



Staff Mobile Phone Policy - Pilot Program

Policy Statement

After careful consideration, the University will extend the Staff Mobile Phone Policy pilot program through FY16 (July 1, 2015 to June 30, 2016). The University will continue to evaluate the pilot program periodically and may introduce changes for both new and existing staff in the future. Individual Harvard schools or units may have implemented more restrictive policies; staff should refer to local policy for more information.

As of September 1, 2014, all newly-hired Harvard University staff and existing staff who do not already have a Harvard mobile phone or receive reimbursement or other subsidy for a personal mobile phone (“covered staff”) must meet specified job-based eligibility criteria to receive University-provided **funding for voice, text or data plans**. Eligible staff may receive a standard monthly stipend to subsidize the incremental cost of business use of their personal mobile phones, commonly known as bring-your-own-phone (“BYOP”). The stipend amount during the pilot program is **\$50** per month.

Covered staff members are not allowed to receive payment and/or reimbursement (e.g., PCard, Corporate Card, directly billed to vendor) for mobile phone equipment, accessories, or plans other than as outlined in this policy.

During the pilot program, existing Harvard staff who already have University-provided phones or who receive reimbursement or other subsidy for a personal mobile phone will not be subject to the eligibility requirements; these staff may continue to use their Harvard mobile phone or receive reimbursement or other subsidy for a personal mobile phone during the pilot program. During the pilot, the existing Harvard staff who already have University-provided phones or who receive reimbursement or other subsidy for a personal mobile phone may opt in to the BYOP program with approval from their tub’s Administrative Dean or designee.

Reason for Policy

Harvard strives to provide employees with the right technology tools they need to do their jobs, to treat employees in similar roles equitably, and to use its resources wisely. The University recognizes that mobile phones are omnipresent and that many users want a single device that supports both their work and personal lives. The University seeks to support employees’ business technology needs while allowing users enough flexibility to choose devices and service plans that meet their personal and family requirements.



Who Must Comply

The pilot program applies to staff hired on or after September 1, 2014, and to existing staff who do **not** already have a Harvard phone or receive reimbursement or other subsidy for a personal mobile phone as of September 1, 2014. The policy does not include faculty. All Harvard University schools, tubs, local units, Affiliate Institutions, Allied Institutions and University-wide Initiatives must comply. Where University policy, local policy or sponsoring agency guidelines differ, the more restrictive policy will apply.

Procedures

- 1) **Eligibility requirements.** Harvard defines “eligible” staff as the following:
 - A. 24/7 access employees: day to day job responsibilities require routine response to **urgent (immediate action required)** University business at any time of the day or night – e.g., addressing student/lab safety issues, answering media requests, handling on-call server operations, etc.
 - B. Mobile employees: job requires routine field work and need to communicate real time with office to give or receive direction or manage official University social media accounts – e.g., property assistants, IT field techs, social media managers, communications officers.
 - C. Frequent travelers (defined as at least 30 travel days per year).
 - D. Other business cases proposed and justified by direct supervisor and approved by the Administrative Dean (or EVP in the case of Central Administration); must meet at least ONE of the following criteria.
 - a. Role requires staff member to routinely respond to urgent **(immediate action required)** University business while staff member is away from the office; supervisor must explain business necessity.
 - b. Role requires staff member to be routinely available while in remote locations, supervisor must explain business necessity.
 - c. Other business case; supervisor must explain business necessity.
- 2) **Stipend program:**
 - A. Program stipends are intended to reimburse employees for the incremental cost of business use of a personal mobile phone and thus represent nontaxable compensation to the employee. The stipend amount will be set and reviewed periodically by the Financial Policy Office in conjunction with Harvard University Information Technology and others. Program stipends are not considered additional base pay and therefore they are not eligible for benefits calculated on base pay. Stipends will be paid to eligible staff via payroll. The stipend amount for the pilot program is \$50 per month.
 - B. Mobile phone equipment, accessory and app costs are the responsibility of the employee; the employee is responsible for any loss, theft, or damage. The phone must be able to run current operating systems and software.
 - C. Phones of stipend recipients must meet University data security and software requirements (see appendices).



