



Mobile Device Use for Business Purposes Policy

PURPOSE:

To establish guidelines and procedures for the distribution of CSUSM Corporation (Corporation) owned mobile devices and reimbursement of business-related use of employee-owned mobile devices. Mobile device stipends shall be reserved for only those employees who meet the stated criteria and have a legitimate business need. Simple convenience is not a criterion for a mobile device stipend.

SCOPE:

This process applies to employees who carry a mobile device so as to be available to Corporation and/or the University (Corporation) while away from the office/campus and/or to use a mobile device as an integral tool in performing their assigned duties. The decision of whether an employee needs to be available to Corporation while away from the office/campus and use a mobile device is determined by the employee's supervisor/MPP and must be approved by the employee's MPP and Corporation Executive Director (ED) or their designee.

Eligibility Criteria

Positions eligible for mobile device stipends are determined by the following criteria:

- **The job function of the employee requires considerable time outside of their assigned office or work area and it is important to the Corporation that they are accessible during those times.**
- **The job function of the employee requires them to be accessible outside of scheduled or normal work hours.**
- **Position description should expressly state job responsibilities which would justify the employee's eligibility for a mobile device stipend.**

Approval

Employees whose positions meet the established criteria and who wish to request a monthly mobile device stipend should complete the Corporation Mobile Device Stipend Authorization Form.

POLICY:

I. Terms and Definitions

Mobile Device – A mobile device is a handheld tablet, phone or other device that is made for portability, and is therefore both compact and lightweight. Mobile devices are also known as handheld computers.

Passcode – A passcode is a four-to-six-digit numerical code that is built into the device's operating system, though increasingly, more complicated passcodes are becoming available to users as an option. This code will "unlock" the device and give the user access to all of its contents.

Employee – includes Corporation positions and State reimbursed positions assigned to work for Corporation.

II. Guidelines

A. Mobile Device Options

For those employees who have been assigned to carry a mobile device, Corporation offers a reimbursement plan and Corporation owned device plan. The decision regarding which plan to use will be determined collaboratively between the employee and their supervisor and fiscal authority. However, if an agreement cannot be reached, the default option will be Corporation owned device plan, which shall be issued on an as needed basis, and prohibits personal use.

B. Criteria for Reimbursement Plan or Corporation Owned Device Plan

The employee's supervisor and fiscal authority will use the following criteria in evaluating the business-related reason for providing a reimbursement or issuance of Corporation owned mobile device for employees whose positions entail the following responsibilities:

- Employee availability: frequent or limited.
- Travel – Employees who travel or are out of the office and need to be in contact with students, faculty, managers, or other University administrators on a frequent or limited basis.
- Work Location – Employees who may work in the field or at job sites where access to communication devices is not readily available.
- Emergency Response – Employees who may need to be contacted and/or respond in the event of an emergency or are required to be available during non-business hours.
- Programmatic needs identified by ED or designee.

Reimbursements are not a means of providing additional compensation to employee and must follow the guidelines above.

III. Reimbursement Plan

Corporation will provide an expense reimbursement for/toward service plan. The maximum monthly amount of the reimbursement is determined by Corporation's ED and Associate Executive Director, Human Resources & Payroll (AED HRP) based on the expected campus-required usage to meet the business need. In addition, the ED and AED HRP may also consider past, comparable, and expected usage for the employee's position.

CSUSM Corp reimbursement is used to defray the cost of the use of the mobile device for CSUSM Corp business. The actual reimbursement will not be more than the monthly cost of the employee's service plan. If the monthly service plan drops below the reimbursement amount, the employee must contact their supervisor and adjust the reimbursement amount.

Since the mobile device contract is personally owned by the employee, it can be used for both personal and business calls. An employee with a mobile device reimbursement must maintain an active mobile device contract for the life of the reimbursement. Using a device in ways inconsistent with CSU, CSUSM and Corporation policies, local laws, state laws or federal laws will result in immediate cancellation of the communications device reimbursement.

As long as the service provider's plan and device are compatible with the business need required by Corporation, the employee may choose the device and the service plan they wish to use. Corporation will not pay for the communication device. The arrangement is between the employee and the service provider; Corporation is not involved in the contract between the provider and the employee.

The employee must notify the supervisor immediately if the employee discontinues their communications device plan while receiving the reimbursement.

