Lifeline 101

February 2021 Monthly Webinar

Universal Service
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**

Meet Our Team

Tiffany Brady

Manager of Communications | Lifeline

Tiffany manages all communications for Lifeline, including state and federal partnerships.

Leah Sorini

Communications Specialist | Lifeline

Leah develops external communications, including website content, email campaigns, and training.

Agenda

- Announcements
- Program Overview
- Get Started as New Provider
- Lifeline Systems
- Support

Announcements

NV Consumer Portal: February Release, 2021 Federal Poverty Guidelines, COVID-19 Relief

NV Consumer Portal: February Release

- On **February 10, 2021**, USAC is releasing updates in the National Verifier (NV) consumer portal to improve the end-to-end user experience which include:
  - Updates to the password reset process
  - Enhancements to the consumers’ contact information

NV Consumer Portal: February Release

Updates to the Password Reset Process

- At the time of the release, consumers will no longer create three security questions when setting up a new account in the consumer portal
- If a consumer forgets their password, they can reset it through their email address provided during account creation instead of answering security questions
- Consumers who have online accounts but do not have email addresses may work with the Lifeline Support Center to reset their password if needed

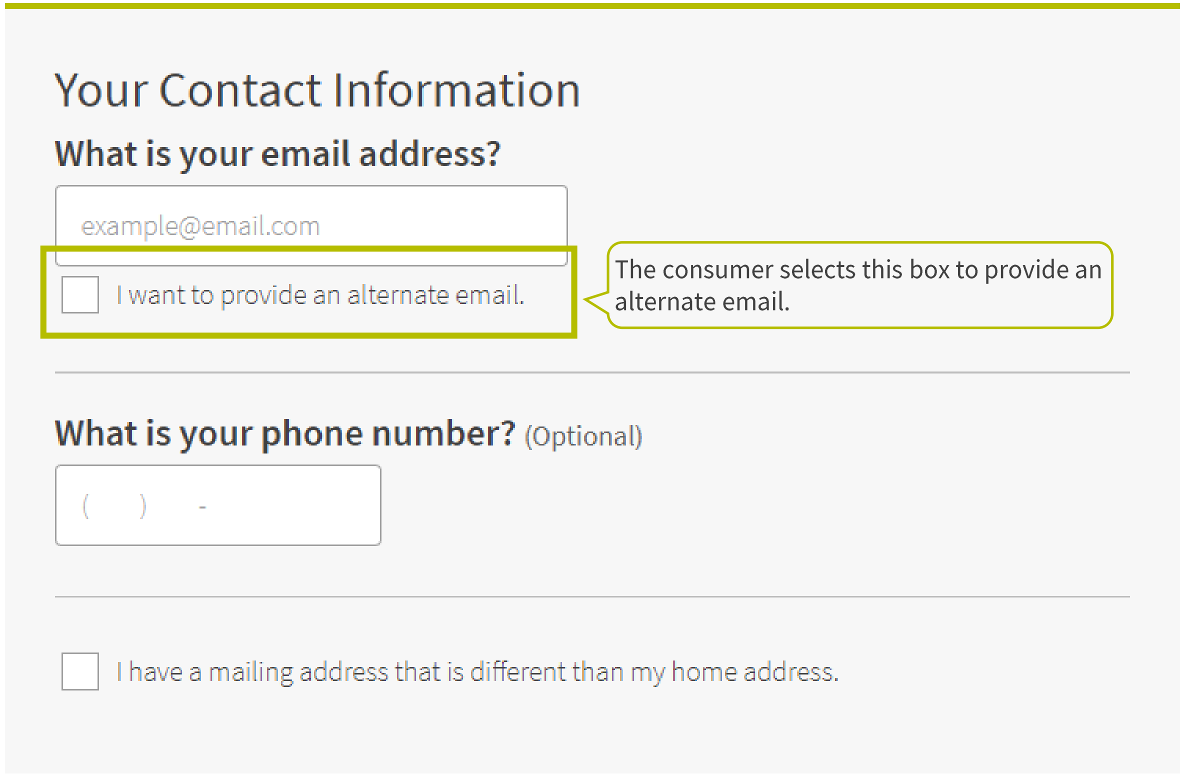
NV Consumer Portal: February Release

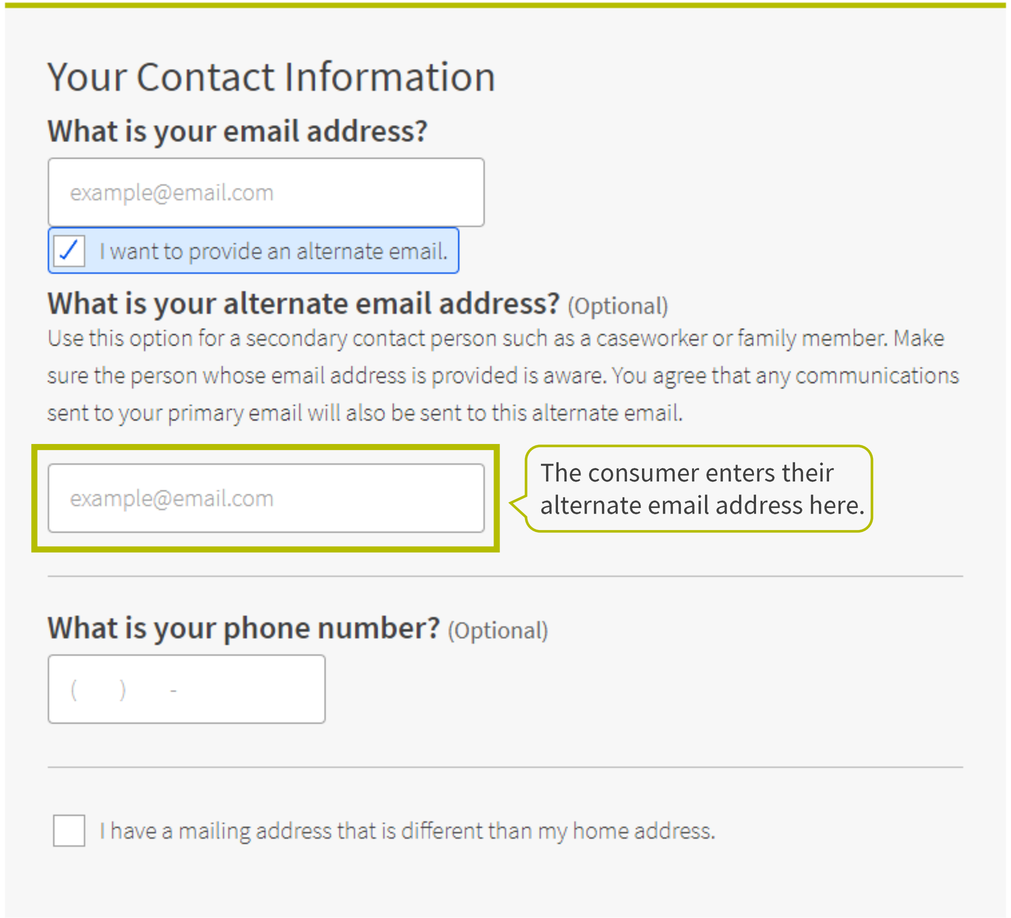
Consumers' Contact Information: Alternate Email Address

- A new, **optional** field will be available to consumers at the time of this release
- This will allow consumers to add an alternate contact person to their consumer portal, such as a caseworker or family member, by adding the contact's email address
- The alternate contact will receive any status or application updates that the consumer receives

