

September 2020 Monthly Webinar: National Verifier Recertification Training

September 9, 2020

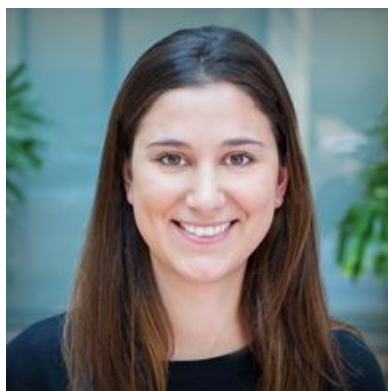


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Administrative Co.

Housekeeping

- Audio is available through your computer's speakers
- The audience will remain on mute
- **Enter questions at any time using the “Questions” box**
- If your audio or slides freeze, restart the webinar
- **A copy of the slide deck is in the “Handouts” section of webinar panel**

Today's Presenters



Tiffany Brady



Linnita Hosten



Leah Sorini

Agenda

- COVID-19 Response
- Recertification Background
 - **NEW** Recertification Process
 - Portal Changes
 - Report Changes
 - Recertification Methods
 - Recertification Outcome
 - Automatic De-Enrollment
- Form 555
- FAQs
- Resources

COVID-19 Response

COVID-19 Response

Temporary Program Changes (1/2)



The FCC and USAC suspended certain rules and processes through **November 30** to ensure existing Lifeline subscribers are not involuntarily removed from the program during the pandemic:

- Recertification
- Reverification
- General de-enrollment requirements, except de-enrollment at the user's request
- Usage requirements
- USAC program integrity reviews

COVID-19 Response

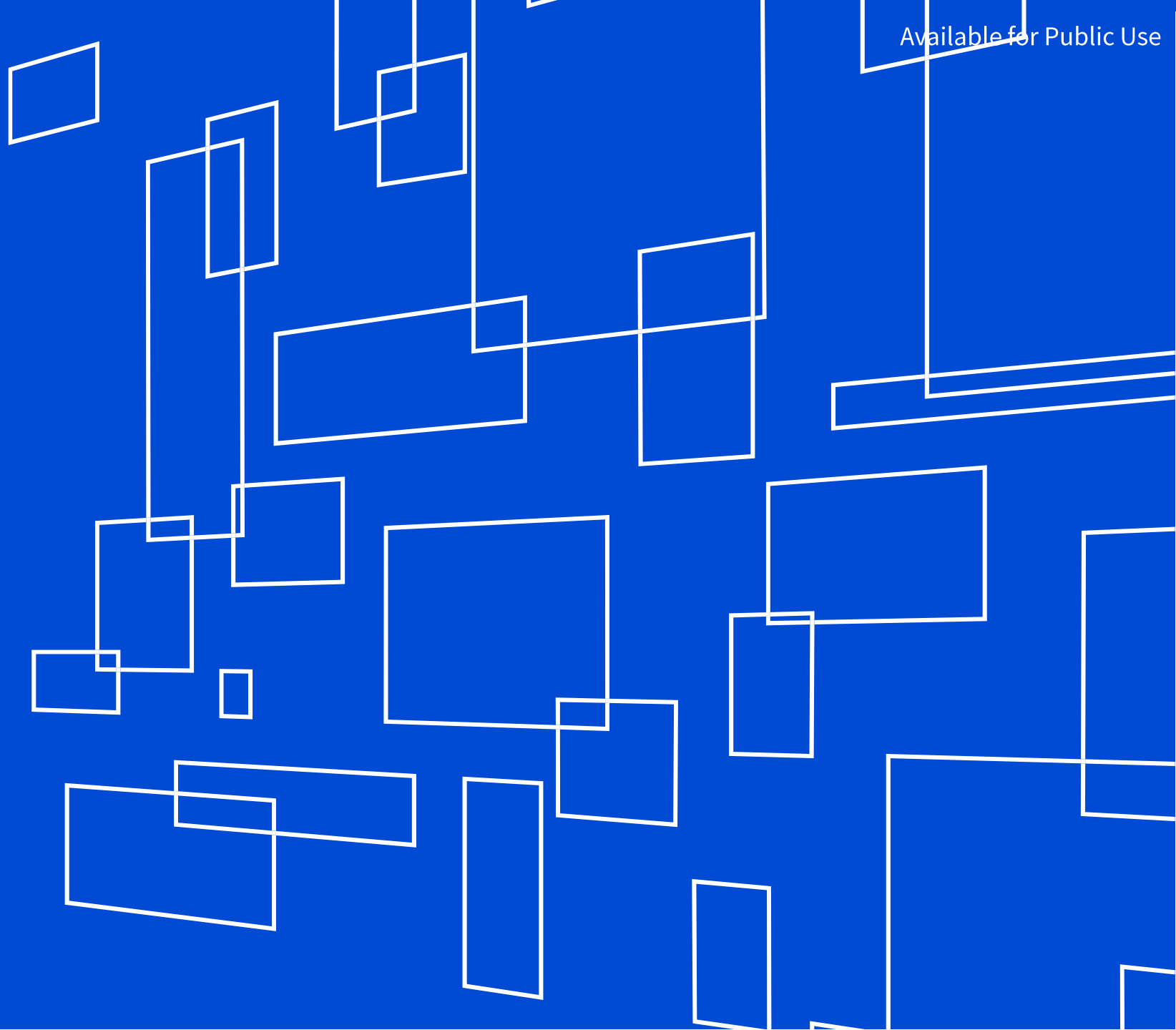
Temporary Program Changes (2/2)

The FCC and USAC adjusted certain [documentation requirements](#) through **November 30** to make it easier for those hardest hit by the pandemic to apply:

- **Proof of Income:** Consumers who do not have three consecutive months of income documentation may provide other official documentation
 - Notice of unemployment benefit payments
 - Notice of a successfully submitted application for unemployment benefits
- **Proof of Identity:** USAC will accept expired driver's licenses or state identification cards when needed to complete a Lifeline application, as long as the identification expired on or after March 1, 2020
- **Relief for rural, Tribal consumers:** Consumers living in rural areas on Tribal lands may begin receiving service even if they are still in the process of providing any necessary documentation to confirm their eligibility
 - Consumers who enroll through this waiver process will have **45 days** to provide the required documentation

