

2024 499-A Annual Training

Getting Started
February 12, 2024



Universal Service
Administrative Co.

DISCLAIMER

To accommodate all attendees, real-time closed captions will be present during this presentation. We apologize in advance for any transcription errors or distractions. Thank you for your support.

Housekeeping

- 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.
- This webinar is being recorded and a copy of the presentation will be on our website under Service Providers and “**Webinars**”.



Meet the Presenter

Amy Kavelman

Senior Telecom Industry Analyst | Contributor Operations

Ms Kavelman is a member of the 499 team that analyzes revenue reported on the FCC Form 499-A.

Amy also develops and delivers most of the 499 training. She has worked at USAC for 13 years.

Raised in central Illinois, she moved to the Washington DC area in 1997.

Email: Amy.Kavelman@usac.org

Webinar Overview

In this webinar, designed for all E-File users, we will review common topics associated with filing the annual form.

The annual filing is a required filing for all 499 Filer IDs.

The deadline to file is April 1, 2024.

Agenda

- Gather Information
- General Information
- Accessing E-File
- Create New Form
- Certification Process
- Questions

Quick Topic Guide

- Block 3 vs Block 4 [Slide 16](#)
- International & interstate allocation methods [Slides 21 – 27](#)
- E-File Login [Slide 30](#)
- Start new form [Slide 35](#)
- Data Entry Main Screen [Slide 37](#)
- Registration data entry [Slide 39,40](#)
- Revenue Reporting Sections [Slide 42](#)
- Revenue data entry [Slide 43,44](#)
- Suppress revenue questions [Slide 46](#)
- Data entry navigation [Slide 48](#)
- Officer Certification [Slide 51](#)
- After submitting [Slide 53](#)
- More training info [Slides 56,57](#)

Purpose of the FCC Form 499-A

Purpose of the Annual Form

A company reports their actual historical revenues on the FCC Form 499-A.

The 2024 FCC Form 499-A reports actual revenues from calendar year 2023.

USAC uses the revenue numbers on the 2024 FCC Form 499-A and compares them to the projected revenue from the quarterly FCC Forms 499-Q.

- November 2022 Filing (1Q23 estimate)
- February 2023 Filing (2Q23 estimate)
- May 2023 Filing (3Q23 estimate)
- August 2023 Filing (4Q23 estimate)

Annual True-Up

If the company's projected revenues for calendar year 2023, reported on the FCC Forms 499-Q, were **too high**, USAC will calculate your credit.

The company 'contributed' too much over the year.

If the company's projected revenues were **too low**, USAC will calculate a "true-up charge" to make up for the contribution deficit.

The company didn't contribute enough over the year.

These charges/credits will appear on the company's July invoice from USAC.

Who Must File

Almost **every** telecommunications service provider must file the FCC Form 499-A.

Who Must File

If you have a 499 ID, you must file.

- All VoIP providers, even resellers
- Audio bridging providers
- US Carriers that provide only international service
- Payphone aggregators
- *De minimis* service providers

Who Doesn't File?

Very few companies.

- Non-common-carriers that are *de minimis**
- Government entities, including companies that provide exclusively to government agencies*
- System Integrators*

*and do not provide VoIP services

Gather Materials

Information Needed

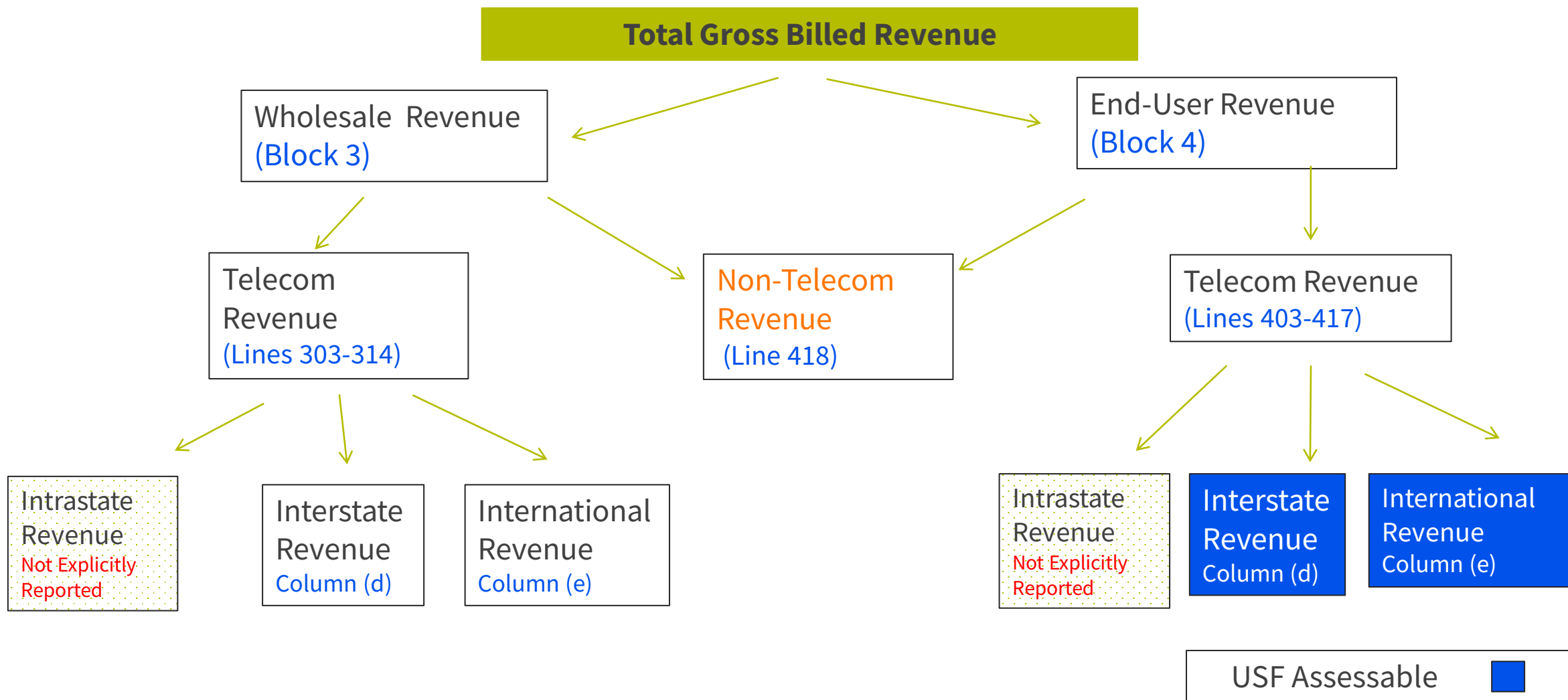
All information used should be saved and readily available for USAC if asked for review.

- Revenue reports for calendar year 2023
 - Detailed sales by product
 - Federal and state universal service fees collected from end users
 - USF funding received (if applicable)
- Traffic studies or CDRs used in calendar year 2023
- Reseller Certificates – signed in calendar year 2023

Wholesale vs End User

Block 3 vs Block 4

FCC Form 499-A Revenue Reporting



Block 3 vs. Block 4

Block 3: Carrier's Carrier Revenue Information

Revenue from sale of services to contributing service providers.

Block 4: End User and Non-Telecommunications Revenue Information

Revenue that does not qualify for Block 3 is reported in Block 4.

- End users are the final consumer of the service.
- Reseller revenue with *de minimis* amounts of interstate and international end user revenues. (These companies are not direct contributors).
- All other revenues, non-telecommunications in nature.

Reseller Certification

Definition of a Reseller

Any filer reporting revenue in Block 3 of the FCC Form 499-A must demonstrate that the reseller meets both parts of the reseller definition.

1. Purchasing service(s) for resale, at least in part, and incorporating the purchased services into its own offerings which are, at least in part, assessable U.S. telecommunications or interconnected VoIP service; and
2. Either directly contributing or have a reasonable expectation that another entity in the downstream chain of resellers directly contributes to the federal universal service support mechanisms on the assessable portion of revenue from offerings that incorporate the purchased services.

Last year, the instructions were clarified that the reseller's 499 Filer ID must be active.

Resellers attest to this definition by signing a Reseller Certificate. Certificates must be submitted annually. It is the responsibility of the wholesale carrier to request and collect these certificates.

Certificate Template

USAC | Service Providers | Resources | Forms & Instructions | **USAC-Designed Forms and Templates**

Resources

Forms

 Forms & Instructions

Prior Year Forms

USAC-Designed Forms and Templates

Upcoming Dates

Announcements

Quick Links



Glossary of Terms

Appeals and Audits

Multi-Factor Authentication

USAC-Designed Forms and Templates

Paper forms and templates designed to help gather information that is not found on an FCC Form. Follow instructions on each form for submission requirements.

Credit Balance Refund	Who Must File
Credit Balance Refund Form 	Use this form to request USAC refund your company's credit balance Learn more
FUSF Reseller Certification Template	Who Must File
FUSF Reseller Certification Template 	Wholesale carriers can use this template to get information from resale customers regarding their FUSF (federal Universal Service Fund) contributions Learn more

Certificates developed by the filer are acceptable as long as they meet the requirements outlined in the FCC Form 499-A instructions, pages 39 & 40.

Certificate Exemptions

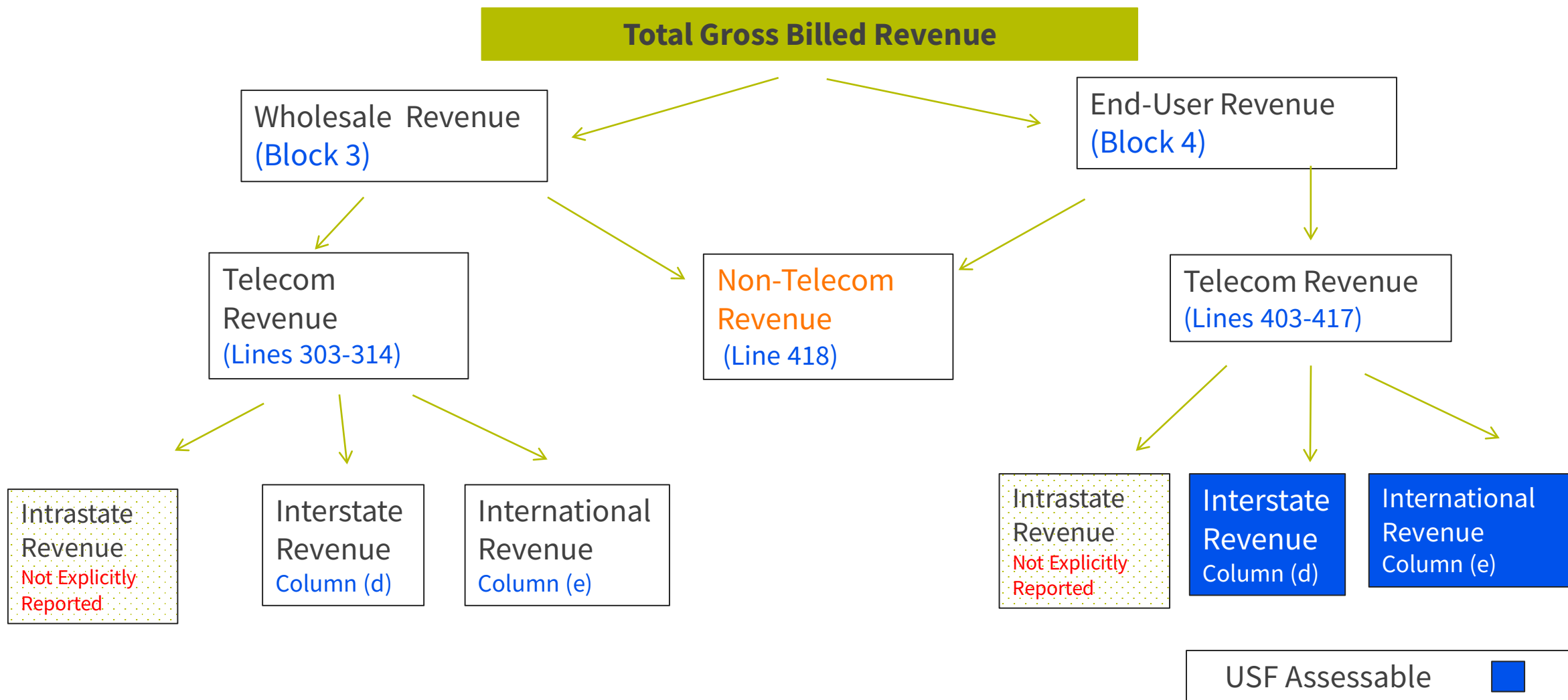
The following categories of revenues reported in Block 3 do not require a reseller certificate.

Category of Revenue	499-A Line #
Per-minute switched access charges and reciprocal compensation	Line 304
Revenues received from carriers as payphone compensation for originating toll calls	Line 306
Charges for physical collocation of equipment pursuant to 47 U.S.C. § 251(c)(6)	Line 307
Revenues that filers receive as universal service support from either states or the federal government	Line 308
Revenues received from another U.S. carrier for roaming service provided to customers of that carrier	Line 309

Questions?

Reporting Revenues Interstate and International

FCC Form 499-A Revenue Reporting



Reporting Revenues by Jurisdiction

All revenue is entered using the same methodology. Enter the total revenue in the far-left hand box, and then break out the interstate and the international. The percentages will be calculated after entering the revenue.

Jurisdiction is based upon traffic; the originating and terminating points of the final product.

Revenues from services offered under interstate tariffs should be identified as interstate revenues. (i.e. SLC & LNP)

404.5 Unbundled service - Interconnected VoIP only

\$ 0.00	0.00 %	0.00 %	\$ 0.00	\$ 0.00
Total Revenues	Interstate %	International %	Interstate Revenues	International Revenues

Total Revenue [Column (a)] = Intrastate Revenue + Column (d) + Column (e)

Enter **interstate** revenue in Column (d)

Enter **international** revenue in Column (e)

Methods Used to Determine Jurisdiction

1. Call detail records (CDRs)

This is truly the most accurate. If you can get these records and analyze, you should do so.

2. Traffic studies

By nature, less accurate. We'll discuss the requirements on the next slide.

3. Safe Harbor percentages outlined by the FCC

Interconnected and Non-Interconnected VoIP Safe Harbor

Interstate revenues associated with Lines 303.2, 311, 404.4, 404.5, 414.2 and 418.4.

- 64.9% of interconnected VoIP and non-interconnected VoIP telecommunications revenue

Wireless Safe Harbor

Interstate revenues associated with Lines 309, 409 and 410.

- 37.1% of cellular and broadband PCS telecommunications revenues
- 12.0% of paging revenues
- 1.0% of analog SMR dispatch revenues

Traffic Studies

- Filers may use traffic studies to determine the amount to attribute to interstate, and international revenue.
- Traffic studies must meet the following requirements (page 43 on instructions):
 - Traffic studies must be designed to produce a margin of error of no more than one percent with a confidence level of 95%
 - If a non-random sample is used (one example of this is a stratified sample) the traffic study should be described and an explanation provided as to why the non-random technique doesn't result in a biased sample
 - Traffic studies should include at least an explanation of the sampling and estimation methods used and an explanation of why it results in an unbiased result
- Email your 2023 traffic studies that support your revenues reported on the 2024 FCC Form 499-A to the address Form499@usac.org at the same time you submit your Form 499-A.

Use of Safe Harbors

- Safe harbor percentages **can not be** applied to universal service pass-through charges, fixed local, or itemized toll charges. All filers must report the actual amount of interstate and international revenues for these services.
- All affiliated wireless telecommunications providers, interconnected and non-interconnected VoIP providers must make a single (same) election for each type of safe harbor.
- Filers should use the same methodology (e.g. traffic study or safe harbor) to report interstate and international jurisdictions on the FCC Form 499-A as used on the FCC Form 499-Qs to forecast revenue in each quarter of the applicable calendar year.

Data Entry Using Safe Harbor Percentage

To enter revenues using the safe harbor percentage, enter the total service revenue in the 'Total Revenues' box.

The system does not allow you to enter a % in the 'Interstate %' box.

[Show Helpful Hint](#)

409 Monthly and activation charges

\$ 0.00	0.00 %	0.00 %	\$ 0.00	\$ 0.00
Total Revenues	Interstate %	International %	Interstate Revenues	International Revenues

On your calculator, take the amount of total revenue you entered and multiply by .371 (Cellular Safe Harbor %) and enter the resulting answer in the 'Interstate Revenues' box.

You'll then see the 'Interstate %' box auto populate with the 37.1%.

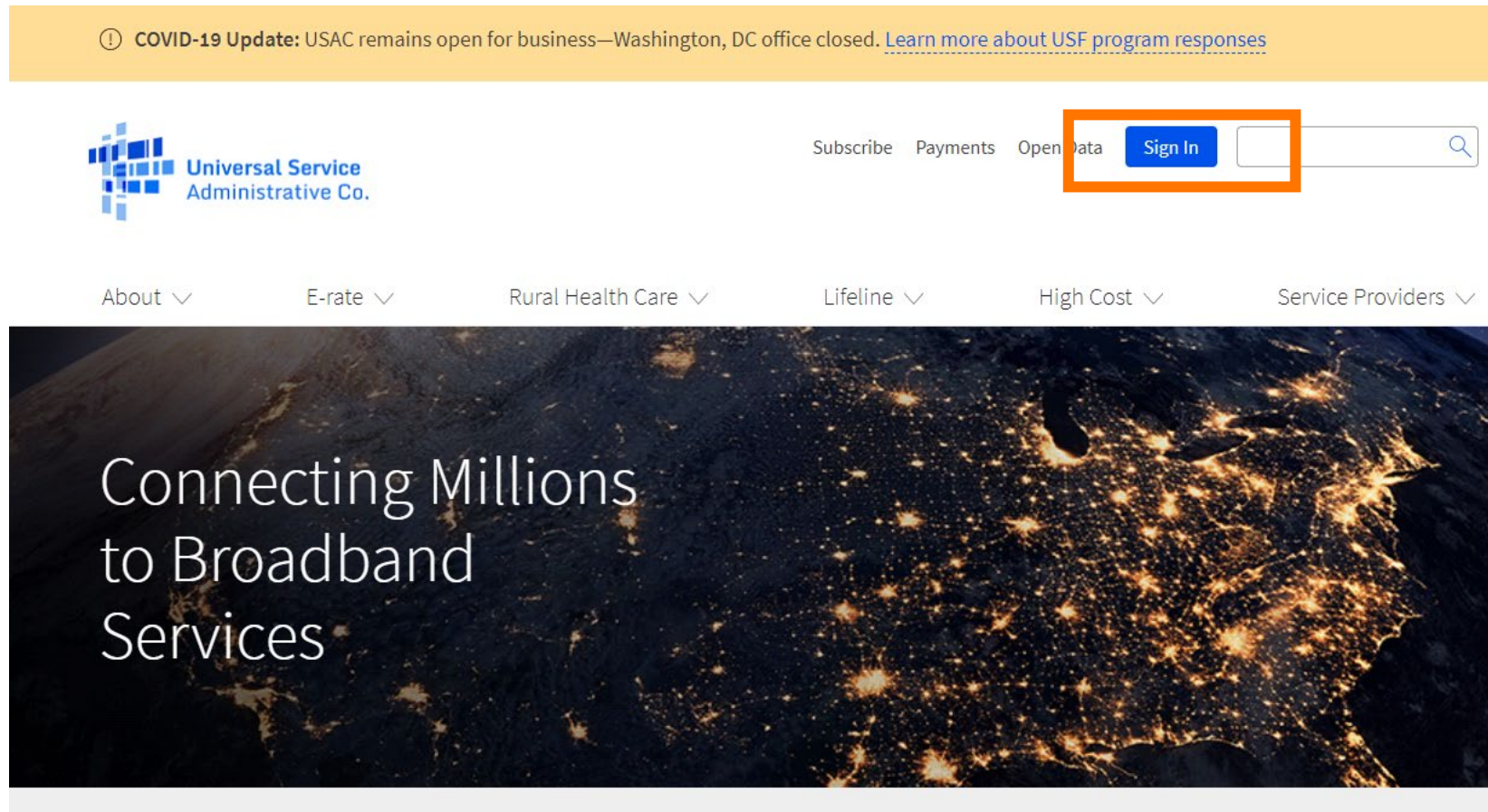
Questions?

Data Entry in E-File

Logging in to E-File

USAC's main website: usac.org

Click blue “Sign In” button at the top right side of the screen



Systems Notification Screen

EPC users and BEAR Form filers: If this is your first time logging in to One Portal, please read this information carefully.

USAC has added multifactor authentication (MFA) to increase the security of our Universal Service Fund (USF) IT applications. The first time you sign into an application, the system will prompt you to set up MFA for your account. To do this:

1. Click the blue **Continue** button below.
2. Click the **Forgot Password** link.
3. Enter your Username (your email address) and click **Reset via Email**.
4. When you receive the email, click the link to create a password. Your password must be at least eight characters long and include one lowercase letter, one uppercase letter, one number, and one special character.
5. Accept the system's terms of use and click **Sign In**.
6. On the next page, confirm the email associated with your account and click **Send Email**.
7. Check your email for a verification code.
8. Enter the code and click **Verify**.

After logging in, you will see USAC's new single portal application dashboard if you have access to more than one application. On this page you can access all of the USF applications associated with your log in. This means users no longer have to sign into multiple applications to interact with different USF programs.

From the dashboard, you can visit the "Settings" page to add a cell phone number to your account. This will allow you to receive verification codes via either email or text message when you log in in the future.

To learn more about USAC's MFA and to find a list of all USF IT applications included in the single portal, visit [USAC's website](#). If you cannot access the email associated with your account and need to set up a new log in, please contact your organization's USF administrator. If you need to reset your password, click the "forgot password" link. More detailed instructions are available in [this video](#).

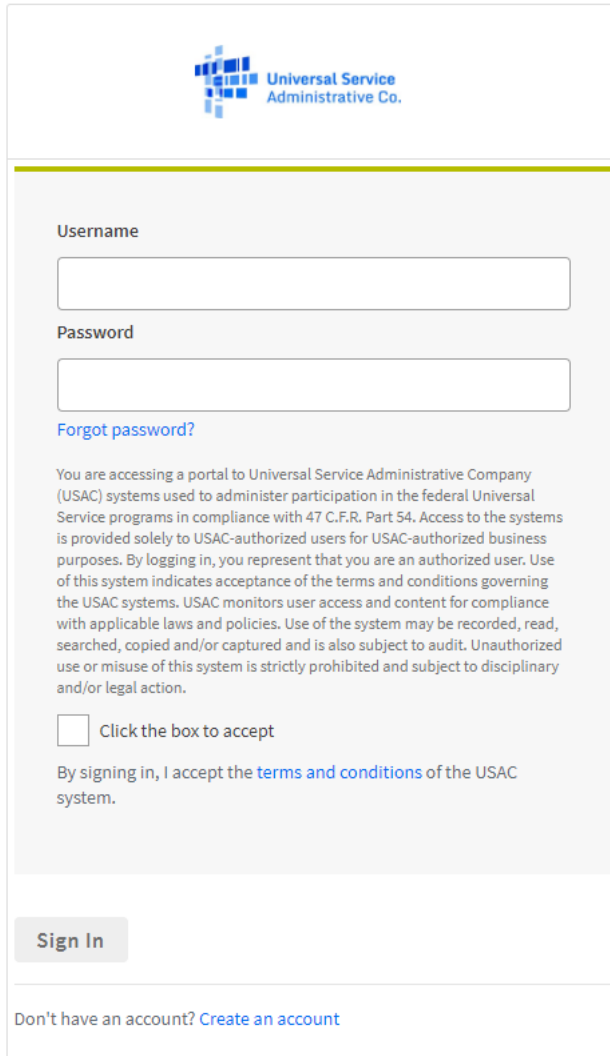
Continue

USAC online systems notification box is the first thing you will see

This announcement discusses the multifactor authentication process.

In most cases, you will need to scroll down to see the “**Continue**” button.

E-File Log In Screen



The screenshot shows the login interface for the Universal Service Administrative Company (USAC). At the top left is the USAC logo. Below it, there are input fields for 'Username' and 'Password'. A link for 'Forgot password?' is located below the password field. A large block of text contains the terms and conditions of use, followed by an unchecked checkbox and the text 'Click the box to accept'. Below this is a statement: 'By signing in, I accept the terms and conditions of the USAC system.' At the bottom left is a 'Sign In' button. At the very bottom, there is a link: 'Don't have an account? Create an account'.

Universal Service Administrative Co.

Username

Password

[Forgot password?](#)

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary and/or legal action.

☐ Click the box to accept

By signing in, I accept the [terms and conditions](#) of the USAC system.

Sign In

Don't have an account? [Create an account](#)

- Enter username and password.
- If you haven't logged in since last year, your password have expired. Click '[Forgot password?](#)' to reset it.
- Review and accept terms and conditions. Click on the box to accept. Click '[Sign In](#)' button at bottom of the paragraph.
- Multifactor authentication will begin.

How to Create a Form

Start a New Form Online

Currently, the 2024 FCC Form 499-A is NOT online in E-File.


It will be available on March 1, 2024.

- **Remember!** All FCC Form 499s must be submitted online.
- USAC's online system, E-File, will display data entry screens, guiding the user through reporting the revenue on the form.
- Only users with E-File access to the 499 Filer ID can complete the form.

Navigate to the 499 Screens

Once logged in to E-File, the new service provider portal will appear. Only systems in which you have authorization to access will appear.

In this example, the user can only access the 498 ID and the 499 Filer ID.



Universal Service
Administrative Co.

Sign Out

bcddca@usac.com

Dashboard

In accordance with the Supply Chain orders, new certifications have been added to the following forms: RHC - FCC Form 463 and the Telecom invoice, E-rate - FCC Form 473, and High Cost & Lifeline - FCC Form 481. Service providers are required to submit these annual certifications. For additional information, visit the [USAC Supply Chain](#) page.

Upcoming Dates

02/01
2023

FCC Form 499-
Q Due

02/02
2023

Webinar:
What's New on
the 2023 FCC
Form 499-A

04/03
2023

2023 FCC Form
499-A Due

[see full calendar](#)

Service Providers

Manage FCC Forms 498 - Provide contact and banking information for entities that receive support from universal service programs, manage authorized users.

Manage FCC Forms 499 - Report revenue on FCC Forms 499, make USF payments, view payment history, download invoice summary and manage users.

Help?

Send us a message
[Click here](#)

Call us
(888) 641-8722

Click to access 499 forms

35

Start the Annual Form

To start the FCC Form 499-A, select ‘[Start Form](#)’ from the row containing the FCC Form 499-A.

NOTE: for purposes of this training, this screen shot is from our test system. The form is not available in E-File yet.

The 2024 form will become available in E-File on March 1.

499 Forms

Payments

Messages (0)

499 Forms

!




You have 3 filing(s) that require attention. Those filings are identified below marked in yellow in the Status column.

×

Sort By

Summary View

Displaying 1 to 10 of 14 records

499 Forms	Receipt Date	Status	View	Action	DCA Approval Date
499-A - 2024 Filing		Not Started		Start Form	
499-Q - February 2024 Filing		USAC Estimate		Revise Certify	
499-Q - November 2023 Filing		USAC Estimate		Revise Certify	

Annual Form - Main Page

Main page for completing of the FCC Form 499-A in E-File. There are two areas of the annual form that require attention.

Registration Information



Revenue Reporting



E-FILE

Company Name: USAC Test Amy

Filer ID: 889993

2024 FCC Form 499-A
(Reporting calendar 2023 revenues)

MAIN PAGE: 2024 FCC FORM 499-A (REPORTING ACTUAL REVENUES FROM CALENDAR YEAR 2023)

Thank you for choosing to electronically file your FCC Form 499-A. Use this E-File system to update your registration information and to report your actual revenues from calendar year 2023. As you enter your data, be sure that you understand the requirements as indicated in the 2024 [FCC Form 499-A Instructions](#).

Update Registration Information

(Pages 1-3 of FCC Form 499-A)

Review and update your registration information, including your company contact names and addresses, carrier type and activities, and jurisdiction. The E-File system has pre-populated this information from your prior FCC Form 499 submissions.

Enter/Update Revenue Information

(Pages 4-8 of FCC Form 499-A)

Enter or update your revenue information for calendar year 2023. If you are submitting a revision, the E-File system has pre-populated revenue information from your last filing.

Submitting the Form

Throughout the data entry process, the E-File system will conduct validations of your data and will advise you of any issues it detects. The "Review and Certify My Filing to USAC" button will be enabled only when any identified issues have been resolved.

Save & Close Form

Review & Certify My Filing to USAC

37

Registration Information Summary

Information reported in registration section

Company identification

Telecommunications services offered

Holding company/affiliates

Customer contact information

Form preparer contact information



USAC billing contact information

List of company officers

States where services are sold

Please review this information is correct when submitting the FCC Form 499-A.

While the information is pre-populated from last year's form, take a moment to review for accuracy.

Service providers can update this information at any time during the year by submitting a revision.

Registration Information Summary

E-FILE

REGISTRATION INFO

- Contributor Identification
- Telecommunications Activities
- Holding Company
- Customer Inquiries
- Preparer Contact
- Future Filing Contact
- Billing Contact
- Agent for Service of Process
- Company Officers
- Filer Jurisdiction
- Registration Summary

DOCUMENTS

- Form 499-A Instructions

Company Name: USAC Test Amy
Filer ID: 889993

2024 FCC Form 499-A
(Reporting calendar 2023 revenues)

REGISTRATION INFORMATION SUMMARY

Below please find all of the registration sections of the FCC Form 499-A, including your company contact names and addresses, carrier type and activities, and jurisdiction. The E-File system has pre-populated this information from your prior submissions. As you review and edit your data, be sure that you understand the requirements as indicated in the 2024 FCC Form 499-A Instructions..

Click [here](#) for more information about how to navigate through this section.

Contributor Information

Edit

Success! This section is complete.

Telecommunication Activities

Edit

Success! This section is complete.

Holding Company

Edit

Success! This section is complete.

2024 FCC Form 499-A Telecommunications Reporting Worksheet (Reporting 2023 Revenues)

APPROVED BY OMB
3060-0855

>>> Please read instructions before completing <<<

Annual Filing -- due April 1, 2024

Block 1: Contributor Identification Information		During the year, filers must refile Blocks 1, 2 and 6 if there are any changes in Lines 104 or 112. See Instructions.	
101	Filer 499 ID (If you don't know your number, contact the administrator at (888) 641-8722. If you are a new filer, write "NEW" in this block and a Filer 499 ID will be assigned to you.)		
102	Legal name of filer		
103	IRS employer identification number	[Enter 9 digit number]	
104	Name filer is doing business as		
105	Telecommunications activities of filer (Select up to 5 boxes that best describe the reporting entity. Enter numbers starting with "1" to show the order of importance -- see instructions.)		
<div><div><input type="checkbox"/> Audio Bridging (teleconferencing) Provider</div><div><input type="checkbox"/> Coaxial Cable</div><div><input type="checkbox"/> Non-Interconnected VoIP</div><div><input type="checkbox"/> Private Service Provider</div><div><input type="checkbox"/> Toll Reseller</div></div> <div><div><input type="checkbox"/> Incumbent LEC</div><div><input type="checkbox"/> Operator Service Provider</div><div><input type="checkbox"/> Satellite Service Provider</div><div><input type="checkbox"/> Wireless Data</div></div> <div><div><input type="checkbox"/> CAP/CLEC</div><div><input type="checkbox"/> Interconnected VoIP</div><div><input type="checkbox"/> Paging</div><div><input type="checkbox"/> Shared-Tenant Service Provider / Building LEC</div><div><input type="checkbox"/> Other Local</div></div> <div><div><input type="checkbox"/> Cellular/PCS/SMR (wireless telephony inc. by resale)</div><div><input type="checkbox"/> Interexchange Carrier (IXC)</div><div><input type="checkbox"/> Payphone Service Provider</div><div><input type="checkbox"/> SMR (dispatch)</div><div><input type="checkbox"/> Other Mobile</div><div><input type="checkbox"/> Other Toll</div></div>			

Use additional sheets if necessary. Each filer must provide all names used for telecommunications activities

PERSONS MAKING WILLFUL FALSE STATEMENTS IN THE WORKSHEET CAN BE PUNISHED BY FINE OR IMPRISONMENT UNDER TITLE 18 OF THE UNITED STATES CODE, 18 U.S.C. § 1001

Registration Information Data Entry

Company Name: USAC Test Amy
Filer ID: 889993

2024 FCC Form 499-A
(Reporting calendar 2023 revenues)

REGISTRATION INFORMATION SUMMARY

Below please find all of the registration sections of the FCC Form 499-A, including your company contact names and addresses, carrier type and activities, and jurisdiction. The E-File system has pre-populated this information from your prior submissions. As you review and edit your data, be sure that you understand the requirements as indicated in the 2024 [FCC Form 499-A Instructions](#).

Click [here](#) for more information about how navigate through this section.

Contributor Information

Edit

Success! This section is complete.

Telecommunication Activities

Edit

Success! This section is complete.

Holding Company

Edit

Success! This section is complete.

E-FILE

REGISTRATION INFO

- Contributor Identification
- Telecommunications Activities
- Holding Company
- Customer Inquiries
- Preparer Contact
- Future Filing Contact
- Billing Contact
- Agent for Service of Process

Company Officers

- Filer Jurisdiction
- Registration Summary

DOCUMENTS

- Form 499-A Instructions

Company Name: USAC Test Amy
Filer ID: 889993

2024 FCC Form 499-A
(Reporting calendar 2023 revenues)

CONTRIBUTOR IDENTIFICATION INFORMATION

In this section, please provide the following identification information.

Show Helpful Hint

Legal Name

IRS Employer Identification Number

Name Filer is Doing Business as (DBA)

Management Company

FCC Registration Numbers

Trade Names

Corporate Headquarters Mailing Address

Do you want to enter foreign address?
☐ Yes
☒ No

PO Box 135

Floor 2

Space 5



Entering Revenue Information

Revenue Reporting Sections

Carrier's Carrier - (Form 499-A Lines 303-315)

Edit

This section is for reporting revenues received from (1) carriers that contributed to the federal universal service fund (USF); OR (2) USAC or state sources for universal service support.

End-User - (Form 499-A Lines 403-417)

Edit

This section is for reporting revenues received from end-users, or carriers that did not contribute to the federal USF, for providing telecommunications or interconnected VoIP services.

Non-Telecommunications - (Form 499-A Lines 418.1-418.3)

Edit

This section is for reporting revenues received for providing non-telecommunications services.

Non-Interconnected VoIP - (Form 499-A Line 418.4)

Edit

This section is for reporting revenues received for providing non-interconnected VoIP services.

Excluded Reseller Revenue - (Form 499-A Line 511)

Edit

This section is for reporting revenues from carriers that did not contribute to USF that you would like to exclude from other contribution bases (e.g., NANPA, TRS, LNP).

Uncollectible Revenue or Bad Debt - (Form 499-A Lines 421-422)

Edit

This section is for reporting any uncollectible revenue or bad debt.

Regional Percentages - (Form 499-A Lines 503-510)

Edit

This section is required for carriers and providers of interconnected VoIP with revenue to indicate regional billing data.

Certifying Officer Information

Edit

This section you will need to fill out the filer's Certifying officer information.

Save & Close Form

Go To Main Page

Company Name: USAC Test Amy
Filer ID: 889993

2019 FCC Form 499-A
(Reporting calendar 2018 revenues)

CARRIER'S CARRIER REVENUE

In this section, report: (1) revenues from telecommunications services sold to other carriers; and (2) revenue received from USAC or state sources for universal service support.

For questions below regarding revenue *"from carriers that contribute to USF"*, the carrier's customer must (1) incorporate the purchased telecommunications services into its own telecommunications offerings and (2) be reasonably expected to contribute to the federal universal service support mechanisms based on revenues from such offerings when provided to end users. [FCC Form 499-A Instructions](#).

Fixed Local Services

Did you receive any revenues for providing **fixed local** service for resale - *from carriers that contribute to USF (see above)?* YES - [Click here](#)
NO - Continue to next question

Per-minute charges for originating and terminating calls

Did you receive any revenues from carriers for the **origination or termination of calls**? YES - [Click here](#)
NO - Continue to next question

Private Line & Business Data Services

Did you receive any revenues for providing **private line and business data** service for resale - *from carriers that contribute to USF (see above)?* YES - [Click here](#)
NO - Continue to next question

Payphone Services

Did you receive any **payphone compensation** from long distance carriers? YES - [Click here](#)
NO - Continue to next question

Other Local Telecommunication Services

Did you receive any revenues for providing **other local telecommunication services** for resale - *from carriers that contribute to USF (see above)?* YES - [Click here](#)
NO - Continue to next question

Universal Service Support Funding

Did you receive any **universal service funding** from either state sources or from USAC for high cost or low income support? YES - [Click here](#)
NO - Continue to next question

Mobile Services (i.e., wireless telephony, paging, messaging, and other mobile services)

Did you receive any revenues for providing: 1) **mobile** service for resale - *from carriers that contribute to USF (see above)*; OR 2) other carriers with **roaming** service for its customers - *from carriers that contribute to USF (see above)*? YES - [Click here](#)
NO - Continue to next question

Long Distance Services

Did you receive any revenues for providing **any long distance services** (i.e., operator assisted calls, ordinary long distance, private line, satellite, other long distance) for resale - *from carriers that contribute to USF (see above)*? YES - [Click here](#)
NO - Continue to next question

[Save & Return to Summary](#)[Save & Continue](#)[Expand All](#)[Save & Close](#)

Revenue Data Entry

Placed side by side, you'll see that the online data entry screen does not look like the paper form.

2019 FCC Form 499-A Telecommunications Reporting Worksheet (Reporting 2018 Revenues)					Page 4
Block 3: Carrier's Carrier Revenue Information					
301	Filer 499 ID [from Line 101]				
302	Legal name of filer [from Line 102]				
Report billed revenues for January 1 through December 31, 2018. Do not report any negative numbers. Dollar amounts may be rounded to the nearest thousand dollars. However, report all amounts as whole dollars.		Total Revenues (a)	If breakouts are not book amounts, enter whole percentage estimates Interstate (b) International (c)	Breakouts	
See instructions regarding percent interstate and international.				Interstate Revenues (d)	International Revenues (e)
Revenues from Services Provided for Resale as Telecommunications by Other Contributors to Federal Universal Service Support Mechanisms					
Fixed local service Monthly service, local calling, connection charges, vertical features, and other local exchange service including subscriber line and					
303.1	PICC charges to IXCs Provided as unbundled network elements (UNEs)				
303.2	Provided under other arrangements				
Per-minute charges for originating or terminating calls					
304.1	Provided under state or federal access tariff				
304.2	Provided as unbundled network elements or other contract arrangement				

Upon opening a revenue section, the data entry boxes will not appear.

Click the 'Expand All' selection at the bottom of the screen in order for all data entry fields to be displayed.

Revenue Data Entry

E-FILE

Company Name: USAC Test Amy

2019 FCC Form 499-A

File ID: 889993

(Reporting calendar 2018 revenues)

CARRIER'S CARRIER REVENUE

In this section, report: (1) revenues from telecommunications services sold to other carriers; and (2) revenue received from USAC or state sources for universal service support.

For questions below regarding revenue *"from carriers that contribute to USF"*, the carrier's customer must (1) incorporate the purchased telecommunications services into its own telecommunications offerings and (2) be reasonably expected to contribute to the federal universal service support mechanisms based on revenues from such offerings when provided to end users. [FCC Form 499-A Instructions](#).

Fixed Local Services

Did you receive any revenues for providing **fixed local** service for resale - *from carriers that contribute to USF (see above)?*

YES - [Click here](#)

NO - Continue to next question

Please report revenues for monthly service, local calling, connection charges, vertical features, and other local exchange service including subscriber line and PICC charges to IXCs. Please report your revenues from all local exchange services that should be included with the basic local service revenues. Break out these revenues as follows:

Show Helpful Hint

303.1

Provided to carriers as unbundled network elements (UNEs)

\$

0.00

0.00

%

0.00

%

\$

0.00

\$

0.00

Total Revenues

Interstate %

International %

Interstate Revenues

International Revenues

303.2

Services provided to carriers under tariffs or arrangements other than unbundled network elements (for example, resale). Line 303.2 should also include Presubscribed Interexchange Carrier Charge (PICC) charges levied on carriers.

\$

0.00

0.00

%

0.00

%

\$

0.00

\$

0.00

Total Revenues

Interstate %

International %

Interstate Revenues

International Revenues

Per-minute charges for originating and terminating calls

Did you receive any revenues from carriers for the **origination or termination of calls**?

YES - [Click here](#)

NO - Continue to next question

Please report revenues for per-minute charges for originating and terminating calls, including charges related to originating or terminating VoIP-PSTN traffic (voice over Internet protocol to public switched telephone network traffic).

Show Helpful Hint

304.1

Provided under state or federal access tariff

\$

0.00

0.00

%

0.00

%

\$

0.00

\$

0.00

Total Revenues

Interstate %

International %

Interstate Revenues

International Revenues

304.2

Provided as unbundled network elements or other contract arrangement

\$

0.00

0.00

%

0.00

%

\$

0.00

\$

0.00

Total Revenues

Interstate %

International %

Interstate Revenues

International Revenues

Private Line & Business Data Services

Did you receive any revenues for providing **private line and business data** service for resale - *from carriers that contribute to USF (see above)?*

YES - [Click here](#)

NO - Continue to next question

Please report revenues from all private line and business data services. Break out those revenues as follows:

Show Helpful Hint

305.1

Telecommunications - Provided to other contributors for resale as telecommunications

\$

0.00

0.00

%

0.00

%

\$

0.00

\$

0.00

After clicking the ‘Expand All’, every section is expanded and the corresponding line numbers that reference the paper form are displayed.

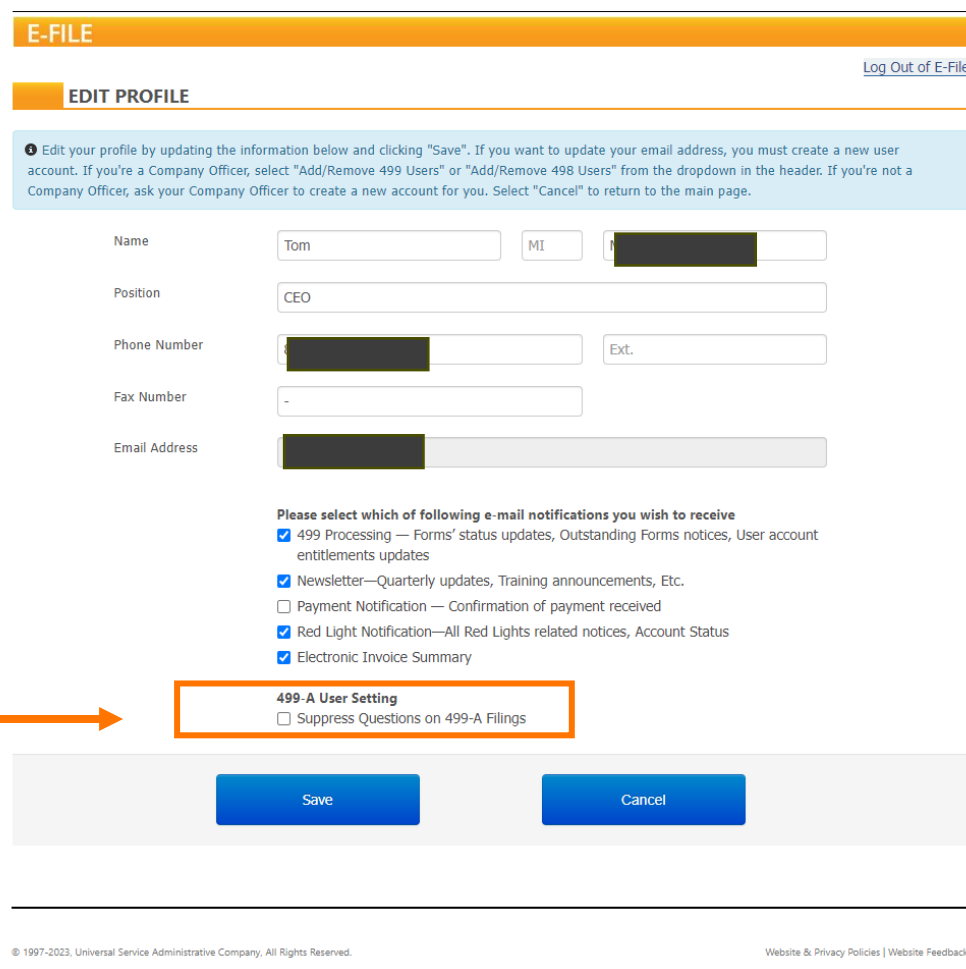
There’s a lot of lines, so use the scroll bar on the right-hand side of the screen to scroll through all of the data entry questions.

44

Suppress Data Entry Questions

Suppress Annual Form Data Entry Questions

Users have the option to 'turn off' the guided questions in the annual form data entry program, leaving just the revenue line numbers for data entry.



E-FILE [Log Out of E-File](#)

EDIT PROFILE

① Edit your profile by updating the information below and clicking "Save". If you want to update your email address, you must create a new user account. If you're a Company Officer, select "Add/Remove 499 Users" or "Add/Remove 498 Users" from the dropdown in the header. If you're not a Company Officer, ask your Company Officer to create a new account for you. Select "Cancel" to return to the main page.

Name

Position

Phone Number

Fax Number

Email Address

Please select which of following e-mail notifications you wish to receive

- ☒ 499 Processing — Forms' status updates, Outstanding Forms notices, User account entitlements updates
- ☒ Newsletter—Quarterly updates, Training announcements, Etc.
- ☐ Payment Notification — Confirmation of payment received
- ☒ Red Light Notification—All Red Lights related notices, Account Status
- ☒ Electronic Invoice Summary

499-A User Setting

☐ Suppress Questions on 499-A Filings

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Data Entry Navigation

Data Entry Navigation

Did you receive any revenues for providing **wireless mobile services** (i.e., cellular, paging, messaging, SMS, and other mobile services)?

YES - [Click here](#)
NO - Continue to next question

Long Distance Services

Did you receive any revenues for providing **long distance services** (i.e., prepaid calling card, operator assisted calls, ordinary long distance, interconnected VoIP, private line, satellite, audio bridging, or other long distance)?

YES - [Click here](#)
NO - Continue to next question

[Save & Return to Summary](#) [Save & Continue](#) [Expand All](#) [Save & Close](#)

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At the bottom of each data entry page, there is a line of buttons for navigating through the data entry process.

[Save & Return to Summary](#)

Saves form, **return** to summary page

[Save & Continue](#)

Saves form, **advances** to next section

[Save & Close](#)

Saves form, **EXITS** form data entry

Questions?

Certify & Submit

Complete the FCC Form 499-A Form

Certify and Submit the Annual Form

Once the data entry is complete on the FCC Form 499-A, **USAC does not consider it submitted until a Company Officer electronically signs (certify) and submits the form.**

E-File preparers cannot submit the FCC Form 499-A, only a Company Officer can.

E-File gives the officer two methods for certifying forms.

1.

Company Name: USAC Test Amy
Filer ID: 889993

2024 FCC Form 499-A
(Reporting calendar 2023 revenues)

MAIN PAGE: 2024 FCC FORM 499-A (REPORTING ACTUAL REVENUES FROM CALENDAR YEAR 2023)

Thank you for choosing to electronically file your FCC Form 499-A. Use this E-File system to enter or update your registration information and to report your actual revenues from calendar year 2023. As you enter your data, be sure that you understand the requirements as indicated in the 2024 FCC Form 499-A Instructions.

Update Registration Information
(Pages 1-3 of FCC Form 499-A)

Review and update your registration information, including your company contact names and addresses, carrier type and activities. The E-File system has pre-populated this information from your previous 499 submissions.

Enter/Update Revenue Information
(Pages 4-6 of FCC Form 499-A)

Enter or update your revenue information for calendar year 2023. If you are submitting a revision, the E-File system has pre-populated information from your last filing.

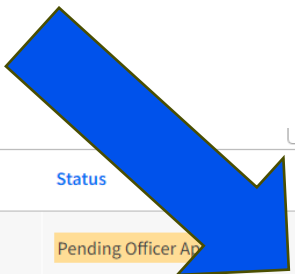
Submitting the Form

Throughout the data entry process, the E-File system will conduct validations of your data and will alert you of any issues it detects. The "Review and Certify My Filing to USAC" button will be enabled only when any identified issues have been resolved.

Save & Close Form

Review & Certify My Filing to USAC

2.



Account #	Company Name	Form	Status	View	Action
889993	USAC Test Amy	499-Q - November 2020 Filing - Rev 3	Pending Officer Approval		Revise Certify
	Communications, LLC	499-A - 2022 Filing - Rev 1	Pending Officer Approval		Revise Certify
889994	USAC Test Joseph	499-A - 2022 Filing	Pending Officer Approval		Revise Certify
889993	USAC Test Amy	499-A - 2020 Filing - Rev 2	Pending Officer Approval		Revise Certify

51

What Happens Next

USAC Review of the FCC Form 499-A Form

2024 FCC Form 499-A Review


- USAC runs a program to review for discrepancies and revenue fluctuations.
- If the Form is not auto-approved, a 499 analyst will review the form.

Analysts are assigned a 499 Filer ID number range to review.

~ 6,000 active 499 Filer IDs and 5 analysts

- Review may take 3 months to complete, dependent upon volume.
- If the analyst finds an issue, we'll send the preparer an E-File message outlining what the issue is. Please respond to the message within the Message Portal.
- If the analyst requests copies of supporting documentation, please email to 'Form499@usac.org'.
- If after 90 days the issue goes unresolved, the account will be flagged as non-compliant.

Common Form Statuses

499 Forms	Receipt Date	Status	View	Action	DCA Approval Date
499-A - 2024 Filing		Incomplete		Continue Certify	

- **Certified**
 - Waiting for USAC to review – no action required by filer
- **DCA Approved**
 - Form has been approved by USAC – no action required by filer
- **Issue - Response Required**
 - An issue email was sent to the preparer that requires attention. Reply to the message within the Message Portal. If supporting material is requested, email to 'Form499@usac.org'.

Questions?

2024 Annual Training Announcements

Wednesday, February 7 – **What's New on the 2024 FCC Form 499-A**

- Review of the changes to this year's form

Monday, February 12 – **2024 FCC Form 499-A: Getting Started**

- General session reviewing the revenue collected and how to complete the form

Wednesday, February 14 - **2024 FCC Form 499-A: VoIP Providers and Resellers**

- Review of specific line number reporting for VoIP service providers

Thursday, March 7 – **Office Hours: Access to E-File**

- Review how to access and navigate E-File, set up new users, user roles.

All webinars are 2 p.m. – 3 p.m ET. [Register here](#).

Webinars will be recorded and posted on the same website where you register.

Weekly Webinars - Questions about the Annual Form

*** New * this year. Scheduled opportunities to ask questions about completing the 2024 FCC Form 499-A**

Friday, March 8 – **Annual Form Training: Registration Questions**

- Review of information found in Block 1 and Block 2.

Friday, March 15 – **Annual Form Training: Wholesale Revenue (Block 3)**

- Review of line numbers reporting revenue in Block 3.

Friday, March 22 - **Annual Form Training: End User Revenue (Block 4)**

- Review of line numbers reporting revenue in Block 3.

Friday, March 29 – **Annual Form Training: Regional Percentages and Certification**

- Review of information reported in Block 5.

All webinars are 2 p.m. – 3 p.m ET. [Register here](#).

Webinars will be recorded and posted on the same website where you register.

Contacting USAC

E-File Message Portal

Send a message to the Service Provider team directly through the new Message Portal in E-File.

499 Forms

Payments

Messages (0)

Inbox

Archive

Displaying 0 of 0 records

+ Compose

No new messages.

Show 10 records

New Message

Company

USAC Test Amy

Email

example@company.com

☐ Notify all contacts

Category

--Select A Category--

--Select A Category--

499-A

499-Q

Billing

Credit Balance Refunds

Deactivation

Payments

Red Light

True-Up

Other

Cancel

Send

Customer Service Center (CSC)

Contributors/Service Providers



Call us at (888) 641-8722

Monday – Friday 9 a.m. to 5 p.m. ET



Email: CustomerSupport@usac.org

- Include your 499 Filer ID in your email