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Responsible Office: Financial Policy Office
Date First Effective: 9/1/2014
Revision Date: 6/15/2015

- D. Employees receiving the program stipend agree to provide the sponsoring department with current contact information within 3 business days of inclusion in the stipend program or within 3 days of a change in that information.
- E. Exceptions to stipend program: tubs may provide an eligible staff member a Harvard-owned phone in lieu of a stipend if there is a compelling business need to do so. Harvard-owned phones must be used until the device is no longer physically usable, is unable to run required software or operating systems, or must be upgraded for other technical reasons as identified by tub chief information officers.

3) Other forms of payment:

- A. Reimbursements for regular monthly mobile phone use for covered staff via other means such as PCard, Corporate Card, Web Reimbursement, etc. are prohibited.
- B. Reimbursement for *infrequent, extraordinary* business use of a personal device: ineligible or stipend-eligible employees who incur infrequent but significant personal communications expense while performing University business (e.g., while traveling) may submit an expense report with proper supporting detail seeking reimbursement of the cost in excess of their normal monthly plan cost. These reimbursements must be submitted in accordance with IRS accountable plan rules as with any other employee reimbursement, e.g., business travel expenses.

4) **Where appropriate, access to Harvard email and calendaring.** Users of Harvard's O365 or ICEMAIL should use the instructions listed in the Related Resources section; other users should contact their local school IT helpdesk. Note that some schools may require users to get approval from their supervisors before gaining access to Harvard email and calendaring; users should check with their local school IT helpdesk.

5) **Employee discounts.** All Harvard staff and faculty are eligible for discounts on their personal mobile phone plans through Harvard's negotiated rates, whether they are eligible for a stipend or not. Please see the Related Resources section.

6) **As a good practice, back up data on phone regularly.** All staff that have Harvard data on their phones are strongly encouraged to back up their data regularly. If a phone with Harvard data is lost or stolen, it must be remotely wiped and all of the data on the phone, both Harvard and personal, will be erased. Routine backups ensure continued access to both Harvard and personal data on phones; check with your device manufacturer for instructions on how to back up your data.

7) **Protect Harvard data:** staff must protect Harvard business-related data, whether on a Harvard-issued device or on a personal device used for business purposes, and delete or preserve Harvard data as required.

- A. Staff must wipe Harvard data from their phones (personal or Harvard-issued) when they are no longer actively using that data for their current Harvard role, e.g., when they leave the University, switch devices, give their phones away, turn in phones to Verizon/AT&T, etc.



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- B. If a phone (personal or Harvard-issued) that contains Harvard data is lost or stolen, the owner must immediately notify his or her Harvard IT group so that the device can be remotely wiped.

Responsibilities and Contacts

Administrative Deans or equivalent tub officers, including Central Administration, are responsible for ensuring that local units abide by this policy.

School/Tub Administrative Offices, including Central Administration, should establish reasonable and prudent practices for granting staff mobile phone stipends and a monitoring and approval process (e.g., an annual review of stipend recipients). Tubs should also strive to ensure that staff members are treated in an equitable manner.

Local Payroll Offices are responsible for uploading names of stipend recipients and coding strings into the University's payroll system.

Central Payroll, within University Tax Reporting, is responsible for processing stipends entered into the University's payroll system. **Contact:** <http://oc.finance.harvard.edu/services/central-payroll> or 617-495-8500.

The Financial Policy Office (FPO) is responsible for maintaining and answering questions about this policy. In partnership with Harvard University Information Systems and others, FPO is responsible for periodically reviewing and adjusting the stipend amount. **Contact:** financialpolicy@harvard.edu or 617-495-3976

Definitions

BYOP ("bring your own phone"): communication programs where employees can use their personal mobile phones for business use.

Covered staff: staff to whom this policy applies: staff hired on or after September 1, 2014 and staff who do not have a University phone or receive reimbursement or other payment for a personal phone as of September 1, 2014.

Eligible staff: staff who meet the job-based eligibility requirements

- A. 24/7 access employees: day to day job responsibilities require routine response to **urgent (immediate action required)** University business at any time of the day or night – e.g., addressing student/lab safety issues, answering media requests, handling on-call server operations, etc.
- B. Mobile employees: job requires routine field work and need to communicate real time with office to give or receive direction or manage official University social media accounts – e.g., property assistants, IT field techs, social media managers.
- C. Frequent travelers (defined as at least 30 travel days per year).
- D. Other business cases proposed and justified by direct supervisor and approved by Ad Dean (or EVP in the case of Central Administration); must meet at least ONE of the following criteria.



