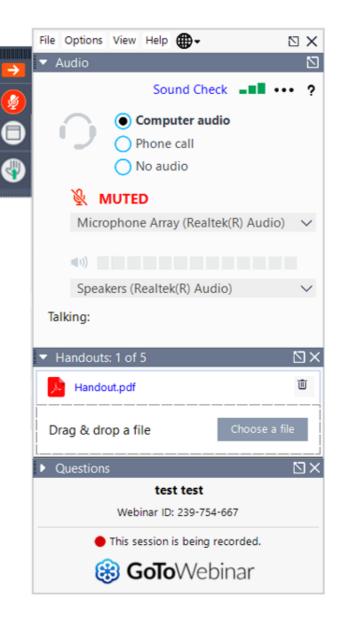


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- Audio is available through your computer's speakers.
- The audience will remain on mute.
- Enter questions at any time using the "Questions" box.
- If your audio or slides freeze, restart the webinar.
- A copy of the slide deck is in the "Handouts" section of the webinar panel.



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

Linnita Hosten

Senior Communications Specialist

Oladotun Adio

Communications Specialist

Agenda

- Announcements
- Introduction
- Lifeline ETC Designation Overview
- Post ETC Designation
- Accessing E-File
- Resources

Announcements

Announcements

New Continued Eligibility Report

- On **May 21, 2025**, USAC will implement a new, updated, streamlined, and unified Continued Eligibility Status Report in the National Lifeline Accountability Database (NLAD) production environment.
- The new report includes a new error code and an updated description type. The report is available for service
 providers to test in the staging environment.
- The new error code is as follows:
 - INVALID_STATUS_PARAMETER_CE: The status must be one or all of the following values: confirmed, in progress, deenrolled, all.
- The updated description for Continued Eligibility Type Error Code is as follows:
 - INVALID_STATUS_PARAMETER_CE: The status must be one or all of the following values: confirmed, in progress, deenrolled, all.
- Additional details about the enhancement can be viewed in a previous <u>Lifeline bulletin announcing the update</u>.

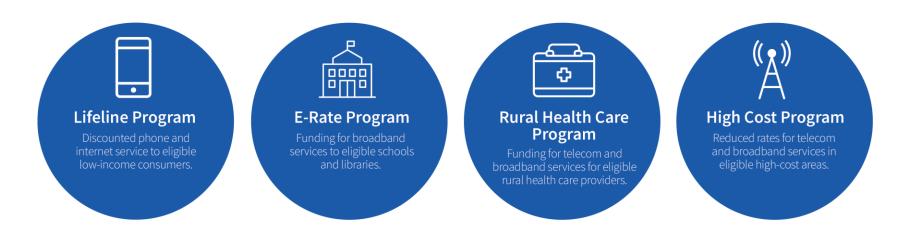
Announcements

2025 Federal Poverty Guidelines

- The <u>2025 Federal Poverty Guidelines (FPGs)</u> are now available. These guidelines are used to determine if a consumer can qualify for Lifeline through their income.
 - To qualify for Lifeline through income, a consumer's gross household income must be at or below 135% of the FPGs.
- USAC has updated the Lifeline application and recertification forms, consumer outreach materials (mail and email), and website content to reflect 135 % of the 2025 FPGs.
- Service providers should update their forms and systems as soon as possible.
- Service providers in opt-out states (<u>California, Texas, and Oregon</u>) that have state-issued forms should follow their state's guidance.

USAC Overview

- USAC is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC) as the permanent administrator of the Universal Service Fund (USF) and its four programs.
 - The USF aims to ensure that all people in the United States have access to quality, affordable connectivity service.
 - The FCC develops policies and regulations for all four programs and provides guidance to USAC.
 - USAC administers the programs and educates stakeholders on processes, systems, and rules and requirements.



Lifeline Overview

- The Lifeline program is a federal benefit program that helps low-income households pay for phone or internet service.
- Eligible households can receive:

\$9.25 Standard Discount

Up to \$9.25/month discount for internet or bundled services or up to \$5.25/month for phone service that meets the minimum service standards.

\$34.25 Tribal Discount

Up to \$34.25/month discount for households on qualifying Tribal lands.

\$100 Link Up Discount

A one-time discount of up to \$100 off the initial setup fees at addresses on qualifying Tribal lands receiving voice service from certain service providers.