NV Consumer Portal: February Release

Consumers’ Contact Information: Alternate Email Address

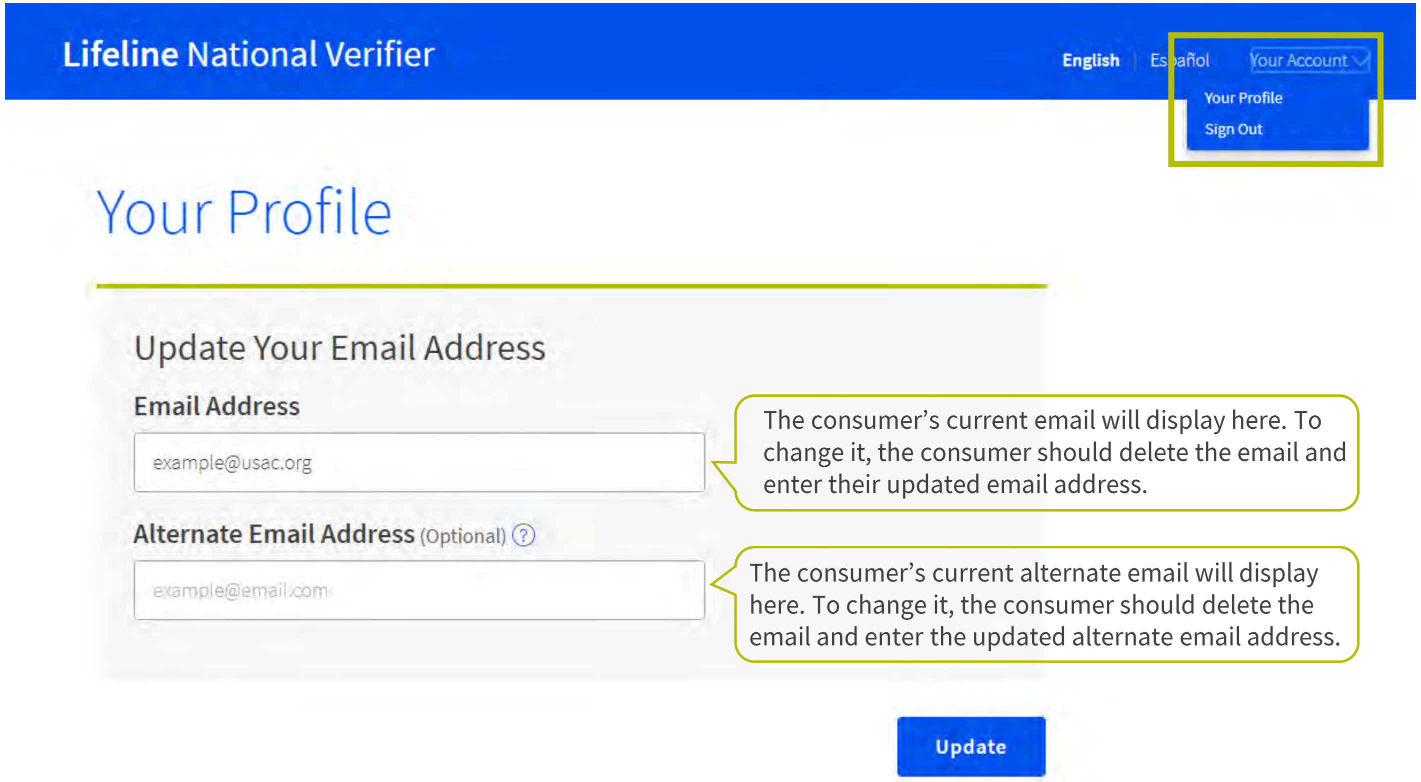




NV Consumer Portal: February Release

Consumers' Contact Information: Update Email Address

- At the time of the release, a "Your Profile" page will be available from the "Your Account" dropdown menu
- This page enables consumers to update any email addresses associated with their account if needed



2021 Federal Poverty Guidelines

The U.S. Department of Health and Human Services (HHS) released the 2021 Federal Poverty Guidelines (FPG) in January, and USAC has updated the Lifeline Income Eligibility Chart to reflect 135% of the 2021 FPG:

- Service providers should review the updated chart on the Income Eligibility webpage
- Service providers have until **Wednesday, March 31, 2021**, to update their forms and systems
- Service providers that have state-issued forms should follow their state's guidance (e.g., the NLAD opt-out states – California, Oregon, and Texas)

