Lifeline Claims System User Guide

November 2020

Contents

Claim Reimbursement Process

Introduction

The Lifeline Claims System (LCS) is the online filing system that Service Providers use to receive reimbursement for offering Lifeline-supported services to eligible consumers. This system was introduced in 2018 as a replacement for the FCC Form 497.

Claim Reimbursement Process

The following steps provide an overview of the claim reimbursement process:

	Steps for Submitting a Lifeline Reimbursement Claim
1.	Access LCS
2.	Select a data month to file
3.	Download a filing template
4.	Update a filing template
5.	Upload a filing template
6.	View the Support Summary
7.	Submit Claim(s) to the 497 Officer for certification
8.	Certify Claim(s)

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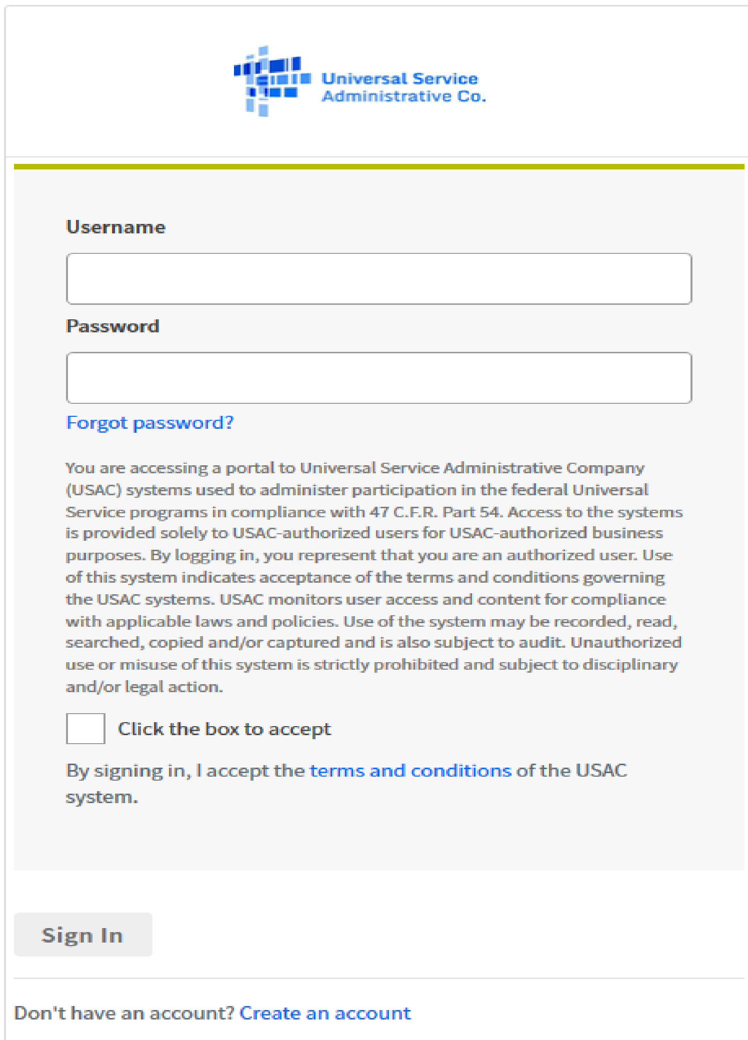
Step 1 – Access LCS

Introduction

To access the Lifeline Claims System (LCS) sign into the **One Portal** with the account associated to your E-File Entitlements.

Note: LCS users must have **497 Officer** or **497 User** credentials in order to access the system.

One Portal login page



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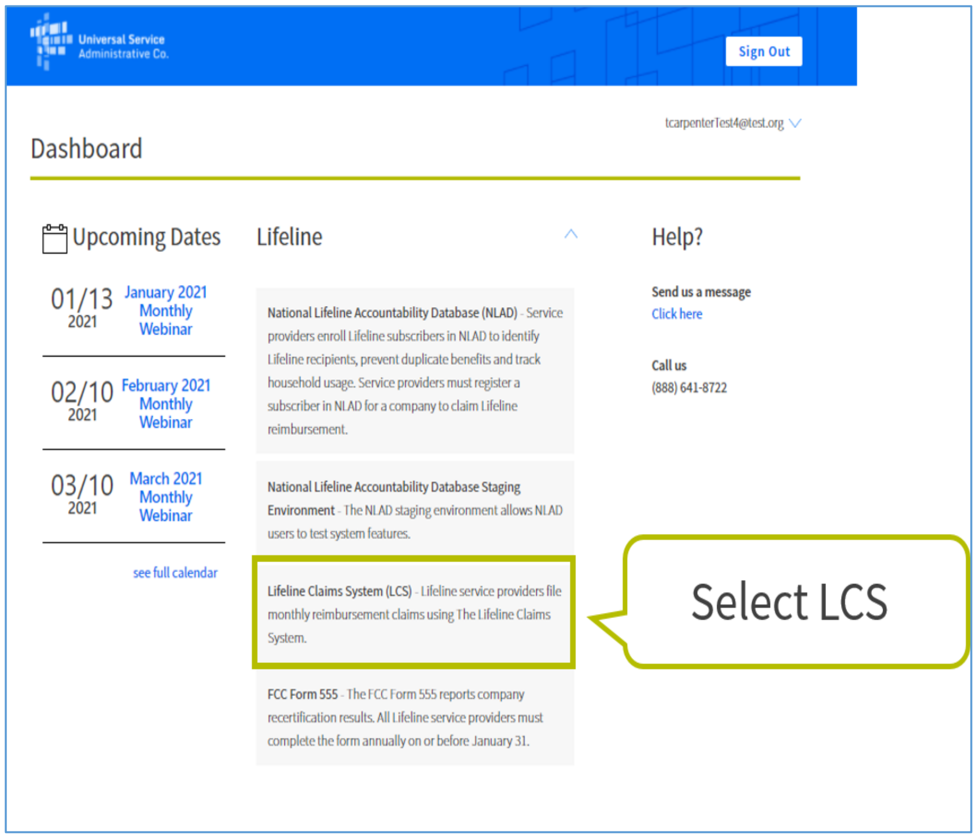
Step 1 – Access LCS, Continued

