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**Subject:** Special Senior BA meeting on 6/30  
**Date:** Tuesday, July 5, 2022 8:34:00 AM  
**Attachments:** [flexible work options presentation 6.13.22 final \(002\).pptx](#)  
[image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)

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Good Morning,

Please find below the link to the recording of last week's Special Senior BA Meeting on Remote Work. I have also included the slide presentation for your reference.

Thank you.

 [Recordings](#)

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# Remote Work Plan

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## **SENIOR BA**

**JOY AZIKIWE-OYEYEMI  
CHRIS BLICKLEY/JULIA KEC  
JENN FELDMAN  
NICOLE TORSELLA-HARRIS  
MARYANN PICCOLO**

**JUNE 18, 2022**

# Process

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- Flipped/Locked addresses
  - Role of HR Analyst
  - Students/Temporary Faculty
  - Pre-pandemic off-work arrangements
  - Convenience of Employee
  - Convenience of Employee
- Remote Work cannot be described or promoted in job postings
- 1-2 days per week
- 3 days per week
- 4 days per week
- 100% off-campus work

	Manager Approval	School/Center Leadership Approval	Provost, EVP, President or Designee Approval and Committee Review
1-2 Days Off - Campus	X		
3 Days Off - Campus	X	X	
4 Days Off - Campus WITHIN NJ, DE	X	X	*
4 Days Off - Campus OUTSIDE OF PA, NJ, DE		X	X
5 DAYS REMOTE	X	X	X

\*Schools/Centers may require higher-level approval if they wish

# May 2-Flexible, Remote & Hybrid Principles

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## Guiding Principles

- Employ a diverse workforce where people are engaged, connected and thriving
- Support a culture where different modes of flexible, hybrid, and remote work may be permissible for staff consistent with institutional needs
- Reflect principles of the lessons learned over the past two years that affirm our core principles, reflecting today's landscape
  - ✦ Support
  - ✦ Remain
  - ✦ Create
  - ✦ Sustain
  - ✦ Manage
  - ✦ Encourage

## Key Definitions

- Flexible Work
- Hybrid work
- Fully remote work
- Required Onsite
- Hybrid Eligible
- Remote Eligible

# May 2-Flexible, Remote & Hybrid Principles (cont)

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- Factors to consider in determining the approval of flexible, hybrid, or remote requests, include but are not limited to the following:
  - Approval of the request is expected to not diminish the work quality or disrupt productivity.
  - Performance is measurable.
  - Supervision will not be hindered by flexible, hybrid, or remote work.
  - Flexible, hybrid or remote work approvals are made without favoritism or bias, based on a documented analysis of the considerations described in these Guiding Principles.
  - The obligations, duties, and relationships of staff will not be affected by flexible, hybrid, or remote work.
  - **Only salaried (i.e., exempt), non-temporary positions are eligible for remote work outside the tri-state area. (Pennsylvania, New Jersey and Delaware.)**
- Departments may not hire individuals through Penn payroll whose work takes place primarily outside the U.S.
  - Employment of an individual outside the U.S. could make both the individual and Penn subject to tax and labor laws in the foreign country
- **The responsibility is on the School/Center leadership to ensure that remote work outside the U.S. is not approved without prior consultation with GSS**
- Options for remote work abroad
  - Penn employees whose primary work location is in the U.S. may participate in business travel abroad for up to 90 days per calendar year without additional approval
- Departments seeking to employ an individual based primarily outside the U.S. having the following option:
  - Contact GSS to discuss your options  
Erica Sebastian  
Director, Global People Operations  
esebast@upenn.edu

# Process Today

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- Staff member and manager meet to review the policy
- Draft the justification
- Enter information into Workday
- Go through approval process up to Dean/VP or their designee
- Review annually
- May begin to post jobs as hybrid or fully remote (requires approval)

# Convenience of Employer Tax Doctrine

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- Convenience of Employer:
  - The University (department, school, or center) requires an individual to work remotely because:
    - ✦ There is no space or there are space limitations, or
    - ✦ There is a “bona fide” business purpose for the employee to be working in a secondary location (temporarily or permanently).
  - Employee’s work addressed is sourced to the “off campus” address. In most cases this will be their home address.
  - Special attention should be given to those employees working outside the tri-state area for tax compliance and benefit purposes.
- Convenience of Employee:
  - An individual is allowed to work remotely either because the University (department, school, or center) has provided this option or because the individual has made the request to do so.
    - ✦ In this situation, the employee’s work addressed must be sourced to a campus address.
    - ✦ PA income tax as well as City Wage Tax applies

# Reimbursements for Travel to Campus

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- Employees who are working a hybrid schedule will not be reimbursed for travel to their Penn work location on the days they are working at Penn.
  - The IRS considers such travel to be the costs of commuting, which are non-reimbursable personal expenses.
- Employees who are working fully remote for Penn's convenience are eligible for reimbursements related to certain expenses for occasional visits
  - Subject to department, school, or center approval
- Employees who are working fully remote for their own convenience are not eligible for reimbursements for occasional visits to Penn
  - Except where there are certain state requirements, or
  - At the discretion of the department, school, or center



# Posting Hybrid/Remote Positions

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Positively impact your candidate pools with hybrid/remote eligibility designation!  
Candidates are looking for hybrid/remote jobs, ensure that they can find them!

- If a position is hybrid eligible, remote eligible or remote required, indicate this on the job requisition/posting.
- Two places to enter this designation:
  - Additional Job Description Field
  - Job Posting Title
- Use exact language listed below at the end of the posted job title (i.e. Senior Research Investigator (Hybrid Eligible) AND in the Additional Job Description field:
  - Hybrid Eligible - This position is eligible for a hybrid work schedule with a work week divided between working onsite and working remotely
  - Remote Eligible - This position is eligible for a fully remote schedule with all work performed remotely. (Note: Only salaried (i.e., exempt), nontemporary positions are eligible for remote work outside the tri-state area: Pennsylvania, New Jersey and Delaware.)
  - Remote Required - This position is fully remote with all work performed remotely.

# Clear Communication

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FLEXIBLE, HYBRID AND REMOTE WORK

REMOTE WORK EXPECTATIONS POLICY

CREATING REQUISITION TIP SHEET

WORK LOCATION AND WAGE TAX

WORKDAY TIP SHEETS AND SUPPLEMENTAL GUIDES

GUIDELINES FOR MANAGING

MANAGEMENT COURSES

STAFF COURSES

EXPENDITURES FOR REMOTE WORK

policies  
online

# Compliance

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A word cloud centered around the word "ongoing". The word "ongoing" is the largest and most prominent, rendered in a large, orange, lowercase font. Surrounding it are numerous other words in various colors (green, blue, yellow, red, grey) and sizes, all related to the concept of continuous progress or persistence. The words are arranged in a roughly circular pattern around the central word.

uninterrupted  
undeterred prolongation advancement taking place  
unchecked in progress extant happening sequence  
relentless expedite continuing going on unabated  
persistence sequel developing continuation continuous proceed  
unfaltering persist continuity ceaseless eternal succession  
step progress current process  
onwards continue advancing discussion  
under way existent constant  
on going endless continued existing unremitting  
improvement everlasting growing unbroken  
perpetual grinding unceasing  
perpetuation never ending  
progression unending  
incessant

# Questions & Answers

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