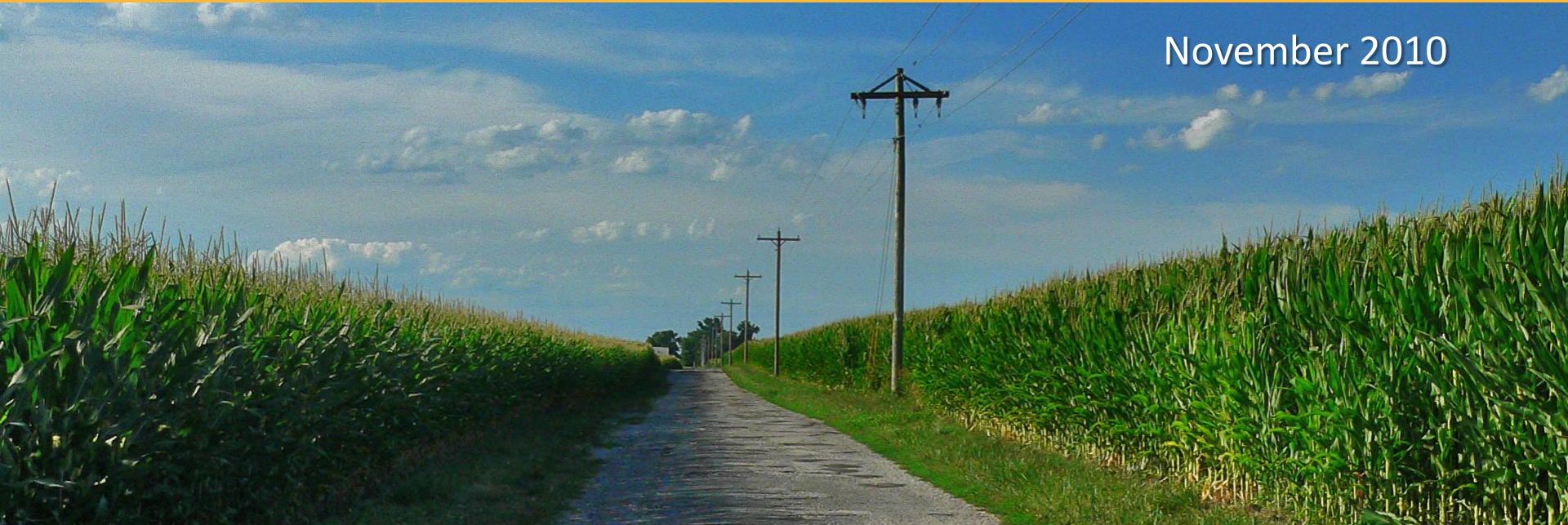


Low Income Program

Best Practices

November 2010



- Advertising and Outreach
- FCC Form 497
- Certification and Verification
- Recordkeeping

Best Practices

Advertising and Outreach

Traditional outreach methods:

word of mouth

**third-party
agencies**

brochures

bill inserts

**television
advertisements**

**radio
advertisements**

newspapers

newspapers: non-
english speaking
audience

pennysavers

Non-Traditional outreach methods:

enroll **social service agency** customers

canvas neighborhoods with high levels of eligible customers

establish relationships (community schools & public housing directors)

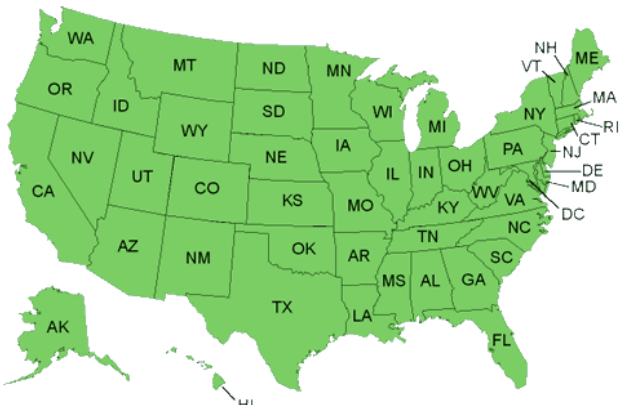
cash incentives for employees & social service agencies

provide applications at **lower income venues** (municipal events, fairs, etc.)

use **social media** tools


USAC's consumer website, lifelinesupport.org

- State specific eligibility criteria
- Carrier specific process
- Appropriate contact
- Applications when
- ETCs can post the Online Posting Tool

Low Income	Low Income Households	Familias de Bajos Ingresos	Telecommunications Carriers
<p>About Low Income:</p> <ul style="list-style-type: none"> • Overview of the Program • Overview of the Process • Site Visits • Understanding Audits • Filing Appeals • Training Events <p>Low Income Tools:</p> <ul style="list-style-type: none"> • Latest News • Calendar/Reminders • Required Forms • Disbursement Data • Rules and Orders • Tips and Best Practices • Frequently Asked Questions • Program Compliance - Whistleblower Hotline • Submitting A Complaint 	<p>Telephone Assistance Programs for Low Income Households</p> <p>Lifeline, Link Up, and Toll Limitation Service (TLS) help keep Americans connected by making basic, local telephone service more affordable for more than 7 million Americans. For information about applying for these discounts, click on your state in the map below or contact your phone company directly. Please note, not all companies that offer Lifeline, Link Up, and TLS are listed.</p> 		

Subscribe to the HCLI Newsletter

- Filing deadlines
- Program changes
- Tips & best practices
- Common audit



June 2008
www.usac.org

High Cost & Low Income News

Helping Keep Americans Connected

The USAC Connection High Cost & Low Income monthly newsletter will give you information about upcoming program deadlines, tips to help you ensure timely and proper filings, and other timely information.

