

Lifeline Program Update

July 8, 2020



Universal Service
Administrative Co.

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



Catie Miller



Linnita Hosten



Leah Sorini

Agenda

1. Announcements
2. Lifeline Household Worksheet
3. System Enhancement
4. Reminders: Resolving Address Errors
5. Upcoming NLAD Enhancement
6. Resolving Tribal Address Errors
7. Resources

Announcements

Temporary Lifeline Program Changes Due to COVID-19

In response to the pandemic, the FCC released a series of waivers suspending the following rules and processes through **August 31**:

- Recertification
- Reverification
- General de-enrollment requirements (except de-enrollment at the user's request)
- Usage requirements
- USAC program integrity reviews
- Requirement to submit 3 consecutive months of income documentation

Announcements

Tribal Waiver

The FCC also issued an [Order](#) to make it easier for those who reside in rural areas on **Tribal lands** to enroll in the Lifeline Program during the COVID-19 Pandemic. These temporary changes, which are in effect through August 31, 2020, include:

- Allowing Tribal consumers in rural areas to receive service without immediately satisfying the documentation requirements for any errors in their application.
- Allowing service providers to waive a confirmed qualification status before enrolling a consumer. (Consumers can enroll before they are successfully qualified for the benefit through the National Verifier.)

Announcements

Tribal Waiver Cont.

- Allowing consumers who enroll through this waiver process **45 days** to provide the required documentation after sign up.
- Allowing service providers to elect to begin providing Lifeline service to consumers even if the consumer has not yet submitted supporting documentation to confirm their eligibility. Service providers **cannot** claim reimbursement for these consumers until they have successfully qualified for the benefit through the National Verifier.

- USAC is pleased to announce two database connections:
 - The **Puerto Rico Department of the Family**, which oversees the Puerto Rico Nutrition Assistance Program (PAN).
 - The **Nevada Department of Health and Human Services**.
- USAC has established 15 other state connections and two nationwide federal connections.



Announcements

Upcoming National Verifier Database Connections

The USAC team is finalizing two additional National Verifier database connections with the following states:

- Washington
- Wisconsin



Announcements

Existing State Database Connections

National Verifier

State + Territory Connections

API

Batch

Colorado

Georgia

Indiana

Iowa

Michigan

Mississippi

Nevada

New
Mexico

Pennsylvania

Puerto
Rico

Utah

Virginia

Kentucky

Missouri

North
Carolina

South
Carolina

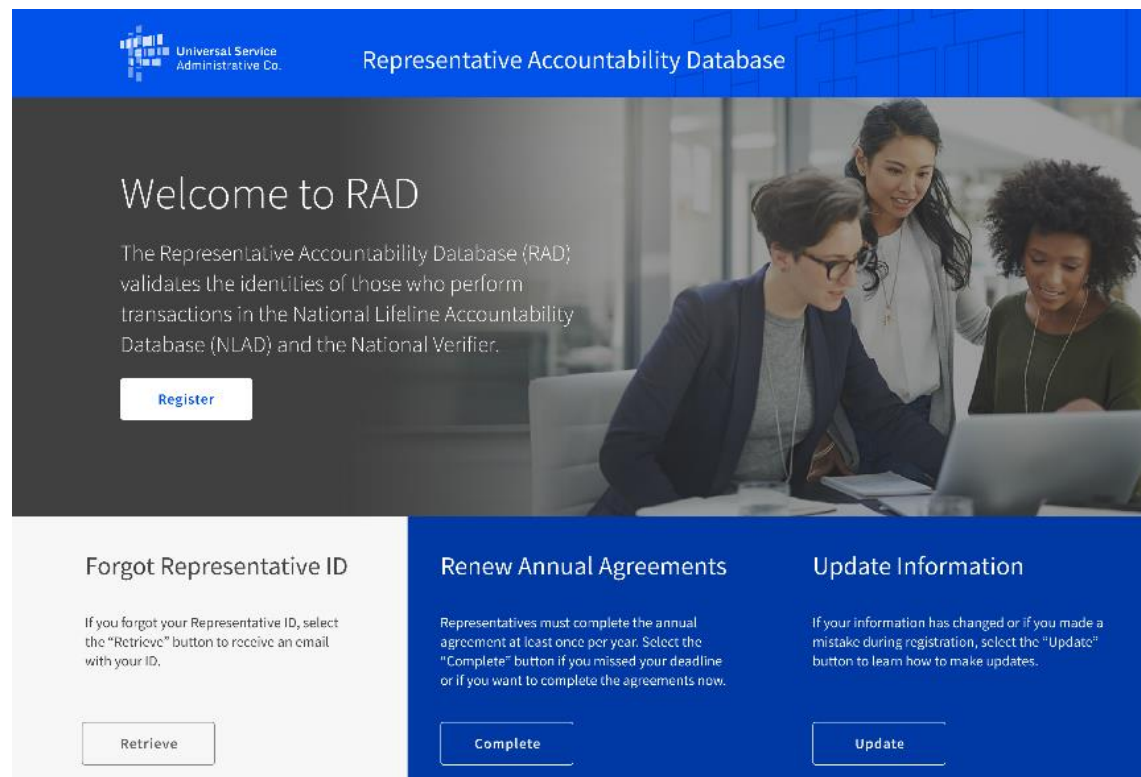
Tennessee

*API sends an automatic response. Batch connections collect and store data. At a scheduled time, the data is processed/released.

