

Frequently Asked Questions

1. Who is eligible for a telecommunications allowance?

An employee whose job requires immediate accessibility to receive and/or make frequent business calls for at least one of the following requirements may be eligible for a cell phone allowance based on departmental approval and available budget:

- **On-call availability:** Employee is required to be on call a majority of the time to be contacted in the event of an emergency or service need. Departments should consider consolidating to one university-owned on-call phone, when appropriate, with which employees take turns on call.
- **Frequent mobility:** The job requires considerable time outside the office during working hours and it is imperative to the functioning of the university that the employee be immediately accessible to receive and/or make frequent business calls during those times.
- **After-hours availability:** The job requires the employee to be immediately accessible to receive and/or make frequent business calls outside of working hours. Employee must be readily accessible due to the specific nature of their duties and must be available for emergency responses or time-sensitive consultation after normal office hours.

2. Does this change include PDA phone service?

Yes. If the PDA phone is required to perform your job, your department budget manager and vice president/provost may approve a PDA phone data plan allowance on top of the voice allowance. Eligibility requirements for a PDA phone data allowance include the following criteria:

- Real-time decision making and university responsiveness of an urgent nature that must be accomplished through email.
- Real-time communications/responses by email are required when traveling, off campus, away from the office, or after hours.

3. What options do approved allowance recipients have for establishing a personal account?

- a. Use existing personal phone
- b. Activate new personal phone line

4. Can I use a cell phone for personal calls when I purchase it with a non-taxable allowance from the university?

Yes. Because you own the phone, you can use the phone for personal calls and you do not have to document usage. However, the amount of your cell phone allowance will be calculated based on the number of minutes you need for

university business use. You will no longer need to maintain a separate phone for personal use.

5. Is the allowance that I receive for my cell phone taxable?

No. The allowance is a non-taxable reimbursement for the business use of your phone.

6. What if my actual business usage exceeds the amount of the monthly allowance I receive?

You may request an increase in your monthly allowance based on the expected ongoing increase in your business usage. If your business use temporarily spikes for only one or two months, you may request an expense reimbursement for your unreimbursed business calls. You will need to provide your department with a complete log of each business call, a copy of your cell phone statement with each call highlighted, and an expense reimbursement form.

7. Can I get an allowance to cover the cost of a cell phone device?

Allowance recipients may be eligible, based on departmental approval, for a one-time allowance to cover up to the established equipment allowance amount. This allowance is available no more than once every two years. An original receipt/invoice indicating the amount paid and that the phone was purchased for the employee's line must be provided. Different allowance amounts are available for voice-only allowance recipients and PDA phone allowance recipients. The One-time Cell Phone Reimbursement Request Form is available at this site: <http://www.apu.edu/imt/telecommunications/cellphones/forms/>. Phones must not be purchased with university-issued credit cards.

8. When are employees eligible for an equipment allowance?

Employees can request an equipment allowance once every two years. For employees with university-owned equipment purchased within the last 2 years, it is recommended to wait until the current contract end date to approve an equipment allowance, since new equipment was already purchased for these lines. Departments can allow these employees to continue using their current equipment.

9. What if my cell phone is lost, stolen, or damaged?

The employee is responsible for all equipment charges in addition to the equipment allowance provided once every two years.

10. Does everyone get an allowance for a personally owned phone?

No. Only those who meet the criteria, have budget manager and vice president or provost approval, and have a business need will receive an allowance. You should receive an allowance only if your job requires that you carry a cell phone where other less-expensive means of communication are not adequate, and then only an amount necessary to cover your business calls.

11. When I sign up for a plan, can I purchase additional minutes for personal use?

Your allowance will be based on the number of plan minutes you need for business purposes. If you would like additional minutes for personal usage, you may increase your plan and pay for any additional costs personally.

12. If I qualify for an allowance, can I add a phone to an existing family share plan if it is cheaper than getting a separate plan?

Yes. As long as the number of minutes available for your business use meets the minimum requirement of your specified allowance, you will be eligible for the allowance.

