

POLICY CONCEPT FORM

Name and UO Title/Affiliation:	Kelly B. Wolf, AVP for Business Affairs and Controller
Current Title/# (if applicable):	06.00.11 Payment Options for Mobile Technology
Submitted on Behalf Of:	BAO
Responsible Executive Officer:	Jamie Moffitt, VPFA

SELECT ONE: New Policy Revision Repeal

Click the box to select

HAS THE OFFICE OF GENERAL COUNSEL REVIEWED THIS CONCEPT: Yes No

If yes, which attorney(s): Kevin Reed, Craig Ashford (Pending)

GENERAL SUBJECT MATTER

Include the policy name and number of any existing policies associated with this concept.

Original Policy was written back in 2010, when Blackberrys were the cutting-edge technology and the IRS hadn't updated its rules since the days of the Motorola Brick Phone. We've been making updates via memo and process changes ever since, but the actual Policy needs revision to match IRS regulations and current UO practice.

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.

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STATEMENT OF NEED

What does this concept accomplish and why is it necessary?

- **Updates all references to other UO Policies and departments**
- **Changes Employee Reimbursement from a payroll-stipend model to an expense-reimbursement model (matches current practice)**
- **Removes references to Central Telecommunication since they no longer administer university-purchased mobile tech**
- **Adds statement re: technology being accessed by the university in case of PRR, subpoena, etc.**
- **Changes payment tiers from a model based upon type of technology to one based upon amount of business-related usage.**

AFFECTED PARTIES

Who is impacted by this change, and how?

Those with mobile technology required for work purposes.

CONSULTED STAKEHOLDERS

Which offices/departments have reviewed your concept and are they confirmed as supportive? (Please do not 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
Business Affairs Mgmt Team		May, 2018
Business Affairs A/P		May, 2018
Network and Telecom Services		May, 2018
Purchasing and Contracting Services		May, 2018
Human Resources		May, 2018

Mobile Technology, Payment Options For

Last Updated:

[05/22/2018](#)

Effective Date:

[07/01/2018](#)

Responsible University Office and Contact Person

[Business Affairs](#)

[Kelly B. Wolf](#)

Reason for Policy:

This policy creates a comprehensive framework and general guidelines for decision-making regarding costs and payment methods for Mobile Technology related to employment activities. This policy is the responsibility of the Business Affairs Office.

Policy Statement:

Purchases of Mobile Technology and/or reimbursement to employees who utilize Mobile Technology to conduct university business are governed by the principles, general considerations, and payment options described below.

General Guidelines

- Cellular phones, smart phones, ~~personal digital assistants~~ and similar devices (Mobile Technology) have become commonplace, are readily available, and are convenient mechanisms to support university business practices.
- Provision of university funds for Mobile Technology must meet a general need of the university. The Dean, Director, Department and/or other Unit Head is best-suited to determine if a specific employee or job classification requires the use of university-sponsored Mobile Technology, and to what extent. Guidelines regarding this determination are available in ~~the~~ Access to Mobile Technology, Policy [IV.06.05](#).
- University data and information transmitted via Mobile Technology remains the property of the University of Oregon, subject to all appropriate rules and policies, including those covering public records.
- University data and information transmitted or stored on Mobile Technology, ~~particularly that data considered protected or sensitive, will be~~ subject to the ~~Baseline Standards of Care detailed in the University of Oregon Information Security Policy which is currently being developed~~ Minimum Security Procedure for Devices with Sensitive Information as referenced in [Data Classification, Policy IV.06.02](#).

Payment Options

Each vice president is authorized to determine which payment options are available to units in his/her portfolio.

