



# **Xavier University**

## **University Mobile Device Policy**

**Effective: September 9, 2014**

**Last Updated: September 2014**

**Responsible University Office: Controller's Office**

**Responsible Executive: Chief Financial Officer**

**Scope: Faculty and Staff**

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### **A. REASON FOR POLICY**

Xavier University is establishing a new policy for the use and reimbursement of mobile devices and data service, which will result in each user having both freedom of choice and personal responsibility for their mobile device and service provider. Xavier is converting to a program where each eligible employee will receive a monthly allowance ("stipend") to pay recurring fees on individually owned and purchased mobile devices. The stipend amount will be paid to an employee as compensation for the business use of a personal mobile device rather than the employee receiving a university provided device and/or service plan.

This policy permits the University to issue a monetary stipend to select employees who meet the policy criteria pertaining to the use of mobile devices for University business purposes. If the University department requires the employee to carry a device to perform his/her duties, the employee, with the approval of the supervisor and/or department head, will obtain a personally-owned device, at their own cost, with Xavier providing a monthly allowance to pay towards any recurring service fee. The University will no longer provide devices or contracts to employees.

### **B. POLICY**

**Eligibility Guidelines:** The head of each department shall be responsible for determining those employees who have a legitimate business need for a mobile device stipend. Eligibility is designed for certain employees or groups of employees based on work responsibilities, security or other operational considerations.

For an employee to be reimbursed for the business usage of a mobile device or data plan, the individual must demonstrate that the device/plan is an integral part of their job and that they could not effectively carry out their job responsibilities without it. Only in situations where a mobile device satisfies a clear and substantial job requirement will a mobile device/plan be supported by the University. Examples include:

- The employee's job requires frequent travel off campus.
- The employee's job requires that they work regularly outside their office and need to be immediately accessible.
- The employee's job requires that they need to be immediately accessible outside of normal business hours on a routine basis. (NOTE: the occasional need to be contacted after business hours does not make an employee eligible for the stipend).
- Employee's responsibilities include the management of critical systems or critical decision making from a mobile device.

An employee ceases to be eligible when the employee's job duties change and the supervisor and/or department head determines that the new duties do not support a business need for a mobile device/plan stipend. Eligibility must be renewed at the beginning of each fiscal year.

### **Plan Allowance**

Employees will be responsible for choosing their own voice or data plan as well as their carrier. Because the employee is now personally responsible for the account the employee may use the account for both business and personal purposes. The employee may also, at his or her own expense, add extra services, equipment features or accessories, as desired.

The stipend will be paid each pay period and this monthly cost will be charged against the employee's respective department payroll budget. *This stipend does not constitute an increase to base pay, and will not be included in the calculation of percentage increases to base pay due to annual raises, job upgrades or benefits based on a percentage of salary, etc.*

*The mobile device/plan stipend is not taxable income to the employee as long as proper procedure is followed.*

### **Stipend Options**

The stipend amount will be based on a market rate. The market rate will be reviewed annually by the Purchasing department and typically will be derived by a Group Purchasing Organization contract rate or current market conditions.

- Voice/Text: Covers an employee whose job requires voice or text communication as described in "Eligibility Guidelines" above.
- Voice/Text/Data: Covers an employee whose job requires management of critical systems or decision making from a mobile device.

## **Reimbursement for Mobile Device Hardware**

Employees are responsible for choosing and acquiring their own equipment. The cost of devices and accessories are the responsibility of the employee. Xavier does not pay for or reimburse these costs.

## **Employee Responsibility**

When a mobile device/plan stipend has been approved, the employee must comply with the following:

- Complete a Mobile Device and Data Service Authorization Form annually.
- Provide the mobile phone number to his/her supervisor within five days of activation.
- Be available for calls during those times specified by the supervisor.
- Be responsible for all charges on his/her personal mobile device plan.
- The employee's supervisor and/or department head may terminate the stipend if the employee fails to comply with their responsibilities or does not maintain mobile device service.
- The employee must maintain service, as indicated on the authorization form, throughout the fiscal year.
- Be responsible for complying with international, federal, state, and municipal laws regarding the use of wireless devices while driving. Under no circumstances will Xavier University be liable for non-compliance.

The employee is not required to maintain a log for business and personal phone calls if receiving a mobile device stipend.

## **Reimbursement for Business Calls on Personal Mobile device**

If a University employee's job duties do not include the frequent need for a mobile device, the employee is not eligible for a plan stipend. Such employees may request reimbursement for the actual extra expenses of business mobile device calls. Reimbursement for per-minute "air time" charges is limited to the total overage charge shown on the invoice; expenses for minutes included in the plan will not be reimbursed. The individual should make personal payment to the provider, and submit a request for reimbursement. The reimbursement request needs to include documentation that verifies the business use for each call.

NOTE: International travelers must contact their carrier and obtain costs for coverage while travelling for Xavier approved work. Temporary international coverage, if approved prior to travel, can be expensed on a travel expense form.

## **Support for Mobile Devices**

Support for mobile devices will be provided by the employee's carrier/provider. Configuration information connecting to Xavier e-mail and wireless can be found at the Technology Services Knowledge Base <https://kb.xavier.edu/>. Additional troubleshooting for connection issues to Xavier resources can be requested from the Xavier Help Desk.

## **Shared/Departmental Mobile Devices**

Some departments have the need for a shared mobile device that is used by the 'on duty' staff member. These shared departmental phones are not subject to the mobile device policy. The costs of these devices are to be managed by the department and not assigned to any single employee. Purchasing can assist departments in acquiring and managing these types of devices.

### **C. DEFINITIONS**

**CARRIER/PROVIDER**: A company offering mobile device service. For example, Verizon, AT&T, T-Mobile.

**MOBILE DEVICE**: For the purposes of this policy, the term mobile device will include; mobile devices and smart phones.

**MOBILE DEVICES TIPEND AUTHORIZATION FORM**: Document used to authorize an employee's monthly stipend. The form must be signed by the supervisor and/or department head and submitted on an annual basis.

**STIPEND**: Monthly allowance to compensate employee work-related mobile device usage.

**VOICE/TEXT PLAN**: Plan that provides functionality for phone calls and texts.

**VOICE/TEXT/DATA PLAN**: Plan that provides functionality for sending/receiving e-mails and viewing web pages with a mobile device as well as functionality for phone calls and texts.

### **D. PROCEDURES**

To receive the stipend the employee must review and follow the mobile device stipend procedure found at: <http://www.xavier.edu/ts/Mobile-Device-Stipend-Procedures.cfm>.

Supervisors and department heads are responsible for an annual review of employee business-related mobile device use to determine if existing stipend should be continued, changed, or discontinued.

### **E. EXHIBITS**

Mobile Device Stipend Authorization Form

### **F. HISTORY**

This policy was approved by Cabinet on September 9, 2014.

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**Other applicable policies and/or resources:**

Controller and Director of Purchasing