\$9.25 Survivor Benefit

A \$9.25/month discount for phone, internet, or bundled services for up to 6 months for <u>survivors who qualify</u>.

• The Lifeline benefit is limited to one monthly service discount per household.

How to Qualify for Lifeline (1/2)

Households can qualify for the **standard Lifeline** benefit in **three ways**:

- Household income at or below 135 percent of the Federal Poverty Guidelines.
- Participation in certain <u>federal assistance programs</u> such as SNAP, Medicaid, Supplemental Security Income, federal housing assistance, or Veterans Pension and Survivors Benefit.
- Participation in certain <u>Tribal assistance programs</u> (only available to households that live on Tribal lands) such as Bureau of Indian Affairs General Assistance, Head Start, Tribal Temporary Assistance for Needy Families (Tribal TANF), or Food Distribution Program on Indian Reservations.

How to Qualify for Lifeline (2/2)

Households can qualify for the Survivor benefit as follows:

- Qualifying survivors experiencing financial hardship who have attempted a line separation request can:
 - Confirm their financial hardship to participate in Lifeline by meeting <u>existing Lifeline criteria</u> or through the expanded qualification criteria below:
 - Household income at or below <u>200 percent of the Federal Poverty Guidelines</u>.
 - Enrollment in the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC).
 - Enrollment in the Free and Reduced-Price School Lunch or Breakfast program, including enrollment at a Community Eligibility Provision (CEP) school or school district.
 - Received a Federal Pell Grant in the current award year.
- Note: Survivors must include proof of an attempted <u>line separation request</u> from their mobile phone company.

- An Eligible Telecommunications Carrier (ETC) is a service provider authorized to offer Lifeline-supported services to qualifying consumers and can receive reimbursement for providing such services.
- Service providers must be designated as an ETC by their respective <u>state commission</u> or by the FCC.
- This presentation applies to the ETC designation process for Lifeline-only ETCs. The Commission's requirements concerning High-Cost ETC designations are different and are not discussed here.

To participate in and offer Lifeline-supported services, a service provider must:

Create a Compliance Plan

Become an ETC

Obtain a Study Area Code (SAC)

Obtain a 498 ID/SPIN

- Non-facilities-based resellers must submit a compliance plan to and obtain approval from the FCC.
- Compliance plan must outline how carrier will comply with Lifeline program rules.
- Submit ETC
 designation petition to
 the FCC or state
 commission.
- Upon approval, the FCC or state commission publishes the official order designating the provider as an ETC.
- Send an email to
 <u>LifelineProgram@usac.org</u> to request a Study Area Code (SAC).
- USAC issues one SAC per state per designation order.
- Request a 498 ID/SPIN or review existing 498 ID/SPIN.

Note: All ETCs must comply with Lifeline <u>program rules</u>.

Create and Submit a Compliance Plan (1/3)

- ETCs who will not provide service at least partially across their own facilities are required to submit a compliance plan with the FCC.
 - The Wireline Competition Bureau's Lifeline Compliance Plan Guidance <u>Public Notice</u> outlines compliance plan requirements.
- Providers that are facilities-based or offer a combination of facilities-based and non-facilities-based services are not required to have a compliance plan approved by the FCC.

Create and Submit a Compliance Plan (2/3)

- The compliance plan must include the following information about the service provider and the Lifeline plans it intends to offer:
 - The names and identifiers used by the service provider, its holding company, operating company and all affiliates.
 - Detailed information demonstrating that the service provider is financially and technically capable of providing the supported Lifeline service.
 - Geographic locations of the service provider's current service offerings if the service provider currently offers service.
 - Terms and conditions of each Lifeline service plan offering, including rates, the number of minutes provided, and additional charges.

Create and Submit a Compliance Plan (3/3)

- Additional compliance plan requirements are under section <u>54.202</u> of the FCC's rules, and they include:
 - Demonstrating the ability to remain functional in emergency situations.
 - Demonstrating the ability to satisfy applicable consumer protection and service quality standards.
 - Certifying compliance with the service requirements applicable to the support that it receives.
 - Submitting a five-year plan that describes with specificity proposed improvements or upgrades to the applicant's network throughout its proposed service area.

