

November 2021 Monthly Webinar

Lifeline Program 101



Universal Service
Administrative Co.

DISCLAIMER:

To accommodate all attendees, real-time closed captions will be present during this presentation. This is a new feature we are testing out to improve webinar accessibility for all. We understand it is a significant change and appreciate your patience. We apologize in advance for any transcription errors or distractions. Thank you for your support.

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



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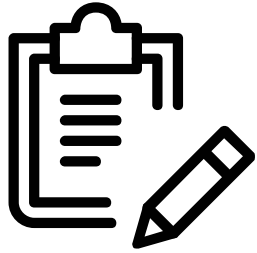
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Objectives

At the end of the session, you will...



...be able to:

- Know how to join Lifeline as a new service provider
- Create a compliance plan
- Check the status of an application
- Assist consumers with submitting documentation using the NV
- Use the Lifeline Claims System



...understand:

- The basic functions of the Lifeline program

Agenda

- Announcements
 - COVID-19 Waivers
 - Hurricane Ida Waivers
 - System Enhancements
- Lifeline Program Overview
 - Program Overview
 - Get Started as New Provider
 - Lifeline Systems
- Resources

Announcements

Waivers

Announcements

Reminder: COVID-19 Waivers Extended

- On **September 22, 2021**, the Wireline Competition Bureau (Bureau) extended the waivers governing recertification, reverification, general de-enrollment, and income documentation through December 31, 2021
- On **September 22, 2021**, the Bureau also extended the waiver regarding documentation requirements for subscribers residing in rural areas on Tribal lands through December 31, 2021
- ***Reminder:*** The waiver governing FCC's Lifeline non-usage rule ended May 1, 2021
- USAC will continue to temporarily accept driver's licenses or state identification cards that have expired on or after March 1, 2020, when needed to complete any Lifeline applications

Announcements

Hurricane Ida Waivers

- On September 3, 2021, the Bureau issued [Order DA 21-1107](#) waiving certain Lifeline rules and deadlines to assist participants located in the areas affected by Hurricane Ida
- This Order identifies the “Affected Disaster Areas” as all parishes and counties in Louisiana and Mississippi
- For subscribers residing in the Affected Disaster Areas, this Order temporarily waives, **through November 30, 2021**, the Lifeline non-usage rules that require a service provider to de-enroll Lifeline subscribers who do not pay a monthly fee for their Lifeline-supported service, do not use that service for 30 consecutive days, and do not cure their non-usage within a 15-day period.

Announcements

Hurricane Ida Waivers

- At the end of the waiver period, Lifeline subscribers subject to the non-usage rule and residing within the impacted areas will have 30 days to use their Lifeline service
- If the subscriber does not use their Lifeline service during the 30-day window (from December 1st through December 30th), the 15-day notice period will begin on December 31, 2021
- Service providers in the affected disaster areas that are unable to comply with the Lifeline non-usage requirements at the end of the waiver may request tailored relief from the FCC

Announcements

Minimum Service Standards Effective December 1, 2021

Effective Date	Mobile Voice	Mobile Broadband	Fixed Broadband
12/1/2020 (Current)	1000 Minutes	Speed: 3G or better; Usage Allowance: 4.5 GB	Speed: 25/3 Mbps; Usage Allowance: 1024 GB
12/1/2021	1000 Minutes	Speed: 3G or better; Usage Allowance: 4.5GB	Speed: 25/3 Mbps; Usage Allowance: 1229 GB

Announcements

Minimum Service Standards Effective December 1, 2021

Voice-Only Phase-Out Paused

- On [November 5, 2021](#), the Wireline Competition Bureau (Bureau) paused the phase-out in Lifeline support for voice-only services for one year. The reimbursement amount for Lifeline voice-only services will continue to be \$5.25 on and after December 1, 2021

