

**TO:** ALL COUNTY PERSONNEL

**FROM:** ROBERT WEISMAN  
COUNTY ADMINISTRATOR

**PREPARED BY:** INFORMATION SYSTEMS SERVICES (ISS) DEPARTMENT

**SUBJECT:** COUNTY-SUPPLIED LANDLINE COMMUNICATIONS – VOICE  
TRANSMISSION

**PPM#:** CW-O-066

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**ISSUE DATE**  
February 1, 2014

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**EFFECTIVE DATE**  
February 1, 2014

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**PURPOSE:**

To establish processes and identify responsibilities for the assignment, acquisition, disposition, use and bill management of commercially contracted and County-owned landline communication systems and services for voice transmission.

**UPDATES:**

Future updates of PPM # CW-O-066 will be the responsibility of the Director of Information Systems Services (ISS).

**AUTHORITY:**

- Florida Public Records Law (Chapter 119, Florida Statutes)
- Palm Beach County Code, Chapter 2, Article III, Division 2, Part A, Section 2-52
- Purchasing Policy and Procedures (Countywide PPM # CW-L-008)
- Information Technology Governance Policies (Countywide PPM # CW-O-079)

**SCOPE:**

Landline communication systems covered under this PPM include: 1) local private lines; 2) County-owned private branch exchanges (PBXs); 3) vendor-provided business switching services (Centrex); and 4) Voice over Internet Protocol (VoIP) networks, including all telephone instruments, circuits, related service plans, and accessories.

Landline services covered under this PPM include local service and associated calling features, long distance, directory assistance, White Page Directory listing, and Yellow Pages advertising.

## **DEFINITIONS:**

*(Refer to **Exhibit A** for a listing of definitions related to this PPM.)*

## **BACKGROUND**

Most of the County's commercially provided landline telecommunication services are provided by AT&T. Although the telecom services themselves are relatively straightforward, the monthly landline telephone bill from AT&T is extremely detailed and complex, uses unfamiliar terminology to identify services (e.g., Class of Service and USOC codes), and includes both voice and data transmission components. This complexity has been further exacerbated by the consolidation within ISS of payments for landline services with subsequent charge-backs to departments. Because of this situation, the monthly bill review process has been very challenging for both ISS and County staff, particularly with regard to ensuring the accuracy and appropriateness of specific charges appearing on the monthly bill and the timeliness of requested service changes, particularly service disconnects.

In order to address this situation, the County has purchased a telecom usage and call management system which provides telecommunications management reports and call records by employee, by Department and on a countywide basis over the County's Intranet. In addition to information on landline charges for voice transmission, this system also provides information on landline charges for data transmission and wireless communication charges for County-supplied cell phones, smartphones and air cards. The County will also be using bill management software provided by AT&T to analyze and inventory AT&T telecom expenses.

## **POLICY:**

County-supplied landline telephones and related services are essential to conducting County-related business, and are provided primarily for business use. Reasonable personal use of landline telephones and services may be permitted in accordance with the provisions of this PPM except that non-business long distance calls are prohibited except in the case of extraordinary circumstances (e.g., family emergency). It is the caller's responsibility to self-declare any non-business related calls which incur toll charges. Generally, only those calls outside of the South Florida Local Access and Transport Area (LATA) extending from Sebastian to Key West will incur long distance toll charges. Reimbursement for personal long distance calls will be at the tariff rate identified in the monthly billing detail, including applicable taxes on personal use.

Only those services and calling features which are necessary based on the type of work involved are to be provided by the County. Local and long distance toll calls and use of 411 Directory Assistance should be kept to a minimum given the high cost of these services. Directory listings and Yellow Pages advertising costs should be carefully scrutinized and reduced or eliminated where possible, given that much of this information is now available online and in recognition of AT&T's plans to significantly reduce the number of printed White Pages directories.

