



FILED
10-19-16
04:59 PM

Lifeline Program Update

Thursday, October 13, 2016



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, refresh the webinar

About the Lifeline Program Webinar

- Discusses general issues with the Lifeline Program, including:
 - Impacts and implementation considerations of the Modernization Order
 - National Lifeline Accountability Database (NLAD)
- To register for each session, please visit www.usac.org/li and click on “Trainings & Outreach” then “Lifeline Program Update Webinars”

Agenda

Announcements

Benefit Port Freeze

1. Overview
2. Benefit Service Types in NLAD
3. Implications
4. Transactions
5. Exceptions

Announcements

- FCC Public Notice ([DA 16-118](#)) released on September 30, 2016
 - Guidance on LBP Designations and Minimum Service Standards
- FCC Public Notice ([DA 16-1133](#)) released on October 3, 2016
 - Announcement of OMB approval and publication in the Federal Register of the Modernization rule changes and effective dates
- NEW Modernization webpages on USAC website
 - Please visit the [Program Requirements](#) page for new content

Benefit Port Freeze

Voice

60 day Port Freeze for voice

Broadband

12 month Port Freeze for broadband

Bundle

Port Freeze will be based on the service type that meets the minimum service standards

The Port Freeze will begin on the subscriber's service initiation date

After the Port Freeze ends the subscriber is able to transfer their benefit to a different provider

Lifeline Benefits Service Types

“Service type” is now a required field in NLAD

There are 5 service types/plans available to eligible Lifeline subscribers:

- Voice (*default*)
- Broadband
- Bundled – Voice (*broadband does not meet the minimum service standards*)
- Bundled – Broadband (*voice does not meet the minimum service standards*)
- Bundled – Voice and Broadband (*both voice and broadband meet the minimum service standards*)

Port Freeze Implications

Port Freezes will be based on the type of service plan the subscriber is enrolled with:

- **Voice** and **Bundled - Voice** subscribers will be subject to a Port Freeze of 60 days
- **Broadband, Bundled - Broadband**, and **Bundled - Voice and Broadband** subscribers will be subject to a Port Freeze of 12 months

For API specifications that include the updated service type field requirements and the Port Freeze exception request submission, please view the API Specification document currently available in the [NLAD Pre-Production environment](#).

Questions?

Please enter your questions using the “Questions” box

Enroll/Transfer Transactions within the Port Freeze

1. When attempting to enroll or transfer a subscriber in NLAD with ***Voice*** or ***Bundled - Voice*** service, the NLAD user will receive the following message:
 - Error Message: **serviceInitializationDate : Enrolls/Transfers within 60 days of the previous service-initiation date are prohibited., Date eligible for enroll/transfer: mm/dd/yyyy**
2. When attempting to enroll or transfer a subscriber in NLAD with ***Broadband, Bundled - Broadband, or Bundled - Voice and Broadband,*** the NLAD user will receive the following message:
 - Error Message: **serviceInitializationDate : Enrolls/Transfers within 12 months of the previous service-initiation date are prohibited., Date eligible for enroll/transfer: mm/dd/yyyy**

Update Transactions

A subscriber's service initiation date cannot be updated once they have enrolled with a service provider, unless there is a change to service type.