Payment for purchase of the equipment, insurance, accessories, monthly service fees, or any related expenses shall be the responsibility of the employee. Equipment malfunction, resolution of billing disputes, loss of device or related problems shall also be the responsibility of the employee.

Employee is responsible for submitting the required forms and supporting documentation in a timely fashion in order to receive the monthly reimbursement. In addition, the employee must also keep electronic or paper copies of forms and supporting documentation for audit purposes.

A. Reimbursement Plan Tier I: Personally Owned Device with Limited On-Call and occasional use

Mobile devices under this option are the personal property of the employee. Tier I applies to employees who will be using their device occasionally for work-related purposes. The use of the mobile device is no different than the occasional use of other personal equipment.

Business expenses associated with the personally owned device are considered infrequent and will be reimbursed at a rate of \$25 per month.

B. Reimbursement Plan Tier II: Personally Owned Device with Frequent On-Call and full use

Mobile devices under this option are the personal property of the employee. Tier II applies to employees who will be using their device frequently for work-related purposes. The use of the mobile device is no different than the frequent use of other personal equipment.

Business expenses associated with the personally owned device are considered frequent and will be reimbursed at a rate of \$50 per month.

IV. Corporation Owned Device Plan

Corporation will retain ownership of the mobile device and it will be made available to employees as needed. Corporation will also determine which providers and devices are deemed acceptable for use.

Corporation owned devices should not be used for personal reasons, as this may result in reimbursement to Corporation for personal use (amount that represents personal use as well as a pro rata share of the monthly service charges) and reporting of use amounts as taxable income.

Corporation reserves the right to cancel the device if it is deemed to be overused for personal use. There is no reimbursement given to employees who choose this option.

The employee and supervisor will need to document the issuance of the asset, whether purchased by Corporation or donated to Corporation. Corporation must authorize all replacements, repairs, etc. for the device.

Corporation owned mobile devices must be returned to employee's supervisor once they are no longer needed or upon termination of employment.

The employee will follow the CSUSM Information Security Officer recommendations to ensure all personal identifiable information has been removed from the device prior to any reissuance or decommissioning of the device.

V. Responsibilities

A. Employee Responsibilities

- For reimbursement plan and Corporation owned device plan, employees must complete the Corporation Mobile Device Stipend Authorization Form and forward to their supervisor and fiscal authority for approval. Once approved, the employee must submit to Corporation Human Resources for review.
- The employee shall provide their contact number to their supervisor and additional staff as requested. The employee shall promptly notify their supervisor if the number changes.
- The employee is expected to avoid using their device under any circumstances where such use might create or appear to create a hazard. Usage of a communications device in a motor vehicle must be in compliance with current state and federal laws.
- The employee shall make available to Corporation, upon Corporation request, records of the business calls necessary to comply with applicable law and regulations, including but not limited to, the California Public Records Act. The employee may redact any personal information from the records provided. The employee agrees to retain mobile device bills for thirty (30) days from the date of reimbursement submission.
- Every user of mobile devices must use reasonable care to protect Corporation and University confidential data. CSUSM requires all mobile devices that connect to the campus email server to require a passcode. CSU Responsible Use Policy and CSUSM Acceptable Use Policy affects all faculty and staff that use any mobile devices to read campus email through their devices' mail application.
- Employees are expected to secure their mobile device and should report any loss or theft of the device immediately to the CSUSM University Police and supervisor. In such situations, employees must also contact their supervisor and CSUSM Information Security Officer to determine if any personal identifiable information may have been exposed.

B. Supervisor and/or Fiscal Authority Responsibilities

- Monthly obtain and review documentation from employees that the reimbursement amount does not exceed the service plan amount.
- Notify AED HRP when an employee is separated or no longer is required to carry a mobile device and/or receive a reimbursement for business purposes.

C. Executive Director and/or Designee Responsibilities

- Work with the AED HRP to determine the appropriate reimbursement amount necessary for each tier level and for the employee to perform the expected business tasks.
- For Corporation owned device ONLY: Order device through CSUSM IITS/Telephone Services and pay monthly invoice for device and keep electronic copies of invoices. Keep log of devices and users (checking in and out) as needed. Retain copies of all documents as these are subject to audits.