Monthly reviews shall be conducted at the department level to ensure that all landline telecommunications services charged to an organization are applicable to that organization and

are valid County expenses. Periodic reviews of these services will also be conducted at the countywide level to examine existing usage patterns, identify trends (e.g., high Directory Assistance costs) and evaluate the potential use of new technologies, with the goal of reducing the cost of these services while maintaining or improving service delivery. Whether for County business or personal use, utilization of County-supplied landline telephones and services subjects the user to the requirements of the Florida Public Records Law.

**Periodic audits will be conducted and personal usage found not to be in accordance with this PPM will be considered inappropriate use of County equipment and may result in disciplinary action.**

## **RESPONSIBILITIES**

### Department Directors

Department Directors are responsible for assuring controls are in place for monitoring landline telecommunication charges incurred by organizations under their control. Monitoring processes are intended to assure subordinate employees' compliance with this PPM.

Department Directors are also responsible for designating a "Telecom Coordinator" who will notify ISS of any change in business operations (e.g., re-location) which necessitates a change in landline telecommunication services or recordkeeping.

### Telecom Coordinator

The Telecom Coordinator is responsible for coordinating with ISS in all matters relating to landline and wireless communications (office telephones, cell phones, air cards, fax machines, etc.). This includes coordinating the monthly departmental review of usage to assure policy compliance, and periodic reviews of the departmental database records to check accuracy and completeness with any discrepancy referred to ISS for review and correction. Where applicable, an employee or custodian name should be assigned to telephone numbers.

### Employees

Each employee will be responsible for self-auditing their personal use of telephones and avoiding the use of the County's landline telephones for personal calls that incur long distance toll charges.

Employees are also responsible for ensuring that personal use of telephones is kept to a minimum and does not interfere with the timely and thorough completion of job responsibilities.

### ISS

As the designated Resource Manager for this area, ISS will be responsible for:

- assisting departments with new telephone service and service change requests;
- administering the automated telecom usage and call management system and providing monthly statements of detailed call records to departments;
- processing monthly bill payments;
- updating the call management system database to reflect add/change/delete transactions submitted by departments;
- examining existing traffic usage patterns and adjusting services accordingly; and
- evaluating new technologies.

## **PROCEDURES:**

### **I. New Services and Service Changes**

#### **A. Service Request Initiation**

1. For new services, the department will identify the business need for telephone communications and work with the Voice Services Section of the ISS Network Services Division to refine and finalize individual requests. In determining the need for specific services and features, the following factors must be taken into consideration:
  - the need for the employee to forward calls to others when away from their desk, and the complexity of call forwarding required;
  - the need for the employee to answer incoming calls directed to other employees;
  - the need for the employee to transfer a misdirected call or any call in progress to another employee;
  - the likelihood that the employee will have multiple calls at the same time;
  - the volume of calls made by the employee resulting in the need for abbreviated dialing;
  - the need for conference calling;
  - the need to restrict the ability of the employee to initiate toll calls;
  - the type of directory listing, if any; and
  - the potential for new technologies (e.g., VoIP) to meet service needs.

For service changes, including moves and disconnects, the department will identify the change in business operations necessitating the request.

2. The department will complete a Voice Work Order (VWO) to document their requirements.

3. The completed VWO will be submitted to the Department Director or designee for signature approval.
4. The approved VWO will be forwarded to Voice Services for review and processing.
5. Voice Services will use the approved VWO to enter request information into the following systems:
  - ISS's internal Work Order system for staff assignment;
  - the County's financial system to initiate the actual ordering process; and
  - AT&T's Customer Care Connect system to initiate work by the service provider.
6. ISS will apply Resource Manager approval to complete the ordering process.
7. Voice Services will receive goods and/or services and will coordinate with vendors on any service issues that may arise.

B. Service Request Monitoring

1. AT&T will advise Voice Services of the status of service requests via e-mails and updates to the Customer Care Connect system. For disconnects, these advisories will include the estimated reduction in monthly charges resulting from the change.

Disconnections of telephone lines are typically completed by AT&T within 5 business days.

