



Teleworking Guidelines

Summary

The following guidelines provide a general framework for alternative worksite arrangements. These guidelines do not attempt to address the special requirements of all employees or positions. Specific conditions and agreed-upon work arrangements are to be outlined in a routine Teleworking Agreement, which is prepared jointly by an employee and their appropriate director or manager and subject approval by Human Resources.

The Cal Poly Corporation supports the use of a teleworking option in positions where appropriate and beneficial to the Corporation and the employee. The Corporation recognizes the benefits available through a planned and managed telework program. This option can save commute time and expense for employees, relieve congestion on campus, and offer uninterrupted time for concentrated work.

The opportunity to participate in a teleworking program is offered only with the understanding that it is the responsibility of the employee to ensure that a safe and proper work environment is maintained (e.g., an ergonomically appropriate and safe workspace is required; dependent care arrangements do not place dependents at risk of a lack of appropriate care or interfere with the employee's ability to perform work; personal disruptions such as non-business telephone calls and visitors are kept to a minimum). Failure to maintain a safe and proper work environment provides cause for an employee's immediate termination from this program.

Teleworking opportunities are based upon the duties of the employee's position and program requirements as determined by the appropriate director or manager. The Corporation will require that employees are available to be on campus at least one day per week. If the teleworking opportunity allows for the employee to work from home three to four days per week discussions may be had in regards to adjusting office space. If a physical space is not needed on campus the Corporation will reserve the right to reallocate that space for other needs. The Corporation also reserves the right to end teleworking agreements for individual employees if business needs dictate. At least 30 days' notice will be given to any employee whose teleworking agreement will be ending.

The Cal Poly Corporation will not be offering full remote work opportunities. Remote work is considered opportunities in which employees are not required to come to the worksite and are allowed to perform their duties fully at an offsite location. Due to this Corporation employees will not be allowed to reside in another state full time (per California regulations more than nine (9) months in one calendar year).

Definitions

- **Cal Poly Corporation Worksite:** Physical Corporation-maintained location.

- **Employee Regular Worksite:** Primary worksite location at which the employee is expected to perform their work.
- **Exempt Employees:** Employees who, based on duties performed and the manner of compensation, are exempt from the Fair Labor Standards Act (FLSA) minimum wage and overtime provisions. Exempt employees are paid an established monthly salary and are expected to fulfill the duties of their position(s) regardless of hours worked. Exempt employees are not eligible to receive overtime compensation or compensatory time off and are not required to adhere to strict time, record keeping, and attendance rules for pay purposes. Exempt titles are identified in Cal Poly Corporation Position Descriptions.
- **Non-exempt Employees:** Employees who, based on duties performed and the manner of compensation, are subject to all FLSA provisions. Non-exempt employees are required to account for time worked on an hourly and fractional hourly basis and are to be compensated for qualified overtime hours pursuant to applicable wage and hour laws. Non-exempt titles are identified in Cal Poly Corporation Position Descriptions.
- **Hoteling Space:** Designated, shared workspaces available and reserved by teleworking employees to perform occasional work on campus.

Eligibility

A teleworking arrangement may be approved for an exempt or non-exempt employee when it is in the best interest of the Corporation and the employee. The opportunity for teleworking is at management's discretion and must take into consideration numerous factors, including the job/position, nature of the work performed, operational needs, impact on the department and employee performance.

Process for Establishing A Telework Arrangement

1. Directors/managers in units in which teleworking is a viable option will meet with employees individually to discuss a telework arrangement. If the employee is unwilling or unable to telework, a teleworking arrangement will not be imposed.
2. Employee completes a [Self-Assessment](#) about their compatibility for telework.
3. The employee meets with their director/manager to discuss eligibility and feasibility of a teleworking agreement. If a teleworking request is denied, the appropriate director/manager shall, at the employee's request, provide a written explanation of the reason for denial.
4. The employee and director/manager complete training once per year.
5. The employee and director/manager complete/sign a [Teleworking Agreement](#).
6. The Teleworking Agreement is routed to HR for approval (copy of the signed agreement is placed in the employee's personnel file).

*Training is currently under development and will be posted once available.

Policies

Teleworking does not change the conditions of employment or applicability of Cal Poly Corporation policies, including employee's classification, compensation or benefits. However, by opting for a telework arrangement, *the employee agrees to submit to the additional policies and requirements* that are included throughout these guidelines. Wherever the work is performed, the employee is required to abide by all Corporation policies and procedures, including overtime, holidays, vacation leave and sick time. Violation of policies and guidelines or any other Corporation policies and procedures may result in the termination of the telework arrangement and/or disciplinary action.

