

Lifeline Claims System Overview

Lifeline Monthly Webinar

August 9, 2023



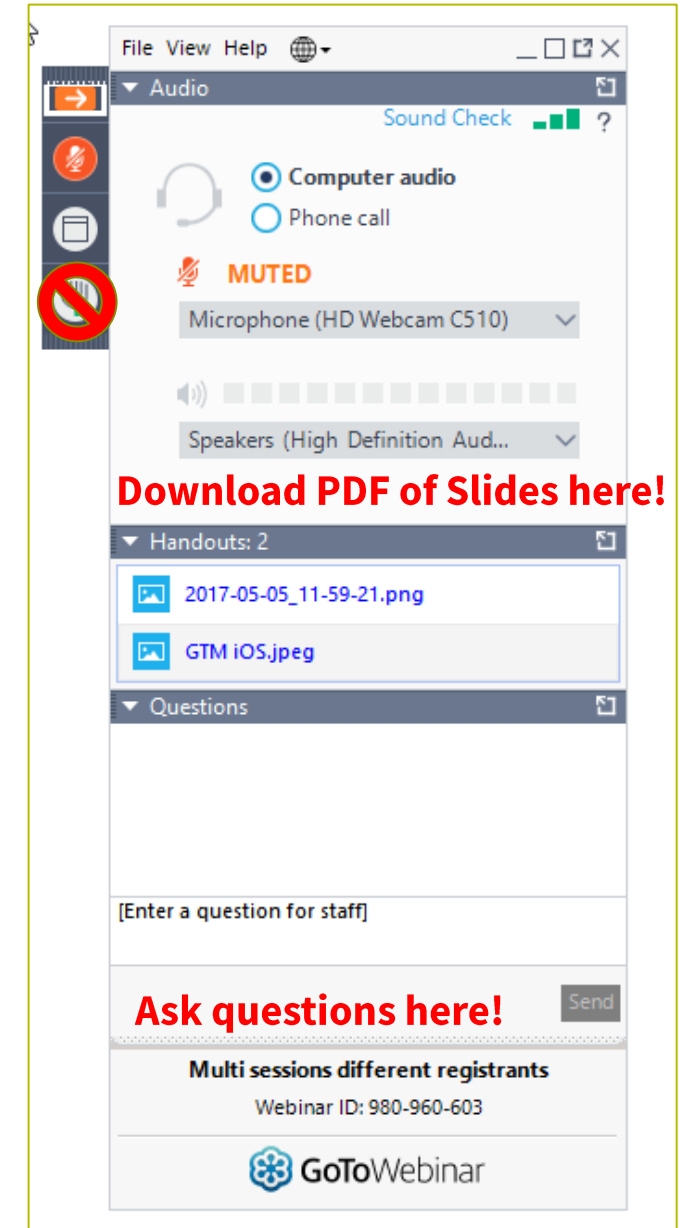
Universal Service
Administrative Co.