For more information, visit USAC's [Lifeline COVID-19 Response](#) page

Background Recertification



Recertification Process

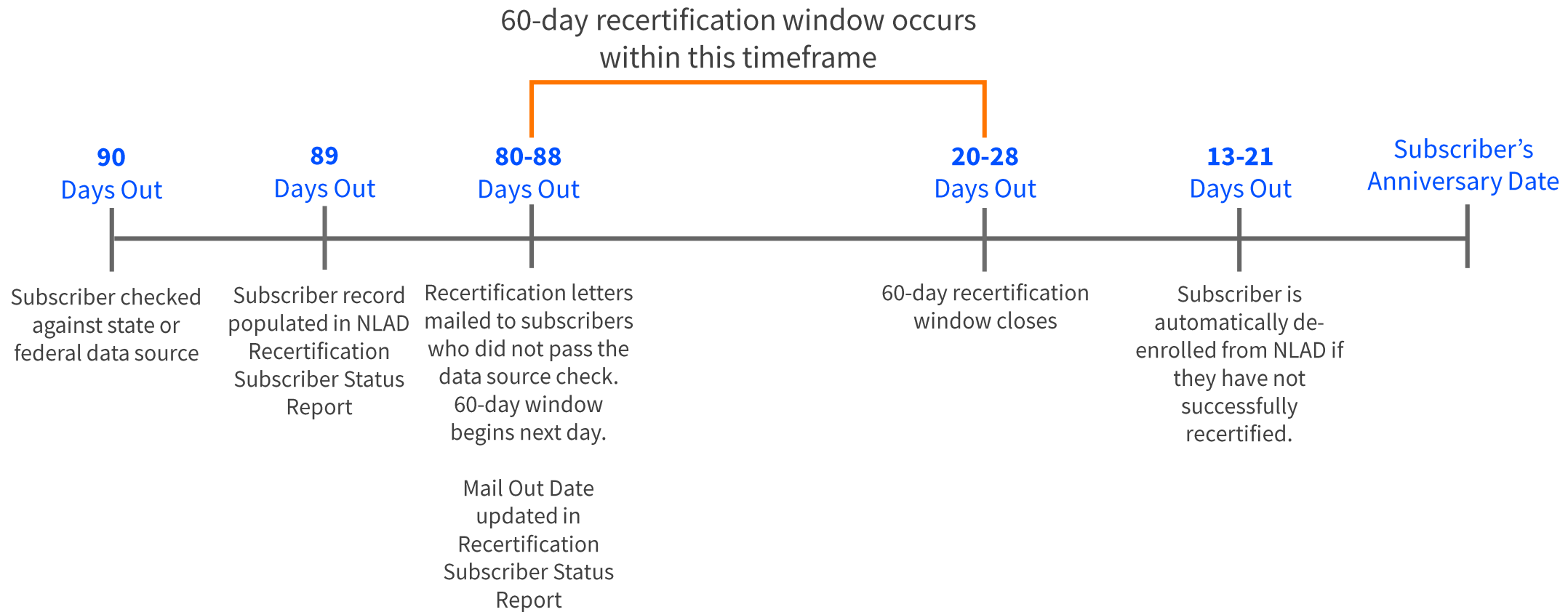
Overview

- Recertification is an annual requirement for Lifeline subscribers. It is separate from reverification (one-time National Verifier process)
- The National Verifier recertification process starts 90 days before a subscriber's anniversary date in NLAD
- Recertification checks are conducted every day
- 60-day recertification windows are initiated every business day

Note: Recertification requirements are temporarily paused through **November 30, 2020**. However, the automated eligibility database checks for recertification will continue throughout the waiver period.

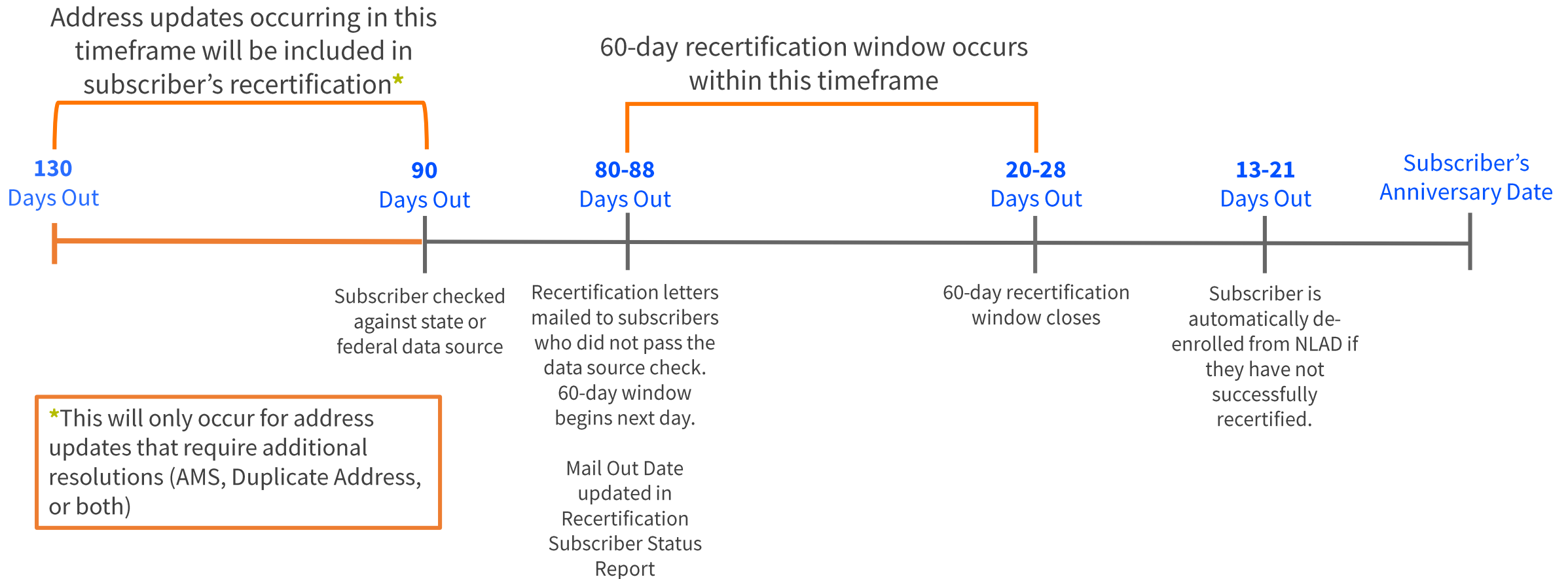
- When the [extended FCC waiver](#) ends, USAC will conduct outreach to subscribers who did not pass the automated checks and are required to recertify their continued eligibility.