- Option 1: Unit Purchase
 - The employing unit:
 - Purchases the device and/or pays for the service contract, based upon unit business needs. Choice of contract for unit-purchased devices is limited to service contracts negotiated by the university ~~or~~ the State of Oregon, or another purchasing consortium. Exceptions may be granted by the appropriate dean ~~or~~ vice president, or senior administrator if an alternate service provider better meets the business needs of the unit.
 - Retains ownership of the device and maintains inventory controls over the device.
 - Administers the service plan for the device, ~~or coordinates administration of the plan through UO Network and Telecommunications Services (NTS)~~.
 - Personal use of a university-purchased device should be minimal. If costs are incurred due to personal use, the employee will be responsible for those costs and will reimburse the university in a timely manner.
- Option 2: Employee Reimbursement Allowance
 - The unit provides an allowance monthly reimbursement payment to the employee who, in turn, ~~purchases a device and/or service contract. The employee owns the equipment and~~ 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.
 - Notwithstanding the above, any Mobile Technology acquired or utilized under this policy shall be provisioned to the university, upon request, if needed for response to a public records request, subpoena, or other university business purpose.
 - The monthly 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 recurring payment is not considered taxable income to the employee.
 - Allowance categories/Payment tiers and maximum amounts are determined in accordance with university guidelines maintained by the Director of Business Affairs Office. These guidelines shall be published annually, periodically reviewed and updated as necessary on January 1.

Tiers/Cost Limitations

Maximum payment amounts (Tiers 1-3) are based upon the median costs of representative voice/data plans plus the allocated cost of an equipment purchase prorated for level of usage.

~~Recommended Representative~~ payment tiers ~~(as of policy publication date):~~

~~Tier 1 – Occasional/Low/Infrequent Use – Example: No contract cellular phones with prepaid or pay-as-you-go minutes – Employee serves in on-call capacity on occasion. \$10.50/month~~

~~Tier 2 – Routine Use – Example: Typical cellular phone plan with unlimited talk, long distance, text – \$46.00/month Employee is expected to be available throughout the work day, either at a fixed workstation or remote locations. Employee uses mobile technology for both voice and data (i.e., email) interactions.~~

~~Tier 3 – High Use – Employee travels frequently or is otherwise away from a university workstation and utilizes mobile technology as a primary means of conducting university business. Advanced Mobile Devices – Example: Blackberry Curve, Apple iPhone – \$103.00/month~~

Tier 4 - International Users and Other Exceptional Circumstances - Example: International roaming service, Satellite Phone service - To be determined on a case-by-case basis

Charges to Grants and Contracts

Payment for Mobile Technology must comply with regulations related to the specific grant or contract. ~~The Office of Research Services and Administration~~ UO Sponsored Projects Services is responsible for communicating the regulations for individual grants and contracts.

Procedures:

For university-purchased Mobile Technology, unit ~~can either contact UO Network and Telecommunication Services for assistance or should~~ follow established unit practice for purchasing/contracting. For employee ~~stipends~~ reimbursement payments, unit should contact ~~UO Payroll~~ BAO Accounts Payable for assistance.

Who is Governed by this Policy:

- Faculty, including instructional and research faculty, who utilize Mobile Technology to perform job responsibilities
- Staff who utilize Mobile Technology to perform job responsibilities
- Other: Student employees who utilize Mobile Technology to perform job responsibilities

Who Should Know This Policy:

- University personnel who utilize Mobile Technology to conduct university business
- Deans, Directors, Department and/or Unit Heads, and Vice Presidents who make decisions regarding employee use of Mobile Technology
- University staff charged with administering this Mobile Technology policy including -supervisors of all personnel who utilize mobile technology

Cross Reference to Related Policies:

[Access to Mobile Technology](#)

Payment Tier Amounts (as of 7/1/17) – Provided as Sample Only

Base case assumption: Smart Phone, Unlimited talk/text, 2-3 Gb of monthly data use, Access fees, Taxes
Base case = \$86/month

Tier 1 – Low/Infrequent Use – 25% of Base Case = \$21.50/month

Tier 2 – Routine Use – 50% of Base Case = \$43/month

Tier 3 – High Use – 100% of Base Case - \$86/month

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