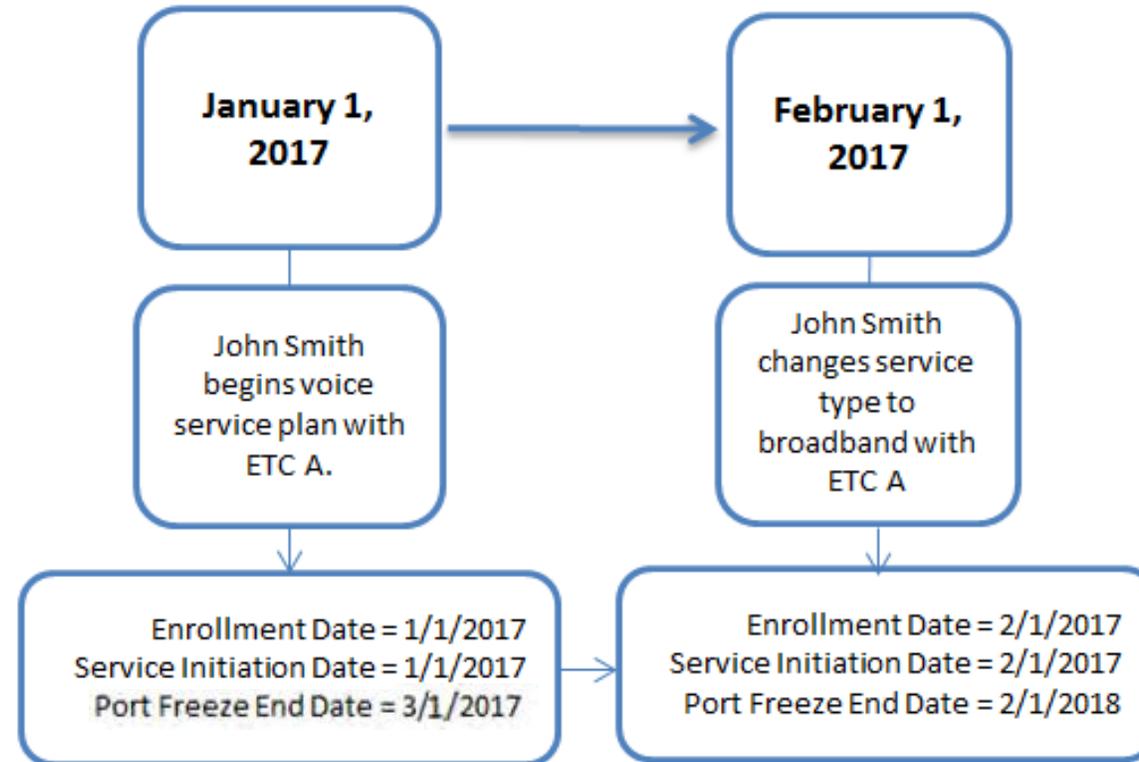
The following error message will be displayed if no changes are made to the service type and the service initiation date is updated:

svcinitdate: Service initialization date cannot be updated if no changes are made to the service type. The service initialization date must be mm/dd/yyyy.

