

**INSTRUCTIONS:** This is the **Cellular Communications Request Form** to request a stipend or a Metro issued phone. Do read through the policy! Then complete the form at the end, if you agree. After getting the needed approvals, scan and email the completed form to the Help Desk.

*-Updated Instructions April 2016*

## **Mobile Communications - Personnel Policies and Procedures**

Subject: Mobile Communication  
Section: Information Services

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### **POLICY:**

It is the policy of Metro to provide mobile communication devices, paging devices, mobile service and /or wireless personal communication devices to designated employees in order to improve productivity, enhance service to our customers and stakeholders, and to ensure personal and public safety.

Mobile services use on devices supplied by Metro is restricted to Metro business. Personal cellular calls (outgoing or incoming) will only be allowed in limited and infrequent instances of family emergencies, if these calls cannot be made from a land line phone in a reasonable period of time. These calls should be of short duration. No other personal use is allowed. The above emergency calls do not need to be reimbursed. Employees may alternately request from their Center/Service director to buy a wireless personal digital assistant (PDA) PDA instead of a cellular phone.

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### **Applicable To:**

All Employees

### **Not Applicable To:**

N/A

### **DEFINITIONS:**

Cellular phone: For the purposes of this policy cellular phone is used in a broad sense and will include smart phones e.g. BlackBerry, Windows Mobile Device, etc.

### **GUIDELINES:**

#### **I. CELLULAR PHONE USE:**

Metro's policy is taken directly from the Oregon Government Standards and practices commission (OGSPC) Advisory Opinion 01A-1004:

- A. Regardless if there are additional charges for long distance calls or not on Metro's cellular phone plan, an employee may not use cellular phones for personal long distance calls. If the employee used this service, the employee would be receiving a financial gain or avoiding a financial detriment and would be in violation of ORS 244.040(1) (a).

Adopted: February 2009

Cellular Phone Policy

- B. If an employee has only a Metro issued cellular telephones only and not a regular desk telephone, the employee may use the cellular telephone to talk to family members, make medical appointments, schedule service technicians, confer with a child's school and take care of any of a variety of other matters which can only be accomplished during regular working hours without such usage being prohibited by law. In this situation, it would be less disruptive to permit employees to make such personal calls from the cellular telephones than to require an employee to take a break or leave from work to take care of personal matters. These calls should be of short duration.

## II. MOBILE DEVICE USE:

### A. GENERAL:

Cellular phones are a tool to enhance employee productivity and provide a higher level of service to our customers. Cellular phone service is also more expensive than landline phones because of the airtime costs associated with cellular phone usage. Therefore, the following guidelines will apply.

- i. Do not use your cellular phone to make a call if regular phone service is available.
- ii. Avoid lengthy conversations on cellular phones. If you anticipate a call lasting more than a few minutes try and arrange to call the person back from a regular phone.
- iii. Minimize use of your cellular phone outside the home service area. Roaming charges add significantly to the cost of cellular phone calls.
- iv. Minimize the number of long-distance calls made on your cellular phone. Again, long distance calls on a cellular phone add to the expense of an already more expensive means of phone service.
- v. Cellular phones used for Metro business will be subject to Oregon's public records laws. Employees using personal cellular phones under this policy should use their best efforts to separate personal information from Metro business records on their personal phones.

### B. IN VEHICLES:

Due to the highly distractive nature of cell phone use while driving, Metro does not condone the use the use of mobile devices while driving (this includes all uses, texting, talking, scrolling, etc.) except designated enforcement personnel. It is important both for safety and for the image of Metro drivers that common sense and courtesy be followed in using mobile devices.

Use the following guidelines for cell phone use while driving:

- i. Wait to use your cellular phone when parked, or have a passenger use the phone.
- ii. If your phone rings when you are driving, especially during hazardous conditions, let your cellular voice mail service take the call and listen to the message later when you are parked, or pull over before answering, if traffic conditions permit.
- iii. Place your calls before you begin your trip.
- iv. Do not take notes or look up phone numbers while driving. As a driver, your first responsibility is to pay attention to the road.
- v. Do not use email or texting functions while driving. Wait until you are parked.

### C. WORK SITES:

DO NOT engage in the use of mobile devices while at any work site during which the operation of a mobile device will be a distraction to the user and/or may create an unsafe work environment. Such work sites include but are not limited to: Road repair, maintenance and construction, operating or repairing energized equipment such as electrical panels, motors or energized circuits. Such work sites must be secured or the mobile device used only by an employee while out of harm's way of such work environments.

### D. OFF-ROAD EQUIPMENT:

DO NOT engage in the use of a mobile devices while operating a moving motorized off-road (maintenance/construction type) equipment. Even a hands-free cellular phone will not be authorized while operating this type of equipment, unless the equipment has been properly stopped and taken out of gear or turned off.