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- a. Role requires staff member to routinely respond to urgent (**immediate action required**) University business while staff member is away from the office; supervisor must explain business necessity.
- b. Role requires staff member to be routinely available while in remote locations, supervisor must explain business necessity.
- c. Other business case; supervisor must explain business necessity.

Routinely: for purposes of this policy, part of a staff member's regular day-to-day job responsibilities. While this will vary by role and unit, units are encouraged to think of "routine" as multiple times per week.

Frequent travelers: for purposes of this policy, more than 30 travel days per year.

Related Resources

[For Users of Harvard's O365/Exchange: Instructions for Accessing Harvard Email and Calendaring on Personal Devices](#) – Under "Email and Calendar" click "Config Guides" and choose the appropriate device

[For Users of Harvard's ICEMAIL: Instructions for Accessing Harvard Email and Calendaring on Personal Devices](#)

[List of Compliant BYOP Devices](#)

[Business Expense Reimbursement Policy](#)

[Discounted Personal Service through Harvard \(for all employees, both stipend eligible and stipend non-eligible\)](#) – Under "For Employees and Students," click on the link for "Personal Cellular Discounts"

[Travel Policy](#)

Revision History

6/15/2015: Extended pilot program through FY16; added clarifying information on upgrades, backing up data, etc., and added **Appendix E, Frequently-Asked Questions**

Appendices

Appendix A: IT Security Requirements

Appendix B: Sample Template: Mobile Phone Stipend Justification Form

Appendix C: Instructions on How to Convert Your HU Phone to a BYOP Phone

Appendix D: Instructions for Local Payroll Departments on Processing a Mobile Phone Stipend

Appendix E: Frequently-Asked Questions

Staff Mobile Phone Support Policy - Appendix A

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Information Technology

Mobile Device Security Requirements

Overview

The following requirements were recommended by the Mobile Device Security work group and endorsed by the CIO Council. These requirements apply to all mobile devices that may store or process Harvard confidential information, regardless of whether they belong to or are paid for by Harvard.

Requirements

All mobile devices that may store or process Harvard confidential information must:

- Have a passcode of at least 4 digits
- Have device encryption enabled
- Be configured to self-erase after 10 consecutive bad passcode attempts
- Have remote-wipe capability enabled
- Have a screen lock with maximum of 5 minute inactivity period

Appendix B – Sample Template Mobile Phone Stipend Justification Form

Name of supervisor submitting request:	
Harvard phone number of supervisor submitting request:	
Harvard email address of supervisor submitting request	
Name of staff member:	
Job title of staff member:	
School/Unit	
Coding to charge stipend (object code must be 8510)	
Reason staff member requires mobile phone stipend (check all that apply):	
A. <u>24/7 access employees:</u> day to day job responsibilities require routine response to urgent (immediate action required) University business at any time of the day or night – e.g., addressing student/lab safety issues, answering media requests, handling on-call server operations, etc.	
B. <u>Mobile employees:</u> job requires routine field work and need to communicate real time with office to give or receive direction – e.g., property assistants, IT field techs.	
C. <u>Frequent travelers</u> (defined as at least 30 travel days per year).	
D. <u>Other business cases</u> proposed and justified by direct supervisor and approved by Ad Dean (or EVP in the case of Central Administration); must meet at least ONE of the following criteria:	
a. Role requires staff member to routinely respond to urgent (immediate action required) University business while staff member is away from the office; supervisor must explain business necessity.	
b. Role requires staff member to be routinely available while in remote locations, supervisor must explain business necessity.	
c. Other business case; supervisor must explain business necessity.	
<i>I certify that this request is in compliance with the Harvard University Mobile Phone Policy:</i>	
Signature of supervisor submitting request:	
Signature of Administrative Dean/EVP:	



Staff Mobile Phone Policy - Appendix C

Request a Cellular Transfer of Billing Responsibility from Corporate to Personal

1. Receive approval from authorized point of contact from within your school/department
2. Submit request to assume financial liability for your cellular line,
<http://services.huit.harvard.edu/transfer-billing-responsibility-corporate-personal>
3. You will receive confirmation from HUIT-Unified Communications Customer Support that the line is ready for assumption of liability.
4. Once you receive confirmation that the line is ready for you to assume financial responsibility follow the process for the specific vendor and options listed below.