One Portal Dashboard

From the One Portal Dashboard click on the **Lifeline Claims System (LCS)** link to access LCS.

Note: User accounts that have both E-File and NLAD Entitlements can also access LCS from NLAD.



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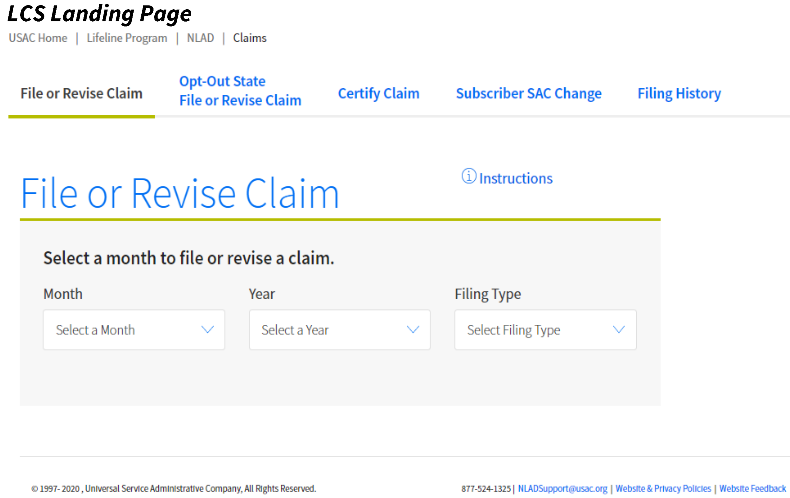
Step 1 – Access LCS, Continued

Landing Page Screenshots

LCS Landing Page



Note:

- The **Opt-Out State File or Revise Claim** page will only appear if the user has entitlements to SACs in CA, OR, and/or TX
- The **Certify Claim** page will only appear if the user has 497 Officer entitlements
- The **Subscriber SAC Change** page will only appear if the user has entitlements to multiple SACs in OR

NLAD Landing Page

Note: NLAD Users must click on the **Claims** link to be directed to the Claims System.

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Step 2 – Select Data Month to File

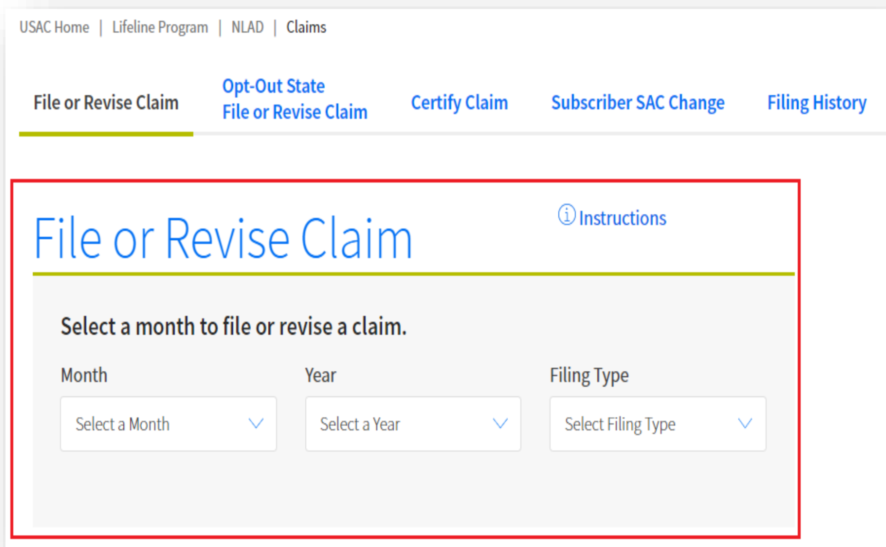
Introduction

The filing process begins by selecting the Data Month, Year, and Filing Type of the lifeline claim being submitted for reimbursement.

