Lifeline Multifactor Authentication and
FCC Form 555

December 11, 2019
Housekeeping

- Audio is available through your computer’s speakers
- The audience will remain on mute
- Enter questions at any time using the “Questions” box
  - There is a large audience signed in today. We will accept as many questions as possible!
- If your audio or slides freeze, restart the webinar
- Copy of the slide deck in the “handouts” section of webinar panel
Today's Presenters

Catie Miller  Leah Sorini  Linnita Hosten  Debby Smith  Christian Konan
1. Announcements
   - Minimum Service Standards
   - New Order
   - RAD
   - Multifactor Authentication

2. FCC Form 555
   - Overview
   - Walkthrough of Online Form
   - Helpful Tips and Resources

3. Questions
Announcements

December Monthly Webinar
## Announcements
### Minimum Service Standards

The Types of Lifeline Services Carriers Can Offer

<table>
<thead>
<tr>
<th>Lifeline Service Type</th>
<th>Description</th>
<th>Lifeline Support Amount Starting on December 1, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>Subscriber is provided a Voice only service that meets the minimum service standards.</td>
<td>$7.25</td>
</tr>
<tr>
<td>Broadband</td>
<td>Subscriber is provided a Broadband only service that meets the minimum service standards.</td>
<td>$9.25</td>
</tr>
<tr>
<td>Bundled Voice</td>
<td>Subscriber is provided a Voice and Broadband service that meets the Voice minimum service standards only.</td>
<td>$7.25</td>
</tr>
<tr>
<td>Bundled Broadband</td>
<td>Subscriber is provided a Voice and Broadband service that meets the Broadband minimum service standards only</td>
<td>$9.25</td>
</tr>
<tr>
<td>Bundled Voice &amp; Broadband</td>
<td>Subscriber is provided a Voice and Broadband service that meets both the Voice and Broadband minimum service standards.</td>
<td>$9.25</td>
</tr>
</tbody>
</table>
# Announcements

## Minimum Service Standards

### Changes to the Minimum Service Standards

<table>
<thead>
<tr>
<th>Date</th>
<th>Mobile Voice</th>
<th>Mobile Broadband</th>
<th>Fixed Broadband</th>
<th>Voice Support (Per Month)</th>
<th>Broadband Support (Per Month)</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 1, 2019</td>
<td>1000 Minutes</td>
<td><strong>Speed</strong>: 3G</td>
<td><strong>Speed</strong>: 20/3 Mbps</td>
<td>$7.25</td>
<td>$9.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Data Usage</strong>: 3 GB/Month</td>
<td><strong>Data Usage</strong>: 1024 GB/Month</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Announcements
Minimum Service Standards

What does this mean?

• Provide the new standard of service to Lifeline subscribers beginning the month of December
• Update NLAD within 10 days of making a change to the consumer’s service type
• The January 1, 2020 Subscriber Snapshot in LCS will capture any change to service type
• More information on minimum service standards can be found on our site.
Announcements
Fifth Report and Order

• The *Lifeline Fifth Report and Order* was released on November 14, 2019

• Administrative in nature, the order focused on strengthening program enrollment, recertification and reimbursement processes

• Additionally the Order increases data transparency, resolves several open petitions, and seeks comment on additional measures to combat waste, fraud and abuse.
Announcements
Fifth Report and Order

- The recent FCC order makes several changes or codifies practices to strengthen program integrity

- Changes include:
  - Prohibits providers from paying commission on Lifeline enrollments
  - Requires eligibility documentation to be collected in certain instances during annual recertification
  - Codifies the creation of the Representative Accountability Database (RAD)

Read the order [here](#)
Announcements
Representative Accountability Database (RAD)

- RAD is now available in the production environment for optional use
- Service providers have the option to link new or existing NLAD and National Verifier accounts
- Representatives may continue registering for a Representative ID

Register and view resources here
Announcements
Representative Accountability Database (RAD)

- RAD will be mandatory when the FCC’s enrollment representative rule becomes effective.
- The rule will become effective 90 days after the Lifeline Fifth Report and Order is published in the Federal Register.
- View RAD videos here.

