Carnegie Mellon University

Human Resources

Flexible Work Arrangement Guidelines for Staff

Effective Date: January 1, 2027

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I. Introduction

In recognition of the diversity of organizational needs, Carnegie Mellon University offers flexible work arrangements for eligible staff in situations where the business needs of the college/division can be equally or better met while allowing the staff member to balance professional and personal responsibilities. Flexible work arrangements, which are intended to support productivity and increase engagement, are available at the discretion of the staff member's supervisor, may require additional approvals beyond the direct supervisor, and can be modified or discontinued by the university at any time.

Because much of the work of the university is best completed through personal interaction between faculty, staff, students, colleagues and visitors, staff are assumed to conduct their work on-site and during regularly scheduled work hours, unless otherwise arranged through a flexible work arrangement — either during the recruitment process (new staff) or post-hire with their supervisor (existing staff).

At CMU, a **flexible work arrangement (FWA)** is the organizing of work such that the work location or work schedule meets the university's needs while balancing the employee's work and personal needs. FWAs can address the scheduling of work hours and/or the place where the work is done. CMU offers four types of flexible work arrangements; however, not all types of flexible work are suitable for all positions:

1. **Flexible Schedule**: A schedule that allows the staff member to adjust their start and end times, within set limits, without changing the total hours worked per workweek.
    - **Core Hours**: Full-time schedules (7.5 daily hours over 5 days, or 8 hours for exempt SEI staff and Life Safety teams) may be arranged between 7:30 a.m. through 6:30 p.m. Time zone differences may justify adjusted hours.
    - **Meal Period**: Includes a mandatory unpaid lunch break of at least 30 minutes (also applicable to eligible part-time employees based on hours worked).
    - **Policy Guidance**: This is the most common flexible work arrangement and is also referred to as "flex time." For implementation details, refer to the Policy on Flexible Working Hours for Carnegie Mellon University Staff.
2. **Compressed Schedule**: A schedule in which the number of hours expected to be worked each week is accomplished in less than the standard number of workdays. The most common form of compressed schedule accommodates the standard number of hours in a four-day workweek. For details, refer to the Compressed Work Schedule Guidance and Supervisor Framework [pdf] and Leader Job Aid: Compressed Work Schedule Questionnaire [pdf].
3. **Hybrid/Telecommuting**: An arrangement that allows the staff member to have an alternative work location (usually their home) and not commute to a CMU office or workspace for part of the workweek. A telecommuting employee is generally within geographic proximity to a CMU worksite and can be expected to engage in meetings and

activities on site.

4. **Remote Work**: An arrangement in which the staff member works away from an assigned CMU office or workspace (e.g., CMU campus, satellite office). Generally, the location of a remote worker is outside the geographical vicinity of the CMU worksite, and the staff member is not expected to travel regularly to the CMU office or workspace. Approval of remote work is location-specific (based on city and state) and considers several factors. Separate approval is required for staff who wish to work from multiple cities/states or for staff who wish to change the city/state from which remote work is performed.

Constraints: Non-standard remote work or hybrid/telecommuting arrangements (e.g., working fully remote, in-state hybrid for less than four days on-site, or interstate arrangements) are considered on a case-by-case basis and reserved for exceptional business needs. The university's primary operational model remains on-site or standard hybrid (a minimum of four days per week on-site), with alternative arrangements approved only when aligned with critical organizational requirements.

Any flexible work arrangement must meet the business needs of the department. Also, due to the cost and risk associated with determining and ensuring compliance with the employment and tax laws of various domestic jurisdictions, Carnegie Mellon generally limits remote work to those jurisdictions where CMU is registered to do business and process payroll (as defined within these guidelines) and hybrid/telecommuting arrangements to those where the alternative work location is located in the same state as the CMU office or workspace. Additional participation criteria are discussed in the Participation Criteria section below.

This document establishes Carnegie Mellon's guidelines for requesting and approving flexible work arrangements for staff in positions based in the United States. It outlines the approval procedures for standard hybrid/telecommuting arrangements and the request and approval procedures for non-standard remote work and hybrid/telecommuting arrangements.

Please discuss with your direct supervisor or contact your HR business partner if you have questions.

Scope

These guidelines apply to Carnegie Mellon non-union staff in positions based in the United States.