The Port Freeze is **based on the service initiation date.**

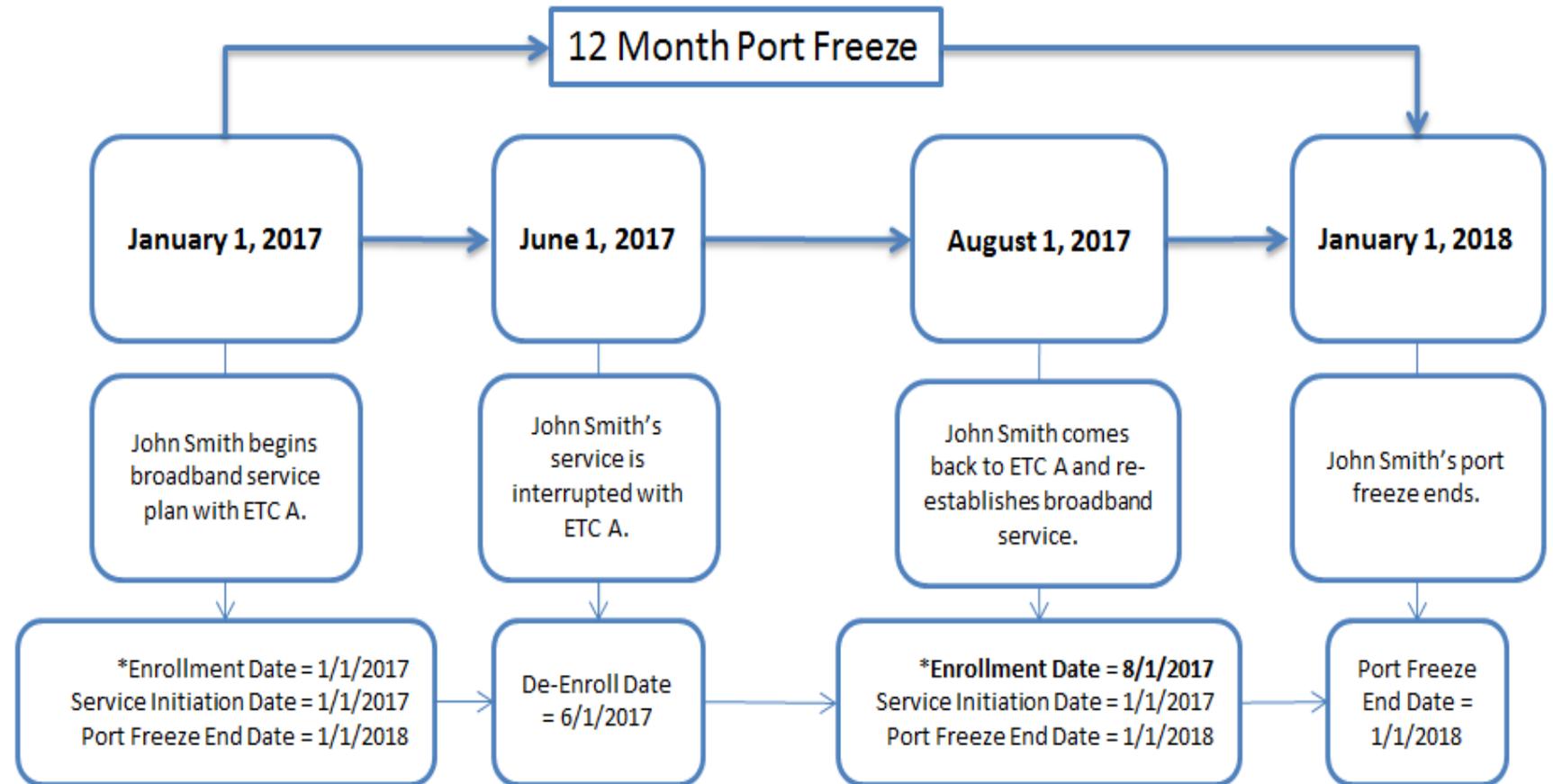
Update Transactions

If a subscriber's service type is updated during (or after) the Port Freeze, their service initiation date can be updated.



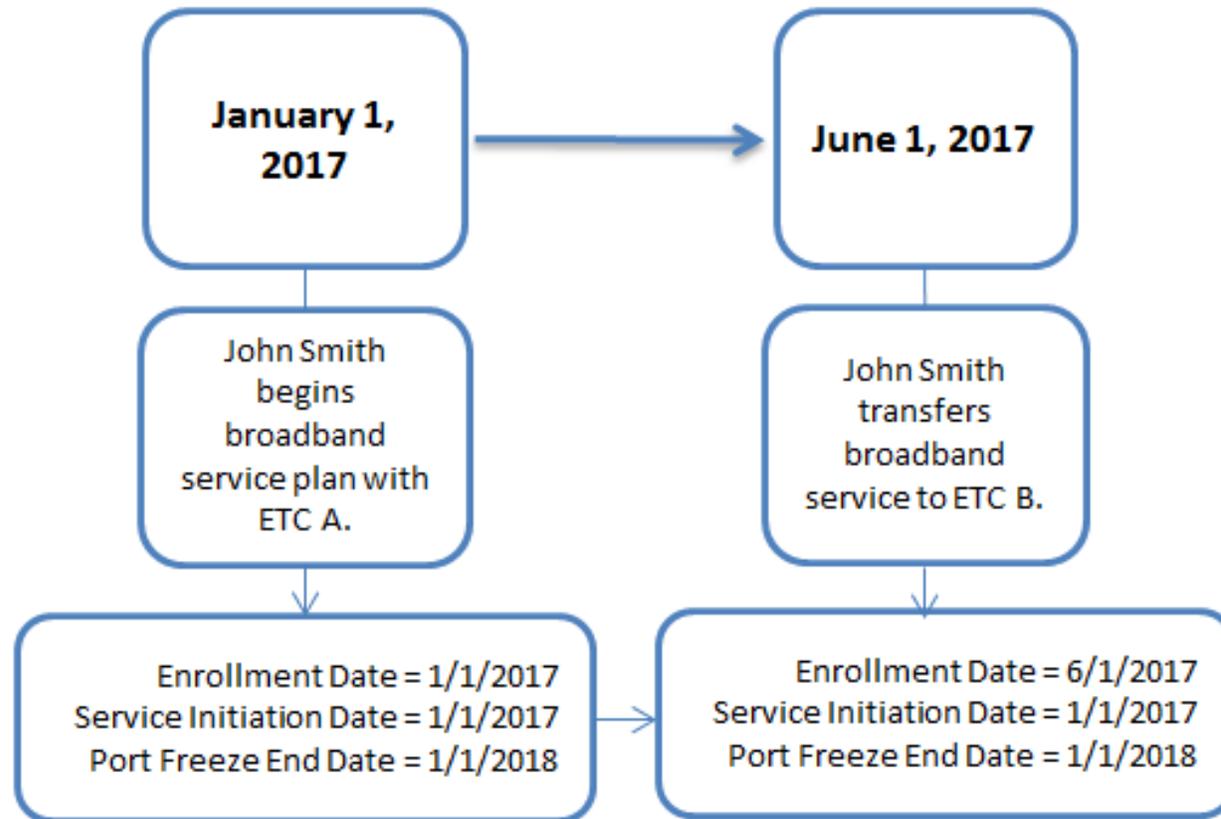
Unique Enroll Scenarios within the Port Freeze

