

Cell Phone and PDA Policy

Purpose

This policy sets forth the circumstances under which the University of Miami ('University') will provide a taxable cell phone allowance or a University provided Personal Digital Assistant (PDA) to faculty and staff whose duties and responsibilities require them to maintain a cell phone or Personal Digital Assistant (PDA) for academic or business use. The processes described in this document will be the only methods used to provide funding for cell phone usage or the provision of PDA services by the University. Other reimbursement methods are not permitted.

Policy

Eligible faculty and staff whose job duties require the frequent need for a cell phone may receive a taxable allowance to cover academic or business-related costs. For eligible faculty and staff requiring a Personal Digital Assistant, i.e., Blackberry, iPhone, etc, the University will continue to procure and own the device and pay the monthly recurring service charges for the use of the PDA for academic or business purposes.

Cell phone allowances or PDA assignments must be authorized by the appropriate Vice President or Dean by completing the Cell Phone/PDA form included at the end of this policy.

I. Cell Phones Allowance Procedures

A. Criteria for Cell Phone Allowance

- The job function of the person requires considerable time outside of assigned office or work areas and/or outside of scheduled or normal work hours (e.g., on-call for critical University services); it is essential to the University that the person be accessible during those times; and the needed interaction cannot be done effectively through less costly means (home phone, beeper, etc.).

B. Determination of Dollar Amount of Allowance for Cell Phone

- The cell phone allowance is intended to defray the cost of conducting University services and may not cover the total cost of a cellular service or usage. The voice-only plan allowance is \$48.00 per month.
- The taxable allowance is paid through payroll and is included in the person's payroll direct deposit. A specific earnings code and object code are used to track this expense.
- The taxable allowance is not included in compensation for purposes of determining University retirement coverage or other benefits. The annual W-2 provided to faculty and staff will reflect the allowance paid and all applicable taxes.

C. Equipment Cost

- The person receiving a cell phone allowance is responsible for the purchase of a cell phone and will not be reimbursed for that cost. Note that most service providers offer free or low cost equipment on promotion.

D. Use of Services

- The person must retain an active cell phone plan as long as an allowance is in place and must disclose the cell phone number to their supervisor and other University personnel as required to complete the requirements of their position. If cell phone service is cancelled, the supervisor and the Payroll office must be notified so the allowance can be terminated.

E. Documentation and Review Requirements

- An approved Cell and PDA Request Form, with appropriate approvals and authorization, must be submitted to the Payroll Department to initiate the payment of an allowance via the payroll system.
- The Vice President or Dean is responsible for an annual review of academic or business-related cell-phone use, to determine if existing cell phone allowances should be continued. Use the Cell and PDA Request Form, to notify the Payroll Department that the allowance needs to be terminated.

II. PDA Assignment Procedures

A. Criteria for the need of a PDA

- The job function requires access to email outside of the office and/or beyond regularly scheduled working hours; and it is *essential* for the University that the person has the ability to receive and send email during those times. Or, at the Miller School of Medicine, the University requires that a particular device be used to enter and/or access clinical data. The University will not support, purchase or reimburse faculty and staff for more than one device.
- Each department is responsible for ensuring the University pays the lowest possible costs for PDAs and recurring service charges by choosing from approved University vendors and plans, reviewing monthly bills, monitoring individual usage, and adjusting individual rate plans as needed.

B. Determination of Dollar Amount for Corporate Paid PDA Service

- The University will negotiate corporate data service for iPhones, Blackberrys, and other PDAs. Departments may choose a plan from the approved list of providers. PDA services from other providers will not be reimbursed.

C. Equipment Cost

- The University will purchase a PDA and accessories from an approved list of vendors and plans and incur no more than \$250 in equipment charges, excluding required licensing and IT setup, for any individual every two years. Any cost in excess of this guideline will be the responsibility of the individual. The department head is responsible for approving the cost of the PDA and ensuring that any excess cost is refunded to the University by the individual. Each individual is responsible for safeguarding University-owned PDA's. If a replacement device is needed before the two-year period is reached, the individual is responsible for the cost of replacing the device if not covered under warranty.

III. Policy implementation transition

Upon implementation of this policy, the following actions will be taken by faculty or staff and the University.

Vice Presidents and Deans will review a listing of all University owned devices and determine who should receive a cell phone allowance or University provided PDA.

Cell Phones

- If it is determined that an individual who has a University paid cell phone does not qualify for an allowance, he or she must cancel the service or convert the existing account to a personal contract. The individual may keep the device for personal use, since in most cases, the used device has nominal value.
- If it is determined that the individual who has a University paid cell phone qualifies for an allowance, the employee is responsible for transitioning the University paid cell phone to individual responsibility.
- Department heads are responsible for assuring their faculty and staff are in compliance with this policy.

PDA's

- If it is determined that an individual who has a University-paid PDA does not qualify for a University-paid device, he or she must cancel the service or convert the existing account to a personal contract. The individual may keep the device for personal use, since in most cases, the used device has nominal value.
- If it is determined that the individual who has a University paid PDA will continue with an existing University contract, the department head is responsible for assuring that the cost of the University paid device, accessories and monthly usage fees do not exceed the limits established by this policy as negotiated and approved by the Purchasing Department. Other features such as games, ring tones, screen savers, etc., which are available at an additional charge, may not be billed or paid by the University.

Cell and PDA Request Form

UM Form 1000

SECTION 1: Faculty/Employee Information		
Faculty/Employee Full Name:	C Number:	Current UM Cellular Phone #
Department Name:	Office Phone #:	UM e-mail address:
SECTION 2: Requested Action (check one)		
<input type="checkbox"/> Approve cellular phone allowance (\$48/mo)	<input type="checkbox"/> Terminate cellular phone allowance	
<input type="checkbox"/> Approve data service and device	<input type="checkbox"/> Terminate data service	
SECTION 3: Justification (check all that apply)		
<input type="checkbox"/> Job function requires considerable time outside of assigned office or work area or beyond normal working hours (i.e. on-call responsibilities for critical University services) and it is essential to the University that the faculty member or employee be accessible by telephone during those times.		
<input type="checkbox"/> Job function requires considerable time outside of assigned office or work area or beyond normal working hours (i.e. on-call responsibilities for critical University services) and it is essential to the University that the faculty member or employee has access to email during those times.		
I hereby certify that all information presented is accurate and that I have read and understand the University's Cell and PDA Policy.		
Faculty/Employee Signature: _____		Date: _____
SECTION 4: Approvals		
Department:	REQUIRES APPROVAL FROM DANIEL J. PALS, SR. ASSOCIATE DEAN FOR FACULTY AFFAIRS AND COLLEGE DIVERSITY	
VP/Dean/ Name:		
Title:		
I have reviewed the job functions of the individual identified in this request form and certify that their job functions meet the criteria for a cellular allowance <u>or</u> data service as described in the Cell Phone and PDA Policy. I hereby authorize the payment of a cellular allowance <u>or</u> data device and service for this individual.		
Signature: _____		Date: _____
Department Account # to pay for charges: _____		

Forward completed form to the Human Resources or Faculty Affairs Office serving your campus.