

National Verifier Recertification October 2018 Launch

Lifeline Program

June 25, 2019



Universal Service
Administrative Co.

Housekeeping

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- A copy of the [slide deck is available](#) for download
 - It's in the "handouts" section of your GoToWebinar control panel
- The audience will remain on mute
- Enter questions at any time using the "Questions" box
 - There is a large audience signed in today. We will accept as many questions as possible!
- If your audio or slides freeze, refresh the webinar

Today's Presenters



Kevin Risser



Leah Sorini

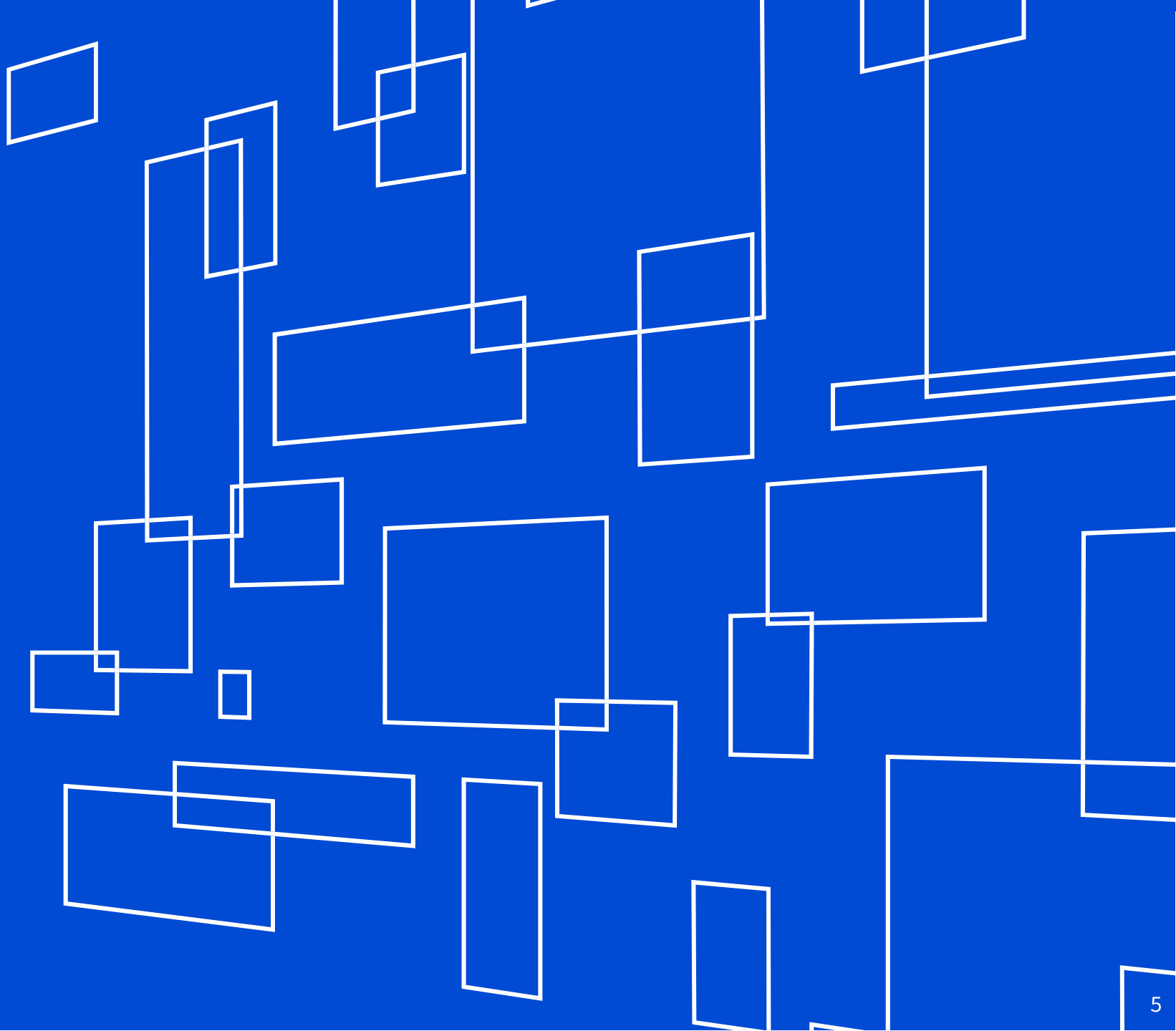


Nelson Cruz

Agenda

1. Background
2. Recertification Process
 - Automated Data Source Check
 - Self-Certification Process & Methods
 - Automatic De-enrollment
3. Form 555
4. FAQs

Background Recertification



Rolling Recertification

- The [2016 Lifeline Order](#) requires that subscribers be recertified **on a rolling basis**, which is referred to as “rolling recertification”
 - Subscriber’s eligibility is verified by their Lifeline anniversary date
 - USAC recertified subscribers in one-month batches
- The “anniversary date” is every 12 months from the service initiation date
 - Visible in NLAD (not an editable field)

Recertification and Reverification

- Recertification is an annual requirement for Lifeline subscribers, it is separate from reverification (one-time National Verifier process).
- Subscribers will only be due for recertification **after** they have successfully completed reverification or if they enrolled through the National Verifier.
- A subscriber **cannot** be in both recertification and reverification. However, you may have some subscribers in recertification and some subscribers in reverification because the October 2018 launch reverification process is not yet complete.

When will National Verifier Recertification start?