COVID-19 Relief

Throughout 2020, the FCC and USAC implemented a series of waivers and temporary program changes to provide relief to Lifeline stakeholders during the pandemic:

- Provided flexibility when income and identity documentation is needed to resolve consumers' application errors
- Provided additional relief for consumers residing in rural areas on Tribal lands
- Paused program processes that could lead to de-enrollment
- All temporary program changes and waivers are set to expire on **February 28, 2021**
- For more information, review USAC's Lifeline COVID-19 Response webpage

Program Overview

Lifeline Benefit and Eligibility Criteria

Lifeline Benefit

A monthly discount for phone or internet service for eligible low-income consumers

- All eligible consumers can receive a discount of up to $9.25 per month
- Consumers who live on qualifying Tribal lands can receive enhanced support of up to $34.25 per month
- Link Up offers residents on Tribal lands eligible for Lifeline support reimbursement to start service at their address
  - Link Up is a **one-time benefit per address**
  - Consumers may request Link Up if they move to an address eligible to receive the Link Up reimbursement
  - Not all Lifeline service providers offer Link Up so consumers should ask their phone or internet company

Lifeline Benefit

Lifeline support is provided directly to the phone or internet company, which passes the support on to the consumer as a discount. Lifeline support is based on the service(s) a consumer receives that meet the Lifeline minimum service standards.

Service Options

Service Type	Description
Voice (mobile or landline)	Subscriber is provided a voice only service that meets the minimum service standards
Broadband (internet)	Subscriber is provided a broadband only service that meets the minimum service standards
Bundled Voice	Subscriber is provided a voice and broadband service that meets the voice minimum service standards only
Bundled Broadband	Subscriber is provided a voice and broadband service that meets the broadband minimum service standards only
Bundled Voice and Broadband	Subscriber is provided a voice and broadband service that meets both the voice and broadband minimum service standards

Minimum Service Standards

Mobile Voice	Mobile Broadband	Home Broadband
1000 Minutes	**Speed**: 3G or better; **Usage Allowance**: 4.5 GB	**Speed**: 25/3 Mbps; **Usage Allowance**: 1024 GB

Eligibility Criteria

Consumers can qualify for Lifeline by showing that:

1. Their income is at or below 135% of the federal poverty guidelines, **or**
2. They participate in at least one of the following qualifying government programs:
   - Medicaid
   - Supplemental Nutrition Assistance Program (SNAP)
   - Supplemental Security Income (SSI)
   - Federal Public Housing Assistance (FPHA)
   - Veterans and Survivors Pension Benefit
   - Residents on Tribal lands can also demonstrate their eligibility for Lifeline by participating in a Lifeline-qualifying Tribal program

Eligibility Criteria

- **Qualify through dependent** (*e.g., child*): Consumers can sign up for Lifeline if a dependent participates in any of the programs listed previously
- **One per household**: Only one Lifeline benefit is allowed per household, which is defined as a group of people that share income and expenses
  - If a consumer lives with other people that receive Lifeline but do not share income and expenses (*e.g., nursing home, homeless shelter, roommates*), then they may still be eligible
  - Lifeline applicants typically must complete a one-per-household worksheet to self-certify that they do not share income and expenses with another Lifeline subscriber if they share the same address

Questions?

Get Started as a New Provider

Join Lifeline as an ETC

Join Lifeline as an ETC

- Eligible telecommunications carriers (ETCs, or service providers) can offer a discount to eligible low-income customers on their home phone, mobile phone, or mobile/fixed broadband bill and receive a reimbursement from the federal universal service fund through USAC's Lifeline program
- To offer Lifeline-supported services, service providers must:
  - Become an Eligible Telecommunications Carrier (ETC)
  - Ensure Compliance with Relevant Lifeline Program Rules
  - Create and File a Compliance Plan if not facilities-based
  - Obtain a Study Area Code (SAC)
  - Obtain a 498 ID
- These steps are laid out in more detail on the Join Lifeline as an ETC webpage

