



## Wireless Device Programs

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## Introduction

With the adoption of the [Presidential Directive 2009-06](#) relating to the campus wireless device services, the below guidelines provide detailed information for the three wireless device options; the Employee Allowance Program, University Owned Wireless Devices, and the Occasional Use Reimbursements.

## Applicability

Only university vice presidents have the authority to determine and approve the eligibility and appropriate wireless device option for SJSU employees. University vice presidents have the authority to set standards for what constitutes business purposes.

## Employee Allowance Program

### How the Program Works

An employee who is required by his/her vice president to carry a personal wireless device as part of their job responsibilities may be provided an expense allowance. The allowance will need to be authorized using the [Authorization for Business Related Wireless Service](#) form signed by the employee, the employee's manager and the division vice president. Semi-annual review of wireless device allowance will be required by each vice president. The semi-annual review will be conducted by SJSU [Payment Services](#) and consist of vice presidents' review and signature of a report identifying all employees within their area and the level of allowance.

At the discretion and approval of the division vice president, equipment and accessories may be purchased by the employee and will be reimbursed via an [Employee/Student Reimbursement](#) request.

### Taxable Income

It is important to note that the wireless device allowance is reported as taxable income. The allowance check will not reflect withholdings; however, the additional earnings will be subject to withholdings in a future payroll check. In addition, the allowance earnings will be reflected on the employee's annual W-2.

### Allowance Distribution

The allowance will be provided to the employee in advance for a six month period. Allowance checks will be distributed in March and September. The March check covers the period: March through August. The September check covers the period: September through February. The allowance check will cover six months of allowance in advance, at the level authorized by the vice president.

**Note:** Payment delays may develop due to the delay in the department's reviewing and approval process. When the approvals have been completed, payment will be forthcoming shortly thereafter.

## **Service Provider Employee Discounts**

It is important to note that the university does not promote wireless vendors. A number of service providers currently offer discounts for SJSU employees. These discounts are available to all employees. For details, please contact [Contracts & Procurement Services](#) at 408-924-1558 or by email at [financeconnect@sjsu.edu](mailto:financeconnect@sjsu.edu).

## **University Owned Wireless Devices**

### **How it Works**

Departments requiring specific equipment or technology to perform university functions and never expect to use these devices for personal use will be provided university owned wireless devices and related service. Wireless devices include but are not limited to: cellular phones, broadband access cards, broadband PDAs, laptops equipped with broadband access, broadband equipped netbooks, and Nextel two-way radios. All devices associated with the University Owned Wireless Device option are issued to a department, not an individual. University vice presidents have the authority to set standards for what constitutes business purposes for university owned devices within their division.

### **Role of the Department Administrator**

Each department requiring university owned wireless devices must designate a Department Administrator and backup administrator to manage daily operation of the devices. The Department Administrator serves as the point of contact for Contracts & Procurement Services and Service Providers (Contracts & Procurement Services is a secondary authorized contact on all department wireless accounts). Additionally, the Department Administrator must have a university [Procurement Card \(ProCard\)](#). The Department Administrator is responsible for:

- Working with Contracts & Procurement Services to create new accounts with appropriate wireless service providers
- Maintaining departmental records of all university owned wireless devices and associated usage and expense
- Purchasing new or replacement devices and services for department
- Cancelling/deactivating wireless devices no longer in use
- Reviewing monthly wireless service charges and confirming use is for official university business purposes only
- Processing associated payments via ProCard
- Informing department employees of the University Owned Wireless Device policy and insuring employees follow appropriate procedures
- Immediately informing service providers of lost or stolen devices to prevent fraudulent use
- Ensuring departments receive appropriate discounts from wireless service providers

Department's should immediately notify Contracts & Procurement Services in the event the designation of a Department Administrator or backup administrator changes.

## **Acquisition of Service and Wireless Devices**

### **Establishing New Department Billing Accounts**

When the need for a new service provider billing account is identified, the Department Administrator must contact Contracts & Procurement Services. Contracts & Procurement Services will notify the appropriate service provider, as selected by the Department Administrator, to set up the billing account number and initial service. Once established, the account information will be sent from Contracts & Procurement Services to the Department Administrator via e-mail. To summarize:

1. Department Administrator contacts Contracts & Procurement Services, requesting new billing account with selected service provider.
2. Contracts & Procurement Services contacts service provider.
3. Account is created; Contracts & Procurement Services e-mails account information to Department Administrator

Service providers will send all monthly service bills and/or invoices associated with new devices and accessories directly to the department. It is the Department Administrator's responsibility to reconcile such bills and invoices and process payment via their ProCard. For detailed information, please see the [Monthly Bill Review and Payment](#) section.