Recertification Process Timeline

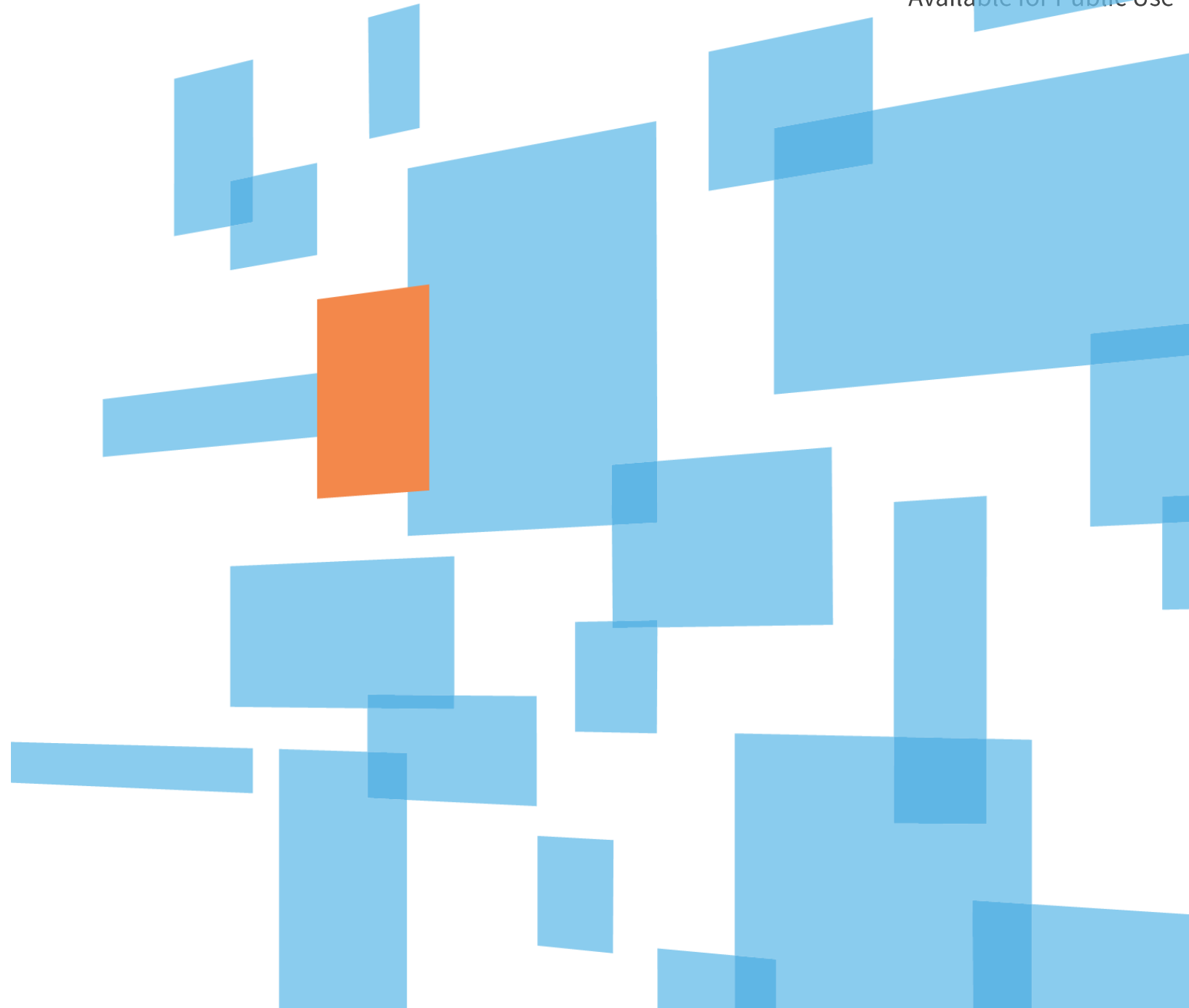


Recertification Process

Address Update within Recertification Timeline



New **Recertification** **Process**



Recertification Process

New Process

- Every subscriber in National Verifier recertification will go through an initial automated data check that will check the subscriber's eligibility.
 - Subscribers who **pass** the check do not need to take any action to retain their Lifeline benefit
 - Subscribers who **fail** the check are required to complete a recertification form
 - **NEW!** Subscribers who **fail** the current recertification check, but **passed** their previous (most recent) automated eligibility check are now required to provide proof of eligibility to complete their recertification.

Note: The new recertification requirements go into effect on October 13, 2020.

Recertification Process

Application Types

R-apps (RXXXXX-XXXXX) (EXISTING)

- Requires *only* completion of recertification form
- This is the same type of application that is currently in production today
- Available via the following methods:
 - NV Consumer Portal
 - IVR
 - Mail

D-apps (DXXXXX-XXXXX) (NEW!)

- Requires completion of recertification form and proof documentation
- May require documentation for one or more resolutions, including program/income eligibility, AMS, and Duplicate Address
- Available via the following methods:
 - NV Consumer Portal
 - NV Service Provider Portal
 - NV Carrier API
 - Mail

*IVR **will not** be available for D-applications since documentation is required*