Join Lifeline as an ETC

Become an ETC

- To participate in Lifeline, service providers must be designated as an ETC by their respective state regulatory commission or, in some cases, by the FCC
  - Where states designate Lifeline ETCs, service providers should contact their respective state utility commission to initiate the ETC designation process
  - Where states do not designate Lifeline ETCs, service providers must apply to the FCC for designation

Ensure Compliance with Relevant FCC Lifeline Rules

- Lifeline ETCs must comply with relevant Lifeline rules, including those found at 47 CFR §§54.400-423 and 47 CFR §§54.201-203

Join Lifeline as an ETC

Create a Compliance Plan

- Service providers who are resellers rather than facilities-based providers and, thus, are availing themselves of the blanket facilities forbearance granted by the FCC must submit a compliance plan to the FCC and provide USAC with a summary of their Lifeline compliance plan(s)
- Information regarding what should be contained in the compliance plan can be found in the Wireline Competition Bureau's Lifeline Compliance Plan Guidance Public Notice, available at: https://www.fcc.gov/document/lifeline-compliance-plan-guidance-public-notice

Join Lifeline as an ETC

Create a Compliance Plan

- Service providers who are designated as ETCs by their state PUC will need to meet any state requirements for creating and submitting compliance plans
- The compliance plan summary provided to USAC should include:
  - The details of the number of minutes provided as part of the plan, along with any additional charges for toll calls and rates, and
  - A summary of the terms and conditions of the plan and whether the plan is made available to the public

Join Lifeline as an ETC

Obtain a SAC

- A SAC is a number that USAC assigns to service providers that uniquely identifies that company based on its service area
- Companies must have at least one SAC per state in which they operate, but can have more than one SAC within a state if they have more than one service area
- Service providers must complete a SAC Request Form and submit it to USAC

Join Lifeline as an ETC

Obtain a 498 ID

- A 498 ID (also known as SPIN) is required for all parties that participate in any of the four universal service programs and receive payment directly from USAC
- This ID is a unique number assigned to each service provider by USAC and serves as USAC's tool to ensure that approved support is directed to the correct service provider
- Service providers register for a 498 ID by visiting E-File in one portal

Questions?

Lifeline Systems

NV, NLAD, LCS, RAD

Lifeline Systems

- The **Representative Accountability Database (RAD)** is a registration system that validates the identities of service provider representatives performing transactions in the NV and NLAD
- The **Lifeline National Eligibility Verifier (NV)** is a centralized system that determines whether consumers are eligible for Lifeline
- The **National Lifeline Accountability Database (NLAD)** allows service providers to enroll consumers who have qualified through the NV in the program and transfer consumers (with the consumer's consent) to their company
- The **Lifeline Claims System (LCS)** is the online filing system that service providers use to submit claims for reimbursement for offering Lifeline-supported services to Lifeline subscribers
  - Service providers can only claim reimbursement for Lifeline subscribers that are enrolled in NLAD

***Note**: Service providers in NLAD opt-out states (California, Oregon, and Texas) may interact with these systems differently. Visit the NLAD opt-out states webpage for more information.*

Lifeline Systems

How to Use RAD

- Service provider representatives must register for a Representative ID through RAD
- RAD registration is a two-step process:
  - Representatives **self-register** for a Representative ID, which will be needed to perform transactions in NLAD and the NV
  - Representatives provide their Representative ID number to each service provider for which they work
    - ◇ Service providers will use the Representative ID to link the number to the representative's NLAD and/or NV account credentials
    - ◇ Service providers can find detailed instructions on how to link Representative IDs in the How to Link a Rep ID and Data Input Templates section of the RAD Resources page
- For more information about RAD, visit the RAD section of USAC's website

Lifeline Systems

How to Use the NV

Consumers may apply through the NV using **one** of the three options below:

Option 1:
Apply Online

- The consumer visits CheckLifeline.org
- Online application accessible from any computer or mobile device

Option 2:
Apply by Mail

- The consumer fills out the Lifeline Application Form
- The consumer mails in their documentation to the Lifeline Support Center or delivers it to their service provider