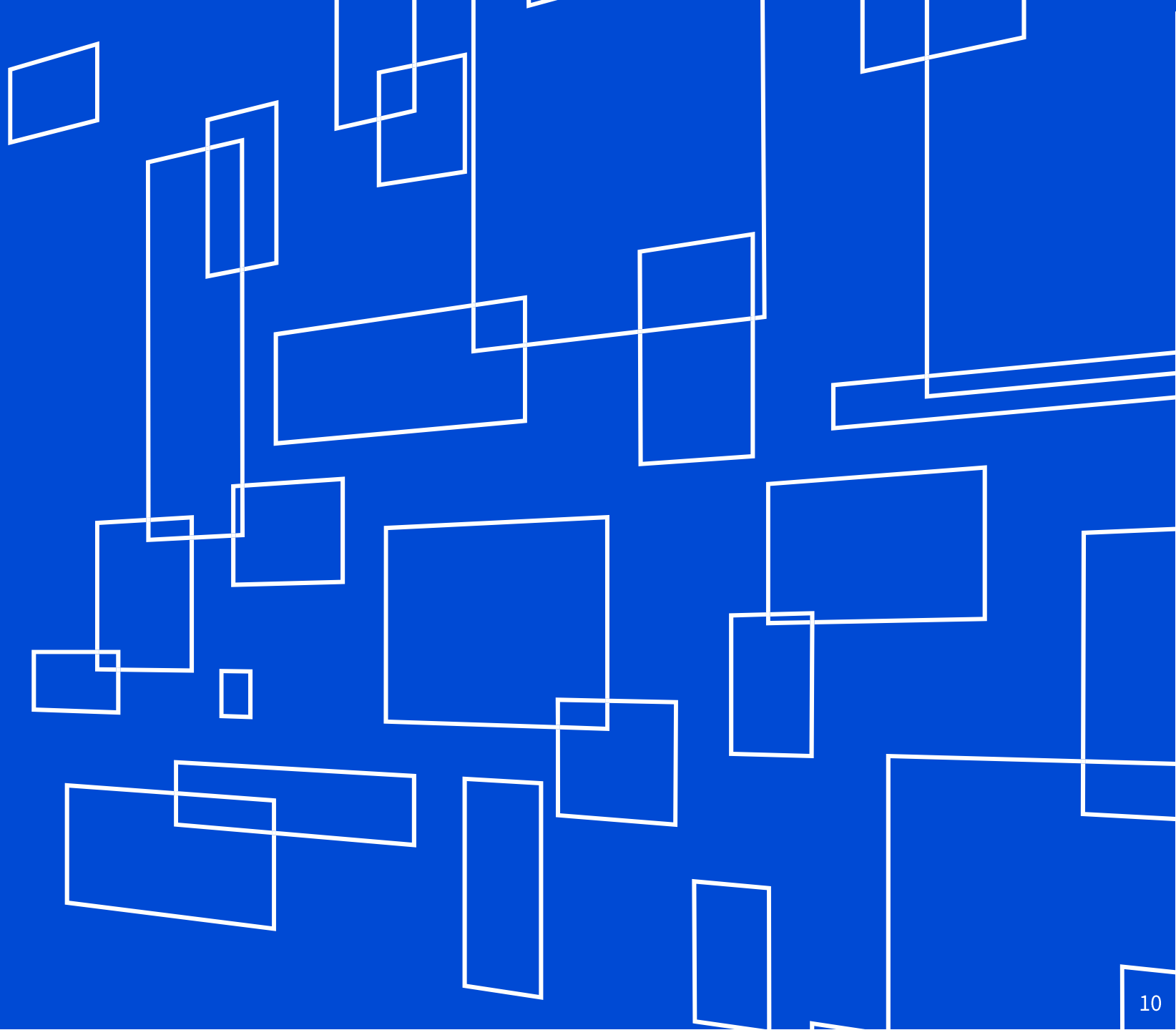
- Recertification for subscribers in October 2018 launch states (Guam, Hawaii, Idaho, New Hampshire, North Dakota, and South Dakota) will **begin in mid July.**

Who is due for Recertification?

- The subscribers that will begin recertification in **mid July** have anniversary dates in **October**. These subscribers have anniversary dates for one of the following reasons:
 - Successfully *reverified* their eligibility. The subscriber's anniversary date will be one year from the date the subscriber successfully reverified.
 - Enrolled in the Lifeline program via the National Verifier on October 15, 2018 or later.

**USAC will be removing the anniversary date for any subscriber in an October 2018 launch state that is still undergoing reverification.*