Teleworking Agreements

The employee and director or manager will jointly develop a Teleworking Agreement that outlines specific conditions and agreed-upon work arrangements. It is at the discretion of the appropriate director or manager and is subject to ongoing review. Teleworking Agreements must be reviewed annually and whenever there is a major job change or the employee or director or manager changes positions. Because telework is selected as a feasible work option based on a combination of job characteristics, employee characteristics, and director or manager characteristics, a change in any one of these elements requires a review of the Teleworking Arrangement. The appropriate director or manager, in consultation with Human Resources, may modify or terminate the teleworking agreement early (before the end of the specified term) for performance concerns, changes in job duties, changing operational or business needs, or any other non-discriminatory reason. Any termination of teleworking will typically be made with at least 30 days' advance notice. Teleworking is not an employee right.

Work Schedule

The employee shall maintain regularly scheduled and approved work hours as agreed upon in the Teleworking Agreement and will be fully accessible during those hours. The agreement may allow for some flexibility in work hours for exempt employees which will typically include specific agreed-upon core hours. If an alternative work schedule is desired and feasible (i.e., 4/10 or 9/80 work schedule), the proper procedures must be followed and Human Resources must be consulted.

Work schedules are subject to ongoing review and changes are at the director or manager's discretion. Any changes to an approved schedule or alternate work location must be approved by the appropriate director or manager in advance and be documented in the Teleworking Agreement. In order to stay in line with all applicable state and federal laws, Human Resources must be consulted if a request is made to change a work location.

Non-exempt employees must not work overtime without prior approval from their manager. Non-exempt employees are required to accurately report work hours and strictly adhere to required rest and meal breaks in full compliance with policies and federal, state and local guidelines.

Duties and Assignments

While teleworking, the employee is expected to maintain the same productivity, quality of performance, communication and responsiveness as if working at the regular Corporation worksite. The employee's performance appraisals remain the same as if working at the regular Corporation worksite.

The employee and director or manager will establish an agreed-upon plan covering general duties and assignments to be performed, receiving and returning of assignments, activity reporting, and other communication with the manager while teleworking. The manager reserves the right to assign other work, as necessary, and may require some duties to be performed on campus at a Corporation worksite.

Communication

While teleworking, the employee is expected to maintain a presence using agreed-upon technology (telephone, Zoom, Instant Messaging, Microsoft Teams, etc.) and to be available to their manager, co-workers and others with the same response times as if at the regular Corporation worksite. The employee will maintain contact with co-workers and others and will notify them of any director or manager-approved changes in their posted telework schedule.

Working Environment

While teleworking, the employee is responsible for ensuring a safe and appropriate worksite environment suitable for accomplishing their regular job duties during scheduled hours of work and, if applicable, arranging for dependent care as they would if they were working at the regular Corporation worksite.

The employee is responsible for designating a remote workspace and ensuring that their remote workspace complies with Corporation safety guidelines and is equipped with the necessary equipment to carry out assigned duties. Employees may need to modify or add to existing office equipment to accommodate the unique circumstances of the telework environment. Each employee shall certify that their designated remote workspace complies with Corporation standards.

Safety

The employee is responsible for completing a [Teleworking Self-Certification Safety Checklist](#) and maintaining a safe and secure work environment, including maintaining the designated teleworking worksite in an ergonomically sound manner. The employee should consult Human Resources as a resource to provide information on a safe and ergonomically sound work environment. The Corporation may deny an employee the opportunity to telework or may rescind a teleworking agreement based on safety considerations.

A properly equipped workspace is important to increase safety and comfort, including at an off-site location. Standing, stretching, and taking regular, short breaks are important parts of workplace wellness. Visit the Cal Poly Environmental Health & Safety (EH&S) website and review:

- Ergonomic Tips for Working at Home: https://afd.calpoly.edu/ehs/docs/ergonomic_tips.pdf
- [Healthy Workstation Guidelines infographic](#)
- [Ergonomic Work Spaces video](#) to learn more about setting up your desk, chair, and other work space features to maximize your workspace wellness.
- The Working Virtually (team members) Bundle (in development)

The Corporation's liability for job-related accidents generally extends to injuries incurred in the course and scope of the employee's job duties and during the employee's scheduled hours of telework (as articulated within the Teleworking Agreement). "Teleworking" is defined as the actions directly related to working from an off-site location and does not include actions that the teleworker may take during break periods from working. Non-covered actions would include all actions that the employee would not be able to perform in their campus office, or which are directly related to the operation of the home. (Examples of such non-covered actions include cooking lunch, caring for children, domestic tasks, yard work, checking mail, etc.)

