December 2021 Monthly Webinar

FCC Form 555
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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 webinar panel
Today’s Presenters

Delante Cherry

Debby Smith

Christian Konan
Agenda

• Announcements
  • COVID-19 Waivers
  • Hurricane Ida Waivers
  • System Enhancements

• FCC Form 555
  • Overview
  • Walkthrough of Online Form

• Helpful Tips and Resources
Announcements

Waivers
Announcements

• On **September 22, 2021**, the Wireline Competition Bureau (Bureau) extended the waivers governing recertification, reverification, general de-enrollment, and income documentation through December 31, 2021.

• On **September 22, 2021**, the Bureau also extended the waiver regarding documentation requirements for subscribers residing in rural areas on Tribal lands through December 31, 2021.

• **Reminder:** The waiver governing FCC’s Lifeline non-usage rule ended May 1, 2021.

• USAC will continue to temporarily accept driver’s licenses or state identification cards that have expired on or after March 1, 2020, when needed to complete any Lifeline applications.
Announcements
Hurricane Ida Waivers

• On September 3, 2021, the Bureau issued Order DA 21-1107 waiving certain Lifeline rules and deadlines to assist participants located in the areas affected by Hurricane Ida.

• On November 30, 2021, the waiver governing the FCC’s Lifeline non-usage rule for subscribers residing in the Affected Disaster Areas ended.
  • Lifeline subscribers subject to the non-usage rule and residing within the impacted areas will have 30 days to use their Lifeline service.
  • If the subscriber does not use their Lifeline service during the 30-day window (from December 1st through December 30th), the 15-day notice period will begin on December 31, 2021.
# Announcements
Minimum Service Standards Effective December 1, 2021

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Mobile Voice</th>
<th>Mobile Broadband</th>
<th>Fixed Broadband</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/1/2020 (Current)</td>
<td>1000 Minutes</td>
<td><strong>Speed</strong>: 3G or better; <strong>Usage Allowance</strong>: 4.5 GB</td>
<td><strong>Speed</strong>: 25/3 Mbps; <strong>Usage Allowance</strong>: 1024 GB</td>
</tr>
<tr>
<td>12/1/2021</td>
<td>1000 Minutes</td>
<td><strong>Speed</strong>: 3G or better; <strong>Usage Allowance</strong>: 4.5 GB</td>
<td><strong>Speed</strong>: 25/3 Mbps; <strong>Usage Allowance</strong>: 1229 GB</td>
</tr>
</tbody>
</table>
Announcements
Voice-Only Phase-Out Paused

• On November 5, 2021, the Wireline Competition Bureau (Bureau) paused the phase-out in Lifeline support for voice-only services for one year. The reimbursement amount for Lifeline voice-only services will continue to be $5.25 on and after December 1, 2021
FCC Form 555
Overview, Tips, & Implications for Recordkeeping
FCC Form 555
Overview

- Each year, service providers must submit the **FCC Form 555**, the “Annual Lifeline Eligible Telecommunications Carrier Certification Form”
  - Report recertification and non-usage
  - This year, the form is due to USAC, state commissioners, Tribal governments, and the FCC by **January 31**.
- The FCC Form 555 must be submitted to USAC electronically via USAC’s [E-File (One Portal)](#)
- Carriers must also file a copy of their FCC Form 555 in the FCC's Electronic Comment Filing System, Docket 14-171, with their state regulatory commission, and with relevant Tribal governments
FCC Form 555
Overview

• Required for all Lifeline program service providers
  • Includes providers that have a SAC assignment from USAC that has not been relinquished (even if the company did not file reimbursement claims in LCS during the year)
  • Includes all providers (including where the National Verifier has fully launched)
  • One form submission per SAC is required
FCC Form 555
Tips for Completing the FCC Form 555