Recertification Process

Successful Recertification Eligibility Check



Jet's Example - No Action Required

Initiation

Jet is sent to the NV to check for recertification

Check

Jet is checked against federal/state data sources

Success

Jet **passes** the automated recertification check and successfully recertifies

Recertification Process

R-Applications



Kay's Example – Self-Certification Required

Initiation

Kay is sent to the NV to check for recertification

Check

Kay is checked against federal/state data sources

Error

Kay **fails** the automated recertification check

Previous Outcome

Kay **failed** previous federal/state database check

Self-Certification Required

Recertification Form

Recertification Process

D-Applications



Darryl's Example – Documentation Required

Initiation

Darryl is sent to the NV to check for recertification

Check

Darryl is checked against federal/state data sources

Error

Darryl **fails** the automated recertification check

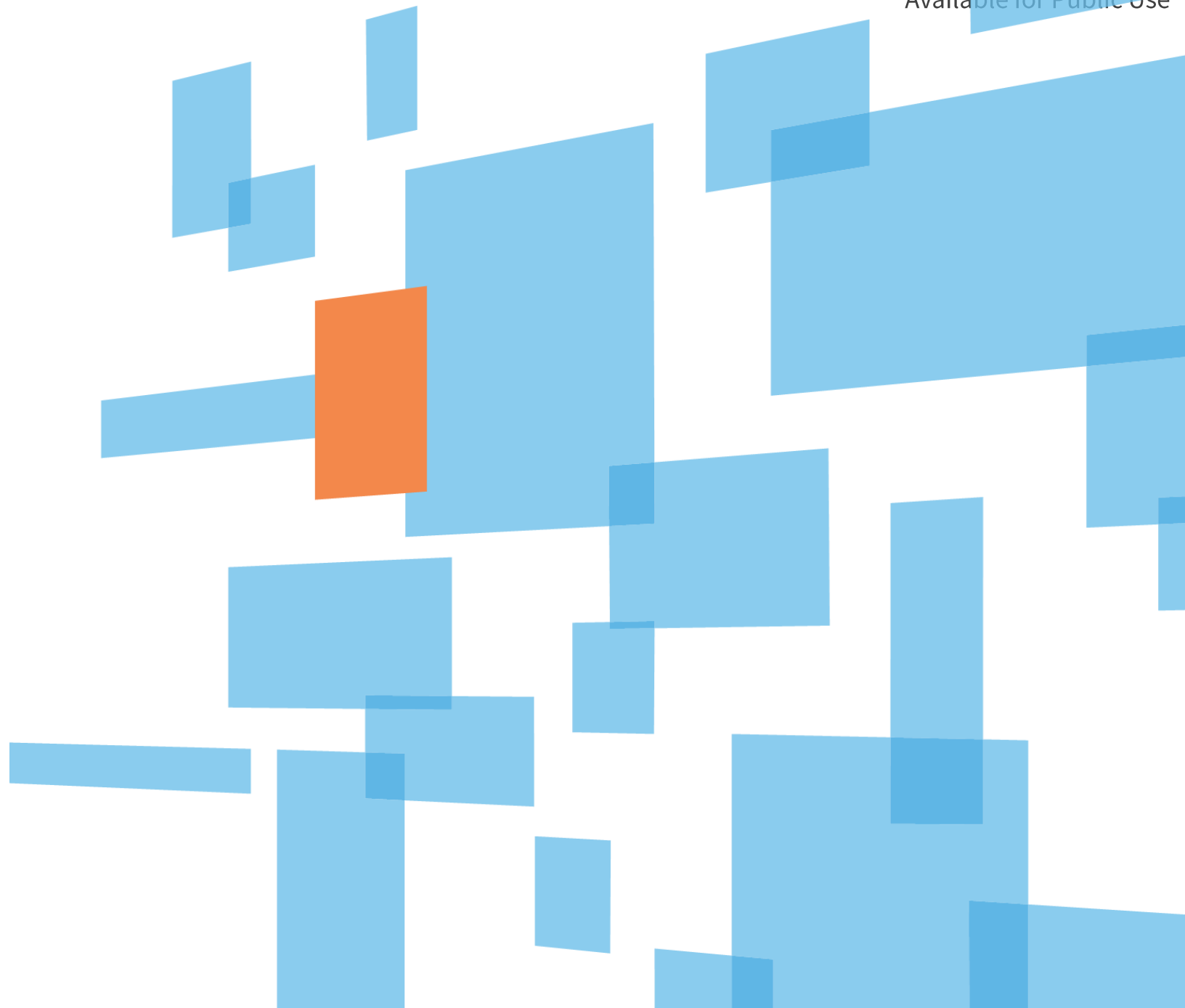
Previous Outcome

Darryl **passed** the previous federal/state database check

Documentation Required

- 1) Recertification Form
- 2) Proof Documentation
(Eligibility and/or Address Resolution)

Portal Changes



Recertification Process Portal Changes

- Service providers may use the NV service provider portal to assist a subscriber in completing the recertification requirement for applications requiring additional documentation (D-Application)
- After entering in the subscriber's identity information, the service provider will be informed that the subscriber is undergoing recertification

The following Lifeline subscriber is currently undergoing recertification. We were not able to automatically verify their eligibility and need some more information from them to complete the annual recertification process.

If they would like to transfer their service to another internet/phone provider, they will be able to submit a new Lifeline application after completing recertification.

Full Legal Name: **SP Cover Page Mockup**
Application ID: **D67642-82598**

Please click "Next" to continue.

Next

Need Help? Use this information and call the Lifeline Support Center at 1-800-234-9473.

Recertification Process

Portal Changes

- Service providers will see a revised *We Are Checking Their Documents* page that notes the following:
 - The service provider's next steps if the subscriber passes the automated recertification check
 - The service provider's next steps if the subscriber no longer qualifies for the Lifeline Program

Note: In the consumer portal, subscribers will see a revised *We Are Checking Your Documents* page that notes the subscriber's next steps.

We Are Checking Their Documents

We need to check their documents to make sure they still qualify for Lifeline.

This will take a few minutes.

The Lifeline Support Center hours are 9 a.m. - 9 p.m. ET, Monday-Sunday. If you're using the system outside of those hours, the subscriber's record will be updated within a few business days.

If they still qualify...

You do not need to do anything else. This subscriber will have completed recertification. If they would like to transfer their service to another internet/phone provider, they will be able to submit a new Lifeline application.

If they no longer qualify...

We'll ask you for more information or tell you what to do next. **You will have until 6/15/2020 (Based on US Eastern Time)** to show they still qualify for Lifeline.

Need help? Use this information and call the Lifeline Support Center at 1-877-524-1325

Full Legal Name: **SP Pending Review Mockup**
Address: **123 SP FLOW,
MOCKUP, UT 12345**
Application ID: **D67642-82598**

[Return to Homepage](#)

Recertification Reports

Recertification Reports

NLAD Updates

- USAC has implemented modifications to the **Recertification Subscriber Status Report**:
 - Previous NLAD reports were generated by the recertification check start date
 - Reports can now be generated by **anniversary date**
 - Field headers are more descriptive
 - New fields have been added
- Minor text updates have also been made to the **Failed Recertification De-enroll Report**

Recertification Reports

NLAD

- Service providers will be able to see which subscribers are currently undergoing recertification via the **Recertification Subscriber Status Report**, which is available in NLAD
- After the subscriber has been checked against an automated data source, service providers will be able to see the following information at the subscriber level:

EXISTING

- Outcome of data source check
- Mail out date (if required)
- Recertification deadline (if required)
 - Date will be 60 days from the date the initial mailing is sent.
- Recertification method

NEW!

- Recertification status
 - (Recertified/In-Progress)
- Eligibility Docs Required
- Eligibility Docs Accepted
- Eligibility Docs Rejected Reason
- Address Resolution Required

Recertification Reports

Recertification Subscriber Status Report

RECERTIFICATION SUBSCRIBER STATUS REPORT [Instructions](#)

Select Filters

Will be able to select multiple SACs → **Select SAC(s)**

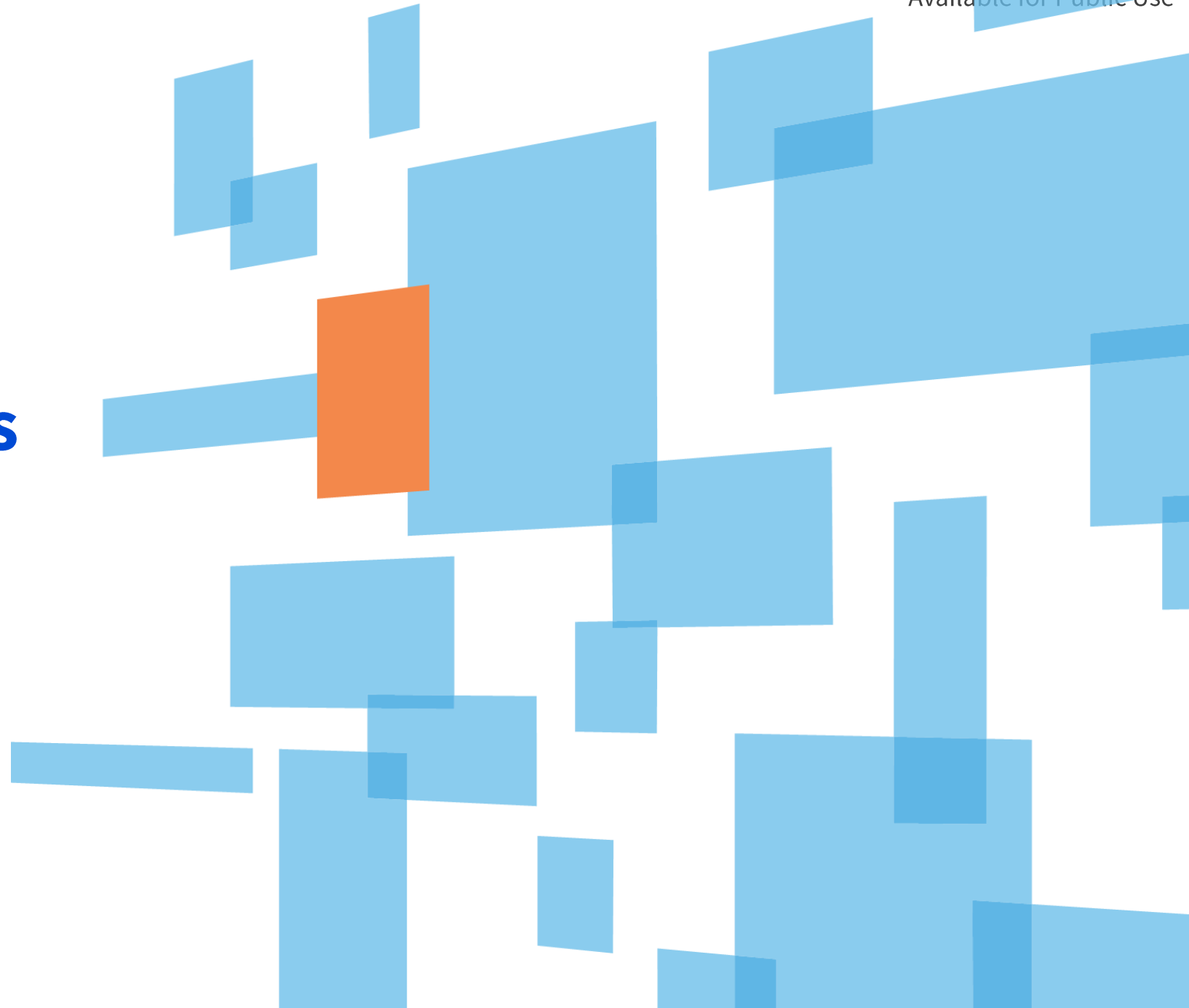
Anniversary- Start Date **Anniversary- End Date** ← **NEW! Search by a subscriber's anniversary date**

