may be suitable for full-time remote work are usually based on computer usage with limited or no interaction with customers (except via Microsoft Teams or Zoom.) Jobs like these could be adapted for remote work.

Consider these questions to determine if a job is suitable for remote work:

- Can all job tasks be completed remotely?
- Can services to students, faculty, and staff be provided with excellence from a remote location?
- Can the employee complete the same amount of work while remote?
- Can the employee perform tasks solely from a computer or mobile device?
- Can the employee interact with other team members and/or customers, utilizing Microsoft Teams without the need for on-campus meetings?
- Can the job duties be performed independently?
- Can data and files be securely maintained from a remote location?

Step 2: Decide if the Employee Best Fits Hybrid or Remote Work

Remote work is not an entitlement. Managers should keep in mind an employee's performance history when determining whether they are suited for remote work.

The following questions can aid managers in making this determination:

- How much on-site supervision, oversight, or direction is needed for this employee?
- Can the employee work independently and be self-directed to accomplish tasks?
- Does the employee need to demonstrate competency in a critical area before such an arrangement can be approved?
- How can I help this employee succeed if this schedule is approved?
- Can the employee complete the same amount of work while working remotely?
- Is the employee results-oriented and comfortable setting priorities and deadlines?
- Is the employee an effective communicator? Do they take initiative?
- Is the employee adaptable to changing routines and environments?
- Was this employee effective and productive working remotely with others in 2020?
- Did the employee receive a “meets expectation” or “solid performer” rating or above on their previous two performance reviews?
- Has the employee had any formal corrective action taken within the last two years?
- Would working remotely improve employee satisfaction, engagement, and morale?

Step 3: Ensure the Plan is Equitable

Next, managers should assess whether the plan is equitable and consistent.

Questions to consider when determining if a plan is equitable include:

- Were you consistent in applying steps 1 and 2 when planning which employees may work using a hybrid or remote model?
- Are you treating all those in the same job classification the same?
- If not, is this due to past performance issues or a history of corrective action?
- If not, is this because the employee had trouble working remotely in the past?
- Are you treating employees with different ethnic and gender backgrounds the same?
- If not, is this due to past performance issues or a history of corrective action?
- If not, is this because the employee had trouble working remotely in the past?
- Have you shared your plan with your department leadership (director, dean, and/or vice president) to ensure equity is being applied across the division or college?

Step 4: Consider How to Manage Hybrid and Remote Employees

Managers should consider how they will manage and assess performance for hybrid and remote employees.

The following questions can guide managers in making these decisions:

- How will you assign work and distribute tasks?
- How will you judge whether productivity is higher, lower, or unaffected?
- How often will you check in with hybrid and remote employees?
- How much travel is required to do the job? Are the travel demands of the job aligned with the hybrid or remote arrangement?
- How will you set expectations around collaboration and interactions?
- How will communication be affected by the work arrangement?
- Consider communication between the employee and your customers.
- Consider communication between co-workers, supervisors, and staff.
- Have you established and reviewed expectations with your employees?
- How will you communicate which employees can work hybrid or remotely?

Step 5: Review the Remote Work Agreement with the Employee

Once the previous steps have been completed, managers should discuss and review the [Remote Work Agreement](#) with the Employee.

The following steps are provided to begin finalizing the work arrangements:

- Review the hybrid or remote work agreement and policies with employees.
- Ensure the supervisor and employee sign the agreement.
- Send a copy of the signed agreement to Human Resources at askhr@uta.edu.
- Review the FAQ.

Step 6: Follow-Up with Online Training

Employees should review online training to understand expectations.

Information regarding training will be provided in the coming weeks.



Hybrid or Remote Work Expectations

Template Overview

The following template provides an example of ways to set expectations regarding hybrid and remote work.

Managers should use this to set expectations regarding scheduling, requesting leave, indicating status, and communicating with peers and customers.

Managers should add department-specific information to this template as needed.



[Click to access an editable version of the template.](#)

Template Example

All team members should follow these guidelines for hybrid and remote work to help keep our team organized, informed, and productive.

Scheduling

- Follow the schedule documented in the [Remote Work Agreement](#).
- Schedule changes during a workday must be pre-approved by your manager. Keep other staff updated using the office Outlook Calendar.
- Working extra hours may be permitted as business needs dictate and must be pre-approved by your manager. See the Human Resources tile on the [UTA Policies and Procedures website](#) for more information.