Become an ETC (1/3)

- To offer Lifeline-supported services, service providers must be designated as an ETC by their state commission **or** by the FCC.
 - This designation is required for every state where the provider plans to offer Lifeline.
- Service providers should first contact their <u>state commission</u> to initiate the ETC designation process.
- In states where the state commission does not designate Lifeline ETCs, service providers must apply directly with the FCC for designation.

Become an ETC (2/3)

- To obtain ETC designation from the FCC, a company must file a petition that:
 - 1. Demonstrates ETC designation jurisdiction rests with the FCC (or, in the case of Tribal service providers, argues where jurisdiction properly belongs).
 - 2. Certifies the company will comply with all service requirements for Lifeline, including, but not limited to, that the company:
 - a) Acts as a common carrier offering voice telephony services meeting Lifeline requirements.
 - b) Makes the supported service available to qualifying low-income consumers.
 - c) Offers the supported service through its own facilities or a combination of its own facilities and resale of another carrier's services (or else provides a compliance plan warranting forbearance from this requirement).
 - d) Advertises the availability of services and related charges using generally distributed media.
 - e) Agrees to comply with the FCC's document retention and reporting requirements.
 - 3. Provides a detailed description of the service area for which the company requests designation.
 - 4. Demonstrates the company's ability to remain functional in emergency situations.

Become an ETC (3/3)

- In addition, the company's petition for ETC designation must also:
 - 1. Demonstrate the company will satisfy applicable consumer protection and service quality standards.
 - 2. Certify that neither the company, nor any party to the application, is subject to a denial of federal benefits pursuant to the Act of 1988.
- If the company is seeking Lifeline-only designation, the petition must also:
 - 3. Demonstrate the company is financially and technically capable of providing the Lifeline service in compliance with FCC rules.
 - 4. Submit information describing the terms and conditions of any voice telephony plans offered to Lifeline subscribers.
- Prior to designating a company as an ETC, the FCC must determine whether such designation is in the public interest.

Register for a 498 ID (1/2)

- A 498 ID, also known as Service Provider Identification Number (SPIN), is required to participate in Lifeline (and any of USAC's other programs).
 - This number is unique and assigned to each service provider by USAC.
- The FCC Form 498 collects service provider contact, billing/payment, and collection information.
 - Service providers can register for a 498 ID/SPIN by visiting <u>E-File</u> in One Portal and completing the FCC Form 498.
- For more information on how service providers can obtain and manage a 498 ID/SPIN, service providers can refer to our <u>Register for a 498 ID</u> page.

Register for a 498 ID (2/2)

- To begin registration, service providers must register in <a>One Portal and create an account.
- To create an account, select "Service Provider 498 ID" and then "Register Your Company."
- Once an account is created, service providers register their company.
- The FCC Form 498 will be saved in E-File and USAC will be notified to review the submission.
- Once the registration is complete and approved, USAC will issue the 498 ID/SPIN.

Obtain a Study Area Code (SAC)

- A Study Area Code (SAC) is a unique number that USAC assigns to ETCs that identifies the
 provider based on the service area where they are designated to offer the Lifeline services.
- ETCs are issued at least one SAC per state where they are designated to operate.
- USAC uses the following information to complete a SAC request:
 - 1. The approved compliance plan (if applicable).
 - 2. The ETC's designation order.
 - 3. Terms and conditions of Lifeline program service, including service plans.
 - 4. 498 ID/SPIN and company contact information.
 - 5. Any other supporting documentation asserting that the provider is approved to participate in Lifeline.

ETC Responsibilities

All Lifeline ETCs are responsible for complying with the Lifeline program rules, including but not limited to:

- Registering for Representative IDs in RAD to perform applicable transactions.
- Ensuring Lifeline-eligible consumers have qualified through the National Verifier.
- Enrolling Lifeline-qualified consumers in the National Lifeline Accountability Database (NLAD).
- Preventing duplicate enrollments by ensuring that enrolled subscribers are not already enrolled by another service provider and keeping NLAD up to date.
- Providing Lifeline subscribers with Lifeline-supported services that meet Lifeline's minimum service standards.
- Submitting claims to receive reimbursement in the Lifeline Claims System.
- Advertising Lifeline to their consumers.

