POLICY CONCEPTS: INSTRUCTIONS AND GUIDELINES

All policy proposals – including new policy concepts, proposed revisions, or suggested repeals – must be submitted via the form on page 2 to the Office of the University Secretary with appropriate supporting information and documents. Completed submissions are forwarded to the University Senate (academic policies) or the President's Policy Advisory Council (PAC), which ensures proper routing through the policy-making process. (See UO Policy I.03.01 for more information.)

Please keep the following definition of a university policy in mind as you develop your concept:

A University Policy ("Policy") is a policy that (1) has broad application or impact throughout the University community, (2) must be implemented to ensure compliance with state or federal law, (3) is necessary to enhance the University's mission, to ensure institutional consistency and operational efficiency, or to mitigate institutional risks; or (4) is otherwise designated by the Board [of Trustees] or the President [of the University] as a University Policy.

A policy establishes rights, requirements or responsibilities. Excluded from this definition are things such as, but not limited to, implementation guides, operating guidelines, internal procedures, and similar management controls and tools.

To help facilitate as smooth a process as possible, please consider the following:

1. Consult as many stakeholders as possible *prior to submitting* your concept. A primary role for the PAC is to ensure that appropriate offices, departments or groups are consulted.

2. Run your concept by the Office of General Counsel (OGC) *prior to submission*. OGC review is a required step in policy-making.

3. Please use the proper template – email uopolicy@uoregon.edu to obtain either (a) the new policy template (new proposals) or (b) the Word version of the existing policy in its proper template (for redlines/revisions).

4. A "redlined" version of your concept in Word is required for proposed revisions. This must be done using the appropriate Word version (see #3, above).

5. Include any appropriate related resources that will be useful to those reviewing the concept. Links are preferred, but supplemental documents are of course acceptable for items not online. Examples of such items include any associated procedures or unit level policies (even if in draft form), or other policies or procedures related to, overridden by, necessary as a result of, or otherwise affiliated with your concept;

6. Please submit all documents as individual files.

7. Someone from the responsible office or proposing unit will need to attend a PAC meeting to explain the concept and answer any questions.

Please email uopolicy@uoregon.edu if you have any questions. Thank you!

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Kelly B. Wolf, AVP/Controller
Policy Title & # (if applicable):	IV.06.05 Access to Mobile Technology
Submitted on Behalf Of:	Jamie Moffitt, SVPFA/CFO
Responsible Executive Officer:	Jamie Moffitt, SVPFA/CFO

SELECT ONE: ☐ **New Policy**   ☒ **Revision**   ☒ **Repeal**
Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: X **Yes** ☐ **No**
        If yes, which attorney(s): Reed, Everitt, Price

GENERAL SUBJECT MATTER
Include the policy name and number of any existing policies associated with this concept.
Authorized circumstances for provisioning of mobile technology to university employees.

RELATED STATUTES, REGULATIONS, POLICIES, ETC.
List known statutes, regulations, policies (including unit level policies), or similar related to or impacted by the concept. Include hyperlinks where possible, excerpts when practical (e.g. a short statute), or attachments if necessary. Examples: statute that negates the need for or requires updates to an existing policy; unit level policy(ies) proposed for University-wide enactment; or existing policies used in a new, merged and updated policy.
IV.06.05 Access to Mobile Technology [Revision]
IV.04.04 Payment Options for Mobile Technology [Repeal]

STATEMENT OF NEED
What does this concept accomplish and why is it necessary?
The university is changing its Policies and practices related to employee mobile technology. Provisioning of these devices will be authorized only in limited circumstances.

AFFECTED PARTIES
Who is impacted by this change, and how?
All university employees.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do <u>not</u> provide a list of every individual consulted. Remain focused on stakeholders (e.g. ASUO, Office of the Provost, Registrar, Title IX Coordinator, etc.).)

Name	Office	Date
Jamie Moffitt	SVPFA	July 2025
Mark Schmelz	HR	July 2025
Chris Meade	HR-ELR	July 2025
Karl Scholz	President	July 2025
ULT		July 2025
Kevin Reed, Jeslyn Everitt, Jessica Price	GC	July 2025

Mobile Technology, Access To

Policy Number:

IV.06.05

Reason for Policy:

Establish specific circumstances under which the university may provide mobile technology to employees. This Policy relates to the terms and conditions of employment and this Policy issue is the responsibility of the Office of Human Resources.

