Employee Checklist for Completing a Remote Work Agreement (RWA)

The UW—Madison Remote Work Agreement (RWA) includes questions and attestations which require you to provide specific information about your plans for working remotely in Wisconsin, out-of-state, or internationally. Some of this information will be easy to provide, while some may require extra time to gather before completing the agreement.

This checklist is intended to provide information, guidance, and potential action steps to help you prepare for successful completion of your RWA.

Before gathering information for your RWA, please read and consider the five questions below.
If you answer "yes" to any of these, do *not* begin gathering information or proceed to the checklist until you have followed the guidance provided here:

1. Are you seeking **workplace flexibility** rather than remote work?

   If yes, you do not need to fill out an RWA. Review the definitions of "remote work" and "workplace flexibility" in the Remote Work Policy.

2. Are you considering the RWA as a way to obtain an **ADA (medical) accommodation(s)**?

   If yes, please reach out to the Divisional Disability Representative (DDR) in your School/College/ Division (S/C/D).

3. Are you seeking to work from an international location and needing confirmation of approval from your S/C/D's Dean/Director/Vice Chancellor for the **business necessity** requirement?

   - If yes, discuss with your manager/department chair who can escalate to HR.
   - Note: Examples of international RWAs that do *not* meet the definition of business necessity include (but are not limited to) vacation, personal illness, disability, family caregiving obligations, and other personal reasons.

4. Are you seeking to work remotely from an international location that is considered an **E:1/E:2 embargoed country**?

   - If yes, email the Offices of Export Control and Cybersecurity before moving forward.

5. Are you a **foreign national** working at UW–Madison requesting to work remotely off campus?

   - If yes, and you are an international faculty or staff member, please contact International Faculty and Staff Services (IFSS) before moving forward. [If you are an international *student*, please contact your HR department instead.]

   - **As of 07/12/23**: The U.S. Department of State, the federal agency responsible for managing the J-1 program, updated remote work authorization guidance for J-1 scholars. If you currently work remotely more than 40%, create a new agreement *as soon as possible.* You must work on campus at least 60% to be compliant with updated immigration status regulations.

Employee Checklist

Use this checklist to prepare for successful completion of your Remote Work Agreement (RWA):

1. Make sure your address is updated in MyUW > Personal Information > "Update my personal information."
   - When you log on to MyUW and authenticate your ID using MFA DUO, your employee information will appear automatically.
   - Your remote work address(es) currently entered into HRS will populate here. When you choose address type (HOME or PERMANENT), the corresponding address will populate based on what is listed in HRS.
     i. Home address is the default remote work address. You'll use a drop-down menu to choose a different address if needed, and can add up to three remote work addresses in one RWA.
     ii. You'll be able to update a home or mailing address—but if you need to select an address for your RWA that has not yet been entered into HRS, you'll need to contact your local HR to add that address to HRS. Once the new address is in HRS, it can be used in your RWA.
     iii. Note: RWAs require a *physical* location. RWA addresses cannot be mail service addresses (e.g., a PO Box, UPS box).
   - If you have multiple jobs at UW, you'll select the correct job under "Working Title."
     i. A separate Remote Work Agreement is required for each job when working remotely.

- [ ] Identify with your supervisor the start/end review dates for your RWA. It is critical that the dates you enter have been approved by your supervisor. Note that the policy requires an annual review at minimum.

- [ ] Determine the type of schedule that best reflects your work arrangement.
  - **General Hours** - select this if your start and end times will be consistent from day to day and you are working from only one remote location. Determine the average percentage of the total time you will work both remotely *and* onsite. You must record these percentages as integers (whole numbers), and these percentages must total 100%.
  - **Daily Chart -** select this to specify different work hours or remote work locations depending on the day of the week. Work with your supervisor to determine your work schedule to record this information on the agreement.

- [ ] Discuss with your supervisor the expectations/requirements for attending meetings, training, or other onsite events outside of your set remote work schedule. You will need to enter this information in your RWA, if applicable.

☐ If you are requesting remote work from an international location, be prepared to document your job responsibilities/duties in writing—**OR**—if you have a copy, by attaching your most current Position Description (PD) or Position Vacancy Listing (PVL). If you write in a description, please be specific (e.g., instead of "research," list the *type* of research that you do).