Announcements

Representative Accountability Database (RAD) New Feature

- To update an email address, physical address, and/or security questions, visit LifelineRAD.org and click *“Update Information.”*
- To update information such as name, date of birth (DOB), or last four digits of a social security number (SSN4), [email](#) the Lifeline Program with the subject line: *“Personal Information Change Request for RepID.”*



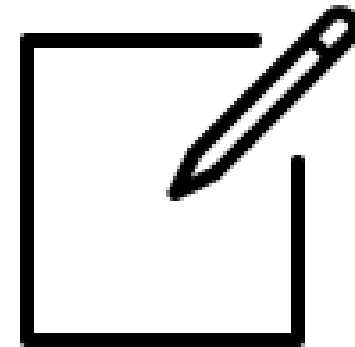
Lifeline Household Worksheet

An abstract graphic design featuring several overlapping rectangles in various shades of blue and one in orange. The rectangles are arranged in a dynamic, non-aligned fashion, creating a sense of movement and depth. The colors are solid and vibrant, contrasting against the white background.

Lifeline Household Worksheet

One-Per-Household Rule

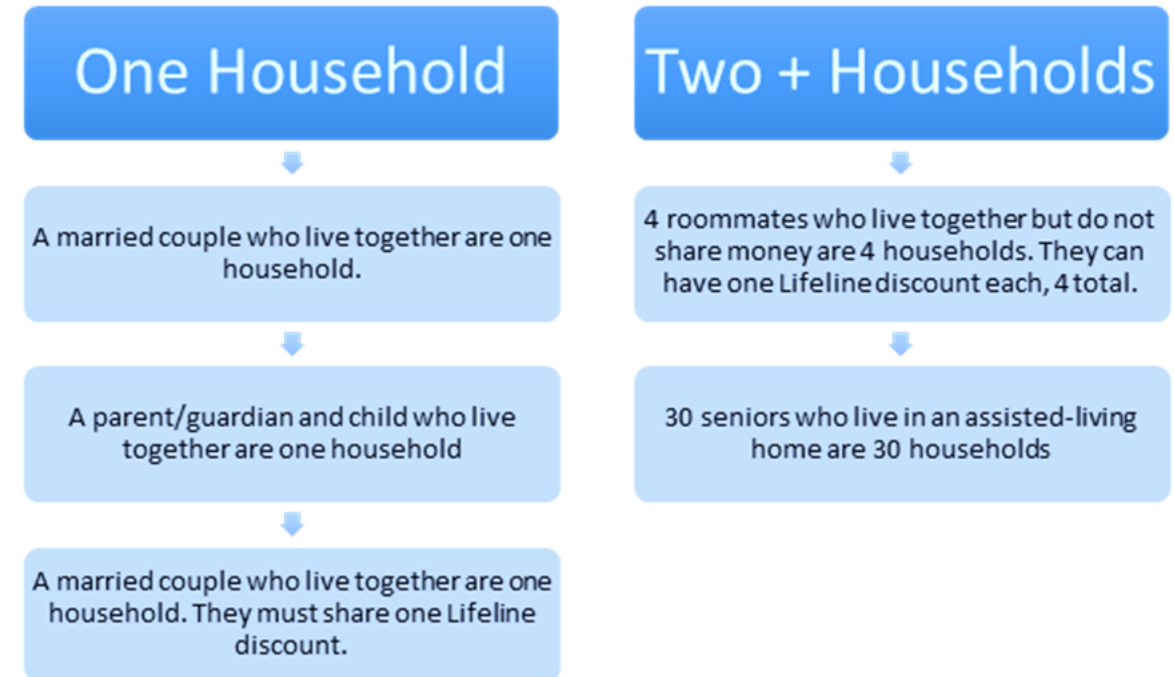
- Consumers are only allowed to receive one Lifeline discount per [household](#), not per person.
- If a consumer lives at an address where another consumer already receives the Lifeline discount, the consumer will need to complete a [Lifeline Household Worksheet](#)



Lifeline Household Worksheet

Household Definition

- A household is a group of people who live together and share income and expenses (even if they are not related to each other).
- If consumers live together and share money, they are one household.
- If consumers live together and do not share money, they are 2+ households.



Lifeline Household Worksheet

Proper Use

A [Lifeline Household Worksheet](#) must be completed if:

1. More than one subscriber at a single residential address receives Lifeline-supported service; or
2. When a new customer applies for service at an address where a customer is already receiving a Lifeline benefit.

FCC FORM 5631

Lifeline Program
Household Worksheet

OMB APPROVAL EDITION 3060-081

FCC

Universal Service
Administrative Co.

About Lifeline

Lifeline is a benefit that lowers the monthly cost of phone or internet service (not both). You are only allowed to get one Lifeline benefit per household, not per person.

What this worksheet is for

Use this worksheet if someone else at your address gets Lifeline. The answers to these questions will help you find out if there is more than one household at your address.

What is a household?

A household is a group of people who live together and share income and expenses (even if they are not related to each other).

Examples of one household:

- A married couple who live together are one household. They must share one Lifeline benefit.
- A parent/guardian and child who live together are one household. They must share one Lifeline benefit.
- An adult who lives with friends or family who financially support him/her are one household. They must share one Lifeline benefit.

Examples of more than one household:

- 4 roommates who live together but do not share money are 4 households. They can have one Lifeline benefit each, 4 total.
- 30 seniors who live in an assisted-living home are 30 households. They can have one Lifeline benefit each, 30 total.

Household expenses

A household shares expenses. Household expenses include, but are not limited to, food, healthcare expenses, and the cost of renting or paying a mortgage on your place of residence and utilities.

