



Acquisition and Use of Cell Phones, Smart Phones & Home Internet Access for University Employees

Policy No.: 900-16 Procedures

Effective: 6/30/12

PROCEDURES:

These procedures apply to all University employees authorized by the President or division Vice President to receive reimbursement for use of portable equipment and/or electronic communication equipment as a condition of employment under Policy #900-16. The President or division Vice Presidents are hereafter referred to as “authorizers.”

These procedures may be revised and are subject to change. Employees will be notified when revisions are made.

General Information Regarding Cell Phones and Smartphones:

1. Multiple monthly cell phone service plans are available to meet the anticipated business needs of the university divisions.
2. Employees authorized to have a state purchased phone may contact Purchasing and Contract Administration to obtain information on discounted plans available for university cell phones. For a current list of CSUN cell phone service plans with estimated costs please contact Purchasing and Contract Administration.
3. Smartphone devices are cell phones that support applications such as email, calendaring, Internet access, and read-access to office documents and PDF files. IT has reviewed and tested a variety of Smartphone devices and has listed those Smartphones that appear compatible with the university email and calendar system. IT has also identified Smartphones that did **not** test well in our CSUN environments.
4. The current list of [CSUN IT-tested Smartphone devices](#). The list of CSUN IT-tested Smartphones will be periodically reviewed and revised as necessary to reflect vendor changes.

OPTION ONE: University-owned Device or University-paid Service:

1. Wireless Device/Service Use Agreement:

When a university-owned wireless device or service is assigned to an authorized employee, The [Wireless Device/Service Use Agreement](#) should be completed and signed by the authorizer. The form should then be submitted to Purchasing and Contract Administration. Purchasing and Contract Administration will acquire the necessary device/service and will assist departments with information on contracts for these devices/services.

2. Accounting Guidelines/Process:

- a. Monthly statements will be sent by Accounts Payable to the authorized employee's approver for review.
- b. When monthly service plan charges exceed the approved amount, the employee's authorizer may certify to Accounts Payable that the excess was due to the conduct of university business, otherwise the employee must reimburse the University for the excess amount.
- c. Personal use of a university-owned device/service will result in the employee being required to reimburse the university for all personal charges on the device and may result in full taxation of the service. (Note: Frequent reimbursements or business related overages will generate a review of the agreement by the authorizer to determine whether the service plan should be changed or usage reduced.) A reimbursement from the employee will be treated as an abatement of cost, using the same chartfields used by Accounts Payable to record the original cost. The [Department Deposit Transmittal Form](#) must be completed and delivered to Accounts Payable before the employee's reimbursement is deposited.

3. University-owned equipment used at employee's home:

- a. Requires the approval of the [Off-Campus Home User Permit](#) by an authorizer. Once the form is signed it should be submitted to Asset Management.
- b. The Permit for home use does not expire, but will be reviewed annually by the authorizer.
- c. The authorizer will notify Accounts Payable if the nature of the employee's responsibilities change and the employee is no longer authorized. The authorizer will also notify Accounts Payable when an employee transfers to another department, and will complete a [Separation/Clearance Form](#) when employment has been terminated.

OPTION TWO: Employee-owned Device or Employee-paid Service:

1. Maximum Reimbursements:

- a. Maximum amounts are based on the levels defined in the policy. Maximum reimbursements may be revised and are subject to change. Employees will be notified when revisions are made.
- b. The amount of expense reimbursement for cell phone or Smartphone service fees is the lesser of the following amounts or the actual monthly amount charged to the employee by their provider:
 - **Level 1: \$75**
 - **Level 2: \$25**
- c. The amount of expense reimbursement for Smartphone data charges is the lesser of the following amounts or the actual monthly amount charged to the employee by their provider:
 - **Level 1: \$50**
 - **Level 2: \$0**

- d. The amount of expense reimbursement for Smartphone purchase is limited to level 1 usage and is the lesser of \$100 plus applicable taxes, or the actual cost incurred by the employee.

2. Exceptions/Changes:

- a. Any exceptions to the expense reimbursement amounts require approval by an authorizer.
- b. Option Two does not require the authorized employee to identify the personal or business use of the device/service.
- c. Any supplemental changes made by the authorized employee (e.g., changes in phone numbers) are the employee's responsibility. Purchasing and Contract Administration can assist authorized employees with transferring their existing university-owned cell phone number to an employee-owned device. The transfer of university numbers to an employee phone number is subject to approval by an authorizer.

3. Reimbursement Process:

- a. Ongoing reimbursement to an authorized employee for university business use of a personal device or service plan requires the following:
 - Approval of the [Wireless Device/Service Reimbursement Form](#) by an authorizer. The form is should be submitted to Accounts Payable.
 - Verification by the authorizer that the authorized employee is incurring the charges reimbursed by the university.
 - The employee shall make available to the university, upon request, records of the business calls necessary to comply with applicable laws and regulations, including but not limited to the California Public Records Act. However, the employee may redact any personal information from the records provided. The employee agrees to retain cell phone bills for thirty (30) days from the date of receipt of said bills by the employee.
 - The authorizer will notify Accounts Payable if the nature of the employee's responsibilities change and the employee is no longer authorized to receive reimbursement. The authorizer will also notify Accounts Payable when an employee transfers to another department, and will complete a [Separation/Clearance Form](#) when employment has been terminated.
 - The employee must reimburse the university for any payments under this type of agreement that occurred after the employee ceased to be authorized for reimbursement or ceased to incur the cost.

4. One-time reimbursement to an authorized employee for university business use of a personal device or service plan requires the following steps:

- a. **Reimbursement under \$50** will be processed through the University Cash Services petty cash system. Complete the [Petty Cash Reimbursement Request Form](#) . Reimbursement exceeding \$50 will be processed through Accounts Payable for issuance of a reimbursement check.
- b. An authorizer can determine if a regular reimbursement plan is appropriate for an employee who requires frequent reimbursement for business use of personal devices/services.

5. Vehicle Safety:

- a. The University cares about employee personal safety and is committed to doing everything possible to prevent workplace accidents and provide a safe working environment. Employees should be aware of and comply with all state and local traffic laws while using a cellular device and operating a vehicle.

6. Implementation:

- a. These procedures will be implemented immediately upon the President's approval of the policy for all employees who are not receiving reimbursements or utilizing university owned phones defined in the policy.
- b. These procedures will be phased in for all existing employees currently receiving reimbursements or utilizing university owned phones and implemented per the following schedule:

MPP Employees – No later than July 1, 2012

Represented Employees – No later than January 1, 2013