13. What if my choice doesn't work out for me?

You should take full advantage of any trial periods offered by carriers. Pay strict attention to your level of service during that period, and return the phone and cancel the plan if you are not receiving the level of service you need.

14. What if I need a PDA phone for business use?

If your job requires that you have access to email, calendaring, or other PDA functions, your department may approve a monthly data plan allowance and equipment allowance to purchase a PDA phone. BlackBerries are NOT eligible to receive a monthly data plan allowance or a PDA phone equipment allowance. If you want a PDA phone but your job doesn't require it, you can select a PDA phone but must personally pay for the additional plan amount. You will also only be eligible for a voice-only equipment reimbursement allowance.

15. Can I use a BlackBerry?

BlackBerry devices may be used by employees but they do NOT qualify to receive a data plan monthly allowance or a PDA phone equipment allowance. These devices do not connect to university calendars or contacts.

16. Will the university pay for any accessories for my cell phone?

No. Employees are responsible for covering the cost of any accessories.

17. What happens after I receive departmental approval for an allowance?

You must obtain a cell phone and plan that meets the minimum requirements of the selected allowance. Turn in a copy of your most recent cellular billing statement to your budget manager. The request form and billing statement copy will be turned into Human Resources and forwarded to Payroll. The allowance will be added to your paycheck on your next regular payday as long as it is received by Payroll by the 5th of the month.

18. How long will I receive the allowance?

You will continue to receive the allowance on your paycheck until the end of the current fiscal year or until your allowance is cancelled for any other reason. Your allowance amount may be changed or canceled by your department at any time.

19. When do I need to notify my budget manager of any changes?

Notify your budget manager within 5 working days if the eligibility criteria are no longer met, if your service is canceled, or when your phone number, carrier, or plan eligibility changes.

20. What if I leave the university before my cell phone contract expires? Will I be reimbursed for any early termination fees?

If you incur any cancellation fees or penalties (unrelated to employee misconduct) as a result of changing positions, terminating employment with the university, or the university determining a phone is no longer required for the position, your department will provide you with a one-time allowance to reimburse you for this charge. A copy of the billing statement indicating the amount of the early termination charge billed is required. The fee must be incurred within 30 days of the university decision that led to the allowance cancellation. The One-time Cell Phone Reimbursement Request Form is available at this site:

<http://www.apu.edu/imt/telecommunications/cellphones/forms/>.

21. Are there any exceptions to receiving a university-owned phone?

At the discretion of your department, vice president/provost, and the CIO, certain employees or groups of employees may continue to receive a university-provided cell phone where a shared department phone or an on-call department phone is required for business use only. In cases where an exception is approved, employees are required to document the business use of the phone and reimburse the university in a timely fashion for any personal calls made using the device.

22. For approved departmental phones, how am I supposed to figure the reimbursement amount for my personal calls?

You must reimburse your department at the established university per-minute rate for cell phone usage. All other usage should be reimbursed at the actual cost.

23. If I don't receive an allowance but I use my personal cell phone for university business, can I get reimbursed for those calls?

You may be reimbursed for your business calls at the university-established per-minute rate with prior departmental approval. You will need to provide your department with a copy of your cell phone statement noting the business calls and the business purpose for each call.

24. As a budget manager, how do I know which is the correct allowance amount for an employee?

The allowance amount must be based on the number of plan minutes needed by the employee for business purposes. The allowances are based on standard plans offered by cell phone providers. In selecting the plan, departments should consider business usage only and not factor in personal usage. Previous call usage details are available from Telecommunications if necessary.

25. What are the advantages of staying with a university-recommended provider?

The university has arranged for employee discounts with four major carriers.

26. How do I know I'm getting a fair allowance?

With department approval, you will work with your budget manager to determine how much your allowance will be. You will receive an amount necessary to pay for required business use.

