This procedure describes the process to request and approve an allowance from Florida International University for the use of cellular phone devices in order to conduct university business.

Any employee who receives an allowance will be required to have the pertinent contact information (i.e., phone number) published or distributed for University business purposes.

Process

Upon determination that the necessary criteria are met as stipulated in the “Cellular Phone Policy”, the employee and authorized approver will follow the process outlined below:

- Select the most reasonable monthly allowance option, based on the intended usage of the device, from the options in the table below:

<table>
<thead>
<tr>
<th>Plan Option</th>
<th>Allowance Amount</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly cellular phone</td>
<td>$50</td>
<td>Phone usage only</td>
</tr>
<tr>
<td>Monthly text messaging</td>
<td>$10</td>
<td>Unlimited text messaging for cellular phone plans only*</td>
</tr>
<tr>
<td>Monthly cellular data</td>
<td>$50</td>
<td>Data usage only</td>
</tr>
<tr>
<td>Monthly cellular phone/data</td>
<td>$90</td>
<td>Combined voice/e-mail functionality</td>
</tr>
<tr>
<td>Bi-annual phone equipment allowance</td>
<td>$50</td>
<td>n/a</td>
</tr>
<tr>
<td>Bi-annual phone/data equipment allowance</td>
<td>$200</td>
<td>n/a</td>
</tr>
<tr>
<td>Emergency business-related calls**</td>
<td>Actual cost</td>
<td>Employee submits reimbursement form</td>
</tr>
</tbody>
</table>

*Unlimited text messaging is for employees with cellular phones so they may receive text notifications in the event of a failure of critical University services for which they are responsible (i.e., e-mail, internet, Panthersoft).

**Emergency business calls which cause the employee who does not receive a cellular phone allowance to exceed their personal cellular phone plans.

- Complete the Employee Cellular Phone Allowance Agreement form, which is available at [http://cellpolicy.fiu.edu/policies.html](http://cellpolicy.fiu.edu/policies.html) and obtain necessary approvals.

- Based on the type of option approved, the approved form is sent to either payroll or purchasing for processing.

- The Employee Cellular Phone Allowance Agreement form must be reviewed and re-approved each fiscal year to confirm the employee’s eligibility for the cellular plan allowance or the department’s eligibility for the shared cellular phone device.

Employees required to receive FIU e-mail on their wireless handheld devices (e.g., BlackBerry) are responsible for arranging the purchase of the appropriate server license from and software installation by the Division of Information Technology. For new employees, the one-time cost of the associated fees (currently $85) will be paid by their department.

Changes in allowance may be made on an annual basis or as needed based on the employee’s job function.
Departmental Shared Cellular Phone Devices

For departments fulfilling functions related to special events, on-call duty, and maintenance, particularly addressing emergency and after-hours related issues requiring calling capabilities that cannot be addressed with a pager, a departmental shared cellular phone device may be approved as an exception.

The departmental shared cellular phone device will be assigned to one individual within the department to manage and maintain control of the device, including phone assignment and ensuring that the equipment is only used for business purposes. This entails monthly review and maintenance of records which establish the amount, date, place, and business purpose for each business call. A notated copy of the monthly cell phone bill is an example of such a record.

Departmental shared cellular phone devices shall only be used for business purposes, personal use is not permitted. Any employee in violation of this policy must, at a minimum, reimburse the University for the personal phone call. A first time offense will result in a reprimand. A second time offense will result in the employee’s loss of use of the departmental shared cellular phone device.

International Calls on Cellular Devices

For employees who occasionally travel overseas and make or receive calls or send or receive email on their cellular phone devices for FIU business in a foreign country, the cost of their cellular phone calls or data/email access may be reimbursed as part of their travel cost reimbursement. For employees who need to work extensively overseas, an international cellular phone plan to cover overseas phone call and data/email transmission may be approved as an exception. The international cellular phone plan should be cancelled as soon as an employee completes his/her overseas assignment and no longer needs it to conduct FIU business.

Grant Funds

Allowances from grant funds may be given to an employee provided they receive authorization from and follow guidelines established by the Office of Sponsored Research Administration (OSRA).

Nine-month Faculty

Nine-month Faculty will receive a twelve month allowance distributed over the nine-months the faculty member is paid.

Terminations or lay-offs

In the event an employee is terminated or laid-off, the university will pay the penalty for terminating the cellular contract entered as part of an allowance.

Exceptions

Exceeding 450 minutes of the monthly cellular phone plans or requiring placing international phone calls for the purpose of conducting University business are considered exceptions. These exceptions must be authorized by the Provost, Senior Vice President of Finance and Administration and CFO, or the President as applicable. Approved exceptions entitle the employee to receive a monthly cellular phone voice allowance of $100 (a total of $140 with cellular data included) due to the availability of $100 unlimited call plans.

