

## **UNIVERSITY OF WISCONSIN – SUPERIOR**

### **Policy Subject: ACQUISITION AND USE OF WIRELESS HANDHELD VOICE AND DATA SERVICES AND EQUIPMENT**

Cabinet Division: **Administration & Finance**

Date Revised: July 2010

#### **I. Background and Purpose**

Wireless service has increased mobility and flexibility for many campus departments. As the use of cellular phones and wireless devices grows, so does the cost to the campus. In the interest of insuring that the best quality service for the most economical cost is obtained, this policy covers the acquisition and use of cellular phones, blackberry devices and laptop/other equipment that utilizes wireless communication to transfer data. Employees must consider other viable options such as a landline phone, university calling cards, university internet access, pagers or other less expensive communication devices before approving the costs for electronic mobile devices and services. This policy is in concert with the Wisconsin Department of Administration (DOA) Wireless Handheld Voice and Data Services and Equipment Policy.

#### **II. Constraints**

- 2.1 Wisconsin Department of Administration (DOA) “Wireless Handheld Voice and Data Services and Equipment Policy” (Attachment 1)
- 2.2 Wisconsin Open Records Law

#### **III. Definitions**

Wireless communication is the transfer of information over a distance without the use of electrical conductors or wires. The distances involved may be short (a few meters as in television remote control) or very long (thousands or even millions of kilometers for radio communications). When the context is clear the term is often simply shortened to "wireless". Wireless communication is generally considered to be a branch of telecommunications. It encompasses various types of fixed, mobile, and cellular telephones, personal digital assistants (PDA's) and wireless networking that utilizes a cellular signal to provide wireless data transfer by using either analog or digital signal to a network of transmitters to make connections to regular or other mobile telephone lines.

## IV. Policy Statements

- 4.1 The UW-Superior wireless service is covered by the state contract # 15-91575-70X. All purchases of wireless device services will be arranged through the UW-Superior Purchasing Department in order to insure that standard services are received at the lowest cost available.
- 4.1.1 Employees may be candidates for state-assigned Wireless Services if they:
- Are required to remotely access their email or calendar on a regular basis in order to carry out their job responsibilities;
  - Must remotely complete time sensitive work on a regular basis;
  - Have responsibilities related to emergency response or continuity of business services;
  - Can significantly increase productivity and/or reduce overall expenses for the State by using state assigned Wireless Services; or Can otherwise establish that Wireless Services are necessary.
- 4.1.2 No payment should be made from a University cost center for excess charges incurred from personal use of wireless devices.
- 4.1.3 State provided Wireless Services are intended for state business. Personal use of Wireless Services is prohibited, except for essential personal calls and calls otherwise permitted under a collective bargaining agreement or the Compensation Plan (such as calls relating to overnight travel provisions). Essential personal calls are defined as calls of minimal duration and frequency that are urgent in nature and cannot be made at another time or from a different telephone (see Attachment 1).
- 4.1.4 The ordering and cost of equipment classified as optional accessories (equipment that does not come with each new service such as additional car/home charger, carrying case, etc.) will be the individual's responsibility/expense unless supervisory approval is provided and justified in writing.
- 4.1.5 Replacement and upgraded equipment requires supervisory justification and approval.

## V. Policy Requirements

- 5.1 Supervisor  
Supervisor is responsible for:
- 5.1.1 Determining that wireless services are needed for employee's job responsibilities and documenting the request on the form titled "Requests for Wireless Services" (Attachment 2).
- 5.1.2 Performing an annual review of employee's wireless service usage to determine if there is a continuing need of the equipment and services and if it is cost justified.
- 5.1.3 Responsible for obtaining reimbursement for unallowable calls. Notify the Purchasing Department of significant changes to a user's wireless services, to ensure the user(s) are on the appropriate plan.
- 5.1.4 When an employee leaves position or is no longer an authorized user the Supervisor must obtain the wireless device and submit to the Purchasing Department. (Note: Supervisor is ultimately responsible for ensuring the Purchasing Department is notified of terminated employees and for returning the wireless device to the Purchasing Department). This will give the Purchasing department ample opportunity to cancel any respective contracts.