2. Voice Services will update the Work Order system using information from the Customer Care Connect system.

C. Service Request Verification

1. On a monthly basis, Voice Services will compare service request information from the Customer Care Connect and Work Order systems with "Other Charges and Credits" information from AT&T's Bill Management Service (BMS) system to verify the timely completion of the service request and accuracy of related charges.
2. Voice Services will notify AT&T, in writing, of any discrepancies identified through this monthly review, and advise departments accordingly.

3. The department should independently review their AT&T monthly bill using information from the County's telecom usage and call management system to verify the timely completion of their service request and accuracy of related charges, and notify Voice Services in writing of any problems.

## II. **Monthly Bill Review and Employee Reimbursement**

### A. Departments

Principle review responsibilities will typically be assigned to the department Telecom Coordinator who may delegate these duties to a subordinate under their direct supervision.

1. Using information from the County's telecom usage and call management system, the department will review AT&T monthly bill information to verify that all landline telecommunications services charged to their organization are applicable to their organization and are valid County expenses.
2. If discrepancies are found, the department will notify Voice Services in writing of these discrepancies and required action necessary to correct the discrepancies (e.g., correction of accounting information, etc.). Voice Services will follow up with AT&T as appropriate.
3. A preliminary review of monthly bill information will be undertaken to identify instances of personal or inappropriate use by employees. Areas of review should include:
  - calls of excessive duration;
  - long distance toll charges;
  - frequently called numbers;
  - calls to/from unusual locations; and
  - calls at unusual times.

Local toll and long distance toll calls should especially be reviewed.

4. Information regarding these instances must be communicated to the employee by the supervisor or manager for reimbursement or possible disciplinary action. Personal long-distance calls are generally prohibited as set forth in the Policy Section of this PPM.



B. Employees

1. Employees are responsible for identifying all instances of personal usage which result in the County incurring long distance toll charges and providing a written notification to their supervisor when such calls have been made, which explains the the call(s) were made.
2. Employees shall access the County's call management system to review the specific billing details for their personal long distance calls, including the amount of costs which are to be reimbursed to the County.
3. Employees shall provide a written notification to their supervisor explaining why personal long distance calls were made, the amount of charges to be reimbursed, and other pertinent details.
3. Employees' shall make reimbursement for personal long distance charges by check or money order made payable to "Palm Beach County Board of County Commissioners." Employee reimbursements shall be submitted to the department director for internal routing and deposit.

Payment must be accompanied by a marked up copy of the bill the payment is made against highlighting personal usage long distance toll charges, and a copy of the written notification.

4. A copy of the reimbursement check or money order, along with employee's written notification, shall be maintained by the department for auditing purposes.

C. Information Systems Services

1. The ISS Voice Services Division will review AT&T monthly bill information to identify charges associated with unusual traffic usage patterns and to verify that previously identified problem areas have been adequately addressed and are not recurrent.

An example of a problem area requiring monthly review involves invalid "third party" charges resulting from "cramming" practices.

2. For unusual charges, Voice Services will notify the affected department and/or AT&T in writing for follow-up action; for recurring problems, Voice Services will notify AT&T in writing and request "credit" for the associated charges.

III. Disposition of Telephone Instruments and Related Systems

- A. For disposition of telephone instruments and related systems, the department will

prepare the necessary fixed asset forms and coordinate the change with Voice Services.

- B. Voice Services will coordinate the change with vendors providing maintenance services for the affected instruments or systems.

**IV. Monitoring**

As part of the annual budget review process, each department shall review its telecommunication needs to determine the ongoing requirements for:

- existing telephone lines;
- existing calling features for each phone (refer to the Definitions section of this PPM for a list of calling features); and
- the same number and type of White Pages listings and level of Yellow Pages advertising (refer to the Definitions section for types of listings).



