

## **Mobile Communication Device Policy**

*Frequently asked questions as of September 15, 2009*

### **Why was the policy established at UTMB?**

In order to have consistent use and accounting for cellular phones, blackberries, and/or iPhones and to minimize UTMB's liability from improper use of mobile devices. The policy will also ensure compliance with IRS rules regarding personal use of employer-issued cell phones.

### **Was this policy implemented to save UTMB money?**

No. UTMB intends to reimburse employees for all approved, legitimate, and documented business expenses. It is not the intent of this policy to have UTMB employees personally pay for UTMB-business related expenses. If you believe your work situation and mobile device plan requirements will cause you to incur additional personal expenses, please consult your supervisor.

### **What should I do if I believe I will be eligible for the allowance?**

Take the time to investigate your options by looking at each carrier and the available devices and plans at <http://www.utmb.edu/isbusops/EmployeeDiscounts.aspx>. For example, if you believe you will be eligible for a voice and data plan allowance, decide what you would do with the money. In accepting the allowance, you are committing that you will have a device and plan that you will use for work purposes. Here are a few of your options: 1) Establish an entirely new plan, keep your UTMB phone number, and sign up for voice minutes and a data plan, or 2) Increase your personal plan to include more minutes and a data plan and drop your UTMB phone number.

### **Who decides if I am eligible for a cell or smart phone allowance?**

Your department head or their designee will decide. You must meet one of the following criteria to receive the allowance: 1) Director level or above employee, 2) Staff who work outside of their main office at least 50% of the time, or 3) Staff required to be accessible to UTMB 24/7.

### **How will things work under the new policy?**

The staff members that are authorized to receive the allowance will 1) establish a new service with a cell phone carrier necessary for work use, or 2) modify their current personal cell phone plan to have services necessary to support work use. The allowance will be an automatic addition to their pay each month (for those paid bi-weekly, this is the same check as the one where insurance is taken out which is the first check of the month). Staff members will use their allowance to pay for the cost of their plan each month.

### **How soon will I be required to transition?**

This will be up to your department. Institutional leadership has asked that we all be converted by August 31, 2010.

### **Will I be able to keep my UTMB cell phone number?**

Yes. IS Cellular Pager has a process to transfer UTMB's ownership of a cell phone number to you should you wish to keep the number. If you are in a department that manages its own cell phone plans, your department will be able to transfer ownership of your UTMB number to you.

**Do I have to keep the UTMB cell phone number I have today active?**

No. You can drop the UTMB number and use your personal number for work if you wish.

**Will UTMB require me to select a specific cell phone carrier?**

No. You choose what plan and carrier you would prefer. Staff should, however, be aware of which carriers have strong signal coverage in areas they normally work and make their selections accordingly.

**Will UTMB or my department require me to select a specific device?**

In general, the answer to this question is no. However, if a mobile device application is required for your job or role and this application only runs on a specific platform, e.g. Blackberry, you can be required to use a specific type of device. One other consideration with regard to device selection is that IS Cellular Pager has standardized on either Blackberries or the iPhone. If you choose an entirely different device, keep in mind that IS support staff may have limited experience with that particular device and you may be left to work out support issues on your own with your carrier.

**Will staff be required to merge their personal and business phones?**

No. The allowance has nothing to do with the employee's personal phone or phone numbers. The allowance is the employee's, and they can choose the approach that best fits their needs as long as they have a device and plan that is necessary to support their work use. You can merge your personal and business phones if you prefer but you are not required to do so.

**How will the initial device allowance be handled?**

This will be up to your department. In Information Services, they provided the device allowance 24 months from the time you were initially issued your device (this used the logic that UTMB already paid for a device once and should not pay again until the two years are complete). IS Cellular Pager has the date each device was issued. In most cases, staff can use their current UTMB-issued device and activate it on their new personal plan. In a situation for example, where the UTMB-issued device only works with AT&T and you will be establishing or upgrading a Sprint plan, you will need to be authorized for the device allowance. In general, since most departments did not budget this year for device allowances for everyone, it is preferred where possible that you activate the device you have been issued.

**How often will I receive an allowance to upgrade my device?**

The policy allows for a device upgrade allowance every 24 months. The employee must request this allowance and a department must approve it.

**What happens if an employee leaves UTMB or loses their job but is still in a personal contract?**

Cellular service providers will require continuing service through the term of the contract but all allow the employee to reduce the amount of the contract down to a very minimal level. It is thought that most employees would continue some level of cellular phone usage.