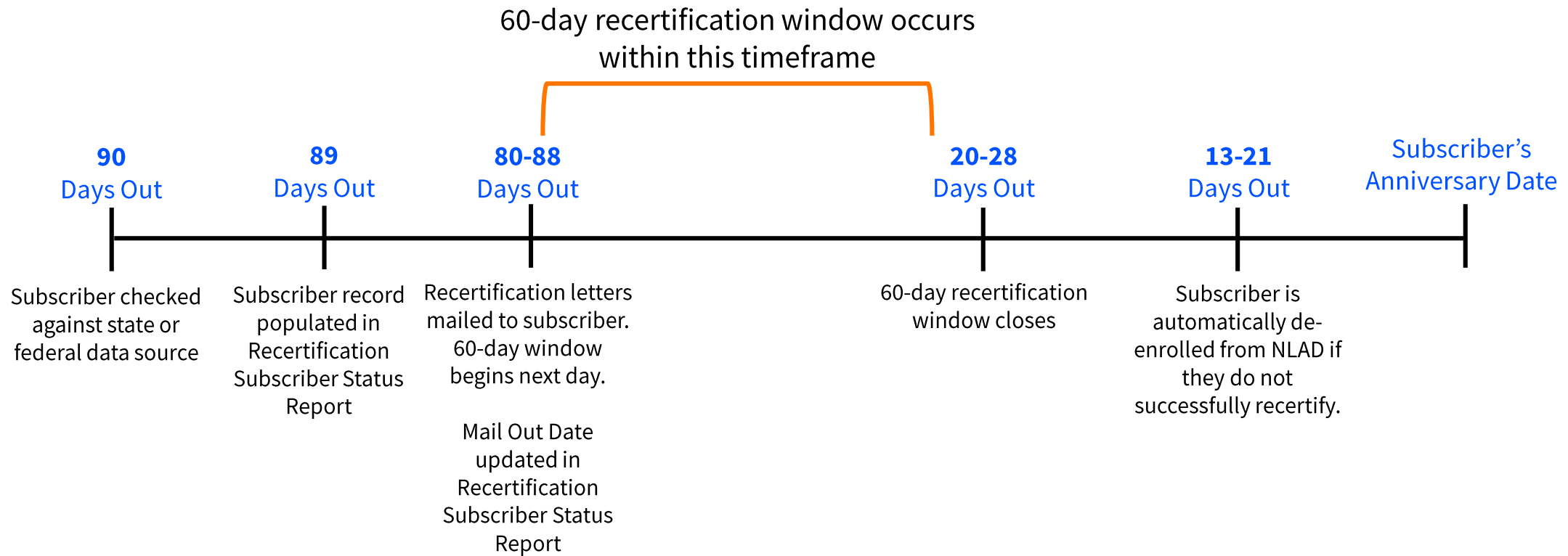
Recertification Process



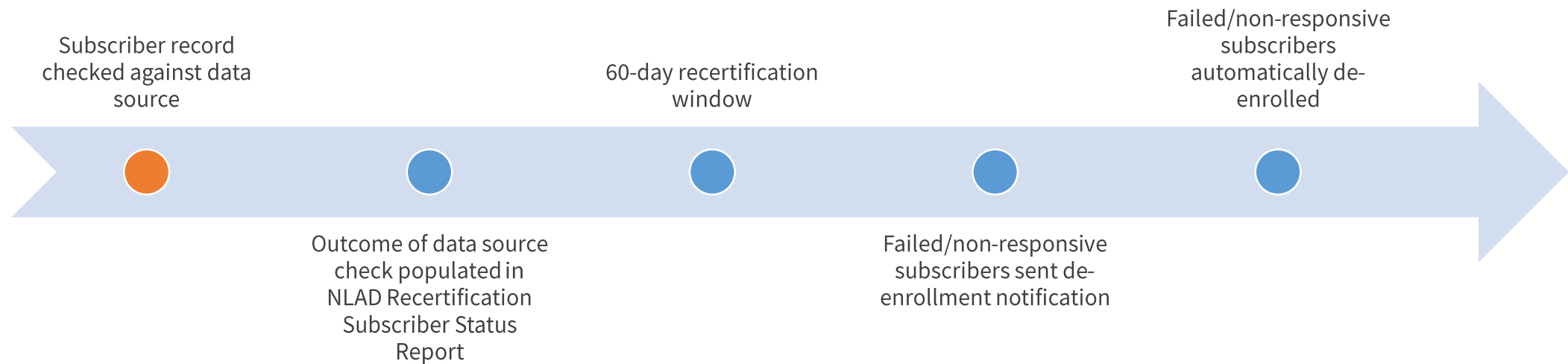
Recertification Timeline

- The National Verifier recertification process will start 90 days before a subscriber's Anniversary Date in NLAD.
- Recertification checks will be conducted every day and 60-day recertification windows will be initiated every business day.

Recertification Timeline – Daily Batching



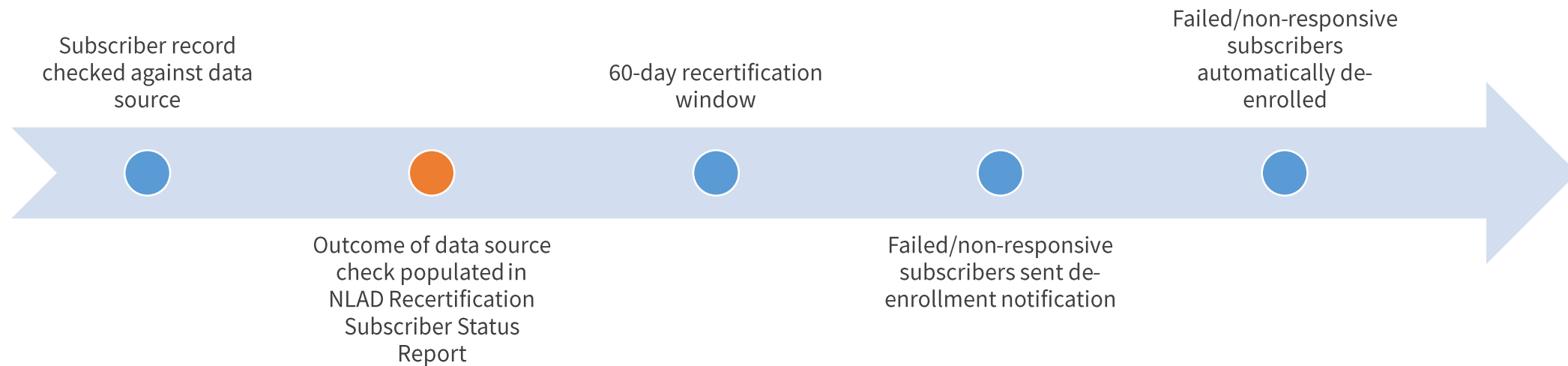
Recertification Process: Initial Data Source Check



Recertification Automated Checks

- Per the Lifeline rules, every subscriber in National Verifier recertification will first be run through an automated data source check.
- Subscribers will ***only*** have their eligibility checked.

