



Annual Mobile Communications Agreement For Employee-owned Device with a Nontaxable Allowance

Department: _____

Department Head: _____

Employee: _____

For Dates: From: _____ To: _____

Instructions

- Annually, the department head completes this form (items 1 - 4 below) for each employee who has been approved for a mobile communications device and plan and associated nontaxable allowance.
- The employee reviews the agreement and discusses it as needed with the department head, signs it, and returns it to the department head, along with a recent copy of the mobile communication bill. For device purchases or upgrades, the employee must furnish a copy of the receipt and return any amount in excess of the allowance provided within 90 days from the date of the purchase.
- The department head signs the agreement, forwards a copy to the employee, and retains the original with the mobile communication bill or receipt for the device purchase or upgrade for eight years for audit purposes.

Retroactive adjustments are not permitted.

1. Substantial Business Reason for Mobile Communications Device and Service Plan

a. Check the Substantial Business Reason(s) that apply:

The University's need to contact the employee at all times for work-related emergencies.

The University's requirement that the employee be available to conduct University business when the employee is away from the office.

The University's need to conduct University business with individuals located in other time zones outside of the employee's normal work day.

b. Describe the Substantial Business Reason. For example, is the employee required to be on-call (in possession of the device and with the device turned on) at certain times?

c. What employee duties and responsibilities require mobile access to telephone service, email, text messaging, data access/downloads, Internet access, and/ or group scheduling/calendars where such University business cannot be conducted by the use of a University provided computer, land-line phone, pager, or other communication device?



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2. Departmental Mobile Communications Device and Service Plan Requirements

Because the mobile communications device is owned by the employee, it may be used for personal as well as business use, but must be available for the performance of responsibilities as designated by the department. What are the minimum requirements for a device and plan to meet the business need? The department needs should dictate the type of device, device features, and service plan. The determination should include the appropriate number of plan minutes, long distance calling options, text messages, data plans, Internet access, and other plan features that are required for the performance of the employee's job responsibilities.

3. Monthly Nontaxable Allowance for Service Plan \$ _____

The monthly employee allowance for a service plan is based on anticipated University business need and use as outlined in this agreement.

4. One-time Nontaxable Allowance for Device Purchase \$ _____ (if the employee is to purchase a device during this year)

The one-time employee allowance for a device is based on anticipated University business need and use as outlined in this agreement.

Employee Certification

I certify that the descriptions of my Mobile Communications requirements meet the Substantial Business Reason definition; that I understand the department's device, service plan, and availability requirements; and that I am responsible for the purchase of a device and payment for a service plan to which the University will contribute the allowance amount(s) outlined in this Agreement. The monthly allowance does not exceed the expenses in maintaining the appropriate service plan. If either the monthly allowance exceeds the service plan or the one-time allowance exceeds the purchase price for the device, I will return the excess funds within 90 days. I have read and agree to the Employee Responsibilities as stated in the Mobile Communications Policy document.

Employee Signature: _____ Date: _____

Departmental Approval

I approve the nontaxable allowance(s) for the mobile communications device and service plan for the employee as outlined in this Agreement.

Department Head Signature: _____ Date: _____