27. How do I know what cellular telephone or monthly plan to choose?

The device and plan you select should be based on several factors. The phone and plan you select must at a minimum meet the requirements of the selected allowance. You should consider both business and personal service coverage. You should consider your calling patterns. We recommend that you shop around, check vendor websites, or speak with the different vendor reps before making a decision. Price should be only one factor in your choice. The lowest-priced carrier may not meet your coverage and other needs.

28. If I am authorized to use a PDA phone to access university email, calendar, or other services, can the university recommend which devices will work best and will be supported by the university?

These products change regularly—so you should speak with the wireless vendor. Phones with the following operating systems can connect to APU's system to sync email, calendar, and contacts. Employees qualifying for the data plan allowance must obtain a phone with one of these operating systems in order to be eligible:

- Windows Mobile
- iPhone
- webOS (Palm)
- Android (currently only email support via IMAP)

Other operating systems, such as BlackBerry, connect with APU email only, and do not qualify for a data allowance.

29. How do I apply for the monthly cell phone allowance?

A Cell Phone Allowance Request Form, available at <http://www.apu.edu/imt/telecommunications/cellphones/forms/>, must be completed and approved by the department budget manager and vice president or provost. Forms are sent to Human Resources and must be renewed each fiscal year.

30. How is the dollar amount of the telecommunications allowance determined?

The department budget manager determines the allowance amount based on the business needs of the employee and within the selection criteria provided by IMT. The university sets the allowance amounts based on current plan options available and university discounts.

31. What does the allowance cover?

The allowance is intended to reimburse the employee for the business use of their own personal cell phone, not to pay the entire phone bill.

32. How will cell phone allowances be paid to employees?

The allowance will be paid once a month in the employee's paycheck.

33. Can I use a university credit card, expense reimbursement, or a purchase requisition to pay for cell phone service?

No. These services are no longer paid directly by the university and must go through the allowance process.

34. Can I be reimbursed for necessary business calls made with my personal cell phone if I am not eligible for a cell phone allowance?

Yes. With department approval, a request for reimbursement may be submitted with appropriate substantiation via the expense reimbursement process.

35. Can I use any cell phone or plan if I receive a voice-only allowance?

Yes. The device and plan you select are your responsibility, but must at a minimum meet the selected allowance requirements.

36. Can I use any cell phone or plan if I receive a data allowance?

Not all PDA phones are eligible for a monthly data allowance or the one-time PDA phone equipment allowance. To qualify, the user must select a PDA phone and data plan that allows the user to connect to APU email, calendar, and contacts. Reference No. 46 below for qualifying PDA phones.

37. What if I have trouble with my service or phone on my personal account?

You will need to work directly with the carrier for resolution, because this is your personal plan and equipment.

38. What support does the university provide for accessing email, calendar, or other services using a PDA phone?

IMT will provide documentation for connecting to university email, calendar, and contacts.

39. Where can I find IRS information on employee use of business cell phones?

The IRS website includes additional information on employer-provided cell phones. You can find this information at

<http://www.irs.gov/govt/fslg/article/0,,id=167154,00.html>.

40. What if I need an additional feature for my cell service that is required for business usage but isn't on the approved allowance list?

Knowing that all situations cannot be foreseen or included in the calculations, the policy allows vice presidents/provosts to approve different allowance amounts. If an additional feature or service, within policy, is required for business usage, the allowance amount can be adjusted accordingly.

41. What if the allowance amount corresponding with my plan is more than I pay for my actual cell phone plan?

Allowance amounts are based on standard carrier plans. Allowances should cover business usage only. The University will only reimburse up to the amount of your bill.

42. What if my credit isn't good and I can't get a cell phone account?

The department may want to consider a departmental phone for those who don't qualify for a cell plan, if appropriate.

43. What happens with the university cell phones and accessories?

IMT will collect cell phones and accessories to be recycled. For most phones, there is minimal to no compensation for recycling. If a department is interested in receiving credits from the recycling of newer, higher-end phones, please notify IMT prior to submitting the equipment.

44. Will my prepaid cell phone qualify for an allowance?

No. At this time the university does not offer allowances for prepaid plans.