Once a service provider billing account is established, Department Administrators have the ability to purchase new or replacement devices and accessories, purchase additional service for an existing wireless number, check upgrade eligibility for an existing wireless number, and purchase service for a new wireless number. Details on how to go about these tasks follow below.

### **Purchasing New or Replacement Devices and Accessories**

Department Administrators may, at their discretion, purchase new or replacement wireless devices and accessories directly from the wireless provider. Prior to purchasing replacement devices, Contracts & Procurement Services recommend contacting the wireless provider to check the upgrade eligibility. To do so, you will need the wireless number and department billing account number.

All purchases must be made with the Department Administrator's ProCard.

### **Adding a New Wireless Number**

If a department has an established billing account with a service provider, the Department Administrator can, with the appropriate vice president approval, add a new wireless number to the account. Here are the steps:

1. Complete a [University Owned Wireless Device Request](#) form and obtain appropriate vice president's approval.

2. Contact appropriate service provider to add the new wireless number and order device and accessories for new line. The new line must be added to your existing department billing account.
3. Payment for the new line and device must be made with the Department Administrator's ProCard. A copy of the approved University-Owned Wireless Device Request form must be submitted as backup documentation with the monthly ProCard statement. Contracts & Procurement Services will audit monthly ProCard statements to ensure compliance with these guidelines.

### **Upgrading/Cancelling Service on Existing Wireless Numbers**

To upgrade or cancel service for an existing wireless number, contact the appropriate service provider.

### **Monthly Bill Review and Payment**

To ensure devices are being used for official university business purposes only, monthly wireless service bills must be reviewed by the Department Administrator. After review, the Department Administrator must sign the wireless service bills each month attesting to the legitimacy of all calls on the bill.

All monthly wireless service bills are to be paid by the Department Administrator's ProCard. A complete copy of the monthly service bill(s) and necessary additional backup documentation must be submitted with the ProCard Reconciliation Statement each month in accordance with current ProCard procedures.

Department Administrators are encouraged to periodically review their department's wireless service plans to assess whether it is the most cost-effective plan available. Departments are responsible for choosing the appropriate rate plan to suit their operational needs. When possible, department should establish pooled minute rate plans. Department Administrators are responsible for ensuring their department receives appropriate discounts from wireless service providers.

Department heads should review the usage assigned university owned wireless devices annually to determine whether a device is still required for the department's operations and if the current wireless service plan is the most cost-effective plan available.

## **Occasional Use Reimbursements**

### **How it Works**

If an employee with occasional use on a personal plan incurs an additional cost (e.g., minutes above the service plan limit), and is able to substantiate the cost of the business use through appropriate invoice documentation from the service provider, then the department may submit a claim to reimburse the employee for that particular and specific use of the employee's personal equipment. Approval of the division vice president is required when the

reimbursement claim is submitted. Reimbursement requests should be made when the amount is equal to or greater than \$15.00.

Reimbursements must occur within the fiscal year for which the expense was generated.

### **Requesting Reimbursement**

When additional costs to the employee have reached \$15.00 or greater (see above), the department can request reimbursement via an Employee/Student Reimbursement in the Financial Transaction Services system. A copy of the employee's service bill, with additional expense(s) highlighted, and a completed generic invoice, signed by the employee's supervisor and appropriate vice president, must be uploaded in FTS as backup for the reimbursement. To summarize, the employee requesting reimbursement must:

1. Complete an Employee/Student Reimbursement request in the [Financial Transaction Services](#) system.
2. Upload the copy of employee's service bill with additional expense(s) highlighted and any other relevant support documentation. Should the supporting documents alone do not provide adequate information to process the request, then a [Generic Invoice](#) form is required and signed by employee's supervisor and appropriate vice president.
3. For information about the Employee/Student Reimbursement process, please see [Employee/Student Reimbursement](#) request in the Finance website.
4. Instructions on entering an Employee/Student Reimbursement request in FTS, can be found in the [Finance Tutorials](#) section.