II. Guidelines

FWAs are intended to mutually benefit the non-union staff member and the university by providing flexibility for the staff member while supporting CMU's business needs.

1. FWAs can be implemented, modified or discontinued at the discretion of the immediate supervisor in consultation with the director, department head or vice president/dean.
2. Ongoing or long-term FWAs must be approved and documented. However, an occasional flexible arrangement (e.g., a variation in an arrangement for two weeks due to an emergency) is permissible to address limited duration business or personal needs.
3. Employees with FWAs may request modification or discontinuation of their arrangement at any time. Changes must be approved by the staff member's supervisor.

A. Participation Criteria

Supervisors may consider FWAs where practicable. The arrangement should ensure that the business needs of the team, department college/school, and university will continue to be met successfully. Any consideration of an FWA should include evaluation of the following criteria:

- The position and the department/unit
    - Job duties
    - Task interdependence
    - Type of customer service provided
    - Operational needs of the department/unit
    - Equipment needs
    - Funding source — Does the funding source permit remote work or work at the proposed non-CMU work location?
- New hire onboarding requirement and supervisory mandate
    - Supervisory presence expectation: Supervisors holding performance management responsibilities (for regular staff, fixed term/temporary employees, or student workers) are expected to model the standard 4:1 on-site posture. Supervisory exceptions under Tier 2 are rare and limited to extraordinary circumstances (e.g., managing a fully dispersed, multi-location team where co-location yields zero operational benefit).
    - New hire onboarding period: Employees new to a role without a Tier 1 exception must complete an initial 90-day onboarding period in the 4:1 baseline posture to establish operational rhythms before a Tier 2 exception is granted.
- The staff member's job performance
    - Has the staff member successfully completed the provisional period?
    - Has the staff member demonstrated satisfactory job performance (as measured in documented performance evaluations)?
    - Is the staff member on a performance improvement plan (PIP) or have they received a disciplinary warning?
- The impact of the arrangement on the organization
    - Has the staff member demonstrated evidence that an FWA will not adversely affect their ability to meet the needs of the organization?
    - How effectively can the work performed by the staff member be supervised remotely?
    - Will an FWA decrease the staff member's ability to serve customer needs, increase the workload of other staff or require an increased budget to cover the arrangement?
- Emergency considerations due to temporary and extraordinary circumstances

- Disability, medical, religious or pregnancy-related need — Requests for an FWA due to these factors must be requested through Disability Services.

B. Equipment and Services

Carnegie Mellon University provides a university-issued computing device for work purposes. The provision of equipment or services (e.g., internet service) beyond university-issued equipment is at the discretion and approval of the applicable director, department head or vice president/dean.

If the staff member separates from employment, university-provided equipment must be returned promptly upon separation.

Staff in remote work or telecommuting arrangements are required to ensure that computer(s) and/or computing devices and information are maintained securely. Staff are also expected to comply with Information Security Office (ISO) guidance for securing data, accounts and university-issued equipment.

California-Based Employees:

For California-based remote work or telecommuting arrangements, to comply with California law, the university will reimburse the staff member for all business expenses (equipment and services) needed to fulfill their day-to-day responsibilities. The university will not reimburse staff for expenditures that are solely for personal use.

C. Nonexempt Employees and Recording Time

Nonexempt staff are subject to the overtime and record-keeping provisions of the Fair Labor Standards Act (FLSA), as well as any state-specific wage and hour regulations. Time worked must be consistently and accurately recorded in Workday. Nonexempt staff must request approval in advance of overtime hours.

D. Workers' Compensation

Staff in flexible work arrangements whose work occurs in an alternative work location (remote work or hybrid/telecommuting) are covered by applicable workers' compensation laws. Workers' compensation applies to work-related injuries in both the university work location and the alternative work location.

To ensure the university is following applicable workers' compensation laws, staff approved for an FWA may not change the city or state from which they work remotely/telecommute without advance approval from the supervisor and the Office of Human Resources. Depending on the new location, this may require a new remote work request. Approval for a remote work/telecommuting arrangement from a particular city and state does not mean that remote work/telecommuting arrangement will automatically be approved for a different city and state.

E. Requests

Requests for flexible schedules (flex time) are evaluated and approved on a case-by-case basis by the staff member's supervisor based on business needs of the college/division. The VP/dean must approve compressed schedules. Approved requests are forwarded to the department's HR business

partner to review and upload to the staff member's Workday employment record.