To keep service with Verizon Wireless:

1. The subscriber or account holder should then contact Verizon Wireless at 1-800-922-0204 to assume financial responsibility of the line.
 - a. If the subscriber plans to join an existing family account, the account holder or authorized person of the existing account must call Verizon Wireless to add the additional line to family plan.
2. You will be prompted to enter the cellular number you are calling about
3. When prompted press option 5, you will be prompted to speak what you are calling about. Speak “Account changes”, or press “0” for assistance.
4. Specify to the Verizon Wireless Representative that you wish to assume liability for the line you are calling about
5. The Verizon Wireless Representative will walk you through the change of liability process
 - a. The account holder and/or authorized person will need to answer some security questions related to current use of the device that is being transferred
 - b. Select plan that best meets your needs for voice, data and text
 - c. Account holder should review features to evaluate what they wish to keep or remove
 - i. Insurance, Hotspot
 - d. Be sure to get the Harvard University employee discount assigned to the account. The Harvard employee must be the listed account holder to obtain this discount. Discount is currently 18% off access. Proof of employment may be required: Copy of Harvard ID.

Verizon Wireless Website: (*Harvard Employee custom website. You must be logged in through Harvard PIN authentication*) <https://www.verizonwireless.com/hp/homepage>

Things to be aware of:

- If you plan to switch carriers – port line directly to your preferred carrier (*see instructions below: **To keep Harvard mobile number, but change to a new carrier***)
- Subscriber must transfer billing within 30 days from HUIT processing the request. If this is not completed you will need to resubmit the request to HUIT.
- Retail locations cannot assist you until you have fully assumed liability of your mobile line
- If establishing a new personal account, the subscriber may need to undergo a utility credit check by Verizon Wireless
- Most corporate users utilize less than 2GB of data monthly – but you should evaluate and make the best decision based on your personal and work requirements
- Once you have successfully assume responsibility for your line, if you are eligible, you may upgrade your device via the VzW Harvard custom web portal <https://www.verizonwireless.com/hp/homepage> (free shipping, overnight shipping, best discounts) or any retail location.
- The current contract of the line continues once line moves to personal liability.



To keep service with AT&T:

1. The subscriber or account holder should then contact AT&T at 1-888-444-4410 or visit any retail location to assume financial responsibility of the line.
 - a. If the subscriber plans to join an existing family account, the account holder or authorized person on the existing account must be the person to call AT&T to add the additional line to family plan.

If you call via 1-888-444-4410

2. Press option 2 for individual wireless service
3. Press option 5 to transfer the billing responsibility for your account
4. Specify to the AT&T Representative that you wish to assume liability for the line you are calling about
5. The AT&T Representative will walk you through the change of liability process
 - a. The account holder and/or authorized person may need to answer some security questions related to current use of the device that is being transferred and/or confirm name of subscriber.
 - b. Select plan that best meets your needs for voice, data and text
 - c. Account holder should review features to evaluate what they wish to keep or remove
 - i. Insurance, Hotspot
 - e. Be sure to get the Harvard University employee discount assigned to the account. The Harvard employee must be the listed account holder to obtain this discount. Discount is currently 17% off access. Proof of employment may be required: Copy of Harvard ID.

AT&T Website: (*Harvard Employee custom website. You must be logged in through Harvard PIN authentication*)
<http://www.att.com/wireless/HARVARD>

Things to be aware of:

- If you plan to switch carriers – port line directly to your preferred carrier (*see instructions below: **To keep Harvard mobile number, but change to a new carrier***)
- Subscriber must transfer billing within 60 days from HUIT processing the request. If this is not completed you will need to resubmit your request to HUIT.
- There may be a fee associated with this transaction
- If establishing a new personal account, the subscriber may need to undergo a utility credit check
- Most corporate users utilize less than 2GB of data monthly – but you should evaluate and make the best decision based on your personal and work requirements
- Once you have successfully assume responsibility for your line, if you are eligible, you may upgrade your device via the AT&T Harvard custom web portal <http://www.att.com/wireless/HARVARD> or any retail location.