LCS Landing Page

The Data Month, Year and Filing Type is selected from **the File or Revise Claim** Page.

Note: Users with SACs in CA, OR, and/or TX will make their selection from the **Opt-Out State File or Revise Claim** Page.



From the Drop-down Menu, select the appropriate:

- Month
- Year
- Filing Type (Original or Revision)

SAC Status Chart

LCS generates the search results based on a user's applied filters and displays the available data for the selected Month, Year, and Filing Type in the "SAC Status" chart.

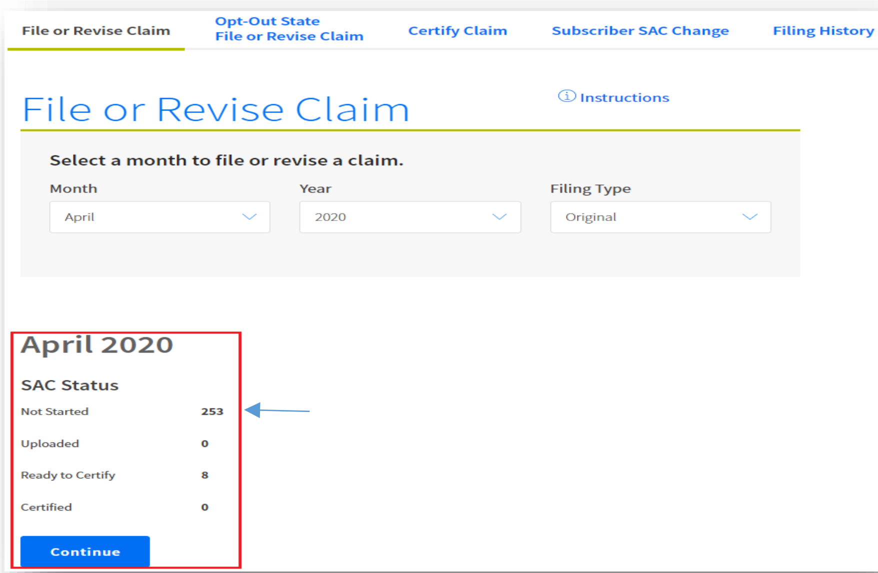
Continued

Step 2 – Select Data Month to File, Continued

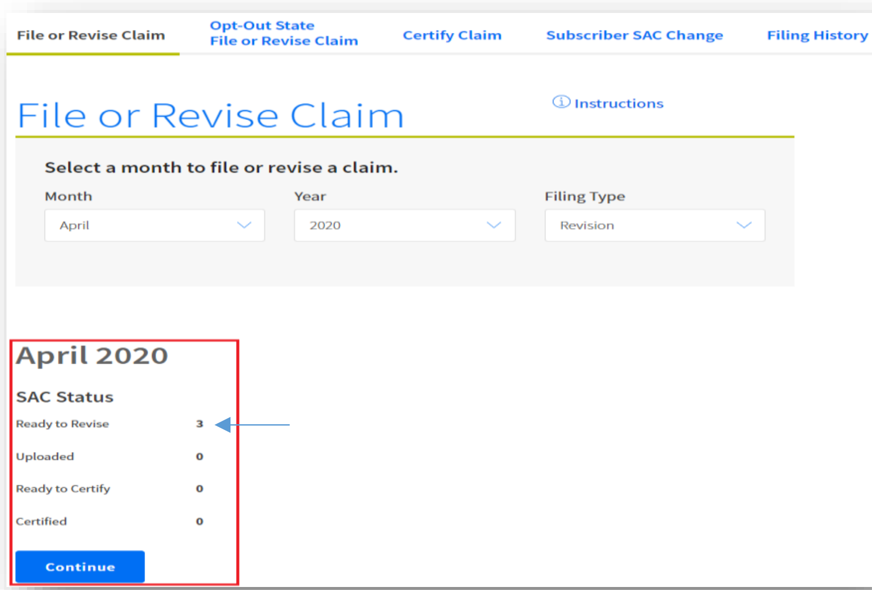
Examples of SAC Status Charts

Note: the "SAC Status" chart shows the total counts of SAC(s) available for each status. Users will only see the results for the SACs associated to their accounts.