Companies Near Me Tool

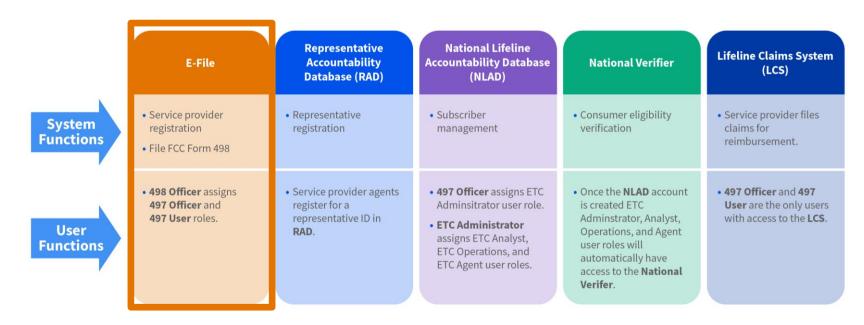
- The <u>Companies Near Me tool</u> is used to help consumers locate service providers who offer the Lifeline benefit in their area.
- Service providers must request to be added to this online directory.
- To have your company added to Companies Near Me, please email <u>LifelineProgram@usac.org</u>.

Questions?



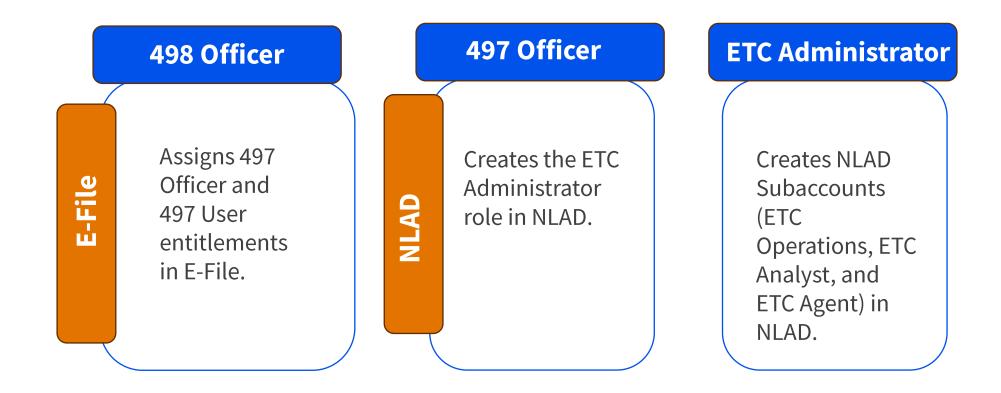
Accessing E-File

- USAC will send you a welcome email notifying you that your 498 ID has been linked to your SAC.
- The email will direct you to use the SAC (associated with the service area and the state where a consumer lives) when enrolling consumers into the Lifeline program.
- The email will also outline your next steps, including how to gain access to E-File, which is your starting point to get access to USAC's systems.



Accessing E-File

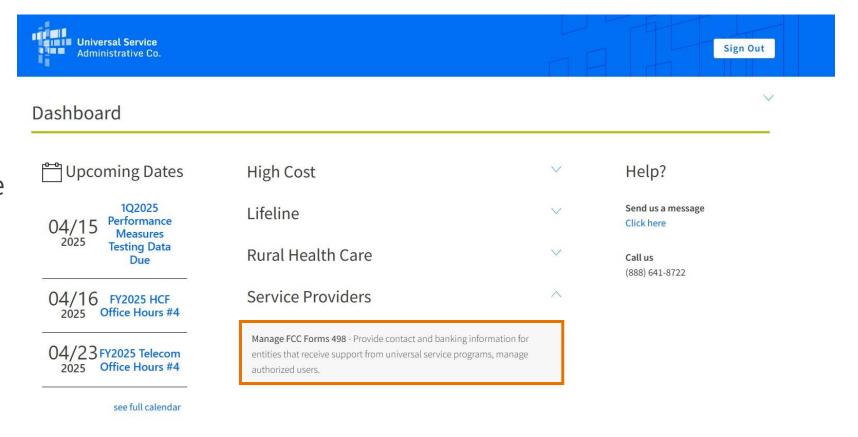
• Getting access to Lifeline systems starts with E-File. To get started, you'll need to set up appropriate user entitlements. Below is a summary of the available administrative user roles and their responsibilities.