Subscriber interrupts service within the Port Freeze but returns to the same provider with the same service type:



Unique Transfer Scenarios within the Port Freeze

If the subscriber transfers their service to another provider within the Port Freeze, the service initiation date and the Port Freeze end date **do not** change.



***SVCINITDATE_DOES_NOT_MATCH:**
The service initialization date must be mm/dd/yyyy.

Questions?

Please enter your questions using the “Questions” box

Port Freeze Exception – Sharing Eligibility Information

Option One

1. New carrier submits Port Freeze exception request in NLAD
2. USAC requests eligibility documents and confirms remaining Port Freeze period from previous carrier
3. USAC approves the Port Freeze exception ticket in NLAD*
4. New carrier retains the remainder of subscriber's Port Freeze period

***USAC will only share eligibility documents with the new carrier upon request**

Port Freeze Exception – Sharing Eligibility Information

Option Two

1. If customer and new carrier request, the new carrier can perform an eligibility check
2. New carrier submits Port Freeze exception request in NLAD
3. New carrier notates the subscriber's consent to the eligibility verification in the exception request in NLAD and performs the check
 - Service providers must retain eligibility documentation in compliance with the [document retention policy](#)
4. New carrier retains the remainder of subscriber's Port Freeze period

Exceptions to Port Freeze Rules

1. Subscriber moves their residential address
2. Provider ceases operations or otherwise fails to provide service
3. Provider has imposed late fees for non payment greater than or equal to the monthly end-user charge for the supported service
4. Provider is found to be in violation of the Commission's rules during the 12 month period and the subscriber is impacted by such violation

Port Freeze Exception – Residential Address Change

A service provider can submit a residential address change exception request with one of the following codes:

CODE	DESCRIPTION	RESTRICTION
R1	Reviewed unexpired driver's license	Must be unexpired and display current address
R2	Reviewed utility bill	Must be issued within the last 60 days and display current address
R3	Reviewed current income statement from an employer, paycheck stub, or W-2	Must be issued within the last 60 days or within 2 years for an annual form (W-2) and must display current address
R4	Reviewed prior year's state, federal or Tribal tax return	Must be from the current or prior year and display current address
R5	Reviewed current mortgage or lease statement	Must be issued within the last 60 days and display current address
R6	Reviewed unexpired government, state, or Tribal issued ID	Must be unexpired and display current address
R7	Reviewed government assistance program documents	Must be issued within the last 60 days and display current address
R8	Reviewed statement of benefits from a qualifying program which contains subscriber's name	Must be issued within the last 60 days and display current address
R9	Reviewed retirement/pension statement of benefits	Must be issued within the last 60 days and display current address
R10	Reviewed an unemployment/workers' compensation statement of benefits	Must be issued within the last 60 days and display current address

Port Freeze Exceptions – Other Exceptions

Additional exception codes that can be used in the exception management process:

CODE	DESCRIPTION
S1	The subscriber's provider has ceased operations or otherwise failed to provide service
L1	The subscriber's provider has imposed late fees > or = the monthly service charge
V1	The subscriber's provider has violated FCC rules and the subscriber has been impacted by the violation
P1	Service provider is updating the subscriber's SAC

For API specifications that include the updated service type field requirements and the Port Freeze exception request submission, please view the API Specification document currently available in the NLAD Pre-Production environment.

USAC will evaluate these exception requests on a case by case basis.

Questions?

Please enter your questions using the “Questions” box

Lifeline Program Webinar

- Thank you for joining us on today's webinar
- Sign up for the Lifeline Program emails for updates and upcoming events
 - Go to www.usac.org and click “subscribe” in the upper-right corner
- For questions about NLAD, email NLADsupport@usac.org or call (877) 524-1325

