Lifeline December 2022 Monthly Webinar

December 14, 2022



Universal Service Administrative Co.

Disclaimer

To accommodate all attendees, real-time closed captions will be present during this presentation. 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 the webinar panel

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Meet Our Lead Trainers



Delante Cherry

Communications Specialist | Lifeline

Delante develops internal and external communications.



Hannah Fofana

Communications Specialist | Lifeline

Hannah develops internal and external communications for Lifeline and State/Fed partners.



Linnita Hosten

Senior Communications Specialist | Lifeline

Linnita develops external communications and creates content about Lifeline systems and program changes.

Meet Our Team



Kara Neesen

Supervisor of Communications

Kara supervises the Lifeline communications team.



Winta Woldu

Communications Specialist | Lifeline

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

Objectives

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

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...understand:

- How to navigate the online form
- The implications for record keeping

...be able to:

• Submit the FCC Form 555 to USAC electronically via USAC's E-File (One Portal)



Agenda

- Program Updates
- FCC Form 555 Overview
- Walkthrough of Online Form
- Resources

Program Updates

Program Updates

Voice-Only Phase-Out and Minimum Service Standards

On July 1, the Bureau extended the waiver pausing both the phase-out of Lifeline support for voice-only services and the increase in Lifeline minimum service standards for mobile broadband data capacity for one additional year, until at least December 1, 2023.

- The basic Lifeline support of \$5.25 remains available to eligible consumers who subscribe to voice-only service until at least December 1, 2023.
- The minimum service standard for mobile broadband data capacity will remain at 4.5 GB per month until at least December 1, 2023.

Program Updates COVID-19 Relief for Tribal Subscribers Extended through January 31, 2023

On September 30, 2022, WCB released an order further extending the waiver of the Lifeline recertification and reverification requirements for subscribers residing on Tribal lands through January 31, 2023.

• This order also extends the waiver of the Affordable Connectivity Program (ACP) recertification requirements for Tribal subscribers that participate in Lifeline and ACP. ACP recertification will commence for these subscribers after they have had an opportunity to complete the Lifeline recertification process.

FCC Form 555 Overview, Tips, & Implications for Recordkeeping

FCC Form 555 Overview

- Each year, service providers must submit the FCC Form 555, the "Annual Lifeline Eligible Telecommunications Carrier Certification Form"
 - Report recertification and non-usage
 - This year, the form is due to USAC, state commissioners, Tribal governments, and the FCC by **January 31.**
- The FCC Form 555 must be submitted to USAC electronically via USAC's <u>E-File (One Portal)</u>
- Carriers must also file a copy of their FCC Form 555 in the FCC's Electronic Comment Filing System, Docket 14-171, with their state regulatory commission, and relevant Tribal governments

FCC Form 555 Overview

- Required for all Lifeline program service providers
 - Includes providers that have a SAC assignment from USAC that has not been relinquished (even if the company has had subscribers and didn't file reimbursement claims in LCS during the year)
 - Includes providers where the National Verifier has fully launched
 - One form submission per SAC is required

FCC Form 555 Tips for Completing the FCC Form 555

- You must include information for every subscriber you de-enrolled for non-usage
- Service providers are still responsible for completing FCC Form 555 in states and territories where the National Verifier has launched
 - If you were not responsible for conducting any recertifications (due to being part of the National Verifier), you should put "0" in blocks A C for these subscribers
 - You must also complete blocks I L for any recertification conducted by the state administrator in California, Oregon, and Texas
 - If you were not required to conduct recertification but you still did, you must report the results for those subscribers