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



Meet Our Presenters



Winta Woldu

Communications Specialist

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



Hannah Fofana

Communications Specialist

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



Linnita Hosten

Senior Communications Specialist

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

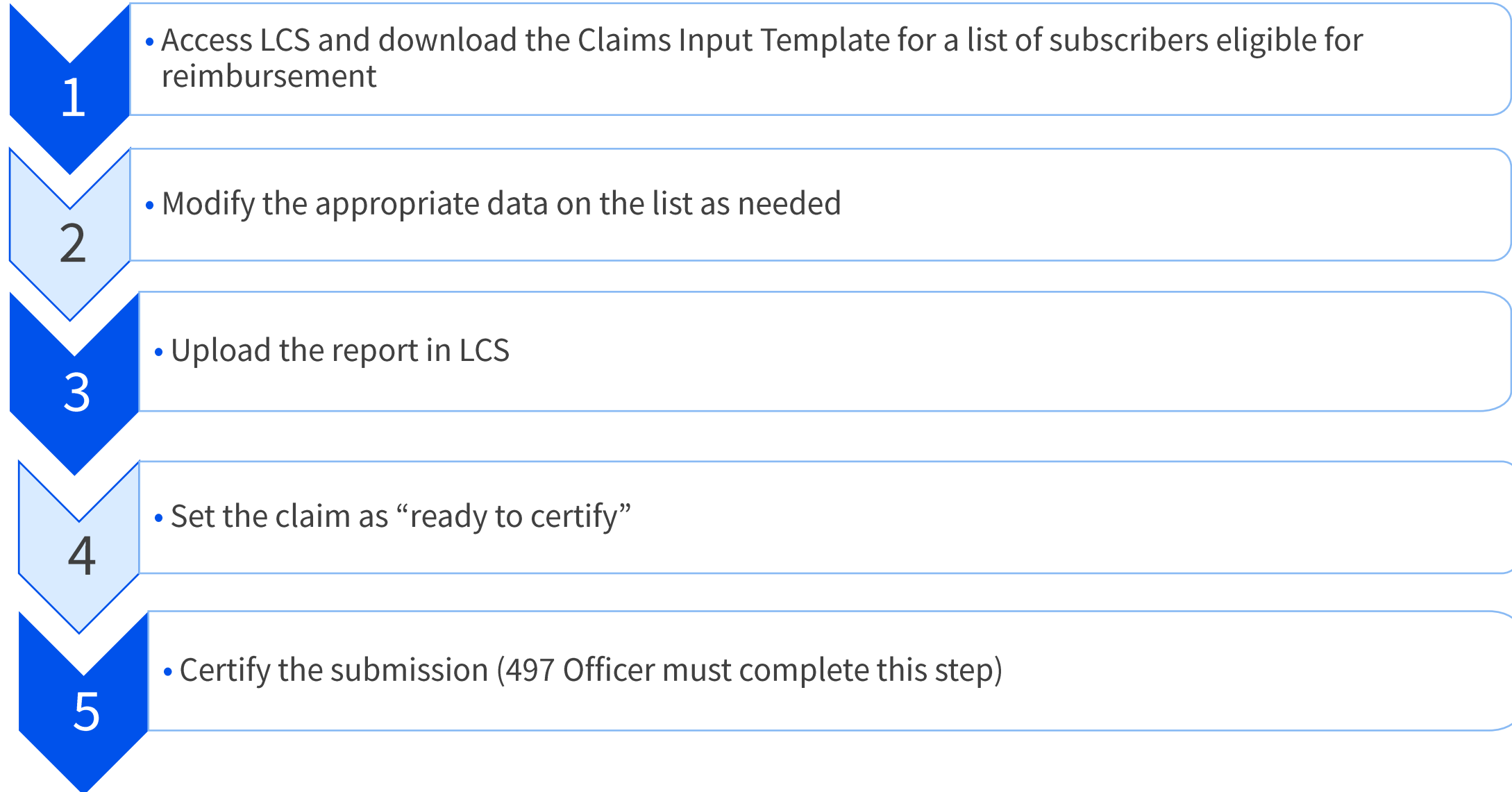
- Users can access LCS through [One Portal](#), USAC's single sign-on dashboard for all USAC systems, including Lifeline systems.
- Service providers must submit one reimbursement claim for each month they claim support through LCS.
 - Action is required to submit the claim (even if there are no changes 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



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.

Code	Description
U1	Signed up for Lifeline, no usage yet
U2	Subscriber is in a non-usage cure period (snapshot date falls within the 15-day cure period)
U3	Subscriber lost eligibility but was not de-enrolled prior to snapshot
U4	Subscriber's account is suspended
U5	Failed to match subscriber in ETC's internal system
U6	Other

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

Dashboard

 In accordance with the Supply Chain orders, new certifications have been added to the following forms: RHC - FCC Form 463 and the Telecom invoice, E-rate - FCC Form 473, and High Cost & Lifeline - FCC Form 481. Service providers are required to submit these annual certifications. For additional information, visit the [USAC Supply Chain](#) page.



Upcoming Dates

08/09
2023 [August 2023 Monthly Webinar](#)

09/13
2023 [September 2023 Monthly Webinar](#)

[See full calendar](#)

High Cost

Lifeline

National Verifier - All participating service providers use the National Verifier to help prospective consumers apply and verify eligibility for the federal Lifeline benefit or the Affordable Connectivity Program (ACP).