Status ☒ Recertified
☐ In Progress
☐ All (Recertification & In Progress) ← **Report can be sorted in three ways**

Select Report Format

☒ Display on web page (limited to first 500 responses)
☐ CSV file with each row containing selected data on a single subscriber

Recertification Process & Methods



Recertification Methods Overview

R-Applications



Paper Recertification Form



Interactive Voice Response (IVR)



Recertify Online

- NV Consumer Portal

D-Applications



Paper Recertification Form



Recertify Online

- NV Consumer Portal
- NV Service Provider Portal
- NV Carrier API

Recertification Method #1: Paper Form

- FCC Form 5630 Annual Recertification Form
 - Subscribers will receive a barcoded version of Form 5630 from USAC to submit via mail
- Subscribers *will not* receive written notice that their form was received
 - Subscribers can call Lifeline Support Center for status or service providers can reference the Subscriber Recertification Status Report in NLAD
- Full-size examples available on our website
 - [English form](#), [Spanish form](#)

FCC FORM 5630

Lifeline Program
Annual Recertification Form

OMB APPROVAL EDITION 3060-0819

FC Universal Service Administrative Co.

4. Agreement

I agree, under penalty of perjury, to the following statements:

You must initial next to each statement.

☐ Initial I (or my dependent or other person in my household) currently get benefits from the government program(s) listed on this form or my annual household income is 135% or less than the Federal Poverty Guidelines (the amount listed in the Federal Poverty Guidelines table on this form).

☐ Initial I agree that if I move I will give my service provider my new address within 30 days.

☐ Initial I understand that I have to tell my service provider within 30 days if I do not qualify for Lifeline anymore, including:

- 1) I, or the person in my household that qualifies, do not qualify through a government program or income anymore.
- 2) Either I or someone in my household gets more than one Lifeline benefit (including, more than one Lifeline broadband internet service, more than one Lifeline telephone service, or both Lifeline telephone and Lifeline broadband internet services).

☐ Initial I know that my household can only get one Lifeline benefit and, to the best of my knowledge, my household is not getting more than one Lifeline benefit.

☐ Initial I agree that my service provider can give the Lifeline Program administrator all of the information I am giving on this form. I understand that this information is meant to help run the Lifeline Program and that if I do not let them give it to the Administrator, I will not be able to get Lifeline benefits.

☐ Initial All the answers and agreements that I provided on this form are true and correct to the best of my knowledge.

☐ Initial I know that willingly giving false or fraudulent information to get Lifeline Program benefits is punishable by law and can result in fines, jail time, de-enrollment, or being barred from the program.

☐ Initial My service provider may have to check whether I still qualify at any time. If I need to recertify (renew) my Lifeline benefit, I understand that I have to respond by the deadline or I will be removed from the Lifeline Program and my Lifeline benefit will stop.

☐ Initial I was truthful about whether or not I am a resident of Tribal lands, as defined in section 2 of this form.

I consent to let USAC contact me at my Lifeline phone number for important reminders and updates to my Lifeline service. Message and data rates may apply. Text STOP to end messages.

Signature Today's Date

Page 5 of 7

Universal Service Administrative Company | www.usac.org
Need help? Call the Lifeline Support Center at 1-800-234-9473

Recertification Method #2: Interactive Voice Response (Only Available for R-Applications)

- Subscriber can complete recertification through an interactive voice response (IVR) system
- Subscriber calls IVR number and follows the prompts
 - English and Spanish language support available
- Takes 12-15 minutes to complete
- Subscriber finds out immediately whether they pass/fail
- ***Subscribers will need their Application ID (provided on the recertification letter) to enter the IVR***
 - *Application ID is also available on the Recertification Subscriber Status Report in NLAD.*



Recertification Method #3: Recertify Online

- Subscribers can recertify online via the [National Verifier web portal](#)
 - English and Spanish language support available
 - Instructions for recertifying online are provided in a letter to the subscriber
- Subscriber finds out immediately whether they pass/fail

Lifeline National Verifier

Qualify for Lifeline!

Lifeline is a federal benefit that lowers the monthly cost of phone or internet service. Qualifying is the first step to getting your Lifeline Benefit.

What is your state or territory?

AZ

Get Started If you do not want to qualify online, you can use a paper form. [↗](#)

Do you need to recertify?

If you already get Lifeline and received a notice that said you need to recertify, use the recertify button.

