What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



ACHRO 2023

The Last of the Fully Remote Workers:

What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by Rachel Shaw



Today's Topics

Evaluating Remote Work as a Reasonable Accommodation

- The Approach
- The Process
 - The Disability Interactive Process Hallway®





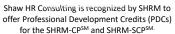
What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Professional Development Credit





For This Training Please Use Code:

560W]T:\

1 credits





Shaw HR Consulting trainings are eligible for points for IPMA-HR Certified Professionals (IPMA-CP) and IPMA-HR Senior Certified Professionals (IPMA-SCP).



Conference Materials

- Visit www.shawhrconsulting.com
- Click on: "Click Here to Download Conference Materials"
- Type in the conference code ACHRO23, as well as your email, and click Submit.
- Information is located at bottom of table of contents handout.
- An automatic download will start.



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



General Information on Session

- I have not read your Personnel Rules or Collective Bargaining Agreements and best practices may conflict with your organization's rules or policies, so
- Before changing any practices, you are encouraged to consult with your legal counsel to determine if there are any meet and confer obligations and/or regulations that must be taken into consideration before changes are made.
- I am not an attorney.
- I knowingly violate every PowerPoint rule so that you have a tool and resource that you can reference in the future.
- Enjoy!

Whether You Call it Telework, Remote Work, Work from Home, or Telecommuting...

... It Continues to be a Painful Accommodation to Manage



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Remote Work Evaluation: The Basics

- Employers must provide disabled employees and applicants with reasonable accommodations
- Remote <u>may</u> be a reasonable accommodation in some circumstances
- Employers have an obligation to ensure that they are making sound and data-based decisions when deciding if remote is a reasonable accommodation



Remote Work Evaluation: The Basics

- Employers cannot treat disabled persons worse than nondisabled persons.
 - If you have non-disabled persons who have been "allowed" to work fully remote, you may be required to do the same for disabled persons
 - Disabled persons will have preference over non-disabled persons with the same benefit of employment (a.k.a. remote work flexibility)



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Remote Work Evaluation: The Basics

- An employer has a duty to make reasonable accommodation(s) for the disability of any individual applicant or employee
 - Takeaway: Engaging in the interactive process is required
- A reasonable accommodation is any change in the work environment or in the way things are customarily done that enables an individual with a disability to apply for a job, perform a job, or gain equal access to the benefits and privileges of a job
 - Takeaway: Reasonable accommodations can take many forms, even undesirable ones.



Remote Work Evaluation: The Basics

- The Equal Employment Opportunity Commission (EEOC) has said that allowing an individual with a disability to work from home may be a form of reasonable accommodation under the Americans with Disabilities Act (ADA)
- Under the California Fair Employment and Housing Act (FEHA), an example of a reasonable accommodation can be "[p]ermitting an employee to work from home[.]"

Federal: EEOC, Work at Home/Telework as a Reasonable Accommodation;
https://www.eeoc.gov/laws/quidance/work-hometelework-reasonable-accommodation#:~:text=Yes.,allow%20other%20employees%20to%20telework
California: Cal. Code Regs., tit. 2, § 11065(p)(2)(L)



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Remote Work Evaluation: The Basics

- The ADA and FEHA do not require an employer to provide a specific accommodation
 if it causes undue hardship, i.e., significant difficulty or expense, or if it eliminates an
 essential job function
 - Meaning:
 - You can implement alternative accommodations, if they exist, that are more preferable to the employer
 - You can deny remote work as an accommodation if the employee cannot do their full job remotely, as long as you have not removed this essential function from others.



Interactive Process

If remote request is for a **TEMPORARY** period, (total time needed is less than XX months) most employers will follow your current short-term/temporary accommodation process.

If remote request is long-term, permanent or exceed XX months, we recommend you follow a robust **LONG-TERM** Interactive Process.

Temporary Work Restrictions /
Known Leave Needs

Permanent Work Restrictions or
Leave / Chronic Conditions /
Unknown Duration of Leave or
Restrictions

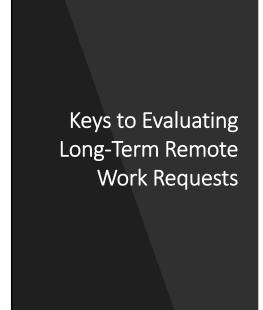
Short-Term Interactive Process (Low Touch)

Long-Term Interactive Process (High Touch)



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



- 1. Is In-Person Work an Essential Job Function?
- 2. Is Remote Work Medically Needed or are there Alternatives?