E-File

Access E-File & New Users

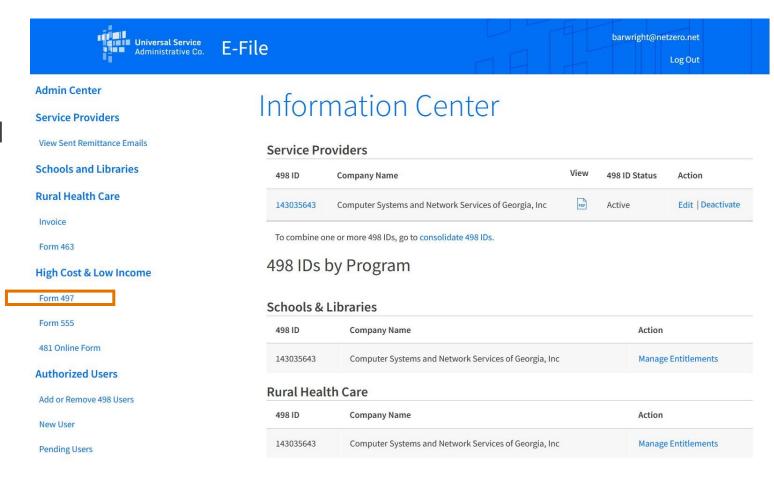
- 497 Officers may log in to USAC's <u>One Portal</u> to Access E-File.
- Then, select Manage FCC
 Forms 498 under the Service
 Provider section of the dashboard.



E-File

E-File Landing Page

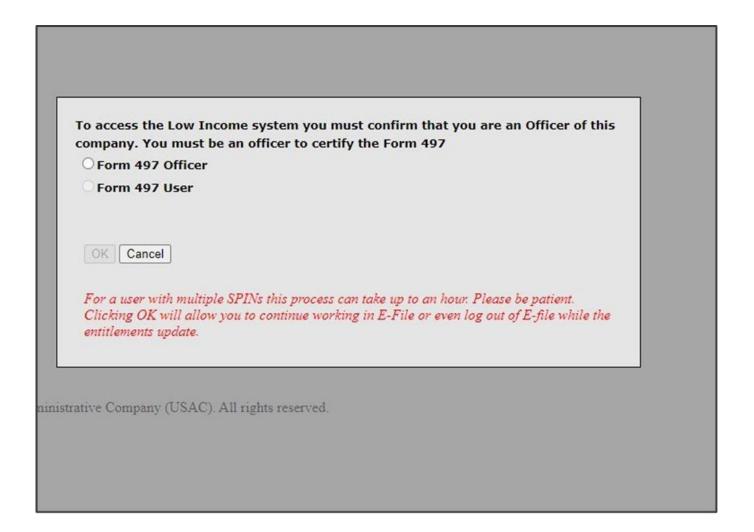
The 498 Officer can select
 Form 497 from the lefthand menu to access the form.



E-File

Certify 497 Entitlement

- Then they can select Form
 497 Officer or User and select OK to confirm.
 - For 498 Officers with multiple SPINs, it can take up to an hour for the entitlements to update in E-File.



Service Provider User Accounts

498 Officer

Authorized to certify the FCC Form 498.

Also assigns and manages the 497 Officer and 497 User roles in E-File.

497 Officer

Authorized to certify reimbursement claims.

Manages the ETC Administrator user role in NLAD.

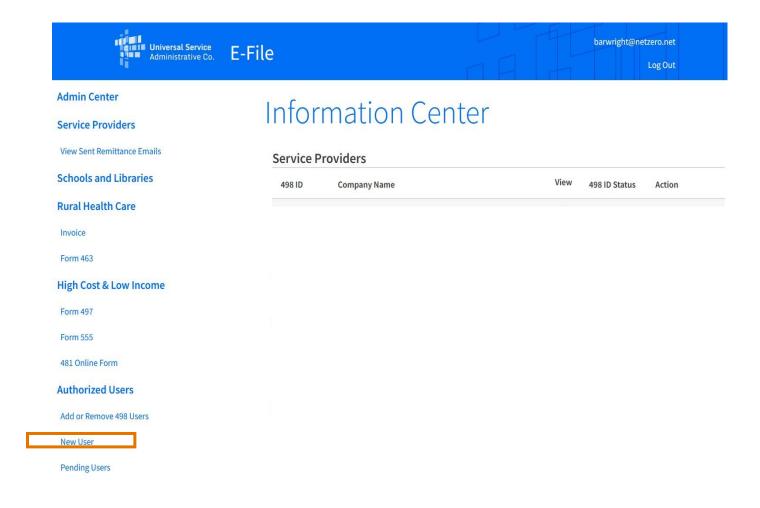
497 User

Can upload, modify, and submit claims, but cannot certify claims.