Income

Households share income. Income includes salary, public assistance benefits, social security payments, pensions, unemployment compensation, veteran's benefits, inheritances, alimony, child support payments, worker's compensation benefits, gifts, and lottery winnings.

Lifeline Household Worksheet

Resolving Duplicate Address Errors Via Paper Form

Consumers who apply to the Lifeline Program using a paper form can resolve a duplicate household error by:

- Completing and submitting the [Lifeline Household Worksheet](#)
- All mailed documents must be accompanied by a [Lifeline Program Cover Sheet](#). The consumer must include their last name and application ID.

FCC FORM 5631

Lifeline Program
Household Worksheet

OMB APPROVAL EDITION 3060-081

FC Universal Service
Administrative Co.

About Lifeline

Lifeline is a benefit that lowers the monthly cost of phone or internet service (not both). You are only allowed to get one Lifeline benefit per household, not per person.

What this worksheet is for

Use this worksheet if someone else at your address gets Lifeline. The answers to these questions will help you find out if there is more than one household at your address.

What is a household?

A household is a group of people who live together and share income and expenses (even if they are not related to each other).

Examples of one household:

- A married couple who live together are one household. They must share one Lifeline benefit.
- A parent/guardian and child who live together are one household. They must share one Lifeline benefit.
- An adult who lives with friends or family who financially support him/her are one household. They must share one Lifeline benefit.

Examples of more than one household:

- 4 roommates who live together but do not share money are 4 households. They can have one Lifeline benefit each, 4 total.
- 30 seniors who live in an assisted-living home are 30 households. They can have one Lifeline benefit each, 30 total.

Household expenses

A household shares expenses. Household expenses include, but are not limited to, food, healthcare expenses, and the cost of renting or paying a mortgage on your place of residence and utilities.

Income

Households share income. Income includes salary, public assistance benefits, social security payments, pensions, unemployment compensation, veteran's benefits, inheritances, alimony, child support payments, worker's compensation benefits, gifts, and lottery winnings.

Lifeline Household Worksheet

Resolving Duplicate Address Errors via the NV Portal

Consumers who apply to the Lifeline Program using the NV portal can resolve a duplicate household error in the NV portal.

Someone at Their Address Already Gets Lifeline

We need more information from the subscriber to find out if they qualify as another household.

A household is a group of people who live together and share income and expenses (even if they are not related to each other). You are only allowed one Lifeline benefit per household, **not per person**.

Do they share money (income and expenses) with another adult who gets Lifeline?

This can be the cost of bills, food, etc., and income.

☐ Yes ☒ No

They will have 45 days to complete this section so we can determine whether they qualify for lifeline. If they do not complete this by , they will need to come back to this site and fill this form out again.

[Back](#)[Next](#)

If the consumer chooses “**No**”, they will be able to apply for Lifeline. They will receive this message below and must initial the agreement.

They Can Apply for Lifeline

The subscriber lives at an address with more than one household and their household does not get Lifeline yet.

Have them initial the agreement below:

Initial ☐ I live at an address with more than one household. A household is a group of people who live together and share income and expenses (even if they are not related to each other).

Initial ☐ I understand I am only allowed to get one Lifeline benefit per household, **not per person**.

Initial ☐ I understand that this limit is an FCC rule, and **lying about my household on this government form can make me lose my Lifeline benefit** and is against the law.

Lifeline Household Worksheet

Resolving Duplicate Address Errors via the NV Portal

Available for Public Use

Someone at Their Address Already Gets Lifeline

We need more information from the subscriber to find out if they qualify as another household.

A household is a group of people who live together and share income and expenses (even if they are not related to each other). You are only allowed one Lifeline benefit per household, **not per person**.

Do they share money (income and expenses) with another adult who gets Lifeline?

This can be the cost of bills, food, etc., and income.

☒ Yes ☐ No

They will have 45 days to complete this section so we can determine whether they qualify for lifeline. If they do not complete this by , they will need to come back to this site and fill this form out again.

[Back](#)

[Next](#)

If the consumer selects “**Yes**”, they will not be able to apply for Lifeline. They will receive this message below.

They Cannot Apply for Lifeline

Someone in the subscriber's household already gets a Lifeline benefit. They are only allowed to get one Lifeline benefit per household, not per person.

If they want to transfer or cancel an existing Lifeline benefit in their household, the person who gets Lifeline needs to call their company.

For more information or to dispute this result (no later than) contact the Lifeline Support Center at 1-877-524-1325.

[Return to Your Account](#)

[Qualify Another Person](#)

