

**PROCESS STEPS FOR RENEWAL OR AMENDMENT OF CARETAKER OCCUPANCY AGREEMENTS:
*CALS Employees Required to Live in UA Leased or Owned Properties – As a Condition of Employment***

	Actions	Responsible
1	Initiate communication of upcoming agreement renewal and amendments to CALS Business Services. * <i>CALS Business Services may also communicate changes such as position title, location, residence which results in modification of Agreement/Addendum(s).</i>	Connie Yazzie, PDC-Real Estate
2	Review or confirm justification and/or amendment changes	CALS Business Services
3	If supported, forward job description (with requirement to live on-site language) to Connie Yazzie, PDC-Real Estate and Stephanie Rosenberg, Office of the General Counsel. Communicate CALS approval, justification, and request to renew Occupancy Agreement or make amendment(s).	CALS Business Services
4	Add information to internal caretaker roster for tracking purposes.	CALS Business Services
5	Communicate result, compensation administration, and next steps to Unit Director	CALS Business Services
6	Occupancy Agreement, Addendum(s) and/or Amendments developed and finalized for signature.	Connie Yazzie, PDC-Real Estate
7	Employee signs documents.	Employee (coordinated by Connie Yazzie with CALS Unit Director or Supervisor)
8	Employee signed documents returned to PDC-Real Estate.	CALS Unit Director or Supervisor
9	Real Estate Director signs agreement.	Real Estate Director (coordinated by Connie Yazzie)
10	Copy of final signed documents returned to CALS Business Services and Office of the General Counsel.	Connie Yazzie, PDC-Real Estate
11	Close file 1) Update caretaker roster 2) Track expiration date of agreement (if applicable) 3) Scan documents to CALS Caretaker file 4) Scan documents to CALS employee file 5) Send copy of documents to Division of HR Employee Records for inclusion to personnel file 6) Send copy to CALS Unit Director or Supervisor for their files and to provide to employee for theirs	CALS Business Services

CALS reserves the right to consult with relevant entities on a case by case basis at any stage of the process e.g. Office of General Counsel, Risk Management & Safety, Planning, Design & Construction-Real Estate, University of Arizona Police Department, Facilities Management, Division of Human Resources, etc.