

TEMPLE UNIVERSITY
BOARD OF TRUSTEES
POLICIES AND PROCEDURES MANUAL

Title: Procurement and Use of Cellular Equipment

Policy Number: 04.76.11

Issuing Authority: Board of Trustees

Responsible Officer: Vice President for Computer and Financial Services, and Chief Information Officer

Date Created: March 11, 2005

Date Last Amended/Reviewed: June 16, 2010

Date Scheduled for Review: April 2014

Reviewing Office: Office of the Vice President for Computer and Financial Services, and Chief Information Officer

Scope of Policy & Rationale

This policy applies to the use of all university supplied cellular devices and cellular usage service, regardless of carrier, effective as of the date of this policy. Department budget unit heads may institute cellular usage policies that are of greater rigor, but not less, than this policy.

I. PURPOSE

This policy sets forth guidelines concerning the procurement and appropriate utilization of university-supplied cellular service. It is intended to minimize the cost of cellular service and reduce the administrative **burden on individual departments.**

II. DEFINITIONS

- a. Accessories – Items such as batteries, belt clips and chargers that are sold by cellular carriers and extend and/or enhance utilization of cellular equipment.
- b. Accounts Payable upload system – An electronic means of requesting payment from Accounts Payable. It is often utilized in payment of large accounts representing the same service type and vendor being billed on the same billing cycle. An electronic spreadsheet is uploaded to accounts payable in conjunction with an authorized memorandum requesting payment.
- c. Cellular equipment – Any device operating on a cellular network, most notably cellular telephones and data-enabled cellular devices (i.e. personal digital assistants and “pocket P.C.s”).
- d. Cellular network – Geographic area divided into “cells” or coverage areas, with each served by base stations that serve to receive and transmit cellular telephone calls.

- e. Cellular service - activation, use, maintenance, and termination of cellular equipment
- f. Departmental Budget Unit Head – The person(s) in each department who have signature authority to authorize or approve the expenditure of university funds.
- g. Early Termination Fees – Charges applied by carriers for termination of cellular service prior to the contractually assigned date (typically one or two years from date of service commencement).
- h. Group Service Plan – A cellular service plan in which many cellular devices share a pooled allotment of minutes.
- i. Individual Service Plan – A cellular service plan in which the minute allotment is applied to only one cellular device.
- j. Landline Telephone – The device utilized for typical telephone connections or plain old telephone service (POTS).
- k. Personal or personal business use – Utilization of university-supplied cellular equipment for any means other than university business.
 - a) University business – Utilization of university supplied cellular equipment to conduct tasks related to an individual’s job duties.

III. PROGRAM SPECIFICS

A. Eligibility and Approval

All Temple University employees, whether full or part-time, with job demands resulting in the performance of university business that cannot be conducted on a landline telephone and/or that require accessibility regardless of time or place are eligible for, but not entitled to, university-supplied cellular service. Requests for cellular equipment and service must be approved by the appropriate Department budget unit head.

University employees, both full and part-time, also have the ability to contract directly with university’s carrier(s) to establish personal cellular service. Upon doing so, the account is established in the employee’s name, invoices are sent directly to the employee’s address by the vendor and the employee bears responsibility for payment. The university makes no endorsement of and bears no responsibility for personal cellular service plans.

B. Use of Cellular Service in Cost Centers Funded by Externally Funded Sponsored Agreements (Grants and Contracts)

Cellular equipment and services are generally not allowable charges on sponsored agreements. In certain circumstances, however, they may be charged against such cost centers consistent with the regulations and guidelines associated with the award. At a minimum, these items must be specified in the budget and approved by the sponsor. In addition, prior internal approval is required by Grant and Contract Accounting (Main Campus) or the Office of Sponsored Projects (Health Science Campus).

C. Equipment Procurement and Plan Selection

Cellular equipment, accessories and plan selections are left to the discretion of departmental budget unit heads. An overview of equipment, accessories and service plan options offered by the university's contracted carrier(s) is available in the Office of Telecommunications. The telecommunications manager is also available for consultation. All cellular equipment and plan purchases must be purchased through the Office of Telecommunications via a request for cellular equipment and service form.

D. Cellular Equipment and Plan Billing

The monthly billing for all cellular equipment and services will be processed and paid by the Office of Telecommunications via the accounts payable upload system. Cost centers will be billed for their respective cellular services.

E. Monitoring Appropriate Usage

The responsibility to monitor usage and ensure its appropriateness resides within the department to which the cellular equipment is assigned. Recommendations for effective monitoring include:

- a. Employee education regarding the use of the cellular equipment.
- b. Provision of a copy of the policy on "Procurement and Use of Cellular Equipment" and signature acknowledgement regarding understanding thereof.
- c. Validation of the legitimacy of calls made to and from the cellular equipment via information presented in the call detail. Notify the telecommunications manager of any issues and/or concerns with monthly invoices or information contained therein.
- d. Collection and deposit of monies owed to the university for usage determined to be non-university related.
- e. Possible disciplinary action or discontinuance of cellular phone authorization as a result of continued misuse or abuse of university-supplied cellular service.
- f. Quarterly evaluation of plan offerings and cellular needs; and modification of service plans and equipment through the telecommunications manager as deemed necessary to achieve the most effective and cost efficient use of cellular phone(s).