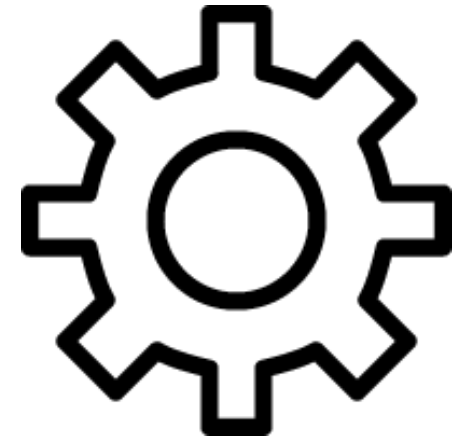
Announcements

System Enhancements

System Enhancements

Reminder: Application ID Enrollment

- The Application ID Enrollment workflow provides an alternative verification, enrollment, and transfer process that requires limited personally identifiable information (PII)
 - This functionality was released on October 26, 2021
- Service providers can complete **Verify**, **Enroll**, and **Transfer** transactions using a consumer's Application ID from a qualified application in the National Verifier



System Enhancements

Reminder: Update Lifeline Subscriber

- USAC also streamlined the process for service providers to perform updates to a subscriber's record **without** their full PII
- With the consumer's Subscriber ID or Telephone Number, service providers can now perform update transactions via NLAD
- This functionality was also released on October 26, 2021

Program Overview

Lifeline Benefit and Eligibility Criteria

Program Overview

Lifeline Benefit



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

1. All eligible consumers can receive a discount of up to \$9.25 per month
2. Consumers who live on qualifying Tribal lands can receive enhanced support of up to \$34.25 per month
3. [Link Up](#) offers Lifeline eligible residents on rural Tribal lands 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

Program Overview

Lifeline Benefit

Lifeline support is provided directly to the phone or internet company, which must pass the full support amount 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 per month	Speed: 25/3 Mbps; Usage Allowance: 1024 GB per month

Program Overview

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](#)

Program Overview

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 they do not share income and expenses (e.g., *nursing home, homeless shelter, roommates*), then they may still be eligible to participate in the Lifeline program
 - Lifeline applicants that live at an address with more than one household 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

Get Started as a New Provider

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, mobile/fixed broadband, or bundled offering (voice and 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 (SPIN)
- These steps are laid out in more detail on the [Join Lifeline as an ETC](#) webpage

Get Started as a New Provider

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 Federal Communications Commission (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

Get Started as a New Provider

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 conditional 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](#).

Get Started as a New Provider

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

Get Started as a New Provider

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

Get Started as a New Provider

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?

Poll

Lifeline Systems

NV, NLAD, LCS, & RAD

Lifeline Systems

Overview

- 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. Service providers are also required to manage subscribers in NLAD (ensure information is up to date) in addition to enrolling/transferring
- 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 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

Application Process

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](https://www.CheckLifeline.org)
- Online application is accessible from any computer or mobile device

Option 2:

Apply by Mail

- The consumer fills out the Lifeline Application Form
 - [English Form](#)
 - [Spanish Form](#)
- The consumer mails the application and supporting documentation to the Lifeline Support Center

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](https://www.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

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?

Choose

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

Are you a service provider?

If you are a service provider and need to qualify your customer for Lifeline, use the service provider portal.

[Sign in as a Service Provider >](#)

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 service 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	<p>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</p> <p>The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV</p>
ETC Analyst	<p>The user can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests in NLAD</p> <p>The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV</p>
ETC Operations	<p>The user can query subscriber data, create and view reports, and submit resolution requests in NLAD</p> <p>The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV</p>
ETC Agent	<p>The user does not have NLAD access</p> <p>The user can request eligibility checks, documentation uploads, and status checks of consumers in the NV</p>

Lifeline Systems

How to Use the Lifeline Claims System (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** (using the correct reason code)
3. Upload the report back in LCS
4. Set the claim as “ready to certify”
5. Certify the submission (*497 Officer must complete this step*)

Questions?

Poll

Questions?

