

Central Washington University Personal Communication Device Procedures

- **PROCEDURE FOR APPROVAL OF PERSONAL COMMUNICATION DEVICES**

Central Washington University's Personal Communication Device Policy (XYZ), authorizes three options related to providing CWU employees access to personal communication devices which are funded (in part of in full) by the University. These options are:

1. The employee may obtain University approval to obtain a University owned device.
2. The employee may obtain University approval to receive an allowance to cover the costs related to the purchase of a personal access plan and a personal communication device, and to utilize that device for both personal and business usage.
3. Employees who require only occasional minimal use of a personal communication device may obtain reimbursement for business use of a personal cellular phone.

These options, combined with the various service levels described in Section 3 of this procedure, result in several service combinations available to CWU employees. A personal communication device may only be authorized to fulfill a valid business need. A "valid business need" is defined as follows:

The need to be readily accessible for contact with the public or with university faculty, staff, or students, coupled with the impracticality of a regular land-line telephone for required or essential business communication needs due to:

- *Frequent travel, working at a remote location, etc.*
- *The need to receive or initiate communication in emergency situations*
- *The need to be accessible and available during working hours (when away from assigned land-line telephone) or during non-business hours by electronic means at all times.*

The following responsibilities and actions are required to request and receive approval for a University provided personal communication device, or to receive a University allowance for use of a personally owned device for University business.

Employee:

- Read Central Washington University's Personal Communication Device Policy (XYZ), and these procedures to fully understand all options, personal responsibilities, tax implications, limitations and other aspects of the option and service level requested.
- Provide immediate supervisor and appointing authority information and documentation of the valid business reason for requiring a personal communication device for CWU work, complete the Personal Communications Device Agreement form, sign, and submit to supervisor for approval.
- If the request is for an allowance for a personally owned device:
 - Assure that the device adheres to all standards established by the ITS Department <LINK> if the device is to be connected to the University's BES or NotifyLink Service
 - Provide immediate supervisor and appointing authority a copy of the service agreement
- If the request is for a University provided device:
 - Once request is approved, work with Telecommunications within the ITS Department to order the device and establish the appropriate and most cost-effective service agreement.
- Comply with Central Washington University's Appropriate Usage of Technology (AUT) guidelines.
- Comply with all applicable laws related to the use of a mobile device while driving.

Immediate Supervisor:

- Evaluate the business need and authorize the most beneficial and economical personal communication device option and plan.
- Approve (as appropriate) the Personal Communications Device Agreement form and forward to employee's appointing authority for approval.
- Make all necessary arrangements for all payments/costs associated with the option and service level requested.
 - Personally owned device: Monthly allowance and central ITS Department annual fees if Service Level 3 is selected.
 - University owned device: Monthly service plan charges, device procurement, and central ITS Department annual fees if Service Level 3 is selected.

Appointing Authority:

- Evaluate and approve request and authorize applicable payments based on the selected option and service level requested.

- Forward to Vice-Presidential level for approval if request is for Service Level 3 for a personally owned device (Option 2).
- Perform an annual review of all devices and allowances within 30 days of the start of the calendar year, to verify that there remains a valid business reason for the allowance. Results of the review are to be maintained by the Business Unit and available for review, as necessary.

Vice-President:

- Evaluate and approve requests for Option 2 (Personally owned device allowance) when Enhanced Service Level 3 or 4 (Direct connection to CWU) is requested.

Information Technology Services Department:

- Provide appropriate service and coordination for all approved Personal Communication Device Agreements
- Identify personal communication device options to supervisor and/or appointing authority and recommend the most beneficial and cost effective solution for CWU.
- Perform annual review of industry pricing and propose adjustments to allowance levels as necessary.
- Assist in transfer of existing devices and phone numbers to employees selecting Option 2, as necessary.

2.0 OPTION 1: UNIVERSITY OWNED DEVICE

An individual is only eligible for a University-owned device if he or she 1) is a full-time or part-time University employee (including student employees), 2) adheres to the procedures as outlined in this policy and to the CWU Appropriate Usage of Technology policy, and 3) has a valid business need for a personal communication device which has been documented, and 4) in the opinion of the employee's appointing authority is needed and requested. Since University owned devices are fully funded by the University, their usage is restricted to University business use only. Personal use of University-owned devices is strictly prohibited and may result in the individual being taxed for the total value of the device and service in accordance with current [IRS guidelines](#).

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Supervisors and appointing authorities may elect to acquire and provide a University owned device for an employee whose job duties necessitate the use of such a device as a valid business need. Assignment of these devices requires prior approval of the employee's appointing authority. The approving department will be responsible for all costs associated with the device, the service plan, and any central costs associated with plans providing direct connectivity to CWU's Blackberry Enterprise Server (BES) or use of CWU's NotifyLink Service.

