ERSO Documentation Memorandum

The purpose of the ERSO documentation memorandum is to officially record decisions, interpretations or clarifications made at the executive level that will have broad impact on operations within ERSO. Such documentation is to guide future action in order that ERSO operations are consistent across and within teams. Memorandums are assigned an alpha-numeric identifier in sequence based on Key Unit as follows: Executive Office (EO), Human Resources (HR), Payroll (PR), Information Technology (IT), Purchasing Services (PS), Reimbursement Services (RS) and Research Administration (RA).

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<th>Date:</th>
<th>April 24, 2009</th>
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<td>Subject:</td>
<td>Guidelines on the Purchase and Use of Cellular Phones and Other Portable Electronic Resources</td>
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<td>Key Unit:</td>
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<td>Identifier:</td>
<td>PS-1 Purchase and Use of Cellular Phones and Other Portable Electronic Resources</td>
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Discussion:
University Business and Finance Bulletin, G-46, provides guidance on 1) the appropriate circumstances for university purchase of and service support for cellular phones, personal digital assistants (PDAs), pagers, and other electronic communication devices for the use by employees outside of the work place; 2) the use of electronic communication resources and related equipment / software purchased for an employee’s home use, including personal computers, phone lines, fax machines, and connection and access to Internet services and email; 3) establishes the procedures for documenting the use of University-provided cellular phones and reimbursement to the University of any non-incidental personal use of such devices.
http://www.ucop.edu/ucophome/policies/bfb/g46.pdf

Findings:
The University may provide employees with electronic communication resources for use in conducting official university business outside the workplace when there is a significant business reason for doing so. To this end, department head may authorize University purchase of electronic resources only when the primary use of the resource(s) will be for University business. Personal use of the University-provided electronic equipment should be incidental in nature. The employee is responsible for safeguarding the equipment and controlling its use. Any noticeable incremental costs for personal use of a University-provided electronic communication resource must be reimbursed by the employee.

Guidance
Effective immediately, any request for university purchased cellular device or other electronic communication devices for use by an employee must conform to the requirements of this Bulletin. Prior to the purchase of such device or processing of reimbursement and/or direct University billing for the business use of an internet, fax, or similar services outside of the workplace, the employee must review this policy, complete and sign the Employee Agreement Form in Appendix A confirming that the use the service will be primarily for official University business (Form Attached). ERSO Assistant Dean, or his designee, must approve the request by cosigning the Employee Agreement Form prior to processing by Purchasing Services. Requester
should upload the approved Employee Agreement form to ERSO Intranet as the appropriate support documentation. A scanned copy of the approved Employee Agreement Form will be retained on the “S-drive” as ERSO record.
Appendix A

To: DEPARTMENT HEAD

Re: Employee Agreement Concerning the Use of Electronic Communications Resources

I hereby certify that I am the recipient of the following University-provided electronic communications equipment and/or services (check appropriate box):

☐ Equipment - I agree that this equipment is to be used primarily for official University business, and that any personal use of the equipment will be incidental in nature. I agree to reimburse my department for any personal use of this equipment that results in noticeable incremental costs to the University and will exercise appropriate care and caution when using the equipment, in accordance with the policy and procedures set forth in Business and Finance Bulletin G-46, Guidelines for the Purchase and Use of Cellular Phones and Other Portable Electronic Resources (attached). In addition, I understand that all records related to the purchase, use, and disposition of this University-owned equipment, including cell phone statements, are the property of the University and potentially subject to disclosure under the California Public Records Act.

I further understand that I am responsible for safeguarding the equipment, including any data on the equipment, and controlling its use in accordance with BFB G-46. If the University determines that there is no longer a business need for me to possess such equipment, I will return the equipment. Likewise, if I separate from University employment, I will promptly return the equipment to my department.

☐ Services - I agree that this service is to be used primarily for official University business, and that any personal use of the service will be incidental in nature. I agree to reimburse my department for any personal use of this service that results in noticeable incremental costs to the University, in accordance with the policy and procedures set forth in Business and Finance Bulletin G-46. In addition, I understand that all records related to the purchase and use of this University-provided service, are the property of the University and potentially subject to disclosure under the California Public Records Act.

I further understand that if the University determines there is no longer a significant business need for me to utilize this service, the University will discontinue its funding of the service. Likewise, if I separate from University employment, the service will no longer be paid for or reimbursed by the University.

Name: __________________________ Title: __________________________

Signature: ______________________ Date: ______________________

G-46, March 14, 2006; revised March 1, 2007