### E. EMERGENCIES:

You can and should use your cellular phone to call for help or to help others in emergencies such as an auto accident or if witnessing a crime in progress or other emergencies where there are serious safety concerns. Employees are not expected to offer additional assistance beyond calling for help. Please keep cell phones turned off or use the 'keypad lock function' to avoid misdials. Any button on the keypad that is depressed for longer than 15 seconds will call 9-1-1.

Services/Centers may have procedures that are more limiting than Metro's cellular telephone use policy, but Service/Center procedures must at a minimum comply with this policy.

## **PROCEDURES:**

### I. OBTAINING A MOBILE DEVICE:

Service/Center directors may authorize the issuance of a cell phone to an employee. In determining who should be provided a Metro cell phone, the following should be taken into consideration. The availability of a land line phone, amount of time employee spends in the field versus in an office setting, the nature and type of emergency the employee needs to respond to, is there an alternative method of communication readily available to the employee, is another employee generally present who has a cell phone issued to him/her.

Please contact Information Services for equipment standards, capability advice and authorization forms. For equipment that allows for data connection to the Metro network for such applications as email or file transfers, all connections, usage, storage and

securing of data must be in accordance with the applicable information security and records and information services policy and practice.

- a. Lost or damaged phones should be reported to Information Services immediately. Replacements may take a minimum of 48 hours to replace.

## II. PERSONAL MOBILE COMMUNICATIONS ALLOWANCE PROVIDED AS AN EMPLOYEMENT BENEFIT:

- a. Metro recognizes that due to the nature of some positions, certain employees will have a mobile communications allowance provided rather than an actual cell phone. Metro Service/Center directors may designate employees who will receive a specified amount of additional taxable income per month for the specific purpose of obtaining a personal cell phone. This amount will be determined depending on expected usage: The amount of benefit will be assigned based upon one of three increments. The first increment will be \$20.00 and the second increment will be \$30.00 and the third increment will be \$50.00, depending on whether phone only, data only, or phone and data services are required. This amount may be adjusted periodically by Metro. This mobile communications allowance would be used for business, but phone it is applied to would not have the same restrictions on personal use since it is a personal phone.
- b. Personally-owned mobile devices, such as a Blackberry, smart phone or wireless PDA, will be minimally supported by Information Services. Since the device may not comply with Information Services standards, connectivity and functionality cannot be assured.

## III. REQUESTING A CELLULAR DEVICE

- a. For existing/new users that wish a New/upgrade or replacement:

Employee's supervisor is required to send an email to Information Services (IS) requesting the new/upgrade and why. An approval form is sent electronically to the Service/Center Director. An order request is then sent to Metro's Verizon representative to fulfill the order. No user is to request their own phone. The request/approval comes from the supervisor and director, or no phone.

1. Once the phone is received:

Information Services notifies the user and sets up a time to receive the phone. The user comes to the IS front desk, (A supervisor can retrieve the phone, but will still need the user to sign for the phone and the paper with the signature is returned to IS and copied to HR.) The phone is activated and employee is advised of phone use and policies.

2. If the contacts need to be transferred:

The user retains the old phone, takes it to a Verizon store, transfers the contacts and returns the old phone to IS. If there are no contacts to be transferred, the phone is returned to IS before receiving the new phone.

3. Accessories:

Accessories are not purchased by Information Services. Any accessories needed for the phone must be purchased through the Service/Center's purchasing coordinator by way of an approval

by their supervisor. Users are not permitted to add additional services (such as GPS) to their mobile devices.

4. If there is an issue with the phone:

Contact Information Services

5. Invoices:

All invoices are received by Information Services. Invoices are set up for coding and review by the employee and their supervisor. Once the invoice is approved, it is forwarded to accounting for processing.

## **RESPONSIBILITIES**

### Employee

1. Maintain control of the mobile phone device and ensure the phone is either on their person or locked in a car or in desk out of site.
2. When not in use for a period of time, place the phone in lock mode to avoid unauthorized use.
3. In the event the cellular phone is lost, damaged, stolen or has been used without authorization, the employee must notify the supervisor and Information Services (IS) within the same business day of becoming aware of the situation.
4. Follow all procedures and regulations on cell phones outlined in this policy.
5. Return the cell phone or PDA to IS if no longer being used for Metro business or when leaving Metro employment.

### Supervisor

1. Determine which employees have a business need for a cellular phone or PDA.
2. Notify IS of the need to obtain proper authorization and cell phone or PDA for an employee.
3. Review and approve as appropriate cellular phone and cellular phone allowance requests based on business need for the device. Monitor, and retrieve cellular phones and smart phones. Return retrieved phones to IS before reissuing to another employee.
4. Review monthly usage statements.

### Service/Center Director

1. Review and approve as appropriate cellular phone and cellular phone allowance requests based on business need for the device.

### IT

1. Maintain administration and oversight of the use and distribution of Metro issued cellular phones and PDA.
2. Issue cellular phones and smart phones.