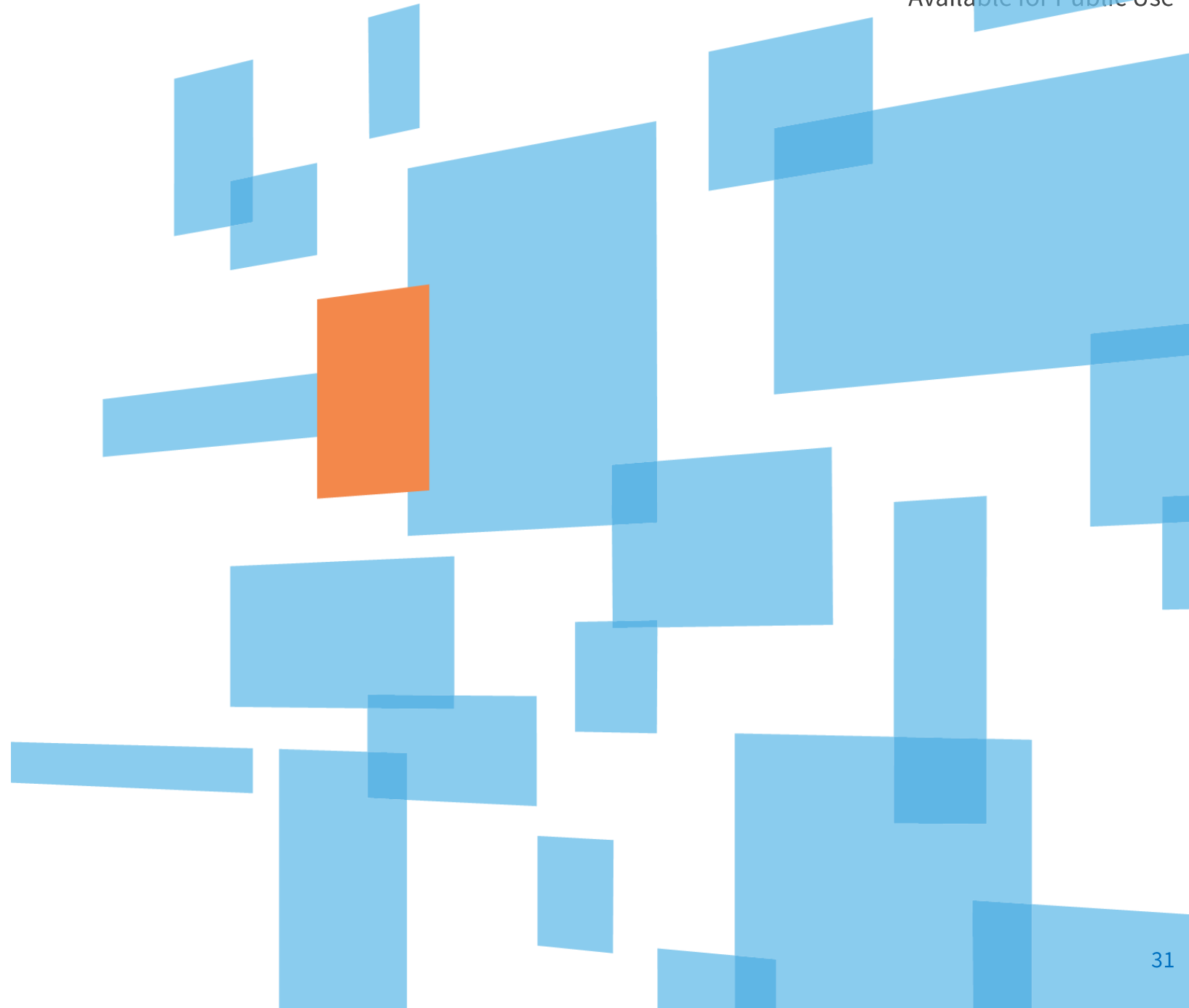
Recertify to keep Lifeline

Recertification

Outreach Via Pre-Recorded Messages & Postcards

- During the 60-day period, subscribers may receive up to three (3) pre-recorded messages and a reminder postcard.
 - Subscribers will receive scheduled reminders until they successfully recertify
- Pre-recorded messages inform subscribers:
 - That it is time to recertify their benefit,
 - The deadline to recertify, and
 - That they can continue immediately to recertify using the IVR (only available for R-Apps), recertify online (URL provided), or complete and return the mailed recertification form


Recertification Outcome



Recertification Outcome Notification from USAC

- Subscribers will be notified of their successful recertification status depending on how they choose to recertify. If a subscriber successfully recertifies within their window...
 - Via IVR or Web: Immediate confirmation after submission
 - Via Mail: A mailed notification will be sent shortly after the successful recertification attempt.

Only subscribers that are required to recertify will be given the outreach listed above



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Lifeline Support Center
P.O. Box 7081
London, KY 40362

Lifeline Program
Recertification Notice

RC-8001
APPLICATION_ID
[LETTER_DATE]

FIRST_NAME LAST_NAME
ADDRESS
CITY STATE ZIP_CODE

You Successfully Renewed Your Lifeline Benefit!

Dear FIRST_NAME LAST_NAME,

Thank you for responding to our Recertification request. USAC was able to renew your Lifeline benefit! You will continue to receive your Lifeline discount for another year.

Next Steps

If you are happy with the service you are getting, you do not need to do anything else.

If you need to change your service or want to cancel your benefit, contact your phone or internet company. If you do not know what company is giving you service, call us at 1 (800) 234-9473.

If you want to change your phone or internet company, contact the new company that you would like to transfer your benefit to. To find a new company, visit [LifelineSupport.org](https://www.LifelineSupport.org) and select **Companies Near Me** from the menu on the left.

Things to Remember

- **You will have recertify again, next year.** If you get a letter from the USAC Lifeline Support Center asking you to recertify, you must do so within 60 days, or you'll lose your Lifeline discount.
- **Use it or lose it.** If your Lifeline-supported service is free (your company doesn't send you a bill), use it at least once every 30 days. If you don't, you will get a 15-day notice to use it or it will get turned off.
- **Keep your contact information up-to-date.** If your address or eligibility status changes, notify your phone or internet company within 30 days.
- **Know your rights.** The full list of the Lifeline program's rules and your rights as a Lifeline subscriber is on our website: [LifelineSupport.org](https://www.LifelineSupport.org).

If you are not receiving your Lifeline discount on your monthly bill, or have questions about your service, please contact your phone or internet company.

