



COUNTY OF EL DORADO, CALIFORNIA  
BOARD OF SUPERVISORS POLICY

<b>Subject:</b> <b>CELLULAR TELEPHONE/WIRELESS PDA'S</b> <b>(SMARTPHONES) POLICY</b>	<b>Policy Number</b> A-20	<b>Page Number:</b> Page 1 of 8
	<b>Date Adopted:</b> 11/6/2007	<b>Revised Date:</b> 6/17/2008 retroactive to 3/25/2008

**PURPOSE:**

This policy is intended to provide uniform and consistent standards for the application of cellular telephones, including devices often referred to as Smartphones (PDA's), to County business needs and to define the responsibilities for the costs of cellular telephone service.

***Scope***

These guidelines apply to all County departments, officers and employees. Sworn non-management officers from the Sheriff, Human Services and Probation departments will follow this policy pertaining to County-Owned Cellular Telephones only.

**BACKGROUND:**

A cellular telephone or mobile telephone is a long-range, portable electronic device for personal telecommunications. In addition to the standard voice function of a telephone, current mobile telephones can support many additional services such as Short Message Service (SMS) for text messaging, email, packet switching for access to the Internet, and Multimedia Message Service (MMS) for sending and receiving photos and video. Most current cellular telephones connect to a cellular network of base stations (cell sites), which is in turn interconnected to the public switched telephone network (PSTN).

Cellular telephones are distinct from cordless telephones, which generally operate only within a limited range of a specific base station. Technically, the term mobile telephone includes such devices as satellite telephones and pre-cellular mobile telephones such as those operating via



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Mobile Telephone Service (MTS) which do not have a cellular network, whereas the related term cell(ular) telephones does not. In practice, the two terms are used nearly interchangeably. Monthly charges vary but typically consist of a fixed access charge, air time charges, and data charges.

A Smartphone is any electronic handheld device that integrates the functionality of a cellular telephone and that of a personal digital assistant (PDA) or other information appliance. This is often achieved by adding telephone function to an existing PDA or putting PDA functionality into a cellular telephone. "Smart" functionality typically includes a miniature keyboard and/or a touch screen. Smartphone features may include Internet access, email access, scheduling software, contact management, and the ability to read business documents in a variety of formats such as Adobe PDF and Microsoft Office. Connectivity to these features is provided using two different methods - wireless, which requires a data plan to be purchased from a cellular carrier and wired which provides a direct connection between the cellular telephone and a personal computer. Both methods require the purchase of additional software. This software is used to synchronize the cellular telephone with data such as email and calendars.

POLICY:

1. **Accountability for Cellular Telephone Usage**

Under current Governmental regulations, all personal use of County-owned or provided cellular telephones must be treated as taxable income. In addition, any reimbursement for the use of a personal cellular telephone must also be treated as taxable income.



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Therefore, three approaches for the use and payment of cellular telephones and related costs are authorized.

- A. County-Owned Phones: If the cellular telephone is used for 100% County-business, absolutely no personal use (with the exception of life safety situations), including all incoming and outgoing calls and/or data usage, then the telephone should be purchased, maintained, and supported through direct billing to the department where the telephone is used.
  
- B. Personal Cellular Phones: If the cellular telephone is used for a mix of County-business and personal use, the user may request department head and Chief Administrative Officer approval for a taxable allowance which will be used to offset the costs incurred by the owner of the cellular telephone. Under this arrangement the individual owner of the cellular telephone is responsible for all costs incurred.
  
- C. Incidental Use of Personal Cellular Phones: Employees who are required to use their personal cellular telephone for unplanned County business, a per-minute payment is also authorized.

Each department head operating under the authority of this policy will have the responsibility to maintain accountability over cellular telephone usage. Departments must establish adequate internal controls to ensure employees are following cellular telephone policies.



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Auditor's Office may review departmental policies and compliance with the Policy on Cellular Telephones.