### HR

1. Maintain employee cellular telephone use agreements in the employee's personnel file.

## **NONCOMPLIANCE AND MISUSE OF MOBILE DEVICES:**

- I. Mobile devices provided by Metro are the property of Metro. Abuse of Metro mobile devices will result in revocation of the device and appropriate disciplinary action, which may include termination. Policy violations include, but are not limited to:
  - a. Use of Metro mobile devices for personal calls, beyond acceptable emergency use.
  - b. Failure to return the mobile device when reassigned, terminated, or upon request.
  - c. Improper use of Metro mobile devices in vehicles, at work sites, or while operating equipment.

### **References:**

Oregon ethics law, Oregon revised statutes 244.010-244.045, in relevant part:

Oregon government standards and practices commission, technology advisory opinion 7/9/98:

Oregon government standards and practices commission advisory opinion 01a-1004, 6/1/01

Oregon government standards and practices commission advisory opinion 02a-1012.11/12/02:

Employees complying with metro cell phone policy will not violate Government Standards and Practices law.

<http://www.irs.gov/govt/fslg/article/0,,id=167154,00.html>

IRS regulations indicate that if the employer does not have a policy requiring employees to keep records, or the employee does not keep records, the value of the use of the phone will be income to the employee.

### **Attachments:**

Cellular Telephone Use Agreement

Cellular Telephone Request Form

**Cellular Telephone Use Agreement**  
**Metro – owned phones**

**I have read the entire Mobile Communication Policy. I understand and agree to the terms discussed within the policy. In summary:**

1. Cellular communication devices are provided for Metro business purposes only.
2. Employees shall not use Metro cell phones or smart phones for personal calls except in emergencies, such as unforeseen child care issues, or informing someone about an unexpected change in schedule due to demands of the job. However these calls should be limited, infrequent and of short duration. Whenever possible make these calls from a land line phone. Emergencies are the only situations where personal use is considered acceptable. No other personal use is allowed, even if reimbursed.
3. Employees are responsible for safe use of cellular equipment. As such, employees should not use cellular equipment while driving unless using voice activated dialing, blue tooth or other hands free devices.
4. Cellular phones should not be used while performing safety sensitive functions including operating heavy equipment.
5. Employees are responsible to immediately notify their supervisor if the phone is lost, stolen or rendered useless due to damage. Metro is not responsible for replacing cell phones damaged by employee carelessness.
6. Cell phones and smart phone usage statements are subject to Metro audit and are considered public records subject to release upon appropriate request.

Additional guidelines for employee use:

1. Do not use your cellular phone to make a call if land line phone service is available. There is no charge for a local call made from a regular phone while local calls made or received on a cellular phone incur charges.
2. Avoid lengthy conversations on cellular phones. If you anticipate a call lasting more than a few minutes, try and arrange to call the person back from a regular phone.
3. Minimize calls placed to another Metro cellular phone. Metro incurs costs for out-going and in-coming cellular phone calls. Calls to another Metro cellular phone result in twice the expense to Metro.
4. Minimize use of your cellular phone outside the home service area. Roaming charges add significantly to the cost of cellular phone calls.
5. Minimize the number of long distance calls made on your cellular phone. Again, long distance calls on a cellular phone add to the expense of an already more expensive means of phone service.

\_\_\_\_\_  
Employee Name Printed

\_\_\_\_\_  
Department

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

Adopted: February 2009

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**Cellular Communications Request Form**

First Name	Last Name	Current Cell Number (if applicable)
Department	Location	Title
Justification (ex. Need to send receive email in the field)		
Type of service needed (ex. voice only, voice/data)		
<b>You will be charged a recurring monthly charge of approximately \$50/month plus taxes and fees for Verizon Service</b>		
	Type/Model of device	Price (prices may vary)
	Basic Phone voice/text only (no data)	\$0-50
	Samsung Galaxy – older model	\$0-100
	Samsung Galaxy – newer model	\$99 - 250
	iPhone – older model	\$99 – 150
	iPhone – newer model	\$199 – 250
	Other: Please specify under Type of service needed above	
	Stipend (indicate amount)	\$20.00 – Voice Only \$30.00 – Data Only \$50.00 – Voice and Data

Optional Accessories (Check all that apply)

- Basic to Ruggedized Cases: \$14.99 to \$39.99     Car charger: \$14.99  
 (Prices are approximate and subject to change.)     Extra travel/wall charger: \$22.50 - \$29.99

**How to Order**

**Email completed and approved form (pages 7 & 8 only) to the Help Desk** ([helpdesk@oregonmetro.gov](mailto:helpdesk@oregonmetro.gov))

**Cellular Device Policy**

I have read the cellular device policy and have read and understand my responsibilities.

Recipient's Signature	Date Received
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**Billing Information**

Account Coding	Name (please print) of Manager responsible for monthly charges
Finance Manager Review	

**Director Approval** - Directors are responsible for approving cellular devices and stipends.

Name (Print)	Signature	Date Approved:
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