

CORNELL CELLULAR ACCOUNT GUIDELINES

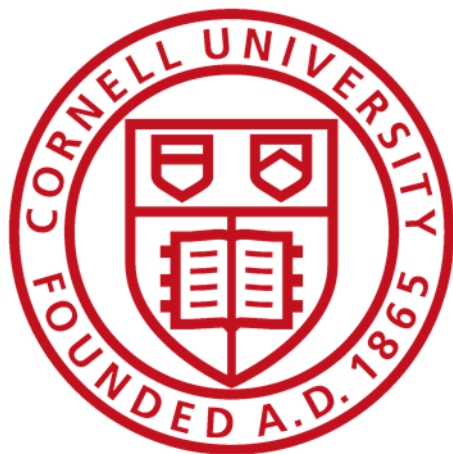




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PREFACE

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) removal of job-related allowances (JRAs); and (3) limiting choices for mobile devices. These protocols apply to new lines of service and equipment, as well as to employees moving from a JRA to the Cornell corporate account.

A Cornell employee receiving a JRA may be allowed to transition his or her cellular service from a personal account to a Cornell corporate account in lieu of any current allowance. There are certain conditions that must be met in order for the transition to occur. 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 representatives:

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

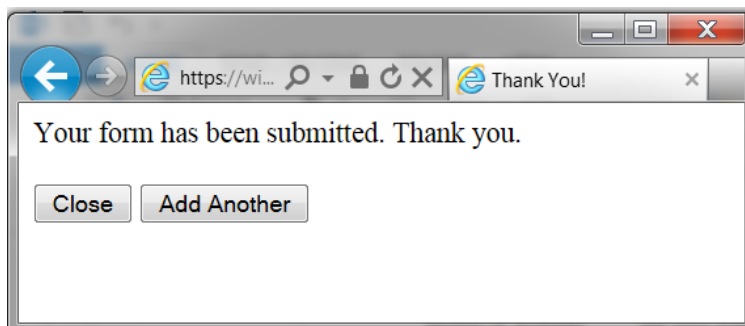


PROCEDURES

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 (and does not receive a JRA), 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. The employee will receive confirmation of the submission.



Note: Device selection is limited to **pre-selected phones**. The purchase of accessories (i.e., car chargers, cases) and other ancillary items are not an option. Accessories are not Cornell reimbursable expenses and are the responsibility of the phone holder.

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 FTC/BSC 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*

Once the order attestation has been provided and the order confirmed, it is routed to the FTC/BSC selected from the drop down list (see image above) for final confirmation. The FTC/BSC will receive an email with Approve and Deny buttons. The FTC/BSC 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

Following this confirmation step, the request is automatically emailed for processing to the Wireless Business Group (WBG), a Cornell contractor. 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.

Employees with JRAs Moving Service to a Corporate Account

If an employee has a JRA and has been approved to move his or her service and equipment to a Cornell corporate account with AT&T or Verizon, the employee should review the AT&T or Verizon User Guidelines that follow this section to understand the next steps and obtain guidance on the best way to handle Shared or Family plans, etc.*

*If the employee originally purchased the JRA-related equipment without reimbursement from Cornell, it is understood that the equipment is the property of the employee. The phone can still be used as a corporate phone and it is, with limited exception, *still subject to the "Contractual Terms and Conditions" originally agreed upon when the device was acquired, despite the transfer to one of Cornell's corporate cellular accounts.*

When the current contract expires (assuming there is one), and the employee becomes eligible for new equipment (i.e., a smartphone or a standard flip-style phone), the employee can submit the Cellular Request Form to request a new phone. Requests will be considered on a case-by-case basis and should be submitted only when new equipment is needed (e.g., the phone is broken, the phone doesn't meet technology requirements, etc.) and not based solely on contractual expiration.

Employees with JRAs Who are Not AT&T or Verizon Subscribers

If an employee with a JRA has been approved for a university-owned phone, but he or she is not an AT&T or Verizon subscriber, the dean or vice president of the department must be consulted to obtain an exception to stay with the current provider. Factors that will be considered include whether AT&T or Verizon provides cellular coverage at work and home and during necessary international travel, and whether AT&T or Verizon offers a specific, necessary device.