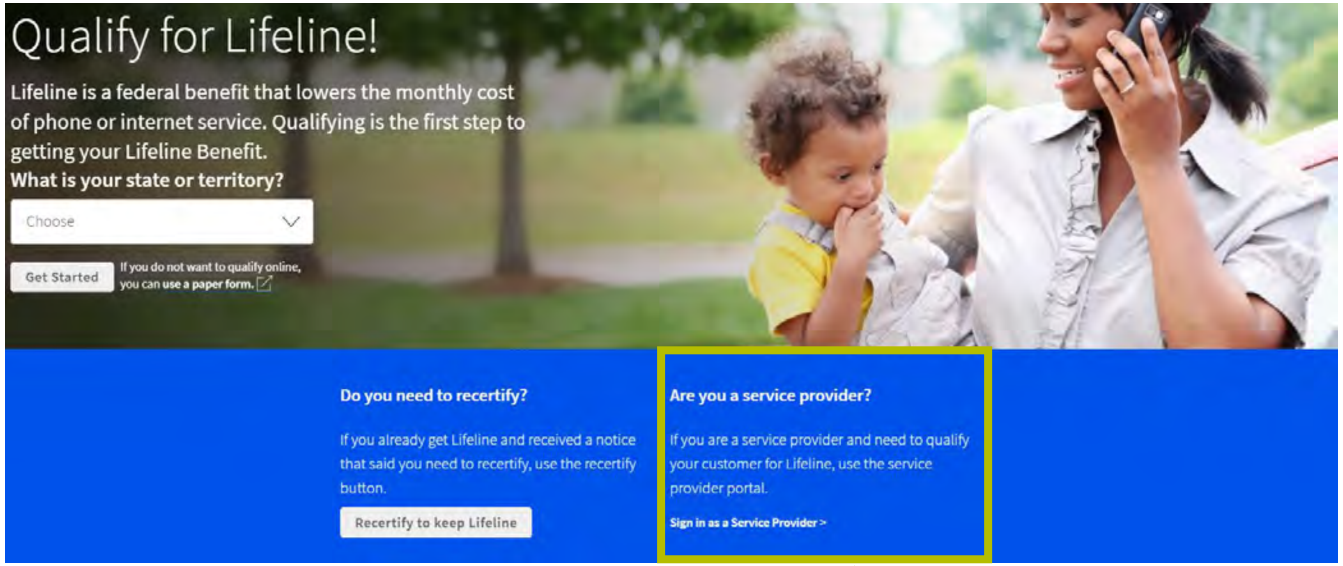
Option 3:
Apply Through a Service Provider

- The consumer may apply with the assistance of a service provider
- Service providers may submit an online application on the consumer's behalf using the NV service provider portal (also available at CheckLifeline.org), or
- Through the National Verifier Eligibility Check API if the service provider has elected to use that option

Lifeline Systems

How to Use the NV: Service Provider Portal

- Service providers' using the service provider portal must meet with the consumer **in-person** to help the consumer apply
- Service providers will use an interview-style approach to ask the consumer for the required information, complete the application, and upload documentation (if needed)
- Consumer must initial and e-sign the online application
- For more information on the NV service provider portal, visit the NV How to Use It webpage



Sign in to the service provider portal here

Lifeline Systems

How to Use the NV: NV Eligibility Check API

- An API or application program interface allows two software programs to interact with one another
- The NV Eligibility Check API allows Lifeline service providers to connect their online applications with the NV, which enables Lifeline consumers to apply to Lifeline through a provider's website
- The use of such a connection is **fully optional** so not all service providers may make this available
- The two APIs:
  - An **Eligibility Check API** initiates a new application and eligibility check in the NV after a consumer applies on a service provider's enrollment system, and the NV checks include validations to verify the consumer's identity, address, eligibility, and duplicate status (address/subscriber)
  - A **Status Check API** allows a user to check the status of an application using a unique identifier (token) generated and returned during the eligibility check
- For more information about the NV Eligibility Check API, visit the National Verifier Eligibility Check API webpage

