

THE INDIVIDUAL ARRANGEMENT GUIDE

For HR: the person-by-person conversation the Role Placement Map leaves open

For HR use. Keep separate from role records. This is a guide, not a form. Do not use it, or any copy of it, to collect medical, disability or pregnancy information. Requests of that kind go through your organization's accommodation process (step 2).

1. Two decisions, kept apart

The Role Placement Map (Chapter 15 and Appendix B) places roles. It says nothing about whether a particular person is ready to do a remote-eligible role at a distance, or whether someone needs an individual arrangement. Those are decisions about a person, and they are made separately, with HR, on criteria written down in advance. Keep the two records apart:

The role record (Role Placement Worksheet)	The individual record (held by HR)
Role facts only: scores, zone, who needs to overhear the role, the purpose of its in-person days, review date. Completed by the person who leads the work. No names, no personal circumstances.	Readiness decisions and individual arrangements for a named person: criteria applied, evidence, decision, review date. Kept in HR's confidential records under your organization's retention and access rules, not in managers' own files or on the role worksheet.

2. Route the question before anyone judges it

Most problems start when a question goes down the wrong path. Decide which of these it is first.

If the request or concern involves...	It goes to...
A disability, a medical condition, or pregnancy or a related condition	Your organization's accommodation process, led by HR. In the US this is the ADA's interactive process (and, for pregnancy-related limitations, the Pregnant Workers Fairness Act). The manager's role is to pass the request on promptly, not to ask about a diagnosis or decide it. Nothing about it is recorded on the role worksheet or in a readiness record. Elsewhere, follow the equivalent law and your HR policy.
Caregiving, family responsibilities or leave	HR policy (flexible-working, leave and family policies) and any leave law that applies. Not a readiness judgment, and not recorded on the role worksheet.
Working from a different state, region or country	HR, with payroll, tax and legal: your approved work-locations list. A role's placement in Anywhere does not by itself approve a location.
Whether a person is ready to do a remote-eligible role at a distance	This guide, sections 3 to 5: the manager and HR, on written, job-related criteria.
A preference about days or location within the role's placement	The manager, inside the team's agreed anchor days and the role's zone, with HR checking for consistency across teams.

If a health condition, disability, pregnancy or caregiving need comes up in the middle of a readiness conversation, stop that part of the conversation and route it as above. Do not weigh it in the readiness decision.

3. Judging readiness: job-related criteria, written first

Chapter 15 puts the test plainly: readiness should rest on how the work actually gets done, not on what the role permits. Make that concrete before the conversation, not during it.

- **Write the criteria from the role's outcomes**, before any individual is discussed, and use the same criteria for everyone in that role.
- **Use observable outcomes over a stated period**: work delivered to the agreed standard and on time; responsiveness in the hours the role has agreed; full attention in the meetings and calls the role requires; the tools and working setup the work needs (Chapter 15's examples were people who planned to work from a phone, or took calls while shopping).
- **Leave out what is not job-related**: how often someone is seen, presence words such as "always around" or "visible" (Chapter 21 shows how they creep into ratings), and any assumption about health, age, family or personal circumstances.
- **Give specifics and a fair chance**: examples with dates, the person's own account, clear expectations, support where it would help, and a period after which the decision is revisited.
- **Treat it as a current judgment, not a verdict**: someone who is not ready this year may be ready next year, and someone who has worked well at a distance for years can slip. A struggle by one person is not a reason to move the role (Chapter 15).

4. Document consistently

Record the same headings for every decision, in HR's confidential system:

Role and zone	Reference to the role's placement on the Role Placement Worksheet (not a copy of it).
Criteria applied	The written criteria for the role, and the version and date used.
Evidence period and outcomes	The period reviewed and the observable outcomes relied on, with examples.
Decision	Ready / not yet ready / ready with stated expectations, and the reasons in one or two sentences.
Expectations and support	What would change the decision, and what help is offered.
Review	Review date; who decided; who in HR reviewed it for consistency.
Told to the person	Date the person was told, in writing, which decision was being made and how to ask for a review.

Never record diagnoses, disability, pregnancy, accommodation details or caregiving circumstances under these headings. Accommodation records are kept by HR under the accommodation process, separately.

HR's consistency check: periodically compare readiness decisions across managers, teams and locations, the same way Chapters 21 and 33 recommend checking ratings and promotions by location. A pattern no outcome explains is a reason to look again.

5. Review and appeal

- Tell each person which decision you are making: about the role, or about them (Chapter 15). Put the outcome and the reasons in writing.
- Give a route to ask for a review, to someone in HR or a manager who was not involved, with a timeframe for the answer.
- Make clear that asking for a review, or asking for an accommodation, will not count against anyone, and check that it doesn't.
- Set the review date at the time of the decision, and keep it.

6. Take these to counsel

Appendix C of *The Visibility Trap* lists questions to take to your employment counsel before you adopt a presence policy. For this conversation in particular, ask about:

- your accommodation obligations and process, including telework as a possible accommodation;
- how to keep readiness decisions consistent and well documented, and how to test them for disparate impact;
- timekeeping for non-exempt (hourly) staff working away from the office;
- approved work locations, multistate payroll and tax, and work from other countries;
- any duty to consult a union or works council before changing where and when people work;
- notice and privacy rules for any monitoring, and for the records this process creates.

Not legal advice. This guide is general information to help HR run a consistent process. Employment law differs by country, state and locality and changes over time. Have your employment counsel review your process and records before you use them.