System Enhancement



System Enhancement

Duplicate-Recheck Solution Background

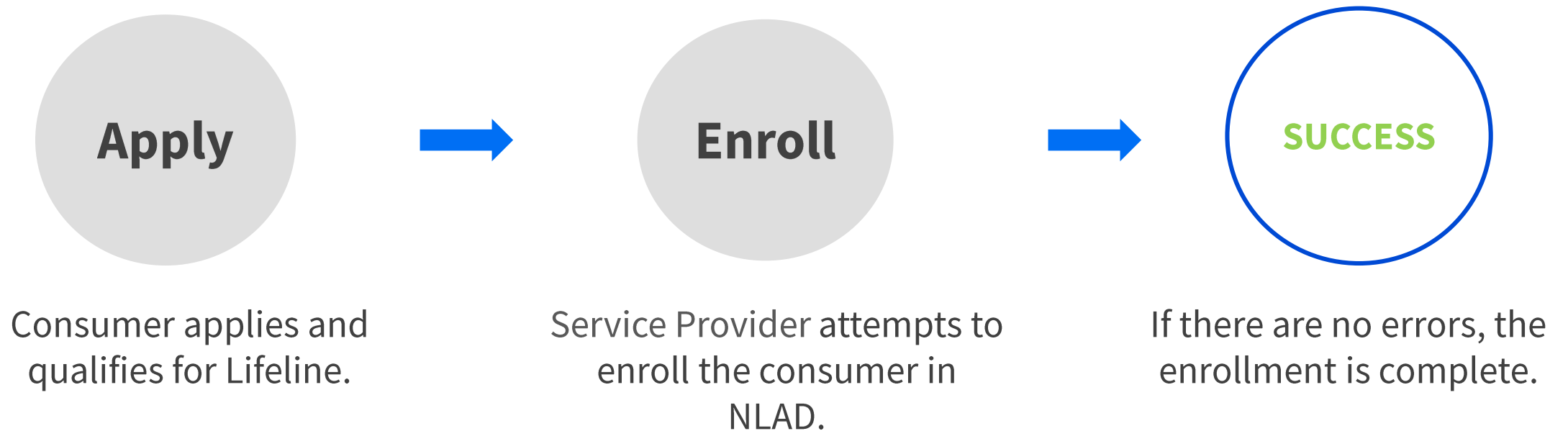
On June 30, USAC released a duplicate-recheck solution.

- This functionality allows for an easier resolution of cases when consumers who qualified in the National Verifier without an IEH error are found to have a duplicate address during an attempted enrollment in NLAD.
- This scenario occurs when another consumer applies and enrolls at the initial consumer's address before the first consumer is enrolled.

System Enhancement

Duplicate-Recheck Solution

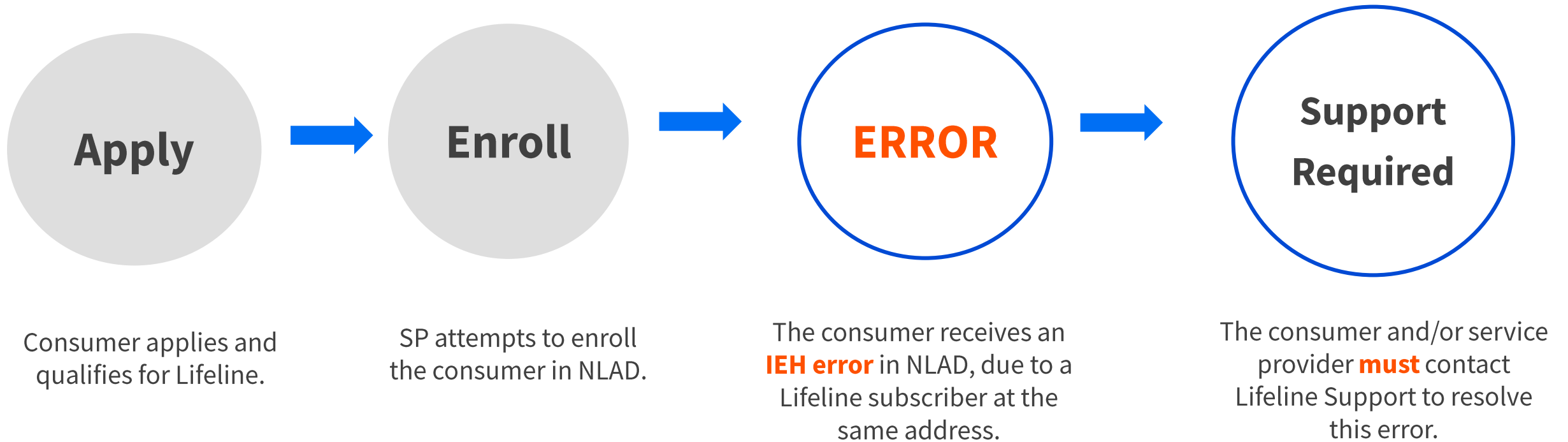
Happy Path



System Enhancement

Duplicate-Recheck Scenario

Old Error Path (Prior to June 30)

