

CORNELL CELLULAR ACCOUNT GUIDELINES

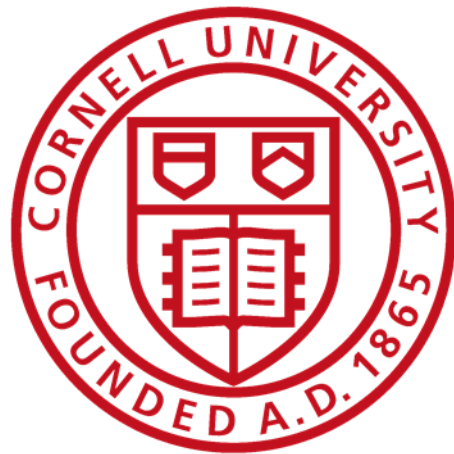




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PREFACE

[University Policy 3.24](#), Mobile Communication Devices, has been revised by senior management, the Controller's Office, Procurement Services, and CIT to help control wireless expenditures. The revised policy, which applies to Ithaca campus units, creates significant changes to the manner in which mobile devices (such as cell phones) are provided to faculty and staff members.

For purposes of this document, the key components of the policy revision include (1) raising the level of approval for issuance of a university device (2) limiting choices for mobile devices and (3) outlining the protocols associated with managing the different facets of Cornell's corporate wireless accounts. These protocols apply to new lines of service and equipment, as well as to employees moving services to or from the Cornell account.

Please refer to the wireless carrier sections of this document for information specific to cellular service providers.

If you have any questions, please contact one of the following Wireless Business Group ("WBG") representatives:

- Tom Huegel – Phone: (315) 701-0855 Email: t.huegel@wirelessbusinessgroup.com
- Sam Serianni – Phone: (315) 701-0855 Email: s.serianni@wirelessbusinessgroup.com
- WBG Email: cornell@wirelessbusinessgroup.com

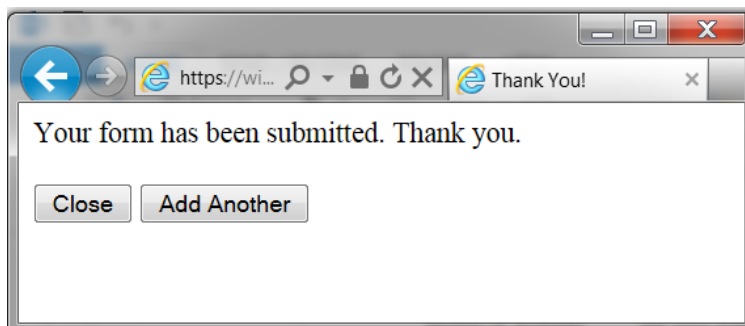


PROCEDURES

Employees Requesting a University-Owned Phone

Obtaining New Service or a New Number

If an employee is required to have a device as part of a job function and has never been issued a university-owned phone, new service can be established through the Cornell “Cellular Request Form”. The employee will complete the form and provide his or her supervisor’s name and NetID. The form, which is available on the [Ordering Portal](#), will automatically be routed to the supervisor listed, once submitted by the employee. The employee will receive confirmation of the submission.



Note: Selection is limited to **pre-determined devices**. The purchase of accessories (i.e., charging blocks, cases) are available upon request and should be indicated in the “Comments” section at the bottom of the Cornell Cellular Request form.

The supervisor will receive an email with a copy of the order. It is the responsibility of the supervisor to obtain vice president or dean approval in compliance with University Policy 3.24, Mobile Communication Devices, prior to approving the cell phone request. The supervisor will click the Approve button in the email and in the pop-up screen provide his or her NetID, the Shared Service Center (SSC) for account validation, the name of the authorizing vice president or dean, and confirm the request. If the supervisor cannot attest to the authorization from the vice president or dean, then the supervisor should deny the request. Each unit will have its own consistent method for obtaining vice president or dean approval.



Mon 3/2/2015 8:29 AM
 notify@quickbase.com
New Order Submitted for Approval

To: Mary L. Flaherty

If there are problems with how this message is displayed, click here.

MessageHeaderAnalyzer Bing Maps

Mary Flaherty

Comments

TEST TEST TEST

Approve **Deny**

https://wi... Approval Form

By entering this information, you acknowledge/attest your Dean/VP has pre-approved this request per University Policy 3.24, Mobile Communication Devices.

Supervisor

Net ID*

FTC/BSC Account

Approval*

Dean/VP Name*

Close Confirm

Once the order attestation has been provided and the order confirmed, it is routed to the SSC selected from the drop-down list (see image above) for final confirmation. The SSC will receive an email with Approve and Deny buttons. The SSC may edit the account, approve or deny the request, or forward the email to a college officer, senior finance representative, vice president or dean for final confirmation – based on the internal procedures established by the college/unit. The account may be corrected but the order may not be modified at this point.