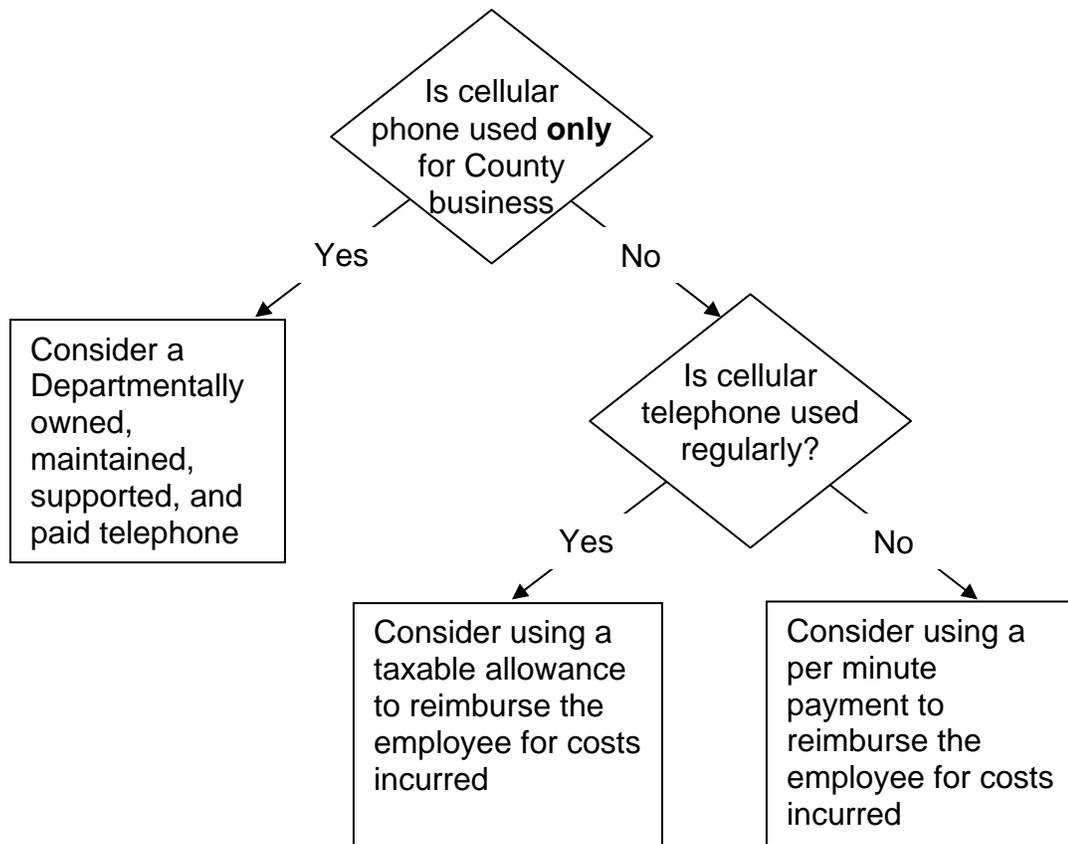
Specifically, departmental policies should include, but not be limited to, the following:

- For County owned phones, monthly review and approval of supported cellular telephone usage and bills;
- For privately owned phones, verify annually that the employee has a valid contract in effect;
- Maintenance of a current listing of all active cellular telephone accounts;
- Periodic review of supported cellular telephone usage to eliminate payment for unnecessary cellular telephones and ensure cost effective rate plans are employed.
- Periodic review of County-paid allowance to ensure appropriate level of payment.



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2. **Support**

County cellular telephone service, including installation, maintenance, and support is provided by two local carriers, Verizon and AT&T. Individual employees can also obtain County-employee discounts from these carriers.

The Information Technologies Department (I.T.) will only support connectivity to the County's email and calendaring infrastructure using approved, standardized software. For



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more information contact I.T. (x5696). I.T. requires that departments and individuals only buy Smartphones that have been I.T. certified for compatibility with the existing infrastructure. To aid in the selection of a Smartphone, I.T. will annually publish a list of Smartphones that have been tested and shown to be compatible.

3. **Cellular Telephone Justification**

A. County-Owned Phones: Requests for County-owned cellular telephones must demonstrate that the frequent emergency response and/or job safety are dependent upon the use of a cellular telephone. Typically a County-owned cellular telephone is one that is assigned to a specific work location, a work vehicle, or a telephone pool that is available to many employees and is not assigned for one individual's use. As mentioned, County-owned cellular telephones should only be used in circumstances where the usage is dedicated to County business.

