

**POLICY:** Cell Phone Reimbursement Policy

**Date Issued:** 12/1/2015

**APPLIES TO:** All Finance and Administration Staff

**ISSUED BY:** Finance and Administration – Office of Vice President for Operations/Chief Financial Officer

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**I. Overview**

The University recognizes that staff in Finance and Administration (F&A) may be required to use a cell phone for business purposes. Cell phone usage includes calls, texts, and data. This policy outlines requirements for reimbursement of the business usage portion of cell phones for all F&A staff. The goal of the policy is to reimburse employees fairly when personal cell phones are used for business purposes. The University also seeks to improve stewardship of its resources by minimizing instances where F&A staff members are being subsidized for cell phones when usage is personal rather than business. Understanding that there will be unique circumstances, all exceptions to this policy must be approved by the F&A Division Controller.

**II. Eligibility**

F&A staff may be eligible for cell phone reimbursement when (a) job requirements justify a cell phone, (b) if business usage is at least 25% of total cell phone usage, and (c) their supervisor has approved reimbursement of cell phone costs. No reimbursement will be made for de minimis usage.

Job requirements that justify reimbursement of a cell phone include:

- Substantial amount of time spent away from the main office during normal business hours
- Accessibility for urgent business related communications with the individual during or after normal business hours
- A requirement to travel frequently on University business

Note: Employees with current cell phones, whether University or personally purchased, that do not have a business need for the cell phones (as defined above) will no longer be provided a phone or be reimbursed.

**III. Reimbursement Approach and Levels**

For the vast majority of F&A employees that require a cell phone for business purposes, the employee must purchase the phone. The University will reimburse the estimated portion of business use through a monthly stipend (shown below) through payroll. This stipend must be validated on an annual basis and shall never exceed the total monthly bill. With the exception of a small number of individuals in Public Safety & Security, Information Technology and Facilities Services that are nearly 100% in the field, the University will no longer purchase cell phones on behalf of F&A (refer to Section V).

Eligible employees, with approval from their unit, will receive the following stipend based on estimated percentage of business use:

| <b>Eligibility Level</b> | <b>% Business Use</b> | <b>Monthly Stipend</b> |
|--------------------------|-----------------------|------------------------|
| 1                        | 25% or more           | \$25                   |
| 2                        | 50% or more           | \$50                   |
| 3                        | 75% or more           | \$75                   |

A. Employee Responsibilities

1. On an annual basis, the employee must validate business usage of cell phone with their supervisory unit
2. Employees receiving a stipend are not eligible for hardware, software or accessory purchase reimbursement
3. Since these cell phones are the personal property of employees, the employee is responsible for any loss, theft, or damage
4. Employees will not receive technical support from the University for their cellular phone
5. Employees must have their phones meet University security guidelines (i.e., security PIN) to be eligible for reimbursement
6. Reimbursement can no longer occur through GEMS

B. Unit Responsibilities

1. Annual validation of:
  - a) Need for cell phone
  - b) % of business usage
2. Provide spreadsheet listing staff being reimbursed to the F&A Division Controller as part of the annual budget cycle
3. Provide a monthly update to the F&A Division Controller of any updates to the list of employees who receive stipend
4. Enforce the policy and request F&A Division Controller approval for all exceptions

**IV. International Charges**

For international business travel, the employee is responsible for submitting reimbursement of the international portion of the cell phone coverage through GEMS. The University will only reimburse for the business portion of the cost, i.e. for the days the employee is abroad.

**V. University Provided Cell Phones**

The issuance of a University provided cell phone is expected to be rare and should only occur when the phone is used 100% for business purposes. The University provided cell phone must be pre-approved by the lead fiscal supervisor of the respective F&A unit, approved by F&A Division Controller and acquired through ITS.

A. Employee Responsibilities

1. Devices must be returned upon an employee's separation from the University
2. Employees are to use the phone for University business only
3. Employees who receive a University cell phone must adhere and agree to the following:
  - a) Agree to set a security passcode
  - b) Agree not to put personal apps or games on the mobile device

B. Unit Responsibilities

1. The unit fiscal supervisor must approve University purchase of phones
2. All University phones must be purchased by ITS and cannot be paid for on a GEMS card
3. Annual validation of employee's need for a dedicated University provided device
4. A list of individuals with University phones must be reported to the Division Controller as part of the annual budget process

**VI. Access**

Employees with University issued cell phones or those who receive a stipend towards such services should be available to answer business related calls and/or emails during the times established and agreed upon with their respective supervisor. In addition:

- Employee is expected to have a professional voicemail greeting on their personal phone
- Employees must comply with federal, state and local laws pertaining to the use of cell phones
- Employee must comply with the [University of Chicago Policy on Information Technology Use and Access](#)
- Any cellular phone or mobile device mismanagement will result in cancellation of the phone or stipend