



Western Kentucky University

Policy and Procedure For Cellular Allowance

April 1, 2010

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1. Terminology

The term “Western Kentucky University,” “WKU,” and “the University” are used interchangeably. The term “user” and “personnel” refers to the individual or individuals using the cellular phone. The term “RF” refers to the radio frequency; “FCC” refers to the Federal Communications Commission; and “FDA” refers to Food Drug Administration.

2. Purpose and Scope

This policy will greatly simplify the University cell phone program, and result in each user having the freedom of choice and personal responsibility for his or her cell phone plan. The policy will provide protocols, guidelines, and establishes procedures for the authorization, deployment, and use of the cellular allowance/university owned services. The purpose of this policy is to contain costs, ensure departmental and personal accountability/responsibility, and to prevent improper use of cellular phones.

3. Policy

The university will not provide cell phones for the use of individual employees. Employees whose duties and responsibilities require them to maintain significant voice (cell phone) contact with the University while away from the office or to be accessible after normal working hours may be eligible for compensation in the form of a monthly cellular allowance to pay for the business portion of personal cellular service. An employee with a cellular allowance must maintain an active cellular contract for the life of the allowance, or must notify the Chief Divisional Officer or appropriate Vice President, Dean, Director, or Department Head that service is disconnected.

4. General

Mobile (cellular) devices are an effective resource for Western Kentucky University because they enable communication in areas or situations where conventional telephony is not available or is impractical. However, the cost incurred by a mobile device must be weighed carefully against any benefits.

In general, a cellular allowance may be provided to an employee for whom the nature of their work requires wide mobility, immediate or timely response, and/or simultaneous access to voice or data communications (example, but not limited to: University senior staff, directors, deans, technicians).

5. Procedures

5.1. *Cellular Allowance*

Qualified employees whose job duties require the frequent need for cellular service as listed in section 5.3.1, may receive supplemental compensation (in the form of a cellular allowance) to cover business-related use of an individual’s personal cellular service. The policy assumes that for most employees, the device will be used for both business and personal use and it is appropriate for the University and employee to share the overall costs. Thus, the allowance amount is not intended to cover 100% of the monthly service plan’s cost.

Qualified employees are eligible for a \$40.00 allowance for voice and text and/or \$30.00 for data.

Qualified employees are also eligible for up to a \$200.00 equipment allowance once every two years. (See Section 5.3.2)

Cellular allowance may be increased, decreased, or eliminated should the nature of the employee's job changes where a modification to the cellular allowance is required.

Those whom receive an allowance are subject to review by the University to verify the necessity of the cellular allowance. Employees may also be required to provide their detailed cellular bills to the University upon request.

5.2. *Device Types*

Cellular devices are defined as any device that uses a cellular network for communication. This includes but is not limited to voice only devices, voice and data devices, and data only devices. If an employee is using a device such as a 3G modem or an iPad, then that device is applicable for a data only stipend if approved by the department. If a department chooses to procure a data only device for departmental usage, then the service plan for that device may fall under section 8 of this policy.

5.3. *Authorization*

5.3.1. WHO HAS AUTHORIZATION

It is the responsibility of an employee's department/division to determine whether the employee's job requires that a cellular allowance should be granted. The University defines the following business purposes as qualifying instances where a cellular allowance may be granted:

- The employee is responsible in emergency matters where they must be available to be contacted and/or respond in the event of an emergency.
- Employees who are frequently "on call" officially or implicitly and/or need to be contacted in an immediate or timely manner (during or after regular business hours) to respond to situations pertinent to their assigned job responsibilities. If the contact is deemed by the department as occasional usage, reference section 7 of this document.
- Employees who typically work in the field or at job sites where access to electronic communications devices is not readily available.
- Employees who frequently travel or are out of the office and need to be in contact with University personnel or affiliates to conduct University business.

5.3.2. GETTING AUTHORIZATION

The decision to incur business expense for cellular allowances must be evaluated by the department/division from a cost/benefit perspective. Units must consider other viable options such as landline phones, pagers, or other less expensive communication devices.

Authorization is subject to Department Head/Director approval. Upon approval an [EPAF](#) will be created and an approval process, which includes Chief Divisional Officer or appropriate Vice President, Dean, Director, or Department Head, will need to be completed before allowance will take effect.