5.2 Purchasing Department:

Purchasing Department is responsible for:

- 5.2.1 Maintaining the Requests for Wireless Services (Attachment 2).
- 5.2.2 Providing guidance on which plan/device best and most economically meets end user needs, placing orders with vendor and changing plans.
- 5.2.3 Ensuring the authorized user receives a written copy of the Wisconsin Department of Administration (DOA) “Wireless Handheld Voice and Data Services and Equipment Policy” (Attachment 1).
- 5.2.4 Obtaining employee receipt of wireless services policy by completing and maintaining the form titled “Acknowledgment of Receipt” (Attachment 3).

5.3 Authorized User:

Authorized user is responsible for:

- 5.3.1 Complying with the Wisconsin Department of Administration (DOA) “Wireless Handheld Voice and Data Services and Equipment Policy” (Attachment 1).
- 5.3.2 Completing the Acknowledgment of Receipt form (Attachment 3).
- 5.3.3 Resolving questionable charges by audit department within 10 business days.
- 5.3.4 Having applicable password security enabled at all times when users have access to state data and files.
- 5.3.5 Contacting the Purchasing Department if device is lost or stolen. Contacting the University Wisconsin-Superior Helpdesk immediately if they suspect that there has been an unauthorized access to their data or files. Users are reminded that all emails are unsecured and should not contain personal information like birthdates, credit card numbers and social security numbers.
- 5.3.6 Notifying the Purchasing Department if employment is terminated and submitting the electronic devices to the Supervisor.
- 5.3.7 Signing monthly statements verifying there were no personal calls made or if there were personal calls made, preparing a departmental deposit for those calls. Purchasing Agent can be consulted with questions on this process.

5.4 Cost Center Manager

Cost Center Manager is responsible for:

- 5.4.1 Distribution of monthly wireless service invoice to authorized user for review and approval.

**VI. Compliance**

Wireless device usage and policy compliance will be reviewed periodically by the campus auditor. Users will be required to repay any audit disallowance for excess charges or personal use. Violation of wireless services policy may result in the loss of wireless device.

**VII. Attachments**

- 7.1 Wisconsin Department of Administration Wireless Handheld Voice and Data Services and Equipment Policy (Attachment 1)

- 7.2 Requests for Wireless Services (Attachment 2)

- 7.3 Acknowledgment of Receipt (Attachment 3)

# ATTACHMENT 1- WISCONSIN DEPARTMENT OF ADMINISTRATION



**WISCONSIN DEPARTMENT OF  
ADMINISTRATION**

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August 15, 2008

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This updated policy is being distributed to State agency and UW System officials. State and university officials are responsible for distributing or posting this information so that all State employees are aware of the updated policy provisions. Please contact the Division Administrator of the Division of Enterprise Technology, Department of Administration, with any policy questions.  
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## **Wireless Handheld Voice and Data Services and Equipment Policy (Wireless Services)**

This document sets forth the State's policy on the use of state-assigned Wireless Handheld Voice and Data Services and Equipment, including cellular phones, Blackberry type devices, SmartPhones and laptops/other equipment that utilize a cellular signal to provide internet access, hereinafter collectively referred to as "Wireless Services".

Wireless Services provide authorized users with the capability to do one or more of the following from a handheld device:

- Send and receive e-mail and/or data
- Place and receive calls
- Remotely access files, calendars, address books and task lists
- Research and browse the web
- Access and run various applications

### **I. ASSIGNMENT OF STATE WIRELESS SERVICES**

#### **A. Job Requirements**

Employees may be candidates for state-assigned Wireless Services if they:

- are required to remotely access their email or calendar on a regular basis in order to carry out their job responsibilities;
- must remotely complete time sensitive work on a regular basis;
- have responsibilities related to emergency response or continuity of business services;
- can significantly increase productivity and/or reduce overall expenses for the State by using state assigned Wireless Services; or
- can otherwise establish that Wireless Services are necessary.

