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Subject: **CELLULAR TELEPHONES AND BLACKBERRY® DEVICES**
Reference: A2502 Expense Claims
Links: FORM A2507 - 1
Contact: Business Services, Information Technology Services

1. Purpose

- 1.1 This Administrative Procedures Memorandum (APM) provides guidance to employees of the Simcoe County District School Board (board) for the use of and reimbursement for cellular telephones (cell phones) and BlackBerry® devices, while carrying on the business of the board.

2. General

- 2.1 The board requires some of its employees to use a cell phone or BlackBerry® on a regular basis, in order to carry on the business of the board.
- 2.2 The board will supply and maintain a cell phone or BlackBerry® for each employee who it requires to use a cell phone or BlackBerry® on a regular basis for board business.
- 2.3 The board provides cell phones or BlackBerry® devices to employees for business purposes only.

3. Employee Required to Use a Cell Phone or BlackBerry® on a Regular Basis

- 3.1 A director, superintendent, manager or principal who requires an employee to use a cell phone or BlackBerry® to carry on the business of the board shall:
 - 3.1.1 authorize the employee to have the cell phone or BlackBerry® and authorize the related charges to be made to his/her department/location budget by completing a Helpdesk Ticket
 - 3.1.2 have the employee complete and sign the acknowledgement section of FORM A2507 - 1 acknowledging his/her understanding of and agreement to the conditions and procedures in this APM
 - 3.1.3 forward the completed and signed form to Information Technology Services – (ITS) Attention: Help Desk.
 - 3.1.3.1 ITS will add the appropriate unlimited long distance package to the phone number and record the date.



3.1.3.2 The form shall be forwarded to Human Resource Services where it will be kept in the employee's personnel file.

4. Board-owned Cell Phone or BlackBerry®

- 4.1 All board cell phone and BlackBerry® purchases and plans are coordinated through ITS. ITS shall manage the purchasing, repairs, maintenance, distribution and electronic notification of the monthly statements to departments and employees for all board-owned cell phones and BlackBerry® devices.
- 4.2 Cell phones and accessories belong to the board and shall be returned to the ITS Helpdesk for future re-assignment if: an employee leaves the board or if the cell phone plan is cancelled. FORM A2507 – 1 shall be completed for such transactions.
- 4.3 BlackBerry® devices have employee specific information and setup, such as email and address book information. For this reason, the BlackBerry® will remain with the original user until it is no longer required for the business of the board.
 - 4.3.1 Any employee, with a BlackBerry®, who has changed locations or business units, shall update this information by completing FORM A2507 – 1 and submitting through the Helpdesk. The employee shall also indicate the previous business unit and sub-ledger numbers and the new business unit and sub-ledger numbers for the allocation of expenses.
- 4.4 Any employee who is leaving the board, shall initiate cancellation of board owned cell phone or BlackBerry® by completing the deactivation section of FORM A2507 – 1 and submitting to the Helpdesk.
- 4.5 All requests related to cell phones and BlackBerry® devices will require a Helpdesk ticket for, billing inquiries, service, repairs, training and updates.

5. Charges Not Covered Under the Board's Plan

- 5.1 For board approved cell phones and BlackBerry® devices, the board's plan does not cover personal local and long distance charges, text subscriptions, directory assistance, ring tones, picture or video attachments sent by text messaging and roaming charges. Any charges related to these services will be reimbursed by the employee to the board.
 - 5.1.1 BlackBerry® devices have a Canada 411 application which allows free directory assistance services. There are no charges associated with this application or for the completion of the call, unless long distance charges apply.

6. Cell Phone and BlackBerry® Use Outside Canada.

- 6.1 The cell phone, text messaging and data plans are for board business in Canada. Usage of a cell phone or BlackBerry® outside of Canada will result in roaming charges.



- 6.1.1 Supervisors of employees traveling outside of Canada on board related business shall put a request into the Helpdesk at least one week in advance. ITS will determine the options available at that time which may minimize the cost of using the cell phone or BlackBerry® for the length of the trip.
- 6.1.2 Employees travelling outside of Canada, on board related business shall make a reasonable effort to keep all cell phone or BlackBerry® use to a minimum and only for board related business.

7. Personal Use of a Board-owned Cell Phone or BlackBerry® by an Employee

- 7.1 The board provides cell phones and BlackBerry® devices to employees for business purposes only.
 - 7.1.1 When carrying on the business of the board, there may be situations when a personal call using a board-owned cell phone or BlackBerry® is necessary. Employees are expected to keep such personal use to a minimum.
 - 7.1.1.1 Any additional charges related to personal usage as outlined in section 5, must be reimbursed to the board. Additional usage charges will be noted as exceptions in the individual detailed monthly reports as identified in section 8.2.3. Failure to comply including non payment could result in termination of the cell phone or BlackBerry® and/or disciplinary action.
- 7.2 An employee may use his/her board-owned BlackBerry® for personal use for text messaging, email and internet browsing. All BlackBerry® devices have unlimited text messaging, internet browsing, instant messaging and email. Employees may use these features in Canada, without the requirement to reimburse the board.
 - 7.2.1 Employees may not use his/her board owned BlackBerry® for personal local and long distance calls unless they have enrolled in the Personal Use Plan. Employees not on the Personal Use Plan are required to reimburse the board for all associated charges.
- 7.3 An employee may choose to use his/her assigned board-owned cell phone or BlackBerry® for personal use; in which case, he/she shall be charged \$20 (including applicable taxes) per month, by way of a non-taxable payroll deduction.
 - 7.3.1 The board may revoke or change this privilege or portions thereof, at any time, without notice.
 - 7.3.2 An employee that is on extended leave, for any reason, shall return the cell phone or BlackBerry, to the board upon request. The personal use plan(s) will be terminated on return of the cell phone or BlackBerry® .
 - 7.3.2.1 If the employee has approval to retain cell phone or BlackBerry® while on an unpaid leave and has opted for the personal use plan, the employee shall reimburse the board \$20 per month for the number of months of the leave along with any additional charges outlined as reimbursable by employee.