Please review and approve.

Account #*

Sub-Account #

Object Code

Sub-Object Code

Project Code

Approve

Following this confirmation step, the request is automatically emailed to the Wireless Business Group (WBG), a Cornell contractor, for processing. Once completed, WBG will send the carrier order confirmation (including shipping information) to the originating employee. The new line of service will then be added to a university pool of corporate users.



Obtaining a Replacement Device or Retaining an Existing Number

If an employee has been approved for continuation with a university-owned device and currently has a university-owned phone, the employee may use his or her existing university-owned phone until a replacement device is needed. When the employee requires a replacement device, he or she must submit the equipment request, utilizing the same Cellular Request Form, which is available on the [Ordering Portal](#).

Once submitted, the same approval process and protocols noted above will be followed.

AT&T MOBILITY USER GUIDELINES

Moving Your Personal Line to a Cornell Account

Employee Responsibilities

If an employee qualifies and is interested in retaining his or her current personal cellular number and migrating it to a Cornell corporate account:

1. Upon approval from their immediate supervisor, employee to contact AT&T Customer Service during normal business hours: (800) 331-0500.
2. Ask the customer service representative to note the account stating Cornell will be assuming responsibility for the billing (you'll be asked to provide your name and cellular phone number). Referred to as a "Transfer of Billing Responsibility" (TOBR)
3. Once completed, inform your supervisor/director that you have contacted AT&T requesting the change, and that a note was added to the account. **The original request is valid for 60 days. After that time, a new request must be initiated with AT&T.**
4. Submit a request using the Cellular Request Form to initiate the change in billing responsibility. In the "Comments" section at the bottom of the form- indicate you are requesting to move your personal account to the Cornell account.



Additional Notes:

- If you are approved to do so, you can migrate a personal mobile device to a Cornell corporate account, regardless of the phone's operating system (i.e., Android or iPhone).
- When a corporate device needs to be replaced, a basic model iPhone or flip-phone will be provided.
- **Employee lines/numbers cannot be enrolled in AT&T's "Device Payment" program.** Employees are not allowed to transfer service from a personal name to a company name *until the equipment has been paid in full.*
- If your line is listed as the primary line on your personal account, and it is transferred to Cornell, AT&T will assign another line on the personal account as the primary number.
- When you migrate your line to a Cornell account, there are no contractual implications to the remaining lines of service on your personal account.
- Your Cornell discount, assuming you have one, should remain intact for the primary line on your personal account. If wireless services remain in your name and are billed directly to you, you should confirm with AT&T that the Cornell "Employee Foundation Account Number" (FAN) is attached to your account, and that you are receiving the Cornell employee discount. Cornell Sponsorship FAN: 2429424.
- If you migrate your personal number to the Cornell corporate umbrella, the contract on your existing line would remain in place, and you will be subject to the same upgrade requirements originally agreed upon.

WBG Services Responsibilities

Once the employee has contacted the carrier and WBG has received the approved Cellular Request Form to transfer services, WBG will notify the carrier and complete the process for moving the line.

From there, WBG will contact the employee to notify them that the number has been migrated to the Cornell account.

*The employee should still expect to see prorated charges on the subsequent invoice from AT&T, following the transfer of the number.



AT&T Cornell Line to a Personal Account

For employees migrating their Cornell corporate number to their personal name, the following steps are required:

- 1) Employee, with supervisor approval, emails WBG (Cornell@wirelessbusinessgroup.com) to start the process for releasing the corporate line to the employee. WBG will contact AT&T and have notes added to the account, indicating Cornell is allowing a change in billing responsibility.
- 2) Once completed, WBG will notify the Employee. In turn, Employee calls AT&T Customer Service (800-331-0500) to accept ownership of the wireless number and to assume billing responsibility. Further;
 - a) If the Employee does not have service with AT&T – the employee should be prepared to provide the following information to AT&T:
 - Social Security Number
 - Driver's License Number
 - Date of Birth
 - Billing Address
 - Rate Plan. The Customer Service rep should be able to offer options based on historical usage.
 - b) If the Employee has an existing line of service with AT&T:
 - *They will need to be an "Authorized User" on the account* in order to add the line to the existing account. As an aside, it's also recommended the account is listed in the Employee's name in order to receive the Employee discount available through AT&T.*
 - Ask the Customer Service Representative regarding a "shared plan" recommendation – assuming one isn't in place. If the Employee has a shared plan – the line can be incorporated into the existing group. A plan adjustment may be necessary based on the prior use of the newly added line (i.e. if the newly added line averages X of data each month, it may require a bump up in plan).