National Lifeline Accountability Database (NLAD) - Service providers enroll Lifeline or ACP 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 ACP reimbursement.

National Lifeline Accountability Database Staging Environment - The NLAD staging environment allows Lifeline and ACP providers to test system features.

Lifeline Claims System (LCS) - Lifeline service providers file monthly reimbursement claims using the Lifeline Claims System.

Help?

[Send us a message](#)
[Click here](#)

Call us
(888) 641-8722

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

[File or Revise Claim](#)
[Opt-Out State File or Revise Claim](#)
[Certify Claim](#)
[Filing History](#)

[Instructions](#)

File or Revise Claim

Select a month to file or revise a claim.

Month
January

Year
2022

Filing Type
Original

January 2023

SAC Status	
Not Started	1
Uploaded	0
Ready to Certify	0
Certified	0

Continue

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.

[File or Revise Claim](#) [Opt-Out State File or Revise Claim](#) [Certify Claim](#) [Filing History](#)

File Claim

[Instructions](#)

January 2023

Filing Data

Upload Data
File format must be .csv
[Upload File](#)

[Download a new filing template](#)

Subscriber Counts
Displaying 1 to 1 of 1 records

SPIN ▼	SAC	Name	Status	Non-Tribal Reported	Non-Tribal Claimed	Tribal Reported	Tribal Claimed	Total Reported	Total Claimed	Tribal Link-up
143000013	199018	Cox Virginia Telecom LLC	Not Started	244	0	0	0	244	0	0

Show records/page < 1 > of 1 pages

[Download to review uploaded data](#)

[Back to Search](#) [View Support Summary](#)

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

File or Revise Claim Opt-Out State File or Revise Claim Certify Claim Filing History

[Instructions](#)

File Claim

January 2023

Filing Data

Last updated 02/24/22 12:52 PM EST

You successfully uploaded claims_input_template - 2022-02-24T12:52:31.330.csv

Upload Data [Download a new filing template](#)

File format must be .csv

Upload File

Subscriber Counts

Displaying 1 to 1 of 1 records

Type a keyword to search

SPIN	SAC	Name	Status	Non-Tribal Reported	Non-Tribal Claimed	Tribal Reported	Tribal Claimed	Total Reported	Total Claimed	Tribal Link-up
143000013	199018	Cox Virginia Telecom LLC	Uploaded	244	244	0	0	244	244	0

Show 5 records/page

[Download to review uploaded data](#)

[Back to Search](#) [View Support Summary](#)

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

[File or Revise Claim](#)
[Opt-Out State File or Revise Claim](#)
[Certify Claim](#)
[Filing History](#)

[Instructions](#)

File Claim

January 2023 Filing Data

Last updated 02/24/22 12:52 PM EST

✔ You successfully uploaded claims_input_template - 2022-02-24T123731.339.csv

Upload Data

No format must be .csv

[Download a new filing template](#)

[Upload File](#)

Subscriber Counts

Displaying 1 to 1 of 1 records

SPIN	SAC	Name	Status	Non-Tribal Reported	Non-Tribal Claimed	Tribal Reported	Tribal Claimed	Total Reported	Total Claimed	Tribal Link-Up
143000013	199015	Cox Virginia Telecom LLC	Uploaded	244	244	0	0	244	244	0

Show 5 records/page

[Download to review uploaded data](#)

[Back to Search](#)
[View Support Summary](#)

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

File Claim

[Instructions](#)

July 2023

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_19_2021_1800_error.csv](#)

Upload Data

[Download a new filing template](#)

File format must be .csv

[Upload File](#)

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

[File or Revise Claim](#)
[Opt-Out State File or Revise Claim](#)
[Certify Claim](#)
[Filing History](#)

[Instructions](#)

File or Revise Claim

Select a month to file or revise a claim.

