

# Mobile Communication Device and Services Policy

Policy Name: Dartmouth Mobile Communication Device and Services Policy

Updated/Reviewed: September 2018

Effective Date: July 1, 2012

Office with Primary Responsibility: Procurement Services

Office with Secondary Responsibility: Controller's Office

## Policy Summary

Dartmouth provides personal communication devices to employees who require them in order to fulfill their job requirements in one of three ways: 1) by issuing Dartmouth owned devices, 2) by providing a communication stipend, or 3) by reimbursing business calls for infrequent users.

Eligibility will be approved within a department or division based on an employee's business need. General guidelines for eligibility include the following:

- Employee is required to be fully accessible, at any time of day, to the public, Dartmouth faculty, students, staff, or alumni by telephone or electronically
- Employee's job requires frequent travel to a remote location or significant time away from their office
- The employee has the need to receive or initiate communications in emergency situations

This is an administrative policy that does not address security and data integrity issues. The Dartmouth Information Security Council determines security policy for communication devices.

## Reason for Policy

The policy is intended to guide individuals and entities within Dartmouth to consistent, clear and fair decisions about and management of devices and plans. In so doing, the policy is expected to support individual and entity effectiveness and productivity at least total cost to Dartmouth.

## Scope: Who should know this policy?

- All individuals who are identified by their department or division leader as needing devices and plans to meet the requirements of their roles.
- All individuals within departments and divisions in supervisory and management positions.

- All individuals within departments and divisions assigned coordinator responsibility for management of devices and plans.
- All individuals in Procurement Services, Controller's Office and Finance Centers responsible for policy compliance and financial transactions.

## **Policy Statement**

The use of a personal communication device by an employee is for the benefit of Dartmouth. All employees who are identified by their department or division leader as needing devices and plans to meet the requirements of their roles are eligible under this policy. Schools and divisions are responsible for decisions on sources of funding.

Specifically identified are the following eligibility requirements:

- Employee is required to be fully accessible, at any time of day, to the public, Dartmouth faculty, students, staff, or alumni by telephone or electronically
- The employee's job requires frequent travel to a remote location off-campus or internationally
- The employee has the need to receive or initiate communications in emergency situations

### For Device and Service Provided by Dartmouth

- Primary purpose and use of the device is for Dartmouth business and personal use is minimal.
- Service plans should be selected based on expected business usage.
- Departments should consider options available from Dartmouth preferred vendors for pooled minutes to provide required service at the lowest cost to Dartmouth.
- If personal use results in plan overages, reimbursement to Dartmouth will be required. Departments will work with Accounts Receivable for collection processes.

### For Communications Service Stipends

- Primary purpose and use of the device is personal, with portion of service regularly used for Dartmouth business.
- The stipend is to help offset the cost of the monthly business usage of a voice and/or data plan.
- The stipend will be set by the department based on estimated regular business usage and current Dartmouth pricing for similar service needs. See current costing for Dartmouth Plans for guidance in setting stipend rate at the end of this document.
- The stipend will be paid through the payroll system as taxable income, but is not included in base pay for purpose of retirement or other benefits.
- Stipends will be enhanced to account for the taxability of the stipend payment.
- Personal equipment and service must be maintained while receiving the stipend.

### Reimbursement for Business Related Calls

- Employees that do not qualify for Dartmouth owned devices or service stipends may submit expense reimbursement requests for occasional, incremental business expenses.
- Incremental business expenses are those expenses that result in additional costs that are above and beyond the employee's normal calling plan (e.g. excess minutes, roaming charges).
- To be reimbursed for calls or service, an employee must document the additional costs incurred and the business purpose.

### Safety and Compliance

- Use of mobile communication devices for calls or texting is prohibited while driving, unless used in a hands free mode.
- Employees must comply with state/local laws governing cell phone use.
- Before using a mobile communication device while driving the driver should find a safe place to pull over or park
- Violation of this policy may lead to disciplinary actions, up to and including termination

### Personal Device and Calling/Data Plans

With a Dartmouth identification card employees may purchase devices and service plans at the institution's preferred vendors at a discount.