FCC Form 555 National Verifier Launches

Launch	Soft	Hard Launch	States and Territories
	Launch		
June 2018 launch	6/18/2018	11/4/2018	CO, MS, MT, NM, UT, WY
October 2018 launch	10/15/2018	1/15/2019	GU, HI, ID, ND, NH, SD
December 2018 launch	12/4/2018	3/5/2019	MO, NC, PA, TN
February 2019 launch	2/5/2019	5/7/2019	AK, AS, DC, DE, ME, MP, RI, VI
March 2019 launch	3/12/2019	6/11/2019	IN, KY, MI
June 2019 launch	6/25/2019	10/23/2019	AZ, CT, GA, IA, KS, NE, NV, NY, VA, VT, WV
October 2019 launch	10/11/2019	1/22/2020	AL, AR, LA, MA, MD, NJ, OK, PR*, SC, WA
		*6/23/2020 (PR)	
December 16, 2019 launch	12/16/2019	3/24/2020	FL, IL, MN, OH, WI
<u>December 20, 2019</u>	12/20/2019	11/18/2020	CA*, OR, TX
launch (NLAD opt-out states)		*12/18/2020 (CA)	

FCC Form 555 Implications for Recordkeeping

- Maintain documentation to support what is reported on the FCC Form 555
 - Subscribers eligible for recertification per month
 - De-enrollments for non-usage per month
 - Successful and failed recertifications by recertification method
- Recordkeeping Examples
 - Snapshot of anniversary dates per month
 - Results of database queries and other recertification efforts

FCC Form 555 Implications for Recordkeeping

- Reminder: Lifeline Rule Section 54.417 Recordkeeping
 - Keep each subscriber's recertification documentation (program/income/state database queries, signed form, etc.) for as long as they receive Lifeline service from that ETC, but for no less than the three full preceding calendar years

Questions?

Walkthrough of Online Form Online Filing Tips

Walkthrough of Online Form Online Filing Tips

- Use a recommended browser
 - Chrome
 - Firefox
 - Internet Explorer 10
- E-File credentials
 - User name = your email address
 - Permissions for the Online 555 are the same as for filing claims through LCS
 - Need help? <u>E-File User Guide</u> or call (888) 641-8722

Walkthrough of Online Form Logging In

- Log into <u>E-File (One Portal)</u> with your user name and password
- Accept USAC's system policy

	Universal Service Administrative Co.
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Username

Password

Forgot password?

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary and/or legal action.

Click the box to accept

By signing in, I accept the terms and conditions of the USAC system.

Sign In

Don't have an account? Create an account

Walkthrough of Online Form Select the Form

- After you are logged in, you will see the <u>E-File (One Portal)</u> Home screen
- Under the Lifeline section, choose "FCC Form 555"
 - E-File permissions for FCC Form 555 are the same as for filing claims through LCS
 - 497 Agent can complete the form
 - 497 Officer must certify the form

💾 Upcoming Dates	Lifeline	^	Help?
01/12 January 2022 2022 Monthly Webinar	National Verifier - All participating service providers use the National Verifier to help prospective consumers apply and verify eligibility for the		Send us a message Click here
02/09 February 2022 Monthly 2022 Webinar	federal Lifeline benefit or the Emergency Broadband Benefit Program (EBBP).		Call us (888) 641-8722
03/09 2022 Monthly Webinar	National Lifeline Accountability Database (NLAD) - Service providers enr Lifeline or EBBP subscribers in NLAD to identify recipients, prevent duplicate benefits, and track household usage. Service providers must register a subscriber in NLAD for a company to claim Lifeline or EBBP reimbursement.	oll	
see full calendar	National Lifeline Accountability Database Staging Environment - The NLAD staging environment allows Lifeline and EBBP providers to test system features.		
	Lifeline Claims System (LCS) - Lifeline service providers file monthly reimbursement claims using the Lifeline Claims System.		
	Emergency Broadband Benefit Program Claims System (EBBPCS) - Emergency Broadband Benefit Program service providers file monthly reimbursement claims using the EBBP Claims System.		
	EBBPCS Staging - Emergency Broadband Benefit Program service provid can test the process of filing monthly reimbursement claims using the EB Claims System.		
	FCC Form 555 - The FCC Form 555 reports company recertification results All Lifeline service providers must complete the form annually on or befor		
			2

Walkthrough of Online Form Choose Filing Method

- Single form entry
 - Select a state and SAC, then click "Search"
 - Demo of single-form entry
- Bulk Upload
 - Bulk upload and bulk certify are also available