Watch for upcoming RAD training here.
Announcements
Multifactor Authentication

- **System User Updates**: Multifactor authentication & single portal dashboard
  - Increased security of Lifeline IT applications.
  - Access to Universal Service Fund (USF) IT applications (NLAD, E-File and My Portal) through the same sign-on process.
  - Ability to perform password resets (no longer requiring a Lifeline Administrator).
**Announcements**

**Multifactor Authentication**

- Users can now reset their own passwords
- Password resets must take place in the single portal dashboard.
  - To reset a password automatically users must go to [https://forms.universalservice.org/portal/login](https://forms.universalservice.org/portal/login).
  - If you are locked out due to invalid login attempts, you are still able to reset your password.
Announcements
Multifactor Authentication

- Watch a video on USAC’s new OnePortal [here].
Overview

FCC Form 555
FCC Form 555

- Each year, service providers must submit **FCC Form 555**, the “Annual Lifeline Eligible Telecommunications Carrier Certification Form”
  - Reports recertification and non-usage
  - Make additional certifications
  - Due to USAC, state commissioners, and the FCC by **January 31**
- Required for all Lifeline Program service providers
  - Includes providers that have a SAC assignment from USAC that have not been relinquished (even if the company has had subscribers and didn’t file reimbursement claims in LCS during the year)
  - Includes providers using USAC-Elected Recertification
  - One form submission per SAC
- This year’s form will open on **Sunday, December 15**
FCC Form 555
National Verifier

• National Verifier service providers are still responsible for completing FCC Form 555.
• Only include subscriber information for recertifications that you conducted.
• You must include information for every subscriber that you recertified, even if you conducted recertification for subscribers you were not required to.
FCC Form 555
National Verifier: 2018 Soft Launches

• If your state was in the June 2018 launch or October 2018 launch and you stopped conducting recertifications upon soft launch, put “0” in blocks A – C for these subscribers.

• If your state was in the December 2018 launch, please note that:
  • You were not responsible for recertifying subscribers beginning the day of soft launch
  • You should not have started new recertification batches at that time
  • You were responsible for conducting recertifications up until the day of soft launch
  • You were required to complete any recertifications that were currently underway

• The December 2018 launch states soft launched on December 4.
FCC Form 555
National Verifier: 2019 Soft Launches

- If your state was in a 2019 launch, please note that:
  - You were **not** responsible for recertifying subscribers beginning the day of soft launch
  - You should **not** have started new recertification batches at that time
  - You **were** responsible for conducting recertifications up until the day of soft launch
  - You **were** required to complete any recertifications that were currently underway
FCC Form 555
National Verifier: 2019 Soft Launches

- 2019 soft launch schedule:
  - February 2019 launch: February 6, 2019
  - March 2019 launch: March 12, 2019
  - June 2019 launch: June 25, 2019
  - October 2019 launch: October 11, 2019
  - December 2019 launch: December 16, 2019
FCC Form 555
Implications for Recordkeeping

• Maintain documentation to support what is reported on FCC Form 555
  • Subscribers eligible for recertification per month
  • De-enrollments for non-usage per month
  • Successful and failed recertifications by type per month

• Examples
  • Snapshot of anniversary dates per month (suggestion: download and save the Detail Active Subscriber Report from NLAD)
  • Results of database queries and other recertification efforts
FCC Form 555
Implications for Recordkeeping

- Reminder: Lifeline Rules 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
Walkthrough of Online Form

FCC Form 555
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? E-File User Guide or call (888) 641-8722
Walkthrough of Online Form
Logging in

• Log into E-File (OnePortal) with your user name and password
• Accept USAC’s system policy
Walkthrough of Online Form
Select the Form

- After you are logged in, you will see the E-File (OnePortal) Home screen
- On the left-hand navigation menu, 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
Walkthrough of Online Form
Accept T&C

- Accept USAC’s terms and conditions
Walkthrough of Online Form
Choose Filing Method

- **Left**: Single form entry
  - To search for your SAC, select a state and year, then click “Search”
  - Demo of single-form entry
- **Right**: Bulk Upload
  - Bulk upload and bulk certify are also available
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 “Start New Form”
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
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 auto-populate based on last year’s filing
Walkthrough of Online Form Non-Usage

- Asks 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
Walkthrough of Online Form
Subs. 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
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: TX, CA, OR
  - 3rd party recertification in a later section
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
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)
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
Walkthrough of Online Form Summary Page

- Review your entries
- Press “Continue to Certification” button
  - E-File permissions: 497 Officer can certify FCC Form 555
Walkthrough of Online Form Certification

- An officer of the company must initial and certify the form to complete the submission
Questions?
Helpful Tips and Resources

FCC Form 555
Helpful Tips and Resources

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

- The form instructions are very helpful
- Read the tool tips inside the online form
- For help, contact Form555@usac.org
Helpful Tips and 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
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• Need help? Contact us!
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  • FCC Form 555: Form555@usac.org

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