

Policy Title: Wireless Communication Stipend Policy for Existing University-issued Cell Phones and Mobile Communication Devices

Responsible Office: Purchasing Office

Effective date: 1/1/17

Scope: This policy applies to University Staff and Administrators

Policy

The University recognizes that there are several employees currently with University-issued cell phones and/or other mobile communication device. Given the ubiquity of these devices and recognizing that they are often used for both business and personal purposes, the University will no longer provide full payment (equipment and/or monthly service plan charges) for existing University-issued cell phones or other mobile communication devices, except for certain positions designated by the respective sector leader as First Responders. Other employees who currently have a University-paid device and/or service plan may be eligible for a Wireless Communication Stipend (WCS) if their sector leader determines that the position requires that the employee be in excessive contact with their supervisor or other University constituents outside of normal business hours for work-related functions and/or emergencies.

Eligibility

Criteria for First Responders

Designated First Responders are employees who have been identified as critical responders by the Sector Leaders (Provost, CFO, General Counsel & EVP for Mission). Due to the nature of their jobs, these employees must be immediately accessible in the event of a University emergency. University First Responders will continue to receive a University-issued cell phone and associated monthly plan.

Criteria for Wireless Communication Stipend

Employees with an existing University-paid cell phone whose position is not considered a First Responder by their sector leader may be eligible to receive a **Fixed Monthly Stipend** of \$50 if their sector leader determines that there is an official business need to be in contact with the employee, above and beyond normal business communications. Normal business communication is considered using a device to communicate occasionally with colleagues or supervisors (both during and after business hours) or for mobile access to University resources, such as email. Employees using cell phones for normal business communication **will not** be eligible for a stipend. **The stipend is intended to reimburse the employee for the business use of the device, not to fund the cost of the device nor pay the entire monthly bill.**

Once approved by the Sector Leader, the stipend will be automatically reimbursed monthly through Payroll. Only one stipend will be given per eligible employee. Employees with University-issued iPads or other tablets will no longer receive payment for these devices. The stipend will not be subject to income tax withholdings. Sector Leaders are responsible for reviewing the eligibility for stipends annually. Any employee receiving a monthly stipend must inform the University when eligibility criteria are no longer met, or when the wireless service has been canceled. Any technical issues that arise should be addressed with the vendor supplying the device.

Policy questions should be directed to the Purchasing Office.

University-issued Cell Phones and Wireless Communication Stipend Policy

FAQ'S

1. Who does this policy apply to?

- University Staff and Administrators.

2. When does the policy go into effect?

- Policy goes into effect on January 1, 2017.

3. Who are First Responders?

- First Responders are employees who have been so identified by their Sector Leaders (Provost, CFO, General Counsel & EVP for Mission).
- Due to the nature of their jobs, these employees must be immediately accessible in the event of a University emergency.
- University First Responders are eligible to receive a University-issued smartphone and associated monthly plan.
- Equipment charges for University issued cell phones are coded to account 6839 – Cell Phone Equipment. The cellular service charges are coded to account 6840 – Cell Phone Service Charges.

4. What phones/accessories will be issued to First Responders?

- First Responders will receive a University-issued smartphone, either from AT&T or Verizon Wireless.
- All accessories plus upgrades will be at the employee's personal expense.

5. How will lost, stolen or broken First Responders phones be handled?

- Repair/replacement of phones expenses will be handled by SJU.

6. What will happen to current University-paid phones that are not issued to First Responders

- An employee may qualify for a Wireless Communication Stipend (WCS):
 - Sector Leaders will determine which employees will be eligible for the WCS and approve a Wireless Communication Stipend Agreement (WCSA) for such employees.
- If the employee doesn't qualify for a WCS, the University-paid service will terminate on **December 31, 2016.**

- Ineligible employees can convert smartphone number to their own personal plan (see “Transfer of Billing Responsibility Process” – pg. 4). SJU will give the device to the employee, but the employee will be responsible for the cost of the monthly service.

7. How do I begin a “Transfer of Billing Responsibility thru AT&T or Verizon Wireless?”

- See AT&T and Verizon Wireless detailed transfer procedures outlined on page 4.

8. What is the criterion to receive a Wireless Communication Stipend?

- Sector Leaders will determine if an employee is eligible for a stipend.
- A **Fixed Monthly Stipend** of \$50 may be issued to employees who have a demonstrated official business need for a smart phone, above and beyond normal business communications.
- **The stipend is intended to reimburse the employee for the business use of the device, not to fund the cost of the device nor pay the entire monthly bill.**

9. How do I obtain a Wireless Communication Stipend Agreement?

- If you are deemed eligible, the agreement will be provided to you by your Sector Leader.

10. Who will review/approve stipend requests/business purpose/justification?

- Your Sector Leader.