The employee is responsible for reporting any work-related injuries to their supervisor at the earliest opportunity, and injuries will be handled in the same manner as reports of injury at the primary worksite. In the event of a workers' compensation injury or illness, employees must notify their supervisor and manager immediately and must complete all necessary and/or management-requested documents regarding the injury. The employee will agree to hold the Corporation harmless for injury to others at the alternate worksite. The employee may not conduct in-person work-related meetings at the alternate worksite.

Cal Poly Corporation Space and Hoteling Options

Departments which have many employees teleworking may choose to create designated shared workspaces at a Corporation worksite available for teleworking employees to reserve for occasional use. Hoteling, or temporary use of a Corporation office, may be an option as an alternate work location. These workspaces may not be altered, and employees must use Corporation computers and equipment. Employees who wish to utilize hotel space should contact their appropriate Director for specific procedures. **Please note, hoteling options are in development, as this option progresses more information will be made available.

Equipment and Records

The Corporation may provide equipment, software, data, supplies and materials for use during the telework assignment, based on the position requirements and within the resource limitations of the department. If the employee will have custody of Corporation-owned equipment at a location other than a Corporation worksite, all employees using CPC owned computer equipment for teleworking purposes must check these items out with CPC IT and fill out all appropriate tracking forms.

Corporation-owned equipment, records and materials may be used for purposes of Corporation business only and must be protected against unauthorized or accidental access, use, modification, destruction, loss, theft, or disclosure. Incidental personal use is not permitted to interfere with the use of the equipment for Corporation business or add any more than an immaterial incremental cost to the unit. The Corporation's right to monitor the use of Corporation-owned property, such as computers and software, is not diminished by the telework arrangement.

The Corporation will provide for repairs to or replacement of Corporation equipment when damage to that equipment is incurred by an employee during the course and scope of their job duties and the employee's work hours. When the employee uses personal equipment, software, data, supplies and furniture, the employee is responsible for the maintenance and repair of these items unless other arrangements have been made in advance and in writing with the manager. All Corporation-owned equipment must be returned to the Corporation by the employee for inspection, repair, replacement or repossession with 14 days' written notice and immediately upon separation of employment. The employee must agree to return Corporation equipment, records, and materials within 14 days of termination of the Teleworking Agreement.

The employee is responsible for reviewing Corporation and CSU policies and guidelines for proper record management:

- [Record Retention and Disposition Standard](#)
- [Information Retention and Disposition Schedules](#)

Additional information can be found in the [Technology Toolkit](#).

Technical Support, Maintenance, Repair and Replacement

Maintenance and repair of Corporation-owned equipment issued to teleworkers will be the responsibility of the department. Equipment must be returned to the Corporation for appropriate maintenance/repair. The employee is responsible for installing, configuring, and updating all software on their equipment and complying with software licensing agreements. The Corporation will not provide in-person technical/computer support at the off-site location, but will provide Help Desk assistance for supported software (cpchelp@calpoly.edu) provided by the Corporation. The Corporation will not provide technical support beyond basic Level 1 Help Desk phone support and during established operating hours. In the event of equipment malfunction, the teleworker must notify their supervisor immediately. The employee may be asked to work on at a Corporation worksite until the equipment is usable or other equipment available. Repairs and the associated cost of repairs to Corporation equipment that result from employee's negligence will be the responsibility of the employee. Replacement and the associated costs of replacement of Corporation-owned equipment that is stolen or destroyed/damaged through negligence will be the responsibility of the employee.

Confidential and Sensitive Information

All Corporation employees, including teleworkers, are expected to adhere to Corporation and University policies and practices. This includes the policy on the responsible use of information technology resources and the confidentiality and security of Corporation and University information handled in the course of employment (see [Information Security Policy](#)).

Reimbursable Expenses

Employees working from home or other alternate locations are not on travel status and not eligible for meal reimbursement. Similarly, meals taken at home or other alternate locations (or delivered) during a Zoom business meeting are not reimbursable under the Corporation Finance and Accounting policies.

The preference is for an employee to pick up and use existing equipment from their office. Any items leaving campus must be documented on the [Teleworking Agreement](#) for inventory purposes. If it is necessary to purchase equipment, the items must be approved, in advance by the employee's manager. Only pre-approved business-related equipment that can be returned to the Cal Poly worksite at the end of the teleworking arrangement will be reimbursed.