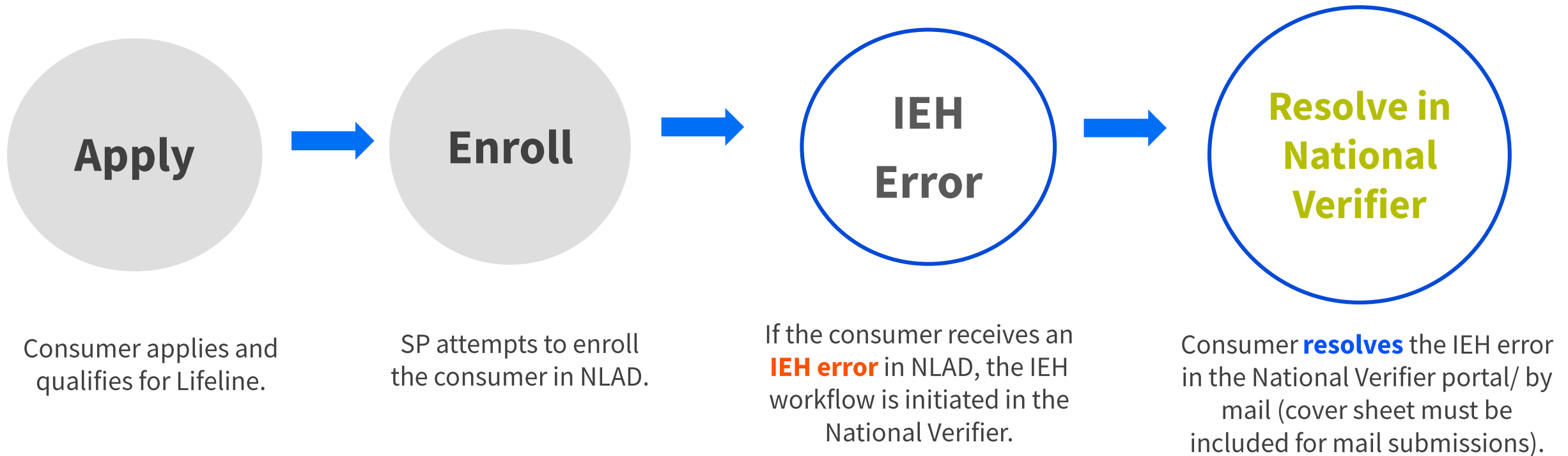


IEH Error: Independent economic household (IEH)/duplicate address error occurs when a consumer is identified as living at an address at which another Lifeline consumer lives.

System Enhancement

Duplicate-Recheck Scenario

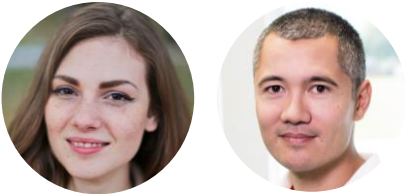
New NLAD IEH Error Resolution



IEH Error: Independent economic household (IEH)/duplicate address error occurs when a consumer is identified as living at an address at which another Lifeline consumer lives.

System Enhancement

Duplicate-Recheck Scenario- *Old Process*



Scenario: Taylor and Andrew are roommates.

Step 1

Taylor and Andrew each apply for the Lifeline Program via the NV portal and are qualified via the National Verifier.

Step 2

The following day, Andrew attempts to enroll into the Lifeline Program with the help of a service provider representative. Andrew receives a duplicate address error (because NLAD checks for duplicates at the time of enrollment).

Step 3

Andrew logs into his NV account. His account notes that his application is qualified but he is not able to resolve the duplicate address error (via an IEH form) because NLAD does not pass on the failure to the NV.

System Enhancement

Duplicate-Recheck Scenario- *Old Process Cont.*



Scenario: Taylor and Andrew are roommates.

Step 4

The service provider representative emails Lifeline Support and provides Andrew's Application ID. With the help of USAC admin, Andrew's NV account is updated to reflect a duplicate address failure.

Step 5

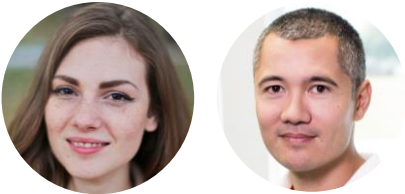
The service provider representative instructs Andrew to return to his NV portal and complete the IEH form.

Step 6

Andrew logs into his NV account, completes the IEH form and finishes the application. The service provider representative enrolls Andrew in NLAD.

System Enhancement

Duplicate-Recheck Scenario- *New Process*



Scenario: Taylor and Andrew are roommates.

Step 1

Taylor and Andrew each apply for the Lifeline Program via the NV portal and are qualified via the National Verifier.

Step 2

The following day, Andrew attempts to enroll in the Lifeline Program with the help of a service provider representative. Andrew receives a duplicate address error (because NLAD checks for duplicates at the time of enrollment.)

Step 3

NLAD communicates to the NV that Andrew's application needs to be updated to reflect more documents needed (IEH form).

Step 4

The service provider representative instructs Andrew to revisit his NV portal and complete the IEH form. Andrew completes the form and the service provider representative enrolls Andrew in NLAD.

Reminders: Resolving Address Errors



Reminders: Resolving Address Errors

Descriptive Address Option

- When completing the Lifeline Household Worksheet, if a consumer does not have a traditional home address, the consumer *can* provide a descriptive address (such as an intersection).

What is your home address?
The address where you will get service. Do not use a P.O. Box.

Street Number and Name	Apt, Unit, etc.	
<input type="text" value="12 RED HOUSE IN THE MIDDLE OF TOWN"/>	<input type="text"/>	
City	State	Zip Code
<input type="text" value="Yo Sample Town"/>	<input type="text" value="WA"/>	<input type="text" value="12345"/>


[Clear All](#) [Next >](#)

Reminders: Resolving Address Errors

Consumer Address Review

- Use the same consumer address for both the National Verifier (NV) and the National Lifeline Accountability Database (NLAD).
- Review the consumer's Lifeline letter to ensure the correct address is being used.
- If additional help is needed, contact Lifeline Support.

Qualification Letter Example



Universal Service
Administrative Co.

Lifeline Support Center
P.O. Box 7081
London, KY 40342

Lifeline Program
Application Notice

ED-1001
APPLICATION_ID
[LETTER_DATE]

FIRST_NAME LAST_NAME
ADDRESS
CITY STATE ZIP_CODE

You Qualify for Lifeline! It's Time to Sign Up.

Dear FIRST_NAME LAST_NAME,

Your Lifeline application is approved! If you haven't already done so, the next step is to sign up with a participating phone or internet company in the next 90 days from your application.

ⓘ If you do not sign up in the next 90 days, you will need to reapply for Lifeline.

How to Sign Up

1. Tell your phone/internet company your application is approved and ask to sign up for Lifeline. If you need help finding a company, visit LifelineSupport.org.
 - Use the same information that you used on your application form (name, address, date of birth, and the last 4 of your SSN). Enter your name and address **exactly** as it appears below:

FIRST_NAME LAST_NAME

ADDRESS

CITY STATE ZIP_CODE
2. After you sign up with a phone or internet company, you will start getting the Lifeline discount.

