POLICY STATEMENT

Wireless Communications Stipend Policy
SU Policy Number: 406-5

ORIGINATING OFFICE

Telecommunications Office / Information Technologies and Services Division.

PURPOSE

To establish policy and guidelines for the provision of a wireless communications stipend to employees who have documented an official university business need for a communications device and continue to meet this need under the Eligibility Requirements section of this policy.

SCOPE

This policy applies to all faculty, staff, and administrators who, as a part of their official university employment, have a constant and recurring need for using a wireless communications device. The wireless communication stipend is intended to reimburse the employee for the business use of the device. The stipend is not intended to fund the cost of the device nor pay for the entire monthly bill. The assumption is that most employees also use their wireless communication devices for personal calls.

OBJECTIVE

To assist the university in achieving maximum productivity and cost-effectiveness when employing wireless communication technology as a business solution; to comply with IRS Regulations on wireless communications devices as described in special substantial rules applicable to listed property; and effectively manage the reimbursement of costs associated with the business use related to personally owned wireless devices and plans.

DEFINITIONS

Wireless Communication Device. A device that transmits and receives voice, data, and/or text without being physically connected to the university network. This definition includes but is not limited to such devices as cellular telephones, pagers, wireless internet services, wireless data devices, and cellular telephone/two-way devices. This policy does not include radio devices that interface with a defined non-public radio frequency such as the 800 MHz Statewide Radio System.

Wireless Communications Stipend. The wireless communications stipend does not constitute an increase in base pay, nor will it be included in the calculation of percentage increases to base pay. The stipend will be itemized and

reported on employee pay statements and W-2s and subject to withholding taxes.

EFFECTIVE DATE

Policy language as noted below becomes effective January 1, 2009.

POLICY

Eligibility Requirements

1. To qualify for the wireless communication stipend, the employee must have a business need, defined and approved by the supervisor, that includes one or more of the following:

    a. The duties of the position may lead to potentially dangerous scenarios and situations with no other acceptable or reliable means of alternative communications.

    b. The duties of the position require that the employee work regularly in the field and need to be immediately accessible.

    c. The duties of the position are such that immediate emergency response is critical (executive, police, or emergency responder) or the employee is responsible for critical infrastructure or operational support and needs to be immediately accessible at all times (telecommunication, computer, or network responder).

    d. The duties of the position require a significant amount of travel during regular work hours or outside normal hours but related to official university business and access to information technology systems, which in the judgment of the university, render the employee more productive and/or the service the employee provides more effective.

    e. The duties of the position require response and decision making to life-threatening or public safety issues and situations.

    f. The duties of the position make it necessary that the employee be accessible to communicate with senior management at any time.

    g. The President of the University deems it necessary to ensure the flow of information and critical support of the university mission.

Responsibilities of Employees Receiving Stipend

1. When a wireless communication stipend has been approved and provided to an employee for the conduct of official business, the employee must comply with the following:

    a. The employee will provide the phone number to their supervisor or department head/chair within five days of activation and will be available for calls (in possession of the wireless communication device and have it turned on) during those times specified by the appropriate department management.

    b. In most cases, the employee may select any wireless carrier whose service meets the requirements of the job responsibilities as determined by the supervisor or department head. The department head, Director of Telecommunications, and the Vice President for Information Technologies and Services will work together to determine carrier requirements if problems arise or circumstances exist that require a specific carrier/technology be used.

    c. The employee must inform the university immediately when the eligibility criteria are no longer met or within 5 working days if the wireless service has been cancelled.

    d. Management may periodically request that the employee provide a copy of the first page of the phone bill in order to verify that he/she has an active wireless phone plan. Management may also periodically request documentation of substantial business use. At minimum, documentation is required when initially applying for the stipend and annually when the stipend is renewed. The ***Wireless Communications Stipend Status*** form (attached) will be used for the yearly review and re-authorization, or cancellation of allowance.

    e. The employee is responsible for all charges on his/her personal wireless plan, including early termination fees. If the employee leaves the position, he/she continues to be responsible for the contractual obligations of his/her wireless plan.

    f. The employee is personally responsible for complying with international, federal, state, and municipal laws regarding the use of wireless phones and other communication devices while driving. Under no circumstances will Shippensburg University be liable for non-compliance.

    g. The employee should use discretion in relaying confidential business related information over any wireless devices since

wireless transmissions are not secure. (See more on security for wireless communication devices below.)

h. The employee does not need to maintain a log for business and personal phone calls if receiving a wireless stipend.