B. Personal Cellular Phone:

**Guidelines:** The Cellular phone and PDA allowance is intended to cover the costs of personal cellular phone and PDA expenses related to work duties. This plan complies with the Internal Revenue Service's directives regarding the taxability of cell phone usage and service allowances. Initial purchase of the cellular phone and/or PDA, accessory equipment, and activation fees will be the responsibility of the employee. The employee shall pay any costs exceeding the amount of the cellular phone and/or PDA allowance. The allowances are not intended to compensate the official dollar-for-dollar for the cell phone service cost.



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Requests for an allowance to offset the costs of using a personally-owned cellular telephone must be approved by the department head. Employees receiving an allowance are solely responsible for the payment of any and all costs related to the monthly usage, purchase, maintenance, support, and replacement of their cellular telephone. No allowance will be paid when an employee is in an unpaid leave status.

**Taxability:** The cellular phone and/or PDA allowance will be paid through the County payroll system as taxable income. For determination of individual taxability, employees should check with their tax advisor.

**Allowance Plan:** Cellular phone allowance: For eligible designated employees using personal cellular phones, there shall be a three-tier reimbursement plan to be calculated per pay period:

- a. Tier C1 allowance – \$30 per month based upon work duties that require incidental business use of a cell phone.
- b. Tier C2 allowance – \$40 per month based upon work duties that require more than incidental business use of a cell phone.
- c. Tier C3 allowance – \$60 per month for those whose work duties require that they be frequently out of the office and conduct County business throughout the day from remote locations.



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Tier Rates will be reviewed every two years during budget preparation and be based on the average cost of Verizon and AT&T by functionality.

- C. Incidental Use: Employees who are required to use their personal cellular telephone for unplanned County business may request reimbursement. As with employees who receive an allowance, Incidental Users are solely responsible for the payment of any and all costs related to the monthly usage, purchase, maintenance, support, and replacement of their cellular telephone. Employees seeking reimbursement shall submit an expense report and attach copy of their cellular telephone bill showing the County business related calls. Incidental Use will be reimbursed at the rate of \$0.05 per minute.
- D. PDA (Smartphone) Allowance: For designated employees and elected officials using a personal wireless PDA device that requires data access for email, calendaring, documents, essential department systems, etc., the allowance shall be \$40.00 per month, in addition to telephone allowances above.

**Primary Department:** Information Technologies  
Chief Administrative Office

**References:** Agenda Item 07-1682  
A-20 Cellular Telephone Procedures Document and applicable forms

## COUNTY ADMINISTRATIVE PROCEDURES

Subject: Cellular Telephone/Wireless  
PDA's (Smartphones) Procedures

No.: A-20

Date: 03/26/08

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Reference: Board Policy A-20

Introduction:

The Board of Supervisors Policy A-20 provides uniform and consistent standards for the application of cellular telephones, including devices often referred to as Smartphones (PDA's), to County business needs and to define the responsibilities of the costs of cellular telephone service.

The following procedures and forms are required to be read, completed and signed by each employee as defined in the Scope statement of Policy A-20 in departments who are requesting cellular telephones or PDAs. The forms are then approved by the department head and if required forwarded to the Chief Administrative Office and an updated PPF for the employee is generated and sent to Human Resources as outlined. The original forms are retained in the employee's departmental personnel file.

Procedure:

- A. Department heads shall determine which employees in their department shall receive cellular telephone and/or wireless PDA privileges as provided in above referenced policy. The user or manager will fill out the Cellular Telephone Justification Questionnaire and submit to the department head.
- B. Upon approval of a department head, an employee may be authorized to receive County cellular telephone/PDA service for work-related needs. Some of those work-related needs include, but are not limited to:
  - Providing safety of self or others who may be at risk.
  - Providing immediate communication with staff in the department and other agencies as required to coordinate programs or provide customer service.
  - Dealing with schedule changes.
  - Retrieving messages from voice mail while working outside of one's main workplace.
  - Making telephone calls to clients and customers.
  - Dealing with personal emergencies, including unexpected illness, car trouble, inclement weather, etc., for oneself or others while working outside of one's main workplace.
  - Providing communications access for an employee whose main work locations in the field where land lines and other primary radio/telephone communications are not available.
- C. Assignment: A department head who determines that an employee has need of a cellular telephone/PDA for work-related purposes will request the user to submit the Cellular Telephone Approval Form to the department head for authorization and signature along with a signed Cellular Telephone Policy Acknowledgement Form (Allowance or County-Owned). Department heads and elected officials shall submit and sign their own Approval and Acknowledgement forms.