Requesting Leave

- Make requests two weeks in advance using our timekeeping system.
- Call your manager directly if you need to take leave unexpectedly.
- See the [Sick Leave Policy](#) for guidance about illness that exceeds 3 days.
- Update your Outlook and Teams status before closing your computer.

Indicating Status

- Set an out of office status for any time you are away during operating hours.
- Include a point of contact and the date and time when you will return in the out of office status message.
- When stepping away for a break or lunch, change your Teams status to “Appear away” and notify your team members (if applicable).

Communicating with Peers and Customers

- Always keep your camera on and mute your microphone as needed.
- Post a note in the Teams Chat if you need to exit a meeting unexpectedly.
- Keep your on-camera workspace neat and business-friendly. Use a physical or [virtual background](#) if necessary.
- Ask meeting participants for permission before recording meetings.
- Follow up with customers within 24 hours.
- Check your email, Teams Chat, and voicemail several times daily.
- Take breaks from your work area. Take a walk or have a snack.
- Let your team members know when you step away and when you return.



Frequently Asked Questions: Returning to Normal Business Operations

Childcare and Elder Care

Is it acceptable to work remotely on a block schedule (for example, 3 hours work, 2-hour break, 3 hours work, 1 hour lunch, 2 hours work) so I can manage child and elder care needs?

If your job is approved for remote work, you may ask your manager about flexible work schedule options, but providing service to our students, faculty, and staff takes precedence over personal needs.

I cannot find childcare or elder care. May I work from home?

Most schools and elder care businesses will be resuming on-site operations by fall 2021. UTA's expectation is that this is a personal concern and should be taken care of utilizing vacation or sick leave, as applicable. The job tasks will be the first category for consideration when deciding to offer remote work arrangements, not personal needs.

 **Age**

I am over 65 years old. In previous Repopulation plans, I could work from home due to my age and high risk of getting COVID-19. Why can't I use my age as support for working remotely now?

UTA provided great flexibility during the COVID-19 pandemic. As we return to normal business operations, age alone is not considered a disability under the Americans with Disabilities Act/Amendments Act (ADA/ADAAA) and would not qualify you for a workplace accommodation to work from home.

UTA encourages employees who have a disability to contact the Office of Human Resources and the ADA/ADAAA Coordinator or ADA/ADAAA Liaison for assistance or to request accommodations.

 **Family Member with a Medical Condition**

My family member is over 65 years old and has a medical condition which could be exacerbated if I contract COVID-19 at work. May I work from home?

UTA provided great flexibility during the pandemic. As we return to normal business operations, it is imperative that requests to help or care for a family member with a serious health condition be filed as a request for Family and Medical Leave (FMLA).

If approved, FMLA allows you to take time off work to care for your family member. It will not provide approval for you to work remotely to avoid possibly contracting COVID-19 at work.

 **ADA and ADAAA Accommodations**

My doctor recommended some possible accommodations for my medical condition. May I also request to work remotely?

Workplace accommodations are granted to assist an employee to perform the essential duties of the job. If the doctor recommends remote work as a possible accommodation, then it will be reviewed during conversations with Human Resources, the employee, and the manager.

 **Illness**

I am sick or recovering from a contagious illness. I can work but cannot be around people. May I work from home temporarily and save my leave?

Situations will be reviewed on a case-by-case basis with the manager, and the manager must grant approval before this temporary remote work option begins.

I must self-isolate or quarantine due to having COVID-19 or being in close contact with someone who has COVID-19, or because I returned from international travel and need to quarantine for a period of time.

What are my options?

If you are feeling ill, use sick leave until you can return to work. If you are not feeling ill, ask your manager if you may work from home during your isolation/quarantine period. If you are not able to perform your job from home, then you will need to use vacation time until you are released.

UTA continues to require employees to report these situations using the [Close Contact or Personal Diagnosis \(COVID-19\) form](#) on the [COVID-19 website](#).



Remote Work

Will my benefits change if I work remotely? No.

What are the boundaries of my workspace for Worker's Compensation Insurance (WCI) purposes?

The employee and manager will define the area where work will be performed.

Should I file with WCI if I injure myself while working remotely? Yes.

Will remote work opportunities be restricted to full-time employees? No.

Will I be able to complete my timesheet while working remotely?

Yes. TCP will allow multiple ways to clock in/out starting Fall 2021.

May an eligible Classified employee earn comp time from home? Yes.

I want to purchase an item for work to use at my remote work location. Is that acceptable?