To keep Harvard mobile number, but change to a new carrier:

Examples:

- *Current line is with Verizon Wireless and want to move to AT&T, T-Mobile or Sprint*
 - *Current line is with AT&T and want to move to Verizon Wireless, T-Mobile, or Sprint*
1. Receive approval from authorized point of contact from within your school/department
 2. Submit request to assume financial liability for your cellular line, <http://services.huit.harvard.edu/transfer-billing-responsibility-corporate-personal>
 3. You will receive confirmation from HUIT-Unified Communications Customer Support that the line is ready for assumption of liability.
 4. Call new carrier of choice to port line from current carrier to new carrier (Example: Verizon Wireless to AT&T) and assume responsibility for the line. Do not assume liability for the line under the current carrier – you will be charged early termination fees when you transfer to your new carrier of choice.
 - a. New Carrier will walk you through the process and requirements
 - b. You may be asked for the Harvard password (last 4 tax ID) : 3580
 - c. If you have any issues or need additional information contact HUIT – UC at huit-cellular@harvard.edu or 617-495-4900, option 2.

Cancel Harvard cell phone and use personal line:

If you no longer wish to be called on your Harvard assigned cell phone and want to use a personal cell phone.

1. Receive approval from authorized point of contact from within your school/department
2. Submit request to disconnect your Harvard owned cell phone: <http://services.huit.harvard.edu/cellular-disconnect-request-form>
3. You will receive confirmation from HUIT-Unified Communications Customer Support that the line has been cancelled.
4. You may send your device to HUIT at 1230 Soldiers Field Rd. Brighton MA to be securely recycled.
5. Departments may also choose to recycle devices through e-cycle by contacting Kevin Anderson, kevin.anderson@e-cycle.com, 1-508-902-7058

For additional assistance please feel free to contact HUIT-Cellular@harvard.edu or 617-495-4900 option 2. <http://huit.harvard.edu/services/cellular-services>

Staff Mobile Phone Policy – Appendix D

Bring Your Own Phone Stipend Processing Instructions for Payroll Offices

Bring Your Own Phone (BYOP) stipends should be processed via the Additional Pay Upload using the earnings code MDS (Mobile Device Stipends).

- The FY15 BYOP stipend amount is \$50 per month.
- The work instructions from the Additional Pay Upload can be found on Eureka: <http://eureka.harvard.edu/eureka/getDocument.cfm?id=833&sAppID=40>
- The payroll calendar which shows open and closing dates for each payroll can be found at the following link: <http://able.harvard.edu/hr-common/payroll-calendar.pdf>

Appendix E: Staff Mobile Phone Policy - Frequently-Asked Questions

If I already had a Harvard-provided phone as of 9/1/2014, can I keep it during the pilot?

Yes, during the pilot program, existing Harvard staff who already have University-provided phones or who receive reimbursement or other subsidy for a personal mobile phone (“grandfathered” staff) will not be subject to the eligibility requirements; these staff may continue to use their Harvard mobile phone or receive reimbursement or other subsidy for a personal mobile phone during the pilot program. Note that some schools may have implemented more restrictive policies; check with your tub’s Administrative Dean, vice president or designee.

If I already had a Harvard-provided phone as of 9/1/2014 and I take a different role at Harvard, am I still grandfathered?

No, only specific individuals in specific roles may be grandfathered. If a staff person who has a University phone changes roles, that person’s need for a phone in the new role must be evaluated against the eligibility criteria in this policy. Similarly, if a person is newly-hired into a role where the last incumbent was grandfathered, the newly-hired person’s need for a phone must also be evaluated against the eligibility criteria in this policy.

If I’m grandfathered and currently getting reimbursed for business use of a personal cell phone, can I get reimbursed for my entire personal cell phone bill?

Most people who have cell phones today also use them for personal activities. In general, reimbursements should be for the portion of a personal bill that is for University business, not for the entire personal bill.

If I have a grandfathered Harvard-owned phone, when can I upgrade it?

Grandfathered staff with Harvard-owned phones must use their existing equipment until the device is no longer physically usable, is unable to run required software or operating systems, or must be upgraded for other technical reasons as identified by tub IT group.

If I’m grandfathered during the pilot, can I “opt in” to the pilot and get a subsidy instead?

During the pilot, the existing Harvard staff who already have University-provided phones or who receive reimbursement or other subsidy for a personal mobile phone may opt in to the BYOP program with approval from their tub’s Administrative Dean, VP or designee.

If I’m grandfathered during the pilot can I give up my Harvard-owned cell phone and get my personal cell phone reimbursed fully, or will I only be entitled to a \$50 stipend?

As noted above, most people who have cell phones today also use them for personal activities. In general, reimbursements should be for the portion of a personal bill that is for University business, not for the entire personal bill. The grandfathered person can keep his/her Harvard owned cell phone or use his/her personal phone and receive the \$50 stipend.