Ongoing and long-term flexible work arrangements between a staff member and their supervisor must be documented via Workday. Occasional flexible arrangements do not need to be documented via the request form. As FWAs are based on the staff member's current role and are between the staff member and their supervisor, if the staff member transfers to a different role or there is a supervisory change, the staff member must obtain approval from the new supervisor for a flexible work arrangement.

F. Expectations for Approved Remote Work and Hybrid/Telecommuting Arrangements

Staff with an approved RWA or hybrid/telecommuting arrangement are expected to work their normally scheduled hours unless otherwise agreed to by the staff member's supervisor. The following are additional expectations:

- The staff member must use PTO or other current leave options and follow the normal process for reporting off work if illness or other issues prevent the staff member from working remotely.
- The staff member must conduct their work with the same professional, technical and ethical standards as required when working on-site. All policies and procedures of Carnegie Mellon University remain in effect, including expectations for performance and productivity.
- The staff member must be in regular communication with their supervisor and respond in a timely manner on all applicable communication channels (email, phone, etc.) during the staff member's normal work hours.
- Remote/hybrid work is not a substitute for dependent care.
- The staff member must maintain their computer, and the information to which they have access, securely. The staff member must also comply with all Information Security Office directives related to patching, virus scanning and software updating as needed. Refer to the Tech Quick Start for Faculty and Staff.
- Nonexempt staff:
    - Must continue to accurately track and record time worked in Workday.
    - May not work overtime hours without written pre-approval from the staff member's supervisor.

If a supervisor believes that the staff member's work under the arrangement does not meet expectations, the supervisor can adjust the approved arrangement up to and including requiring the staff member to transition to on-site work.

III. Procedures for FWA Requests and Approval

A. Flexible Schedules

1. Employee or Supervisor: Initiates FWA and completes the questionnaire.
2. Supervisor: Reviews the FWA request initiated by the employee.

3. Supervisor's Supervisor: Reviews/approves FWA request.
4. OIE: Reviews/approves the FWA request if the employee is on a job-based visa.
5. HR Business Partner (HRBP): Reviews details of the FWA, ensures accuracy and prepares the FWA agreement.
6. Employee: Reviews and acknowledges FWA Agreement.

B. Compressed Schedules

1. Employee or Supervisor: Initiates FWA and completes the questionnaire.
2. Supervisor: Reviews the FWA request initiated by the employee
3. Supervisor's Supervisor: Reviews/approves the FWA request.
4. Department Head: Reviews/approves the FWA request.
5. Dean/Vice President: Reviews/approves the FWA request.
6. OIE: Reviews/approves the FWA request if the employee is on a job-based visa.
7. HR Business Partner: Reviews details of the FWA, ensures accuracy and prepares the FWA agreement.
8. Employee: Reviews and acknowledges FWA Agreement.

C. Standard Remote Work and Hybrid/Telecommuting Arrangements

- **Hybrid/Telecommuting Arrangements that Require at Least Four On-Site Days per Week and the Telecommuting Occurs within the Same State**

  Beginning January 1, 2027, and based on the business needs of the college/division and department, **staff work arrangements should be either (i) fully on-site, or (ii) hybrid/telecommuting with staff on-site at least four days per week and the remainder of time at an off-site work location within the same state as the on-site work location (or the telecommuting for the remainder of the time otherwise meets one of the approved exceptions for telecommuting across state lines as specified later in these guidelines).** Decisions will be made on a regular basis and will be guided by the university's principles.

  Staff who are working hybrid/telecommuting in the U.S. may be approved by their supervisor to do so for their own convenience, within the parameters established by their department, but only if the staff member's primary work location is in AZ, CA,CO, MD, MA, NJ, NY, OH, PA, TX, VA or DC and the telecommuting occurs within that same state (e.g., if the staff member's off-site location is the staff member's home/residence, the staff member's home/residence must be in the same state as the staff member's primary work location) or the telecommuting otherwise meets one of the approved exceptions for telecommuting across state lines as specified below. Supervisors have the authority to approve remote work and hybrid/ telecommuting arrangements meeting the foregoing requirements, subject to the guidelines established by OHR for approving such arrangements.

Staff must work with their supervisors to execute a hybrid/telecommuting arrangement.