Filing Type: Original



Filing Type: Revision



Continued

Step 2 – Select Data Month to File, Continued

SAC Status Descriptions

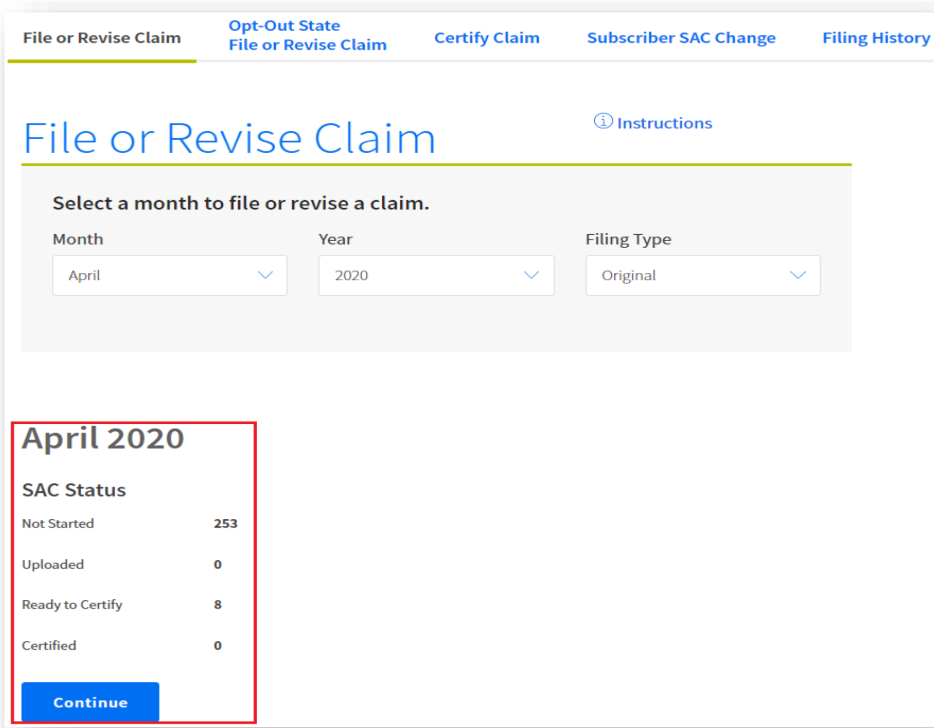
The SAC Status descriptions are below:

SAC Status	Description
Not Started	SAC(s) available to file an original claim
Ready to Revise	SAC(s) previously submitted and available for revision
Uploaded	SAC(s) successfully uploaded in LCS with no errors
Ready to Certify	SAC(s) with uploaded data in LCS ready to be certified by the 497 officer
Certified	SAC(s) with uploaded data in LCS that were certified by the 497 officer

"Continue" to Begin Filing Claim(s)

Click **Continue** at the bottom of the page to begin filing original or revised claim(s).

- Users filing an Original Claim will be directed to the **File Claim** Page.
- Users filing a Revised Claim will be directed to the **Revise Claim** Page.



For the next step, refer to **Step 3 – Download Filing Template -**

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Step 3 – Download Filing Template

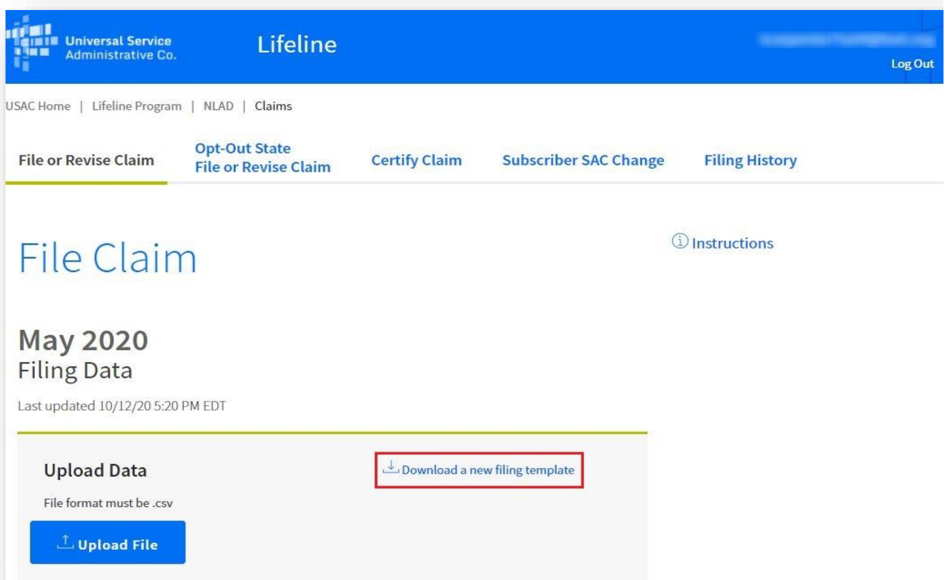
Introduction

The Lifeline claim reimbursement process requires Service Providers to download a filing template (**Claims_Input_Template.csv** file) for each month they are claiming support.

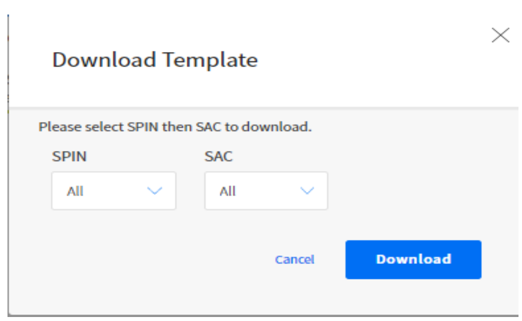
Download Filing Template for an Original Claim

The **Claims_Input_Template.csv** is downloaded from the **File Claim** Page.