Recertification Process: Recertification Subscriber Status Report



Recertification Reports in NLAD

- Service providers will be able to see which subscribers are currently undergoing recertification via the **Recertification Subscriber Status Report** that will be 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:
 - Outcome of data source check
 - Recertification status (updated daily)
 - Mail out date (if self-certification required)
 - Recertification deadline (if self-certification required)
 - This date will be 60 days from the date the initial mailing is sent.
 - Recertification method

Recertification Subscriber Status Report

The screenshot shows a web form titled "RECERTIFICATION SUBSCRIBER STATUS REPORT" with a red header bar. A blue link labeled "Instructions" is in the top right. The form is divided into sections: "Select Filters", "Select Report Format", and a "Submit" button. The "Select Filters" section includes a dropdown menu for "Select SAC(s)", two date input fields for "Recert Check Start Date" and "Recert Check End Date" (both set to 09/01/2018), and a "Type" section with three radio buttons: "Recertification Confirmed", "Recertification Not Confirmed", and "Recertification All". The "Select Report Format" section has two radio buttons: "Display on web page (limited to first 500 responses)" and "CSV file with each row containing selected data on a single subscriber". Annotations with arrows point to specific fields: "Will be able to select multiple SACs" points to the "Select SAC(s)" dropdown; "Report can be sorted by subscribers who have successfully recertified and those that haven't. This **does not** indicate which subscribers have been de-enrolled" points to the "Recertification Confirmed" radio button; and "Date when subscriber's eligibility is checked. This will be 90 days from subscriber's anniversary date." points to the date input fields.

RECERTIFICATION SUBSCRIBER STATUS REPORT [Instructions](#)

Select Filters

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

Recert Check Start Date 09/01/2018 Recert Check End Date 09/01/2018 → Date when subscriber's eligibility is checked. This will be 90 days from subscriber's anniversary date.

Type

Report can be sorted by subscribers who have successfully recertified and those that haven't. This **does not** indicate which subscribers have been de-enrolled →

☒ Recertification Confirmed
☐ Recertification Not Confirmed
☐ Recertification All

Select Report Format

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

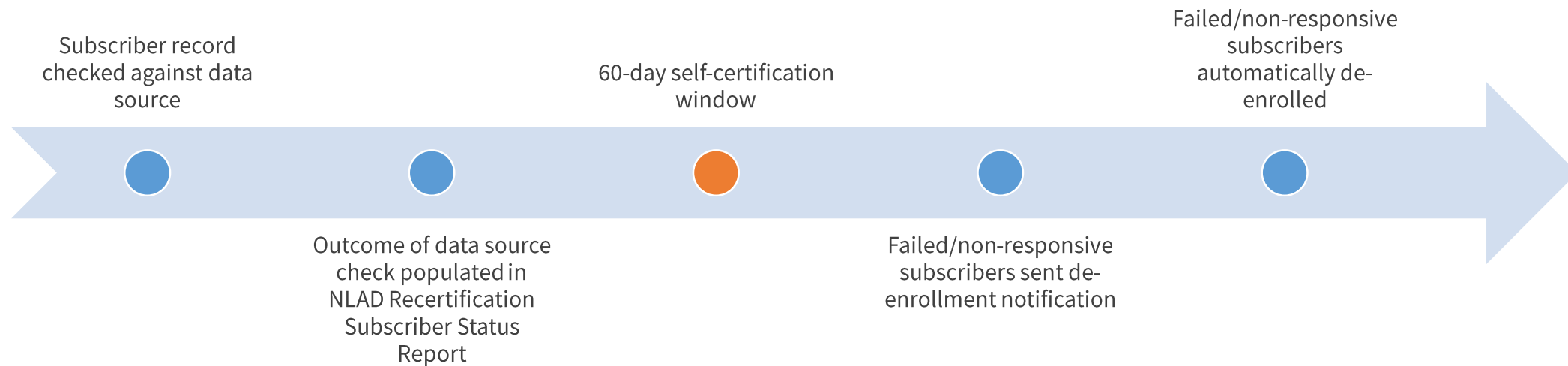
Self-Certification

- Subscribers whose eligibility can't be verified via an automated check will be required to self-certify their eligibility for the Lifeline benefit.
- USAC will conduct outreach to subscribers that did not pass an automated data source check and require self-certification.

The background of the slide is a solid blue color. Overlaid on this background is an abstract pattern of numerous white-outlined rectangles. These rectangles vary in size and are oriented at various angles, creating a dynamic, geometric composition that resembles a modern architectural or digital design.

Self-Certification Window Recertification Process


Recertification Process: 60-day self-certification window



60-Day Self-Certification Window – Initial mailing

- Per the Lifeline rules, the initial mailing to subscribers to initiate the recertification window will include:
 - A letter notifying them of their recertification requirement (English & Spanish)
 - A *barcoded* copy of FCC Form 5630 Annual Recertification Form (English & Spanish)
- This mailing will be sent approximately 90 days before the subscriber's Anniversary Date.

60-Day Self-Certification Window – Letter and Form



Universal Service
Administrative Co.

PO Box 7081
London, KY 40742-8302

Lifeline Program

[First Name] [Last Name]
[Mailing Address]
[Mailing City] [Mailing State] [Mailing Zip Code]

[Letter Date]

Dear [First Name] [Last Name],

Stay Connected! Time to Renew Your Lifeline Benefit by
[Letter Date + 60 days]

Lifeline is a federal program that lowers the monthly cost of phone and internet for qualified consumers. Every year, you must renew your benefit so that you can continue receiving your benefit. You must renew your benefit by **[Letter Date + 60 days]**.

How to Renew Your Benefit

You have to renew by **[Letter Date + 60 days]** or you will lose your Lifeline benefit! You can renew your benefit by doing **ONE** of the following options:

1. Call 1 (855) 359-4299. Enter your application ID number [#####] and follow the prompts.
2. Complete the online form at checklifeline.org. To complete the online recertification form you will need to create an account using the information **EXACTLY** as it appears below.
[First Name] [Last Name]
[Address]*
[City] [State] [Zip Code]
***ONLY** enter this line into the first address box – do **NOT** use the second address box.
3. Complete the form included with this letter and mail it to:
Lifeline Support Center
PO Box 7081
London, KY 40742-8302

Call us at 1 (800) 234-9473 if you have questions or need help renewing your Lifeline benefit.



Sincerely,
The Lifeline Support Center
Universal Service
Administrative Co.

WARNING: Lifeline is a U.S. government 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, or being barred from the program.

