

# **University of Notre Dame**

## **Operational Guidelines - Mobile Communications Device Policy**

### **Effective 7/31/2012**

#### **INTRODUCTION**

The purpose of this policy is to state the requirements for employees seeking reimbursement or financial compensation for the business use of their personal mobile communications devices.

The basic premise of this policy is that nearly all employees carry personally-owned mobile communications devices, reducing the need for University-provided or University-funded mobile communications devices.

#### **POLICY STATEMENT**

With very few exceptions, effective July 31, 2012, the University will not provide mobile communications devices to employees. Qualified employees, as outlined in the following sections of this policy, will be offered a stipend through the payroll process to offset the cost of mobile communications devices and related plans (to cover both device acquisition and monthly service).

#### **Mobile Communications Stipend Program Provisions:**

Employees must qualify for the stipend program by meeting established criteria in the definitions section below and carry the recommendation of their supervisor and approval of Vice President, Associate Provost, or Dean.

Program stipends are taxable compensation to the employee, subject to required payroll tax withholdings. Program stipends are not considered additional base pay and thus are not eligible for benefits calculated on base pay.

The monthly program stipend amount will be established and reviewed periodically by the Office of Budget & Financial Planning.

Mobile communications devices are the personal property of employees; the employee is responsible for any loss, theft, or damage.

Mobile communications service contracts are personal to the employee; the University will not service the contract. The employee is responsible for complying with all contract terms, including payment to the service provider.

Employees receiving the program stipend agree to provide the sponsoring department with current contact information within 3 business days of inclusion in the stipend program or within 3 days of a change in that information.

Employees transitioning from University-owned devices to personally-owned devices/plans who wish to keep their device and/or contact number may do so without cost or tax implications (a used device is considered to have minimal or no value).

## Other Considerations

In very limited cases, the University will provide a University-owned mobile communications device to authorized employees or departments as approved by the Executive Vice President or the Provost and subject to periodic renewal. This program will be in lieu of the Mobile Communications Stipend Program.

Employees who incur significant personal communications expense while performing University business (e.g., while traveling internationally) may submit an expense report with proper supporting detail seeking reimbursement of the cost in excess of their normal monthly plan cost.

Any method of payment and/or reimbursement with any type of University funding outside of that provided in this policy (e.g., Pro Card, check requisition for direct payment to vendor, etc.) for mobile communications devices/plans is prohibited.

## DEFINITIONS

Qualified employees	Qualified employees for stipend program must <u>meet at least one</u> of the following criteria:  Employees who travel significantly (on average at least one week per month) AND whose job functions require them to be regularly accessible on an ongoing basis  Safety and emergency personnel as defined by the Emergency Operating Committee  Specific individuals as approved by their Vice President, Associate Provost, or Dean
"Mobile communications devices":	Cellular telephones; smart phones Personal digital assistants (PDA) with e-mail capability Any peripheral equipment such as: batteries, hands-free devices, cases, carrying devices, chargers, and data cabling to employees Home internet plans, data plans for iPads, etc. Air cards – mobile e mail/ internet access cards
Sponsoring Department/Supervisor	The department sponsoring the employee determines the need for employee's participation in this stipend program and provides funding for the stipend  Determine the funding source; providing appropriate FOAPAL to be charged or change in FOAPAL to be charged