Lifeline Systems

How to Use NLAD

- NLAD is available through USAC's one portal system, which is a single portal dashboard that allows users to access all of their USF IT applications (including Lifeline systems) through the same sign-on process
- NLAD allows service providers to manage their Lifeline subscribers, including enrolling consumers in the program, transferring subscribers, and reviewing reports about their Lifeline subscribers
- All account types for NLAD and the NV are created in NLAD, and the accounts are outlined in the chart
- For more information about NLAD, visit the NLAD section of USAC's website

Account Type	System Access
ETC Administrator	The user can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests, and the user can create and manage the three account types below in NLAD. The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV.
ETC Analyst	The user can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests in NLAD. The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV.
ETC Operations	The user can query subscriber data, create and view reports, and submit resolution requests in NLAD. The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV.
ETC Agent	The user does **not** have NLAD access. The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV.

Lifeline Systems

How to Use LCS

- LCS user account types:
  - The **497 Officer** can enter data, is authorized to certify the claim, can create sub-accounts, and is responsible for password resets for sub-accounts
  - A **497 User** (sub-account) is a company employee that can enter data, but does not have the authority to certify the claim
- For more information about LCS, visit the LCS section of USAC's website

Lifeline Systems

How to Use LCS

To file a claim in LCS, service providers will:

1. Access LCS and download the list of subscribers eligible for reimbursement,
   - The list is a report in LCS based on the NLAD "Subscriber Snapshot" report
   - For service providers in NLAD opt-out states, this is based on information provided by the state public utility commission (PUC)
2. Modify the appropriate data on the list as needed,
   - Add the dollar amount claimed for each subscriber on the report (the system automatically defaults to the value from the prior month for all states except NLAD opt-out states)
   - Indicate which subscribers are **not** being claimed and **why**
3. Upload the report back in LCS,
4. Set the claim as "ready to certify," and
5. Certify the submission (*497 Officer must complete this step*)

Questions?

Support

Educational Material on USAC's Website and Lifeline Team

Educational Material on USAC's Website

- USAC has two websites available to stakeholders :
  - Lifeline's consumer website available at LifelineSupport.org
  - USAC's service provider website available at USAC.org/Lifeline

Educational Material on USAC's Website

- Review the content in USAC's Lifeline section for:
  - Details on Lifeline systems
  - Recent announcements
  - Important, upcoming dates
  - Program data

Educational Material on USAC's Website

- Watch videos about Lifeline's systems on the Lifeline Videos webpage, including:
  - RAD
  - NV
  - NLAD

Educational Material on USAC's Website

- Review previous monthly webinars and system training on the Lifeline Webinars webpage:
  - Webinar recordings
  - PDF of slide decks

Educational Material on USAC's Website

- On the Resources for State and Federal Partners webpage, USAC has posted Lifeline educational material for consumers and those supporting consumers:
  - The state Public Utility Commission (PUC) brochure includes information about the program's eligibility criteria, the application process, and Lifeline's contact information
  - State PUCs may add their contact information, availability, and logo to the first page of the brochure, as well as any relevant state-specific information to the last page, so that consumers in their state can reach the PUC with state-specific questions

Educational Material on USAC's Website

- Additional educational material for consumers include:
  - How to Apply one-pager
  - Manage your Benefit one-pager
  - Tribal Lifeline Flyer
  - Tribal Toolkit

Lifeline Team

Contact the Lifeline Support Center

Email: LifelineSupport@usac.org

Call: (800) 234-9473 (*press 1 for English; press 2 for Spanish*)

The Lifeline Support Center serves consumers and those supporting consumers, and is available **7 days a week, from 9:00 a.m. to 9:00 p.m. ET**.

Lifeline Team

Email a Lifeline Program Analyst

- To connect with a Lifeline program analyst, email LifelineProgram@usac.org
- Service providers should email LifelineProgram@usac.org about:
  - **Technical issues**: System questions (*e.g., questions about the NV, NLAD, RAD*)
  - **Process questions**: Recertification and/or reverification
  - **Service provider requirements**: Lifeline rules and/or program waivers

Questions?

Learn More About Lifeline

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

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