Things to Remember

- You will have recertify again, next year. If you get a letter from the USAC Lifeline Support Center asking you to recertify, you must do so within 60 days, or you'll lose your Lifeline discount.
- Use it or lose it. If your Lifeline-supported service is free (your company doesn't send you a bill), use it at least once every 90 days. If you don't, you will get a 15-day notice to use it or it will get turned off.

Upcoming NLAD Enhancement

Address Workflow Update



Upcoming NLAD Enhancement

Update Subscriber Address

- As part of continual system improvements, USAC is streamlining the process of updating a subscriber's address.
- **Upcoming change:** This fall, USAC will release changes to the NLAD “Update Subscriber” feature to:
 - Reduce the service provider and consumer burden required to resolve address errors,
 - Streamline the process of updating and verifying an existing subscriber's new address, and
 - Ensure continued program compliance.

Upcoming NLAD Enhancement

New Address Resolution



- Address updates will no longer be rejected by **NLAD** for AMS and/or IEH errors.
- New addresses which receive an AMS and/or IEH error will automatically be sent to the **National Verifier** for address resolution.
- Consumers will be expected to resolve their address errors in the National Verifier portal or via mail, to maintain their enrollment status.
- **USAC will de-enroll consumers that fail to resolve errors associated with their address update within 30 days of when USAC sends the notice.**

Upcoming NLAD Enhancement

New Address Resolution

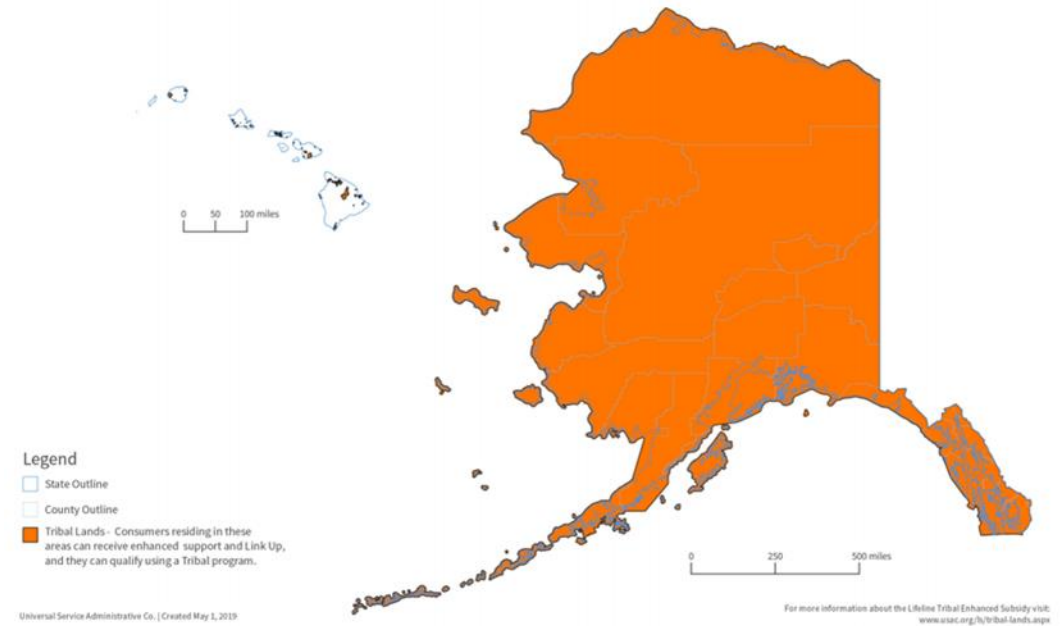
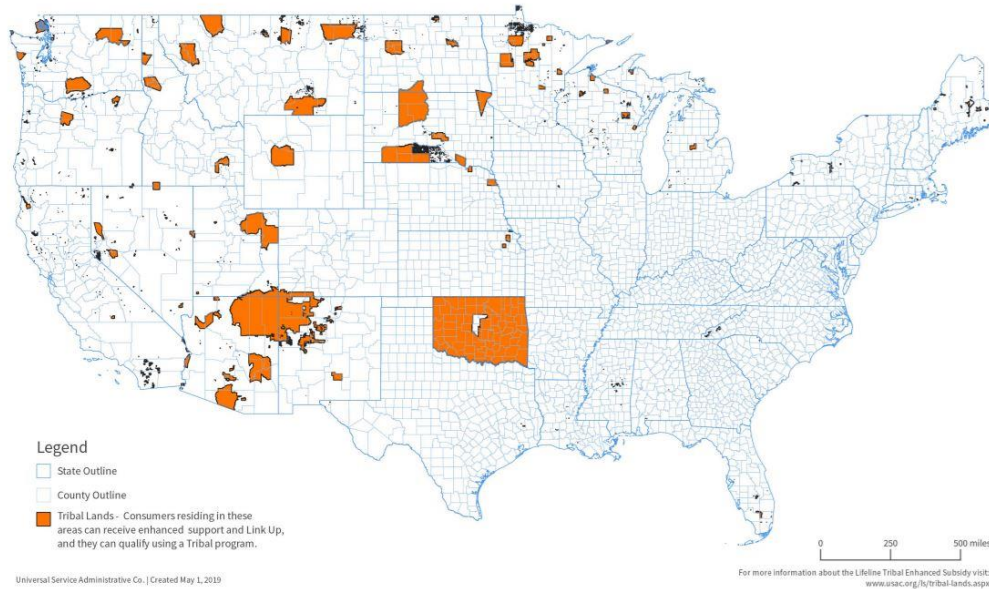
System	Current Process	New Process
-	The consumer informs their SP of the address change.	The consumer informs their SP of the address change.
NLAD	The SP attempts to update the address in NLAD.	The SP attempts to update the address in NLAD.
NLAD	<p>If new address passes AMS and IEH check, update is successful.</p> <p>If new address fails AMS and/or IEH and errors are not resolved in the NV, the new address is rejected by NLAD.</p>	<p>New address is successfully updated in NLAD.</p> <p>SP is informed in real-time if new address fails AMS and/or IEH. If there are failures, the address resolution is initiated in the NV.</p>
National Verifier	SP instructs or assists consumer to resolve address errors in the NV portal or via mail.	USAC instructs or assists consumer to resolve address errors in the NV portal or via mail. Consumer must resolve errors within 30 days of notification to avoid de-enrollment.
National Verifier	Consumer successfully resolves address errors in the NV portal/by mail and informs SP.	Consumer successfully resolves address errors in the NV portal/by mail.
NLAD	SP updates address in NLAD.	Address update resolution process is complete and the consumer remains enrolled.