FCC FORM 5630

OMB APPROVAL EDITION 3060-0819

Lifeline Program
Annual Recertification Form



1.
About
Lifeline

Lifeline is a federal benefit that lowers the monthly cost of phone or internet service.

Rules

If you qualify, your household can get Lifeline for phone or internet service, but not both.

- If you get Lifeline for phone service, you can get the benefit for one mobile phone or one home phone, but not both.
- If you get Lifeline for internet service, you can get the benefit for your mobile phone or your home connection, but not both.
- If you get Lifeline for bundled phone and internet service, you can get the benefit for your mobile phone bundled service or your home-bundled service, but not both.

Your household cannot get Lifeline from more than one phone or internet company.

You are only allowed to get one Lifeline benefit per household, **not per person**. If more than one person in your household gets Lifeline, you are breaking the FCC's rules and will lose your benefit.

What is a household?

A household is a group of people who live together and share income and expenses (even if they are not related to each other).

Do not give your benefit to another person

Lifeline is non-transferable. You cannot give your Lifeline benefit to another person, even if they qualify.

Be honest on this form

You must give accurate and true information on this form and on all Lifeline-related forms or questionnaires. If you give false or fraudulent information, you will lose your Lifeline benefit (i.e., de-enrollment or being barred from the program) and the United States government can take legal actions against you. This may include (but is not limited to) fines or imprisonment.

Recertify

To recertify for a Lifeline benefit, fill out the required sections of this form, initial every agreement statement, and sign on page 5.

Bring or mail the form to this address:
USAC
Lifeline Support Center
P.O. Box 7081
London, KY 40742

Page 1 of 7

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

Self-Certification Methods

Recertification Process

60-Day Recertification Window – Recert Methods

Paper Recertification Form



Interactive Voice Response (IVR)



Recertify Online



Self-Certification Method #1: Recertify Online

- Subscribers can recertify online via the National Verifier web portal*
 - English and Spanish language support available
 - Instructions for recertifying online provided on letter to 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](#)

Self-Certification Method #2: Interactive Voice Response

- 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.*



Self-Certification Method #3: 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

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4.
Agreement

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

You must initial next to each statement.

☐ 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).

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

☐ 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).

☐ 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.

☐ 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.

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

☐ 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.

☐ 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.

☐ 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

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Need help? Call the Lifeline Support Center at 1-800-234-9473

Robo-calls & Postcard

- During the 60-day period, subscribers may receive up to three (3) robo-calls and a reminder postcard. Subscribers will receive scheduled reminders until they successfully recertify.
- Robo-calls inform subscribers:
 - That it is time to recertify their benefit,
 - Of their deadline to recertify, and
 - That they can continue immediately to recertify using the IVR, recertify online (URL provided), or complete and return the mailed recertification form