Telecommuting across state lines

Telecommuting across state lines generally is not permitted except where tax reciprocity rules would allow and CMU's compliance obligations can be met, including the following limited circumstances:

If the staff member's primary work location is in:

a. Virginia primary work location

The staff member can also telecommute/work from home on a periodic basis if their home/residence is in DC, but only if the staff member.

(i) does not maintain a residence (such as an apartment) in Virginia, and

(ii) completes and submits to CMU the appropriate payroll forms to have DC income tax withheld from their wages, and

(iii) receives only wage or salary income in Virginia (i.e., does not have other sources of income from Virginia).

The staff member can also telecommute/work from home on a periodic basis if their home/residence is in Maryland, but only if the staff member.

(i) does not maintain a residence or abode (such as an apartment) in Virginia, and

(ii) completes and submits to CMU the appropriate payroll forms to have Maryland state and local income tax withheld from all of their wages, and

(iii) receives only wage or salary income in Virginia (i.e., does not have other sources of income from Virginia), and

(iv) is present in Virginia (i.e., is working at the staff member's primary work location in Virginia) for 183 days or less during the calendar year.

b. Washington, D.C. primary work location

The staff member can also telecommute/work from home on a periodic basis if their home/residence is in Virginia, if the staff member:

(i) does not maintain a residence (such as an apartment) in DC, and

(ii) completes and submits to CMU the appropriate payroll forms to have Virginia income tax withheld from their wages.

The staff member can also telecommute/work from home on a periodic basis if their home/residence is in Maryland, but only if the staff member:

(i) does not maintain a residence or abode (such as an apartment) in DC, and

(ii) completes and submits to CMU the appropriate payroll forms to have Maryland state and local income tax withheld from all of their wages, and

(iii) is present in DC (i.e., is working at the staff member's primary work location in DC) for

183 days or less during the calendar year.

Except as indicated in category a. or b. above, a staff member cannot otherwise telecommute if their home is in a state other than their primary work location, even if CMU is registered to do business in the state where their home is located (e.g., cannot be a Pittsburgh-based staff member and work from home if the staff member's home is in Maryland).

- **Temporary remote work allowance (up to 30 calendar days)**

  Staff may be approved to work remotely or telecommute for their own convenience from any U.S. location, provided such remote work/telecommuting does not exceed 30 calendar days in total in any one calendar year. Supervisors have the authority to approve such arrangements, and no further approval is required.

  Important restriction on onsite requirements: This allowance cannot be used to modify or reduce an employee's regular weekly work posture (e.g., 4 days onsite during the academic year/3 days onsite during summer seasonal flexibility). It is intended solely for temporary, short-term situations.

  Common examples of when this 30-day allowance applies include:

  - **Personal or Family Convenience:** Working remotely while visiting family out of town, managing household repairs or managing short-term personal obligations.
  - **Transit & travel disruptions:** Working remotely during major local road closures (e.g., Parkway closure), severe weather or major transit impacts.
  - **Minor illness or recovery:** Working remotely while experiencing mild symptoms or recovering from an illness, provided employee feels well enough to work and tasks can be completed effectively off campus.
  - **Post-travel adjustment:** Working remotely for 1–3 days immediately following extended or international business travel to adjust across time zones and recover while maintaining core duties.

- **Current employees with existing arrangements prior to March 2020**

  Any current staff who, prior to March 2020, was authorized to work remotely or telecommute may continue to do so from the authorized jurisdiction for the period covered by the approval, provided they (i) have executed the HR-approved Remote Work Agreement and their work/home location is properly entered and correct in Workday, and (ii) have a current arrangement approved through the Office of Human Resources by way of an offer letter or offer letter amendment since March 2020 (whether permanent or temporary), but only for so long as indicated in the offer letter or offer letter amendment, provided their work/home location is properly entered and correct in Workday. These arrangements have already been approved, and no further approval is required. These arrangements may not be further extended beyond the period approved without following the request and approval process for non-standard remote work and hybrid/telecommuting arrangements process noted

below.

D. Exception Framework and Core Principles

At CMU, standard flexible work arrangements (FWAs) such as structured hybrid schedules or standard flex time — are designed to maintain a vibrant, student-centric on-campus community. CMU has a structured framework for granting exceptions to standard posture. These exceptions generally fall into specific categories, require higher levels of executive approval and are governed by unique operational guardrails.

