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
- **A copy of the slide deck is in the “Handouts” section of webinar panel**
Course Objectives

At the end of the course, you will...

...be able to:

• Help a consumer submit supporting documentation via mail or the NV Service Provider Portal
• Identify when and which documents should be utilized depending on the eligibility error type

...understand:

• When document submission is appropriate
• How to navigate common document submission scenarios
• The role of the Lifeline Support Center, service providers, and consumers in the document submission process
Course Overview

01 | Introduction
   ▪ What is the role of the document submission process? What has changed?

02 | Submitting documentation with assistance from a service provider
   ▪ How can a service provider representative assist consumers in submitting documents via the NV Service Provider Portal?
   ▪ What are the error types that require document submission?
   ▪ When is document submission necessary?

03 | Submitting documentation via mail
   ▪ How can a consumer submit documents via mail?
   ▪ Where can consumers mail their documentation to?

04 | Summary
   ▪ What are the key themes and takeaways?
Section 1: Introduction
Introduction
Document Submission Changes

With the introduction of the National Verifier (NV) System, the document submission processes have changed:

- **Service providers can assist the consumer** in submitting required documents directly via the NV Service Provider Portal, or by mail.

- The Lifeline Support Center will review and adjudicate decisions on consumer applications for Lifeline. This change **centralizes** and **standardizes manual reviews**.

- Consumers can **check their application status** or **enrollment status** by contacting the Lifeline Support Center or by checking with their service provider through whom they initially submitted their application.
Document Submission

If a consumer is not immediately found eligible, the consumer can ask the service provider representative for help to start the document submission process, whereby the consumer may prove their eligibility.

Consumers may resolve certain errors by providing additional information directly to the service provider representative. Other errors will require the consumer to submit documentation to the Lifeline Support Center for review.

The Lifeline Support Center manually reviews documents and updates a consumer’s eligibility status in the NV Service Provider Portal.

- Service provider representatives can help consumers to submit documentation through the following methods:
  - Upload documentation via the NV Service Provider Portal.
  - Send in documentation via mail.

Eligibility errors cannot be resolved by calling the Lifeline Support Center.
Section 2: Document Submission with Assistance from a Service Provider
Submitting Documentation with Assistance from a SP
Process Overview

A service provider representative can help a consumer submit documentation through the NV Service Provider Portal. They will follow these steps:

1. A service provider representative will help a consumer **submit an application.** The system will **display errors** associated with the application.

2. A service provider representative will help the consumer **upload appropriate documents corresponding to the error types** to supplement the application form.

3. The Lifeline Support Center will access the documents and **prepare for manual review.**

4. The **Lifeline Support Center will process the manual review.** If any of the initial documentation was insufficient, the service provider representative will be notified.

5. The Lifeline Support Center will log the outcome of the manual review into the NV Web Portal.

6. The service provider representative will be able to see the consumer’s **updated eligibility status** on the NV Service Provider Portal.
Submitting Documentation with Assistance from a SP
Start New Application/Review Application Status

Once logged into the NV, the service provider representative will be redirected to the NV Service Provider Portal home page.

Welcome Service Provider Agent

Pending Applications

Service provider representatives can use the search function to find a consumer’s application. They can search by entering a consumer’s First Name, Last Name, or Application ID.

If the consumer’s application had an error that requires submitting documentation, the service provider representative will see a “More Documentation Needed” status corresponding to the consumer’s name.
# Submitting Documentation with Assistance from a SP

## Error Types

An application may result in an error which requires the consumer to submit additional documentation* for Lifeline Support Center manual review.

<table>
<thead>
<tr>
<th>Error</th>
<th>Document/Proof Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMS (Address Matching Service Error)</td>
<td>Address validation</td>
</tr>
<tr>
<td>Duplicate Address</td>
<td>Duplicate address flow</td>
</tr>
<tr>
<td>Under 18</td>
<td>Proof of emancipated minor status</td>
</tr>
<tr>
<td>TPIV (Identity Verification Error)</td>
<td>Proof of identity</td>
</tr>
<tr>
<td>Program Eligibility</td>
<td>Proof of program/income eligibility</td>
</tr>
</tbody>
</table>

- The Address Matching Service (AMS) error requires the consumer to provide validation of address.

