




**Policy Number:** 500.1

**Policy Title:** Electronic Communication Devices and Services (ECDS)

**Subject:** Section 500 – Financial Affairs

**Date Adopted:** October 8, 2010

**Date(s) Revised:** September 6, 2013; September 12, 2012

**Approved by:**   
\_\_\_\_\_  
Daniel J. Bingham  
Dean/CEO  
Helena College University of Montana

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**POLICY STATEMENT:**

It is the policy of the College to allow for the purchase or reimbursement of electronic communication devices and/or services for use by employees to conduct official College business.

All Helena College University of Montana policies shall adhere to and be consistent with relevant federal and state laws, rules, and regulations; with Board of Regents' policies and procedures; and with The University of Montana's policies and procedures.

## PROCEDURES:

### OVERVIEW

Electronic communication devices and/or services are defined as wireless, cellular and satellite phones; personal device assistants (PDA); tablet PC's; and home internet services. Procurement of such devices and/or services will be authorized ONLY when the job responsibilities require the employee to be accessible at all times.

Authorization and approval of such expenditures shall reside with the Leadership Team members. Review and renewal of such expenditures must occur annually in May. Prior to the approval of any request for purchase/reimbursement of electronic devices and/or service payments, the job responsibilities of the individual will be thoroughly reviewed to insure the electronic devices and/or services selected are warranted and will safeguard sensitive College information.

Payment for electronic communication devices and/or services can be made directly by the College or through a Taxable Allowance to qualified employees.

### EMPLOYEE ALLOWANCE PROCEDURES

#### Employee allowance for electronic communication devices (ECD) including internet service

An employee's supervisor is responsible to determine the need for an employee to have an electronic communication device (including internet service.) An ECD allowance can offset a portion of or all expense of the ECD or service.

1. It is the responsibility of the employee's supervisor to determine the dollar amount of the allowance for ECD. This amount should be based on the cost of service which allows the employee to conduct College business in an efficient manner. The allowance shall not exceed \$150/month or \$1,800 annually for all combined services.
2. After reviewing and approving an employee to receive an ECD allowance, **the ECD Allowance Request Form** must be completed and forwarded to the appropriate Leadership Team member, or designee, for signature. The form must then be forwarded to Human Resources with all applicable signatures and authorization. An ECD Allowance Request Form must be submitted to Human Resources no later than May 31<sup>st</sup> each year.

ECD Allowance Request Forms for newly qualified employees will go into effect within 30 days of receipt in Human Resources.

The ECD Allowance Request Form will provide approval to pay out the allowance in equal installments over the year based on the pay cycle in which the employee is normally paid.

This allowance does not constitute an increase to base pay and will not be included in the calculation of percentage increases to base pay due to annual increases, job changes, etc.

The employee must submit a copy of their active service contract to Human Resources at the time of authorization for ECD Allowance or as soon as the account is activated.

3. If data connection services through the College will be requested, individuals must work with Information Technology Services and complete the applicable forms.
4. Under IRS regulations, this allowance is taxable to the employee. The cost of the ECD allowance plus applicable employer/employee paid benefits will be an expense of the authorizing department's budget.

5. The employee must maintain an active ECD service plan as long as the ECD allowance is in place. The employee must notify Human Resources of changes to the service plan and provide updated service contracts to Human Resources.
6. A copy of the ECD Allowance Request Form and of the employee's active service contract will be kept on file in Human Resources the Business Office to comply with audit requirements.
7. An annual review of the business need for the ECD and associated allowance must be completed by the employee's supervisor. An ECD Allowance Request Form must be submitted to Human Resources no later than May 31st each year. This form will provide approval to pay out the allowance in equal installments over the year based on the pay cycle in which the employee is normally paid.
8. If the status of a qualified employee changes during the year and the employee should no longer need an allowance for ECD, Human Resources must be notified by ECD Allowance Request Form of this change.

### **Equipment purchase**

1. It is the responsibility of the employee to enter into the cellular phone contract, or contract for internet services, under their own name. The purchase of any equipment is also the responsibility of the employee.
2. A department may determine that an allowance for reimbursement to purchase equipment should be made by the College to the employee. The applicable section of the ECD Allowance Request Form must be completed and submitted to Human Resources for inclusion in the employee's wages. This allowance payment will be made to the employee on their next available paycheck.
3. A copy of the receipt for equipment purchases eligible for reimbursement must be kept on file in Human Resources with the ECD Allowance Request Form to comply with audit requirements.

### **Change to status**

1. If the employee changes the ECD service contract, as in modification or termination, then the employee may bear the cost of any fees associated with that change. For example, if the employee terminates employment with the College and no longer wants to keep the ECD service contract, then the cost of that change may be the employees'. The departmental manager will make the determination of who pays for any fees associated with changes.
2. If the College should determine that it is necessary for the employee to terminate or change the ECD service contract, then the College will bear the cost of any fees associated with that change. Reimbursement of such expense will be made to the employee through Accounts Payable.

## DEPARTMENTAL PURCHASES PROCEDURES

Departmental purchase of Electronic Communication Devices (ECD) and/or services should be the exception. The departmental head in consultation with their supervising member of the Leadership Team will determine the appropriateness of such departmental expenditures.