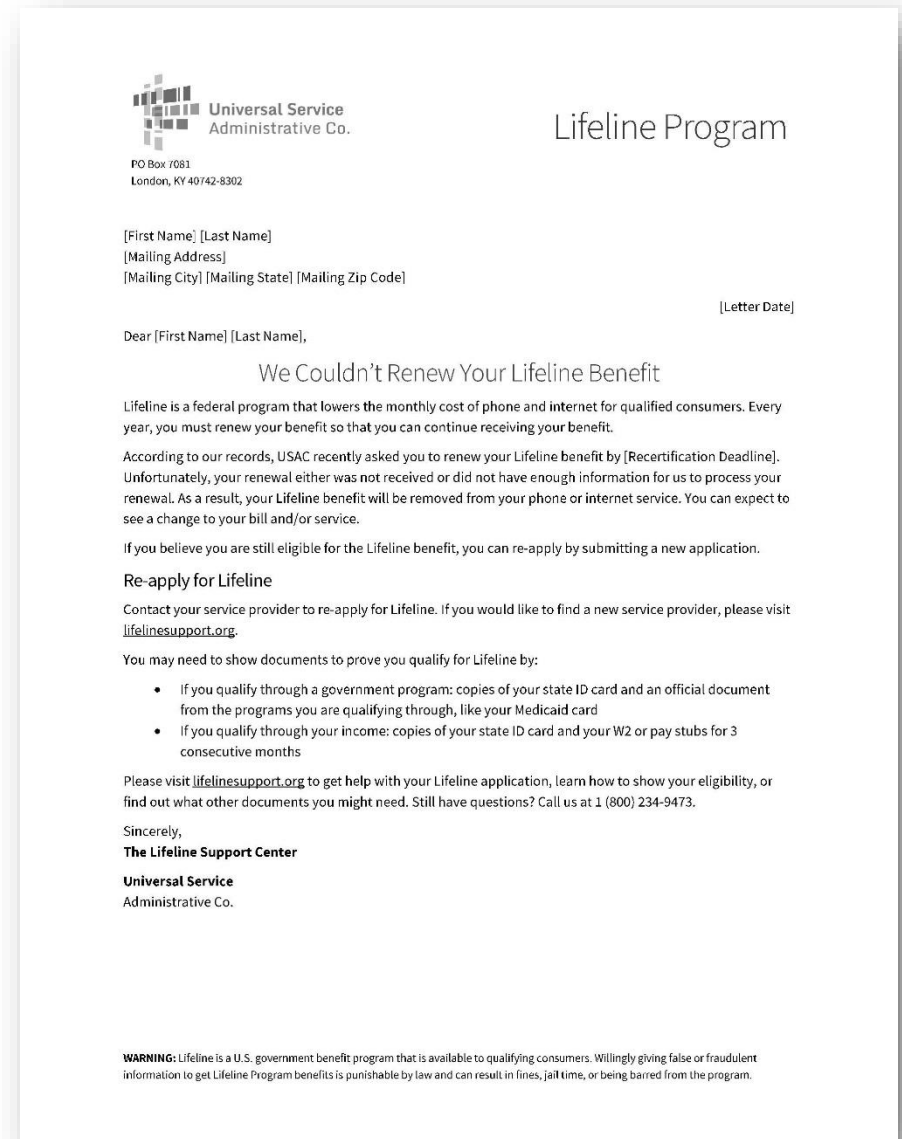
If you have any questions about the Lifeline Program, contact us at 1 (800) 234-9473 or visit [LifelineSupport.org](https://www.LifelineSupport.org).

Sincerely,
The Lifeline Support Center
Universal Service
Administrative Co.

WARNING: Lifeline is a federal benefit program that is available to qualifying consumers. Willingly giving false or fraudulent information to get Lifeline Program benefits is punishable by law and can result in fines, jail time, de-enrollment, or being barred from the program.

Recertification Outcome Notification from USAC

- If a subscriber *does not* successfully recertify within their window...
 - A mailed notification will be sent within 2-3 business days after a subscriber's window closes



Automatic De-Enrollment

Automatic De-enrollment NLAD

- If a subscriber does not successfully recertify by the end of their 60-day recertification window, they will be automatically de-enrolled from NLAD five (5) business days after their recertification window closes
- Service providers will be ***notified via an automated email*** (sent to ETC Administrator user role) of all de-enrollments for failed/non-responsive subscribers through the **Failed Recertification De-enroll Report** in NLAD
 - The email notification will indicate de-enrollments have occurred in one or more of the service provider's SACs and to check the Failed Recertification De-enroll Report for more information
- Service providers are still responsible for ensuring that subscribers that should be de-enrolled are not claimed for the Lifeline benefit

Automatic De-enrollment Failed Recertification De-Enroll Report

FAILED RECERTIFICATION DE-ENROLL REPORT

[Instructions](#)

Select Filters

Will be able to
select multiple
SACs

Select SAC(s)

Start Date End Date

Date when de-enrollment
transaction occurred.

Select Report Format

- ☒ Display on web page (limited to first 500 responses)
- ☐ CSV file with each row containing selected data on a single subscriber

[Report Home](#) | [Recertification Subscriber Status Report](#) | [Failed Recertification De-Enroll Report](#) | [Self Recertification Outreach Report](#)

Automatic De-enrollment

NLAD Reports Review

- **Recertification Subscriber Status Report**
 - *What date should you enter?* – Search by a subscriber's anniversary date or a range of anniversary dates.
- **Failed Recertification De-enroll Report**
 - *What date should you enter?* – The date the de-enroll transaction occurred. This will be the day you receive the automated email from NLAD

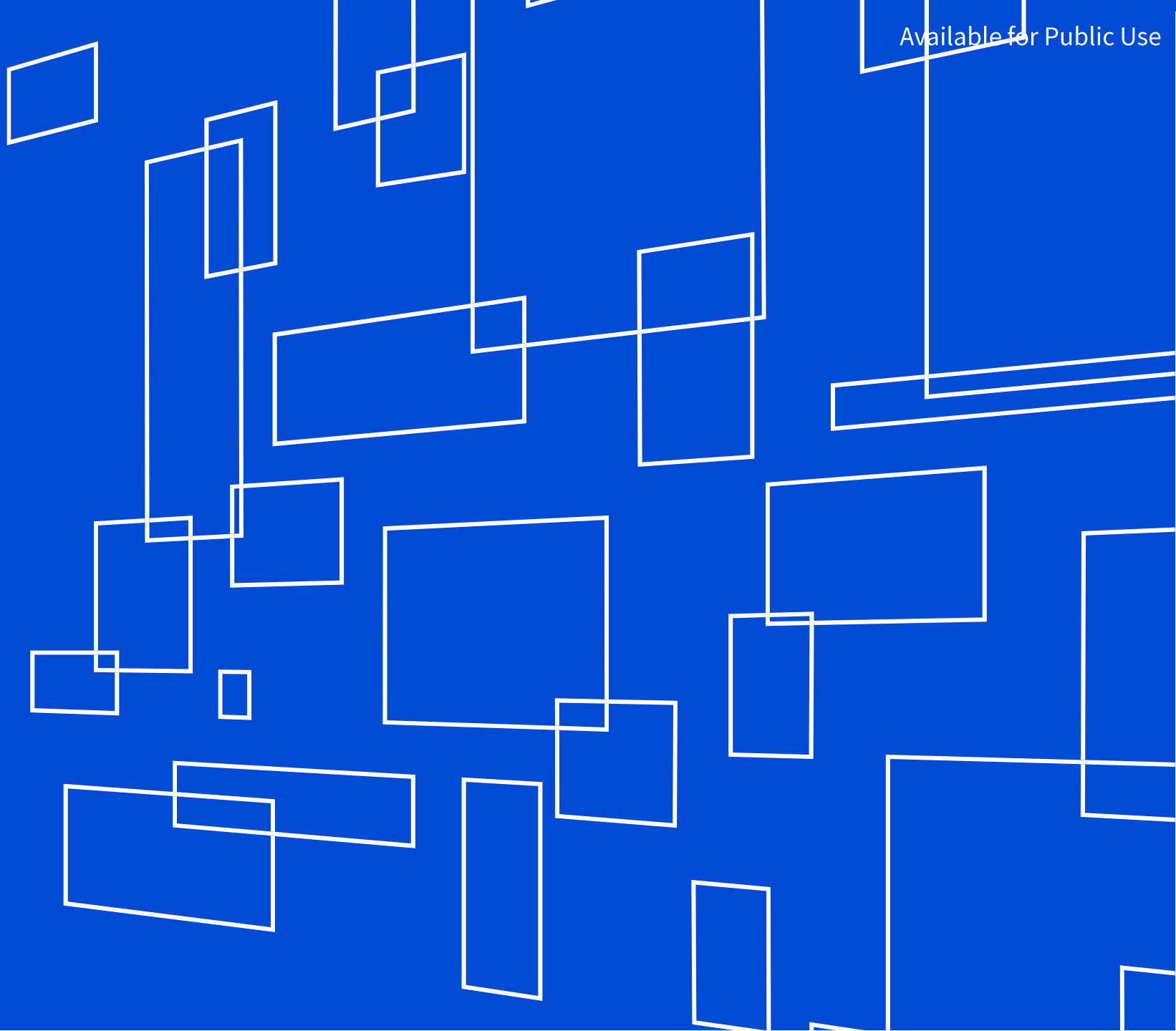
Questions?