Creating New Users

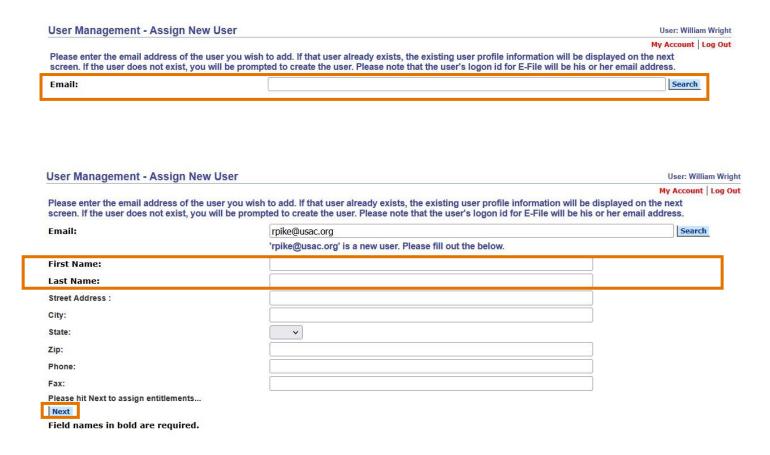
Create New User

 To create a new 497 Officer, select **New User** under the Authorized Users section of the left-hand navigation menu.



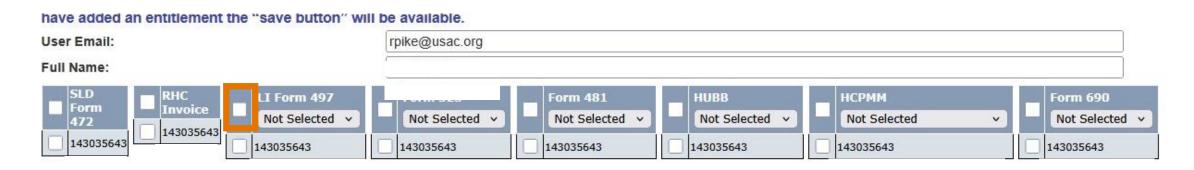
Create 497 Officer

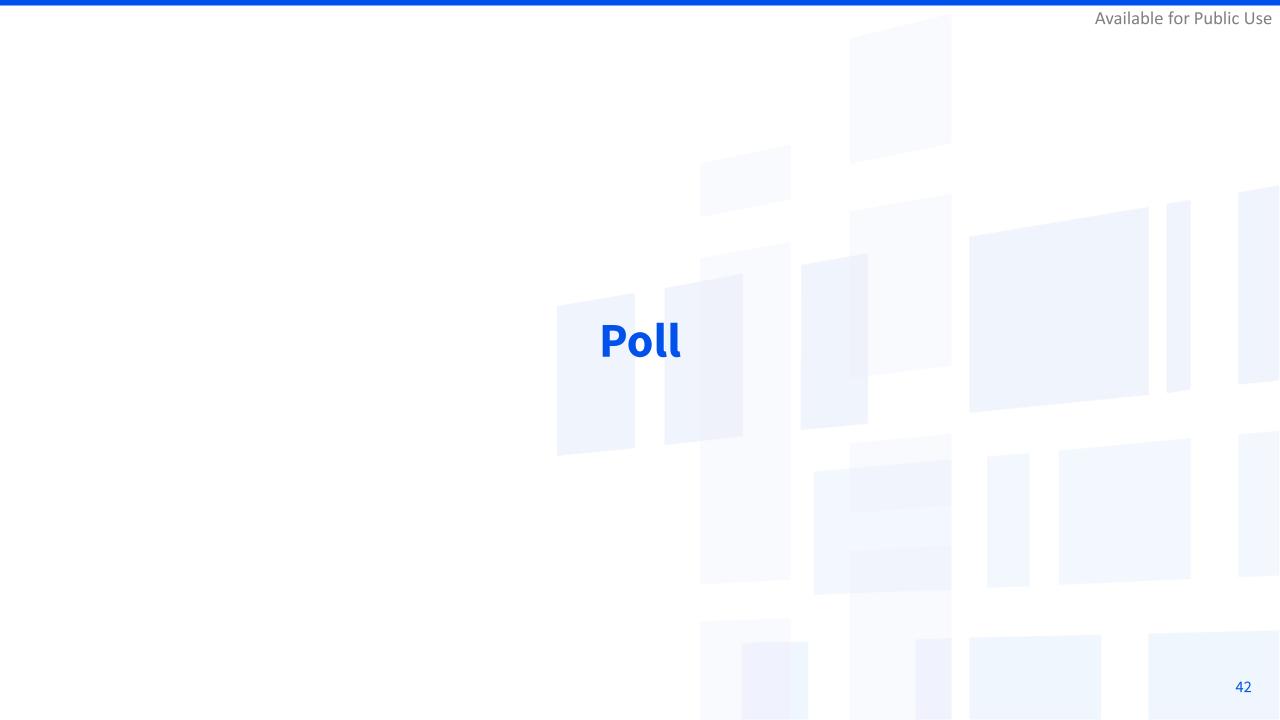
- Enter in the Email Address of the user to receive the 497 Officer Entitlements, and click Search.
- Enter in the user's first and last name (these are the only required fields).
- Select Next
 - Note: It may take a few seconds before the next page loads.