Stipend Allowances

1. The ***Wireless Communication Device Justification and Acknowledgment Request*** form (attached) defines maximum recommended stipends to be paid to an employee based on current package plans available under current Commonwealth of Pennsylvania contracts for wireless communications devices with Verizon Wireless. Voice, text, and data packages will be approved through normal authorization procedures addressed in this policy. Users will be provided a recommended allowance based on their employment position and anticipated plan requirements as a function of their position. Users that require additional voice minutes, text messages, or data access should prepare written justification through the dean or director that may include specific documentation as to projects or circumstances that require higher than the recommended packages. (These allowances will be reviewed annually and adjusted when necessary.)

2. The ***Wireless Communication Device Justification and Acknowledgment Request*** form (attached) defines recommended allowances for plans based on position/organizational rank. Voice and data packages which will be approved through normal authorization procedures addressed in this policy will be provided a recommended allowance based on their employment position and anticipated plan requirements as a function of their position. Users that require upgraded data plans should prepare written justification through the dean or director that may include specific documentation as to projects or circumstances that require higher than normal voice packages or additional wireless services.

3. In most cases, a stipend for the equipment will not be provided. However, if circumstances exist that require a specific carrier/technology be used, the respective Vice President (in consultation with the department head and Director of Telecommunications) may approve a stipend to off-set the additional cost of this specific equipment.

4. In most cases, a stipend for early termination fees will not be provided. However, if circumstances exist that require early termination of an existing contract, the respective Vice President (in consultation with the President) may approve a stipend to off-set the cost of early termination fees.

IRS Compliant Cell Phone Procedure

Step	Responsibility	PROCEDURE
1.	**Department Head/Chair**	Determines if the employee will be required to conduct University business away from his /her usual University place of work and would need a wireless communication device to accommodate those requirements. Department Head/Chair and the employee secure a ***Wireless Communication Device Justification and Acknowledgement Request Form*** to complete Sections A and B. Forward the signed form to Division Vice President.
2.	**Division Vice President**	Review the Wireless Policy and the ***Wireless Communication Device Justification and Acknowledgement Request Form*** Sections A and B. If you do not approve request, return the form to the Department Head/Chair. If you approve, sign and date Section C and forward to the VP for Administration and Finance.
3.	**VP for Administration/Finance**	Review the ***Wireless Policy and the Wireless Communication Device Justification and Acknowledgement Request Form*** Sections A and B. If you do not approve request, return the form to requesting Division Vice President. If you approve, sign and date Section C and forward to the Computing Technologies Center.
4.	**Computing Technologies Center / Telecommunications**	Based on the information supplied in Sections A and B of the ***Wireless Communication Device Justification and Acknowledgement Request Form***, supply advice on phones compatible with our network and computer systems. Sign and forward the form to Human Resources. Provide information to Administrative Services as needed.
5.		**Human Resources / Payroll** Section B will provide the dollar value to be included in the employee's biweekly pay. Provide information to Administrative Services as needed.

	In collaboration with CTC/Telecommunications review and annually update stipends based on plan costs, levels, and types of services, and gross up. Provide updated stipend information to department heads/chairs and request completed ***Wireless Communication Stipend Status*** forms.
6. Department Head/Chair	Use ***Wireless Communication Stipend Status*** form to conduct yearly review and re-authorization, or cancellation of allowance. Forward the form to Human Resources.

WIRELESS COMMUNICATION DEVICE JUSTIFICATION

AND ACKNOWLEDGEMENT REQUEST FORM

(New and Revisions)

Employee Name (Print): _____

Employee Title: _____

Section A: Justification of Business Need

[ ] The duties of the position may lead to potentially dangerous scenarios and situations with no other acceptable or reliable means of alternative communications.

[ ] The duties of the position require that the employee work regularly in the field and need to be immediately accessible.

[ ] The duties of the position are such that immediate emergency response is critical (executive, police, or emergency responder) or the employee is responsible for critical infrastructure or operational support and needs to be immediately accessible at all times (telecommunication, computer, or network responder).