All purchases must be pre-approved.

Why must I only restrict my remote work location to Texas? My job is going to be a permanent remote work position.

UTA administration made the decision to restrict remote work locations to the state of Texas only, local and state tax implications being a major reason. All requests to switch to an out-of-state remote work location must be approved by your Director/Dean/Vice President and the Chief Human Resources Officer.

May I hire a new employee to work remotely starting Day 1?

Yes, but this type of request must be reviewed with your Director/Dean/Vice President and the Chief Human Resources Officer.



Having Difficult Conversations

Overview

As a manager, you are the connector between your team and the University. Your job is to find ways to create balance and set the tone for how your team works together.

To do this, it is important to remain neutral even in difficult conversations and situations. This means being empathetic and listening to other points of view while ensuring you are delivering a clear message.

Each situation is unique and will require individualized attention. The following tips can be used as starting points for challenging conversations.

See the [HR Training Website](#) for additional support on navigating difficult conversations.

Tips for Navigating Difficult Conversations

Deliver the Core Message

- Gather the facts. Ask yourself, “What is my core message? What do I hope this person takes away from the conversation?”
- Practice your conversation. Write out talking points for reference.
- Get straight to the point. Deliver your core message in a brief, succinct statement.
- State the facts.
- Keep your emotions in check.

Provide Context

- Be able to explain the “why” without straying from your core message.
- Continue to support the decision and maintain your position.
- Own the decision.

Listen to Understand

- Once you’ve made a clear statement of the core message, invite the employee to share and respond to what you have said.
- Focus on listening more and talking less.
- Allow time for the individual to ask questions, share feelings, or express frustration.
- Be curious and ask open questions to explore their story, such as “How do you see it?” or “What leads you to say that?”
- After the individual has expressed their side of the story, clarify what they have said if needed. For example, “I want to make sure I understand you. You said _____. Could you explain _____ further?” or “Can you elaborate on _____?”

Acknowledge and Validate

- Acknowledge their point of view. Acknowledgment is different from agreement. You can say “This sounds really important to you” without saying that you agree with their position.
- Acknowledge that there may be differences in how you see things.
- Acknowledge the employee’s feelings using empathy. For example, “I can see this is hard for you” or “It’s OK to be upset about this.”

Take Next Steps

- End the conversation by focusing on the future and how to move on from the decision or information.
- Reaffirm the core message if needed.

Putting These Tips Into Action

The following example shows how to frame a difficult conversation around not granting an employee the ability to work remotely.

Deliver the Core Message

“I have finished evaluating positions on our team to work remotely. Based on this evaluation, your position will not be working remotely.”

Provide Context

“I reviewed the team and individual performance metrics and goals.

“This decision is based on _____. (for example, performance, business needs, et cetera) that you will not work remotely.”

Listen to Understand

“I want to make sure I understand you. You said, ‘_____.’

“Could you explain this further?” Or, “Can you elaborate on X?”

Acknowledge and Validate

“I can understand that you are _____ (disappointed, upset, frustrated).

“From what you have told me, I understand that you are _____ (disappointed, upset, frustrated, et cetera.)”

Take Next Steps

“I appreciate your understanding of this situation or decision to end your ability to work remotely. Let’s continue to work through this.

“This transition will be effective _____.

“Please let me know how I can make this a smooth transition.”



Appendix

Manager Workflow

The Manager Workflow Chart on [page 16](#) is a visual map of the step-by-step guide. The workflow is designed to aid managers in completing the [Remote Work Agreement](#).

Employee Infographic

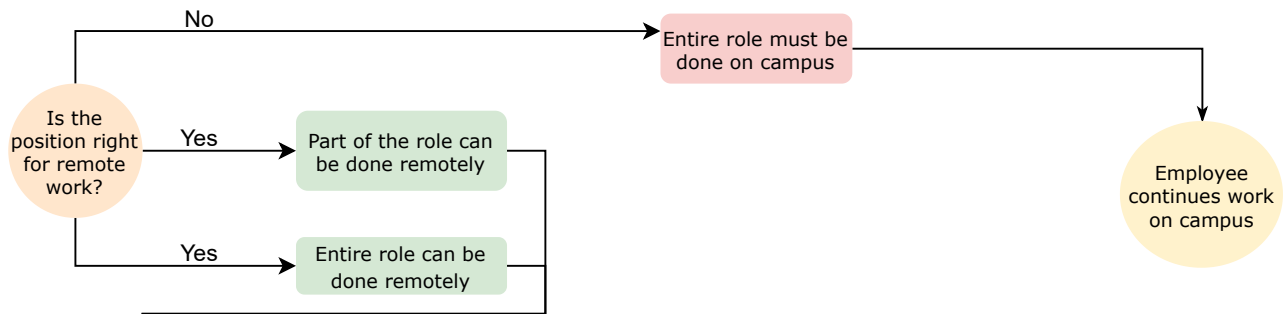
The infographic on [page 17](#) is for employees and presents what is being considered. This can be distributed to employees or posted in offices.

