

PROVISION OF OR REIMBURSEMENT FOR CELL/SMART PHONE PROCEDURES

General Criteria:

The initiating supervisor should use the following criteria in evaluating the business-related reason for providing a cell/smart phone or reimbursement for a personally owned cell/smart phone to an employee whose job entails the following responsibilities:

- Travel — Represented Employees who frequently travel for business purposes or are out of the office and need to be in contact with faculty, staff, managers, or other University business associates.
- Work Location — With the campus adoption of Zoom phones, work location will include Represented Employees who typically work in the field or at job sites where access to land-based communication devices are not readily available.
- Emergency Response — Represented Employees who need to be contacted and/or respond in the event of an emergency or are required to be available during non-business hours.
- Other justifiable reasons for the need of a cell/smart phone.
- With remote work being voluntary, this is not a valid consideration for a cell/smart phone or reimbursement.

It should be noted that cell/smart phones used for University business can become subjected to the Public Records Act. If such an event occurs, the entire device becomes subject to disclosure.

Option 1: Provision of a Business Use Only University Owned Cell/Smart Phone Plan

Determining the Amount of University **Paid Monthly** Service (University Owned Cell/Smart Phone only):

Follow these steps to identify the appropriate service plan:

- Review the number of minutes/megabytes per month the employee has previously used (if applicable) or is likely to use for business related calls, texts and data.
- Costs for cosmetic or technical extras or upgrades that have no business purpose should not be included.
- From the information provided on the Information Technology website, <http://it.csumb.edu/wireless-phone-service-discounts>, choose the most appropriate plan.

Provision of a Cell/Smart Phone:

- If the University will provide a cell/smart phone, the equipment and service level determined by the department head or supervising MPP must be authorized by the division Vice President or Provost.
- The employee shall complete and sign the University Provided Cell/Smart Phone Employee Agreement section of the University Provided or Reimbursed Cell/Smart Phone Agreement in consultation with his or her supervisor.

- The reviewing/recommending supervisor must provide justification and forward the University Provided or Reimbursed Cell/Smart Phone Agreement through the division's organizational structure to the Vice President or Provost for signature approval.

Option 2: University Reimbursement of an Employee Owned Cell/Smart Phone

Determining the Amount of the Monthly Service Reimbursement:

Follow these steps to identify the appropriate maximum reimbursement dollar range (voice only, voice and text, voice, text and data, or other) and amount:

- Review the number of minutes/megabytes per month the employee has previously used (if applicable) or is likely to use for business related calls, texts and data.
- Costs for cosmetic or technical extras or upgrades that have no business purpose should not be included in the estimate.
- Determine the reimbursement level for the plan that is most reasonably related to the needs of the University's business use below.

Cell/smart phone acquisition and upgrade reimbursements are:

Initial purchase of device:	Not to exceed \$200
Device upgrade - biennial:	Not to exceed \$200

Reimbursement levels for cell/smart phone service plans are as follows:

Voice only:	Actual cost, but not to exceed \$30 per month
Voice and text:	Actual cost, but not to exceed \$60 per month
Voice, text and data:	Actual cost, but not to exceed \$100 per month

Establishing an Initial Reimbursement Agreement:

If an employee, with proper University approval, is to obtain a cell/smart phone, equipment and service reimbursement will be reimbursed at actual cost, not to exceed the reimbursement level determined by the department head or supervising MPP and authorized by the division Vice President or Provost.

The employee is responsible for the purchase of the cell/smart phone,

The employee shall complete and sign the Employee Personal Cell/Smart Phone Reimbursement Plan Agreement section of the University Provided or Reimbursed Cell/Smart Phone Agreement in consultation with his or her supervisor.

The reviewing/recommending supervisor must provide justification and forward the Reimbursed Cell/Smart Phone Agreement through the division's organizational structure to the Vice President or Provost for signature approval.