☐ Create a list of the equipment you will use when working remotely among the categories below:
- **UW–Madison-owned hardware** (e.g., computer equipment, external drives, instruments)
- **UW–Madison-owned communication resources** (e.g., mobile devices, tablets)
- Office Equipment provided to you (not including computer equipment) (e.g., office chairs, standing desks)
- **Employee-Owned Hardware, Communication Resources, and Office Equipment used in Remote Work** (e.g., items that store/manipulate data such as computers and flash drives—but NOT routers/modems, monitors, nor personal mobile devices for *occasional* email use). Please reference [Protecting Data - Technical IT Staff](#) and [Approved Tools for Exchanging and/or Storing Protected Health Information (PHI)](#).
  - The Office of Compliance does not recommend using personal devices** to access restricted data, including protected health information (PHI). Use of personal devices for the access of restricted data poses significant risks to the security of the data both in transmission and storage. The Office of Compliance recommends using University owned or managed devices for accessing restricted data. Your school/college/division will assume the additional risk associated with employee use of personal devices.
  **This does *not* refer to occasional use of mobile devices, tablets, etc.
- **Additional equipment**, if applicable
- S/C/D reimbursable expenses that have received prior approval, if applicable

☐ Be prepared to attest that your workspace is safe and functional per the following:
- Your workspace is set-up per this [Workspace Checklist](#), and as needed, use the [Ergonomics: A Guide to Setting Up Your Computer Workstation](#) resource, to make any recommended modifications.
- Your remote work location has smoke and fire detectors installed and operating; is free from recognized fall hazards; and you have a plan for seeking shelter during weather emergencies.

☐ Review the descriptions of [UW–Madison's four data classification categories](#) or the [Data Classification Policy](#) to determine the type(s) of data you work with. You must select at least one, and all that apply:
- Public Data
- Internal Data
- Sensitive Data
- Restricted Data
  - Personal Health Information (PHI)

☐ Be prepared to attest that you will comply with the policies below in order to (1) maintain a safe and secure work environment at all times, (2) protect the privacy, security, confidentiality, and integrity of data, files and other materials you use in the course of your work, and (3) report the loss of any personal device that you'll use for remote work.
- [Regent Policy Document 25-3: Acceptable Use of Information Technology Resources](#)

- UW–Madison's Division of Information Technology (DoIT) guidelines for securing a remote workstation
  - UW–Madison's Office of Cybersecurity and Office of Compliance policies
  - Incident Reporting and Response Policy

If you intend to work remotely outside of the U.S. (at least part of the time), you will also need to consider the following before completing your RWA:

- ☐ "Business Necessity" is required for international remote work. You must obtain this approval from your school/college/division's Dean, Director or Vice Chancellor *before* completing your RWA. If business necessity has *not* been approved, discuss with your manager/department chair who can escalate to HR.
  - Examples of international RWAs that do not meet the definition of business necessity include but are not limited to vacation, personal illness, disability, family caregiving obligations, or other personal reasons.
  - If you answer YES to "Approved by S/C/D Dean, Director, or Vice Chancellor as Business Necessity?" then you will be required to document the reason for business necessity.

- ☐ Contact the Export Control Office; be prepared to answer the following questions on your RWA:
  - Is an export license required for you to conduct this work internationally? To check before answering, read Export Control | Research (click on **licenses**).
  - Will your remote work be conducted from a U.S. government E:1/E:2 country? (click on **E:1/E:2 country**)
  - Does your job require that you access information that is Export Controlled under the International Trafficking in Arms Regulations (ITAR) or Export Administration Regulations (EAR)?
  - If you answer YES to any of the above, you must email the Offices of Export Control and Cybersecurity before completing your RWA because, in some cases, special licenses are required from the federal government, and licenses can take several months to obtain or may be denied altogether.

- ☐ If your work involves sponsored projects overseen by Research & Sponsored Programs (RSP), and you intend to work remotely from an international location, discern (in conjunction with your supervisor/PI/department/division) whether you are paid on any of these funds: Fund 133, 143, or 144 (managed by RSP) or 142 (managed by CALS). You will need to document this on the agreement, along with the project or award number(s). Your PI/department is advised to email RSP as soon as possible with the Award ID/Project ID so RSP can review the terms and conditions of the award. (The PI/department or you can access the award agreement with the sponsor via WISER on the Documents tab. This lists all terms, conditions, and sponsor regulations that the PI and UW–Madison must adhere to.)
  - In some cases, the project sponsor may need to approve your remote work, and obtaining this approval can take a month or more. In these cases, remote work cannot be approved until the sponsor approves.
  - If the award requires sponsor approval for international remote work, Research and Sponsored Programs (RSP) will work with the PI/department/division to prepare a request. RSP will contact the sponsor to request permission for you to work remotely.
  - In cases where sponsor approval is required, your division should ensure sponsor approval is obtained prior to approving remote work.

☐ If you are a foreign national seeking to work remotely from an international location, you are required to provide the Office of Human Resources Payroll Office documentation to ensure that you are appropriately taxed when working outside the U.S., and that you receive the correct tax reporting documents at year end. See the Foreign Source Income website. This alone will not delay the approval of your agreement but is a required follow-up for you and the Office of Human Resources (OHR) Payroll.

☐ **To complete the agreement***: Go to MyUW > Personal Information > "Update my personal information."

☐ You may notice that as you are completing the agreement, the system may pause to process your prior inputs. You will need to pause before continuing to enter information when that happens.