*In order to receive the Employee Discount – the employee must provide the AT&T Representative with the Cornell Employee FAN (Foundation Account Number): 2429424. Employees can also visit an AT&T Corporate store and provide the same information. Cornell employment ID is required. Note – unlimited plans do not qualify for a discount.

AT&T Support Contact Information

In the event an employee has any issues in migrating the line from their personal service to the business account, there are a number of resources available to help:

1. Customer Service:

- (800) 331-0500 for questions regarding your current personal account (e.g., rate plans, features).

2. Local Store:

- 748 South Meadow Street #200, Ithaca, Phone: (607) 273-0400

3. AT&T Contacts:

- JP Gillies. Email: jg048j@att.com / Phone: (724) 309-9783

4. Wireless Business Group:

- Tom Huegel – Phone: (315) 701-0855 Email: t.huegel@wirelessbusinessgroup.com
- Sam Serianni – Phone: (315) 701-0855 Email: s.serianni@wirelessbusinessgroup.com
- cornell@wirelessbusinessgroup.com



VERIZON WIRELESS USER GUIDELINES

Moving a Personal Line to a Cornell Account

Employee Responsibilities

1. Upon receiving approval from their supervisor to move their personal line to the Cornell account, the employee should contact Verizon Customer Service during normal business hours: (800) 922-0204 and ask the customer service representative to add notes to the account, stating Cornell will be assuming responsibility for the billing. Verizon refers to this as an "AOL" (Assumption of Liability).
2. Once completed, inform your supervisor/director that you contacted Verizon requesting the change. **The original request is valid with Verizon for 30 days.**
3. A new request must be initiated using the Cellular Request Form to complete the transfer of service. In the "Comments" section at the bottom of the form – the employee would note they are requesting to move their personal number to the Cornell account.
4. Once the Request Form has been approved by the supervisor and [BSCSSC](#), WBG will contact Verizon and complete the transfer of services. *Note the employee should still expect to receive at least one more prorated invoice from Verizon, as the line is moved to the Cornell corporate account.

Additional Notes:

- If you are approved to do so, you can migrate your personal mobile device to the Cornell corporate account, regardless of operating system (i.e., Android or iPhone).
- When a corporate device needs to be replaced, a basic model iPhone or flip-phone will be issued, without exception.
- **Employees cannot be enrolled in Verizon's "Device Payment" Program.** Employees are not allowed to transfer service from a personal name to the Cornell account *until the equipment has been paid in full.*
- If you are enrolled in the Device Payment Program, and you retain your personal account, you can be issued a new phone and assigned a new cellular number. In retaining your personal number, you should not expect the university to reimburse you for the expenses associated with the use of the personal line.



- If your line is listed as the primary line on your personal account and it is transferred to Cornell, Verizon will assign another line on the account as the primary number.
- When releasing the number to Cornell, ask the customer service representative to review the remaining lines on your personal account (assuming you have additional lines of service) and make recommendations for adjusting your rate plan, based on your current usage. For instance, should you lower your rate plan, or have it remain the same?
- When migrating your line to the Cornell account, there are no contractual implications to the remaining lines of service on your personal account.
- Your Cornell discount, assuming you have one, should remain intact for the primary line on the personal account. When speaking with the Verizon customer service representative, please confirm that the Cornell employee discount is still on your Verizon account. *You can check discount eligibility by going to: Verizon.com/discounts.
Note: Unlimited plans are not eligible for discount.

Moving Your Cornell Line to a Personal Account

For employees migrating their Cornell corporate number into their personal name, the following steps are required:

- 1) Employee, with supervisor approval, emails WBG (cornell@wirelesbusinessgroup.com) to start the process for releasing the corporate line to the employee. In turn, WBG will contact Verizon Customer Service to release the corporate responsibility for the number.
- 2) Once completed, employee calls Verizon Customer Service (800-922-0204) to accept ownership of the wireless number and to assume billing responsibility. Further;
 - a) If the Employee does not have service with Verizon – the employee should be prepared to provide the following information:
 - Social Security Number
 - Driver's License Number
 - Date of Birth
 - Billing Address
 - Rate Plan. The Customer Service rep should be able to offer options based on historical usage.



b) If the Employee has an existing line of service with Verizon:

- *They will need to be an “Authorized User” on the account* in order to add the line to the existing account. As an aside, it’s also recommended the account is listed in the Employee’s name in order to receive the Employee discount available through Verizon.*
- Ask the Customer Service Representative for a “shared plan” recommendation – assuming there isn’t one in place already. If the Employee has a shared plan – the line should be incorporated into the existing group. A plan adjustment may be necessary based on the prior use of the newly added line (i.e. if the newly added line averages X of data each month, it may require a bump up in plan).

