Lifeline Claims System Overview

Lifeline Monthly Webinar

August 9, 2023
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• The audience will remain on mute
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• A copy of the slide deck is in the “Handouts” section of the webinar panel
Meet Our Presenters

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

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Hannah specializes in creating a variety of internal and external communications materials for stakeholders, consumer advocates, and state and federal partners.

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

• Announcements
• Introduction
• How to File Claims
  • Claim Reimbursement
  • Revise Claims
  • Certify Claims
• Resources
Objectives

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

**be able to:**

- Access the Lifeline Claims System (LCS), file an original claim in LCS, revise a claim in LCS and certify claims in LCS.

**understand:**

- The Lifeline claims system reimbursement process.
Announcements
Announcements
Voice-Only Phase-Out and Minimum Service Standards

- On July 7, the Wireline Competition Bureau (WCB or Bureau) paused the phase-out of Lifeline support for voice-only services for an additional year. As such, the basic Lifeline support of $5.25 remains available to eligible consumers who subscribe to voice-only service until at least December 1, 2024.

- The Bureau also paused the Lifeline minimum service standard for mobile broadband data capacity for an additional year. As such, the minimum service standard for mobile broadband data capacity will remain at 4.5 GB per month until at least December 1, 2024. On July 21, 2023, WCB released a public notice stating the fixed broadband minimum service standard for data usage will continue to be 1280 GB per month starting December 1, 2023.
Introduction
Introduction
System Overview

- The **Lifeline Claims System (LCS)** is the online filing system that service providers use to receive reimbursement for offering Lifeline-supported services to eligible Lifeline subscribers.

- After providing subscribers with Lifeline-supported service, a service provider must submit a claim to receive reimbursement.

- Service providers must submit one reimbursement claim for each month they are claiming support through LCS. Service providers have up to one year after the data month to submit original claims and upward revisions.
Introduction
LCS User Accounts

• LCS User Account Types:
  • A **497 Officer** can enter data, is authorized to certify the claim 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.
How to File Claims
Program Updates
Enhancements to the LCS

• On June 21, 2023, USAC released enhancements to improve the LCS data upload process for service providers. Providers are no longer required to include all subscribers for a given Study Area Code (SAC) when uploading a claims template.

• Service providers can now upload smaller batches of subscribers. This new process is referred to as the “partial upload process.” All rows in a claims template that successfully pass row level validations are saved, and do not need to be resubmitted if other rows have errors or if the system encounters an error before the file completes processing.
Program Updates
Enhancements to the LCS

- A new download template is available so that providers can identify which subscriber entries are missing a reimbursement rate. A new SAC status called “Partially Uploaded” will indicate if some, but not all subscribers in a SAC, have a reimbursement rate.
- The new functionality is **optional**, so providers can continue to file Lifeline claims using the same process they were already using.
Process Overview
How to File Claims
Process for Reimbursement Claims

• Users can access LCS through One Portal, USAC’s single sign-on dashboard for all USAC systems, including Lifeline systems.

• Service providers must submit one reimbursement claim for each month they claim support through LCS.
  • Action is required to submit the claim (even if there are no changes since last month).

• 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, 2023 shows the subscribers eligible for reimbursement for the January 2023 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).

• Service providers receive Lifeline reimbursement in the same month if the claim is certified by the 8th of the month.
How to File Claims
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 Claims

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 in LCS

4. Set the claim as “ready to certify”

5. Certify the submission (497 Officer must complete this step)
How to File Claims
Reason Codes to Omit a Subscriber From a Claim

- Service providers are required to provide a reason code for all unclaimed subscriber records. Reason codes should accurately reflect the reason a subscriber is not claimed in a particular month.

<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>
Poll
Questions?
Step-by-Step Process: File an Original Claim
Claim Reimbursement Log In

• Log in to One Portal

• Select Lifeline Claims System (LCS) under the Lifeline section of the dashboard
  • Reminder: LCS users must have 497 Officer or 497 User credentials in order to access the system
Claim Reimbursement
Download Claims Template (1 of 2)

From the **File or Revise Claim** page, users can file an original claim or a revision

- Select the data month, year, and filing type
  - Search results will generate in the SAC Status section based on the applied filters
    - **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
  - Click **Continue** to begin filing

**Note**: The **Opt-Out State File or Revise Claim** page will only appear if the user has entitlements to SACs in CA, OR, and/or TX
Claim Reimbursement

Download Claims Template (2 of 2)

- To download the filing template, click on the **Download a new filing template** link
  - This list includes subscriber data from the NLAD subscriber snapshot report, which is taken on the 1st of the month
  - Subscriber data can be pulled for a specific SPIN/SAC
- Click **Download** to review the list of subscribers eligible for reimbursement.
Claim Reimbursement
Complete Claims Template (1 of 3)

• Populate the claims template with the required information for each subscriber record
  • Review the LCS Upload Field Descriptions for details on how to populate the claims template

• Save as a .csv file

• Select Upload File to submit the claims template
Claim Reimbursement
Complete Claims Template (2 of 3)

After each successful upload, the **Subscriber Counts** table updates to reflect the latest uploaded claims.

