

Human Resources

Cellular Telephone Purchase and Service Allowance Agreement

Employees and their supervisors to document their request for cell phone allowance and/or purchase and acknowledge their understanding of the [NAU Cellular Telephone Policy](#) requirements and limitations. The policy was last revised on January 10, 2020.

Employee Name: _____ Employee ID #: _____

HR Department Name: _____ HR Department #: _____

PeopleSoft Financials Speedchart #: _____ Position # for cell phone allowance: _____

Start Date: _____ End Date: _____

Add cellular or change telephone allowance:

You must meet at least one of the following criteria to receive the allowance:

- The job requires considerable time outside the office (travel, meetings, conferences, etc.) and use of an electronic device facilitates the effective maintenance of business operations while away.
- The job requires the employee to be immediately accessible to receive and/or make frequent business calls outside of working hours.
- Job duties away from the office may expose the employee or others to immediate harm or danger (e.g., visits to homes of patients or clients).

The cell phone allowance is intended to reimburse the employee for the average business use of the cell phone, not to pay the entire phone bill. The allowance will be charged to an account specified by the employee’s supervisor, who must ensure availability of funding. Departmental eligibility criteria can be more (but not less) restrictive than the university criteria stated above. No cellular telephone reimbursement or service allowance will be paid with grant restricted funding. Departmental purchase of a university cellular telephone plan for service is an option for grant-funded employees in accordance with applicable policy or contractual requirements.

Allowance for use of personal phone (complete listed information):

1. Ten (10) digit phone number: _____
Employee will be available for calls (in possession of the phone and have it turned on) during those times specified by manager.
2. Phone number is listed in LOUIE? Yes No
3. Allowance amount per month (from the table below): \$ _____

Cell Phone Allowance (in addition to 15% vendor discount for NAU employees)

Monthly Allowance	
Voice & text	Up to \$20
Voice, text & email/data	\$50

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Cellular telephone purchase reimbursement (*once every three years*):

The university may assist with paying half of the cost of the purchase of a cell phone device as shown in the table below. Employee must provide bill or purchase receipt for their cell phone in order to receive this allowance.

1. Purchase amount (from the table below): \$ _____

Phone Purchase Allowance	One-time amount every three years up purchase of new phone
Any mobile phone (includes protective case)	Half of cost up to \$150

A copy of the bill or purchase receipt for the telephone must be attached to this agreement.

Date of last cellular telephone purchase for which allowance was received: _____

CellularTelephoneSupport

Users who are authorized to use a smartphone and wish to utilize ITS technical support for email or calendar integration, must choose a provider and device shown on the [ITS website](#). Support for the cell phone portion of these types of devices must obtain technical support from the vendor providing the phone.

EmployeeInformationandResponsibilities

The Internal Revenue Service considers NAU's cellular purchase reimbursements and service allowances to be taxable income to the employee. Additionally, the cellular telephone service allowance is considered wages for retirement contribution purposes. Eligibility for the allowance or the level of the allowance provided is subject to change or cancellation without notice at any time. Supervisors may periodically request documentation of cellular telephone business use to confirm the appropriateness of eligibility and the monthly allowance amount.

CellularTelephoneAllowanceCancellation

Employee must inform their department to discontinue the allowance when the eligibility criteria are no longer met or when the cellular service is canceled. The *Cellular Telephone Purchase and Allowance Agreement* form must be completed with the **Cancel Cellular Telephone Allowance** box checked below. If such notification is not submitted within 30 days of no longer meeting criteria or service cancellation, the employee must repay any allowance received. The *Cellular Telephone Allowance and Purchase Agreement* form must be completed, checking the box marked **Cancel Cell Phone Allowance** located below if the employee is leaving the university or being transferred to a different department.

Cancel telephone allowance with an effective date of: _____

DocumentationRequirements

A completed and signed *Cellular Telephone Purchase and Allowance Agreement* is required. It must include the appropriate position number designated for cell phone allowance and a start date. The allowance will continue until changed or canceled, but supervisors must review the allowances periodically to ensure policy compliance.

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- To obtain a position number for the cellular telephone allowance, send an email to the Budget Office requesting a Mobile Phone Allowance position number. Include your funding chart field string (PeopleSoft Financials Department ID, Fund, Program) HR Department Number, and Reports To position number and enter that position number at the top of this document.
- If your business need is short term (e.g. 3 months out of the year), you must put a start and stop date on this document.
- Retain a copy of all records in department.

By signing below, the employee and authorizing managers acknowledge that they have read and reviewed their responsibilities under the [Cellular Telephone Purchase Reimbursements and Service Allowances Policy](#). This cell phone allowance agreement must be approved by the employee's supervisor, Dean/Director, and Vice President.

Employee Name: _____

Employee Signature: _____ Date: _____

(If I am subject to repayment, I agree to have that amount deducted from my paycheck.)

Supervisor Name: _____

Supervisor Signature: _____ Date: _____

Dean/Director Name: _____

Dean/Director Signature: _____ Date: _____

Vice President Name: _____

Vice President Signature: _____ Date: _____