**Addiction Research Lab (ARL)/DoIT Cellular Services Meeting Notes**

**Date:** August 18, 2016  
**Meeting Time: 9:30 a.m.**  
**Participants:** Susan Atkinson, John Curtin, Candace Johnson-Hurwitz, Kathy Neitzel, Julie Pfaffle, and Susan Schneck

**UW Subaccount vs. UW Main Account & Other Account/Phone Considerations**

* It was decided the lab will be set-up with a subaccount. The subaccount will be a shared pool of minutes among other active lines in the account as opposed to the UW main account that shares minutes among all UW mobile phone lines. The subaccount will allow access to the Verizon portal.
* Phone information can be accessed on the portal for at least one year, even after the phone has been transferred from the subaccount.
* It was decided that the smoking study phones lines will be transferred over to the subaccount to increase the shared pool of minutes.
* ARL can order phone lines with 400/600/1000 minutes per month.
* It was decided that device protection ($8.18 per line) will be purchased for all study phones. Device protection must be ordered within the first 30 days of phone purchase.

**Porting Study Participants Phone Numbers to University Verizon Account**

* Kathy and Julie provided written documentation outlining the initial steps to begin the porting process. The document was reviewed. It was agreed that the steps outlined in the document will be followed by ARL staff.
* In addition to the steps outlined in the written document, ARL staff will also complete the following in the pre-port phase:

1. Identify if participant’s device is a basic device or a smart phone
2. If the participant is on a device payment plan (cannot be ported until the device is paid off)
3. Does the participant have a google phone number? (Difficult to port)
4. Check porting eligibility via web link (Kathy/Julie to email link)
5. ARL staff to notify Kathy and Julie to cancel/reschedule port request via email

* Kathy to email written documentation for “day of porting” guidelines. ARL staff will notify Kathy at least 5 days prior to needed port date. ARL should expect port to happen on the date requested. The port time is expected to begin 20 minutes after the time submitted on the request. Ex: if the appointment is at 10:00 a.m. the port will happen at approximately at 10:20 a.m.
* Participant must turn off phone at time of port. Participant will receive a text message on new phone when port is complete. The porting process can take 4-24 hours to complete.
* Participants’ contacts can be transferred from their old phone by going to a corporate Verizon store and requesting assistance. Julie to email list of corporate stores to ARL staff.
* If participant does not complete the study and returns the phone, ARL is to request a number change for the device and then suspend service if necessary.
* Verizon cannot directly pay any cancellation fees when porting Verizon or non-Verizon customers. ARL to work with Susan A. to complete PIR process/Non-Employee Reimbursement process to pay participants for fees associated with cancellation of phone lines.

**Reimbursement for Fees associated with Porting**

* Participants who will be charged a cancellation/termination fee **will be able to port their number** before paying the fee, however they will not be able to be reimbursed by us in advance. They will have to pay the fees first, and then submit proof of bill payment to us for reimbursement.
* Participants who **owe money** on their device **will not be able to port their number** until they pay off their device. Once they pay off their device the phone can be ported, and they can submit proof of payment to us for reimbursement.

**Porting at Study Completion**

* Participants who want to stay with Verizon should contact Customer Care (1-800-922-0204) to transfer service to individual account. Customer Care will then contact Kathy/Cellular Services. The call should happen between the hours of 8:00 am-3:30 p.m.
* Participants who want to transfer service to another provider will visit the desired provider’s store and work with staff to transfer their service. The provider will contact Verizon, who will then have to contact Kathy to release the phone for transfer. The visit should happen between the hours of 8:00 a.m.-3:30 p.m.
* ARL was encouraged to suspend unused lines as opposed to canceling them. Lines can be unsuspended when needed for a study participant. Lines can initially be suspended for 90 days. Upon special request a line can be suspended for an additional 90 days.
* Study participants may not be able to transfer their service back to the iPhone given to them as compensation for study participation if they have a prepaid service as iPhones are not utilized for prepaid service accounts.
* Study participants may not be able to use the iPhone after study completion if Verizon is not their cell phone service provider as the cell phone is likely to be “locked.” If another cell phone carrier is able to process the phone as “unlocked” the participant may be able to continue utilizing the iPhone with another cell phone provider.

**Misc.**

* Once phone is activated, it must remain active for 6 months before the service can be terminated. The six-month timeline will begin the day the phone is activated not the day the phone is purchased.
* The phone must be active for 30 days before a new number can be ported-in to the phone line to qualify for the bill incentive credit.
* When submitting purchasing requests, email Susan A. who will then approve and forward them on to Cellular Services. If Susan A. is out, Candace will email Marsha Stanek and Elizabeth Rose the purchasing request.

**Post Meeting Action Items**

* Kathy to email meeting participants written guideline for “day of” porting procedures.
* Kathy to block international calling on all future ACHESS Study phone orders.
* Kathy to create subaccount for all phone lines associated with the Addiction Research Lab (ACHESS Study and Smoking Study).
* Kathy and Julie to set-up Verizon Portal access for Candace, Susan A., and Susan S. Candace and Susan S. will have full access. Susan A. will only have access to billing.
* Julie to send portal access information guide via email to Candace, Susan A., and Susan S.
* Julie to send link to check phone porting eligibility status.
* Julie to email list of corporate Verizon stores to ARL staff.
* Candace to return damaged ACHESS Study Phone for repair. Email Kathy for guidance on what steps to take to have device repaired.