September 2021 Monthly Webinar

Lifeline Claim System (LCS)
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
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.
Meet Our Team

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Winta creates website content and training for consumer advocates, consumers, and service providers.

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Tiffany manages all communications for Lifeline, including state and federal partnerships.
• Announcements
• Introduction
• How to File Claims
• Support
Announcements
COVID-19 Waivers Extended

- On **June 28, 2021**, the FCC extended the waivers governing recertification, reverification, general de-enrollment, and income documentation through September 30, 2021.

- On **June 28, 2021**, the FCC also extended the waiver regarding documentation requirements for subscribers residing in rural areas on Tribal lands through September 30, 2021.

- **Reminder:** *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.
LCS Release to Decrease Over-Claims

Warning Message for Service Providers Subject to Non-usage Requirements

• USAC released a new warning in the Lifeline Claims System (LCS)
• LCS users subject to the non-usage requirements will see the following warning if they are attempting to claim an unusually high percentage of their subscribers:
  • “The SAC(s) below have an unusually low percentage of unclaimed subscribers. This may indicate you are claiming subscribers who have not yet activated their device or who are in their non-usage cure period. Do you want to make changes to your filing?”*  
  * If submitting a claim for a month between March 2020-April 2021, please click ‘no my filing is accurate’ and proceed”
LCS Release to Decrease Over-Claims

Warning Message for Service Providers Subject to Non-usage Requirements

• This warning will not prevent LCS users from submitting their claim
  • It encourages service providers to double check the data before submission and certification
Changes to Eligible Services on December 1, 2021

Increase in Broadband Minimum Service Standards

- Lifeline broadband minimum service standards is currently set to increase on December 1, 2021 to:
  - **Mobile broadband** minimum service standards:
    - Usage: 18 GB/month*
    - Speed: 3G
  - **Fixed broadband** minimum service standards:
    - Usage: 1,229 GB/month
    - Speed: 25 MB download/3 MB upload
Changes to Eligible Services on December 1, 2021

Lifeline Voice-Only* Services Phase Out

• In the 2016 Lifeline Order, the FCC outlined a shift in the Lifeline program towards a greater focus on supporting broadband services for Lifeline eligible consumers, including
  • A transition period to phase out support for voice-only Lifeline services before reimbursement for such services decreases to $0 on December 1, 2021
  • An exception to a complete phase-out allowing for $5.25 in Lifeline reimbursement per subscriber per month beginning December 1, 2020, and continuing after the December 1, 2021 final phase-out, for qualifying voice-only services provided to Lifeline subscribers in Census blocks where there is only one Lifeline provider

*“Voice-Only” references qualifying standalone voice service or voice service with broadband below the minimum service standards.
Introduction
System Overview

- LCS is the online filing system that service providers use to receive reimbursement for offering Lifeline-supported services to Lifeline subscribers.
- After providing subscribers with Lifeline-supported service, a service provider must submit a claim to receive reimbursement.
LCS User Accounts

- 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) can enter data, but does not have the authority to certify the claim
Questions?
How to File Claims
Process Overview
Process for Reimbursement Claims

• Access LCS through One Portal, USAC’s single sign-in dashboard for all USAC systems, including Lifeline systems

• Service providers must submit one reimbursement claim for each month they are claiming support through LCS
  • Action is required to submit the claim (even if there are no changes since last month)
  • Service providers have up to one year after the data month to submit original claims and upward revisions while downward revisions will continue to be accepted after the one-year period.

• In all states except California, Oregon, and Texas, a snapshot is taken in NLAD on the first of the month and shows the total number of subscribers eligible for reimbursement for the prior month
  • For example: a snapshot taken on February 1 shows the subscribers eligible to be claimed for the January data month

• In California, Oregon, and Texas, service providers can only claim subscribers listed on the file in LCS provided by their state Public Utility Commission (PUC).