Note: The operational aspects of this policy are overseen by Business Affairs.

Entities Affected by this Policy:

All university employees.

Responsible Office:

Vice President for Finance and Administration: 541-346-3003, vpfa@uoregon.edu.

Website Address for this Policy:

https://policies.uoregon.edu/vol-4-finance-administration-infrastructur...

Enactment & Revision History:

29 February 2016 - Policy number changed from 03.05.05 to IV.06.05

28 December 2010 - Approved by the university president

Policy:

- Provision of university funds for employee mobile technology (cellular phones, smart phones, tablets, or similar) is limited to specific circumstances:
    - University employees who are REQUIRED to work in states that have statutes mandating payment/reimbursement of work-related expenses. Requirement to work in that state must be documented in the employee's position description. Employees meeting this circumstance will have their payment processed via Employee Reimbursement (see Procedures below).
    - University employees who are assigned university-owned mobile technology utilized for university business purposes only (e.g., duty phones, on-call phones, etc.) No personal use is allowed on this technology. Payment for this technology will be via Unit Purchase (see Procedures below).

- Provision of university funds for employee mobile technology is prohibited for any other purpose.

- University data and information transmitted or stored on mobile technology is subject to the Minimum Information Security Controls Standard as referenced in Information Asset Classification & Management, Policy IV.06.02.

- University data and information transmitted via mobile technology remain the property of the University of Oregon, subject to all appropriate rules and policies, including those covering public records.

- Any mobile technology that is used to access, transmit, or process university data, regardless of whether that technology is personally-owned or provided by the university, shall be relinquished to the university, upon request, if needed for response to a public records request, subpoena, or other university business purpose.

Procedures:

Employee Reimbursement (when mandated by law in the employee's state of residence)

- The employee's unit processes a reimbursement payment to the employee who, in turn, is responsible for all costs associated with the device and service. Any equipment or accessories purchased by the employee remain the property of the employee at all times.

- The employee payment is not compensation; it is a reimbursement of business-related expense and is processed through the Accounts Payable system. In accordance with Internal Revenue Service guidelines issued in September 2011, the payment is not considered taxable income to the employee.

Unit Purchase

- The university unit purchases the device and pays/administers the service contract.

- The unit retains ownership of the device and maintains inventory controls over the device.

Chapter/Volume:

Chapter 6: Information technology

Reason for Policy

~~This policy creates a framework and general guidelines for determining decision making regarding requirements for mobile technology related to employment activities. This policy relates to the terms and conditions of employment and this policy issue is the responsibility of the Office of Human Resources.~~

~~Note: The operational aspects of this policy are overseen by the Business Affairs Office.~~

Entities Affected by this Policy

~~Employees who require mobile technology to perform job responsibilities.~~

Web Site Address for this Policy

https://policies.uoregon.edu/vol-4-finance-administration-infrastructure/ch-6-information-technology/mobile-technology-access

Responsible Office

Vice President of Finance and Administration: 541-346-3003, vpfa@uoregon.edu.

Enactment & Revision History

29 February 2016 - Policy number changed from 03.05.05 to IV.06.05

28 December 2010 - Approved by the university president

Policy

- ~~Provision of university funds for mobile technology must meet a general need of the university. The dean, director, department and/or other unit head are best suited to determine if a specific employee or job classification requires the use of university sponsored Mobile Technology in their areas, and to what extent. As such, the dean, director, department and/or other unit head have the authority to approve access to mobile technology and payment method. This determination should be reviewed annually and revised if needed. Possible criteria to consider may include (this list is not exclusive):~~

- o Travel: Employees who frequently travel or are out of the office and need to be in contact with employees, clients, managers, or other university associate.
  - o Work Location: Employees who typically work in the field or at job sites where access to electronic and telecommunication devices is not readily available
  - o Emergency Response: Employees who need to be contacted and/or respond in the event of an emergency or are required to be available during non-business hours
  - o Critical Need: Employees who are required as part of their daily responsibilities to be accessible by electronic means when away from their regular work station.
- Final determination of whether other criteria may apply is the responsibility of the senior vice provost for academic affairs for academic personnel and the associate vice president for human resources for officers of administration and classified personnel.
- Responsibility for setting overall guidance regarding mobile technology and determining which payment options and tiers are available is delegated to the vice president responsible for that unit.

Procedures:
Determination of the need for mobile technology should be documented in writing and filed in the employee's personnel file.

Related Resources

NA