1. The Three-Tier Exception Framework

- **Tier 1 (Geographically Bound/High Specialization Exceptions):** Fully remote work is permitted strictly for roles operating entirely out of state where on-campus presence is unfeasible, or positions requiring niche technical talent that cannot be sourced within the local commuter market. Requires VP/dean endorsement and final approval from the FWA Committee.
- **Tier 2 (Business-Critical Local Hybrid Framework):** Non-standard hybrid schedule (2–3 days per week on-site). Fully remote exceptions are prohibited under Tier 2. The employee must reside within the local commuting market.
- **Tier 3 (Core Campus Operations and High On-Site Affinity):** Standard 4:1 baseline is enforced. Broad role- or department-based exceptions are prohibited.

2. Evaluative Core Principles

- The "low-touch stakeholder footprint" threshold: Higher education relies on a residential, collaborative ecosystem. A primary guiding principle is that an exception must not compromise the student, customer or coworker experience. If a role requires regular face-to-face contact, access to on-campus physical files or specialized campus equipment, an exception will generally be denied.
- Performance and autonomy: Employees granted an exception must have a proven history of:
    - High productivity and consistently meeting or exceeding performance expectations.
    - Self-motivation and the ability to troubleshoot and work independently without close on-site monitoring.
- Net-positive operational impact: Proving a job can be done remotely is insufficient. Requesting departments must demonstrate that a non-standard schedule delivers a net-positive operational impact and superior efficiency compared to the standard 4:1 posture.
- Space constraints protocol: Physical space limitations will not serve as an automatic justification to grant FWA exceptions. Units experiencing space constraints are expected to transition Tier 2 staff to a shared desk or hoteling model.

E. Request and Approval Process - Non-Standard Remote Work and Hybrid/Telecommuting Arrangements and Remote Work

Except as indicated above in Section III.C. (regarding Standard Remote Work and Hybrid/Telecommuting Arrangements), staff may be approved to work remotely or telecommute only through the defined

request and approval process outlined in Section III.E, Section III.F, and Section III.G of these guidelines.

Request and Approval Process – Remote Work and Non-Standard Hybrid/Telecommuting Arrangements

The staff member's supervisor requests the flexible work arrangement using the "Request Flexible Work Arrangement for Worker" task in Workday. Requests will be reviewed as detailed in Sections E, F and G below.

There is a strict administrative presumption against approving non-standard arrangements. The requesting department bears a heavy burden of proof to demonstrate that denying the exception will directly cause critical operational disruption or failure to meet core university missions.

- **Pre-Screening Tool:** Prior to submitting a request in Workday, department leaders must complete the Leader Job Aid: Tier 1 (Geographically Bound / High-Specialization) Exception Pre-Screening Tool [docx] or Leader Job Aid: Tier 2 (Non-Standard Hybrid) Exception Pre-Screening Tool [docx].
- **On-Site Cadence:** For Tier 2 requests, department heads may recommend 2–3 days on-site per week, with 3 days as the recommended institutional target. Final approval authority over approved cadence rests with the FWA Committee.
- **Time-Bound Approvals and Annual Audits:** All approved Tier 1 and Tier 2 exceptions are time-bound and subject to annual operational reviews. Out-of-state Tier 1 arrangements undergo annual tax and payroll compliance audits.

All requests must follow these guidelines and must be fully approved before being implemented.

Once completed, the request requires approval from the following:

- For academic units: department head/dean
- For administrative units: vice president

See the Flexible Work Arrangement System Guide [pdf] for instructions on submitting a request.

Please Note: Hybrid/telecommuting arrangements meeting the requirements specified in Section III.C (regarding Standard Remote Work and Hybrid/Telecommuting Arrangements) of these guidelines may be approved by their supervisor within the parameters established by their college/division, and no further approvals are required. Similarly, the request and approval process should **not** be used and is not required for staff who are working remotely or telecommuting for their own convenience from any U.S. location, provided such remote work/telecommuting does not exceed 30 calendar days in total in any one calendar year and is approved by the staff member's supervisor, as specified in the Arrangements that do not exceed 30 calendar days section of these guidelines.