Purchases must be made within Corporation Finance and Accounting policies. If any item needs to be installed, charges related to the installation are the responsibility of the employee. Other expenses (utilities, rent, furniture, etc.) will not be reimbursed.

Departments and the appropriate director or manager will evaluate on a case-by-case basis where reimbursement is necessary for teleworking with specific needs not already met with existing resources. Reimbursement is only allowable if the Corporation-issued office equipment (e.g., computer, printer, keyboard) cannot be relocated or the employee does not already have personal equipment or services (e.g., internet, telephone) at the teleworking worksite that would be required in order for the employee to perform their work duties.

Policy Limits

Equipment purchased during teleworking is limited to a basic workstation setup. This policy is not intended to cover specialized ergonomic equipment such as sit/stand desks or equipment to furnish a home office (desk, file cabinets, etc.). Any specialized ergonomic equipment needed outside of the pre-approved list will be considered a workplace accommodation. Please consult with Human Resources for assistance with requests outside of this policy.

Security

The employee will be responsible for the safety and security of all Corporation-owned equipment, records, and materials at the telework worksite and during travel to/from Corporation worksites. This includes remaining up to date with [ITS Information Security Standards, Information Security Responsible Use Policy \("RUP"\)](#) and other applicable information technology policies, as well as

maintaining data security and confidentiality of records in the same manner as when working at the regular Corporation worksite.

Other security measures include the use of locked file cabinets and desks, regular password maintenance, and any other measures appropriate for the job and the environment. Virtual Private Networks (VPN) and Multi-Factor Authentication (MFA) coupled with responsible home network management and general IT security alertness and prevention help to protect the Corporation's data. Personal computers are prohibited for processing of Level 1 data unless the personal computer is being used to connect to an approved campus remote desktop solution.

The employee shall implement steps for good information security at the telework worksite and must report any security issues to their manager. The employee must report any instances of loss, damage, or unauthorized access to property or information to their manager at the earliest opportunity.

The employee must follow all Information Security policies, including not duplicating Corporation-owned software and adhering to manufacturer's licensing agreements. Restricted-access materials will not be taken out of the Corporation worksite or accessed through the computer unless approved in advance by the director or manager. The employee must ensure information is not disclosed in violation of [FERPA](#) or other state or federal laws, regulations, or Corporation/CSU policies and practices. The employee is responsible for reviewing Corporation University policies and guidelines for protecting information, including:

1. [Information Technology Resources Responsible Use Policy \(RUP\)](#) - applies to anyone who uses Cal Poly's information technology resources. All users are expected to be familiar with and abide by this policy
2. [Overview and Summary](#) - summary guidelines for responsible use of Cal Poly information technology resources
3. FAQs - answers to frequently asked questions about the RUP
 - a. [Personal, Commercial, Political Uses](#)
 - b. [Access, Network/Web Use, File Retention](#)
 - c. [Policy Violations](#)
 - d. [Privacy Related Questions](#)
4. [Implementation and Practices](#), including matrix of responsibilities and implementation steps. [Detailed procedure for responding to a copyright infringement notice](#)
5. [Examples of Appropriate and Inappropriate Uses](#)

Work/Life Integration

Manager and Employee Teleworking Toolkits and helpful online training information:

1. CSU Employees: Transitioning to Remote Work During COVID-19 – Available on the Cal Poly Learning Hub
2. Contributing as a Virtual Team Member – Available on the Cal Poly Learning Hub
3. Taking Stock of Your Work/Life Balance – Available on the Cal Poly Learning Hub
4. Return to Campus Toolkits for Employees - <https://afd.calpoly.edu/learn-and-grow/employee-development/toolkits/return-to-campus-employee>

5. Return to Campus Toolkits for Managers - <https://afd.calpoly.edu/learn-and-grow/manager-development/return-to-campus-manager>

Please contact Human Resources at cpchr@calpoly.edu for more information regarding available Employee Assistance and Wellness programs.

Other

The employee will be solely responsible for any and all tax and/or insurance consequences/deductions, if any, of this arrangement and for conformance to any local laws/regulations (including but not limited to local zoning laws regulations). The Corporation will not provide any individual guidance to the employee regarding potential tax or insurance implications arising from the Teleworking Agreement nor any guidance regarding any local laws/regulations that may apply. Should the employee have any tax, insurance, or legal questions relating to routine telework, the employee is encouraged to consult with his/her own legal and/or tax professional.