### **Frequently Asked Questions**

**Q: What if my ProCard daily limit is not enough to cover the wireless bills?**

A: Refer to the Credit Card Controls section of the [ProCard Guide](#).

**Q: How do I know what wireless service plan to choose for my department's University-Owned Wireless Device?**

A: The rate plan you select will be based on several factor. Determining how many minutes your department may need per month per device, and whether or not additional features will be required (e.g. text messaging).

**Q: Why has the cell phone policy changed?**

A: If a wireless device is owned by the university, IRS regulations subject the university and the wireless device user to significant compliance requirements. These requirements include detailed documentation of all usage (i.e., phone calls), evidence of review to identify personal from business usage, and, a method to ensure the employee is taxed on the amount of personal use. The IRS can declare that all undocumented use is personal and must be taxed, even if the usage was mostly business related. Implementation of procedures to comply with these regulations would create a significant burden on both administration and the employee.

**Q: Can I make personal calls from a University Owned Wireless Device during “free” calling periods (i.e., evenings and weekends or mobile-to-mobile calls)?**

A: No. “Free” calling periods are actually part of the base service plan. Personal use is prohibited at all times.

**Q: How should I delineate unintentionally answered (i.e., marketing, wrong number) calls that are not university related business or personal?**

A: Indicate instances on the monthly service bill.

**Q: What if my department wants to change service providers and keep the same number(s)?**

A: Contact Contracts & Procurement Services to request Local Number Portability (LNP).

**Q: Can I get reimbursed for accessories for my personal wireless device?**

A: Yes, if approved in advance by your division vice president and submitted on a reimbursement claim.

## Forms

- [Authorization for Business Related Wireless Service](https://app.docusign.com/templates/details/ed7d3deb-49de-4f39-9a06-9295104a5035)  
<https://app.docusign.com/templates/details/ed7d3deb-49de-4f39-9a06-9295104a5035>
- [Generic Invoice](https://www.sjsu.edu/fabs/docs/generic_invoice.pdf) [https://www.sjsu.edu/fabs/docs/generic\\_invoice.pdf](https://www.sjsu.edu/fabs/docs/generic_invoice.pdf)
- [University Owned Wireless Device Request](https://app.docusign.com/templates/details/337aa716-fc55-4642-ae4d-37f51311e697)  
<https://app.docusign.com/templates/details/337aa716-fc55-4642-ae4d-37f51311e697>

## References

- [Presidential Directive 2009-06](http://www.sjsu.edu/president/directives/pd0906/) <http://www.sjsu.edu/president/directives/pd0906/>
- Broadband does not include any Wi-Fi a/b/g/n technologies.
- Business Use is defined as any use of the wireless device by a department in the course of performing specific duties of their job to conduct official business on behalf and for the benefit of San José State University. Any other use of the wireless device is considered personal use and is prohibited.
- [Contracts & Procurement Services](https://www.sjsu.edu/fabs/services/p2p/contact-us.php)  
<https://www.sjsu.edu/fabs/services/p2p/contact-us.php>
- [Employee/Student Reimbursement](https://www.sjsu.edu/fabs/how-we-can-help/policies-guides/reimbursement.php)  
<https://www.sjsu.edu/fabs/how-we-can-help/policies-guides/reimbursement.php>
- [Finance Tutorials](https://www.sjsu.edu/fabs/connect/training-and-tutorials.php) <https://www.sjsu.edu/fabs/connect/training-and-tutorials.php>

- [Payment Services](https://www.sjsu.edu/fabs/services/p2p/index.php) https://www.sjsu.edu/fabs/services/p2p/index.php
- [ProCard](https://www.sjsu.edu/fabs/services/p2p/pay/procard.php) https://www.sjsu.edu/fabs/services/p2p/pay/procard.php
- [ProCard Guide](https://www.sjsu.edu/fabs/docs/procard_guide.pdf) https://www.sjsu.edu/fabs/docs/procard\_guide.pdf

## Contact

If you have any questions, please contact Finance Connect at 408-924-1558 or by email [financeconnect@sjsu.edu](mailto:financeconnect@sjsu.edu).