Click on the link **Download a new filing template** located at the top right corner of the page.



Note: The download template feature can be customized to pull subscriber data for a specific SPIN/SAC combination.



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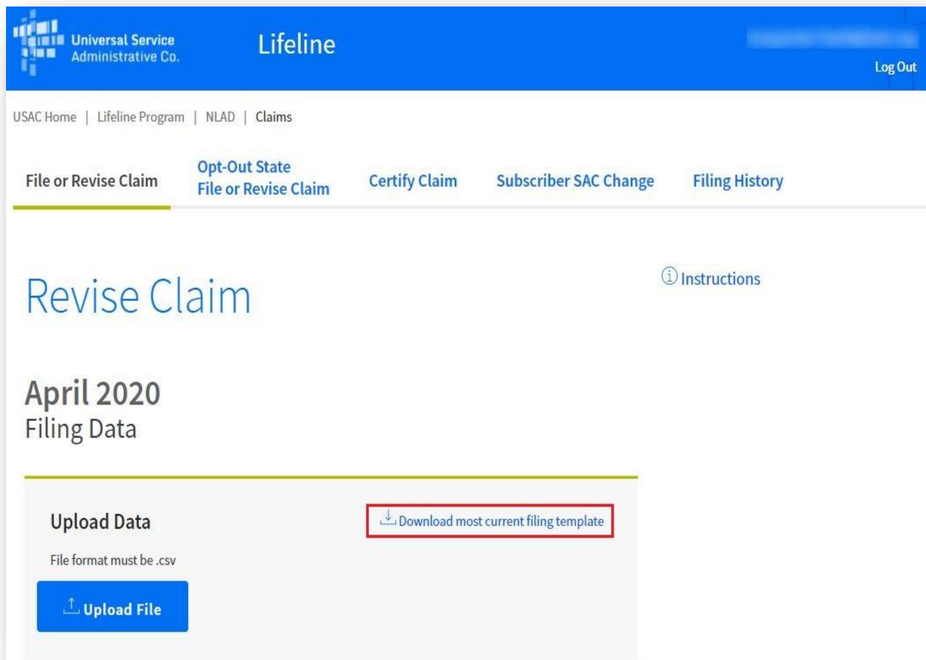
Step 3 – Download Filing Template, Continued

Download Filing Template for a Revised Claim

To submit a revised claim, click on the link **Download most current filing template** located at the top right corner of the **Revise Claim** page.



NLAD State Filing Template

Original Claim:
The downloadable **Claims_Input_Template.csv** file includes subscriber data from the **Summary and Detail Subscriber Snapshot Report(s)** taken on the 1st day of the month at 6 am ET in NLAD.

Revised Claim:
The downloadable **Claims_Input_Template.csv** file includes subscriber data from the most recent certified filing for the selected data month.

Continued

Step 3 – Download Filing Template, Continued

NLAD Opt-Out State Filing Template

Original Claim:
The downloadable **Claims_Input_Template.csv** for Service Providers in CA, OR, and /or TX is pre-populated with subscriber data provided by their State Public Utility Commission (PUC). Opt-Out State Service Providers can only claim and/or unclaim subscribers listed on the template and will not be able to add or remove records.

For users filing Revised Claim:
The downloadable **Claims_Input_Template.csv** file includes subscriber data from the most recent certified filing for the selected data month.

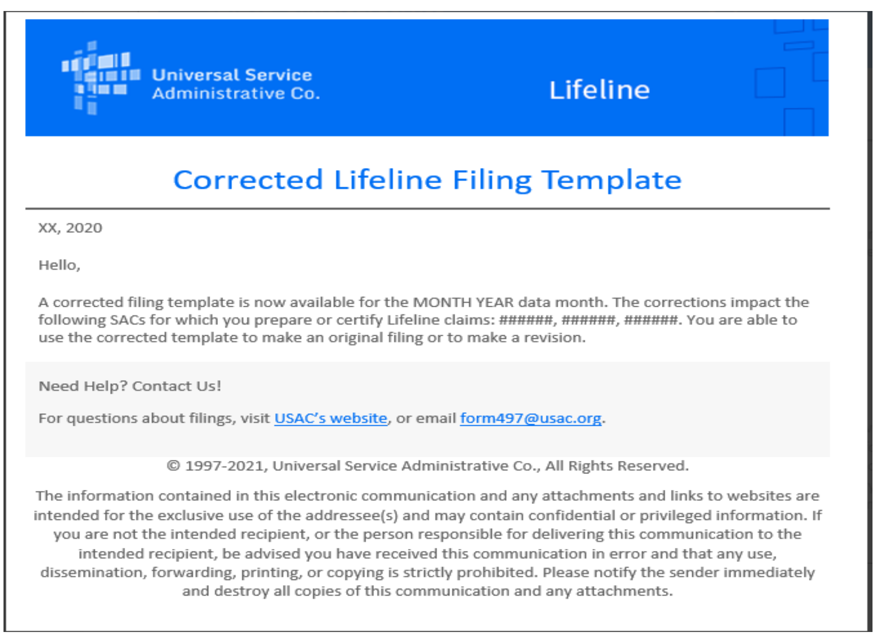
Note: Opt-out State Subscribers enrolled in NLAD (CA broadband-only service type or TX cross-border SACs) will be included on the filing template.