Is In-Person Work an Essential Job Function?



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Remote Work Evaluation: Essential Functions

Is Working In-Person / Teaching In-Person an Essential Job Function?

- If your organization has persons working fully remote due to department chair decisions, relationships, past accommodation decisions, etc. you likely CANNOT say working in-person is an essential job function
- If you have others in the same classification/job title working fully remote, you need to know this before you make decisions on in-person essential function performance. Do your homework.
 - Classified Staff
 - Faculty



Remote Work Evaluation: Essential Functions

Is Working In-Person / Teaching In-Person an Essential Job Function?

- Employers cannot treat disabled persons worse than non-disabled persons.
- If you have non-disabled persons who have been "allowed" to work fully remote, you will likely be required to do the same for disabled persons
- Disabled persons will have preference over non-disabled persons with the same benefit of employment (a.k.a. remote work flexibility)



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Remote Work Evaluation: Essential Functions

Is Working In-Person / Teaching In-Person an Essential Job Function?

- If you Answer:
 - YES, then you will be seeking alternatives to work remotely, because if you
 cannot discover alternatives, you will be looking at leave, alternative work
 exploration and possibly medical separation (faculty) / 39-month placement
 (classified)
 - NO, then you will want to have a very robust medical clarification process to ensure that ONLY people who have no alternative accommodation options are being accommodated to work fully remote



Remote Work Evaluation

Is Working In-Person / Teaching In-Person an Essential Job Function?

- Regardless if your answer is YES or NO, you will need a robust
 ADA/FEHA disability interactive process to confirm there is a medical need for accommodation and to seek alternative accommodations
 - IP must be consistently applied
 - IP must be documented

Let me show you how to do this!



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Is Remote Work Medically Needed, or are there Alternative Accommodations Available?



Remote Work Evaluation: Medical Need

Is Working In-Person / Teaching In-Person Medically Restricted?

- Remote work is an accommodation. Employers must demand health care providers list the underlining work restrictions / functional limitations that the health care provider and/or employee, believe are best accommodated with a remote work assignment.
 - 2 Cal. Code Regs., tit. 2 § 11069(d)
- You obtain this listing through Step #1/Door # 1 of the ADA/FEHA
 Disability Interactive Process



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Employee/Applicant Obligation

Employee / Applicant Obligation to Provide Reasonable Medical Documentation

2 Cal. Code Regs., tit. 2 § 11069(d)

- (d) Obligations of Applicant or Employee. The applicant or employee shall cooperate in good faith with the
 employer or other covered entity, including providing reasonable medical documentation where the disability
 or the need for accommodation is not obvious and is requested by the employer or other covered entity, as
 follows:
 - (1) Reasonable medical documentation confirms the existence of the disability and the need for
 reasonable accommodation. Where necessary to advance the interactive process, reasonable medical
 documentation may include a description of physical or mental limitations that affect a major life activity
 that must be met to accommodate the employee. Disclosure of the nature of the disability is not required.

Note: California Confidentiality of Medical Information Act / HIPAA



Remote Work Evaluation: Medical Need

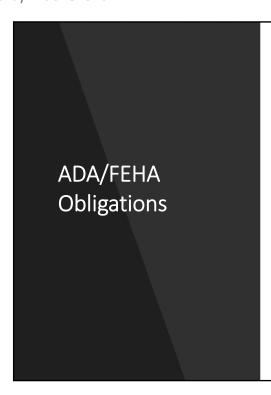
Is Working In-Person / Teaching In-Person Medically Restricted?