## RESPONSIBILITIES

Responsible Party	List of Responsibilities
Employee	<p>Personal tax liability resulting from stipend payments</p> <p>Must provide their sponsoring department with current contact information within 3 days of inclusion in program and/or any change in that contact information</p> <p>Comply with all contract terms with mobile service provider, including payments to service provider</p> <p>Responsible for loss, theft, or damage</p> <p>Submission of expense report (via travelND) seeking reimbursement for significant additional business use expense, if applicable</p> <p>If provided University device; due care of device, return device when requested, avoidance of excessive personal use, etc.</p>
Sponsoring Department	<p>Recommendation of Qualified employees to VP, Assoc Provost, or Dean via the Mobile Communications Device <a href="#">Stipend Request form</a></p> <p>Determine the funding source; providing appropriate FOAPAL to be charged or change in FOAPAL to be charged</p> <p>Conduct an annual evaluation of employee's need for mobile communications device or stipend</p> <p>Notification of change in program participation for employee (e.g., change in job responsibilities, terminating need for stipend) via the Mobile Communications Device <a href="#">Stipend Request form</a></p>
Office of Budget & Financial Planning	<p>Determining and publishing the stipend amount each fiscal year</p>
Payroll Services	<p>Including stipend amounts in employee's regular pay</p> <p>Process additions or discontinuations of stipends upon notification via the Mobile Communications Device <a href="#">Stipend Request form</a></p>
OIT Communications	<p>For departments and individuals to be provided device, sourcing device to provide to employee, providing device to departments and individuals, tracking device, servicing contract, recovering device upon change in circumstances</p>

## PROCEDURES

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Additions/Deletions	The Mobile Communications Device Stipend <a href="#">Request form</a> signed by supervisor and VP/Associate Provost/ Dean will be used to inform Payroll of employee additions/ deletions of individuals to the stipend program, including the addition of or change to the FOAPAL to be charged for that stipend (the FOAPAL charged for employee's salary is the default FOAPAL)
Annual certification	Annually, the EVP and Provost will be provided a list of employees on the stipend program to verify need for continuing mobile stipend or University device for employees
Stipend amount determination	Budget Office to annually determine the appropriate stipend amount
Seek reimbursement for significant personal communications expense	Using <i>travelIND</i> , employee incurring expense submits documentation and purpose to supervisor charging account 7129X with the appropriate Fund-Org-Program designation

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## POLICY ENFORCEMENT

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Violations	<p>It is an explicit violation of this policy to do any of the following:</p> <ul style="list-style-type: none"><li>Use of a University-paid card (ProCard, <i>travelIND</i> Meeting card) for device acquisition or payment of monthly service plans</li><li>Seeking direct payment of a personal contract with a cell phone provider through a check requisition form</li><li>Seeking reimbursement for communications costs when no additional costs were incurred to conduct University business (i.e., employees base plan covered needs)</li><li>Authorizing participation in the stipend plan outside stated guidelines (or spirit of the guidelines)</li></ul>
Enforcement	<p>The employee's supervisor or primary expense report reviewer is responsible to review subordinate's cell phone reimbursement requests via <i>travelIND</i> for appropriateness. Any inappropriate reimbursement submission is to be denied.</p> <p>Accounts Payable performs audits of expense report submissions. Any inappropriate reimbursement request will be denied.</p>

## RELATED DOCUMENTS

Policy or Document	Web Address
Mobile Communications Device Stipend Request form	<a href="http://controller.nd.edu/assets/mobile_device_stipend_form.pdf">http://controller.nd.edu/assets/mobile_device_stipend_form.pdf</a>
Expense reimbursement form	<a href="https://travel.nd.edu/">https://travel.nd.edu/</a>

## CONTACTS

Subject	Office or Position	Telephone Number	Office Email or URL
Policy Rollout and Clarification	Chief Information Officer	(574) 631-9700	<a href="mailto:cio@nd.edu">cio@nd.edu</a>
Policy Enforcement	Controller's Office	(574) 631-6401	<a href="http://controller.nd.edu/">http://controller.nd.edu/</a>
Monthly stipend determination	Budget	(574) 631-9137	<a href="http://budget.nd.edu/">http://budget.nd.edu/</a>
Stipend processing	Payroll Services	(574) 631-7575	<a href="http://controller.nd.edu/about-us/payroll-services.shtml">http://controller.nd.edu/about-us/payroll-services.shtml</a>
Web Address for this Policy		[For University-wide policy, the web address should be the Policy Repository: <a href="http://policy.nd.edu">http://policy.nd.edu</a> ]	