- The Duplicate Address error requires the consumer to complete the duplicate address flow (in the NV Service Provider Portal) or the submission of the Household Worksheet (if submitting by mail).

*A list of acceptable documents can be found [here](http://www.usac.org/lifeline/eligibility/national-verifier/acceptable-documentation-for-the-national-verifier/)*
Submitting Documentation via NV Service Provider Portal

Document File Restrictions

When submitting documents as a part of the document submission process, consumers and service provider representatives should be mindful of document file restrictions.

Accepted file types:
- .JPG
- .JPEG
- .PNG

File Size:
Files must also be 10MB or smaller in size.

If a document is not of an acceptable file type or size, the system will display an error message.
Resolving Errors in the Portal
Submitting Documentation with Assistance from a SP Address Validation – AMS

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: AMS** – The consumer’s address could not be verified.

To validate the address provided in the application, the service provider representative can either enter the consumer’s geographical coordinates (latitude and longitude) of the address or drop a pin on the map shown. The system will automatically calculate the corresponding latitude and longitude coordinates.
Submitting Documentation with Assistance from a SP
Submit Documentation – Duplicate Address

- **Eligibility Result:** “More Documentation Needed”
- **Error Type:** Duplicate Address – Someone at the address provided is already receiving Lifeline.

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 (food, etc.) and live in the same dwelling unit. I am not related to each other.
- [ ] I understand that I am only allowed to get one Lifeline benefit per household, not per person.
- [ ] I understand that this form 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.

Note: The benefit recipient must be the one to initial with their initials, even when applying with a Benefit Qualifying Person (BQP).

For this error, the service provider representative needs to have the consumer complete the duplicate address flow or mail in the Household Worksheet.
Submitting Documentation with Assistance from a SP
Submit Documentation – Duplicate Address

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: Duplicate Address** – Someone at the address provided is already receiving Lifeline.

**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.

**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 1-877-524-1315.

**Note:** The benefit recipient must be the one to initial with their initials, even when applying with a Benefit Qualifying Person (BQP).
Resolving Errors with Documents
Submitting Documentation with Assistance from a SP
Submit Documentation – Under 18

- Eligibility Result: “More Documentation Needed”
- Error Type: Under 18 – The consumer entered a date of birth that indicating the consumer is less than 18 years of age.

They Must Be at Least 18 Years Old to Qualify for Lifeline

Only emancipated minors can qualify for Lifeline under the age of 18.

Date of Birth: February 12, 2003

If you see a typo in their date of birth, fix it here.

Tell the subscriber that they have to wait until they are 18 to get Lifeline.

Their parent or guardian may be able to apply if their household does not already get Lifeline. They are only allowed to get one Lifeline benefit per household, not per person.

Return to Your Account

[Image of website interface]

Are they an emancipated minor?
If they are an emancipated minor, we need proof. Hide the list of accepted documents and upload one.

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by, they will need to come back to this site and fill this form out again.

We need to see a copy of one of these:
- Court document or certificate that says they are an emancipated minor
- Birth certificate that shows they are at least 18 years old

Give us your documents
Upload the file here

Choose file

Back

Next
Submitting Documentation with Assistance from a SP
Submit Documentation – TPIV (Deceased)

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: TPIV (Deceased)** – The consumer’s information corresponds to a **person that is deceased**.

**We Couldn't Verify Their Information**

This is the information they gave us.

- **Full Legal Name:** Lifeline Subscriber
- **Date of Birth:** February 12, 1969
- **Last 4 SSN:** 1938

If you see a typo in their information, fix it here.

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by then, they will need to come back to this site and fill this form out again.

**Help us correct this error.**
We need to confirm some more information to verify their information. Please show us something from one of the following lists.