F. Tier 2 Business-Critical Local Hybrid Exception Process (2–3 Days On-Site)

Exceptions to the standard baseline posture (at least 4 days per week on-site) under Tier 2 may be granted only in rare and exceptional operational circumstances for positions located within the local commuting market. Tier 2 requests permit a non-standard hybrid schedule of **2 to 3 days on-site per week**; **fully remote work is prohibited under Tier 2**.

1. Core Eligibility & Burden of Proof

Tier 2 exceptions are evaluated on a strict operational necessity standard. The requesting department must demonstrate that a non-standard hybrid posture will not impair on-campus operational presence during normal business hours and will deliver a net-positive operational impact — proving that the arrangement optimizes unit efficiency, safeguards mission-critical continuity or addresses localized constraints significantly better than the standard 4:1 baseline.

To qualify for consideration under Tier 2, the requesting department must demonstrate that the role meets all of the following baseline operational parameters:

- **Highly Digital & Independent:** Core job functions are executed primarily via digital infrastructure and require minimal physical proximity to campus resources (e.g., labs, physical archives or specialized equipment).
- **Low-Touch Stakeholder Footprint:** The role requires minimal in-person, face-to-face interaction with students or key physical stakeholders.
- **Local Commuter Bound:** The employee resides within the local commuting market, maintains a consistent weekly on-site presence, and agrees to return to campus for additional days whenever business needs, key events or supervisors require it.
- **Role Eligibility & Supervisory Limits:** The position functions as an individual contributor. Supervisors holding performance-management responsibilities for regular staff, fixed term, temporary employees, or student workers must model the standard 4:1 on-site posture; supervisory exceptions under Tier 2 are rare and allowed only under extraordinary business reasons (e.g., managing a fully dispersed, multi-location team).
- **Performance Baseline & New Hire Onboarding:** The employee has a proven record of strong performance and autonomy. New hires without a Tier 1 exception must complete an initial 90-day onboarding period in the standard 4:1 posture before a Tier 2 exception may be considered.

2. Organizational Scaling & Equity Review

To maintain cross-divisional consistency and institutional equity, leaders must apply exception requests consistently across similar positions. As part of the formal application, the requesting department head must complete an Organizational Review addressing the following:

- **Role Profile Listing:** Identify and list all employees in identical or similar roles/job profiles within the college or division.
- **Rationale for Excluded Roles:** If any similar roles within the college/division are excluded from the exception request, provide a detailed operational rationale explaining how their specific job duties substantially differ to justify the exclusion.

3. Cadence Recommendation & Final Approval

- **Cadence Window:** The requesting department head may recommend **2 to 3 days on-site per week**, with an institutional recommendation of 3 days on-site per week whenever possible.
- **Review Body:** A committee composed of the vice president for finance and chief financial

officer, associate VP and chief human resources officer, and provost (or their designees), with advice from the Office of General Counsel, shall review all requests.

- **Final Authority & Annual Audit:** The FWA Committee holds final approval authority over the approved on-site cadence to ensure institutional equity. All approved Tier 2 exceptions are time-bound and subject to annual operational reviews.

Note: All required justifications, organizational scaling details and cadence recommendations must be structured using the standardized questionnaire format provided in the Tier 2 Business-Critical Local Hybrid Exception Request [docx]. Department leaders should complete the Leader Job Aid: Tier 2 Exception Pre-Screening Tool [docx] prior to submitting requests in Workday.

G. Tier 1 Geographically Bound / High Specialization Exception Process (Fully Remote / Interstate):

Exceptions to the standard baseline posture (at least 4 days per week on-site) under Tier 1 permit fully remote work arrangements (out-of-state or out of the local commuting market). Tier 1 exceptions are strictly limited to rare and exceptional circumstances where on-campus presence is geographically unfeasible or where positions require highly specialized, niche talent that cannot be sourced within the local commuter market.

1. Core Eligibility & Burden of Proof

Tier 1 exceptions are evaluated on a strict institutional necessity standard. The requesting department bears a heavy burden of proof to demonstrate that denying the exception will directly cause critical operational disruption or failure to meet core university missions.