State (PUC) Corrected Filing Template – CA, OR, TX

When a State makes a correction to an Original and/or Revision filing, USAC notifies the Opt-out State Service Providers (CA, OR and/or TX) by email that an updated filing template is available for their review.

Note: Email will be sent to user account(s) that have entitlements to the corrected SAC/SPIN.

Corrected Filing Template email notification



Corrected Lifeline Filing Template

XX, 2020

Hello,

A corrected filing template is now available for the MONTH YEAR data month. The corrections impact the following SACs for which you prepare or certify Lifeline claims: ######, ######, ######. You are able to use the corrected template to make an original filing or to make a revision.

Need Help? Contact Us!

For questions about filings, visit USAC's website, or email form497@usac.org.

The information contained in this electronic communication and any attachments and links to websites are intended for the exclusive use of the addressee(s) and may contain confidential or privileged information. If you are not the intended recipient, or the person responsible for delivering this communication to the intended recipient, be advised you have received this communication in error and that any use, dissemination, forwarding, printing, or copying is strictly prohibited. Please notify the sender immediately and destroy all copies of this communication and any attachments.

Continued

Step 3 – Download Filing Template, Continued

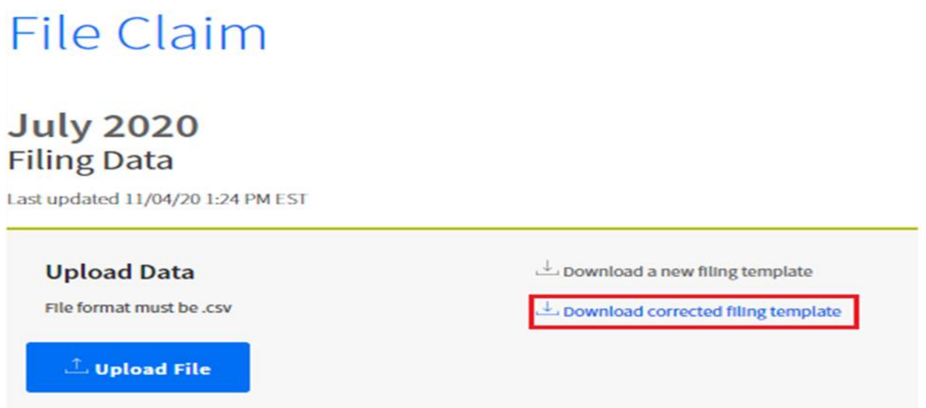
Download State Corrected Filing Template

After receiving the notification email, sign into LCS and select the corrected template's Data Month, Year and Filing Type (Original or Revision) from **the File or Revise Claim** Page.

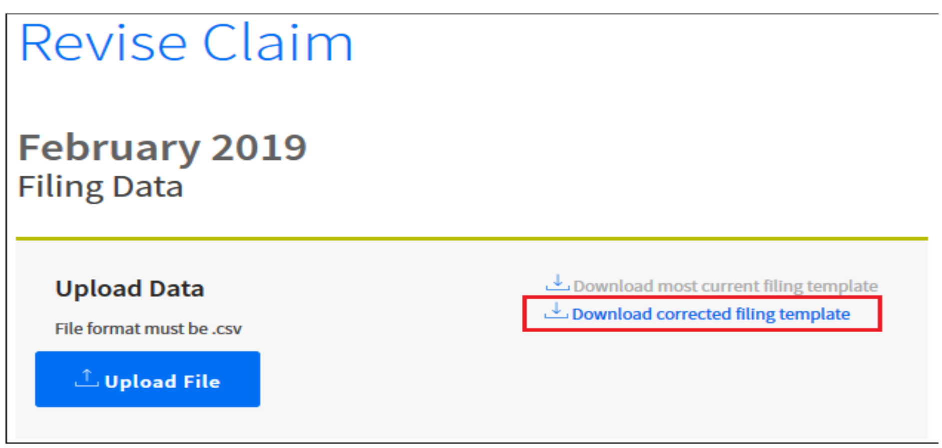
Next, click on the link **Download corrected filing template** to download the **Claims_Corrected_Input_Template.csv** file.

Note: If the State corrected filing template gets uploaded prior to the Service Provider filing for the data month, the "**Download corrected filing template**" link will not be available. Service Provider should use the available link to retrieve the updated State corrected filing template.

Original Corrected Filing Template



Revised Corrected Filing Template:



For the next step, refer to **Step 4 – Update Filing Template -**

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Step 4 – Update Filing Template

Introduction	After downloading the **Claims_Input_Template.csv** file, Service Providers must update the excel spreadsheet as necessary before saving and uploading the file into the Lifeline Claims System. **Note:** • It is recommended to rename the **Claims_Input_Template.csv** file for your records and possible future use. • The updated excel spreadsheet must be saved in the .csv file format.
Filing Template	The **Claims_Input_Template.csv** contains the following headers and data fields. The chart below identifies both NLAD and Opt-Out States data fields and requirements.