- Establish Your Consistent Process:
 - Will you utilize a Fitness for Duty Examination?
 - For all employees requesting to work fully remote for more than 1-year?
 - Only when you have objective and spoken concerns that the request is not legitimate and/or if the questionnaire is not returned?
 - Establish your steps at the front end of the interactive process and communicate this
 - You may have fewer requests due to this
 - You will not have any surprises when/if this step is used later in the Hallway



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Statutory Obligation # 1: Provide a timely good-faith interactive process

Recommendation/Consideration:

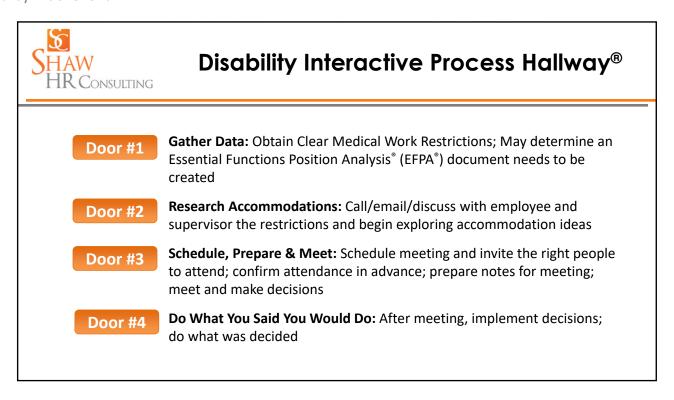
• Only start when medical documentation has been received. Not for verbal requests.







What to Do When Employees Can't (or Won't) Come Back to Campus







What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw

Door #1 is the Key to
Managing Remote Work
Accommodation
Requests



The Hallway: Door #1



- · Obtaining medical clarification for remote work requests can take time
- You will need to gather information and customize every questionnaire to ensure you are maximizing your chances of finding alternative accommodations
- You may need to send more than one medical questionnaire to get the clarity you need
 - e.g., if the medical questionnaire comes back and request is related to driving, need to be near a bathroom, exposure to viruses – you'll likely need more data, and your follow up questions will be different



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw

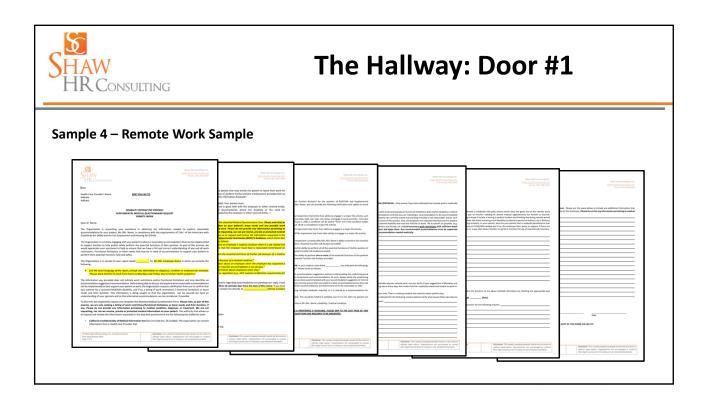


The Hallway: Door #1



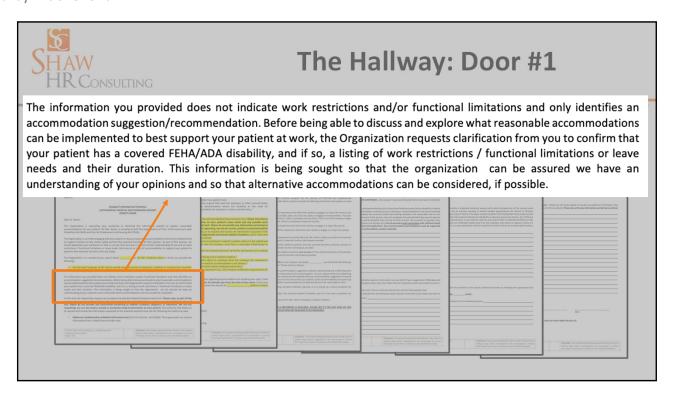
Prepare and Send a Questionnaire for Health Care Provider to Complete:

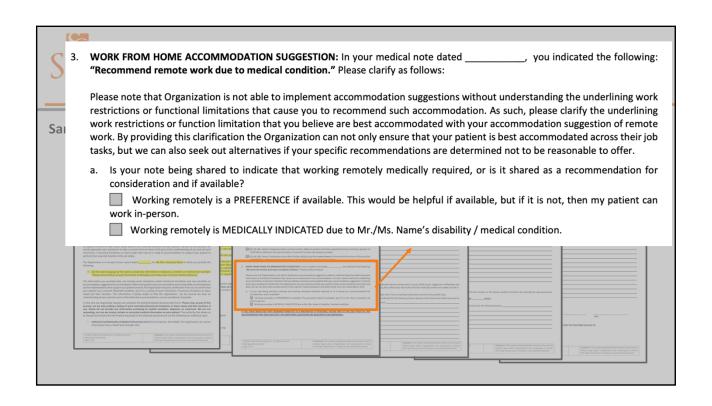
- ✓ Remote Work Medical Questionnaire Generic (Sample 4)
- ✓ Remote Work Medical Questionnaire Faculty Example (Sample 5)
- ✓ Driving Restrictions/Commute Medical Questionnaire (Sample 6)