### Obtaining Electronic Communication Devices and Services

1. Research the available options for electronic communication devices (ECD) and services including state term contracts. Questions about available options should be directed to the Information Technology department.
2. Once a department decides on the necessary services and/or devices, an ECD Departmental Authorization Form (attached) must be completed by department personnel with authorization from the applicable Leadership Team member.
3. Submit the form to the Information Technology department.
4. Requests for Blackberry services through the College must be approved and coordinated with the Information Technology department.
5. Once services have been established with a vendor, forward a copy of the ECD Departmental Authorization Form to the Business Office – Accounts Payable. If billing questions arise, Accounts Payable will work with the indicated departmental contact.

### Departmental Payment for Electronic Communication Devices/Services

1. Payments made directly by the College to vendors can be made via ProCards or Banner Invoices.
2. Please see the Business Office for details regarding both payment options.
3. Only official business may be conducted on any College purchased electronic communication device or service. It is the responsibility of the departmental manager to ensure reimbursement from the employee for any personal use of the ECD. This is to ensure compliance with IRS regulations and state policies. The reimbursement may be a proration of the monthly fees or a predetermined reimbursement rate. Reimbursement must occur within thirty (30) days after receipt of the invoice.
4. Employees may also be reimbursed for occasional official business use of their personal ECD. An employee must provide original documentation of the business related expenditure (personal ECD bill with overage charges and/or log substantiating business use.) Employee reimbursements can occur on a Direct Pay Invoice.

### Change to Departmental ECD Services

1. If for any reason the department needs to change the ECD service contract, a modification or termination, the department should work directly with their ECD service provider. The department will bear the cost of any fees associated with that change. Payments made directly by the College to vendors can be made via ProCards or Banner Invoices.

## **Record Retention**

1. All departmental documentation for payments of ECD shall be supported by an original detailed invoice from the service provider. The documents must also include support of managements review, detailed use records and any reimbursement documentation for personal use.
2. All departmental documentation must be available for review and audit upon request from Business Office personnel, Internal Auditors or Legislative Auditors.
3. All departmental documentation must be maintained in accordance with State of Montana’s General Records Retention Schedule
4. Annually, the departmental administrator must review and renew such expenditures to ensure the electronic devices and/or services are warranted. The review of availabilities of services may warrant a change in departmental ECD. Changes to ECD/services must follow Obtaining Electronic Communication Devices and Services Procedures noted above.

**ECD ALLOWANCE REQUEST FORM**  
**ELECTRONIC COMMUNICATION DEVICES AND SERVICES**



Complete an ECD Request Form (1) once each fiscal year for any employee already receiving a monthly allowance for electronic communication device or service and submit to **Human Resources** the Business Office by **May 31st** June 15th for fiscal year employees and **July 31st** August 15th for academic year employees for the renewal of the allowance; (2) for employees newly qualified for an ECD allowance; (3) for change of status to ECD allowance; (4) for termination of ECD allowance; or (5) for request of one-time payment of allowance for equipment.

**\*\*PLEASE NOTE: INCOMPLETE FORMS WILL RESULT IN DELAYED PROCESSING\*\***

Employee Name: \_\_\_\_\_ Employee Identification No: \_\_\_\_\_

Department: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Begin date: \_\_\_\_\_ End date: \_\_\_\_\_  
*(allowances will terminate automatically each fiscal year end)*

**Annual** amount of ECD allowance: \$ \_\_\_\_\_  
*(this will be pro-rated and paid each pay cycle)*

Current Job Title:  Faculty  Contract Administrator/Professional  Classified Staff

Department Contact: \_\_\_\_\_ Ext No: \_\_\_\_\_

**Check Appropriate Box:**

- Establish new ECD allowance for employee
- Renew ECD allowance for fiscal year \$ \_\_\_\_\_ *(submit form to HRS by June 15th each year)*
- Terminate ECD allowance for employee *(allowance will terminate automatically if not renewed each fiscal year)*
- Request one time allowance for equipment purchase
- Change annual amount of ECD allowance / New Amount: \$ \_\_\_\_\_
- Change of Index number for ECD allowance / New Index: \$ \_\_\_\_\_

| Position: | Index: | Account: | FTE: | Pay (Opt): | Special Conditions: |
|-----------|--------|----------|------|------------|---------------------|
|           |        |          |      |            |                     |
|           |        |          |      |            |                     |
|           |        |          |      |            |                     |
|           |        |          |      |            |                     |

**Note: If funding source is from a grant, you must verify that the grant is able to accept charges for the purpose of allowance to employees for electronic communication devices and services.**

**Form must be signed by department head and appropriate Leadership Team member**

**Approval Signature(s)/Date:**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Electronic Communication Devices**  
**Departmental Form**



Electronic Communication Device/Service to be issued to: \_\_\_\_\_

**Departmental Billing Address**

Helena College University of Montana  
Business Office  
1115 North Roberts  
Helena, MT 59601

**Authorized Billing**

Department: \_\_\_\_\_

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Index: \_\_\_\_\_ Account code: 62319

Existing Master Account ID or Cellular Number: \_\_\_\_\_

**Signature Approval/ Date**

I certify that the above named department or individual has a business need for an electronic communication device to perform their job duties. The electronic communication device will only be utilized for legitimate business purposes and any personal use will be properly reimbursed in accordance with University procedures.

Director/Chair: \_\_\_\_\_ Date: \_\_\_\_\_

Leadership Team Member: \_\_\_\_\_ Date: \_\_\_\_\_

Cell phone and Blackberry Service questions, contact IT, 447-6960

**Vendor Selected**

WSCA Contract S1907:

- Verizon Wireless
- AT&T
- Discountcell Inc
- Tessco

Other:

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