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**ROBERT WEISMAN**  
**COUNTY ADMINISTRATOR**

**Supersession History:**

1. PPM # CW-O-013, issued 7/1/1988
2. PPM # CW-O-066, issued 3/12/1999
3. PPM # CW-O-066, issued 12/1/2005
4. PPM # CW-O-066, issued 11/1/2011
5. PPM # CW-O-066, issued 12/5/2013



## EXHIBIT A

### DEFINITIONS

1. Bill Management Service (BMS)

Software available to customers of AT&T to analyze and inventory AT&T telecom expenses by allowing customers to sort and summarize AT&T monthly bill detail based upon criteria of their choosing.

2. Call Detail Report

A reporting capability of PBX systems which provides inbound and outbound call detail activity on a station-by-station basis.

3. Calling Card

A billing arrangement by which a call may be charged to an authorized telephone company credit card number.

4. Calling Feature

An additional service capability beyond basic telephone service ordinarily provided at an extra charge. Calling features are usually charged on a monthly per line basis at rates specified by the applicable Uniform Service Order Codes (USOCs). For local service, typical calling features include:

- *Call Forwarding* – permits a station user to have their incoming calls transferred automatically to any station within a designated group.
- *Call Forwarding - Busy Line* – automatically routes incoming central office trunk calls to an attendant or voicemail when called station is busy.
- *Call Forwarding – Don't Answer* – automatically routes incoming central office trunk calls to an attendant or voicemail after a pre-selected number of rings.
- *Call Hold* – permits any call in progress to be “held” by dialing a code or pressing a button, thus freeing the line for the purpose of originating another call.
- *Call Pickup* – enables a station user to answer incoming calls directed to other stations within their own pickup group by dialing a code.
- *Call Transfer - Individual* – permits a station to transfer a misdirected call or any call in progress without the assistance of an attendant.
- *Call Waiting* – allows a station user to take a second call even if they are already on the line.
- *Conference/Three-way Calling* – permits a station user to add another station to an existing call.
- *Direct Inward Dialing (DID)* – permits a caller to be directly connected to a desired PBX system party without assistance of an attendant by using an extension number

## EXHIBIT A

### DEFINITIONS

assigned to that party from a range of numbers allocated to the PBX system by the telephone company to route the call.

- *Hunting/Rollover* – allows incoming calls to be routed to an available line in a predetermined sequence within a system.
- *Remote Call Forwarding* – allows the redirection of calls to a predesignated number outside the office, with charges applied by the local carrier.
- *Speed Calling* – permits the station dialer to reach other stations in a private branch exchange or local exchange by abbreviated dialing.
- *Toll Restriction* – limits the ability to initiate a local toll or long distance toll call from a particular station.

Less common services include:

- *Back-up Line* – an additional line for inward and outward calling with usage charges applying for originating and terminating calls.
- *Crisis Link* – a predefined plan intended to accommodate disaster recovery efforts by permitting up to ten telephone numbers in the plan to be rerouted to one backup number.
- *Non-DID Line* – a station used as a rollover to a DID line or for internal calls only.
- *Outgoing Only Line* – a line providing outgoing only access to the network and which cannot receive calls.
- *Reservationless Voice Conference* – a SUNCOM service which provides on-demand, 24x7 conferencing for up to 125 participants without the need to make a reservation.

#### 5. Central Office (CO)

A local operating unit by means of which telephonic intercommunication is provided for subscribers within a specified area under contracts for exchange service. An essential characteristic of a central office is switching equipment to which telephone stations are connected by means of circuits known as “Central Office Lines.”

#### 6. Centrex

A telephone company service that provides business switching services at the Central Office, instead of by a customer-owned PBX or key system. In a Centrex system, each office telephone has its own line back to the Central Office, and the call switching is performed there.

## **EXHIBIT A**

### **DEFINITIONS**

7. Circuit

A discrete (specific) path between two or more points along which signals can be carried.