Universal S Administra	
LIFELINE JSAC Home Lifeline Program FCC Form 5	
FCC FORM 555	FCC FORM 555 SEARCH
FCC Form 555 Search FCC Form 555 Bulk Certify	State: WI 🗸
FCC Form 555 Bulk Upload	SAC: Select All-
	Search
RETURN TO E-FILE	

Walkthrough of Online Form Find your SAC

- Locate the SAC you want to file for
 - Search results at the bottom of the screen
- In the "Actions" column on the right, select "New Entry"

Universal S Administrat	
	FCC Form 555 Menu FCC FORM 555 SEARCH
FCC FORM 555 FCC Form 555 Search FCC Form 555 Bulk Certify FCC Form 555 Bulk Upload	State: WI SAC: -Select All-
RETURN TO E-FILE E-File Home Page	Search

To view previous year information, click on the expand (+) button

					List of S	ACs based on Sea	arch Criteri	a			
	SAC	SPIN	Data Year	State	ETC Name	Updated Details	Version	Filing Status	View/Print	Submission Details	Action
+			2020	WI	Wisconsin RSA #7 Limited Partnership			Not Filed			New Entry

Walkthrough of Online Form Select Companies

- The companies included in your SAC are auto-populated based on last year's filing
 - Link to update information if needed
- Progress bar at top of screen

Universal Service	Lifeline	ckonanf@gmail.com	Log Out E-File
Carrier Information	1 Annual Recertification	 Summary	Certify ① Instructions
Form 55 Carrier Inf			
		SAC 9999999 USE	
Does the reporting Yes No	g company have affiliated ETCs? ⑦		
	ct to the non-usage requirements? ⑦		

Walkthrough of Online Form Affiliate Companies

- Select "yes" or "no" to whether the reporting company has affiliated ETCs
 - Tool tip explains affiliate criteria
- ETC names will autopopulate based on last year's filing

Holding Company Name N/A Need to update this information? Does the reporting company have affiliated ETCs? () Provide a list of all ETCs that are affiliated with the reporting ETC. Affiliation with be determined in accordance with Section 3(2) of the Communications Act. That Section defines 'affiliate' as 'a person that (directly or under common ownership or is under common ownership or is under common ownership or Control with, another person. '47 U.S.C. Section 153(2). See also 47 [X]

Walkthrough of Online Form Non-Usage

- Indicate whether the ETC is subject to the non-usage requirements
 - Does not assess or collect a monthly fee
- If yes:
 - Enter the number of subscribers de-enrolled for non-usage per month
- symbol is a tool tip; click/hover for more information

Yes No	f subscribers de-enrolled for non-usa	monthly fee from their Lifeline subscribers are subject to the on-usage requirements and must indicate the number of	
January	February	subscribers de-enrolled by month. ETCs that only assess a	
10	10	fee but do not collect such fees are subject to the non-usage requirements and must also indicate the number of	
March	April	subscribers de-enrolled by month.	
10	10		
Мау	June		
10	10		
July	August		
10	10		
September	October		
10	10		
November	December		
10	10		
Total Subscribers			
120			

Walkthrough of Online Form Subscribers Subject to Recertification

- Provide numbers per month
- Complete lines A and B:
 - A. Subscribers eligible for recertification (by anniversary month)
 - B. Subscribers de-enrolled prior to recertification attempts (by anniversary month)
- Line C is calculated automatically
 - C. Total number of subscribers ETC is responsible for recertifying

