Using the Lifeline Claims System (LCS)

June 12, 2024
Housekeeping

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- The audience will remain on mute.
- Enter questions at any time using the “Questions” box.
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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!
Meet Our Team

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

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

• Announcements
• Lifeline Claims Overview
  • Filing Claims
  • Certifying Claims
  • Revising Claims
• Resources
Announcements
Reverification Update

- Reverification is the one-time process to confirm that all subscribers enrolled in the Lifeline program through legacy processes (i.e., pre-National Verifier processes) meet the National Verifier’s eligibility standards.

- The submission window for document collection is open for **Group Three**. This group includes specific Study Area Codes (SACs):
  - 489014
  - 499011
  - 499016
  - 509014
  - 499001
  - 509002
  - 459024
  - 459001
Announcements
Reverification Update

• Service providers in **Group Three** should:
  • Review the **Reverification Subscriber Status Report** in the National Lifeline Accountability Database (NLAD) to identify which consumers need to reverify, what failures are remaining, and review document requirements for those failures.
  • Collect on-hand documentation and conduct consumer outreach to obtain documentation.
• Final documentation is due by June 28, 2024.
Announcements
Reverification Update

- USAC is also performing direct consumer outreach to subscribers who require additional documentation to complete their reverification in the following groups:
  - **Group Two**: Puerto Rico, California (broadband only), Florida, Illinois, Minnesota, Ohio, and Wisconsin.
  - **Group Four**: All states/territories.
- Final documentation for subscribers in Group Two and Group Four is due mid-July.
Announcements
Reverification Update

• Consumers who fail to successfully complete the reverification process will be de-enrolled and mailed a de-enrollment notice.

• Service providers are encouraged to monitor the Failed Reverification De-Enroll Report in the NLAD to see which subscribers failed the reverification process and have been de-enrolled.

• For more information on the Lifeline reverification process, providers can visit the Reverification page.
Announcements
New Lifeline Mailing Address

• On **June 1, 2024**, the Lifeline Support Center mailing address transitioned to PO Box 1000 Horseheads, NY 14845.

• Mail sent to the previous address will be forwarded to the new mailing address for one year.
Lifeline Claims Overview
Lifeline Claims Overview

Review Claims
Download and review list of subscribers eligible for reimbursement.

Complete Claims Template
Populate and submit template with necessary information about subscribers.

Certify Claims
Certify claims submission within one year of the snapshot date (taken on 1st of the month.)
Lifeline Claims Overview

- The Lifeline Claims System (LCS) is the online filing system that service providers use to receive reimbursements for offering Lifeline-supported services to eligible consumers.
- After providing eligible consumers 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.
Lifeline Claims Overview

Reimbursement

- Service providers must submit one reimbursement claim for each month they claim support, even if there are no subscriber changes within the last month.

- A snapshot is taken in The National Lifeline Accountability Database (NLAD) on the 1st of the month and shows the total number of subscribers eligible for reimbursement for the prior month.
  - For example: a snapshot taken on June 1, 2024, shows the subscribers eligible for reimbursement for the May 2024 data month.

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

- Claims certified by the 8th of the month are processed for reimbursement in the same month.
Lifeline Claims Overview
Omitting Subscribers 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>
Lifeline Claims Overview
Pass Through Requirement

- Service providers are required to pass through the full benefit amount to qualifying consumers.
  - **Standard Benefit**: Monthly discount up to $9.25 for internet and bundled service and up to $5.25 for phone service.
  - **Enhanced Tribal Benefit**: Monthly discount up to an additional $25 for consumers living on Tribal lands.
Filing Claims
## Filing Claims

### User Accounts and Responsibilities

<table>
<thead>
<tr>
<th>497 Officer</th>
<th>497 User</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Document Icon]</td>
<td>![List Icon]</td>
</tr>
<tr>
<td>• Must certify reimbursement claims, and can upload, modify, and submit claims.</td>
<td>• Can upload, modify, and submit claims, but <strong>cannot</strong> certify claims.</td>
</tr>
</tbody>
</table>

### Eligible Telecommunications Carriers (ETCs) that participate in Lifeline:

- The 497 Officer and 497 User roles are assigned and managed in E-file, which can be accessed through USAC’s [One Portal](#) system.
Filing Claims
Log In

- Once logged into One Portal, select Lifeline Claims System (LCS).
  - **Reminder:** LCS users must have 497 Officer or 497 User credentials to access LCS.
Filing Claims

• From the **File or Revise Claim** page, providers 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.
  
  • New SAC Status for **Partially Uploaded**.
  
  • Select **Continue** to begin filing.

**Note:** The claims template is typically available for download after 11:30 a.m. ET on the 1st of the month.
Filing Claims

- Search results will generate in the Study Area Code (SAC) Status section based on the filters below:
  - **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.
- Select **Continue** to begin filing.
Filing Claims

- Select **Download original filing template**.
  - The template includes subscriber data from the NLAD subscriber snapshot report, which is taken on the 1\textsuperscript{st} of the month.
  - Subscriber data can be pulled for a specific SPIN/SAC.
- Select **Download to Review Uploaded Data** to view the list of subscribers eligible for reimbursement.
Filing Claims

- Complete 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.
Filing Claims

- 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.
- Select View Support Summary to review all SAC(s) that were successfully uploaded in LCS for the selected data month.
Filing Claims

- Unsuccessful uploads will display an error message. Download the error file to review the failure(s).
- To resolve the error(s), make the necessary changes and reupload the claims file.
  - Be sure the updated claims file contains all subscriber records, including the records that were previously successfully submitted.
Filing Claims

• 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 and enter required contact information.
  • Select **Submit to Officer to Certify**.
Questions?
Certifying Claims
Certifying Claims

Only a 497 Officer can certify claims.

- As a 497 Officer, navigate to the **Certify Claim** page.
- Select the month and year to certify original claims and revisions.
- Review the SAC Status section which 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.
- Select **Continue** to begin certifying original and/or revised claim(s).
Certifying Claims

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

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

**Note:** Claims must be certified (not just uploaded) by the 8th (or next business day if the 8th falls on a weekend or holiday) to receive payment at the end of the same month.
Revising Claims
Revising Claims

A **revision** is when the provider submits and certifies an original filing, but then makes changes to it in a later filing period.

- Service providers use the same filing process as original claims for revisions.
- Revisions are available beginning the first day of the next filing period after an original claim is certified.
- To revise a claim, from the **File or Revise Claim** page, select the data month, year, and filing type.
- Select **Continue** to begin a revision.
Revising Claims

- From the **File 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 select **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.
    - Upward revisions are only allowed within one year of the snapshot, there is no time restriction for downward revisions.
Revising Claims

• Unsuccessful uploads will display an error message. Download the error file to review the failure(s).

• To resolve the error(s), make the necessary changes and reupload the claims file.
  • Be sure the updated claims file only includes revised subscriber data.
Resources
Resources

• For more information on the LCS view:
  • Lifeline Claims System (LCS)
  • Lifeline Claims System User Guide
  • Reimbursement FAQs
  • LCS Upload Field Descriptions

• View Instructional Videos:
  • How to Submit Claims in LCS in NLAD States
  • How to Submit Claims in LCS in NLAD Opt-Out States

• Email Form497@usac.org for questions about claims and disbursements.
Questions?
Thank You!