### Actions Required:

1. Division heads identify individuals with authority to approve employee communication devices or stipends within their area.
2. Entities (divisions, departments) identify individuals who require devices and plans to fulfill their responsibilities for Dartmouth.
3. Entities identify area coordinators
4. Entities implement pooled minute plans with approved vendors for employees with devices within their areas purchased by Dartmouth. Individual lines may be exempted if it is more economical to do so.
5. Entity leadership identifies standard service plans and devices to be used within their areas.
6. Entity directors or coordinators work with individuals on a regular basis to:
  - determine and manage the individuals' device and plan requirements
  - work with approved provider representatives and with provider reports to:
    - ensure that device and plan meets requirements
    - oversee usage for least total cost
7. Requests for devices, special features, or services above a basic level for voice, data or text should be substantiated by the individual, and approved by the department approver (see #1 above).

#### Who follows:

- All individuals who are required to use mobile communication devices and their supervisors.

#### When policy applies:

- This policy applies to all devices and plans provided by Dartmouth and to mobile communication on personal device costs that are reimbursed by Dartmouth.

#### Major conditions or restrictions:

- Included above.

## **Exclusions / Exceptions**

Individuals with special requirements or exceptional usage patterns (e.g. foreign travel) should work closely with their entity leadership and plan coordinator to ensure that the best plan for those needs is selected and approved.

Departmental or divisional policy regarding issuing mobile communication devices or stipends may be more (but not less) restrictive than Dartmouth policy. For example, a department or division may set a lower dollar amount for stipends based on business requirements or budget restrictions. Approval for mobile communications devices or service is subject to budget availability.

Communications devices and services are normally considered indirect costs for Sponsored Projects and are not allowed as direct charges to grants, unless special circumstances exist. Contact the Office of Sponsored Programs for more information.

## **Definitions**

- Mobile communication device: portable physical device which facilitates communication via voice, data, text, or other visual or auditory formats (e.g. cell phones, PDAs, iphones, ipads, nook, kindles, etc.)
- Service plan: agreement made with service provider covering one or more devices proscribing the limits to device usage (voice, data, text) provided without additional charges
- Entity: the division or department with budgetary and supervisory responsibility for the device and plan

## **Related Information**

- Oversight of this policy shall fall to the entities with budgetary responsibilities for the devices and plans (divisions, departments)

- Management review and oversight should be completed promptly after invoices are available (within 1-2 weeks suggested).
- Procurement department is responsible to assist if the coordinator or individual has provider issues which it cannot resolve
- Security policies affecting mobile communications must be followed

## **Ramifications if policy is breached**

For Devices and Services Provided by Dartmouth:

The device user is responsible to limit use to the business purposes for which it is intended, with limited personal use. The supervisor/coordinator should discuss excessive costs with the individual and determine any further action needed to address the cost overage or misuse. These actions could entail:

- A plan change if requirements have changed
- A change in usage that will eliminate future cost overruns
- A change in future actions that eliminate misuse
- Repayment of the excess charge
- Loss of use of device if circumstances warrant

For Communications Service Stipends

- A change in stipend amount if expected need has changed
- Repayment of stipends received if services not maintained for business use
- Elimination of stipend if circumstances warrant

## **Contacts / Responsibilities**

- Coordinator: the individual within an entity assigned the responsibility of managing the program within the department or division, including device purchase, and plan activation, changes and de-activations
- Contract Manager: the individual within Procurement Services who assists with resolution of provider problems that cannot be addressed by the Coordinator or individual user
- Accounts Payable: Central office responsible for payment of invoices
- Finance Center: School or division financial unit responsible for processing reimbursements to employees
- Payroll Office: Central office responsible for stipends reimbursed through Payroll.
- Employees with communication devices used for Dartmouth business: Users are responsible for understanding the fee structure of their service plan and taking steps to minimize excess costs, especially when traveling and international fees or roaming charges may apply.