- 7.3.3 The employee and authorizer will regularly review the data usage of the cell phone or BlackBerry® . Employees will reimburse the board for any charges identified as exceptions to the board's usage plan.
- 7.3.4 Roaming and extra usage charges are the personal responsibility of the employee unless the expenses are pre-approved for board business. Extra usage charges can include, but are not limited to: Data Roaming (email, internet browsing), directory assistance, incoming & outgoing text messages, subscription based services (text alerts), texting picture video attachments, local and long distance air time charges, carrier based fees for outside of Canada travel.

8. Payment of Invoices

- 8.1 The monthly invoice for all board-owned cell phones and BlackBerry® devices shall be paid by Business Services - Accounting and charged to the departmental code indicated on the completed FORM A2507 - 1.
- 8.2 Each director/superintendent/manager/principal is responsible to ensure that the charges to his/her budget are accurate.
 - 8.2.1 An online detailed statement is available for each board-owned cell phone or BlackBerry® .
 - 8.2.1.1 Authorizers will receive a monthly email notification of the online statement for the cell phones and BlackBerry® devices for which they are responsible. The summary report will identify and flag employees that have exceeded pre-set billing thresholds. Authorizers may click on any cellular user in their business unit to review further details. Authorizers shall ensure that all statements are reviewed and submitted on a monthly basis.
 - 8.2.2 The director/superintendent/manager/principal should:
 - 8.2.2.1 Review the summary page to ensure that the cell phones and BlackBerry® devices charged to the department/location are authorized.
 - 8.2.2.1.1 A Helpdesk ticket shall be created for any corrections or changes.
 - 8.2.3 The employee shall receive a monthly notice when their monthly statement is available on the staff website All personal use expenses are to be identified and reimbursed to the board.
 - 8.2.4 Employees are required to:
 - 8.2.4.1 Review the monthly statement and identify all personal usage (by check box). Zero cost items will not appear on the monthly statement of employees enrolled in the Personal Use Plan.
 - 8.2.4.2 Authorize and submit the statement (for payroll deduction of personal expense)



- 8.2.4.3 Ten month (10) month employees are not required to authorize and submit the statement during the two month of unscheduled regular work. Ten month employees are required to review the two months of statements upon returning to scheduled work

9. Personally-owned Cell Phone or BlackBerry®

- 9.1 Employees who are required to use a cell phone or BlackBerry® for board business may have the option of using their personally-owned cell phone or BlackBerry® rather than a board-owned cell phone or BlackBerry®. Principals' and Vice Principals' use of BlackBerry® technology is mandatory.
- 9.1.1 The board may revoke this privilege at any time, without notice.
- 9.2 An employee who is authorized to use his/her personally-owned cell phone or BlackBerry® shall acknowledge and comply with the following conditions:
- 9.2.1 The employee is responsible for maintaining a cell phone or BlackBerry® in good working order for board business purposes.
- 9.2.2 The board is not responsible for any costs, repairs or maintenance of the employee's cell phone or BlackBerry®
- 9.2.3 An employee may submit an On-Line Expense Claim for cell phone or BlackBerry® related long distance charges, charges related to board business. The employee shall not submit expenses for any monthly plan expenses, features, text messaging, browser fees or data charges (APM A2502 Expense Claims).
- 9.3 An employee who is authorized to use his/her personally-owned BlackBerry® or other Personal Digital Assistant (PDA) may use the device for cell phone purposes only, as outlined throughout this document. A personally-owned BlackBerry® device or other PDA will not be configured on the board's email system for security reasons.

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Issued under the authority of the Director of Education



CELLULAR TELEPHONES AND BLACKBERRY® DEVICES

Employee Name: _____ Employee #: _____

School/Department: _____ Position: _____

Business Unit: _____ Subledger: _____

Approved charges related to the cell phone or BlackBerry® device will be made to this business unit/subledger. Director/superintendents/managers or principals must submit a Helpdesk ticket to initiate requests for both sections 1 and 2 prior to this form being forwarded to Helpdesk.

1. ACTIVATION OF NEW DEVICE

Employee must initial the applicable lines below:

This employee will use a board-owned cell phone or BlackBerry® device for board business. A Helpdesk request has been submitted.

Employee
Initials

Personal Usage Option

This employee chooses to use the board-owned cell phone or BlackBerry® device for personal use.

Option A: The employee is responsible to reimburse the board for all personal charges.

OR

Option B: A monthly non-taxable payroll deduction of \$20.00 (including applicable taxes) will apply. This will relate to charges for unlimited long distance and air time in Canada only,

Employee
Initials

The employee is responsible to reimburse the board for all extra charges not covered under the board plan (as identified in APM A2507) through payroll deduction.

Employee
Initials

2. DEACTIVATION/CHANGE OF DEVICE

Device no longer required and has been returned to the Helpdesk – device plan to be cancelled (Human Resource Services as been notified to discontinue payroll deduction where applicable)

Employee
Initials

Phone Number

OR

Moving location/department but keeping existing device

Employee
Initials

Phone Number

Former business unit

Former subledger

New business unit

New subledger



Employee Acknowledgement:

- The information on this form is correct including the request for payroll deduction (if initialed)
- I will abide by the conditions set out in APM A2507
- I acknowledge receiving a copy of APM 2507 and this (signed) form.

Employee Signature

Date

This form is to be completed and returned to the Helpdesk for processing.