Additional Resources

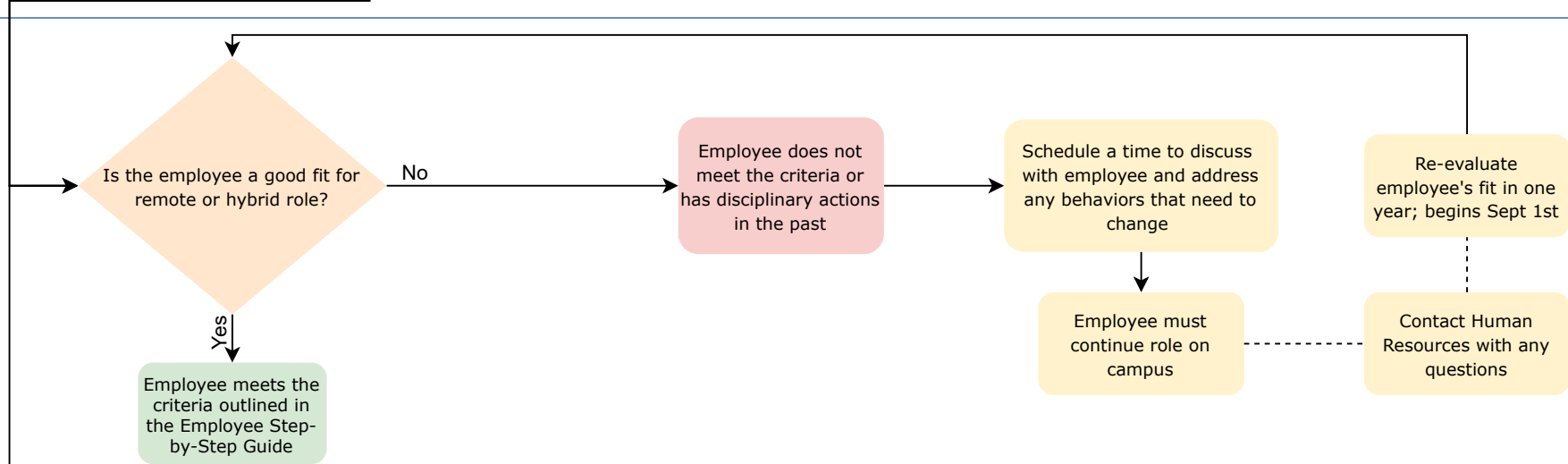
- [Remote Work Agreement](#)
- [Staff Remote Work Policy](#)
- [Expectations Template](#)
- [Remote Work Strategies for Successful Mavericks Video](#)
- [UTA COVID-19 Information](#)
- [OIT Return to Work Website](#)
- [OIT Return to Work Video](#)
- [OIT Teams Virtual Backgrounds](#)
- [UTA Policies and Procedures](#)
- [Office of Human Resources](#)
- [HR Training](#)