Renewing an Existing Reimbursement Agreement and Annual Review:

Reimbursement Plan Agreements expire at the end of each fiscal year (i.e. June 30), and must be renewed by June 15th of the expiring fiscal year in order to ensure timely reimbursement payment in the upcoming fiscal year. Consequently, an annual review must be conducted prior to June 15th to determine if the reimbursement should be changed, continued or discontinued.

As part of the annual review, the supervisor shall review employee provided documentation to verify that costs for which the reimbursement is provided are being incurred, and that the reimbursement is not in excess of the actual plan costs. The employee is responsible for maintaining and providing the applicable billing statements/invoices for no more than twelve months.

The renewal process is essentially the same as the initial establishment process. Upon the supervisor's notification to the employee of the results of the review, the employee shall complete and sign the Employee Personal Cell/Smart Phone Reimbursement Plan Agreement section of the University Provided or Reimbursed Cell/Smart Phone Agreement and provide the original to the supervisor.

To renew an existing reimbursement agreement, or if a change in the reimbursement amount is warranted, the reviewing/recommending supervisor must provide justification and forward the University Provided or Reimbursed Cell/Smart Phone Agreement through the division's organizational structure to the Vice President or Provost for signature approval.

Reimbursement Payments:

Monthly reimbursement payments for the fiscal year agreement shall commence on or about July 30th for employees with authorized reimbursement plans received by Accounting by June 30th. The reimbursement payment shall be directly deposited into the employee's identified bank account. (See <http://finance.csusb.edu/direct-deposit-non-payroll> for reformation on non-payroll direct deposits.) A completed Employee Reimbursement Direct Deposit Enrollment & Change Authorization form must be on file in Accounting 30 days prior to the scheduled payment. (See <http://finance.csusb.edu/direct-deposit-non-payroll>)

Transitioning from University Owned Cell/Smart Phones to the Reimbursement Plan:

An employee who currently has cell/smart phone services through the University and is eligible for the reimbursement plan:

- May retain his or her current University cell/smart phone number;
- Can contract directly with the existing provider to have the plan transferred into the employee's name, or contract with a provider of the employee's choice;
- Will need to acquire a cell/smart phone and establish service with a service provider if not already provided a University cell/smart phone or if the cell/smart phone is inadequate for the authorized plan.

In the event that the employee contracts with a new provider or his or her existing cell/smart phone is not compatible with the new service, the previously provided University cell/smart phone should be disposed of in compliance with the policies, standards and guidelines established by the CSU and the University.

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An employee who currently has a University provided cell/smart phone and is not eligible for the reimbursement program may retain the phone and phone number, and have the plan transferred to the employee.

Personal Use:

The cell/smart phone is personally owned and may therefore be used for both personal and business calls. An employee with a cell/smart phone reimbursement must maintain active service for the life of the reimbursement period.

Using a cell/smart phone for business use in ways inconsistent with University guidelines, local laws, state laws or federal laws may result in immediate cancellation of the cell/smart phone reimbursement.

Employee Agreement:

Before receiving any reimbursement payments, an employee must sign the Employee Personal Cell/Smart Phone Reimbursement Plan Agreement section of the University Provided or Reimbursed Cell/Smart Phone Agreement acknowledging the purpose of the reimbursement and his or her responsibilities,

Discontinuance of Reimbursement Plan:

To discontinue an employee's reimbursement plan, the supervisor shall complete the University Provided or Reimbursed Cell/Smart Phone Agreement, marking "Discontinue current reimbursement. . ." in the Justification section, and forward to Accounting for processing. The Vice President or Provost need not approve discontinuance.

Discontinuance shall not be arbitrary. The employee shall be notified at least 30 days in advance of discontinuance, except a separating employee's reimbursement plan shall be discontinued effective on the date of separation.

Disposal of Cell/Smart Phone:

Any planned disposal of a cell/smart phone must be in compliance with the policies, standards and guidelines established by the CSU and the University.

Reimbursement to the University:

If a device is deactivated, the employee is responsible for repaying the University any excess reimbursement payments made to the employee after the deactivation.