Continued

Step 4 – Update Filing Template, Continued

LCS Filing Template Field Description

Excel Column	Field Name	Required Status	More Information
A	Subscriber ID	Required	System-generated unique identifier; no input required.
B	Rate	Required	**Enter Subscriber's Rate; see guidance below (p.16) to complete "Column B"**
C	Reason Code	Conditional	**Enter Reason code for subscriber(s) where Rate = $0, see guidance below (p.16) to complete "Column C"**
D	Tribal Link Up Charges Waived	Required	**Enter subscriber's Tribal Link Up Charges waived. Tribal Benefit Flat (Column P) must = 1; see guidance below (p.16) to complete "Column D"**
E	SPIN	Required	No input required.
F	SAC	Required	No input required. **Oregon: SAC can be updated in LCS if needed. see guidance below (p.17) to complete "Column F"**
G	Last Name	Optional	N/A
H	First Name	Optional	N/A
I	Street Address	Optional	N/A
J	City	Optional	N/A
K	State	Optional	N/A
L	ZIP	Optional	N/A
M	Phone Number	Optional	N/A
N	ETC General	Optional	N/A
O	Service Type	Conditional – optional for all states except **OR** or **CA**.	No input required. **Oregon / California: Field required.** • **Service Type can be updated in LCS if needed. see guidance below (p.17) to complete "Column O"**
P	Tribal Benefit Flag	Optional	N/A
Q	Corrected	Optional **(only applicable to NLAD opt-out states (TX/ CA/OR) beginning with the Dec. 2020 data month**)	This column will be blank, unless the state files a correction after the template is generated the first time; no input required. If there is a correction to a subscriber's record, that row will contain the day/time the record was updated, in the following format: mm_dd_yyyy_hhmm If a state makes a correction to a file: • USAC will notify service providers by email that an updated template is available for their review.

Continued

Step 4 – Update Filing Template, Continued

Validation Rules

Refer to the LCS Upload Field Descriptions document for the complete list of the validation rules.

Updating Template for Original Claim

The following Columns are Required, Conditional, or Optional:

Column B - Rate - Required

- **To Claim Subscriber:** Enter "xx" dollar amount for each subscriber record that should be claimed. Rate cannot exceed $9.25 for non-tribal subscribers, and $34.25 for tribal subscribers.
- **To Unclaim Subscriber:** Enter "0" dollar amount for each subscriber record that should not be claimed. A reason code is required to be entered for all unclaimed subscriber records. (See Reason Codes list below.)

Column C – Reason Code - Conditional

- Enter a Reason Code for each subscriber record being unclaimed (i.e. Column B – Rate = "0").

Reason Codes list:

Reason Code	Description
U1	Signed up for Lifeline, no usage yet
U2	Subscriber is in a non-usage cure period (snapshot date falls within the 15 day cure period
U3	Subscriber lost eligibility but was not de-enrolled prior to snapshot
U4	Subscriber's account is suspended
U5	Failed to match subscriber in ETC's internal system
U6	Other

Column D – Tribal Link Up Charges Waived - Required

- Enter the Tribal Link Up Charges Waived for all eligible subscriber records as applicable. This can only be claimed if Column P – Tribal Benefit Flag = 1 and Tribal Link Up Charges Waived cannot exceed $100.00

Continued

Step 4 – Update Filing Template, Continued

Column F - SAC - Required

- Service Providers in Oregon (OR) can update their subscribers SACs in LCS if needed; review **Subscriber SAC Change** guidance below for additional information.

Column O - Service Type - Conditional

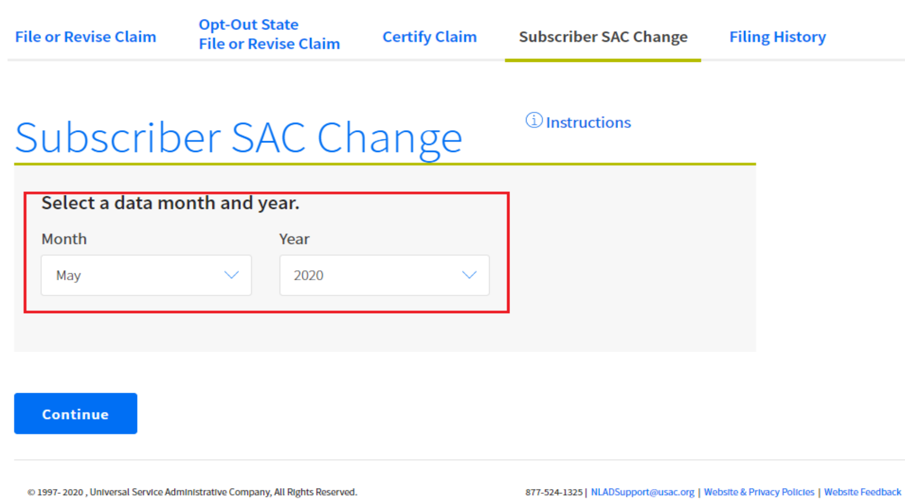
- Service Providers in Oregon (OR) and California (CA) can add and/or update their subscribers Service Types in LCS if needed:
    - In **column O** enter -- voice, broadband, bundledvoice, bundledbroadband, or bundeledvoicebroadband.
    - **Note:** Service Type updates can only be completed for Original filings.