# Procedures

## For Device and Service Provided by Dartmouth

- New devices or plans, or changes to plans must be approved by entity supervisor or divisional coordinator and ordered from the provider by the entity coordinator or the individual directly. Procurement to assist if needed. Note: requests to charge devices or service to grants must be pre-approved by OSP (see Exclusions/Exception section above).
- The entity will be billed monthly. It is recommended that the entity pay automatically by P-card to avoid late fees, later seeking adjustment if billing errors are found.
- Entity coordinator reviews monthly bills, works with users to identify and address exceptions and processes bills for payment, if it is determined that automatic P-card payments do not work well for the entity. Costs overages related to an individual may be submitted to Accounts Receivable and billed through that process.
- Users should validate and address any overages or unusual usage peaks, as they affect cost directly or affect total pooled minutes, and reimburse the entity if required.
- Entity coordinators conduct a brief quarterly review with provider representatives to identify and address issues or opportunities. Procurement communicates with representatives quarterly to review status, plans, and changes for all departments.

## For Communications Service Stipends

- The department or division identifies employees eligible for stipends and establishes the appropriate rate based on the expected business need for each employee. See guidance for stipend setting at the end of this document.
- Requests to cover business communications service should be submitted on a Mobile Communications Stipend Request Form, approved by a supervisor and the Divisional Fiscal Officer, and submitted to the appropriate Finance Center.
- The Finance Center will initiate a PA and establish the stipend through payroll.
- Stipend amounts are to be reviewed at least annually to verify the business purpose continues, the amount is appropriate, and the employee has active service.
- Note: Requests to charge communications stipends to grants must be pre-approved by OSP (see Exclusions/Exception section above).

# Forms

- Mobile Communications Stipend Request Form
- Mobile Communications Device Request Form

# Mobile Communications Stipend Request

Name: \_\_\_\_\_

Division/Department: \_\_\_\_\_

Assignment Number: \_\_\_\_\_  
(if unknown, the Finance Center will add the Assignment #)

Chart String: \_\_\_\_\_

End Date:  On-going  
 Specific (enter date) \_\_\_\_\_

Qualifying Reason:  On-Call Responsibilities  
 Frequent travel to a remote location or significant time away from their office  
 Receive or initiate emergency communication

Details: \_\_\_\_\_

Monthly Stipend for Cellular Communications \$ \_\_\_\_\_

I certify that I am using my personal cellular device as described in the Mobile Communications Device and Services Policy as required by my department and am requesting a stipend to offset costs related to business activities. I understand the stipend will be included in my regular paycheck as taxable income.

Requestor: \_\_\_\_\_

Approval  
Supervisor/Department Head: \_\_\_\_\_

Approval  
Department/Division Fiscal Officer: \_\_\_\_\_

\*\*Please forward completed form to your Finance Center.

Updated 10/15

# Mobile Communications Device Request

Name: \_\_\_\_\_

Division/Department: \_\_\_\_\_

Chart String: \_\_\_\_\_

Qualifying Reason:  - On Call Responsibilities

- Frequent travel to a remote location

- Significant time away from the office

- Receive or initiate emergency communication

Details: \_\_\_\_\_

I certify that I am using this Dartmouth owned cellular device as described in the Mobile Communications Device and Services Policy as required by my department. This phone is owned by Dartmouth College and should I leave Dartmouth College the phone will be returned to the department upon my departure.

Requestor: \_\_\_\_\_

Approval

Supervisor/Department Head: \_\_\_\_\_

Approval

Departmental/Division Fiscal Officer: \_\_\_\_\_



# Stipend Guidance

<b>Verizon</b>	<b>Suggested Monthly Stipend</b>
450 talk minutes	21.00
900 talk minutes	31.00
450 talk minutes + text	31.00
900 talk minutes + text	40.00
2GB data	18.00
5GB data	31.00
10GB data	49.00
<b>AT&amp;T</b>	<b>Suggested Monthly Stipend</b>
100 talk minutes	15.00
300 talk minutes	17.00
600 talk minutes	24.00
1000 talk minutes	25.00
300 min talk, unlimited data & text	30.00
400 min talk, unlimited data & text	30.00
600 min talk, unlimited data & text	36.00
1000 min talk, unlimited data & text	45.00
<p><b>Note: The suggested stipends are for new services based on average fees by Dartmouth preferred vendors, and have been adjusted to cover the tax implications of the stipend. Stipend amounts typically stay the same over the life of a telecommunications contract.</b></p>	