#### **B. Requests for Wireless Services**

When a supervisor determines that Wireless Services are needed for an employee's job responsibilities, the supervisor shall submit a request to the state agency division administrator, university official or other appropriate individual, for review/approval consistent with the department's internal procedures. Requests shall document the need and benefit of using this technology, including service/device costs and cost justification. Cost savings that would be realized by consolidating services into one device to replace other devices such as a laptop, cellular phone,

PDA, or pager should be documented in the request. Whenever frequency of use does not justify an individual assignment, Wireless Services should be shared or pooled to maximize savings. When pooling or sharing of Wireless Services does not meet operational needs, an employee may be individually assigned a wireless device and service.

If there has been or will be a significant change in the usage of Wireless Services, the supervisor should notify his/her Telecom staff as soon as possible, to ensure the Wireless Service for that user or users, is on the appropriate plan.

### **C. Approvals**

Because of the initial and ongoing costs associated with these devices and short product life cycles, care should be taken to approve the least expensive solution that meets user needs and then only for employees who can clearly demonstrate the way this technology will help them perform their job duties in a more efficient manner.

### **D. Employee Receipt of Wireless Services**

Employers, via a supervisor, a designated staff member, or Telecom Staff (see definition below), must provide a copy of this policy and an Acknowledgment of Receipt form (attached) to any employee using any state-assigned Wireless Services. The employee's supervisor or a designated individual is responsible for obtaining a signed Acknowledgement of Receipt form from those employees and keeping it on file for the duration of the employee's use of Wireless Services and any additional time determined by the agency or university records retention schedule.

## **II. TELECOM STAFF RESPONSIBILITIES**

### **A. Overall Responsibilities**

Telecom Staff is defined, for the purposes of this policy, as the agency or university telecommunications manager or qualified designee from that agency or university's telecom group.

Each agency or university Telecom Staff shall be the single point of contact for his/her agency or university for placing orders with the vendor, filing Wireless Services approvals for audit review, changing plans, requesting waivers from DET, ensuring compliance with State contracts and policy requirements, and providing guidance on which plan/device best and most economically meets end user needs.

The State's mandatory contracts for Wireless Services must be utilized for all specified Wireless Services contracted therein and staff must comply with all contractual terms, conditions, ordering and maintenance procedures. Waiver requests must be directed to and approved by the Voice Services Section (608-266-1032), Bureau of Business Services in the Division of Enterprise Technology, in advance of any deviation from the mandatory contracts.

### **B. Monthly Plan Review**

Telecom Staff shall review Wireless Service bills on a monthly basis to ensure that each employee is on the most cost effective plan that most closely matches his/her typical usage patterns. Recommendations for changes in plan assignment should be documented. Per agency or university internal procedures, staff familiar with an employee's usage is also responsible for reviewing/approving monthly Wireless Services billing.

### **C. Annual Needs Review**

Telecom Staff shall ensure that supervisors, or other authorized staff, annually review Wireless Services usage to determine if there is a continuing need for the equipment and services and if it is cost justified. Supervisors or other authorized staff should contact their Telecom Staff when a determination is made to disconnect or reassign service.

#### **D. Annual Distribution of Policy**

Telecom staff shall annually distribute the policy to supervisors and service approvers to ensure that all employees who use Wireless Services receive the policy and have an acknowledgement form on file.

### **III. Employee Use of Wireless Services**

#### **A. Personal Use of Wireless Services**

State provided Wireless Services are intended for state business. Personal use of Wireless Services is prohibited, except for essential personal calls and calls otherwise permitted under a collective bargaining agreement or the Compensation Plan (such as calls relating to overnight travel provisions). Essential personal calls are defined as calls of minimal duration and frequency that are urgent in nature and cannot be made at another time or from a different telephone. Examples of essential personal calls are calls to arrange for care of a child or other family emergency, to alert a family member of an unexpected delay due to a change in work schedule, or to arrange for transportation or service in the event of car trouble, etc.

Agencies and university organizations must ensure compliance with the personal use restrictions articulated in this policy by implementing procedures so that employees who use Wireless Services, or a designated staff member who is familiar with the employees' usage, conduct a monthly review of Wireless Services billing to identify personal calls prohibited by this policy. Employees must reimburse the state for all personal calls that violate this policy at the state contracted per minute rate plus 6 cents per corresponding minute and any additional amounts for applicable toll or roaming charges, miscellaneous fees and taxes.