Upon approval, the department will then generate a new PPF for the employee indicating the approved allowance in the "Comments" area of the PPF. After the department head and employee have signed the new PPF it will be forwarded to Human Resources to be processed. The original Cellular Telephone Justification Questionnaire, Cellular Telephone Policy Acknowledgement (County-Owned or Allowance), and Cellular Telephone Approval and if device will be a cellular telephone/PDA allowance a copy of the employee's valid cellular telephone/PDA contract/service agreement will be retained in the employee's departmental personnel file.

- D. Allowance Change: To change a cellular telephone/PDA allowance, the employee would complete a new Cellular Telephone Approval form using the Change of Service check box. The completed form along with a copy of the new cellular telephone/PDA contract/service agreement will be kept in the employee's departmental personnel file. The department will then generate a new PPF for the employee indicating the new allowance in the "Comments" area of the PPF. After the department head and the employee have signed the new PPF it will be forwarded to Human Resources to be processed.
- E. Cancellation: To cancel a cellular telephone/PDA allowance, the employee would complete a new Cellular Telephone Approval form using the Cancellation check box. The completed form will be kept in the employee's departmental personnel file. The department will then generate a new PPF for the employee indicating the cellular telephone/PDA allowance has been cancelled in the "Comments" area of the PPF. After the department head and the employee have signed the new PPF it will be forwarded to Human Resources to be processed.
- F. Replacement: Replacement or repair of the cellular telephone or PDA will normally be the responsibility of the employee who uses the cellular telephone/PDA. If the cellular telephone or PDA is lost or damaged as a direct result of County business use, the department head or designee may approve reimbursement to the employee. In the case of department heads and elected officials, the CAO may approve reimbursement.

#### Usage Guidelines:

All users are expected to abide by the following usage guidelines:

- A. Review calling patterns to ensure that the current service plan meets user needs.
- B. Protect user's cellular telephone and wireless PDA's from loss, theft or damage. Report loss or theft incidents of wireless PDA's to I.T. as soon as possible for security reasons.
- C. PDA users are subject to I.T. Computer and Network Resource Usage Policies and Standards Guide enforcement management to protect the County's security, integrity and availability of the communications network.
- D. PDA users must synchronize their Lotus Notes email using the Intellisync software, with the exception of the Sheriff's office that will synchronize their Blackberries to GroupWise. This allows for better security and remote disabling should the device be stolen.

#### Transfer of Service of County-Owned Cell Telephones and/or Wireless PDA's (Smartphones):

Upon adoption of this policy, any employee, who has possession of a County-owned cellular telephone and/or PDA with an activated cellular telephone service component is authorized by the to participate in the allowance plan as provided by this policy, may simultaneously accept both the ownership of the cellular telephone and/or PDA and transfer of the service agreement if applicable and available for that cellular telephone and/or PDA from the County to himself or herself. The conditions as prescribed in Policy A-20, Section 3.B shall apply, except that the user must also comply with any I.T. directives concerning the PDA's connection to the County's server.

An employee who chooses to take ownership of the County-owned cellular telephone and/or PDA with an activated cellular telephone service component assigned to him or her must complete and submit the Cellular Telephone Approval form to the department head for approval.

The transfer of ownership and service for a formerly County-owned cellular telephone and/or PDA is subject to the following:

- The user may continue service at the level currently applicable and available by the cellular telephone provider of the cellular telephone or may change or upgrade the service by contacting the service provider; however, the allowance to be paid shall not exceed the amount authorized by Policy A-20, Section 3.B, Allowance Plan.

The service agreement or monthly statement and the acknowledgement forms will be kept in the employee's departmental personnel file.

