



NORTHWESTERN
UNIVERSITY

Annual Mobile Communications Agreement For University-owned Device with Nontaxable Benefit

Department: _____

Department Head: _____

Employee: _____

For Dates: From: _____ To: _____

Instructions

- Annually, the department head completes this form (items 1 - 4 below) for each device owned by the department.
- For shared devices, a copy of the agreement must be reviewed and signed by each employee who uses the shared device.
- For devices assigned to individual employees, the employee reviews the agreement and discusses it as needed with the department head, signs it, and returns it to the department head.
- The department head signs the agreement, forwards a copy to the employee, and retains the original with receipts or other valid evidence of purchase and service plan contract for eight years for audit purposes.

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

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?



Annual Mobile Communications Agreement For University-owned Device with Nontaxable Benefit

2. Departmental Mobile Communications Device and Service Plan Requirements

Because the mobile communications device and/or tablet device is owned by the University, it 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 Service Plan Cost \$ _____

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

4. One-time Cost for Device Purchase \$ _____ **(if the department will purchase the device during this year)**

The device purchase cost 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 and tablet device, if applicable, requirements meet the Substantial Business Reason definition, is accurate and that I will meet the department's availability requirements. I understand that, University-owned devices must be primarily used for University business. I understand that any personal use of the University-owned device will be treated as a de minimis fringe benefit. However, any unusual or excessive personal service plan use of the University-owned device will be paid to the University based on documented device usage within 90 days.

Employee Signature: _____ Date: _____

Departmental Approval

I approve the mobile communications device and service plan, and if applicable, assignment of the device to the employee(s) as outlined in this Agreement.

Department Head Signature: _____ Date: _____