FCC Form 555

FCC Form 555 Reporting

- Recertifications that are conducted by the National Verifier do not need to be recorded in a service provider's FCC Form 555
- **You will still be required to submit the FCC Form 555 for each SAC**, but will not need to include any National Verifier recertification data

FAQs



FAQs

- **Will a service provider be able to determine the recertification requirements for a subscriber *before* their application is created?**
 - No – after a recertification application is created, the NLAD report will notify the service provider of the requirements for that application.
- **Can service providers reach out to subscribers to inform them about USAC and the recertification process?**
 - Yes – service providers may educate their subscribers about who USAC is, why we are reaching out to them, and the recertification process.
 - Service providers **should not** provide or estimate deadlines as these are subject to change.

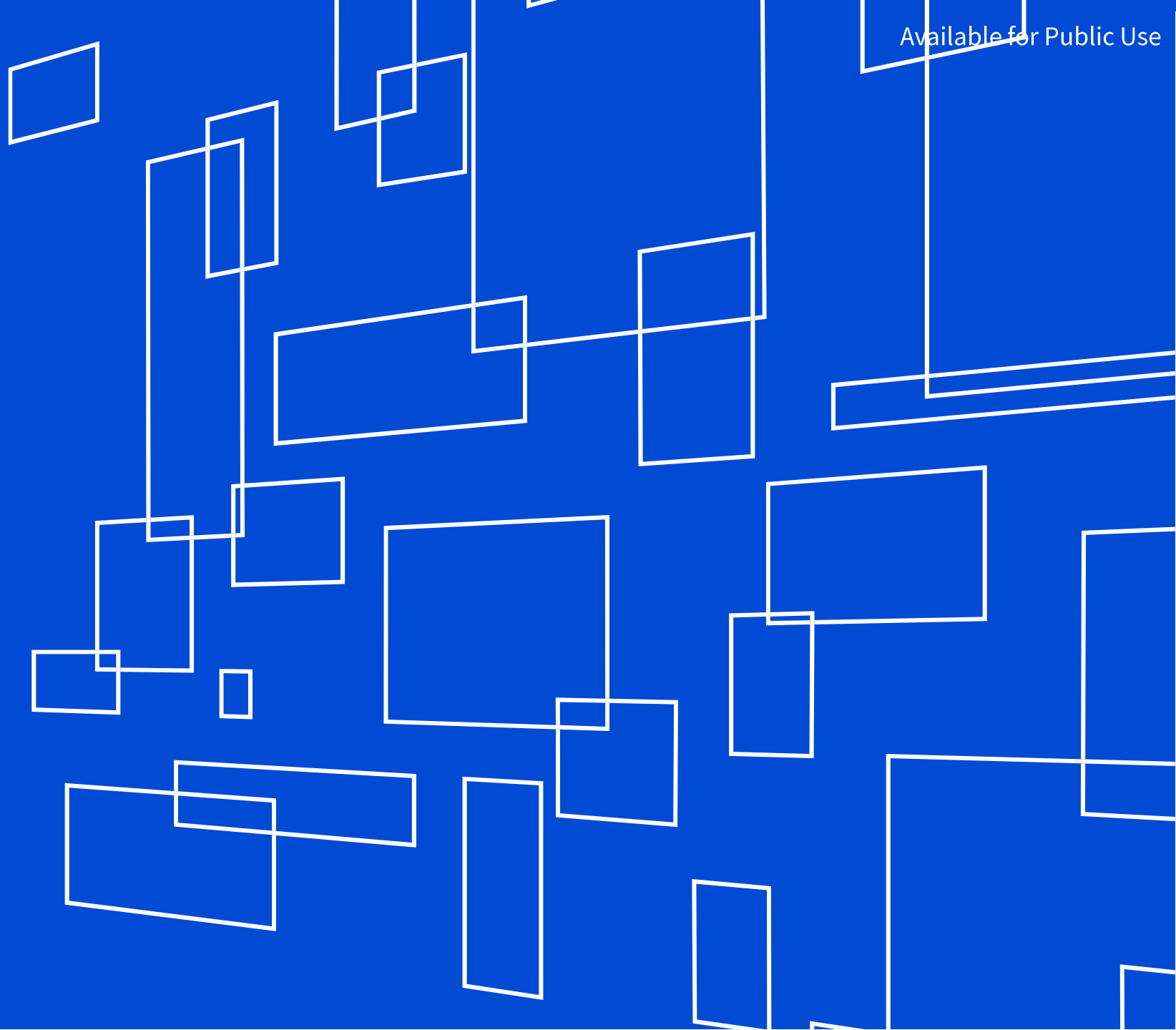
FAQs

- **Can I recertify my subscribers and enter the results into NLAD?**
 - No – subscribers going through National Verifier recertification must complete their recertification through one of the recertification methods or they will be de-enrolled from the Lifeline program.
- **If a subscriber attempts to recertify and they fail, can they attempt to recertify again?**
 - Yes – subscribers will have an unlimited number of attempts to recertify during their 60-day window.

FAQs

- **What happens if a subscriber passes recertification but needs to complete an Address Resolution?**
 - An Address Update application (A-app) will be created. The subscriber will be placed in the standard Address Update timeline.
- **What happens if a subscriber's address is changed while they have an open recertification application?**
 - Address updates that occur while a subscriber has an open recertification application will not begin until recertification ends.

Resources



Resources

Lifeline Support

The Lifeline Support Center continues to operate and provide support. We will communicate with you as soon as possible if anything affects our operations.

- **Service provider inquiries, email:**
LifelineProgram@usac.org
- **Consumer inquiries, email:**
LifelineSupport@usac.org

By phone:

- 1 (800) 234-9473
- Agents available 7 Days a Week,
9 a.m. to 9 p.m. ET

By mail:

Lifeline Support Center

PO Box 7081

London, KY 40742

Resources

Upcoming Training Dates

Recertification Office Hours

- October 8, 2020: Open forum for service providers

Questions?

Learn More about Lifeline

- Sign up for Lifeline Program email updates and upcoming events
 - Visit usac.org and click “subscribe” in the upper-right corner
- Need help? Contact us!
 - General: LifelineProgram@usac.org



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