



Office of the President

One Washington Square
San José, California 95192-0002

PD 2009-06

October 8, 2009

MEMO TO: Administrative Heads, Chairs, Deans, Directors and
Vice Presidents

FROM: Jon Whitmore
President

A handwritten signature in black ink that reads "Jon Whitmore" with a long horizontal flourish extending to the right.

SUBJECT: Presidential Directive 2009-06

SJSU Process and Procedures for Wireless Devices

Introduction

Employees of the university who are required to carry a personal wireless device* as part of their job responsibilities may be provided an expense allowance by the university towards the cost of services for the device. This policy establishes the levels and processes for providing an expense allowance to employees who are determined to qualify for such an allowance from the university.

In establishing this policy, the university is ending the practice of providing cell phone and other mobile communication devices through service contracts billed directly to the university. Instead, qualifying employees who are approved by their respective vice president to receive an expense allowance for business purposes are to establish a personal contract with a service provider. Employees receiving an expense allowance must provide the telephone number to the university in order to be accessible to the university when needed. Implementation details and guidelines will be distributed by the Division of Administration and Finance.

Applicability

Occasional Use. The policy for receipt of an expense allowance does not apply to employees who may occasionally use personal wireless devices for work purposes. However, 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.

Voice or Data Service Only. Employees who are determined to require EITHER voice (e.g., cell phone) or data (e.g., wireless card) service, but not both, as part of their assigned responsibilities will receive a monthly expense allowance of \$55. The decision regarding who qualifies for this level of expense allowance is the responsibility of the employee's respective division vice president.

Voice and Data Service. Employees who are determined to require BOTH voice and data service will receive a monthly expense allowance of \$100. Typically, these are employees who are required by the university to carry a device so as to be accessible while away from the office, including those who are required to be accessible at all times, i.e., 24/7, or a significant amount of time outside regular work hours. The decision regarding who qualifies for this level of expense allowance is the responsibility of the employee's respective division vice president.

Implementation

When an allowance is first established, the employee's vice president will complete a mandatory authorization form available from the Division of Administration and Finance that provides specific information describing that employee's required usage for business purposes, the level of allowance that is approved, and for the \$55 level, the type of service that is authorized. In February and August, each vice president will submit a list of employees who are approved for an expense allowance. Employees will be reimbursed the following month, with each expense allowance paid in advance to cover the following six-month period. Allowances for employees receiving authorization for a device for a portion of the six-month period will be pro-rated to the end of the current six-month period. The cost will be charged to each division/department, and the employee allowance will be paid via check processed by Accounts Payable.

Employees who end employment with the university during the period for which an expense allowance has already been paid are not required to reimburse the university for the remaining share of the paid allowance. They may retain their personal service plan or cancel at their discretion. If the employee's departure from the university is due to the university's action (i.e., termination or layoff) and the employee chooses to cancel their service plan, the university will reimburse any cancellation fee charged by the service provider, provided invoice documentation is submitted.

NOTE: According to IRS regulations this allowance is reported as taxable income. Accounts Payable will provide the appropriate information to HR/Payroll for inclusion in the employees' W-2 forms.

Technical Support

Support for email access by devices identified in this policy will be provided by the Division of the CIO. Support will also include troubleshooting a device in the event there appears to be compatibility or access issues (e.g., email conflicting with another application). Using guidance from university technical support staff, ensuring compatibility of the selected device and service with university systems is the employee's responsibility.

As has been the case in the past, employees with personal devices not covered by an expense allowance may retain remote access to university computing services and receive support from the Division of the CIO as needed.

Purchase or Replacement of Device

The purchase or replacement of a device is at the discretion and approval of the division vice president. With vice president approval, the employee shall purchase the device personally and the university will reimburse via direct pay. If a device that has access to university systems is lost or stolen, the individual must contact the Division of the CIO immediately to monitor email and to make certain the device is decoupled from university systems.

*Devices: This may include at least the following:

- Cell phones
- PDA's (Blackberries, etc.)
- Smart phones (iPhone, Pre, etc.)
- Wireless cards (EDVO card, etc.)

Note: Eligibility for an expense allowance is limited to one device per employee.