

Process for New Requests (ex.: new hires)

Manager/Supervisor and Employee:

- Review Electronic Device and Services Policy and FAQ's.
- Supervisors should discuss and monitor the use of electronic devices and services by non-exempt staff. Additional time worked may need to be reported for business use during non-working hours, such as during lunch, in the evening, and the weekend; and may include overtime compensation.
- Understand department guidelines for eligibility (job duties and responsibilities) for technology allowance.
- Review brackets for allowance (low, medium, medium plus, high) and how they are to be applied within your area for consistency.
- Understand technology requirements supported by your department (blackberry/imap/mobile 5.0/pagers).
- **Option 1:** Form - Electronic Device and Services Policy Technology Allowance - Procedures and Agreement. Use this form for employees who will receive a technology allowance for business use of personally owned services/equipment.
 - Discuss business need, type and level of services required to perform job duties and responsibilities.
 - *Employee Equipment Purchases (Optional):* If you have been approved for an equipment purchase, consult with your departmental IT staff to verify device to purchase. Devices supported by ITaP Desktop Computing Services are available at <http://www.itap.purdue.edu/telephone/services/staff/cellular.cfm>. Go to cellular vendor store or cell vendor website to purchase service plan and equipment - ask for PU employee discount - provide PUID.
 - Voice plan – select plan to cover estimated business and personal use.
 - Data plan - For blackberry devices with email accounts on the ITaP, Physical Facilities, or CS Exchange Server - order unlimited data plan for Corporate Blackberry Enterprise Server (activation instructions will be provided by ITT). Obtain receipt for equipment for reimbursement. Bring to Manager/Supervisor for submission to the Business Office.
 - Provide cell number, and blackberry pin number (needed for activation on PU blackberry server) to Manager/Supervisor to complete Agreement.
 - ITT will contact you with activation instructions.
 - Use document - Process to calculate technology allowance payments and brackets.
 - Complete Electronic Device and Services Policy Technology Allowance Agreement. Be sure to enter personal cell number and service Start Date (under Electronic Device (Cell) Number).
 - Return signed Agreement and actual equipment receipt (if applicable) to Business Office for department approval and allowance processing.
- **Option 2:** Form - Employee Agreement for University Owned Electronic Device and Services. Use this form for employees who will be assigned University owned device.
 - Discuss IRS documentation requirement to avoid calculating and recognizing imputed income on the employee's W-2.
 - Provide email addresses for monthly billing statements – statements are used to document calls as personal or business. Personal use over 10 minutes per month is to be reimbursed.
 - IT Telecommunications will email monthly usage statements to Employee and Supervisor.
 - Employee will document monthly usage. Documentation must be maintained for two years following the fiscal year in which calls were made.
 - Manager/Supervisor and Employee sign Agreement.
 - Return signed Agreement to Business Office for department approval and to process request for new service.

Business Office Procedures

Option 1: Manager/Supervisor has approved employee to receive a technology allowance for business use of personally owned services/equipment and submitted signed Electronic Device and Services Policy Technology Allowance Agreement.

To reduce the number of forms used to make Technology Allowance payments and establish IT support - Departments may now submit final approved Technology Allowance forms to the Shared Service Center in FREH for one time equipment reimbursements and monthly allowances; and to the Tel Office and ITaP DCS to establish IT support. With the change additional ADPAY and Form 77 processing will not be needed.

Departments should only use Technology Allowance forms with Last Revision of 7/09, so the appropriate key fields from the ADPAY process are submitted.

Form distribution:

- Original Technology Allowance form with dept/comptroller approvals should go to SSC/FREH. No equipment receipts are needed.
- Copy to BO payroll file with receipt employee submitted, if equipment was purchased.
- Copy faxed to Tel Office 49534.
- Copy to unit providing information technology support. If ITaP DCS, fax to 61484.

Comments:

- The SSC will audit for Department and Comptroller approvals. Signatures are needed for both lines.
- If appropriate, for the first or last month of service prorate the monthly recurring allowance by the number of calendar days the service was active (not business days worked) and enter on the form.

Option 2: Manager/Supervisor has approved employee to carry University owned device and signed Employee Agreement for University Owned Electronic Device and Services.

To reduce the number of forms used to request University Owned devices and services and to establish IT support, Departments may now submit final approved University Owned Device and Services Agreement to IT Telecommunications and ITAP DCS to establish IT support. With the change a Form 77 will not be needed.

Department should only use Employee Agreement for University Owned Device and Services with Last Revision of 7/09 so the appropriate account number fields are provided.

Form Distribution:

- Employee Agreement for University Owned Electronic Device and Services with dept/comptroller approvals should be faxed to IT Telecommunications 49534
- Copy to unit providing information technology support. If ITaP DCS, fax to 61484
- ITT will issue quarterly management reports to Business Office.
- Annually - Business Office checks with Supervisor to determine if documentation has been completed (October timeframe). If documentation is not completed, the cost of the device and services will be reported as taxable income on the employee's W-2.