Create 497 Officer

- Click the LI Form 497 checkbox.
- Select 497 Officer from the dropdown menu.
- Click the checkbox for the SPIN(s) the user should have 497 Officer entitlements.
- Select Save.
- You will receive a confirmation message that the user was successfully added.



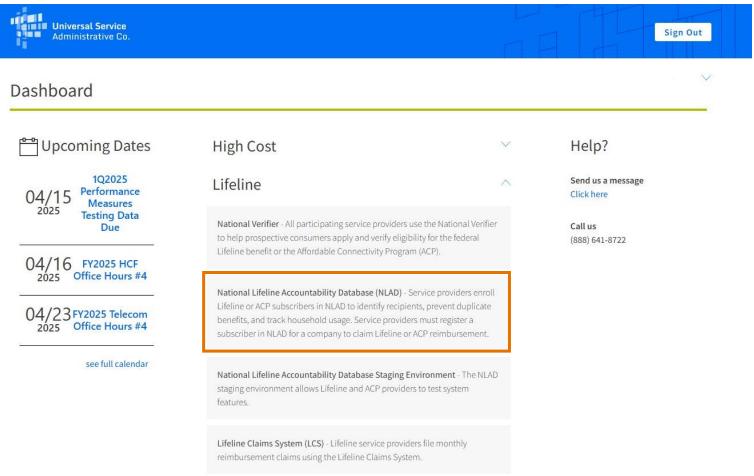


ETC Administrator

Create New Users

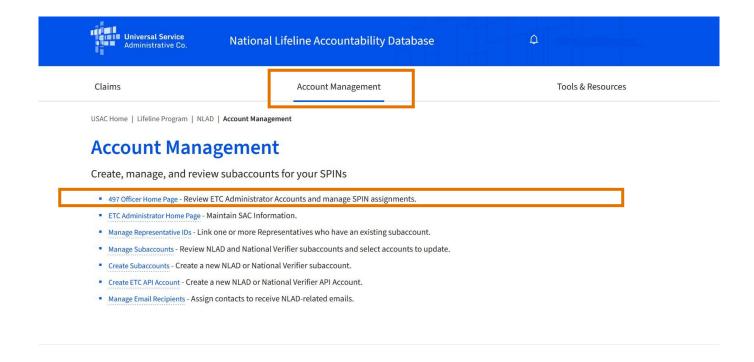
Create ETC Administrator (1/4)

- To create the ETC Administrator use role, login to <u>One Portal</u>.
- Select National Lifeline
 Accountability Database
 (NLAD) from under the Lifeline section of the dashboard.