All CWU provided personal communication devices will be provided by and billed through the Information Technology Services (ITS) Department in accordance with all University and ITS guidelines and procedures related to cellular/mobile and personal communication devices.

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Because the devices are used for University communication only, the department is responsible for the cost and contract obligations of the service plan. Such devices remain the property of the University and must be immediately surrendered to the department upon request of the supervisor or appointing authority. Departmental service is immediately terminated upon cessation of the department need.

Who is eligible for this option? All CWU employees with a valid business need, and with approval from their supervisor and appointing authority, are eligible to have a University provided personal communication device. To request and receive approval for a University provided personal communication device, the Personal Communication Device Agreement (PCDA) <LINK> form must be completed and approved.

3.0 OPTION 2: PERSONALLY OWNED COMMUNICATION DEVICES

An employee who qualifies and has a valid business need may, with approval from his/her appointing authority, choose to receive an allowance (Personal Communication Device Allowance) from the University to pay for the university-related portion of his/her personal communication device charges. An employee is only eligible for this option if he/she meets the eligibility requirements for a University-owned device in Option 1, and if it is determined that there are no security issues with using a personally owned device to conduct University business. An appointing authority may also authorize an initial device reimbursement to the employee, not to exceed 50% of the initial cost of the device, when the service is activated. Employees may request reimbursement, not to exceed 50% of the cost, for a replacement device every 2 years.

The employee's immediate supervisor will determine the most appropriate service type which meets the business communication needs of the university, in collaboration with the employee and with the approval of the appropriate appointing authority. The allowance level approved for the employee will be based on the service plan. Employees who desire a more robust and feature rich plan for their personal usage are responsible for their share of the base plan, and all costs associated with the additional services and features. Employees will provide his or her immediate supervisor documentation that the appropriate level of service is being maintained when requested but no less than on an annual basis. Proof of purchase, contracts, and related documents for personal plans must be retained and made available when requested as part of an internal or external university audit. Any business usage of personally owned communication devices makes the records for that personally owned communication device

subject to public records requests and may be disclosable under the state of Washington public records laws ([RCW 42.56](#)). Plan options will normally fall into one of the following four service categories:

- Voice Only Basic Service: This service level is the most basic plan which provides only limited voice (phone) communication. No data plan is included for access to the Internet, data services, etc. This plan provides basic voice connectivity for individuals who are required to carry a personal communication device primarily for the University's ability to contact them (such as on-call personnel), but where business related use will normally be limited and infrequent.
- Voice Only Extended Service: This service level provides for extended or unlimited voice communication. No data service is included for access to the Internet, data service, etc. This plan is primarily for individuals who are frequently away from their offices, who make/receive extensive business phone calls, and where there is considerable benefit to the University by having these individuals carry these devices.
- Voice and Basic Data Service: This service level includes the features and services of the voice only plan, but includes basic/limited data service for Internet access and other data features provided by the service provider. This plan is intended for individuals who require data (browser, email, etc.) access, but where business related data access will be limited and infrequent.
- Voice and Extended Data Service: This service level includes the features and services of the voice only plan, but also includes unlimited data service for Internet access and other data features provided by the service provider. This plan is intended for individuals who are away from their office areas regularly, and who require extensive data service (browser, email, etc.) access to web content, and other high volume data services.

Monthly Personal Communication Device Allowance: The allowance is based on a monthly schedule as developed and approved by the University, and will be distributed to the employee on a semi-monthly schedule as an addition to the employee's paycheck. All allowances are subject to payroll tax withholdings, and do not qualify as compensation for retirement contribution purposes. Also, the allowance does not constitute an increase in base pay, nor will the allowance be included in any percentage calculations for increase to base pay or establishment of base pay related benefits. The allowance may be changed and/or withdrawn by the University at any time. The allowance will only be paid for the months an employee maintains an appropriate level of service. The employee is responsible to immediately inform his/her supervisor of any lapse of service.

Special Circumstances:

- An employee receiving an allowance is not eligible for the allowance during periods of Leave Without Pay (LWOP) resulting

in the employee being paid for less than 80 hours of work or compensated leave during a pay period.

- Employees who are employed on less than annual appointments (i.e. 10 month contracts) are not eligible to receive the allowance for months not worked/employed.
- The employee is responsible for all costs associated with the replacement of lost, stolen or damaged personally owned devices.