• You must include information for every subscriber you de-enrolled for non-usage
  • **Reminder:** The COVID-19 waiver governing the FCC’s Lifeline non-usage rule ended May 1, 2021
  • Additionally, on September 3, 2021, the FCC issued an [Order](#) temporarily waiving the Lifeline non-usage rules, through November 30, 2021, for subscribers residing in the affected disaster areas impacted by Hurricane Ida, which include all parishes and counties in Louisiana and Mississippi
FCC Form 555
Tips for Completing the FCC Form 555

- Service providers are still responsible for completing FCC Form 555 in states and territories where the National Verifier has launched
  - **Reminder:** The COVID-19 waiver governing the FCC’s Lifeline recertification rule is in effect through December 31, 2021
  - If you were not responsible for conducting any recertifications (due to being part of the National Verifier), you should put “0” in blocks A – C for these subscribers
    - You must also complete blocks I – L for any recertification conducted by the state administrator in California, Oregon, and Texas
  - If you were not required to conduct recertification but you still did, you must report the results for those subscribers
## FCC Form 555
National Verifier Launches

<table>
<thead>
<tr>
<th>Launch</th>
<th>Soft Launch</th>
<th>Hard Launch</th>
<th>States and Territories</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 2018 launch</td>
<td>6/18/2018</td>
<td>11/4/2018</td>
<td>CO, MS, MT, NM, UT, WY</td>
</tr>
<tr>
<td>October 2018 launch</td>
<td>10/15/2018</td>
<td>1/15/2019</td>
<td>GU, HI, ID, ND, NH, SD</td>
</tr>
<tr>
<td>February 2019 launch</td>
<td>2/5/2019</td>
<td>5/7/2019</td>
<td>AK, AS, DC, DE, ME, MP, RI, VI</td>
</tr>
<tr>
<td>March 2019 launch</td>
<td>3/12/2019</td>
<td>6/11/2019</td>
<td>IN, KY, MI</td>
</tr>
<tr>
<td>December 16, 2019 launch</td>
<td>12/16/2019</td>
<td>3/24/2020</td>
<td>FL, IL, MN, OH, WI</td>
</tr>
<tr>
<td>December 20, 2019 launch</td>
<td>12/20/2019</td>
<td>11/18/2020 *12/18/2020 (CA)</td>
<td>CA*, OR, TX</td>
</tr>
</tbody>
</table>

*NLAD opt-out states*
FCC Form 555
Implications for Recordkeeping

• Maintain documentation to support what is reported on the FCC Form 555
  • Subscribers eligible for recertification per month
  • De-enrollments for non-usage per month
  • Successful and failed recertifications by recertification method
• Recordkeeping Examples
  • Snapshot of anniversary dates per month
  • Results of database queries and other recertification efforts
FCC Form 555
Implications for Recordkeeping

• Reminder: Lifeline Rule 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
Online Filing Tips
Walkthrough of Online Form
Online Filing Tips

• Use a recommended browser
  • Chrome
  • Firefox
  • Internet Explorer 10
• E-File credentials
  • Username = 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 (One Portal) with your username 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 (One Portal)** Home screen
- Under the Lifeline section, 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

Choose Filing Method

- Single form entry
  - Select a state and SAC, then click “Search”
- Demo of single-form entry
- 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 “New Entry”
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

- Indicate whether the ETC is subject to the non-usage requirements
  - ETCs that do not assess or collect a monthly fee are subject to the non-usage requirements
- 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
Subscribers 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: CA, OR, TX
  - 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 (including administrators in California, Texas and Oregon), **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” button
  - E-File permissions: 497 Officer can certify FCC Form 555
Walkthrough of Online Form Certification

- A 497 officer of the company must initial and certify the form to complete the submission
Helpful Tips and Resources
Helpful Tips and Resources

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

• Use the supplemental information for details about how to complete the form
• 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
Questions?
Learn More About Lifeline

• Sign up for Lifeline email updates and upcoming events
• Need help? Contact us!
  • General inquiries: LifelineProgram@usac.org
  • FCC Form 555: Form555@usac.org
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!