Renew Your Lifeline Benefit by <<Letter Date + 60 days>>



Call 1-855-359-4299 and follow the prompts



Visit www.checklifeline.org and complete the online form

Lifeline helps lower the cost of phone and internet

Renueve Su Beneficio Lifeline hasta el <<Letter Date + 60 days>>



Llamar al 1-855-359-4299 y sigue las instrucciones

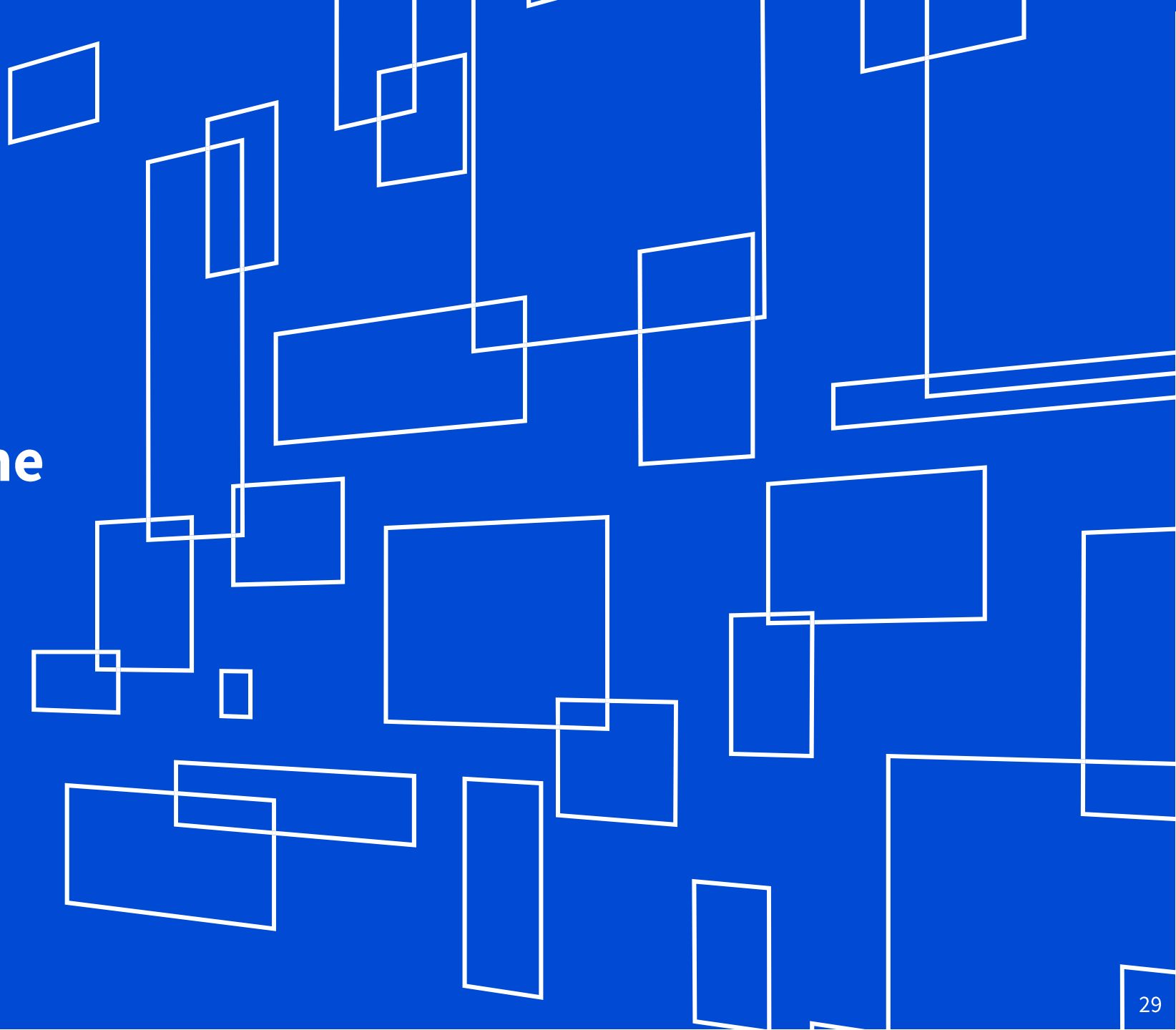


Vistar www.checklifeline.org y completar el formulario en linea

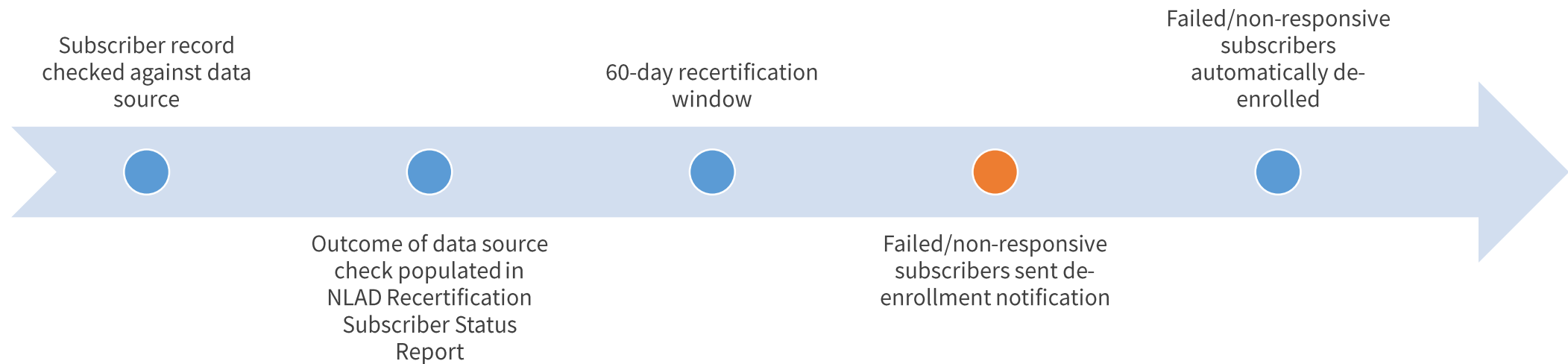
Lifeline ayuda a reducir el costo del teléfono y de internet

Recertification Outcome

Recertification Process



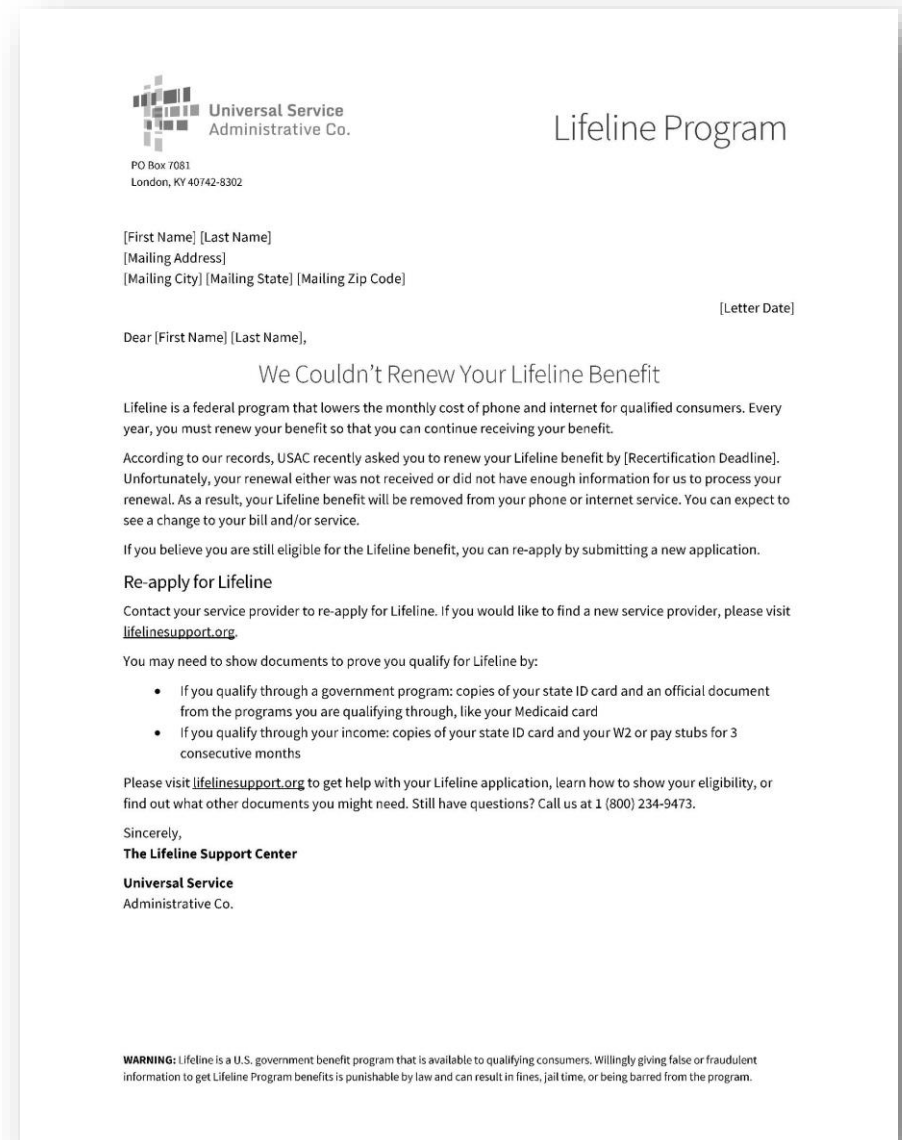
Recertification Process: Recertification Outcome



Recertification Outcome Notification from USAC

- Subscribers will be notified of the 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.
- 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.