- View a detailed report by clicking on the **Download to review uploaded data** link
- Click on **View Support Summary** to review all SAC(s) that were successfully uploaded in LCS for the selected data month
Claim Reimbursement
Complete Claims Template (3 of 3)

- For an unsuccessful upload, users receive an error message and can download the error file to review the failures
  - Make the necessary changes and upload the claims file (containing all subscriber records, which includes the records that passed as well as those that failed) again
Step-by-Step Process: Revise a Claim
Revisions
Revise Claim Page

From the **File or Revise Claim** page, users can begin a revision

- **Select the data month, year, and filing type**
- **Search results will generate in the SAC Status section based on the applied filters**
  - **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
- **Click Continue** to begin a revision
Revisions
Revise Claim Page

- From the **File or Revise Claim** page, download the most current filing template to begin a revision
  - The template will include the most recent certified claims data
- Edit the template and click **Upload File** to begin a revision
  - Only subscribers with revisions should be included in the revised template
  - Upward and downward revisions can be made in the same file
Revisions
Revise Claim Page

- For an unsuccessful upload, users receive an error message and can download the error file to review the failures
- Make the necessary changes and upload the claims revision file (only subscribers with revisions should be included in the revised template) again
Step-by-Step Process:
Submit Claims to Certify
Claim Reimbursement
Submit Claim for Officer to Certify

From the **Support Summary** page, users can select filings to submit to the 497 Officer to certify

- Select the claims that are ready to be submitted
- Enter in the required contact information
- Click **Submit to Officer to Certify**
Poll
Questions?
Step-by-Step Process: Certify Claims
Claim Reimbursement
Certify Claims

• Only a 497 Officer can certify claims, log in to USAC’s One Portal to access LCS

• Under the Certify Claim page, select the Month and Year to certify original claims and revisions
  • SAC Status section includes the status of original and revised claims
    • 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

• Click Continue to begin certifying original and/or revised claim(s)
Claim Reimbursement

Certify Claims

- Select the claims that are ready to certify
- Click **View** under the Support Details column to confirm the information
Claim Reimbursement
Certify Claims

• Review the **Certify and Sign** page
  • Sign at the bottom of the page
  • Select **Certify Claims**
Warning Message for Service Providers Subject to Non-Usage Requirements

• 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?”
  *Note: If submitting a claim for a month between March 2020-April 2021, please click ‘no my filing is accurate’ and proceed”.

• This warning will not prevent LCS users from submitting their claim.
  • It encourages service providers to double check the data before submission and certification.
System Maintenance
NLAD Maintenance

- NLAD maintenance takes place on a regular basis.
  - NLAD is taken offline for scheduled system maintenance, typically completed on the third or fourth Saturday of each month.
- View the table on the NLAD Maintenance schedule page for 2023 NLAD maintenance dates.
- For more information regarding releases and upcoming NLAD changes, subscribe to the NLAD Bulletin email list.
Resources
LCS Website Content

- Visit USAC.org/Lifeline for more information on LCS:
  - Lifeline Claims System (LCS): 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.
Resources
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.
Resources
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.
Resources
Help with LCS

- Email Form497@usac.org for questions about claims and disbursements.
Resources
USAC’s Websites

• USAC has two websites available:
  • Lifeline’s consumer website: LifelineSupport.org
  • USAC’s Lifeline website for service providers, state and federal partners, consumer advocates, and Tribal partners: usac.org/lifeline
Resources
Lifeline Support Center

- Email: LifelineSupport@usac.org

- Call: (800) 234-9473 (press 1 for English; press 2 for Spanish)
Resources
Lifeline Support Center

• **Hours:** 7 days a week, from 9:00 a.m. to 9:00 p.m. ET

• **Support:**
  • Consumers with disabilities who need help submitting a Lifeline application may contact the support center for assistance
  • Consumer support representatives are able to provide assistance in English and Spanish
  • USAC offers a translation services vendor to provide assistance in up to an additional 200 languages in instances where the service is needed
Resources
Lifeline Program Team

- Service providers, state and federal partners, consumer advocates, and Tribal partners who need assistance outside of helping consumers with the application process should email LifelineProgram@usac.org to connect with a program analyst about:
  - Technical issues or system questions
  - Processes, rules, and requirements.
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
Thank You!