

PPM 294: Cell Phones and Other Portable Electronic Devices

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Appendix I, Employee Eligibility Form for University-Provided Portable Electronic Device/Service Form

Appendix II, UC ANR Employee Agreement Form for University-Provided Electronic Device/Service Form

Appendix III, UC ANR Portable Electronic Device Best Practices Supplement

Note: For links to referenced documents see Section VI, *Related Information*, below.

I. POLICY SUMMARY

- A. This section of the Policy and Procedure Manual (PPM) for the University of California (UC) Agriculture and Natural Resources (ANR) describes UC ANR's local implementing procedures for UC's Business and Finance Bulletin BUS G-46, *Guidelines for the Purchase and Use of Cellular Phones and Other Portable Electronic Resources* and related Internal Revenue Service regulations.
- B. It is the policy of UC ANR to conform to Internal Revenue Service regulations governing employer-provided cellular devices, tablets, peripheral equipment, and related services for use by employees.
- C. In support of UC ANR's public service mission, immediate access to information, email and clientele contact is essential. When there is a significant business reason for such access, UC ANR may provide employees with electronic communication resources for conducting University business in the community or outside one's normal workplace.
- D. Electronic resources can be approved for employee use by the Unit Director only when the primary use of the device is for substantiated business and its use represents a reasonable use of public funds. Personal use of the University-provided electronic device is limited to incidental use.

II. DEFINITIONS

- A. **Cellular (Cell) Phone:** A mobile phone that could include features such as a keyboard or basic applications. It does not include internet connection capabilities, email access, or other "smart" features.
- B. **Smartphone:** A mobile phone that does include features such as internet connection, Wi-Fi, e-mail access, applications and a web browser.
- C. **Tablet:** A mobile device usually consisting of a large (6"+) touch screen, with internet connectivity and other smart features. It may include applications capable of making calls or writing text messages, and does not include telephone services. Tablets referenced in this policy do not include tablet-like personal computers that run full versions of desktop operating systems.
- D. **Mobile Hotspot:** A device that creates a local Wi-Fi network with the carrier's wireless telephone network.
- E. **University Business:** Actions taken by an employee for the purpose of conducting official University business in accordance with that employee's assigned duties and responsibilities.
- F. **Incidental Personal Use:** Use that does not directly or indirectly interfere with the University's operation of electronic communications resources, interfere with the user's employment or other obligations to the University, or burden the University with noticeable incremental costs.
- G. **Electronic devices:** In this policy, any device such as a cellphone, smartphone,

tablet, or mobile hotspot as defined here. The term is interchangeable with “portable electronic device” or “electronic communication device”.

III. POLICY TEXT

This policy provides eligibility guidelines as to the appropriate circumstances for UC ANR purchases of electronic devices for use by employees for business-related communications that are required outside of the normal workplace.

It establishes the documentation required for use of University-provided electronic devices as well as the procedures and compliance requirements for all UC ANR employees who use electronic devices, and for those that supervise those employees.

A. Eligibility

1. While UC ANR recognizes the needs of its employees working in off-site locations where standard communication equipment may not be available, the issuance of an electronic device is a privilege accorded at the discretion of the University. This privilege is subject to normal conditions of business established by UC ANR, including procedures for initiation and termination of service eligibility.
2. UC ANR has approved an exception to this policy for all academic employees and staff Community Education Specialists due to the program delivery mission of their positions.
3. All other UC ANR employees are required to complete a UC ANR *Employee Eligibility Form for University-Provided Portable Electronic Device/Service* (see item VI, *Related Information* below for a link to the form) prior to purchasing an electronic communication device. Within this policy, this form will be referred to as the “Employee Eligibility Form.” Eligibility for such devices requires one or more of the following primary job conditions.
 - a. Travel – Employees who frequently travel or are out of the office and need to be accessible to staff, clientele, managers, or other UC ANR business associates.
 - b. Work Location – Employees who typically work in the field or at job sites in the community where access to electronic communication devices is not readily available.
 - c. Emergency Responders – Employees who need to be available and/or to respond to a crisis or emergency, or who are required to be available during non-business hours.
 - d. Other – Employees who are otherwise required by their Unit Director to be accessible via an electronic device at all times.
4. If multiple electronic communication devices are needed by the same employee, Academics, Community Education Specialists, and staff are required to complete

the Employee Eligibility Form, providing a justification as to why the additional device is required.