[ ] The duties of the position require a significant amount of travel during regular work hours or outside normal hours but related to official university business and access to information technology systems, in which the judgment of the university, render the employee more productive and/or the service the employee provides more effective.

[ ] The duties of the position require response and decision making to life-threatening or public safety issues and situations.

[ ] The duties of the position make it necessary that the employee be accessible to communicate with senior management at any time.

[ ] The President of the University deems it necessary to ensure the flow of information and critical support of the university mission.

[ ] In most cases, a stipend for the equipment will not be provided. However, if circumstances exist that require a specific carrier/technology be used, the respective Vice President (in consultation with the department head and Director of Telecommunications) may approve a stipend to off-set the additional cost of this specific equipment.

Section B: Approval / Acknowledgement

Supervisor Signature: _____ Date: _____
Department: _____ Fund Center: _____

Est. Bus. Min.	Plan ID	Est. Business Plan Cost	Gross-Up	Total Stipend [3]
200	1	$23.99	$9.31	$33.30
450	2	$31.99	$12.41	$44.40
900	3	$45.99	$17.84	$63.83
1350	4	$53.73	$20.85	$74.58
Est. Bus. Data				
UNL Data/Web (Smart phone)	5	$22.99	$8.92	$31.91
UNL Data/Web (Tablet)	5.1	$35.00	$13.58	$48.58
Tethered Data[1]	5a	$28.00	$10.86	$38.86
Stand Alone Data[2]	5b	$60.00	$23.28	$83.28
Est. Bus.Txt.				
250	6	$ 4.00	$1.55	$5.55
UNL+ 500	7	$ 8.20	$3.18	$11.38
UNL + 1500	8	$12.40	$4.81	$17.21

Plan selection guidelines:

Employee Rank	**Recommended Plan**
President	3,5,6
Executive Management	3,5,6
Associate VP, Assistant VP, Deans	2,5
Directors, Mid Management	1,5
Staff	1

Check Approved Plan(s)/equipment:

[ ] 1 [ ] 2 [ ] 3 [ ] 4 - Voice Plan
[ ] 5 [ ] 5.1 [ ] 5a [ ] 5b - Data Plan(s)
[ ] 6 [ ] 7 [ ] 8 - Text Plan

[ ] One time equipment purchase approval: $ _____[4]

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[1] Wireless Data Device (e.g., PC) tethered to a cell phone
[2] Wireless Data Device (e.g., PC) not tethered to a cell phone
[3] Stipend will be paid biweekly as monthly stipend multiplied by 12 and divided by 26.08
[4] Employees receiving the Wireless Communications Device stipend are eligible for a replacement equipment stipend up to the cap (currently $120) with justification and approval of supervisor, divisional vice president, and the vice president for administration and finance. This eligibility applies to those employees who have not received a new wireless communication device for at least the last two years.

Employee Name (printed): ____

Signature: ____

Date: ______________________

Section C: Upper Management / Departmental Approvals

Division Vice President:

Name (printed): ____

Signature: ____

Date: ______________________

VP for Administration/Finance:

Name (printed): ____

Signature: ____

Date: ______________________

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Computing Technologies Center / Telecommunications Office must sign off on “DATA” capable phone to ensure compatibility with the University Telecommunications Network, and email system.

Computing Technologies Center /Telecommunications Office

Name (printed): ____

Signature: ____

Date: ______________________

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Human Resources:

Name (printed): ____

Signature: ____

Date: ______________________

Wireless Communications Stipend Status

(This form used by Department Head/Chair for yearly review and re-authorization, or cancellation of allowance)

Employee Name (Print):_____

Please Check the Appropriate line:

____ The employee status remains the same. The allowance for the cellular phone service is to continue.

____ The employee status has changed and the allowance for the cellular phone service is to be discontinued beginning _____, 20____.

Note: any changes in stipend due to changes in plan costs, levels, and types of service, or equipment must be submitted using the Wireless Communications Request forms.

Dept Head/Chair (printed): _____

Signature: _____

Date: _____

Forward the completed form to Human Resources

Human Resources Director (printed): _____

Signature: _____

Date: _____

Human Resources Only	
Archived: _____	Date:_____

Effective10.9.12