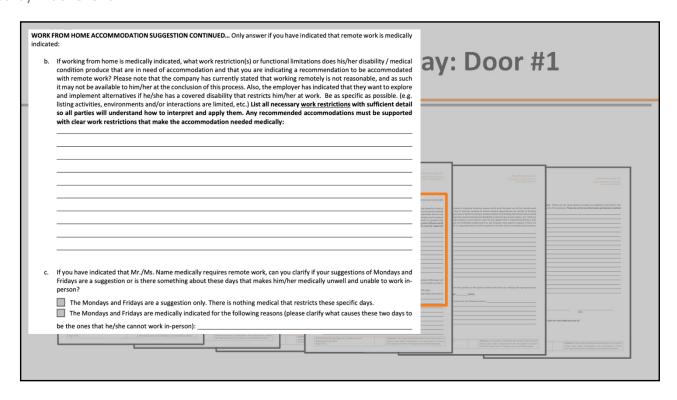
What to Do When Employees Can't (or Won't) Come Back to Campus

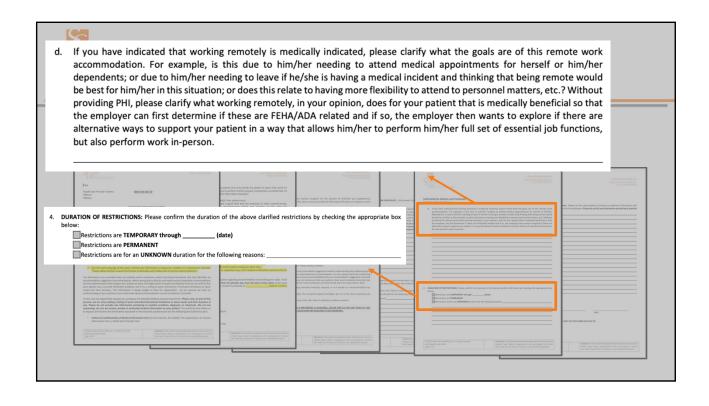






What to Do When Employees Can't (or Won't) Come Back to Campus







What to Do When Employees Can't (or Won't) Come Back to Campus

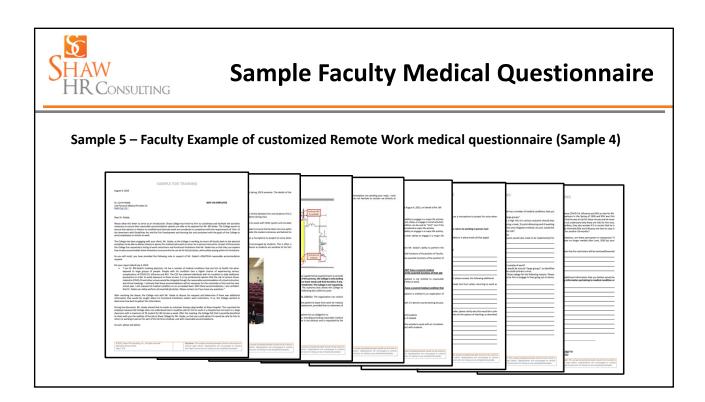
Presented by: Rachel Shaw



The Hallway: Door #1

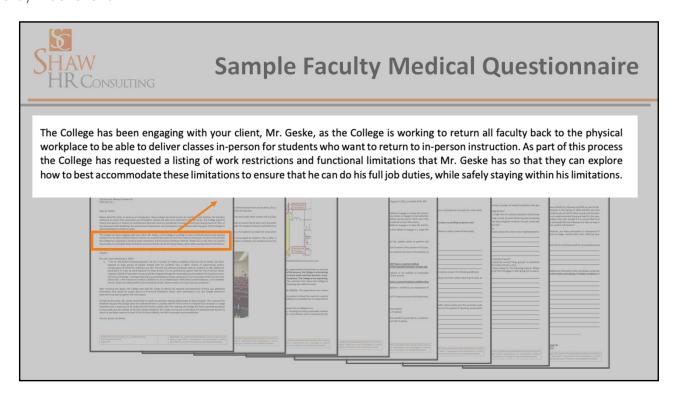


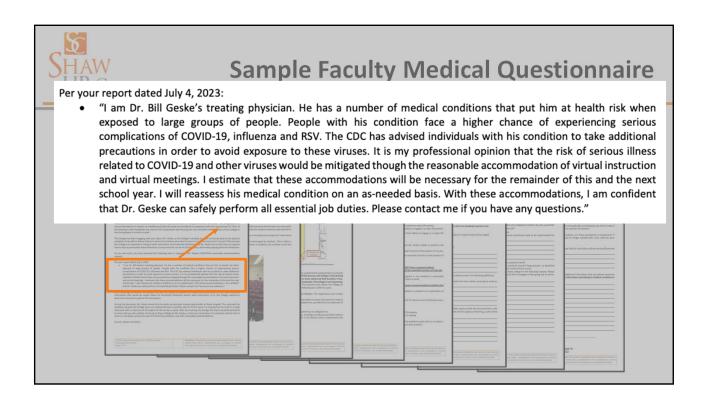