5. For an electronic device purchased for use by a specific location or program (e.g. conference room, helpline, service center), an employee must submit an Employee Eligibility Form for its purchase.
6. For purchases that are funded by an external grant or contract (e.g. CalFresh), the purchase must have been budgeted and/or confirmed with approval documentation from the sponsoring agency.
7. All Employee Eligibility Forms must be approved by the Unit Director, certifying that the employee frequently requires the device to perform their job function.

B. Employee Agreement for University-Provided Devices

1. UC ANR requires that all employees sign an agreement certifying that the primary use of the device will be for official University business and that any personal use of the resource will be incidental in nature.
2. It is the employee's responsibility to submit a UC ANR Employee Agreement Form for University-Provided Electronic Device/Service to the Business Operations Center prior to or upon receipt of the device. Within this policy, this form will be referred to as the "Employee Agreement Form." Otherwise, the cost of the portable electronic device could be considered a benefit to the employee and would be subject to IRS regulations and income tax reporting.
3. Incidental personal use of the device must not adversely affect the performance of an employee's official duties or the functions of his/her department. Such personal use shall not directly or indirectly interfere with UC ANR's operation of electronic communication resources, interfere with the user's employment or other obligations to UC ANR, or burden UC ANR with noticeable incremental costs.
4. Any noticeable incremental costs for personal use of a UC ANR provided electronic communications resource must be reimbursed by the employee furnished with the resource.

C. Replacement and Disposal of Devices

1. Replacement of electronic devices will normally be done at the end of life of the device, not at the end of the contract term.
2. Replacement purchases due to theft, loss, or malfunction, for which there is no viable remedy, or may be necessary to adapt to business-essential advancement in technology, may be approved.
3. Previously-deployed devices may be available from the Information Technology unit at UC ANR in Davis,
4. For replacement devices that are beyond repair, have been lost, or are otherwise unusable refer to UC's BUS-38, *Disposition of Excess Property and Transfer of University-Owned Property* for device disposal.

IV. COMPLIANCE / RESPONSIBILITIES

Function	Responsibilities
Controller	Issues the implementation procedures under this policy.
Unit Director	Approves the purchase of devices. Ensures that any purchase of electronic communication device conforms to the requirements of this policy. Monitors business-related and personal use of devices. Ensures that employees are utilizing the most appropriate plan for purchasing devices/service. Ensures that any personal use that may burden UC ANR with noticeable incremental costs are reimbursed by the employee.
Employee	Submits Employee Agreement Form to the BOC when device is acquired. Safeguards and controls the use of assigned UC ANR devices. Is required to reimburse UC ANR for any personal use of a device that results in noticeable incremental costs to the unit. Periodically reviews the calling plan to ensure it is appropriate for his/her business use. Avoids using a cellular phone or other devices where such use might create or appear to create a hazard, including use while driving (emergency responders excluded or during general emergencies). Reports the loss or theft to their unit and to service carrier, if applicable. Returns assigned device to UC ANR upon separation from UC ANR employment. Demonstrates stewardship of UC ANR resources and strategic sourcing when purchasing any electronic device.
Account Manager	Reviews and monitors purchases to ensure transactions are appropriate and funding is appropriate and available.
Business Operations Center	Reviews and monitors transactions to ensure eligibility, fund availability, and fund appropriateness. Process orders for electronic devices. Maintains UC ANR Employee Agreement Forms.
Contracts & Grants	For purchases made with extramural funds, ensures budget and/or sponsor approval.
Information Technology	Serves as a resource for employees inquiring about tablet purchases.

V. PROCEDURES

Reference Appendix III, the UC ANR *Portable Electronic Device Best Practices Supplement* supplemental guidelines to determine which devices are appropriate and available with discounted pricing to UC employees (UC contract pricing, service rate plans, and AggieBuy). (See below item VI, Related Information for a link to Appendix III.)

VI. RELATED INFORMATION

- [UC Office of the President \(UCOP\) Business and Finance Bulletin G-46: Guidelines for the Purchase and Use of Cellular Phones and Other Portable](#)

Electronic Resources

- [UCOP Business and Finance Bulletin BUS-38: Disposition of Excess Property and Transfer of University-Owned Property](#)
- [Appendix I: UC ANR Employee Eligibility Form for University-Provided Portable Electronic Device/Service \(Employee Eligibility Form\)](#)
- [Appendix II: UC ANR Employee Agreement Form for University-Provided Electronic Device/Service \(Employee Agreement Form\)](#)
- [Appendix III: UC ANR Portable Electronic Device Best Practices Supplement](#)

VII. FREQUENTLY ASKED QUESTIONS

Not used.

VIII. REVISION HISTORY

December 2020:

Format updated, gender-neutral language employed.

March 2023:

Format updated.