If approved by the dean or vice president, procedures for migrating a line from a JRA account to a Cornell corporate account will be addressed by WBG and the respective carrier.



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 cellular number and migrating to a Cornell corporate account:

1. Contact AT&T Customer Service during normal business hours: (888) 444-4410, Option 2, Option 5.
2. Ask the customer service representative to note the account stating that Cornell will be assuming responsibility for the billing (you'll be asked to provide your name and cellular phone number).
3. Once completed, inform your supervisor/director at your first convenience 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.**
 - a. It's important that you provide your supervisor/director with your name **exactly** as you provided it to AT&T (i.e., John A. Smith). Carriers are particular about ensuring that the name matches exactly when the assuming party calls to take over billing responsibility for the account.

Department Responsibilities

Each unit will provide Procurement Services with a list of employees previously receiving JRAs who are now approved for a university owned device. The list should include the following:

1. Cellular phone number to be moved to the Cornell account
2. Employee's name (exactly as it was provided to the carrier)
3. Department account number

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, Blackberry, iPhone, Windows Mobile).
- 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 Next program.** AT&T protocols do not allow Next customers to transfer service from a personal name to a company name *unless the equipment has been paid in full.*



- If you are enrolled in the Next program and you retain your personal account, you will be issued a new corporate phone and assigned a new cellular number. In retaining a personal number, you should not expect the university to reimburse you for expenses associated with the use of the line.
- 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 account as the primary number.
- When releasing the number to Cornell, ask the customer service representative to review your account and make any 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 you migrate your line to a Cornell account, there are no contractual implications to the remaining lines of service on your account.
- Your Cornell discount, assuming you have one, should remain intact. If wireless services will remain in your name and be billed directly to you, you should confirm that the Cornell sponsorship Foundation Account Number (FAN) is attached to your account, and that you are receiving the Cornell employee discount. The Cornell Sponsorship FAN is 2429424.
- If you have an **iPhone** and migrate to the Cornell corporate umbrella, the contract would remain in place, and you will be subject to the same upgrade requirements originally agreed upon.
- For conversions involving **non-iPhone devices** (i.e., Android, Windows Mobile, Blackberry, or wireless modem) the standard two-year agreement reverts to a one-year agreement, with any time already incurred counting towards that term.

Procurement Services Responsibilities

Once the employee has contacted the carrier, Procurement Services will notify the carrier and complete the process for moving the line. Call (888) 444-4410, Option 2, Option 5.

Be prepared to provide:

1. **Your name** (you must be listed as an authorized contact on the Cornell account)
2. **Cellular phone number** to be moved to the Cornell account
3. **Employee's name** (exactly as it was provided to the carrier)
4. Cornell's wireless **account number**
5. **Cost Center** (department account number) designation
6. Proper **rate plan**



AT&T Cornell Line to a Personal Account

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

1) An Authorized Contact from Cornell calls AT&T Customer Service (800-999-5445) to release the corporate responsibility for the number. In doing so, the Contact needs to provide the cellular number and the name of the Employee who will be responsible for assuming ownership of the number.

Another option is to email the same information to the Cornell AT&T Representative (Tim Parke) at tp6630@att.com and he can help get the process underway.

2) Once completed, the Authorized Contact notifies the Employee. 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 – they will be asked to provide the following:

- 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 for a "shared plan" recommendation – assuming one isn't in place. If the Employee has a shared plan (i.e. Family Talk Plan or Mobile Share) – 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).



*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.

AT&T Support Contact Information

In the event you have any issues in migrating the line from your personal service to the business account, there are a number of resources available to help:

1. Customer Service:

- Call (888) 444-4410, Option: 2, Option 5, **only** for account transfers, i.e., converting an individual account into corporate account
- Call (800) 331-0500 for questions regarding your current account (e.g., rate plans, features).