Issuing Department:

Approval/Concurrence by  
Chief Administrative Officer:

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(Signature and Date)

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(Signature and Date)

## Cellular Telephone Justification Questionnaire

1. Which type of cellular telephone service is being requested?
  - County-Owned
  - Allowance – Occasional Cellular Telephone User – Tier C1
  - Allowance – Frequent Cellular Telephone User – Tier C2
  - Allowance – Frequent Cellular Telephone User, out of office, Remote locations – Tier C3
  - Allowance – Smartphone with Data
  - No Allowance – Connecting to County Infrastructure (only requires Department Head approval)
2. Explain why you are requesting a County-owned cellular telephone or allowance for a cellular telephone. Will emergency response or employee safety be enhanced with a County-owned cellular telephone or allowance? Please explain.
3. Describe the present system of communication and why an allowance for the use of a cellular telephone is necessary.
4. What is the average number of hours per day that your work requires you to be accessible by cellular telephone?
5. If requesting a County-owned cellular telephone, in which areas of the County will the cellular telephone be used?
6. Explain why cellular telephone usage is a necessity, rather than a convenience, for the performance of your job?
7. How many cellular telephone minutes a month do you expect will be used for County business?
8. Can the benefits of a cellular telephone or allowance be quantified? If so, please show your calculations on an attachment.
9. Other.

## Cellular Telephone Policy Acknowledgement – County-Owned

I acknowledge receipt of this policy and understand and agree that I am bound by its contents:

1. \_\_\_\_\_ (hereinafter referred to as “the user”) is being granted access to a County-owned cellular telephone or PDA.
2. The user has read and understands the County’s Cellular Telephone Policy.
3. The user understands and agrees that the County-owned cellular telephone/PDA will be used 100% for County business and is not for personal use.

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Employee Name

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Signature

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Work Phone

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Department

## Cellular Telephone Policy Acknowledgement – Allowance

I acknowledge receipt of this policy and understand and agree that I am bound by its contents:

1. \_\_\_\_\_ (hereinafter referred to as “the owner”) has chosen to purchase with own funds a personal cellular telephone or PDA.
2. The owner acknowledges that the allowance amounts received are taxable income.
3. Owner states that said cellular telephone or PDA complies with El Dorado County Cellular Telephone Policy.
4. The owner has read and understands the County’s Cellular Telephone Policy.
5. If the owner has requested that this cellular telephone or PDA be allowed to synchronize with County Assets, the owner therefore agrees hereby to the following:
  - a. The owner has read and understands the El Dorado County Network and Resource Usage Policies and Guidelines for General Use.
  - b. The owner will not cause any programming to block the County’s management software from configuring personal cellular telephones/PDAs to comply with El Dorado County Network and Resource Usage Policies and Guidelines for General Use.
  - c. The owner will follow all policies as noted in the Computer and Network Resource Usage Policies and Standards Guide – General Usage, Section 1.13 Portable Computing Devices.
  - d. Any add-on software must be licensed and copies of said licenses be kept available for County IT staff inspection and auditing.
  - e. A copy of the current cellular contract/service agreement to be kept in the employee’s departmental personnel file.
6. Replacement or repair of the cellular telephone or PDA will normally be the responsibility of the employee who uses the cellular telephone/PDA. If the cellular telephone or PDA is lost or damaged as a direct result of County business use, the department head or designee, may approve reimbursement to the employee. In the case of department heads and elected officials, the CAO may approve reimbursement.
7. The owner understands and agrees that, during emergencies, the County may utilize the cellular telephone or PDA upon request. The owner will provide their cellular telephone number to their direct management who will have discretion over how it is shared with other County employees.
8. Any violation of this agreement by the owner may be cause for immediate disallowing of further allowance and synchronization with or connection to County equipment.
9. The owner receiving an allowance is solely responsible for the payment of any and all costs related to the monthly usage, purchase, maintenance, support, and replacement of their cellular telephone or PDA. The owner is not entitled to County-paid monthly bills or per minute reimbursement.
10. The owner understands that government rate discounts will terminate when employee leaves County employment.

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Work Phone

\_\_\_\_\_  
Department

Cellular Telephone Number: \_\_\_\_\_