- Describe the specific workspace of the employee when working in-person
- Include pictures and diagrams
- Provide accommodation ideas that you can, or are willing to implement to support the employee to return to the physical workplace





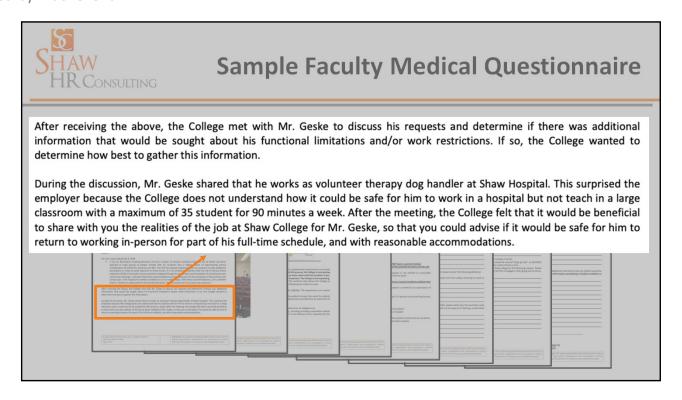
What to Do When Employees Can't (or Won't) Come Back to Campus

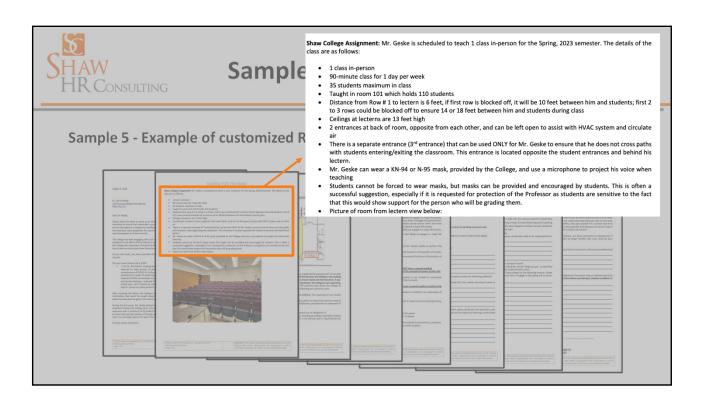






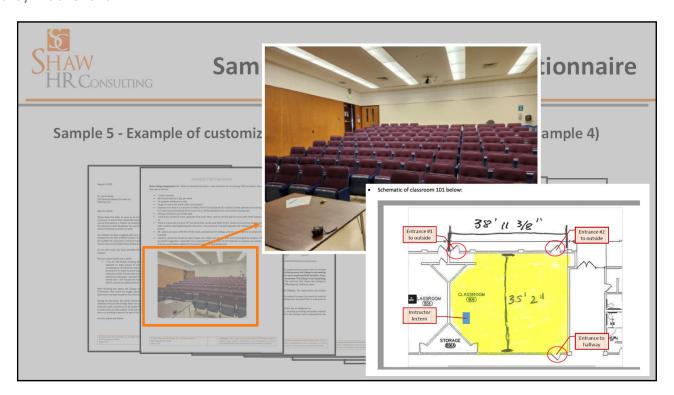
What to Do When Employees Can't (or Won't) Come Back to Campus