The employee is responsible for the purchase of the cell phone equipment to be used for basic cell service (most basic cell service plans provide free phones). Costs for cosmetic or technical extras that have no business purpose are the responsibility of the employee. In those circumstances where advanced features such as email and/or calendar integration are required, approval by the Chief Divisional Officer or appropriate Vice President, Dean, Director, or Department Head may be obtained to provide up to \$200.00 equipment allowance.

Requests for equipment allowance will be made via Form 16.

5.3.3. CONTACT INFORMATION

Communication Technologies
Mass Media and Technology Hall Room 276
1906 College Heights Blvd #11072
Bowling Green, KY 42101-1072
(270) 745-6370 Office
(270) 745-6500 Fax
Email: Cellular@wku.edu

5.3.4. Department Responsibilities

Departments/Divisions must conduct annual reviews of both the necessity of and usage type of cellular allowance. The Department may at any time change or eliminate the cellular allowance as necessary.

No organization in the University can extend existing mobile contracts or enter into any new contracts with mobile phone companies, except the University's Communication Technologies Department within the Information Technology Division.

Direct payment for mobile services, other data services, or devices is not allowable on WKU, WKU Foundation, Hilltopper Athletic Foundation, or WKU Research Foundation accounts, except under the agreement listed in section 8 of the document.

5.3.5. Fees for Contract Cancellations

The cellular contract will be the employee's responsibility once the device has been transferred to a personal account, including any charges associated with the phone and any early termination charges. In the event an employee is terminated or laid off, and the employee wishes to discontinue the wireless service, the University may assume early termination

charges. However, if the employee resigns then the employee is responsible for early termination charges.

5.3.6. Discounts for Cellular Service

It is the Universities intent to negotiate discounts with cellular vendors for the procurement of individual cellular service. The department of Communication Technologies will work with various cellular providers to develop discounts that will be passed on to the employees of WKU. Additional information about these discounts can be obtained on the Communication Technologies website at <http://www.wku.edu/cellular> .

6. Employee Cellular Service Problem Resolution

The employee is personally responsible for the equipment and monthly cellular service charges. All support for cellular service is provided by the cellular service company chosen by the employee. The Communication Technologies Department cannot offer support for individually owned cellular devices. The Communication Technologies Department will provide support for University provided software that is used on those devices to synchronize them with University email accounts, calendars or other University systems and services. The qualified employee will be responsible for his/her contract; therefore, the individual will need to contact the cellular provider with any billing/service issues.

7. Employee Reimbursement of Cellular Calls

If a university employee is not eligible for the allowance, such employee may request reimbursement for the actual extra expenses of business calls (but reimbursement for per-minute "air time" charges is limited to the total overage charge shown on the invoice, i.e., expenses for minutes included in the plan will not be reimbursed). The individual should make personal payment to the provider, and then should submit a request for reimbursement to department.

- Example 1: An employee's personal phone has a 600 minute plan that costs \$40.00 (plus fees and surcharges). This month the employee used a total of 300 minutes of which it was determined that 100 of those minutes were business calls for WKU. The calls associated with work did not cause any overage charges on the employees bill, therefore the employee is not eligible to request reimbursement for the calls.
- Example 2: An employee's personal phone has a 600 minute plan that costs \$40.00 (plus fees and surcharges). This month the employee used a total of 650 minutes of which it was determined that 100 of those minutes were business calls for WKU. The calls associated with work did cause the employee to go over on the plan, therefore the employee is eligible to request reimbursement for the calls. The employee may request an amount equal to the 50 minutes of overage charges incurred for the month.

It is recommended for individuals who continually have reimbursable business calls that equal or exceed the monthly cellular allowance to request the cellular allowance from their Chief Divisional Officer or appropriate Vice President, Dean, Director, or Department Head.

8. University Owned Service

The Communication Technologies Department will maintain a university sponsored account that will provide services needed for non-individual use.

8.1. *Departmental*

The Communication Technologies Department, with approval by an appropriate budget authority, can provide departmental wireless devices. A Departmental wireless device is a shared voice/data device that does not leave the campus and is turned in by each employee at the end of his/her shift. Phone bills for departmental wireless devices will be reviewed monthly by department heads to verify business use. The authorizing department will be responsible for all charges incurred by the device.