Registration Open for High Cost/Low Income Training Sessions in Chicago, Denver, and Dallas

USAC is holding one-day training events in Chicago, Denver, and Dallas for companies that participate in the High Cost and Low Income Programs. The trainings provide guidance on program rules, audits, and support payment calculations. Training dates are: **July 22, 2008** in [Chicago, IL](#); **September 10, 2008** in [Denver, CO](#); and **November 19, 2008** in [Dallas, TX](#).

More details on who should attend, topics covered, training registration, and hotel accommodations can be found at [High Cost Training Events](#) or [Low Income Training Events](#).

High Cost Program

IAS Annual Self-Certification Due June 30, 2008

Each price-cap carrier, and CETCs serving lines in the service area of a price-cap carrier, must file an annual self-certification **by June 30, 2008** with USAC and the FCC in order to receive Interstate Access Support (IAS) for the upcoming program year (July 1, 2008 to June 30, 2009).

An IAS self-certification sample letter can be found on the [High Cost Forms](#) page and may be filed by an authorized representative for the carrier. After you file, go to the [Certification Search](#) page to see if your

IMPORTANT DATES AND REMINDERS

June 30—IAS Line Counts due (report as of 3/31/08)

June 30—IAS Self-Certifications due at USAC & FCC

June 30—ICLS Self-Certifications due at USAC & FCC

July 31—HCL, LSS, HCM, ICLS Line Counts due

ICLS Annual Self-Certification due June 30, 2008

Each rate-of-return carrier, and CETCs serving lines

Best Practices

FCC Form 497

Use the online Form 497

- Layout similar to paper 497
- Users can upload one form or multiple
- Identifies and explains errors

Contact	Lifeline	Link Up	Toll Limitation Services(TLS)	Certify
SPIN	143030852			
Serving Area	220387			
State Reporting	GEORGIA			
Company Name	WinSonic Digital Media Group Ltd.			
Data Month	May 2009			
Submission Date	05/15/2009			
Type Of Filing	Online			

Totals	
Total Lifeline Support	5100
Total Link Up Support	7918
Total TLS Support	360930
ETC Payment	373948

• Error occurred The range of the Lifeline support per subscribers Tier 2 is 0.00-1.75

Lifeline	# of Lifeline Subscribers	Lifeline Support per Subscriber	Total Lifeline Support
Tier 1 Low-income Subscribers receiving federal Lifeline Support	600	6.5	3900
Tier 2 Low-income Subscribers receiving federal Lifeline Support	600	2.0	1200
Tier 3 Low-income Subscribers receiving federal Lifeline Support	0	0.0	0
Tier 4 Low-income Subscribers receiving federal Lifeline Support	0	0.0	0

Check box to the right if partials or pro rate amount are used. Partial Used Amount 0

Total Lifeline Support 5100

Save Cancel Exit to 497 Search

Reminders

- Sign paper forms prior to submitting them
- Certify forms submitted online
- Make sure totals are accurate
- Only send forms one time (online, fax, email, mail) unless you have revisions
- Save a copy of your form
- Visit USAC's website, www.usac.org/li to reconcile your Form 497 with your disbursement

Best Practices

Certification and Verification

Customer Certification

- Follow procedures for each state in which you provide Lifeline
- Make your application easy to understand
- Make sure you have a customer's self-certification or proof of eligibility before providing the discount (will vary by state)
- Partner with a third party agency

Verification

- Follow procedures for each state in which you provide Lifeline
- Do not wait until June to contact your customers
 - Verification results due on August 31st
 - Verification process can begin on January 1st
- Partner with a third party agency
- Check USAC's website, www.usac.org/li to make sure we received your verification

Best Practices

Keeping Records

Keep all Lifeline related documents for **at least three years**, including:

- Customer bills
- Subscriber lists
- Relevant tariffs and price lists
- Proof of advertising
- Certifications from resellers
- Applicable state rules

Keep all customer self-certifications for as long as the customer receives Lifeline **PLUS** three years

- Certifications and verifications
- **DO NOT** keep copies of
 - customers' tax returns
 - Medicaid cards
 - SNAP card, etc.

GO GREEN!

- Keep electronic records instead of paper records
- Validate all paper records are scanned and saved before destroying them
- Make sure vendors are maintaining records adequately



Tanea Foglia
Manager, Low Income Program

To learn more, visit:

www.usac.org/li