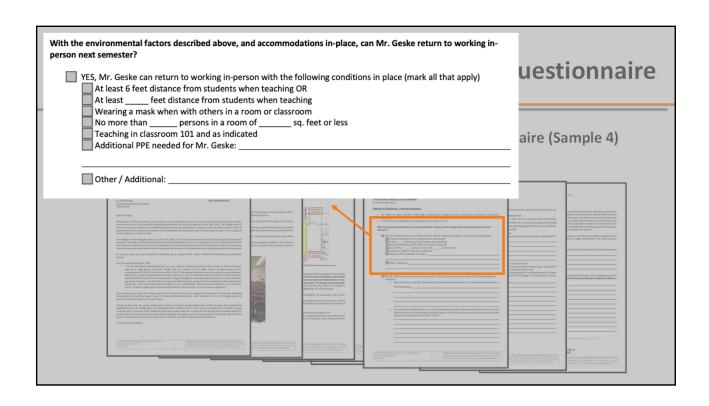






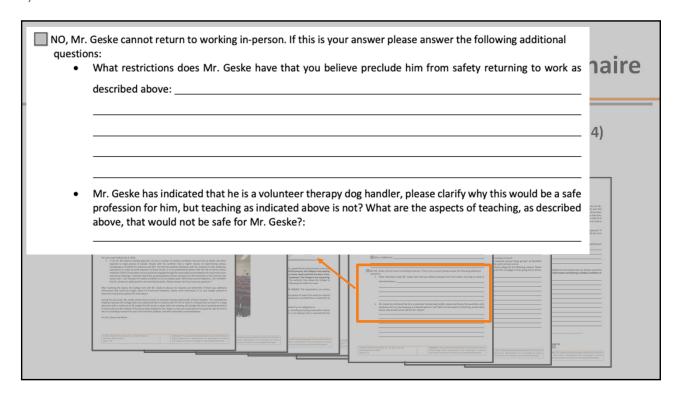
What to Do When Employees Can't (or Won't) Come Back to Campus

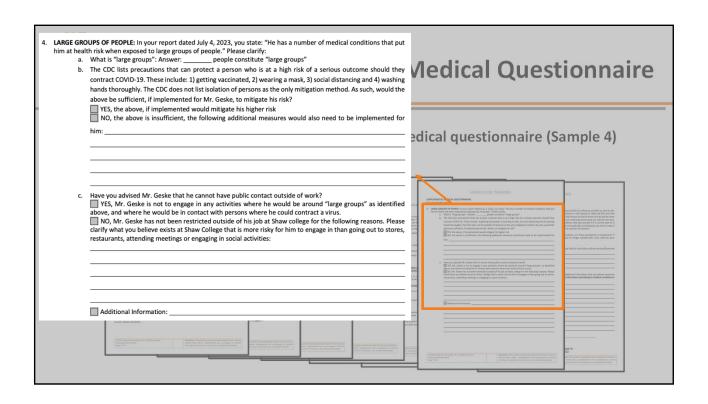






What to Do When Employees Can't (or Won't) Come Back to Campus

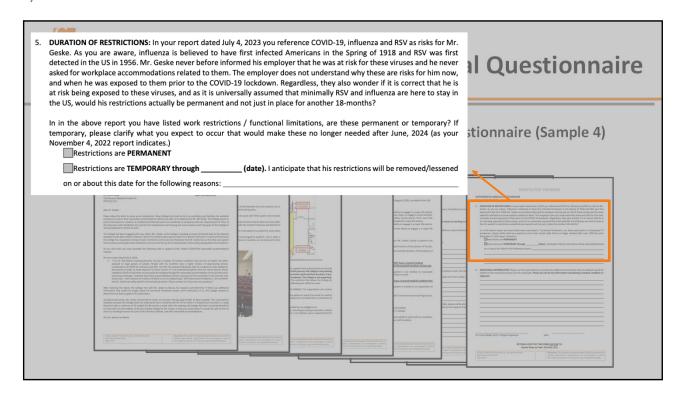






What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw





The Hallway: Door #1



Post Door # 1 Evaluation:

- · Did the Questionnaire come back?
- Is the Questionnaire complete and does it list work restrictions?
- Are there concerns with the legitimacy of the request still?