To qualify for consideration under Tier 1, the requesting department must satisfy all of the following requirements:

- **Labor Market & Recruitment Failure:** For position-based exceptions, the department must provide verified recruitment data covering the preceding **6 to 12 months**. This documentation must include:
    - The exact number of local and hybrid applicants evaluated.
    - Specific, detailed operational justifications for the disqualification of local candidates.
    - Documentation of specialized recruitment agencies, targeted outreach or advertising efforts used to exhaust local talent pools.
- **High-Specialization/Unique Qualifications:** Written justification establishing the candidate's or employee's scarce skill set and unique qualifications relative to available local market candidates.
- **Financial & Stakeholder Impact:** Quantifiable data demonstrating the measurable risk to grant funding, tuition revenue, student retention or project delivery timelines should the position remain vacant or the incumbent depart.
- **Performance Baseline:** For current employees, a recent performance evaluation showing a rating of "Successful Performance" (or higher) to prove high autonomy. For new hires, verified

documentation demonstrating the candidate possesses the self-direction and core competencies required to succeed without daily on-site oversight.

2. Compliance & Cost Responsibility

Interstate and fully remote arrangements force the university to absorb significant ongoing legal, tax, payroll and compliance risks. Approval of Tier 1 arrangements is subject to the following compliance guardrails:

- **Out-of-State Jurisdiction Review:** Arrangements depend on a comprehensive review of the compliance obligations associated with employing personnel in the specific state, including a determination that CMU can meet legal, regulatory, tax and payroll obligations without undue burden.
- **Registered Jurisdictions & Restricted States:** Consideration for Tier 1 remote work requires evaluation of whether the candidate is located within a jurisdiction where CMU is registered to do business and process payroll.[1]
- **Financial Accountability:** Due to internal and external costs incurred to establish and maintain compliance programs in remote jurisdictions, the requesting department may be required to contribute to or assume full financial accountability for all legal, tax, IT, insurance and payroll registration costs.
- **Annual Compliance Audits:** All approved Tier 1 out-of-state arrangements will be audited annually for tax, payroll and regulatory compliance.

3. Formal Endorsement & Approval Workflow

Tier 1 requests must follow a strict, multi-tiered governance structure prior to implementation:

1. **Executive Endorsement:** The request must receive formal endorsement from the applicable dean (for academic units) or vice president (for administrative units).
2. **Committee Review & Approval:** Final approval authority rests exclusively with the FWA Committee — composed of the vice president for finance and chief financial officer, associate VP and chief human resources officer, and provost (or their designees), with advice from the Office of General Counsel.
3. **Time-Bound Duration:** All approved Tier 1 exceptions are time-bound, granted strictly for the approved duration, and subject to annual operational and compliance reviews.

All required recruitment failure data, budgetary impact analyses, and out-of-state compliance details must be structured using the standardized questionnaire format provided in the Tier 1 Geographically Bound / High-Specialization Exception Request [pdf].

[1] Currently, these states include AZ, CA, CO, MD, MA, NJ, NY, OH PA, TX, VA and DC. Departments should explain why a qualified candidate is not available to work within these jurisdictions. Further, in light of the many compliance obligations of the university associated with doing business in multiple jurisdictions, remote work in AZ, CO, MD, MA, NJ, OH and TX (i.e., the jurisdictions in which the university does not have a campus/large physical presence) and states other than PA, CA, NY, VA and DC is limited to critical need and will be particularly scrutinized for propriety.

IV. Related Resources

A. Policies

- Flexible Working Hours for CMU Staff
- Staff Handbook (refer to flexible work)

B. Agreements

Submit a "Request Flexible Work Arrangement for Worker" task in Workday for the following arrangements:

- Flexible Work Schedule
- Compressed Work Schedule
- Standard Hybrid/Telecommuting
- Tier 2 Non-Standard Hybrid Telecommuting Agreement (In-State, 2–3 Days On-Site)
- Tier 1 Fully Remote Work Agreement (Out-of-State / High Specialization) In State/Across State Lines

C. Guides and Guidance Documents

- Flexible Work Arrangement System Guide [pdf]
- Flexible Work Arrangement Decision Tree [pdf]
- Leader Job Aid: Tier 1 (Geographically Bound / High-Specialization) Exception Pre-Screening Tool [docx]
- Leader Job Aid: Tier 2 (Non-Standard Hybrid) Exception Pre-Screening Tool [docx]
- Tier 1 and Tier 2 Exception Request Questionnaire [docx]
- Compressed Work Schedule Guidance and Supervisor Framework [pdf]
- Leader Job Aid: Compressed Work Schedule Questionnaire [pdf]