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Carrier Information		Annual Recertification		Summ	ary			Cert
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Form	555							
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		COLLOIL						
Subscribe		o recertificatio	on 🕜					
Report the numbe	rs subject to	o recertification	on by month (Jan	uary - Decemb	per).			
Report the number	rs subject to er of Lifeline subscrib gible for recertification	o recertification bers due for recertification on by anniversary mont	on by month (Jan h	-	-	Nov	Dec	Year Total
Report the numbe A. Subscribers eli Jan Feb	rs subject to er of Lifeline subscrit gible for recertification Mar Apr	O recertification bers due for recertification on by anniversary mont May Jun	on by month (Jan h Jul Aug	Sep	Oct	Nov	Dec	Year Total
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Report the number A. Subscribers elip Jan Feb B. Subscribers de Jan Feb 5	rs subject to er of Lifeline subscrit gible for recertification Mar Apr enrolled prior to rece Mar Apr d d	o recertificatio bers due for recertificatio on by anniversary mont May Jun 0 0 0 0 certification attempts May Jun	bin by month (Janu h Jul Aug Jul Aug	Sep 0 0 0	Oct g Oct	0 Nov	0 Dec	Year Tota
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Walkthrough of Online Form Method: Database

- If you have access to a **state or federal** database, complete lines D & E:
 - D. Subscribers who were recertified through state database access (by anniversary month)
 - E. List the data sources used to verify consumer eligibility
- **Do not** include state-administered recertification in this section
 - Examples: CA, OR, TX
 - 3rd party recertification in a later section

tate or	federal	databas	e									
). Subsc	cribers rea	ertified t	hrough ETC	access to s	tate or fee	deral data	abase by a	nniversa	ry month			
leport th	he numbe	r of eligil	ole subscrib	ers verified	through a	access to	state and	federal d	atabase.			
Jan	Feb	Mar	Apr	Мау	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Tota

Walkthrough of Online Form Method: Direct Contact

- Report subscribers you contacted directly
 - F. Total subscribers contacted (by anniversary month)
 - G. Subscribers who failed to recertify via ETC direct contact (by anniversary month)
 - H. Subscribers who **successfully** recertified via direct contact (by anniversary month)
- Include subscriber-initiated recertifications in this section

Jan	Feb	Mar	Apr	Мау	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year To
C Cuber												
	riborc why	a failed to r	rocortify th	rough ETC	direct out	reach atte	mot					
				nrough ETC								
				-				-response	to ETC's d	lirect outre	each attem	pt.
Report th	ne numbe	of Lifeline	e subscribe	ers de-enro	olled due to	o ineligibil	ity or non	-				-
				-				-response Sep	to ETC's c	direct outre Nov	each attemp Dec	-
Report th	ne numbe	of Lifeline	e subscribe	ers de-enro	olled due to	o ineligibil	ity or non	-				-
Report th	ne numbe	of Lifeline	e subscribe	ers de-enro	olled due to	o ineligibil	ity or non	-				pt. Year Tot
Report th	ne numbe	of Lifeline	e subscribe	ers de-enro	olled due to	o ineligibil	ity or non	-				-
Report th	Feb	Mar	Apr	May	Jun	o ineligibil Jul	ity or non Aug	-				-
Jan H. Subsc	Feb	Mar Mar	Apr Apr through E	May TC direct o	Jun Jun utreach at	Jul	Aug	Sep	Oct			-
Jan H. Subsc	Feb	Mar Mar	Apr Apr through E	May	Jun Jun utreach at	Jul	Aug	Sep	Oct			-
Jan	Feb	Mar Mar	Apr Apr through E	May TC direct o	Jun Jun utreach at	Jul	Aug	Sep	Oct			

Walkthrough of Online Form Method: Third Party

- Report subscribers whose eligibility was reviewed by a state administrator, **third party**, or USAC
 - I. Total subscribers contacted (by anniversary month)
 - J. Name of the third-party administrator that verified eligibility
 - K. Subscribers who **failed** as result of third-party recertification attempt for ineligibility or non-response (by anniversary month)
 - L. Subscribers **successfully** recertified by third party (by anniversary month)

J. Name of the third part		verify subscriber elig	gibility:			
		verify subscriber elig	gibility:			
		verify subscriber elig	gibility:			
		verify subscriber elig	yibility:			
Subscribers de-enrolle			2			
Subscribers de-enrolle			1			
<. Subscribers de-enrolle						
. Subscribers de-enroll	I I I I I I I					
C Subscribers de-enroll						
	d as result of third party	recertification atte	mpt			
Report the number of su	scribers de-enrolled as	result of ineligibility	or non-response	to outreach from a	a state administrat	tor, third p
administrator, or USAC.						
Jan Feb Ma	r Apr May	Jun Jul	Aug Sep	Oct N	lov Dec	Year Tota