Follow your established process, will you utilize a Fitness for Duty Examination?

Best Practice Advice: You will need to utilize a Fitness for Duty process to best protect remote work accommodations and the Organization. Decide what you can be consistent with:

- Everyone must be confirmed with a Fitness for Duty if the accommodation would otherwise be reasonable, or
- Only those that don't return the questionnaire and/or where we have concerns about the legitimacy get a Fitness for Duty
- Don't recommend you do a FFD typically if the accommodation is in itself, no reasonable!



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



The Hallway: Door #1



Post Door # 1 Evaluation:

- If the questionnaire/Fitness for Duty report comes back and employee is determined **not to be disabled** or in need of workplace accommodations then,
 - Close down the interactive process with a meeting or a conversation and letter
- If you never got the questionnaire back from the employee's personal medical provider, and the employe's original note just said "recommend remote work" or something similar then,
 - Close down the interactive process with a meeting or a conversation and letter
- If the questionnaire/Fitness for Duty report comes back and the employee is determined to be disabled and in need of workplace accommodations, (in person or remotely), continue in the Interactive Process Hallway
 - Go to Door/Step # 2



Disability Interactive Process Hallway®

Door #1

Gather Data: Obtain Clear Medical Work Restrictions; May determine an Essential Functions Position Analysis® (EFPA®) document needs to be created

Door #2

Research Accommodations: Call/email/discuss with employee and supervisor the restrictions and begin exploring accommodation ideas

Door #3

Schedule Prepare & Hold Meeting: Schedule meeting and invite the right people to attend; confirm attendance in advance; prepare notes for meeting; meet and make decisions

Door #4

Do What You Said You Would Do: After meeting, implement decisions; do what was said would be done



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



The Hallway: Door #2



Engage, Interact and Explore Together

- · Ensure applicant/employee is aware of what was determined by the doctor/health care provider
- Talking and/or informal meeting with applicant/employee to ensure they understand the opinions and are prepared for the possible outcomes at their interactive process meeting
- Seek applicant/employee opinions and interests
 - Research ideas of employee/applicant, department or organization before interactive process meeting
- Update the Supervisor/Manager as to the outcome of Door # 1
- Consult with professionals in the field for assistance to identify reasonable accommodation options
- Make sure that your leadership and counsel are on the same page as HR either in allowing long-term remote work, implementing alternatives you have discovered, or denying the accommodation and starting alternative work, leave and possible medical separation.
- No Decisions, but research options and make sure all parties are aware.



Door # 2 Research

Conducting Door # 2 Work Regarding "In-Person" Duties

- Bring to this evaluation your prior work to determine if all essential functions of the job can be performed remotely
- If no alternative accommodation to fully remote work are found after Door # 1 (questionnaire and possible FFD),
 - Is a fully remote accommodation reasonable? If so, you will have to implement it.
 - If this accommodation is not reasonable, make sure that the highest levels of leadership and your attorney are aware and in agreement of the next steps of the process
 - Will not remove essential job functions
 - When does the employee convert to a full-time leave
 - Alternative work exploration starting
 - Medical Separation (Faculty) or 39-month list (Classified) if no placement is available and employee does not voluntarily resign/retire



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Disability Interactive Process Hallway®

Door #1

Gather Data: Obtain Clear Medical Work Restrictions; May determine an Essential Functions Position Analysis® (EFPA®) document needs to be created

Door #2

Research Accommodations: Call/email/discuss with employee and supervisor the restrictions and begin exploring accommodation ideas

Door #3

Schedule Prepare & Hold Meeting: Schedule meeting and invite the right people to attend; confirm attendance in advance; prepare notes for meeting; meet and make decisions

Door #4

Do What You Said You Would Do: After meeting, implement decisions; do what was said would be done



Scheduling the IPM



Schedule Interactive Process Meeting / Have the Right People Involved in Decisions:

(Sample 7)