Remote Work Flow Chart

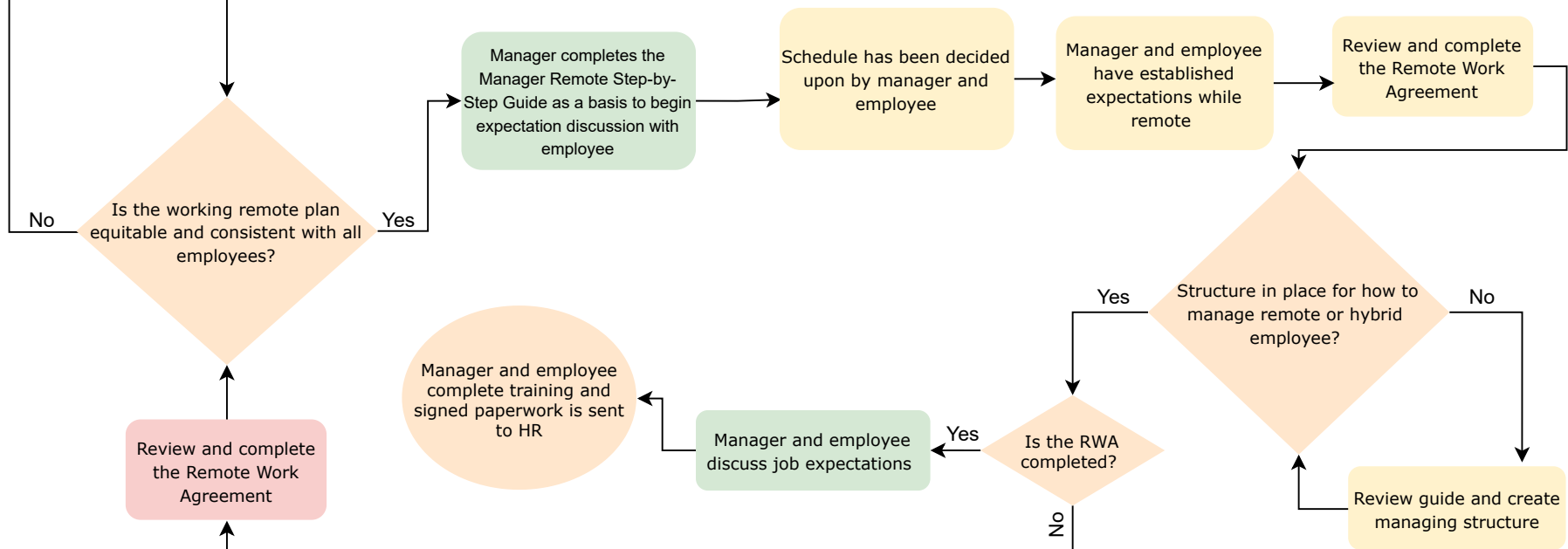
Position Review



Employee Review



Equitability - Expectation - Agreement



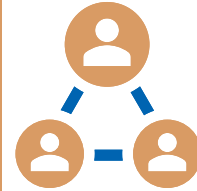
WILL I WORK REMOTELY?

The New Normal

The previous year required adjustments in how and where we work. As things return to normal, many employees have questions about what is changing and where work will take place. In the coming weeks, your supervisor will review the guidelines provided by the Office of Human Resources to assess each job role. This infographic provides a look into what should be considered.

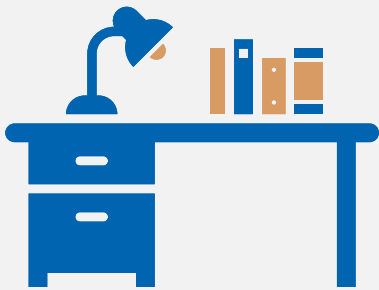
POSITION ASSESSMENT

Supervisor assesses eligibility for remote work based on employee position and job tasks.



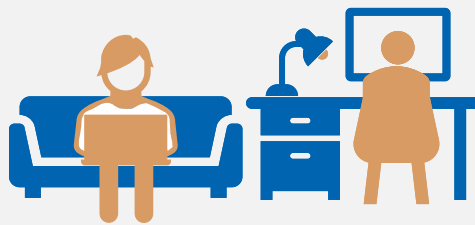
ON-SITE

- This role delivers a product or service that requires an on-site presence.
- This role requires in-person services or provides support for a leader who works exclusively on campus.



HYBRID

- Some aspects of this role can be done remotely and tasks can be performed independently.
- Job tasks are shared between Employees within the department.
- Presence is required on campus at times to provide a service to customers.



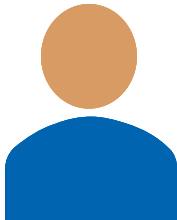
REMOTE

- Tasks can be performed remotely with very high levels of independence.
- Data is stored securely and services to customers can be solely provided off campus.



EMPLOYEE ASSESSMENT

- Able to perform all job tasks with minimal supervision
- Is an effective communicator who self-manages time by prioritizing meetings and deadlines.
- Meets or exceeds performance with no corrective action in the past.



In the coming weeks, your supervisor will be reviewing the guidelines outlined by Human Resources and assessing each position and role. Consider the information provided and prepare for being an on-site, remote or hybrid employee. We want to thank you for working hard this last year to make UTA thrive in a difficult time. We hope to see you soon!



Office of Human Resources

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