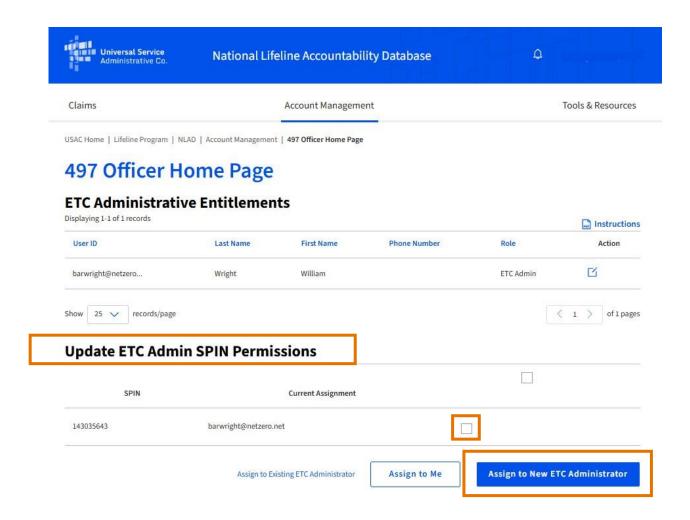
Create ETC Administrator (2/4)

- Select Account Management from the header menu.
 - The page will automatically be updated to reflect a new menu under Account Management.
- Select 497 Officer Home Page to continue with creating the ETC Administrator role.



Create ETC Administrator (3/4)

- From the Update ETC Admin SPIN
 Permissions section, select the SPIN(s) you would like to assign to the new ETC
 Administrator by clicking the corresponding box.
- Select Assign to New ETC Administrator.



Create ETC Administrator (4/4)

- Enter the Email Address of the new ETC Administrator and confirm their details.
- Select Submit.
- Then provide the information requested in each empty field and select Create.
- You will receive a confirmation message that the user was successfully added as an ETC Administrator.

Create ETC Administrator Account Instructions **Authorized ETC Administrator Information Email Address Confirm Email Address Create ETC Administrator Account** Instructions **Authorized ETC Administrator Information** Email: etc.testadmin@uat.com **First Name Last Name**

Representative ID (optional)

State

Apt, Unit, etc

ZIP Code

Phone Number

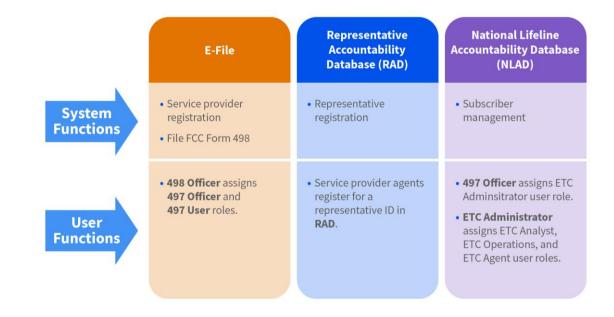
ETC Information

Company Primary Address

Next Steps

Begin Enrolling Subscribers

- Once you have obtained access to E-File, below is a high-level overview of your next steps:
 - Register for a Representative ID.
 - Create a National Lifeline Accountability Database (NLAD) account.
 - Start enrolling subscribers.



Resources

Several resources below are available to support you in becoming a Lifeline service provider:

- View the <u>Service Provider Toolkit</u>.
- View the NLAD User Guide.
- Visit <u>usac.org/lifeline</u> for general program information.
- Visit Lifeline's <u>Webinars</u> page to review past trainings and register for upcoming events.
- Email <u>LifelineProgram@usac.org</u> for technical support and additional information on processes, rules, and requirements.

Questions?

June Webinar

Register for the next Lifeline webinar.

• **Date**: June 11, 2025

• **Time**: 3:00 p.m. ET – 4:00 p.m. ET

Topic: Representative Accountability

Database (RAD) 101

Webinars

Join us to learn about Lifeline program updates, including Lifeline program rules and orders, guidance about compliance and filings, the National Verifier (NV), and the National Lifeline Accountability Database (NLAD).

Sign up [] for the Lifeline program newsletter to receive webinar announcements via email.

Upcoming Trainings

June 2025 Monthly Webinar: Representative Accountability Database (RAD) 101

Date: Wednesday, June 11, 2025 **Time:** 03:00 pm ET – 04:00 pm ET

Register

Thank You!