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

3. AT&T Contacts:

- Tim Parke - Phone: (607) 280-6270, Email: tp6630@att.com

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



VERIZON WIRELESS USER GUIDELINES

Moving Your Personal Line to a Cornell Account

Employee Responsibilities

1. Contact Verizon Customer Service during normal business hours: (800) 922-0204.
2. Ask the customer service representative to add notes to the account, stating that Cornell will be assuming responsibility for the billing. Verizon refers to this as an "AOL" (Assumption of Liability).
3. Once completed, inform your supervisor/director at your first convenience that you contacted Verizon requesting the change. **The original request is valid for 30 days. After that time, a new request must be initiated.**
 - a. It's important your supervisor/director has your name exactly as you provided it to Verizon (i.e., John A. Smith). The carriers are very particular about making sure that the name matches **exactly** when someone calls up to take over billing responsibility for the account. The supervisor must also have the Verizon account number associated with their department/cost center.
 - b. The employee and the supervisor can also call together to help expedite the process. In that case, the supervisor needs to know the Cornell account number to assign the line to (the university has multiple account numbers – in most cases they are aligned with the department and/or Cost Center).

Department Responsibilities

Each unit will provide Procurement Services with a list of employees previously receiving JRAs who are now approved for a university owned device. The list should include the following:

1. Cellular phone number to be moved to the Cornell account
2. Employee's name (exactly as it was provided to the carrier)
3. Department account number

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, Blackberry, iPhone, Windows Mobile).
- 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.** Verizon protocols do not allow Device Payment Program customers to transfer service from their personal name to a company name *unless the equipment has been paid in full.*



- If you are enrolled in the Device Payment Program, and you retain your personal account, you will 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 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 your account and make any 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 account.
- Your Cornell discount, assuming you have one, should remain intact. When speaking with the Verizon customer service representative, please confirm that the Cornell employee discount is still on your Verizon account.

Procurement Services Responsibilities

Once the employee has contacted the carrier, Procurement Services will notify the carrier and complete the process for moving the line. Call (800) 922-0204.

Be prepared to provide:

1. **Your name** (you must be listed as an authorized contact on the Cornell account)
2. **Cellular phone number** to be moved to the Cornell account
3. **Employee's name** (exactly as it was provided to the carrier)
4. Cornell's wireless **account number**
5. **Cost Center** (department account number) designation
6. Proper **rate plan**

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) An "Authorized Contact" from Cornell calls Verizon Customer Service (800-922-0204) to release the corporate responsibility for the number. In doing so, the Contact needs to provide the cellular number and the name of the Employee who will be responsible for assuming ownership of the number.



2) Once completed, the Authorized Contact notifies the Employee. 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 – they will be asked to provide the following:

- 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 (i.e. Family Share Plan, More Everything or Verizon 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 – the Employee has two options 1) validate employment/discount eligibility by email address or 2) validate by paystub or other proof of employment. 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 Contacts:
 - Shanesha Bryant – 443-820-4337
Email: cornelluniversity@verizonwireless.com
 - Yvonne Turner - 866-738-3800 Ext. 1183175
Email: cornelluniversity@verizonwireless.com
 - Michael Lovaglia - Phone: 607-725-6000
Email: Michael.lovaglia1@verizonwireless.com

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 (6 months):

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 (Wireless Business Group).

- Number will remain suspended for up to six months if no additional action is taken (i.e. request from employee to reinstate line or cancel it).
- Once the six-month suspension expires, assuming there has been no communication from the employee, supervisor or BSC regarding the number and no additional action taken, the number will be cancelled by WBG, as directed by the Cornell’s Procurement Office.

Process for “0 use” lines (12 months):

Any Cornell corporate lines with “0” use over a continuous twelve-month period, as reported by WBG (Wireless Business Group) will be cancelled by WBG, as directed by the Cornell 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.



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 could 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:

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 should take an hour
- b) Send a request to the AT&T and Verizon off-line teams and the turn-around is generally 24 hours.

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

- a) Send an email to either Tom Huegel or Sam Serianni (t.huegel@wirelessbusinessgroup.com ; s.serianni@wirelessbusinessgroup.com)
- b) In the email, confirm the cellular number to be reactivated and the rationale as to why they device needs to be active.