• Receive Lifeline reimbursement in the same month if claim is certified by the eighth of the month
Help with One Portal

• To register your company for the first time
  • Visit One Portal and select “E-File”
  • Select “create an account” from the bottom menu
  • Select “Service Provider – 498 ID” and click “Register Your Company”

• To get a new One Portal account
  • Contact your company’s One Portal (E-File) “Officer” or “General Contact”

• If you are unsure who the officer is or need help with One Portal, email customersupport@usac.org
How to File Claim

1. Access LCS and download the Claims Input Template for a list of subscribers eligible for reimbursement

2. Modify the appropriate data on the list as needed

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)
### Reason Codes for Omitting a Subscriber from a Claim

- Service providers are required to provide a reason code for all unclaimed subscriber records

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>U1</td>
<td>Signed up for Lifeline, no usage yet</td>
</tr>
<tr>
<td>U2</td>
<td>Subscriber is in a non-usage cure period (snapshot date falls within the 15-day cure period)</td>
</tr>
<tr>
<td>U3</td>
<td>Subscriber lost eligibility but was not de-enrolled prior to snapshot</td>
</tr>
<tr>
<td>U4</td>
<td>Subscriber’s account is suspended</td>
</tr>
<tr>
<td>U5</td>
<td>Failed to match subscriber in ETC’s internal system</td>
</tr>
<tr>
<td>U6</td>
<td>Other</td>
</tr>
</tbody>
</table>
Questions?
Step by Step Process: Access One Portal
Step 1: Log In

- Log into One Portal
  - Reminder: LCS users must have 497 Officer or 497 User credentials in order to access the system
  - LCS is available from the One Portal homepage
Step 2: Select Claim Type

- From the File or Revise Claim page, users may file original claims or revise existing reimbursement claims.
  - For Original Claims: Select Month, Year, and “Original” Filing Type
  - For Revisions: Select Month, Year, and “Revision” Filing Type
Step by Step Process: File an Original Claim
Step 3: Select Month, Year, Filing Type

- The “SAC Status” chart shows the total counts of SAC(s) available for each status
- LCS users will only see the SACs delegated to their user accounts

**SAC Status Descriptions**

- **Not started**: SAC(s) available to file an original claim in LCS
- **Uploaded**: SAC(s) for which subscriber data was successfully uploaded in LCS with no errors
- **Ready to Certify**: SAC(s) with uploaded data in LCS ready to be certified by the 497 Officer
- **Certified**: SAC(s) with uploaded data in LCS that were certified by the 497 Officer
Step 4: Download Template

• Download the filing template (Claims_Input_Template.csv file) for each month they are claiming support

• From the “File Claim” page
  1. Download a new filing template
  2. Upload a Claims Input template
  3. Review uploaded data
  4. Review Support Summary and submit claims for certification
Step 5a: Upload Template and Review Data

- Review the [LCS Upload Field Descriptions](#) for details on each header in the claims template and how to populate the corresponding columns

Reviewing Uploaded Data

- After each successful upload, a “Detailed Summary” report - Subscribers_Rates_mmyyyy.csv (month/year) will be available to download

- The summary includes all SAC(s) that were successfully uploaded in LCS for the selected data month
  - Service providers can use that file to review their uploaded subscribers’ rates and Tribal Link up Charges waived, and make edits for resubmission
Step 5a: Upload Template and Review Data

Reviewing Support Summary and Submitting Claims for Certification

• Once service providers successfully upload their subscribers’ rates and Tribal Link up Charges waived for all SAC(s), they will need to review the summary of all claimed support per SAC before submitting the filings to the 497 Officer to certify.

• To view the “Support Summary” breakdown, from the “File Claim” page, click on the link “View Support Summary” located at the bottom of the page.
Step 5b: Resolve Upload Errors

- Users will receive an error notification if the **Claims Input Template** gets uploaded with errors; template must be revised before re-upload.
- The error file name appears in following format: `mm_dd_yyy_hhmm_error.csv`
  - `mm`: month
  - `dd`: day
  - `yyy`: year
  - `hh`: hour (24 hour format)
  - `mm`: minute
Step by Step Process:
Revise a Claim
Step 3: Select Month, Year, Filing Type

- The “SAC Status” chart shows the total counts of SAC(s) available for each status
- LCS users will only see the SACs delegated to their user accounts

SAC Status Descriptions

- **Ready to Revise**: SAC(s) available to revise a claim in LCS
- **Uploaded**: SAC(s) for which subscriber data was successfully uploaded in LCS with no errors
- **Ready to Certify**: SAC(s) with uploaded data in LCS ready to be certified by the 497 Officer
- **Certified**: SAC(s) with uploaded data in LCS that were certified by the 497 Officer
Step 4: Download Template