**Show us 1 item:**
To be accepted, the copy must be dated within three months of the review date, have their first and last name, date of birth, and SSN on it.
- Government assistance program document
- Unemployment/worker’s compensation statement of benefits

Or, show us 1 item below AND a document(s) that has their first name, last name, date of birth, and Social Security Number (SSN) on it:
To be accepted, the copy must be dated within three months of the review date.
- Current utility bill
- Income statement such as a paystub
- Mortgage or lease statement
- Retirement/ension statement of benefits
- Notarized letter affirming the subscriber’s identity and alive status

**Give us your documents.**

Upload the file here

[Choose file]

[Back] [Next]
Submitting Documentation with Assistance from a SP
Submit Documentation – TPIV (SSN4)

• Eligibility Result: “More Documentation Needed”
• Error Type: TPIV (SSN4) – The last four digits of the consumer’s social security number could not be verified.

We Didn't Recognize Their Social Security Number (SSN)
We couldn’t match the subscriber’s SSN to their full legal name.

Show that their Social Security Number is right.

This is the information you gave us.

<table>
<thead>
<tr>
<th>Full Legal Name</th>
<th>Lifeline Subscriber</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last 4 SSN</td>
<td>1938</td>
</tr>
</tbody>
</table>

If you see a typo in their name or Social Security Number (SSN), fix it here.

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by then, they will need to come back to this site and fill this form out again.
Submitting Documentation with Assistance from a SP Submit Documentation – TPIV (DoB)

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: TPIV (DoB)** – The consumer’s **date of birth** could not be verified.

---

**We Didn't Recognize Their Date of Birth**

We couldn't match the subscriber's date of birth to their full legal name.

**Show that their date of birth is right.**

This is the information you gave us.

<table>
<thead>
<tr>
<th>Full Legal Name:</th>
<th>Lifeline Subscriber</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth:</td>
<td>February 12, 1989</td>
</tr>
</tbody>
</table>

**Show us that this information is right.**

We need to see an official document that has the subscriber’s first name, last name, and date of birth on it. Please show us a copy of one of the following:
- Driver’s license (unexpired)
- Birth certificate
- Passport (unexpired)
- Certificate of naturalization (or certificate of U.S. Citizenship)
- Permanent Resident Card (unexpired)

See more ways to prove their identity.

**Give us your documents.**

Upload the file here

[Choose file]

[Back]  [Next]

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by, they will need to come back to this site and fill this form out again.
Submitting Documentation with Assistance from a SP
Submit Documentation – TPIV (Identity)

• **Eligibility Result:** “More Documentation Needed”
• **Error Type:** TPIV (Identity) – Multiple parts of the consumer’s identity could not be verified.

Sometimes, multiple parts of a consumer’s identity (e.g. name, DOB, SSN) may not be verifiable. In this case, the service provider representative will see which document(s) the consumer needs to submit to resolve the error.
• Eligibility Result: “More Documentation Needed”
• Error Type: Eligibility – The consumer could not be automatically verified as eligible through a qualifying program.

We Could Not Confirm That They Are in One of These Programs
To qualify for Lifeline, the subscriber needs to give us more information.

Which program do they want to qualify through?
They will need to show proof that they are in the program they choose.
Choose one.
- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program (only choose if they live on tribal lands)
- They don’t participate in one of these programs, and want to qualify through income
- They are not in any of these programs, but their child or dependent is in one of these programs

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by then, they will need to come back to this site and fill this form out again.

Show That They Are in SNAP
The Supplemental Nutrition Assistance Program (SNAP) used to be called Food Stamps.
The state might use a different name for SNAP. Look it up on this list of SNAP names by state.

We need to see proof of SNAP participation such as an award letter or a benefit statement.

SNAP eligibility documents should include the consumer’s full legal name (or the SP’s legal name), the program name, and must be issued within the past 12 months or have an expiration date in the future.

More information about acceptable SNAP eligibility documents can be found on USA.gov’s website.

NOTE: All eligibility documents must be issued by the state, federal, or local government, Tribal organization, or the authorized agent.

Give us your documents
Upload the file here
Choose file

Back Next
Submitting Documentation with Assistance from a SP
Submit Documentation – Program Eligibility

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: Eligibility** – The consumer could not be automatically verified as eligible through a qualifying program.

**We Could Not Confirm That They Are in One of These Programs**
To qualify for Lifeline, the subscriber needs to give us more information.

**Which program do they want to qualify through?**
They will need to show proof that they are in the program they choose.

- Choose one.
  - SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
  - Medicaid
  - Supplemental Security Income (SSI)
  - Federal Public Housing Assistance
  - Veterans Pension and Survivors Benefit Programs
  - Tribal Specific Program (only choose if they live on tribal lands)
  - They don’t participate in one of these programs, and want to qualify through income
  - They are not in any of these programs, but their child or dependent is in one of these programs

**Which tribal specific programs do they have?** Choose one.

- Bureau of Indian Affairs General Assistance
- Tribally-Administered Temporary Assistance for Needy Families (TANF)
- Food Distribution Program on Indian Reservations (FDPIR)
- Head Start (only if your household meets the Head Start income qualifying standard)

**Show That They Get Bureau of Indian Affairs (BIA) General Assistance**
To qualify for Tribal Lifeline, they must show that they reside on Tribal lands and participate in this program.

**We need to see a copy of one of these:**

- Award letter from the national or regional BIA office
- A check stub from the BIA that has:
  - The date
  - Name of the participant
  - Name of the program as BIA General Assistance

**Give us your documents**
Upload the file here

[Choose File]  [Next]
Acceptable eligibility documents must contain:

• The consumer’s name, or the name of consumer's benefit qualifying person (BQP);

• The name of the Lifeline-qualifying program, such as SNAP;

• The government or Tribal program administrator or the managed care organization (MCO) that issued the document; and

• An issue date within the last 12 months or a future expiration date that aligns with the benefit period.
Submitting Documentation with Assistance from a SP
Submit Documentation – Program Eligibility

• **Eligibility Result:** “More Documentation Needed”
• **Error Type: Eligibility** – If the consumer qualifies for Lifeline based on their income, they can choose this option.

---

We Could Not Confirm That They Are in One of These Programs
To qualify for Lifeline, the subscriber needs to give us more information.

Which program do they want to qualify through?
They will need to show proof that they are in the program they choose.

- [ ] SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- [ ] Medicaid
- [ ] Supplemental Security Income (SSI)
- [ ] Federal Public Housing Assistance
- [ ] Veterans Pension and Survivors Benefit Programs
- [ ] Tribal Specific Program (Only choose if they live on tribal lands)
- [x] They don’t participate in any of these programs, and want to qualify through income

(They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by then, they will need to come back to this site and fill this form out again.)

---

Show That They Qualify Through Their Income

How many people live in their 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).

- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4
- [ ] 5
- [ ] 6
- [ ] 7
- [ ] 8
- [ ] More than 8

(Next)
Submitting Documentation with Assistance from a SP
Submit Documentation – Program Eligibility

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: Eligibility** – If the consumer qualifies for Lifeline based on their income, they can choose this option.

Show That They Qualify Through Their Income

Is their annual household income the same or less than:
They can find this on their taxes under “Gross Annual Adjusted Household Income.”

$34,763

- Yes
- No

Once the consumer tells the service provider representative how many people live in their household, the consumer will then need to tell the representative if their annual income is more or less than the number being displayed. After selecting “Yes” or “No” based on the consumer’s response, the service provider representative will then click the “Next” button.
Submitting Documentation with Assistance from a SP
Submit Documentation – Program Eligibility

- **Eligibility Result:** “More Documentation Needed”
- **Error Type: Eligibility** – If the consumer qualifies for Lifeline based on their income, they can choose this option.

**Show That They Qualify Through Their Income**

*We need to see one of these:*
- The prior year’s state, federal, or Tribal tax return
- 3 pay stubs in a row (or a current income statement from your employer)
- Social Security statement of benefits
- Veterans Administration statement of benefits
- Unemployment or Workers’ Compensation statement of benefits
- Federal or Tribal notice letter of participation in General Assistance
- Divorce decree
- Child support award, or
- Other official document containing income information

**They Do Not Qualify for Lifeline Based on Their Household Income**

With a household of 4 they must have an annual income of less than or the same as $34,763.

**Do they participate in a government assistance program?**

- Yes
- No

They cannot apply for Lifeline because they do not qualify.

For more information about Lifeline, visit lifelinesupport.org

**If the consumer answered “Yes”,** they must provide proof of their income eligibility.

**If the consumer answered “No”,** they will not be able to prove eligibility via their income. They can prove eligibility through a qualifying program.
If the consumer is eligible only through a benefit qualifying person (BQP) within their household, the service provider representative can assist the consumer in verifying this information.

We Could Not Confirm That They Are in One of These Programs

To qualify for Lifeline, the subscriber needs to give us more information.

Which program do they want to qualify through?
They will need to show proof that they are in the program they choose.
Choose one.
- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program (only choose if they live on tribal lands)
- They do not participate in one of these programs, and want to qualify through income

We Need More Information

To qualify for Lifeline, the subscriber needs to show that their child or dependent qualifies through a government assistance program.

Is their child or dependent in any of these?
They will need to show proof that their child or dependent is in the program they choose.
Choose one.
- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program (only choose if they live on tribal lands)

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline. If we don’t receive this information by, they will need to come back to this site and fill this form out again.
Submitting Documentation with Assistance from a SP
Submit Documentation – Program Eligibility

• **Eligibility Result:** “More Documentation Needed”
• **Error Type: Eligibility** – The consumer could not be automatically verified as eligible through a qualifying program.

The service provider representative must choose all eligibility programs which qualify the BQP for Lifeline.
Questions?
Submitting Documentation with Assistance from a SP
Submit Documentation

The service provider representative must ensure the consumer understands, agrees to, and initials next to each of the following consent statements in order to submit their documentation:

Subscriber's Agreement
Please have the subscriber initial next to each statement and sign this form to finish the process.

I agree, under penalty of perjury, to the following statements:

Initial
LS
1. I or the person in my household that qualifies, do not qualify through a government program or income anymore.

Initial
LS
2. Either I or someone in my household gets more than one Lifeline benefit (including, more than one Lifeline broadband internet service, more than one Lifeline telephone service, or both Lifeline telephone and Lifeline broadband internet services).

Initial
LS
3. I agree that if I move I will give my service provider my new address within 30 days.

Initial
LS
4. I know that my household can only get one Lifeline benefit and, to the best of my knowledge, my household is not getting more than one Lifeline benefit.

Initial
LS
5. I understand that I have to tell my service provider within 30 days if I do not qualify for Lifeline anymore, including:

Initial
LS
a. I or the person in my household that qualifies, do not qualify through a government program or income anymore.

Initial
LS
b. Either I or someone in my household gets more than one Lifeline benefit (including, more than one Lifeline broadband internet service, more than one Lifeline telephone service, or both Lifeline telephone and Lifeline broadband internet services).

Note: The benefit recipient must be the one to initial with their initials, even when applying with a Benefit Qualifying Person (BQP).
Submitting Documentation with Assistance from a SP
Submit Documentation

- After the consumer initials next to the consent statements, they must type their name in order to submit their documentation.
- The consumer’s typed name will serve as an e-signature and they must check the box in order to acknowledge they understand their digital signature acts as a written signature on paper.

After the consumer signs, the service provider representative clicks “Submit” to conclude the document submission process. The consumer’s status will update to “Pending Review”.

It is critical the consumer understands and consents to the information on this tab. A person assisting the consumer in submitting their application cannot initial the boxes on the form or enter the e-signature for the consumer.
Submitting Documentation with Assistance from a SP
Submit Documentation

After the service provider representative uploads the consumer’s documents, the system will display the following message regarding the manual review process:

**We Are Checking Their Documents**

We need to check their documents to make sure they qualify. When we finish, **the status on your account dashboard will change**.

**This will take a few minutes.**

Please come back when the status changes on your account dashboard.

The Lifeline Support Center hours are 9 a.m. - 9 p.m. ET, Monday - Sunday. If you’re using the system outside of those hours, please check back today or tomorrow morning after 9 a.m. ET to see if they qualify for Lifeline.

**If they qualify...**

You will have 90 days to enroll Lifeline Subscriber in NLAD.

**If they do not qualify...**

We’ll ask for more information or tell you what to do next. You will have until 3/23/2019 (Based on US Eastern Time) to send us the information or complete the next steps.

The service provider representative can check the consumer’s status through their NV Service Provider Portal account.
Submitting Documentation with Assistance from a SP Qualified Decision

If the consumer is eligible, the service provider representative will see the applicant’s eligibility status update to “Qualified” in the status column home page. They can then enroll the consumer in NLAD.
Submitting Documentation with Assistance from a SP Qualified Decision

If the Lifeline Support Center determines the documents provided are insufficient and rejects them, the service provider representative will see the screen below.

The status of the consumer’s application will be updated to “More Documentation Needed.”
Submitting Documentation
Safeguarding Consumer Information

Service Providers are responsible for keeping consumer information safe:

A consumer may have to submit documentation to prove eligibility for Lifeline. The consumer documentation will likely contain sensitive personally identifiable information (PII).

Service providers, Lifeline navigators, and anyone else who may assist consumers in submitting documentation must prioritize the protection of this information from anyone other than USAC and the Lifeline Support Center.

Therefore, once the consumer has enrolled in Lifeline, decided to end the application process, or received an ineligibility status for Lifeline, service providers must destroy (if in paper form) or delete (if in electronic form) any copies of sensitive documents in their possession. The NV will retain the necessary consumer information in its records.
Service Provider Involvement
Responsibilities

Service provider representatives are **able** to aid consumers by:

- Providing instructions and guidance on documentation required to address application errors
- Submitting consumer documents on the consumer’s behalf via the NV Service Provider Portal

Service provider representatives are **unable** to aid consumers by:

- Directly using a NV Consumer Portal account or asking for a consumer’s credentials
- Submitting documentation without the consumer’s consent
- Initialing the consent statements or signing the e-signature on behalf of the consumer
- Submitting false documentation or information
- Allowing the service provider browsers to store NV Consumer Portal credentials
Submitting Documentation with Assistance from a SP Lesson Summary

You have completed the Submitting Documentation with Assistance from a Service Provider Section. In this section, you have learned:

- A consumer can upload documentation with assistance from a service provider representative via the NV Service Provider Portal.

- There are three error types that require document submission: TPIV (identity error), Under 18 error, and Program Eligibility error. A consumer can also receive a Duplicate Address error or an AMS error, but only additional information will need to be submitted through the service provider representative, not additional documentation.

- Depending on the error type, different types of documentation can be utilized. It is possible that one single document could be used to address multiple errors.

- If a consumer’s initial eligibility check is unsuccessful and they intend to apply for Lifeline through a dependent or child (BQP), the consumer must submit the BQP’s information to confirm eligibility.
Questions?
Section 2: Submitting Documentation via Mail
Submitting Documentation via Mail
Overview

- Consumers can address errors in their Lifeline application, by choosing to mail in copies of the documentation required.

- Consumers need to attach a Lifeline Program Cover Sheet to the copies of the documents being sent. The consumer must include the consumer’s last name and application ID.

- The address to which consumers can mail copies of documents can be found at www.lifelinesupport.org. The consumer can also call the Lifeline Support Center to find out the mailing information.

- A list of acceptable documents to send can be found here. (http://www.usac.org/lifeline/eligibility/national-verifier/acceptable-documentation-for-the-national-verifier/)

⚠️ Eligibility errors cannot be resolved by calling the Lifeline Support Center.
Resolving Eligibility Errors for Paper Applications

Consumers who apply using a paper form can resolve an eligibility error by:

1. Submitting a copy of their proof of participation in a qualifying program that contains:
   - The consumer's name, or the name of consumer's benefit qualifying person (BQP);
   - The name of the Lifeline-qualifying program, such as SNAP;
   - The government or Tribal program administrator or the managed care organization (MCO) that issued the document; and
   - An issue date within the last 12 months or a future expiration date that aligns with the benefit period; or

2. Submitting proof that the consumer qualifies for Lifeline through their income.
Consumers who apply using a paper form can resolve an AMS error by:

1. Logging into the National Verifier portal and completing the application process
2. A printed satellite image with a mapping tool icon (pin) identifying the consumer’s residence and the latitude and longitude coordinates displayed from a mapping tool
3. A hand drawn document that identifies the consumer’s home address by identifying the nearest cross roads (or mile markers), identifiable landmarks, and distance between the locations (see example on the next slide)
   - Lifeline Support Center will use hand drawn map to identify approximate coordinates
4. A document that contains the consumers’ address such as an unexpired drivers license, utility bill or a statement issued by the state, federal or Tribal authority (see the list of A codes for all acceptable documents)

*USAC strongly recommends options 1, 2 or 3 for consumers claiming the Tribal benefit*
Resolving AMS Errors for Paper Applications

- Include approximate distances
- Use circles for landmarks
- Be specific – name landmarks, not just grocery store
- Landmarks should be identifiable by non-locals
- Use X for consumer residence

North

4 miles

Rural Rt. 7

State Rt. 49

Safeway Grocery Store

King's Community Center

Consumer’s house
Resolving Duplicate Household Errors for Paper Applications

Consumers who apply using a paper form can resolve a duplicate household error by:

- Completing and submitting the Lifeline one-per household worksheet
Submitting Documentation via Mail Decision

Once the consumer mails in their documents and the information is received, the Lifeline Support Center will conduct a manual review and update the consumer’s eligibility decision.

To check on the status of a Lifeline application,

- If the consumer applied through a service provider representative and mails in documentation:
  - check with the service provider through whom the consumer initially applied
  - call the Lifeline Support Center

- If the consumer applied by mail, the consumer can indicate on the paper form if they would like to receive notifications via mail or email. Once the consumer application is processed, the consumer will receive status updates based on their indicated notification preference.

In any instance, the consumer can check the status of the Lifeline application by calling the Lifeline Support Center or by checking with the service provider representative through whom the consumer initially submitted their application.
Submitting Documentation via Mail
Lesson Summary

In this section, we have learned:

- Consumers who apply by paper form and need documentation to resolve and AMS error have additional documentation options.

- Depending on the error type, the consumer can submit different kinds of documentation. A consumer may be asked **to submit multiple pieces of documentation if they have multiple errors**.

- The consumer can check the status of their application by calling the Lifeline Support Center or by checking with the service provider through whom they initially submitted their application.

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**Lifeline Support Center (for Consumers)**

1-800-234-9473

Mon-Sun

9:00 AM to 9:00 PM ET
Questions?
Section 4: Summary
Summary
Key Takeaways and Tips

⚠️ If the consumer’s eligibility cannot immediately be confirmed, **the specific error type(s)** associated with the application will be provided.

⚠️ There are **three error types that require document submission**: TPIV (identity error), Under 18, and Program Eligibility.

📍 The Duplicate Address error and the AMS (address matching service) error require additional information to be entered directly through the NV Service Provider Portal, i.e. no documentation is required to be uploaded for these two errors.

  o The Address Matching Service (AMS) errors requires the consumer to provide validation of address.

  o The Duplicate Address error requires the consumer to complete the duplicate address flow (in the NV Service Provider Portal) or the submission of the Household Worksheet (if submitting by mail).

✉️ A consumer can submit documentation **through the mail** or with **assistance from a service provider representative through the NV Service Provider Portal**.
Looking Ahead
National Verifier Training and Support

Trainings for March Launch:

- **March 14, 2019:** National Verifier Training 1 (NV 101)
- **March 19, 2019:** National Verifier Training 2 (NV Overview)
- **March 21, 2019:** National Verifier Training 3 (Document Submission)
- **March 28, 2019:** National Verifier Training 4 (Correcting Errors)
- **April 2, 2019:** National Verifier Training 5 (TBD)
- **April 4, 2019:** National Verifier Training 6 (Helping Consumers without SP NV Portal)

Office Hours for March Launch:

- **March 26:** TBD

* Please note, USAC will add additional office hours as needed/requested.
Thank You!

• **Thank you for joining us!**

• If you received this webinars training invitation from another member of your team or know of others who should receive training invitations please email us at [LifelineProgram@usac.org](mailto:LifelineProgram@usac.org) to be added to the **National Verifier training and outreach list** for these states.

• **Sign up for Lifeline Program email updates and upcoming events**
  • Visit usac.org/li and click “Subscribe” in the upper right hand corner

• **Need help? Contact us!**
  • General: [LifelineProgram@usac.org](mailto:LifelineProgram@usac.org)
## Key Definitions and Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
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<tbody>
<tr>
<td><strong>Apply / Check Eligibility</strong></td>
<td>Consumer submits their Application Form via the NV Web Portal, mail, or a service provider (SP) to determine their Lifeline eligibility.</td>
</tr>
<tr>
<td><strong>Benefit Qualifying Person (BQP)</strong></td>
<td>The person in the consumer’s household who is eligible for Lifeline Program benefits when the consumer does not qualify. Typically, this person qualifies for Lifeline Program benefits, but cannot subscribe to a carrier on their own, and is a dependent of the consumer.</td>
</tr>
<tr>
<td><strong>Document Submission</strong></td>
<td>Consumer submits copies of official documents that prove their identity, eligibility status, or address using the NV Web Portal or mail.</td>
</tr>
<tr>
<td><strong>Enroll</strong></td>
<td>After receiving a favorable eligibility result, the consumer contacts a participating service provider to start receiving their Lifeline service and benefit.</td>
</tr>
<tr>
<td><strong>Exception Management</strong></td>
<td>Lifeline Support Center representative reviews consumer documentation in order to reach a decision on a consumer’s initial failed eligibility decision.</td>
</tr>
<tr>
<td><strong>Hard Error</strong></td>
<td>A problem with a consumer’s Lifeline application that prevents it from being submitted. For example, entering a number into the &quot;Name&quot; field. Hard errors can be resolved by fixing or re-entering the information.</td>
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# Key Definitions and Terms

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<tr>
<td>Household Worksheet</td>
<td>This worksheet must be submitted in cases when multiple eligible consumers who are not part of the same household or family live at the same address.</td>
</tr>
<tr>
<td>Interactive Voice Response (IVR)</td>
<td>Automated system that allows humans to interact with a computer over the phone, through the use of voice, touchpad, and dialing.</td>
</tr>
<tr>
<td>Lifeline Support Center</td>
<td>Responsible for conducting manual eligibility reviews and operating the consumer call center through their representatives.</td>
</tr>
<tr>
<td>National Verifier (NV) Web Portal</td>
<td>The National Verifier's website. A one-stop-shop where users can log in to check eligibility for Lifeline, view application status, resolve problems, and receive notifications.</td>
</tr>
<tr>
<td>NLAD (National Lifeline Accountability Database)</td>
<td>The NLAD system is the repository for enrolling consumers in the Lifeline program. NLAD initiates recertification and helps service providers initiate eligibility checks for benefit transfers and claim current consumers for facilitating disbursements.</td>
</tr>
<tr>
<td>Personally Identifiable Information (PII)</td>
<td>Personally identifiable information, such as name, e-mail address, or SSN.</td>
</tr>
<tr>
<td>Soft Error</td>
<td>An error in a submitted application that can be addressed through document submission.</td>
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