Walkthrough of Online Form Results

- Total results are auto-populated for the year
 - Total subscribers de-enrolled
 - Total subscribers the ETC is responsible for recertifying

• Percent of subscribers de-enrolled

Results	
M. Total number of subscribers de-enrolled as a result of recertification Year Total (M = G + K)	
N. Total number of subscribers ETC responsible for recertifying Year Total (N = D + F + I)	
• O. Percent of subscribers due for recertification who were de-enrolled Year Total (O = M/N * 100)	
Save & Exit Back	Save & Continue

Walkthrough of Online Form Summary Page

- Review your entries
- Press "Continue" button
 - E-File permissions: 497 Officer can certify FCC Form 555

	m 555	
	mary	
A	Subscriber eligible for recertification by anniversary month	0
В	Subscriber de-enrolled prior to recertification attempts	0
с	Total number of subscribers ETC is responsible for recertifying	0
D	Total number of subscribers ETC access to state or federal database by anniversary month	0
E	Name of the data source(s) used to verify subscribers eligibility	
F	Subscribers contacted by ETC directly to recertify	0
G	Subscribers who failed to recertify through ETC direct outreach attempt	0
н	Subscribers who recertified through ETC direct outreach attempt	0
I	Subscribers whose eligibility was reviewed by state administrator, third party administrator or, USAC	0
L	Name of the third party administrator used to verify subscribers eligibility	
к	Subscribers de-enrolled as result of third party recertification attempt	D
L	Subscriber who recertified through state administrator, third party administrator or, USAC's recertification effort	D
м	Total number of subscribers de-enrolled as result of recertification	
N	Total number of subscribers ETC is responsible for recertifying	
0	Percent of subscribers due for recertification who were de-enrolled	

Walkthrough of Online Form Certification

• An officer of the company must initial and certify the form to complete the submission

USAC Home LIfeline Program	FCC Form 555		
Carrier	Annual	Summary	Certify
Information	Recertification	-	
		Certify	
Initial Ce	rtificatio	By signing below, I certify that the company listed abo	we is in the compliance with all federal Lifeline certification procedures.
 For purposes of this fili similar legal document 	ng, an officer is an occupar . An officer is a person who	I am an officer of the company named above. I am au	thorized to make this certification for the SAC listed above.
	I typically be president, vic f the filer is a sole proprieto	Signed,	
		Date	
I certify that the company	listed above has certificati		
the best of my knowledge	gram-based eligibility doc , the company was presen	Name and Title of Officer	
	is or her enrollment in Life bility by relying upon acce		
	olling a consumer in the Li pany named above. I am au	Email Address of Officer	
		Derron Completing this Form	
Initial		Person Completing this Form	
		Contact Phone Number	

Questions?

Resources

Resources

USAC is available to help you submit a successful FCC Form 555 filing

- Use the <u>supplemental information</u> for details about how to complete the form
- Read the tool tips inside the online form
- For help, contact For help, contact https://www.example.com https://www.example.com"/>https://www.example.com https://www.example.com"/>https://www.example.com https://www.example.com"/>https://wwww.example.com https://www.example.com"/>https://www.example.com https://www.example.com"/>https://www.example.com https://www.example.com"/>https://www.example.com https://wwww.example.com"/>https://wwww.ex

Resources Bulk Upload

- Bulk upload is designed to make filing easier for users who are preparing FCC Forms 555 for multiple SACs
 - Excel template
 - Saves time if filing for multiple SACs
 - Available on the Lifeline Forms page of our website

Learn More About Lifeline

- <u>Sign up</u> for Lifeline email updates and upcoming events
- Need help? Contact us!
 - General inquiries: <u>LifelineProgram@usac.org</u>
 - FCC Form 555: Form555@usac.org

Take Our Survey



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

Thank You!

