



# State of Texas Lifeline Procedure Changes to Encompass the FCC Lifeline Reform and Modernization Order

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- **AGENDA**

- US Telecom Waiver.
- Discussions with FCC on Texas Procedures.
- High Level Overview.
- Monthly File to LIDA.
- Lifeline Customers as of June 1, 2012.
- Duplicative Effort.
- Lifeline Customers after June 1, 2012.
- Recertification.
- Process changes for companies with similar business model as Assurance Wireless and Safelink.
- National Database

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- **High Level Changes Resulting From FCC Order**
  - Most ETCs will see minor changes in the way Lifeline works today.
  - ETCs with the business model similar to Assurance Wireless and Safelink Wireless will have significant changes to their process starting in September 2012.

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- **Monthly file to LIDA**

- Effective with the June file from the ETCs, P.O. Boxes for service address will result in the record being rejected.
- ETCs monthly file to LIDA will change starting July 2012. 4 added fields to file (Date Of Birth, Billing Address, Billing City, Billing Zip). Instructions will be sent to ETCs by May 24<sup>th</sup>.
- ETCs with the business model similar to Assurance Wireless and Safelink will have changes starting with the September 2012 file.
  - 2 files will be sent to LIDA
    - A file from the non Lifeline Company (Tracfone, Virgin Mobile, etc...)
    - A file from the Lifeline Company (Assurance Wireless, Safelink, etc...)

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- **Existing Lifeline Customers as of June 1, 2012**
  - The May Output File from LIDA will be your Lifeline Customers as of June 1.
  - Certification forms are not required from your existing Lifeline customers.

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- **Duplicative effort of Lifeline Customers as of June 1, 2012 – Multiple Lifeline Recipients in a Residence**
  - Sort by address and number of matches.
  - Letter and USAC Household Worksheet sent to each identified Lifeline match at residence.
  - 30 days to respond with completed Household Worksheet.
  - No response will result in de-enrollment.
  - ETCs will be notified of de-enrollees.

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- **Duplicative effort of Lifeline Customers as of June 1, 2012 – Multiple Lifeline Matches for 1 Recipient at a Residence**
  - Sort by address and number of matches.
  - Letter and USAC Household Worksheet sent to Lifeline match at residence.
  - 30 days to respond with completed Household Worksheet to select preferred line.
  - No response will result in de-enrollment.
  - ETCs will be notified of de-enrollees.

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- **Newly identified Lifeline Match After June 1, 2012**
  - Set as de-enrolled in database.
  - Certification and Household Worksheet sent.
  - Newly identified matches will NOT be on the ETC output file until the proper forms are received and approved by LIDA.
  - The first month a new Lifeline match is on the output file for a ETC, a copy of the certification form will be placed in the output FTP site. If a Household Worksheet is required, that form will also be placed in the output folder.

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- **Recertification (except ETCs with the same business model as Assurance, Safelink)**
  - 54.410(f)(3) Where a state Lifeline administrator or other state agency is responsible for re-certification of a subscriber's Lifeline eligibility, the state Lifeline administrator or other state agency must confirm a subscriber's current eligibility to receive a Lifeline service by:
    - (i) Querying the appropriate eligibility databases, confirming that the subscriber still meets the program-based eligibility requirements for Lifeline, and documenting the results of that review; or
    - (ii) Querying the appropriate income databases, confirming that the subscriber continues to meet the income-based eligibility requirements for Lifeline, and documenting the results of that review; or
    - (iii) Obtaining a signed certification from the subscriber that meets the certification requirements in paragraph (d) of this section.

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- **Recertification (except ETCs with the same business model as Assurance, Safelink)-  
continued**
  - The LIDA will provide a recertification report to the ETCs in a month to be determined (November or December).
  - The LIDA will produce a recertification report annually to the ETCs.

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- **Process Changes for ETCs with the business model like Assurance Wireless and Safelink**
  - LIDA will no longer process self-enrollment applications. The last batch sent to LIDA will be delivered by August 13, 2012. These ETCs will self approve the applications.
  - These business model companies will attain their own certification and household worksheet forms.
  - A portal will be available to check program participation by August 1, 2012. The portal will have batch processing capabilities.

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- **Process Changes for ETCs with the business model like Assurance Wireless and Safelink - continued**
  - These ETCs will be responsible for their own recertification.
  - These ETCs will submit a monthly file of Lifeline approved customers to LIDA for the duplicative process.

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- **National Database**

- Texas will file to opt out of the national database.