**If I receive the allowance, will I have to provide plan statements or business use documentation?**

No, the allowance will be included in your paycheck once a month. Since the allowance is a benefit, it will be subject to payroll taxes so the net benefit to the employee will be the amount of the allowance less income tax.

**But I read the policy and it says that plan statements may be requested. Are you sure they won't be?**

It is true that the new policy does state that plan statements may be requested. This would only be done in situations where there is a concern the employee no longer has an active plan but is still receiving an allowance. If the employee is asked to prove they have an active plan but the employee elects not to provide the statement requested, the allowance would likely be terminated.

**What if I'm not eligible for the allowance but I have incurred legitimate business-related expenses on my personal cell or smart phone?**

This decision is ultimately up to your department. If your department will allow you to be reimbursed for these expenses, then detailed documentation (time, duration, actual expense amount, business purpose) must be provided. UTMB policy allows for reimbursement only for actual incremental expenses incurred by the employee. If you used a few minutes of your 500 total monthly plan minutes for UTMB and you did not get charged any more than you normally would have by the carrier, you would not receive a reimbursement.

**What if a situation like Hurricane Ike occurs and I am asked to work off site using my cell phone for an extended period thus incurring substantial expense beyond my allowance?**

The policy does provide for additional reimbursement should a major event occur. Again this decision is up to your department. All expenses would have to be clearly documented (time, duration, actual expense amount, business purpose) in order to receive reimbursement. Reimbursement would be for actual incurred expense above the allowance you had already received in your paycheck. Copies of personal cell plan statements would have to be provided for reimbursements above the allowance amount.

**What if my department rotates a cell phone or blackberry for after-hours coverage or use during the work day?**

The IS Cellular Pager office will still have the ability to establish cell or smart phones plans that are shared and completely funded by UTMB. Devices assigned for one individual's exclusive use will no longer be allowed to be funded by UTMB.

**Will this new policy impact data cards?**

No the new policy only addresses cell or smart phones. Employees are encouraged to investigate a tethering option, i.e. the ability to use your smart phone like a data card, when signing up for their new

plans. Many carriers charge only \$8 per month extra for this service versus \$45 to \$50 per month for a data card. Data cards will still be available through IS Cellular Pager on the 1<sup>st</sup> floor of the Administration Building.

**Will this policy impact pagers?**

No, pagers are not affected by this policy. Pagers will continue to be provisioned by the IS Cellular Pager office on the 1<sup>st</sup> Floor of the Administration Building.

**Can I use the phone UTMB has already provided me with my new contract?**

Yes, but this phone is still the property of UTMB and must be returned to UTMB when use is completed. You would be eligible for a replacement device allowance 24 months from the time you received the UTMB device. In some cases, it may be financially attractive to receive a new device when you activate a new plan.

**Will Information Services be charging anything additional to activate cell or smart phones on the UTMB mail systems?**

Yes. There will still be a \$10 per month charge to the sponsoring department for Blackberries that are active on the UTMB Blackberry Enterprise Server (BES) that connects with the UTMB mail system. These fees cover software license charges, maintenance, and personnel support required to keep these systems running. There will be a \$35 one-time charge if the device is an ActiveSync device. This activation charge covers the personnel costs of activating the device. The aforementioned charges are the same charges that exist today when a department sponsors a personal Blackberry or ActiveSync device usage.

**What is meant by the term ‘an ActiveSync device’?**

An ActiveSync device is virtually any smart phone that is not a Blackberry. For example, the Samsung Blackjack, T-Mobile Dash 3G, and iPhone are all examples of ActiveSync devices.

**Will a new IRAM request have to be done to activate my device after I’ve transitioned it to my own plan?**

A new IRAM request will be required only if you switch phone types, i.e. you used to have a Blackberry and you are transitioning to an iPhone. This helps make sure the department is charged for the appropriate service. If you activate your existing Blackberry on your new plan, then no IRAM would be required to allow your phone to work with UTMB’s e-mail system.

**Will cell phone carriers require me to provide my social security number when establishing a new contract?**

Yes, all carriers will do this because they will run a credit check. The carrier’s rationale is that they are extending you credit for your expenses until they are paid each month. Many carriers have the option for employees to make a deposit in place of the credit check. Check with your carrier if you elect the deposit option as it could be as high as \$500.