Month

January

Year

2023

Filing Type

Revision

January 2023

SAC Status	
Ready to Revise	1
Uploaded	0
Ready to Certify	0
Certified	0

Continue

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

Revise Claim

[Instructions](#)

January 2023

Filing Data

Upload Data

File format must be .csv

[Upload File](#)

[Download most current filing template](#)

Subscriber Counts

Displaying 1 to 1 of 1 records

Filter claims by

Ready to Revise

Type a keyword to search

SPIN	SAC	Name	Status	Non-Tribal Last Claimed	Non-Tribal Revised Claim	Tribal Last Claimed	Tribal Revised Claim	Total Last Claimed	Total Revised Claim	Revised Tribal Link-up
143000013	199018	Cox Virginia Telecom LLC	Ready To Revise	243	0	0	0	243	0	0

Show 5 records/page

< 1 > of 1 pages

[Download to review uploaded data](#)

[Back to Search](#)

[View Support Summary](#)

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

Revise Claim

[Instructions](#)

January 2023

Filing Data

Last updated 03/03/22 1:25 PM EST

ⓘ There are errors in the file you last uploaded. Please make necessary changes and upload the file again.
Download the error file: 03_03_2022_1327_error.csv

Upload Data

[Download most current filing template](#)

File format must be .csv

[Upload File](#)

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**

[File or Revise Claim](#) [Opt-Out State
File or Revise Claim](#) [Certify Claim](#) [Filing History](#)

File Claim

[Instructions](#)

January 2023

Support Summary

Displaying 1 to 1 of 1 records

☒ Select All

Filter claims by

Uploaded

Type a keyword to search

Ready to Submit	SPIN	SAC	Name	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input checked="" type="checkbox"/>	143000013	199018	Cox Virginia Telecom LLC	Uploaded	\$1,281	\$0	\$1,281	View

Show

5

 records/page

< 1 > of 1 pages

Please fill out the following information in case we need to contact you with any questions about your claim.

Contact Name

Test Tester

Contact Phone Number

(123) 456-7890

Contact E-mail Address

497officer@test.org

Address 1

123 Main Street

Address 2

City

Test City

State

AL

Zip

12345

[Home](#) [Back to Subscriber Counts](#) [Submit Claims 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)

File or Revise Claim Opt-Out State File or Revise Claim **Certify Claim** Filing History

Certify Claim [Instructions](#)

Select a month to certify.

Month: Year:

January 2023

SAC Status

Ready to Certify	1
Certified	0

Continue

Claim Reimbursement

Certify Claims

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

File or Revise Claim Opt-Out State
File or Revise Claim **Certify Claim** Filing History

Certify Claim [Instructions](#)

January 2023
Claims to Certify
Displaying 1 to 1 of 1 records

☒ Select All Filter claims by Ready to Certify

Ready to Certify	SPIN	SAC	Name ▼	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input checked="" type="checkbox"/>	143000013	199018	Cox Virginia Telecom LLC	Ready to Certify	\$1,281	\$0	\$1,281	View PDF

Claim Reimbursement

Certify Claims

- Review the **Certify and Sign** page
 - Sign at the bottom of the page
 - Select **Certify Claims**

Certify and Sign

I certify that my company is in compliance with all of the Lifeline program rules, and, to the extent required, have obtained valid certifications for each subscriber for whom my company seeks reimbursement.

I certify that my company will pass through the full amount of all Non-Tribal and Tribal federal Lifeline support for which it seeks reimbursement, as well as all applicable intrastate Lifeline support, to all qualifying low-income subscribers by an equivalent reduction in the subscriber's monthly bill for supported service, or by offering a pre-paid wireless plan that complies with the appropriate minimum service standards contained in 47 CFR §54.408.

Based on the information known to me or provided to me by employees responsible for the preparation of the data being submitted, I certify under penalty of perjury that the data has been examined and reviewed and is true, accurate, and complete.

I acknowledge the Fund Administrator's authority to request additional supporting information as may be necessary.

Persons willfully making false statements on this form can be punished by fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. §1001.

Date
08/20/2021

Officer Name

Officer Title

[Back to Search](#)[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

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

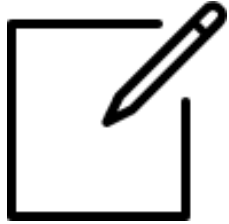
Resources

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@mailersurveygizmo.com with a unique survey link in 1-2 business days
- We appreciate your feedback

Thank You!