8. Class of Service

A vendor or PBX assigned code used to describe general categories of telephone services furnished a subscriber in terms such as:

- for Exchange Service:
  - Grade of Line: *Individual*
  - Type of Rate: *Flat* or *Message*
  - Character of Use: *Business* or *Residence*
  - Dialing Method: *Touch-tone* or *Rotary*
- for Long Distance Service:
  - Type of Call: *Station-to-Station* or *Person-to-Person*
- for Wide Area Service:
  - Type of Service: *Outward* or *800 Service*

The code serves to permit calling capabilities or impose restrictions on a user.

9. Customer Care Connect

A legacy AT&T system currently used by Palm Beach County to order services and monitor the status of service requests.

10. Directory Assistance/Directory Assistance Call Completion

A service which provides the customer a local exchange subscriber telephone number and local call completion to the number provided, if requested, given a listed name and address. These calls are typically referred to as “411” calls.

11. Directory Listing

The publication, sometimes at an additional charge, in a service provider’s directory (e.g. “White Pages” Directory) and/or information records of information relative to a subscriber’s telephone number, by which telephone users are enabled to ascertain the call number of a desired station. Directory listings are charged on a monthly per line basis at rates specified by the applicable Uniform Service Order Codes (USOCs). Listing types include:

- *Caption* – the listing of a subscriber’s name without address or telephone number

## EXHIBIT A

### DEFINITIONS

followed by a series of indented listings covering branches or different departments of the business.

- *Cross Reference* – the listing of a generally accepted name of a subscriber followed by a reference to another listing.
- *Foreign Exchange* – the listing of a subscriber in the alphabetical list of an exchange other than that for the exchange from which the subscriber is served.
- *Indented* – listings of a subscriber having more than one listing for services under the same name at one or more locations.
- *Stylist Service* – a listing consisting of upper case alpha and/or numeric characters in lieu of standard numeric characters.

Non-listing types include:

- *Non-listed (Semi-private)* – a listing not in the alphabetical section of the service provider's directory, but is maintained on directory assistance records and will be furnished upon request of a calling party.
- *Non-published (Private)* – a listing not in the alphabetical section of the service provider's directory or directory assistance records and will not be furnished upon request of a calling party.

12. Earning Account

The account under which the customer's service is established and provisioned.

13. Exchange

A central office or group of central offices, together with the subscriber's stations and lines connected thereto, forming a local system which furnishes means of telephone intercommunication without toll charges between subscribers within a specified area, usually a single city, town or village.

14. Expanded Local Exchange Service

A type of telephone service furnished under tariff provisions whereby subscribers of a given exchange may complete calls to and, where provided by the tariff, receive messages from one or more exchanges without the application of long distance message telecommunications charges. However, a standard surcharge is applied each month to affected telephone lines for this service.

The expanded local exchange service for Palm Beach County extends from Sebastian in Indian River County to Key West in Monroe County.

## **EXHIBIT A**

### **DEFINITIONS**

15. Local Access and Transport Area (LATA)

A geographic area established for the Administration of Communications Service. It encompasses designated exchanges, which are grouped to serve common social, economic and other purposes.

16. Local Exchange Service

A type of localized calling whereby a subscriber can complete calls from their station to other stations within a specified exchange without the payment of long distance charges.

18. Private Branch Exchange (PBX)

A telephone exchange that serves a particular business or office, as opposed to one that a common carrier or telephone company operates for many businesses or the general public. PBXs operate as a connection between a private organization, usually a business, and the public switched telephone network.

The general term “extension” is used to refer to any end point on the branch.

19. Resource Manager

The Director of a County department, or designee, who has been given the responsibility for monitoring and approving the County’s procurements of specific commodity groups as specified in the Purchasing Department’s policies and procedures (Palm Beach County Code).

The Director of ISS is the designated Resource Manager for computer and telecommunications related goods and services (Purchasing Policy and Procedures). The IT Resource Manager is responsible for reviewing and approving all purchases of IT-related goods and services, to assure technical compatibility and compliance with standards and strategic direction (Information Technology Governance Policies).

20. Resource Manager Control Report

A report used by the Resource Manager to monitor and control using departments’ requests for goods and services in this area of responsibility.

