From: Silverman, Celestine

SRBA-CENTRALADMIN-L@LISTS.UPENN.EDU; SRBA-SCHOOLCENTER-L@LISTS.UPENN.EDU To:

Subject: Presentations and recording Date: Friday, May 31, 2024 4:16:00 PM

Attachments: image001.png

image002.png

Mobile Device Guidelines - Sr. BA 05.29.24 (no notes).pptx

image003.png

SENIOR BA MEETING Agenda.docx Sr. BA Closing 4.29.2024 with notes.pptx

Good afternoon,

Attached are the presentations and agenda from Wednesday's Senior BA meeting. I am also including the link below to the recording of the meeting in case you missed it and would like to watch,

Remember you can always go to our **Senior BA Website** to find any past presentations as well as any announcements/correspondence we have sent to the group. To find past meeting recordings, just scroll down your TEAMS chat stream and look for the meeting you are interested in and click on the recording.

Senior BA Meeting (4thQ FY24)-20240529 181640-Meeting Recording.mp4

Thanks, and have a great weekend.

Celestine Silverman, PACE, CEAP - Certified Administrative Professional

Business Administrator

Office of the Comptroller University of Pennsylvania 3451 Walnut Street | 312 Franklin Building Philadelphia, PA 19104 215-898-7593 (office) | 610-608-7206 (cell) celes@upenn.edu





SENIOR BA MEETING Wednesday, May 29, 2024 1:30pm – TEAMS

1:35pm – 1:55pm	Year-End School Closing Information
	Shane Pyle & Sary Rosado – Financial Reporting
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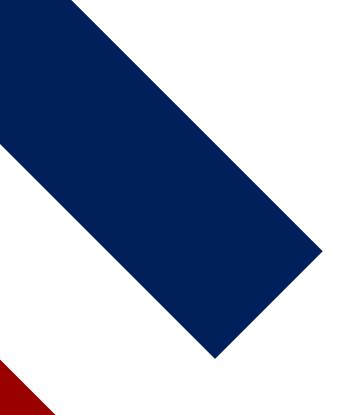
1:55pm-2:05pm Mobile Device Guidelines
Kate Carangi, Corporate Tax, Compliance & Payroll

2:05pm – 2:20pm Procurement Transformation
Mark Mills – Procurement Services

Welcome

1:30pm-1:35pm





Mobile Device Guidelines

Kate Carangi

Senior BA Meeting May 29, 2024



Policy Changes

- Policy #2328 Payments for or Reimbursements of Costs Associated with Telephones other than Cellular Telephone – now defunct
- Policy #2329 Payments for or Reimbursements of Costs Associated with Cellular Telephone – renamed "Mobile Device Guidelines"



Overview

- Realign policies to current technology within IRS guidelines
- Provide a minimum standard for mobile devices
 - Schools and centers can implement more stringent policies
- Two options:
 - University provides a mobile device
 - University gives an allowance for personal cellular service plan



Devices Provided by Penn

written justification of business reason

Business Administrator

written approval from Dean or VP



Devices Provided by Penn

- Not taxable to employee if there is a substantial business reason
- Taxable to the employee if no substantial business reason
 - Report to Payroll Office for imputed income purposes
- Cannot use grant funds



Allowance for Personal Cellular Service Plan

department decides on a reasonable dollar amount

department receives preapproval from Human Resources

process through Workday (Allowance Plan – Communication Device)



Allowance for Personal Cellular Service Plan

- The allowance is taxable and gets reported on the employee's W-2
- Employee is responsible for payments to the provider



Final Points

- IRS Guidelines
- Schools and centers should review device and allowance recipients annually