11. How much is the monthly Wireless Communication Stipend for eligible employees?

- \$50 per month

12. How will eligible employees receive their Wireless Communication Stipend?

- Stipend will be included in the employee’s paycheck monthly as a non-taxable benefit.
- Stipends will be charged to account 6534 – Wireless Communication Stipend.

13. Will the Wireless Communication Stipend be subject to income taxes?

- The stipend will **not** be subject to income tax withholdings.

14. How many Wireless Communication Stipends can one employee receive?

- Only one stipend will be given per eligible employee.

15. Are there any Early Termination Fees (ETF) and/or penalties of a University-paid cell phone whose contract expiration date is after December 31, 2016?

- There are no termination fees from AT&T or Verizon Wireless.

16. Are SJU employees entitled to any discounts from the vendors if they take over financial responsibility of the smartphone?

- Verizon Wireless offers a 19% discount on monthly service charges and AT&T offers a 20% discount. Employee must provide work email address for verification.

- There are no discounts on equipment charges from Verizon Wireless or AT&T.

17. How will charges for international travel be handled?

- The employee is responsible for activating international service. The University will reimburse the employee for cost of business related calls only. The employee must provide a detailed accounting and reporting of such calls for reimbursement.
- Reimbursement for international calls can be processed via CONCUR.
- Reimbursement is charged to account 6841 – Cell Phone Expense Reimbursement.

18. What happens if a First Responder or Wireless Communication Stipend recipient leaves the University?

- First Responder must return their University-issued phone.
- For those receiving a stipend, the stipend stops when the employee is taken off payroll. The manager will provide Human Resources with a Personal Change Form (PCF) indicating the last day of work and reason the employee is leaving.

19. Does a Wireless Communication Stipend recipient pay for their own cell phone?

- Yes, equipment charges are the responsibility of the employee. It is their property.

20. How will funds previously budgeted for mobile device service be adjusted, once employees in the department have been moved to stipend or cancelled service?

- The Budgeting Office in Business Affairs will adjust budgets accordingly. Please contact Victoria Balkon, Director of University Budgets with any further questions.

21. What happens if the employee needs to pay off equipment charges before getting a new plan?

- In some cases, the cost of the mobile device may have been leased or subsidized over the course of the current plan. Any balances required by the cell providers to pay the balance for the equipment is the responsibility of the employee. This should not be billed back to the University. If the employee determines that they cannot pay the balance, the device must be returned back to the cell provider.

22. How should additional deposits or guarantor requirements for employees creating a new personal account be addressed?

- Employees creating new personal accounts with the providers will be subject to the standard background and credit checks done by the cell providers for all consumers. Any upfront cost for the service will be the employee's responsibility to pay. If the employee does not wish to pay, there are a number of other providers and month-to-month plans that should be evaluated.

23. Can the bill remain under “St. John’s University”, but the employee will be billed directly for service?

- No, all accounts for stipend use must be moved to a personal, consumer account.

24. If an employee is designated a First Responder, what should they do?

- For each employee that is a First Responder, the “First Responder Wireless Communication Agreement” form must be filled out, signed by both the Sector Leader and employee, and returned to AP.

25. When will the stipend be implemented for those employees that have moved their service?

- Payroll will implement the change once the “Wireless Communication Stipend Agreement” has been signed and submitted, along with documentation showing the proof of the transfer.

Transfer of Billing Responsibility Process

For

St. John's University

AT&T:

1. Call the IT Service Desk (ext. 5000), or email SJU Telecommunications team at telecom@stjohns.edu, to have your SJU mobile number released from AT&T. The release is valid for **21 days**.
2. Once released, call AT&T Customer Care at 1-888-444-4410 to complete the Transfer of Billing Responsibility from SJU to your personal account with AT&T (credit check will be performed).
 - a. 20% discount off the primary data charge of any Mobile Share Advantage plan is available for all SJU Employees (please mention Foundation Account Number 2417213).
3. **Please note:** If employee fails to call vendor and take ownership of the number within the three week period (21 days), the service will be terminated.

VERIZON WIRELESS:

1. Verizon Wireless has provided SJU with an "Employee Assumption of Liability" form for SJU to release mobile numbers to employees. The form needs to be filled out by each individual and the "Organization Release of Liability" signed by the budget administrator.
2. Once completed, please **fax** the form to Verizon Wireless @ 910-794-7718.
3. Any questions relating to the form, or mobile number transfer, can be sent directly to our Verizon Customer Service Representative, Leonard Lans, by email Leonard.Lans@VerizonWireless.com and copy Kristen Kassman at Kristen.Kassman@VerizonWireless.com.

If an employee wants to transfer their mobile number from SJU-paid to a personal account with another carrier this is considered a "port". The employee must follow the steps above to have the number released from AT&T or Verizon. Once released, they should call their specific carrier for details on how to transfer the number.