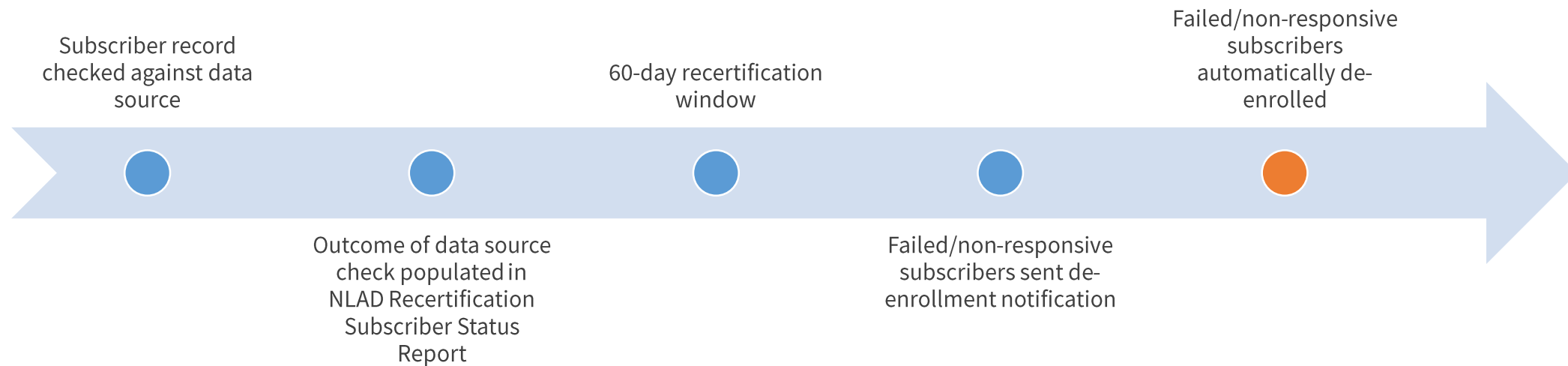
Only subscribers that are required to self-certify will be given the outreach listed above



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Automatic De-enrollment Recertification Process

Recertification Process: Failed Recertification De-enroll Report



Automatic De-enrollment from 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 the conclusion of their recertification window.
- Subscribers must complete recertification through ***one of the three self-certification recertification methods*** or they will be automatically de-enrolled.
- Service providers will be ***notified via an automated email*** of all de-enrollments for failed/non-responsive subscribers in NLAD through the **Failed Recertification De-enroll Report** in NLAD. The email notification will indicate de-enrollments have occurred in one or more of your 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.

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](#)

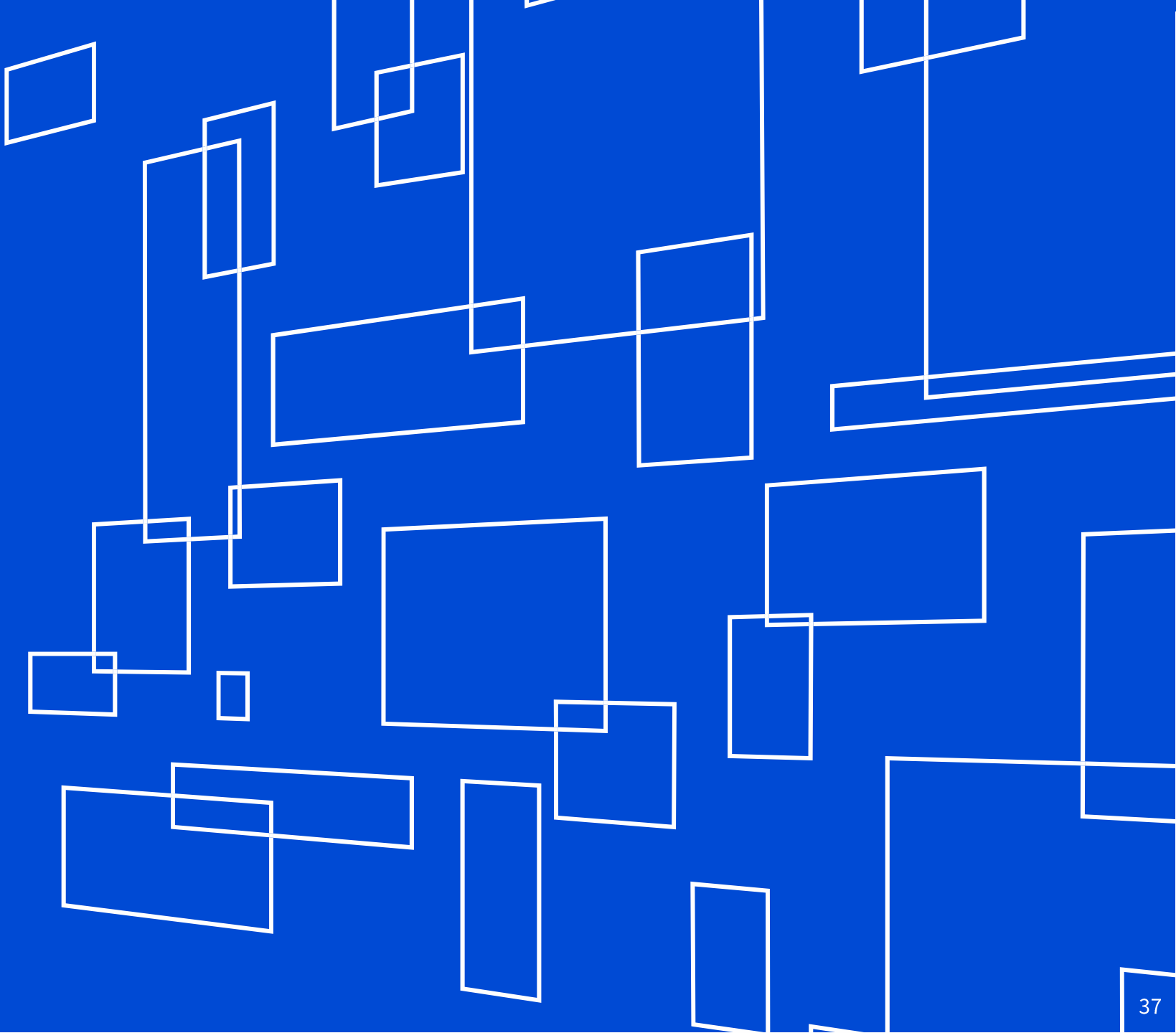
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35