*Once the line has been moved into the Employee’s name, in order to receive the Employee Discount – log-on to: www.verizonwireless.com/discounts for more information on discount enrollment.

Verizon Support Contact Information

1. Verizon Customer Service: (800) 922-0204
2. Local Store: 720 S Meadow Street, Ithaca, Phone: (607) 216-0075
3. Verizon Campus Contact: Joe Solomon, Email: joseph.solomon@verizonwireless.com / Phone: (413) 454-7568

My Extension Everywhere

My Extension Everywhere (previously known as Extension to Cellular or EC 500) is an optional service for faculty and staff. When My Extension Everywhere is activated, calls to your campus phone number will ring simultaneously on any designated 10-digit phone number such as a cellular phone.

My Extension Everywhere provides you with a number of additional benefits, including reducing your expenses - particularly if you have a Cornell-owned smartphone. To subscribe to My Extension Everywhere ask your Telecommunications Coordinator to submit a Request for Service form to the IT Service Desk. If you choose to turn in your desk set, you can save the difference between the cost of the desk set and the cost of the My Extension Everywhere service.



The My Extension Everywhere service isn't a "ready-to-go" service. There is a one-time \$10.90 cost associated with the activation on each person's campus extension as well as a \$3.15 monthly charge.

For more information, visit CIT's [My Extension Everywhere](#) page.

Zero Usage

Zero Usage Definition: No voice, text or data, usage for phone, smartphone, iPad, tablet or Mifi device

Process for "zero use" lines (six months):

WBG will suspend Cornell corporate cellular phones/numbers that have shown "0 use" over a continuous six-month period (no minutes, no text, no data), as reported by WBG to Procurement.

- Number will remain suspended for up to three months if no additional action is taken (i.e. request from employee to reinstate line or cancel it).
- Once the three-month suspension expires, assuming there has been no communication from the employee, supervisor or SSC regarding the number and no additional action taken, the number will be cancelled by WBG, as directed by Cornell's Procurement Office.
- The department and/or employee will have the option to reinstate the number(s) if Procurement and/or WBG is notified in writing within one week of the cancellation, otherwise the number may be reassigned within the carriers' systems.
- Exemptions: Any devices to be utilized for Disaster Recovery or cellular infrastructure testing purposes. Exempted devices will be labeled as "Approved".



Stipulations / Additional Detail by carrier:

1. AT&T WIRELESS

AT&T allows Cornell to suspend numbers for up to 90 days at the current monthly rate or for \$10 a month ("Seasonal Suspension").

- Once the 90-day cycle has been completed and assuming no action has been taken, AT&T will automatically reinstate the service at the original rate. Cornell has the option to suspend service in this manner twice in a given year (180 days total).
- If an AT&T line is cancelled, it could result in the loss of the number and also require ordering a new SIM card for the device. If a new SIM is needed, it could mean at least two to three days in downtime, as a new SIM is shipped to the department / employee.
- If an AT&T line is cancelled, a new request would need to be submitted using the Cornell Equipment order form ([Equipment Order Link](#)).

2. VERIZON WIRELESS

Verizon allows for the suspension of service for 90 days at the current monthly rate or \$0 monthly billing.

- Once the 90-day cycle has been completed and assuming no action has been taken, Verizon will automatically reinstate the service at the original rate. Cornell has the option to suspend service in this manner twice in a given year.
- If a Verizon line is cancelled, it could result in the loss of the number and also may require ordering a new SIM card for the device. If a new SIM is needed, it could mean at least two to three days in downtime, as a new SIM is shipped to the department / employee. *Some Verizon SIM's can be redeployed, reactivated.
- If a Verizon line is cancelled, a new request would need to be submitted using the Cornell Equipment order form ([Equipment Order Link](#)).



FREQUENTLY ASKED QUESTIONS REGARDING "0 USE" LINES:

1) How will phones be suspended?

After WBG receives an email confirmation from Cornell noting approval to move forward, the suspension process will occur with one of the following actions:

- a) WBG will go through a report line-by-line and suspend them on-line, which typically takes an hour.
- b) WBG to send a request to the AT&T and Verizon off-line teams to suspend lines. The turn-around is generally 24 hours to complete the suspensions.

2) What are the steps if someone wants to end the suspension?

- a) Send an email to WBG: cornell@wirelessbusinessgroup.com requesting the suspension be lifted.

In the email, confirm the cellular number to be reactivated, the wireless carrier and the rationale as to why the device needs to be active.