- To submit a revised claim, click on the link to download the most current filing template located at the top right corner of the “Revise Claim” page

  1. Download the most current filing template
  2. Upload a Claims Input template
  3. Review uploaded data
  4. Review Support Summary and submit claims for certification
Step 5a: Upload Template and Review Data

- “Filter Claims By” drop-down: LCS users can use this drop-down option to filter filings by SAC status - Ready to revise, and Revision In progress (Uploaded, Ready to Certify, Certified)
- “Keyword Search Box”: LCS users can use this sort option to look up service providers by name or to filter the “Subscriber Counts” table by service provider
- For every successful upload, the “Subscriber Counts” table is updated in real time and will reflect the latest uploaded Claims_Input_Template.csv changes
Step 5a: Upload Template and Review Data

- After each successful upload, a “Detailed Summary” report - Subscribers_Rates_mmyyyy.csv (month/year) will be available to download
- The Detailed Summary includes all SAC(s) that were successfully uploaded in LCS for the selected data month
- Service providers can use that file to review their uploaded subscribers’ rates and Tribal Link up Charges waived, and make edits for resubmission
Step 5b: Resolve Upload Errors

- For every unsuccessful upload, service providers will be able to download an error file to review the Claims_Input_Template.csv failures.

- The error file name appears in the following format: mm_dd_yyyy_hhmm_error.csv
  - mm: month
  - dd: day
  - yyyy: year
  - hh: hour (24 hour format)
  - mm: minute

Revise Claim

January 2020
Filing Data

There are errors in the file you last uploaded. Please make necessary changes and upload the file again.
Download the error file: 08_28_2021_1611_error.csv

Upload Data
File format must be .csv

Download most current filing template
Step by Step Process: Submit Claims to Certify
Step 6: Submit Claims to Certify

- From the “Support Summary” page
  1. View “Support Details” at the SAC level
  2. Select SAC(s) filings to submit to the 497 officer to certify

- To submit a claim to the 497 Officer to certify
  1. Click on the checkbox under the “Ready to Submit” column to make your SAC selection(s)
  2. Click on the “Submit Claims to Certify” link at the bottom of the page

* LCS users are required to complete the contact information section before submitting claims to be certified
Questions?
Step by Step Process: Certify Claims
Step 7: Certify Claims

- LCS will generate the search results based on a user’s applied filters and display the available data for the selected Month and Year in the “SAC Status” section located at the bottom of the page

- **SAC Status Description**
  - **Ready to Certify**: SAC(s) with uploaded data in LCS ready to be certified by the 497 Officer
  - **Certified**: SAC(s) with uploaded data in LCS that were certified by the 497 Officer
  - The “SAC Status” breakdown includes both original and revised claims
  - Click “Continue” at the bottom of the page to begin certifying original and/or revised claim(s)
Step 7: Certify Claims

- After signing the certification, the Form 497 Officer completes the certification process by clicking on the “Certify Claims” button at the bottom of the page.
LCS Website Content

- Visit [USAC.org/Lifeline](https://www.usac.org/lifeline) for more information on LCS
  - **Lifeline Claims System (LCS) section**: background on the system and a step-by-step review of how to file claims
  - **Reimbursement FAQs**: commonly asked questions about the system
  - **LCS Upload Field Descriptions**: details on each header in the claims template and how to populate the corresponding columns
LCS Videos

• Watch the How to Submit Claims in LCS in NLAD States video

• Watch the How to Submit Claims in LCS in NLAD Opt-Out States video
LCS Training for NLAD Opt-Out States

- Review the [LCS Training: NLAD Opt-Out State Process](#) for more information about the claims process for all three states
- Review the [LCS Office Hours: NLAD Opt-Out State Process](#) for high-level information about this process
Help with LCS

- Email Form497@usac.org for questions about claims and disbursements
General Program Resources

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

- [Subscribe](#) to Lifeline’s monthly newsletter
  - Select “Lifeline Program Newsletter” in USAC’s subscription center
General Program Resources

- Service providers should email LifelineProgram@usac.org to connect with a program analyst for any questions about other Lifeline systems, program requirements, and processes
Questions?
Take Our Survey

• We want to hear about your webinar experience
• Expect an email from invites@mailer.surveygizmo.com with a unique survey link in 1-2 business days
• We appreciate your feedback