F. Personal Calls

Temple University provides cellular equipment and services to employees for the purpose of conducting university business. Situations may arise, however, that necessitate the use of the equipment for personal calls. The university understands the issues attendant to requiring separate cell phones for personal and business use, and the cost/benefit inefficiency of requiring a complete accounting each

month of personal use. To provide for an equitable shared-use arrangement, the following rules will apply:

- A. University-supplied cell phones are to be used primarily for business purposes. The department budget unit head is responsible for assuring that individuals who have university-supplied phones have a legitimate business need for them.
- B. Employees and department budget unit heads are responsible for using university resources as efficiently as possible.
- C. Subject to subparagraph D below, employees who use their university-supplied cell phones for personal use are required to reimburse the university at the rate of 10 cents per minute for total personal usage, or such other rate that the telecommunications manager may establish in writing from time to time.
 - a. Example, employee uses the phone for personal usage on an average for 150 minutes a month. This employee should reimburse the university \$15 per month.
- D. Employees should only reimburse the university for chargeable minutes. Chargeable minutes do not include nights and weekend calls (code L-O) or Verizon to Verizon cell phone calls.
 - a. The following calls are not considered personal usage:
 - i. A brief call home to tell your family that you are late for dinner (or similar).
 - ii. One call per day to home while away on business; as defined in the Travel and Expense policy.
- E. Employees are not required to provide a detailed accounting each month, but are expected to make a reasonable estimate of their average personal use using some objective basis.
 - a. Departmental wide estimates and/or more stringent recordkeeping requirements can be established at the college/unit level.
 - b. Estimates should be self-validated at least once a year.
- F. Once an average is determined, the employee can submit a check each month, or an annual check for the calculated amount.

G. Service Problems, Damage, Loss or Theft of Equipment

In the event of service problems, damage, loss or theft of an employee's university-supplied cellular equipment, please contact the telecommunications manager as soon as possible. Arrangements will be made with the carrier to correct the problem, modify service, order replacement equipment, etc. All charges incurred for replacement or repair will be the responsibility of the employee's department.

H. Termination of Cellular Service

When existing cellular service is no longer deemed necessary, the department is responsible for promptly contacting the telecommunications manager and request termination of the service. The telecommunications manager will contact the carrier regarding the requested termination. Early termination fees may apply.

Procedures

A. Establishing Cellular Service

- a. Determination of Need
 - i. An employee must meet one or more of the following criteria for consideration of cellular service provision:
 - 1. Demand for quick access and response times
 - 2. Required ability to be contacted after normal business hours
 - 3. Significant time spent out of the office
 - 4. Frequent travel for university business
 - 5. Required access to information online when out of the office
- b. Equipment and Plan Selection
 - i. Items to be considered when selecting cellular equipment and service plans:
 - 1. Extent of communications to be conducted via cellular equipment (i.e. light ~400 allotted minutes, moderate ~800 minutes, heavy ~1,200 allotted minutes or intense > 2,000 allotted minutes.)
 - 2. Locale of time spent away from the office (i.e. in the same building, on a Temple University campus, within the region or at a non-regional location.)
 - 3. Scope of calling requirements (i.e. local, regional, national or international)
 - 4. Required utilization of emerging cellular technologies
 - 5. Applicability of individual vs. group service plans
 - ii. The telecommunications manager can make equipment and plan recommendations based upon individual requirements.
- c. Ordering
 - i. University use - Cellular equipment and service are ordered via an authorized request for cellular equipment and service form that is submitted to the telecommunications manager. The telecommunications manager will review the information and place the order with the carrier. Upon receipt of the order, the department will be responsible for picking the equipment up from the Office of Telecommunications.
 - ii. Personal use – Cellular equipment and service are ordered directly from the carrier(s).

B. Cellular Service Management

- a. Cellular Account Information – Upon receipt of an order for cellular service, pertinent identifying data regarding the account is entered into a telecommunications database maintained by the Office of Telecommunications. Account information will be updated periodically to reflect cost center modifications, service termination, etc.
- b. Invoice Payment – All university supplied cellular equipment will be billed to the Office of Telecommunications. Upon receipt of the monthly invoices, the telecommunications manager will expense the charges for each cellular account to their respective cost centers through the accounts payable upload system. All cellular charges, without exception, will be expensed under the account code 7423 – Cellular Phone Services.
- c. Invoice Provision – Monthly invoices for each cellular account will be maintained by the telecommunications manager. Monthly charges and details for each cellular account will be available electronically via FMS. Do not process payment of the invoice copies received from the telecommunications manager.

C. Exceptions

Any exceptions to this policy must be approved by the assistant vice president for telecommunications.

Notes

1. Dates of official enactment and amendments:

Adopted by the vice president for computer & information services on March 11, 2005.

Amended August 25, 2006.

2. History:

Reviewed and reformatted on June 16, 2010

Initial Policy Effective Date:

March 11, 2005

Last Amended:

June 16, 2010

3. Cross References/Appendix:

Travel and Business Related Expense Policy and Procedures

http://www.temple.edu/controller/travel/update_pol.htm