Resolving Tribal Address Errors

Resolving Tribal Address Errors

Federally-Recognized Tribal Land

Eligible Tribal Lands for the Lifeline Program



Note: In order to receive the enhanced tribal benefit, a consumer must live on Federally-Recognized Tribal Land. This is best confirmed by latitude and longitude coordinates.

Resolving Tribal Address Errors

Tribal Applicants Via the NV Portal

- If a consumer entered a descriptive address or another address that cannot be verified, they will need to provide more information using this mapping tool

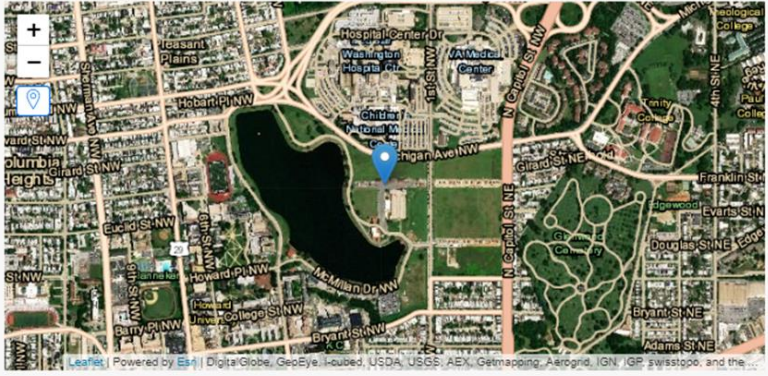
We Didn't Recognize Your Address

The U.S. Postal Service could not find the address you gave us.

Show us that your address is right.

This is the information you gave us.

We need to confirm where you live on the map below. Please double click on the map or use the (+) button on the top left to zoom in on the map. You can drop a pin once you have found your address on the map.



Note: If you have not zoomed in far enough on the map, you will not be able to drop a pin on the map.

Latitude	Longitude
<input type="text" value="38.92529"/>	<input type="text" value="-77.01403"/>

Resolving Tribal Address Errors

Tribal Applicants Via the NV Portal

- The map will try to locate the consumer's home based on the information originally entered
- The latitude and longitude fields will automatically populate
- The consumer can move the pin around to locate where they live

Note: The consumer must drop the pin on federally-recognized Tribal land in order to receive the enhanced Tribal benefit. If the pin is dropped outside of federally-recognized Tribal land, the consumer will only qualify for the standard Lifeline benefit.

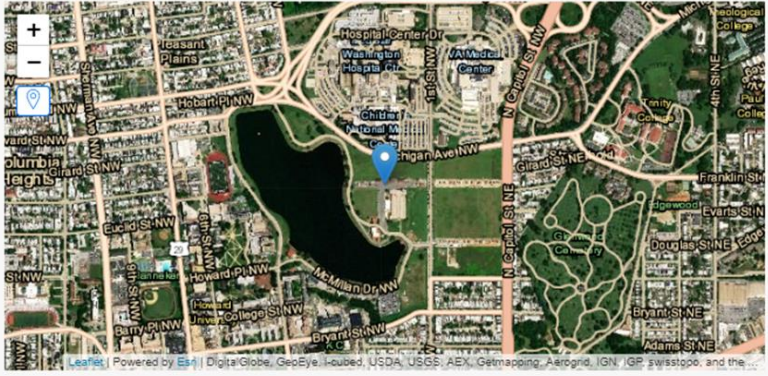
We Didn't Recognize Your Address

The U.S. Postal Service could not find the address you gave us.

Show us that your address is right.

This is the information you gave us.

We need to confirm where you live on the map below. Please double click on the map or use the (+) button on the top left to zoom in on the map. You can drop a pin once you have found your address on the map.



Note: If you have not zoomed in far enough on the map, you will not be able to drop a pin on the map.

Latitude	Longitude
38.92529	-77.01403

[Back](#) [Next](#)

Resolving Address Errors

Tribal Applicants Via Paper Forms

Option 1: If a consumer has access to the Internet but does not want to submit an online application, USAC recommends that they use a mapping tool (such as Google maps) to drop a pin where they live

- Consumers may take a screenshot of the mapping tool and print it out (the image should include the dropped pin and the consumer's latitude and longitude coordinates).