Resources

Resources

Educational Material

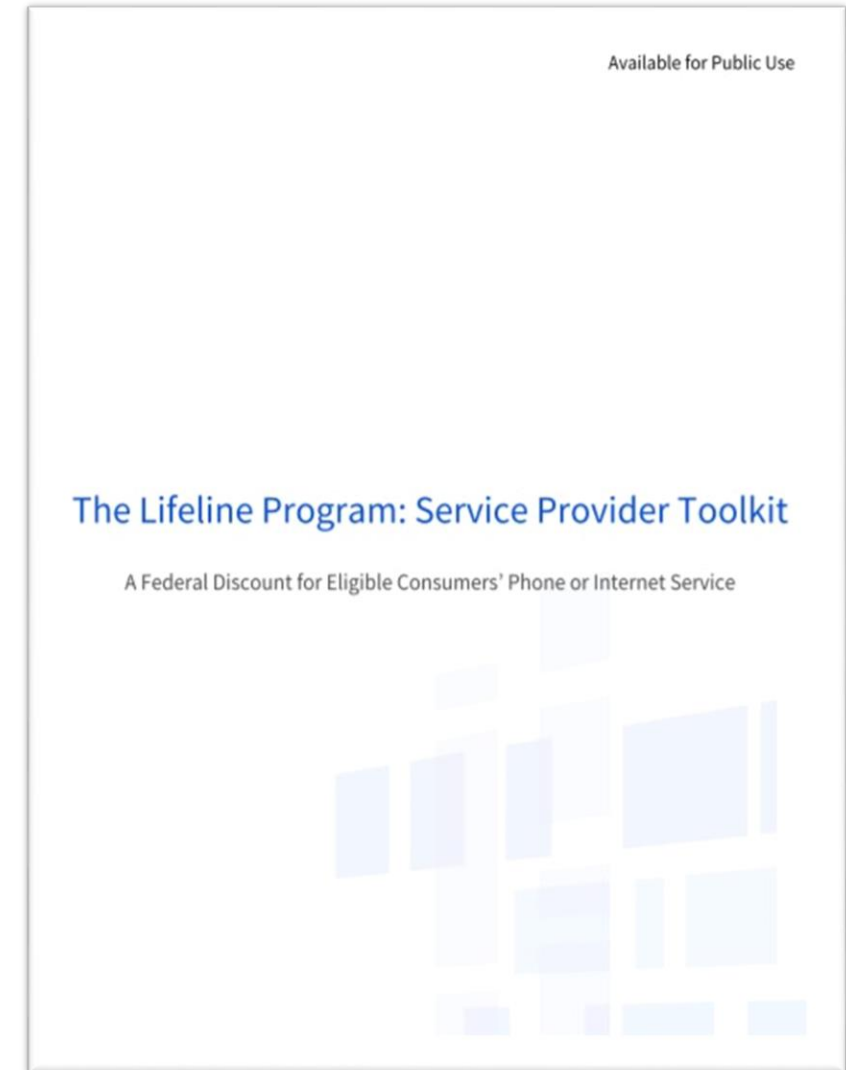


- USAC has two websites available to stakeholders:
 - Lifeline's consumer website available at LifelineSupport.org
 - USAC's service provider website available at USAC.org/Lifeline

Resources

Educational Material

- Review the [Lifeline Program Service Provider Tool Kit](#) for a one-stop guide to the Lifeline program



Resources

Educational Material



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

Resources

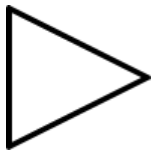
Educational Material



- Watch videos about Lifeline's systems on the [Lifeline Videos](#) webpage, including:
 - National Verifier (NV)
 - National Lifeline Accountability Database (NLAD)
 - Representative Accountability Database (RAD)

Resources

Educational Material



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

Resources

Educational Material

- 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

Resources

Educational Material

- Additional educational material for consumers include:
 - [How to Apply](#) One-Pager
 - [Manage your Benefit](#) One-Pager
 - [Tribal Lifeline](#) Flyer
 - [Tribal Toolkit](#)

Resources

Contact the Lifeline Support Center



- 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.**

Resources

Lifeline Team

Email a Lifeline Program Analyst

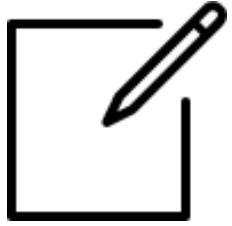
- To connect with a Lifeline program analyst, email LifelineProgram@usac.org
- Service providers should email LifelineProgram@usac.org about:
 - **Technical issues:** System questions (e.g., *questions about the NV, NLAD, RAD*)
 - **Process questions:** Recertification and/or reverification
 - **Service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

Questions?

Learn More About Lifeline

- [Sign up](#) for Lifeline email updates and upcoming events
- Need help? Contact us!
 - General inquiries: LifelineProgram@usac.org

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Thank You!





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