When an employee is authorized to use an individually assigned wireless device, his or her employer may permit a personal cellular number to be added to a state issued wireless device or the state number to be added to the employee's personal cellular phone as long as each number has its own calling plan, no personal plan or device charges are billed to the State account, and the personal billing account statements are kept separate from the state business billing account statements.

#### **B. Safety**

Safe use of Wireless Services is of the utmost importance, so employees are responsible for using that service in a safe and prudent manner. When driving a vehicle or operating potentially hazardous equipment, an employee's attention should be fully directed to that activity. As a general rule, Wireless Services should not be used in either situation, and Wireless Services should be turned off, allowing incoming calls to go to voice mail. If it becomes unavoidable to use Wireless Services in those situations, precautionary measures should be taken, including:

- Use hands-free devices. Make sure they are positioned where you can easily reach them with your seatbelt on and that all accessories are properly attached before you start driving.
- Let someone else drive the vehicle or operate the equipment if you are expecting an important call.
- Let the caller know you are driving a vehicle/operating equipment and indicate that you'll return the call as soon as it's safe to do so.

- Stop the vehicle/equipment in a safe and legal location if the call is distracting or reading/writing is required during the call.

**Note: Drivers are expected to know and observe all applicable state and local laws relating to the operation of motor vehicles while using a wireless device.**

**C. Security**

All State provided devices must have applicable password security enabled at all times when users have access to state data and files. Users who have lost their device or suspect that there has been an unauthorized access to their data or files must contact their Agency's helpdesk immediately. Services may be suspended until the security issue is resolved.

**D. Records Management**

Because the technology associated with Wireless Services may provide the capability for sending and receiving data, it is possible that public records may be created that must be retained or disposed of according to your agency or campus guidelines. Records created from the use of this device may also be subject to the Open Records Law. Employees must consider whether they are creating a public record when they use Wireless Services.

**E. Number Portability**

In the event of a change of vendors in the state's Wireless Services contract, cellular numbers may be ported (transferred) from one vendor to another. However, the State's policy prohibits porting a state landline business number to a cellular phone. In addition, porting personal cellular numbers to a state account and porting state cellular numbers to a personal cellular account are prohibited to minimize co-mingling personal and business calls.

**F. Compliance with Policy**

Employees are expected to use state-assigned Wireless Services responsibly and in accordance with this policy, applicable enterprise and/or agency policies governing internet and email usage, and applicable work rules. Use of Wireless Services in violation of the aforementioned may result in revocation of the Wireless Service assignment and possible disciplinary action against the employee.

**G. Termination of Use**

When an employee leaves his/her position or is no longer an authorized user, the state owned equipment must be turned into his/her supervisor or the state number removed from the employee's personal cellular phone, if the account is set up that way. The supervisor should contact agency Telecom Staff if the device/service will be reassigned or disconnected.

Authorized By:

Effective: August 29, 2008

  
Deputy Secretary



**ATTACHMENT 2 – REQUEST FOR WIRELESS SERVICES**

The following request is completed by the Supervisor, who determines that wireless services are needed for an employee’s job responsibilities. This request is to be forwarded to the Purchasing Department for wireless service procurement.

Employee First Name		Employee Last Name	
Department Name			
Cost Center Number		Cost Center Name	

Employees must meet one or more of the position requirements below to be candidates for state assigned wireless services. Please check all that apply.

- Position requires remote access to email or calendar on a regular basis in order to carry out job responsibilities.
- Position must remotely complete time sensitive work on a regular basis.
- Position is responsible for emergency response or continuity of business services.
- Use of state assigned wireless services in this position can significantly increase productivity and/or reduce overall expenses for the State.
- Other (please type justification to support business need)

The Cost Center Manager and Supervisor acknowledge that an “annual needs review” of the wireless services usage will be performed to determine if there is a continued business need for the equipment and services.

\_\_\_\_\_  
 Cost Center Manager Name (printed)

\_\_\_\_\_  
 Cost Center Manager Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Supervisor’s Name (printed)

\_\_\_\_\_  
 Supervisor’s Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Purchasing Department Signature

\_\_\_\_\_  
 Date

Purchasing Department - Retain this form for the duration of the employee’s use of Wireless Services and any additional time determined by the agency or university records retention schedule.