NLAD Reports Review

- **Recertification Subscriber Status Report**
 - *What date should you enter?* – The day the recertification process starts for a subscriber, this will be 90 calendar days prior to their anniversary date.
- **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.

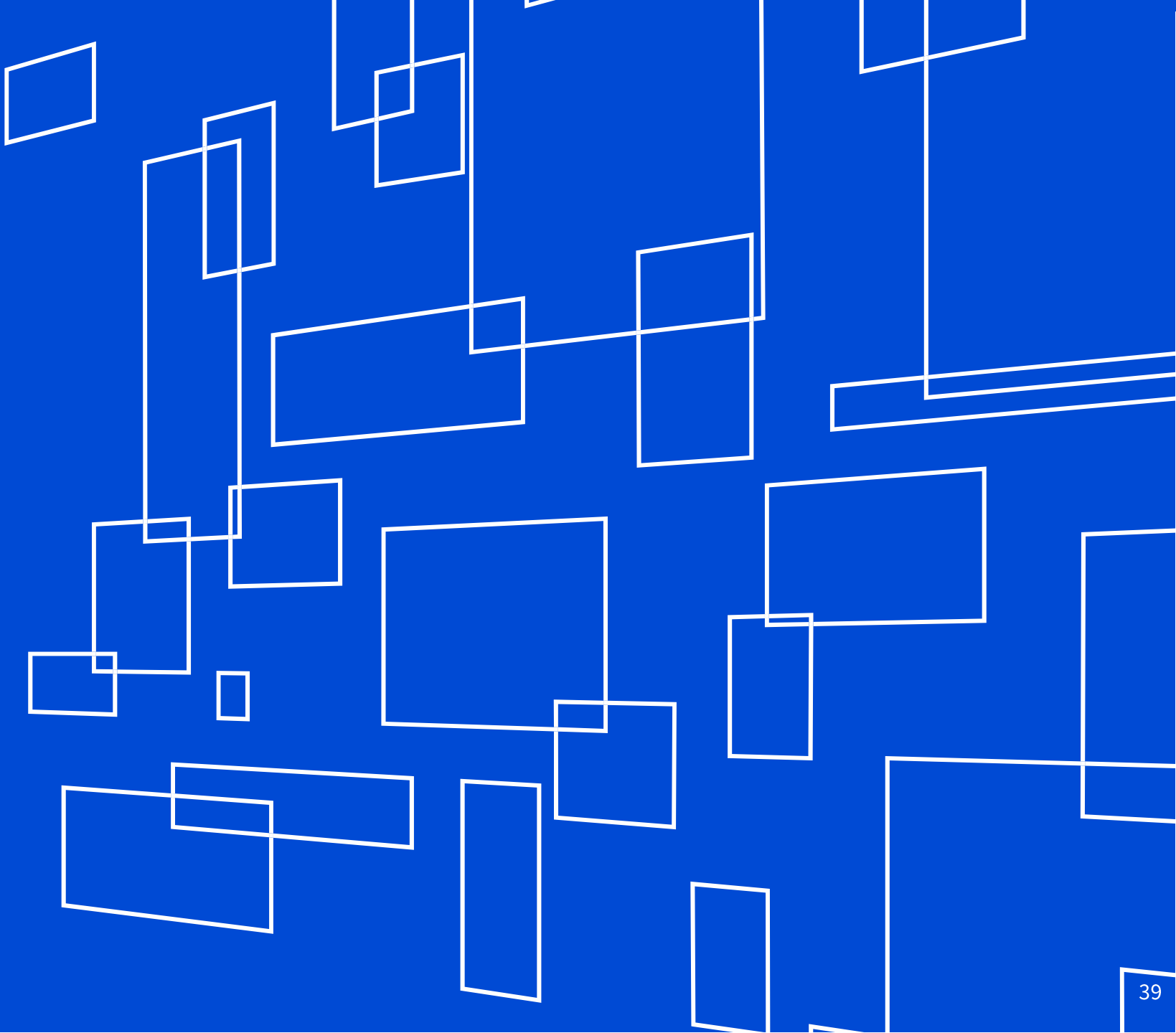
Form 555



FCC Form 555 Reporting

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

FAQs



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 three recertification methods or they will be de-enrolled from the Lifeline program.
- **If a subscriber attempts to self-certify and they fail, can they attempt to self-certify again?**
 - Yes – subscribers will have an unlimited number of attempts to self-certify during their 60-day window.

Questions?

Lifeline Program Webinar

- Thank you for joining us!
- Sign up for Lifeline Program email updates and upcoming events
 - Visit usac.org/li and click “subscribe” in the upper-right corner
- Need help? Contact us!
 - General: LifelineSupport@usac.org
 - Recertification: Liverifications@usac.org



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