Resolving Address Errors

Tribal Applicants Via Paper Forms

Option 2: A consumer may use a map from their community (e.g., from a gas station or if their phone/internet company or Tribal government has maps of the area)

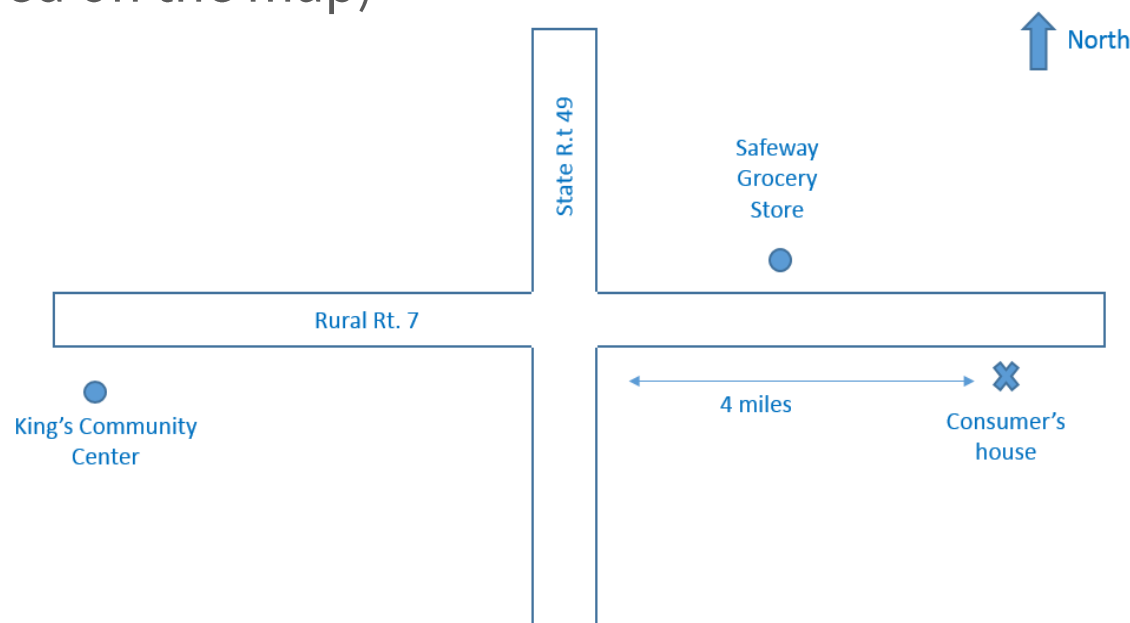
- The consumer must circle the location of their home
- If coordinates are known, the consumer should write them on the map (otherwise, USAC will determine coordinates based on the map)

Resolving Address Errors

Tribal Applicants Via Paper Forms

Option 3: Consumers may hand draw a map to show where they live

- This map should include **cross roads, identifiable landmarks, and distances**
- If coordinates are known, the consumer should write them on the map (otherwise, USAC will determine coordinates based on the map)



Upcoming NLAD Enhancement Tribal Error Codes

Upcoming NLAD Enhancement

Tribal Error Codes

Current State

- When a service provider attempts to enroll a consumer into NLAD *with* the enhanced Tribal benefit *and* the consumer is *ineligible*, the transaction will result in an error.
- The error carriers receive is not specific. The error states the subscriber's location is not eligible for the Tribal benefit.

Upcoming NLAD Enhancement

Tribal Error Codes

Future State

- When a service provider attempts to enroll a consumer into NLAD *with* the enhanced tribal benefit *and* the consumer is *ineligible*, the transaction will result in **one of three errors**.
- This will provide carriers with more detail about why a consumer is ineligible for the enhanced benefit.
- Remember, it is imperative USAC is able to identify where a consumer lives to determine their eligibility for this additional benefit.

Upcoming NLAD Enhancement

Tribal Error Codes

Future State

- The error that they receive will be specific to one of the 3 following **situations**:
 - USAC verified the consumer's address and the location is not on Tribal lands.
 - USAC was unable to verify the consumer's address and the consumer either doesn't have a qualified app in National Verifier or there is a qualified app but it does not provide coordinates.
 - USAC was unable to verify the consumer's address. The consumer did provide coordinates in the National Verifier, but those coordinates are either not on Tribal land or they are invalid because they are not in the same state as the consumer's residential state.

Upcoming NLAD Enhancement

Tribal Error Codes

Carrier Impact

- Any NLAD user that enrolls consumers on Tribal lands will see new error messages with this release.
- NLAD API users will need to make some system adjustments, and will be able to test those in a staging environment prior to the production release.

Upcoming NLAD Enhancement

Tribal Error Codes

Timeline

- The release is currently scheduled for this fall.
- With COVID-19 the release date may be subject to change.
- The change will be released in the test environment at least 4 weeks prior to any release.
- More information and training will be forthcoming.

Questions?

Lifeline Program Resources

- Visit the [COVID-19 Response](#) page on the USAC website
- View [past trainings](#) on the USAC website
- Email LifelineProgram@usac.org
- Call Lifeline Support (800) 234-9473

Lifeline Support Contact Information

By Phone:

- Agents available 7 Days a Week, 9 A.M. to 9 P.M. ET
- **Please call** (800) 234-9473

By email:

- **Email us** at LifelineSupport@usac.org

By Mail:

Lifeline Support Center

PO Box 7081

London, KY 40742

Learn More about Lifeline

- Sign up for Lifeline Program email updates and upcoming events
 - Visit usac.org and click “subscribe” in the upper-right corner
- Need help? Contact us!
 - General: LifelineProgram@usac.org



Universal Service
Administrative Co.