

Flexible Work Arrangement Overview: Process Summary

This document gives a simple overview of how to request and approve a Flexible Work Arrangement (formerly referred to as a Remote Work Agreement) in Workday. It outlines the key steps, explains what happens at each step, and shows who is involved.

Step 1: Initiate Request for Flexible Work Arrangement

Users: Employee as Self, Contingent Worker as Self, Manager, HR Partner (Supervisory)

The User initiates the **Request Flexible Work Arrangement** process and enters the following information:

- Arrangement start and end dates
- Position (if employee has more than one)
- Fully or partially remote
- Hours per week, days per week, and/or days of the week remote

Note: If the Manager or HR Partner (Supervisory) initiates a request on an employee's behalf, they will only have access to fill out the initiation page. The employee will receive and must complete the home contact change To Do step and the questionnaire.

Step 2: To Do Step: Update Home Contact Change

User: Employee as Self

The employee receives a **To Do** step to review and update their home contact information. Any employee with a Flexible Work Arrangement should have an address assigned to the **Work from Home** address usage. They can assign this to an existing address or add a new address.

This must be completed before the employee can receive the questionnaire.

Step 3: Complete Questionnaire

User: Employee as Self

The employee receives the Flexible Work Arrangement Questionnaire to complete.

Step 4: Questionnaire Risk Flag Report Sent to Flexible Work Arrangement Analyst

User: Flexible Work Arrangement Analyst (UW)

This step occurs only when an employee triggers one or more risk flags in their questionnaire. When this occurs, a notification and a report will be sent to the Flexible Work Arrangement Analyst role to review.



The risk flags are:

- Working internationally
- Working internationally on a restricted fund (0133, 0142, 0143, 0144)
- Working internationally and not a US citizen
- Using personally owned hardware and working with restricted or sensitive data
- Using personally owned hardware and working with protected health information

Note: The Flexible Work Arrangement Analyst does not have approval authority in the process, so the business process automatically proceeds. If the Flexible Work Arrangement Analyst has concerns about the risks associated with a request, they should contact the Manager and HR Partner (Supervisory) with a request to hold their approvals.

Step 5: Manager Approval

User: Manager

The Manager will receive the details of the initiation page, as well as a report of the employee's questionnaire answers for review.

The Manager can take one of four actions:

- Approve
- Deny
- Send back to the employee
- Add ad hoc approvers (e.g., Management Chain, HR Partner (Local), HR Executive (Supervisory), or HR Executive (Local))

Note: Managers should be aware of potential risk flags (see list in **Step 4** above)

Step 6: Manager's Designation of Headquarters Location

User: Manager

The Manager receives a questionnaire to determine if the employee is eligible to have an exception to the provision of the <u>Remote Work policy</u> related to headquarter location, based on the details of their flexible work arrangement request.

Step 7: HR Partner (Supervisory) Approval

User: HR Partner (Supervisory)

The HR Partner (Supervisory) will receive the details of the initiation page, as well as a report of the employee's questionnaire answers for review.

The HR Partner (Supervisory) can take one of four actions:

- Approve
- Deny
- Send back to the employee
- Add ad hoc approvers (e.g., Management Chain, HR Partner (Local), HR Executive (Supervisory), or HR Executive (Local))

Note: HR Partners (Supervisory) should be aware of potential risk flags (see list in Step 4 above)

Step 8: Assign Headquarter Location Address Usage

User: HR Partner (Supervisory)

If the Manager indicates in their questionnaire that the employee is eligible for an **exception** to the provision in the Remote Work policy related to headquarter location, the HR Partner (Supervisory) will receive a step to assign the headquarter location address usage to the same address as the employee's Work from Home address.

Step 9: HR Executive (Supervisory) Approval

User: HR Executive (Supervisory)

If the employee's primary home address is not in Wisconsin, the HR Executive (Supervisory) will receive a step to review the request to determine if the employee can work remotely outside of Wisconsin. The HR Executive (Supervisory) can take one of four actions:

- Approve
- Deny
- Send back to the employee
- Add ad hoc approvers (e.g., Management Chain, HR Partner (Local), HR Executive (Supervisory), or HR Executive (Local))

Note: The HR Executive (Supervisory) needs to go to the employee's profile to view contact information. This is not available in the approval step.

Additional Resources

- Request Flexible Work Arrangement in Workday Employee: https://kb.wisconsin.edu/workday/internal/144878
- End Flexible Work Arrangement in Workday Employee: https://kb.wisconsin.edu/workday/internal/144849
- Address Definitions Employee in Workday: https://kb.wisconsin.edu/workday/internal/151028
- Flexible Work Arrangement (FWA) for Managers & Flexible Work Arrangement Analysts: https://hr.wisc.edu/hr-guides/for-hr-professionals/flexible-work-arrangement-fwa-for-managers-flexible-work-arrangement-analysts/