



PROCEDURE STATEMENT

Wireless Communications Stipend

ORIGINATING OFFICE

Comptroller's Office

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 April 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.

If the employee doesn't have a sufficient, ongoing need for a wireless communication device and it would not be cost-effective to select even the lowest allowance amount; then the employee, on a quarterly basis, can submit a business reimbursement request form with the appropriate documentation & approval, to the Accounts Payable Office for reimbursement for their 'business-related' expense.

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, in consultation with the Office of Information Technology, will 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 Kutztown 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. A stipend for the equipment will not be provided. If you currently possess a university phone you can sign a license agreement to continue to use that phone, at no cost and the university will assist you to switch that phone to a personal plan. Phone upgrades and other equipment changes are the responsibility of the employee. If you are not going to keep your university provided phone, you must return it to the purchasing department.
4. In most cases, a stipend for early termination fees will not be provided. However, if business circumstances exist that require early termination of an existing contract, the respective Vice President may approve a stipend to off-set the cost of early termination fees.
5. In the event of extraordinary circumstances (such as international travel), employees may submit an overnight travel expense form, seeking reimbursement, for international wireless communication expenses incurred, in excess of the employees monthly wireless communication plan cost.

IRS Compliant Cell Phone Procedure

Step	Responsibility	PROCEDURE
1.	Department Head/Chair	<p>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.</p> <p>Department Head/Chair and the employee secure a <i>Wireless Communication Device Justification and Acknowledgement Request Form</i> to complete Sections A and B. Forward the signed form to Division Vice President.</p>
2.	Division Vice President	<p>Review the Wireless Policy and the <i>Wireless Communication Device Justification and Acknowledgement Request Form</i> Sections A and B.</p> <p>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 Comptroller's Office.</p>
3.	Comptroller's Office	<p>Review the <i>Wireless Policy and the Wireless Communication Device Justification and Acknowledgement Request Form</i> Sections A and B for completion.</p> <p>If complete, sign and date Section C and file the original form in the Comptroller's Office. Forward a copy of the approved form to the Payroll Department.</p> <p>In collaboration with the Assistant Vice President for Administration and Finance 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.</p>
4.	Human Resources / Payroll	<p>Section B will provide the dollar value to be included in the employee's pay once per month. Provide information to the Comptroller's Office as needed.</p>
6.	Department Head/Chair	<p>Use <i>Wireless Communication Stipend Status</i> form to conduct yearly review and re-authorization, or cancellation of allowance. Forward the form to the Comptroller's Office.</p>

**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 Telecommunications Coordinator) may approve a stipend to off-set the additional cost of this specific equipment.

Section B: Approval / Acknowledgement

Department Head/Chair (Print): _____

Signature: _____ Date: _____

Department: _____ Fund Center: _____

Est. Bus. Min.	Plan ID	Est. Business Plan Cost ³		
200	1	\$28.69		
450	2	\$32.79		
900	3	\$49.19		
1350	4	\$65.59		
Est. Bus. Data				
UNL Data/Web	5	\$35.99		
Tethered Data ¹	5a	\$20.00		
Stand Alone Data ²	5b	\$60.00		
Est. Bus.Txt.				
250	6	\$ 5		
UNL+ 500	7	\$10		
UNL + 1500	8	\$15		

Plan selection guidelines:

Position Level	Recommended Plan
President	3,5,6
Executive Management	3,5,6
Associate VP, Assistant VP, Deans	2,5
Directors, Mid Management	2
Staff	1

Check Approved Plan(s)/equipment:

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

I have read and understand the wireless communication device policy and the applicable subscription plan:

Employee Name: _____

Signature: _____

Date: _____

¹ Wireless Data Device (e.g., PC) tethered to a cell phone gains access to the internet through the cell phone

² Wireless Data Device (e.g., PC) not tethered to a cell phone has its own cellular card for direct access to the internet

³ Stipend will be paid monthly

Section C: Upper Management / Departmental Approvals

Division Vice President:

Name: _____

Signature: _____

Date: _____

Comptroller's Office:

Name: _____

Signature: _____

Date: _____

Human Resources:

Name: _____

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.

Department Head/Chair: _____

Signature: _____

Date: _____

Forward the completed form to Human Resources

Comptroller's Office: _____

Signature: _____

Date: _____

Comptroller's Office Only

Archived: _____ Date: _____