21. Station

A unit of service, complete with customer or vendor provided telephone instrument and lines (circuits), so arranged as to permit sending and receiving messages through the exchange and long-distance network.

22. Telecommunications (Telecom)

## EXHIBIT A

### DEFINITIONS

Transmission and reception of voice, data, text, image or video information over a distance by wire, cable, radio, optical, or other electromagnetic system.

23. Telecom Usage and Call Management System

An application installed in the County which provides telecommunications management reports and call records review. Call information by employee, by department, and on a countywide basis is available over the County's Intranet.

24. Telephone Instrument

Wall mounted and desk set types of rotary dial and touch-tone telephones, emergency call boxes, and wired and wireless conference units.

25. "Third Party" Charge

Charges from a telecom service provider other than AT&T that appear on the AT&T monthly bill. In many cases, these charges are the result of "cramming" practices, and therefore, are invalid.

As per AT&T, it is the customer's responsibility to follow up to determine if these third party charges are valid.

26. Toll Call

A telephone call made outside the local exchange service area and commonly charged on a per minute basis to the calling party. Toll calls include the following types:

- *Local Toll (intraLATA) Service* – calls within a specific Local Access and Transport Area (LATA), including calls within the same area code or different area codes across town, in the next county, or, in some cases, an adjoining state.
- *Long Distance Toll (interLATA) Service* – calls outside the local exchange and local toll service areas, calls that originate in one LATA and terminate in another, and international calls.

Refer to the definition for *Expanded Local Exchange Service* for exceptions to the *Toll Call* definition.

27. Uniform Service Order Code (USOC)

An industry-wide code used for service and product identification purposes.

## **EXHIBIT A**

### **DEFINITIONS**

A lookup tool for current USOCs is available at the following AT&T website:  
<https://apps.wholesale.att.com/usoc/>.

28. Voice over Internet Protocol (VoIP)

Technology that allows voice to be carried over Internet connections or other networks, which are not designed specifically to carry voice, using Internet Protocols (IP).

29. Voice Work Order (VWO)

A web-based work order program used by departments to initiate communications equipment and service requests from the ISS Network Services Division, Voice Services Section.

30. Yellow Pages Advertising

The publication, for a charge, in a service provider's advertising directory (e.g. "The Real Yellow Pages" Directory) of information relative to a subscriber, by which directory users are enabled to ascertain the providers of specific goods and services. Yellow Pages advertising costs appear on the AT&T monthly bill as "BAPCO" (BellSouth Advertising & Publishing Corporation) charges.



## EXHIBIT B

### Palm Beach County, Florida

### County-supplied Landline Telephone

### PERSONAL USAGE REIMBURSEMENT FORM

*Purpose: This form is to be used for reimbursement of personal usage charges made with a County-supplied landline telephone as further described below.*

I \_\_\_\_\_ (print your name), Employee ID number \_\_\_\_\_, an employee of the Palm Beach County Board of County Commissioners, \_\_\_\_\_ (Department/Division), hereby claim that I have used a County-supplied telephone with number \_\_\_\_\_ for the period of \_\_\_\_\_ (print month(s) and year of invoice) and that personal usage charges as allowed by Countywide PPM #CW-O-066 (e.g., for personal directory assistance calls, personal local toll and long distance toll calls, and personal "third party" charges) were incurred. These personal usage charges are highlighted on the attached invoice(s). The enclosed check for \$\_\_\_\_\_ covers the cost of these personal usage charges at the tariff rate identified in the monthly billing detail, including applicable taxes on personal use.

**This statement must be attached to the appropriate invoice(s) and signed by the County employee who is assigned use of the County-supplied telephone. By signing this Personal Usage Reimbursement form and attaching it to the associated invoice(s), you are acknowledging that you have used the telephone for personal use. You further understand that periodic audits will be conducted and personal usage found not to be in accordance with this Personal Usage Reimbursement form will be considered inappropriate use of County equipment and may result in disciplinary action.**

Employee Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Approved by: (print name and title) \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_