- Departments must keep a record of all incoming and outgoing calls in a call log; which includes the following information for each call: number called/received, date, time, duration, business/personal, and purpose of call.
- The department of Communication Technologies will request approval of cellular phone records and records of call logs from the responsible department each month.
- IRS policies are clear about personal use of business sponsored cellular devices, therefore the university advises against the use of university sponsored devices for personal use. However if personal use of a university device occurs, the personal use of the wireless device will be reimbursed to the Department by the employee. Departments will be responsible for collecting any reimbursements amounts from employees.
 - Example 1: A departmental phone has a 600 minute plan that costs \$40.00 (plus fees and surcharges). The employee used 300 minutes, but 100 of those were personal. The total bill is \$40.00. The employee should pay one third of the total bill. Use this formula: $100/300 \times \$40.00$. This equals \$13.33 plus the same prorated share of the fees and surcharges.
 - Example 2: A departmental phone has a 600 minute plan that costs \$40.00 (plus fees and surcharges). This month the employee made calls totaling 650 minutes. The total bill is \$57.50 (\$40 plus \$.35 per minute over 600 minutes). Of those minutes, 100 were for personal calls. The employee should pay $100/650 \times \$57.50$. This equals \$8.47 for personal calls. The prorated share of fees and surcharges should also be paid.
- Equipment for departmental cellular/data devices will be purchased at the least possible cost. Free devices should be purchased if possible.
- Noncompliance with this policy will result in termination of the wireless device and service. Department will be responsible for any charges resulting in the termination of service.

8.2. *Loaner*

The Communication Technologies Department, with approval by an appropriate budget authority, can provide loaner wireless devices for use while traveling on business outside the

University. The authorizing department will be responsible for all charges incurred by the wireless device while it is in the possession of the individual approved for its usage. Upon completion of travel, the department must return the wireless device back to the Communication Technologies Department with all call record documentation.

- Individuals using loaner device must keep a record of all incoming and outgoing calls in a call log; which includes the following information for each call: number called/received, date, time, duration, business/personal, and purpose of call.
- The department of Communication Technologies will request approval of cellular phone records and records of call logs from the responsible department when the cellular phone is returned. The entire usage for the device will be billed to the responsible department.
- IRS policies are clear about personal use of business sponsored cellular devices, therefore the university advises against the use of university sponsored devices for personal use. However if personal use of a university device occurs, the collection of the personal usage amounts will be the responsibility of the sponsoring department.
 - Example 1: A loaner phone has a 600 minute plan that costs \$40.00 (plus fees and surcharges). The employee only used 300 minutes, but 100 of those were personal. The total bill is \$40.00. The employee should pay one third of the total bill. Use this formula: $100/300 \times \$40.00$. This equals \$13.33 plus the same prorated share of the fees and surcharges.
 - Example 2: A loaner phone has a 600 minute plan that costs \$40.00 (plus fees and surcharges). This month the employee made calls totaling 650 minutes. The total bill is \$57.50 (\$40 plus \$.35 per minute over 600 minutes). Of those minutes, 100 were for personal calls. The employee should pay $100/650 \times \$57.50$. This equals \$8.47 for personal calls. The prorated share of fees and surcharges should also be paid.
- Equipment for loaner cellular/data devices will be purchased at the least possible cost. Free devices should be purchased if possible.
- Noncompliance with this policy will result in no future access to loaner devices.

9. Cell Phone Use while Driving

Western Kentucky University does not recommend the use of any wireless device while driving. If an employee has an accident while using the wireless device, WKU does not assume responsibility.

While driving, it is recommended that the user pull completely off the road and come to a complete stop in a parking area or other safe place before accepting or placing a call, text, or data.

10. Health Risks Concerning Wireless Device

There is no proven evidence to date that radio frequency (RF) from wireless equipment will cause any health problems. WKU does not assume any responsibility for unknown risk from wireless device use. The Federal Communications Commission (FCC) and the Food Drug Administration (FDA) each regulate wireless devices. The FCC ensures that all wireless devices sold in the U.S. follow safety guidelines that limit RF energy.

11. Misuse of Cellular Service

The misuse of the cellular service-using it in ways inconsistent with University policy or with local, state or federal laws – will result in immediate cancellation of the cellular allowance.

[Cellular Allowance Request Form](#)

[EPAF](#)