- Long-Term decisions:
 - Human Resources
 - Workers' Compensation / Risk Management (optional)
 - Employee's Manager / Supervisor
 - · Employee
 - Employee Representative of choice
 - Facilitator & Note Taker



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



The Hallway: Door #3



At the INTERACTIVE PROCESS MEETING, <u>TAKE NOTES</u>. Notes should include (Sample 8 and 9):

- Purpose of meeting / Reason for Meeting
- Documents relied on (EFPA, Medicals)
- Summaries of discussions between all parties relating to:
 - Modified work
 - Extended leave of absence
 - Alternate work
- Summarize outcomes/decisions or next steps
- <u>Signatures</u> of all attending parties on IPM Notes



Door #3 – Making Decisions at IPM

Factors in assessing reasonableness when considering remote as a reasonable accommodation

- Can they perform their full assignment remotely?
 - · It does not matter if your leadership does not like or prefer remote work, this is an evaluation of what is legally reasonable
 - Are you holding ALL employees in the classification / job type to the same standard? Are non-disabled persons getting more benefits of employment than disabled employees?
- Is there sufficient staff that can support a division of labor that supports all the Department/Division work to get done with some employees working fully remote?
 - Not everyone has to do everything the same, if there are sufficient persons to do the work without impact, you can follow a "first come, first serve" model. The law is NOT "what you do for one, you must do for all."
 - Ex.: 8 people that cover the front desk, are there options to have the front desk covered by the remining 7 with little to no impact to the operations of the office?
 - Do you have a highly remote division where many employees already do all courses remotely? Can you prioritize the disabled over the non-disabled to ensure that the disabled person has the assignment they need?
 - You can revisit the accommodation if course availability changes or workload demands/staffing change and make the accommodation no longer reasonable.



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



Door #3 – Making Decisions at IPM

Factors in assessing reasonableness when considering remote as a reasonable accommodation

- Are there other employees working fully remote in the same classification? If they can, why not this disabled person?
 - Disabled employees have MORE rights to an accommodated/modified schedule or assignment than non-disabled persons do
- If there are essential functions that cannot be performed remotely, these need to be shared verbally, and documented in the meeting notes. Employee responses listened to and responded to during the meeting.
 - · You need to share these and listen to the employee or their union to ensure that you are right
- Does your organization have limits on out of state work, regardless of remote work accommodation reasonableness?
 - Workers' compensation / payroll taxes, medical benefits, etc.



Disability Interactive Process Hallway®

Door #1

Gather Data: Obtain Clear Medical Work Restrictions; May determine an Essential Functions Position Analysis® (EFPA®) document needs to be created

Door #2

Research Accommodations: Call/email/discuss with employee and supervisor the restrictions and begin exploring accommodation ideas

Door #3

Schedule Prepare & Hold Meeting: Schedule meeting and invite the right people to attend; confirm attendance in advance; prepare notes for meeting; meet and make decisions

Door #4

Do What You Said You Would Do: After meeting, implement decisions; do what was said would be done



What to Do When Employees Can't (or Won't) Come Back to Campus

Presented by: Rachel Shaw



The Hallway: Door #4



Post-Meeting Activities / Close Process Correctly

- Place all documents in the employee's accommodations file
 - Process Letters (Summaries of events, meeting invites)
 - Meeting Notes
- Complete Post Meeting Agreements
 - Inform others that need to know of a result
 - Complete post meeting forms, letters, etc.
- Implement the Next Steps of the Interactive Process
 - Implement Reasonable Accommodations
 - Submit retirement or disability paperwork
 - Evaluate alternative work placement
 - Proceed with medical separation, etc.



In Closing...

- 1. Open the Closets: Know if you even can say NO, by researching the realities of who is working/has been working fully remote and why. If others have been allowed to work fully remote, you likely cannot have a blanket NO utilized to evaluate requests.
- **2. Develop Your Process:** Identify from the start: 1) How long will you allow remote work BEFORE you start the long-term disability interactive process? 2) How will you utilize the Fitness for Duty tool?
- **3.** Consistently Apply it: Once you commit to # 2 above, you need to be consistent in applying it.
- 4. **Document it:** Document everything

The above will ensure you make good decisions organizationally and find as many alternative accommodations as possible to best support your students and your campuses.



What to Do When Employees Can't (or Won't) Come Back to Campus