Transfer and Termination: Periodically, employees who are receiving an allowance for a personally owned device will become ineligible for a device because of changes in job requirements, transfers, or as a result of personal circumstances with the employee. Depending on the circumstances related to the change in status, the costs associated with terminating the service may rest with the employee or with the University. Examples which cover several of these circumstances are:

- *Promotion:* If an employee applies and is given a new position which does not provide a personal communication device allowance and the employee chooses to cancel his personal plan, the employee is responsible for any early termination fee associated with the employee's plan and communication device.
- *Transfer:* If an employee is transferred by the university from one position/department to another, the employee is required to work with both units to determine whether the existing allowance agreement will be transferred or terminated. If it is determined that the employee is no longer eligible for the allowance, and the employee chooses to cancel his personal plan as a result, the University will reimburse the employee for any early termination fee associated with the plan as long as the transfer or reassignment was not related to disciplinary or performance related issues.
- *Leaving University Position:* If an employee leaves his/her university position voluntarily or as a result of disciplinary action, CWU will not be responsible for terminating any personal communication plan, nor will CWU be held responsible for any early termination or related costs associated with the employee's plan/contract. Should the employee leave the University as a result of a reduction in force, and chooses to discontinue his/her personal plan within 30 days, the University will reimburse the employee for any early termination fee associated with the device/contract.

Personal Communication Allowance Schedule: The allowance granted to an individual electing to utilize their personally owned device for business purposes is dependent on the need and required communication service level requested by the employee's supervisor and approved by the employee's appointing authority. The allowance schedule is reviewed in January of each year for adjustment based on industry rate changes. Payment of the allowance is the responsibility of the requesting department. The allowance levels are as follows:

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- SERVICE LEVEL 1 (Voice Only Basic Service):
\$35.00/month
- SERVICE LEVEL 2 (Voice Only Extended Service):
\$50.00/month
- SERVICE LEVEL 3 (Voice/Basic Data):
\$70.00/month*
- SERVICE LEVEL 4 (Voice/Extended Data):
\$90.00/month*

* Enhanced basic and extended data service is available which allows direct connectivity to CWU's email/communication services (other than via a browser). If this level of service is required, the employee's department is responsible for payment of all setup/initialization and annual fees associated with the ITS Department to provide connectivity to CWU's BES or NotifyLink Service. Annual costs associated with these services are:

- Blackberry Enterprise Service (BES):
\$125/year
- NotifyLink Service:
\$200/year

Transition from a University device (Option 1) to an Allowance (Option 2):

Personnel assigned a University owned device may choose to transition to a personally owned device. In doing so, the employee may acquire their own device and be reimbursed up to 50% of the cost of the device as outlined above, or they may choose to transfer their current University owned device and/or phone number to their personal account. Transferring CWU mobile devices and/or CWU device numbers to personal accounts must be coordinated with Telecommunications, within the ITS Department. The employee will be responsible for reimbursing the University for the cost of the device based on the following schedule:

- Device < 6 months old:
50% of the CWU purchase price/tax
- Device > 6 months old and < 12 months old:
25% of the CWU purchase price/tax
- Device > 12 months old:
No reimbursement to CWU required

Who is eligible for this option? Due to the additional costs and technology infrastructure associated with this option, eligibility for receiving a Personal Communication Device Allowance is based on the requested Service Level to be utilized on the personally owned device. To request and receive approval for a University provided personal communication device, the Personal Communication Device Agreement (PCDA) <LINK> form must be completed and approved. Eligibility is as follows:

- Service Levels 1 & 2 (Voice Only): All CWU employees with a valid business need, and with approval from their supervisor and appointing authority, are eligible to receive a stipend for utilization of their personally owned device.
- Service Levels 3 & 4 (Voice/Data): All CWU employees with a valid business need, and with approval from their supervisor and appointing authority, are eligible to receive a stipend for utilization of their personally owned device.
- Service Levels 3 & 4 (Voice/Data) with enhanced data service connectivity to CWU: Eligibility for this enhanced service level is authorized for Associate/Assistant Vice-Presidents, Academic Department Chairs, and above; and Emergency Management Personnel. Other individuals requesting this level of service must receive written approval from their Vice-President.

4.0 OPTION 3: REIMBURSEMENT FOR BUSINESS CALLS ON PERSONALLY OWNED DEVICES

University employees who do not qualify for University-owned devices or allowances may submit expense reimbursement requests for occasional, incremental business expenses including certain calls made on their personally owned communication devices. Incremental business expenses are defined as those expenses that result in additional costs that are above and beyond the employee's normal calling plan (i.e. excess minutes, roaming charges, etc.). In order to be eligible for reimbursement an employee would be responsible for:

- Purchasing and maintaining his/her own communication device without assistance from the University.
- Identifying monthly business calls placed/received on the device.
- Documenting the "valid business purpose" for all calls identified.
- Submit documented expenses for reimbursement in compliance with the university procedures. The University will only pay for minutes that are in excess of the base calling plan, and the reimbursement will not exceed the additional charges above the base calling plan. Expenses for minutes included in the base plan, which are used for business purposes, will not be reimbursed.

Who is eligible for this option? All CWU employees are eligible for reimbursement of legitimate business costs associated with their personally owned personal communication device, as approved by their supervisor.

Supporting Documents: