

Contributor Office Hours

What's New on the 2024 FCC Form 499-A
February 7, 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.
- 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.

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Agenda

- Introduction
- Webinar Format
- 2024 Annual Form Updates
- Questions
- Annual Form Training Schedule
- Assistance Resources

“Office Hours” Webinar Format

- Office Hours will be held monthly.
- Brief presentation of a common topic at the beginning
- Open the floor to questions from attendees
 - Attendees type their question in the ‘Questions’ box in the GoToWebinar panel
 - USAC staff will repeat the question so everyone can hear
 - USAC staff will answer the question, keeping identify of the asker private
 - If question contains specific company information, USAC staff will follow-up with an email, keeping the question private.

Updates to the 2024 FCC Form 499-A

Summary of Clarifications for 2024 Form

Clarifications to the 2024 FCC Form 499-A Instructions ([DA 23-1024](#))

- Table 2 on page 12 is updated to clarify that carriers that hold international section 214 authorizations must designate a Washington, D.C.-based agent for service of process who is a U.S. citizen or lawful permanent resident.
- Page 16 is updated to add the reference to the Broadband Data Collection (BDC) system and indicate that entities required to submit information to the BDC system should use the same single name that is used in the entity information associated with the FCC Form 477 subscription data and/or the biannual submissions of BDC availability.
- Page 18 is updated to clarify that carriers that hold international section 214 authorizations must designate a Washington, D.C.-based agent for service of process who is a U.S. citizen or lawful permanent resident.

Summary of Clarifications for 2024 Form

Clarifications to the 2024 FCC Form 499-A Instructions ([DA 23-1024](#))

- Page 28 is updated to clarify that line 305.2 should not include revenue from interconnected VoIP service provided by the Filer and resold as interconnected VoIP service by reseller customers of the Filer. However, revenue from private line/business data service provided by the Filer and resold as interconnected VoIP service by reseller customers of the Filer should be included.
- Page 32 is updated to clarify that Line 311 should include long distance using interconnected VoIP provided to contributing resellers.
- Page 48 is updated to provide examples of exemptions from paying certain regulatory fees.
- Page 49 is updated to clarify that line 514(a) should be used for contributions funding IP Relay and Video Relay Service (VRS) in addition to IP Captioned Telephone Service (CTS).

Detailed Look at Clarifications

Page 12 – Table 2: DC Agent for Service

Table 2 on page 12 is updated to clarify that carriers that hold international section 214 authorizations must designate a Washington, D.C.-based agent for service of process who is a U.S. citizen or lawful permanent resident.

The highlighted text was added.

Table 2: Filing Schedule for One-Time Requirements

What to file	When to file	Where to file
<p>New telecommunications carriers and other telecommunications providers must <u>register</u> with the Commission when they begin to provide service.³⁰ Registration with the Commission includes obtaining an FCC registration number ("FRN") from the Commission registration system ("CORES") and obtaining a Filer ID from USAC's E-File system. If a new filer had already started providing telecommunications services prior to its registration with the FCC and obtaining a 499 Filer ID from USAC, it must file FCC Forms 499-A for all prior applicable years in which it provided telecommunications services and/or VoIP.</p> <p>New carriers and VoIP providers (including interconnected and non-interconnected) must identify an agent for service of process within the District of Columbia. Although alternate agents may be included in the filing, a resident D.C. agent must be designated. Carriers that hold international section 214 authorizations must designate a U.S. citizen or U.S. lawful permanent resident as their agent for service of process.</p>	<p>Upon beginning to provide service, but no later than 30 days after beginning to provide service.</p>	<p><u>FCC (to obtain an FRN)</u> https://apps.fcc.gov/cores/userLogin.do</p> <p><u>USAC (to obtain a 499 Filer ID)</u> https://www.usac.org/service-providers/contributing-to-the-usf/register-for-a-499-id/</p> <p>Such information is provided at Page 2, Block 2 of the FCC Form 499-A.</p>

Page 18: DC Agent for Service

Page 18 is updated to clarify that carriers that hold international section 214 authorizations must designate a Washington, D.C.-based agent for service of process who is a U.S. citizen or lawful permanent resident.

The highlighted text was added.

2. BLOCK 2-B: AGENT FOR SERVICE OF PROCESS

Section 413 of the Act requires each common carrier “to designate in writing an agent in the District of Columbia” upon whom all notices, process, orders, and decisions made by the Commission may be served on behalf of that carrier in any proceeding pending before the Commission. The Commission has also extended this requirement to interconnected and non-interconnected VoIP providers.⁴³ Carriers that hold international section 214 authorizations must designate a U.S. citizen or U.S. lawful permanent resident as their agent for service of process.⁴⁴

⁴³ 47 U.S.C. § 413; *see* 47 CFR § 1.47(h) (interconnected VoIP providers); *Contributions to the Telecommunications Relay Services Fund*, CG Docket No. 11-47, Report and Order, 26 FCC Rcd 14352, 14542, para. 21 (2011) (non-interconnected VoIP providers).

⁴⁴ 47 U.S.C. § 413; *see* 47 CFR § 1.47(h); *Process Reform for Executive Branch Review of Certain FCC Applications and Petitions Involving Foreign Ownership*, Report and Order, 35 FCC Rcd 10927, 10951-52, paras. 68-69, (2020) (*Executive Branch Process Reform Report and Order*).

Page 16: Line 106 Affiliated Filers/Holding Company Info

The highlighted language is updated to add the reference to the Broadband Data Collection (BDC) system and indicate that entities required to submit information to the BDC system should use the same single name that is used in the entity information associated with the FCC Form 477 subscription data and/or the biannual submissions of BDC availability.

Line 106

Affiliated Filers/ Holding Company Information

Enter a common identifier for all affiliated filers (the “Affiliated Filers Name”). This is typically the name of the filer’s holding company or controlling entity, if any. Amongst a large group of affiliates, this may be the name of the predominant commonly owned or controlled entity. All reporting affiliates or commonly owned entities should have the same Affiliated Filers Name and IRS employer identification number appearing on Line 106.1 and 106.2 respectively. For those entities also required to submit information to the Broadband Data Collection (BDC) system, use the same single name that is used on the Entity Information associated with the biannual submissions of BDC availability and/or FCC Form 477 subscription data to indicate common ownership or control.⁴⁰

- Unless otherwise specifically provided, an affiliate is a “person that (directly or indirectly) owns or controls, is owned or controlled by, or is under common ownership or control with, another person.”⁴¹ For this purpose, the term ‘owns’ means “to own an equity interest (or the equivalent thereof) of more than 10 percent.”⁴²
- If the filer has no affiliates, check the appropriate box on Line 106.

Page 28: Line 305.2 Wholesale VoIP Revenue

Revenue reported on Line 305.2 should only be the sale of circuits used for VoIP services to resellers. The language highlighted below was added to clarify the service revenues reported on this line. Another way to think of this is to look at it's 'sister' line number, Line 406 – private lines and special access lines.

Line 305.2

Revenues for service provided to contributing resellers for resale as interconnected VoIP. Revenue should not include interconnected VoIP service provided by the Filer and resold as interconnected VoIP service by reseller customers of the Filer; however, it should include private line/business data service provided by the Filer and resold as interconnected VoIP service by reseller customers of the Filer.

Page 32: Line 311 Wholesale VoIP Long Distance

- Page 32 is updated to clarify that Line 311 should include long distance using interconnected VoIP provided to contributing resellers.

2023 FCC Form 499-A instructions

Ordinary long distance revenues should be reported as follows:

Line 311	Ordinary long distance provided to contributing resellers.
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Was replaced with this text from the 2024 FCC Form 499-A instructions

Ordinary long distance revenues should be reported as follows:

Line 311	Ordinary long distance and long distance using interconnected VoIP provided to contributing resellers.
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Page 48: Line 604 - Regulatory Fee Exemptions

Page 48 is updated to provide examples of exemptions from paying certain regulatory fees.

Text highlighted was added in the 2024 FCC Form 499-A instructions.

Note that such entities are not exempt from universal service, TRS, LNP, or NANPA contributions unless they qualify under some other exemption (i.e., Interstate service providers that have mobile service or satellite service revenues but that do not have interstate local revenues or interstate toll revenues are exempt from payment of ITSP fees. Interstate service providers that provide service to only other carriers are also exempt from ITSP regulatory fees. Carriers whose total regulatory fee payment obligation is \$1,000 or less are also exempt).

Page 49: Table 4 – Contribution Base TRS

Page 49 is updated to clarify that line 514(a) should be used for contributions funding IP Relay and Video Relay Service (VRS) in addition to IP Captioned Telephone Service (CTS).

The text highlighted is what was added in the 2024 FCC Form 499-A instructions.

TRS (Filers with end-user revenues must pay a minimum of \$25)	Line 514(a) for contributions funding IP CTS, ⁹³ IP Relay, ⁹⁴ and VRS. ⁹⁵ Line 514(b) for contributions funding all other forms of TRS
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Questions?

Additional Training for the Annual Form

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.

Contact 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

USAC 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 in your email
 - 498 ID/Service Provider ID Number (SPIN)
 - 499 Filer ID



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