A departmental shared cellular phone device used to fulfill functions as outlined above and in the FIU Cellular Phone Policy is an exception and must be authorized by the Provost, Senior Vice President of Finance and Administration and CFO, or the President as applicable. Approved exceptions entitle the department to purchase the device with a FIU issued credit card (i.e., FIU Pro-card).

Transition

Effective immediately, FIU will no longer purchase any new cellular phone devices or services, nor will any existing cellular phone device contracts be renewed or extended.

Effective immediately upon the approval of this policy, employees with FIU assigned cellular phone devices must make arrangements to transfer their cellular phone billing and contract to their name by July 1, 2008. Employees are encouraged to retain their existing cellular phone numbers. If an employee changes his/her cellular phone number, he/she must notify the university within five (5) days of the change.

For those departments that have an existing contract with a cellular phone vendor, if the transfer will result in a cancellation fee, the existing account shall be transferred to employee names immediately following the expiration of the cancellation provision. For those employees who continue to use University owned cellular phone devices throughout the existing plan, existing payment will continue. Employees must adhere to the following established practice:
• Employees must document personal cellular calls and reimburse the University for the personal calls.
• Department heads must review employee usage of cellular phone devices.
• Department heads must sign-off on employee usage of cellular phones.

FIU Owned Cellular Equipment

After this policy becomes effective, when an employee transfers his/her cellular account from the university to his/her name, if his/her university issued cellular phone device is less than two years old, the employee shall continue to use his/her cellular phone device before the employee is entitled to the bi-annual cellular equipment allowance (i.e., $50 for cellular phone and $200 for a Blackberry or similar voice and data device). When his/her university issued cellular device is more than two (2) years old, the employee may apply for the bi-annual cellular equipment allowance and return his/her FIU issued cellular device to the university. Employees using FIU owned equipment and converting to personally owned contracts may continue to use the existing cellular phone devices while employed by the University. In the event the employee leaves FIU, the cellular phone device must be returned to the department just like any other FIU owned property. Employees may choose to either stay with the current AT&T cellular plan or adopt a new cellular phone plan of their choice. There will be no activation or transfer fee from AT&T when an employee continues to use AT&T as his/her cellular service carrier and continues to use her cellular phone number for converting FIU cellular plan to his/her name. However, If an employee chooses a cellular carrier other than AT&T, there may be an activation fee (usually $35) and the FIU issued AT&T cellular device may not work with other cellular carriers. The existing FIU cellular discounted plan rate with AT&T (i.e., Cingular) will continue and the university will negotiate with other cellular phone carriers to provide options of discounted plan rates to employees. Departments cannot force employees to use a specific cellular carrier or plan.

Examples

Example 1: $50 for cellular phone only plan
Jane Smith currently has an FIU assigned cellular phone (no data service). Immediately after this policy becomes effective, Jane and her supervisor evaluate her eligibility of receiving the cellular phone allowance per the criteria set in the “Cellular Phone Policy”. If she meets the criteria, Jane completes the Employee Cellular Phone Allowance Agreement form from http://cellpolicy.fiu.edu/policies.html. Her supervisor will receive a message requesting approval of the request. Once the supervisor approves the request, the completed form will be forwarded to the Division of Information Technology, which will process the form and implement the allowance in the university’s payroll system. Jane has the choice of either continuing her cellular phone service with AT&T (FIU’s current cellular service vendor) or selecting a new cellular carrier of her choice. In either case, Jane will make the arrangement with her cellular phone service provider to transfer her current cellular phone plan from the university to her own name by July 1, 2008. If she chooses AT&T as her cellular service provider, Jane contacts UTS phone services department at Ext. 7-2284 to obtain the contact information of an AT&T service representative. The AT&T service representative will help her transfer her cellular phone plan to her name and activate her cellular phone plan on July 1, 2008. Her plan cost is as follows:

AT&T Nation 450 w/rollover plan
Original plan price:                      $39.99/month
FIU employee discount:                   -$6.00
FIU employee discount rate:              $33.99/month
Estimated taxes and regulatory fees (20% of the plan):     $6.80/month
Total cost of the plan:                   $40.79/month

Benefits of the plan:
Jane may no longer need to carry two cellular phones (FIU and personal)
Anytime minutes:                           450 minutes/month (may roll over to next month)
Night & weekend free minutes:             5000
AT&T mobile to AT&T mobile:              unlimited
Domestic long-distance:                   free
Domestic roaming:                         free
Additional minutes:                      $0.45/minute
Contract length:                          2 years

Example 2: $90 for cellular phone and data combined plan (e.g., Blackberry service)
John Smith currently has an FIU assigned Blackberry phone and data unit (combined voice and data service). Immediately after this policy becomes effective, John and his supervisor evaluate his eligibility of receiving the cellular phone allowance per the criteria set in the “Cellular Phone Policy”. If he meets the criteria, John completes the Employee Cellular Phone Allowance Agreement form from http://cellpolicy.fiu.edu/policies.html. His supervisor will receive a message requesting approval of the request. Once the supervisor approves the online request, the form will be forwarded to the Division of Information Technology, which will process the form and implement the allowance in the university’s payroll system. John has the choice of either continuing his Blackberry service with AT&T (FIU’s current cellular service vendor) or selecting a new cellular carrier of his choice. In either case, John will make the
arrangement with his Blackberry service provider to transfer his current Blackberry data and voice service plan from the university to his own name by July 1, 2008. (Note the Blackberry service plan needs to use FIU Blackberry server to connect to FIU email.) If he chooses T-Mobile as his Blackberry service provider, John contacts UTS phone services department at Ext. 7-2284 to obtain the contact information of a T-Mobile service representative. The T-Mobile Blackberry service representative will help him transfer his Blackberry service plan to his name and activate his Blackberry phone and service on July 1, 2008. His Blackberry Enterprise Server plan cost is as follows:

BlackBerry Enterprise Server plan (uses FIU Blackberry server to receive FIU email)

Combined voice and data plan package price: $69.99/month
Estimated taxes and regulatory fees (20% of the plan): $14.00/month
Total cost of the plan: $83.99/month
Other possible fee – activation fee (one-time) $35 (one-time)

Benefits of the plan
John may no longer need to carry two cellular phones (FIU and personal)
Anytime minutes: 1000 minutes/month (may roll over to next month)
Night & weekend free minutes: none
T-mobile to T-Mobile: none
Domestic long-distance: free
Domestic roaming: free
Additional minutes: $0.35/minute
Data transfer (email): unlimited in USA
Text messaging: unlimited in USA
Contract length: 2 years

Note: For example 2, AT&T/Cingular rate is $72.99 with 450/month rollover minutes and unlimited data/email connection. There will be no activation fee ($35) for employees to continue to use AT&T as their cellular service carrier.

REASON FOR PROCEDURE (O*)

Please see the FIU Cellular Phone Policy.

RELATED INFORMATION (O*)

Please see the FIU Cellular Phone Policy.

DEFINITION (R)

Cellular phone devices, for the purpose of this procedure, are defined as cellular phones, data card services, personal digital assistants (PDAs), wireless handheld devices (e.g., BlackBerry), satellite phones or other telecommunication devices that provide voice and/or data capabilities with a monthly service.

RESPONSIBILITIES (O)

Employees are responsible for:

- Providing the authorized approver with requested information or documentation to support the expected business use, such as copies of previous cellular phone bills.
- Notifying the authorized approver of significant changes in job function.
- Payment of all amounts due as agreed between the employee and cellular phone device service provider.
- Providing the University with the current access number of the cellular phone device within five (5) working days of activation.
- Notifying the authorized approver within five days of inactivation of the cellular phone device.
- All fees associated with early contract termination.
Authorized approvers are responsible for:

- Determining whether the necessary criteria, as stipulated in the Cellular Phone Policy, qualify the employee to receive an allowance or the department to receive a shared cellular phone device and maintaining the appropriate documentation to support the determination.

- Working with payroll or purchasing to ensure processing of the Employee Cellular Phone Allowance Agreement form.

HISTORY (R*)

Effective Date: July 1, 2008; Revision Date: August 7, 2008.

RESPONSIBLE UNIVERSITY DIVISION/DEPARTMENT (R*)

Division of Information Technology

RESPONSIBLE ADMINISTRATIVE OVERSIGHT (R*)

Network Engineering and Telecommunications Division of Information Technology Florida International University 11200 S.W. Eighth Street, PC 531 Miami, Florida 33199 Telephone Number: (305) 348-2703

The University Policies and Procedures Library is updated regularly. In order to ensure a printed copy of this document is current, please access it online at http://policies.fiu.edu/.

For any questions or comments, the “Document Details” view for this procedure online provides complete contact information.

FORMS/ONLINE PROCESSES (O)

Employee Cellular Phone Allowance Agreement

Link(s) to the above referenced Forms available in the "Document Details" Section of the online version of this policy document.

*R = Required    *O = Optional