Subscriber SAC Change - Oregon

Service Providers in Oregon (OR) can update the SAC that a subscriber is assigned to on the State PUC file upload. The feature will only appear to Service Providers with multiple SACs in OR.

Note: Any SAC change to a subscriber's record must be completed prior to beginning the filing process for the impacted SACs (both the new and the State-provided SAC). SAC updates can only be completed for Original filings.

Click on the **Subscriber SAC Change** page in LCS to access this feature.



From the Drop-down Menu, select the **Month** and **Year** and Click **Continue** at the bottom of the page.

Continued

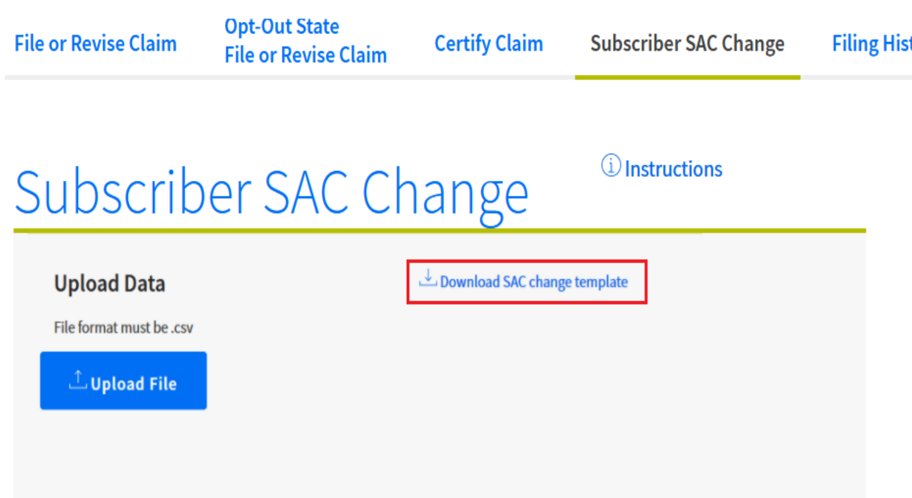
Step 4 – Update Filing Template, Continued

Download SAC Change Template

On this page Service Providers in OR can download a SAC Change Template (csv. format) of all their subscribers in the SACs they select and make the necessary updates before saving and uploading the file.

The user updating the SACs will have the entitlements for both the SAC that the subscriber is assigned to by the State PUC, as well as the SAC the subscriber should be transferred to.

Next, click on the link **Download SAC change template** to download the file to be uploaded.



SAC Change Template - Field requirements:

Excel Column	Field Name	Required Status	More Information
A	Subscriber ID	Required	No Input required
B	First Name	Required	No Input required
C	Last Name	Required	No Input required
D	Current SAC	Required	No Input required
E	New SAC	Required	**Input Required; Field will be blank upon download**

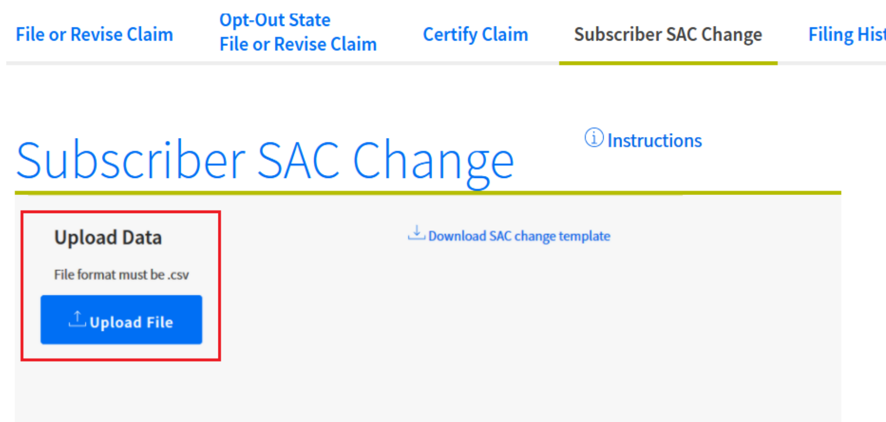
Note:
- **Column A – D: No input required; Column E: New SAC entry required**
- The .csv file headers should be listed in that order and all fields are required.
- Service Providers only need to include the subscriber records that are changing SAC(s).

Continue

Step 4 – Update Filing Template, Continued

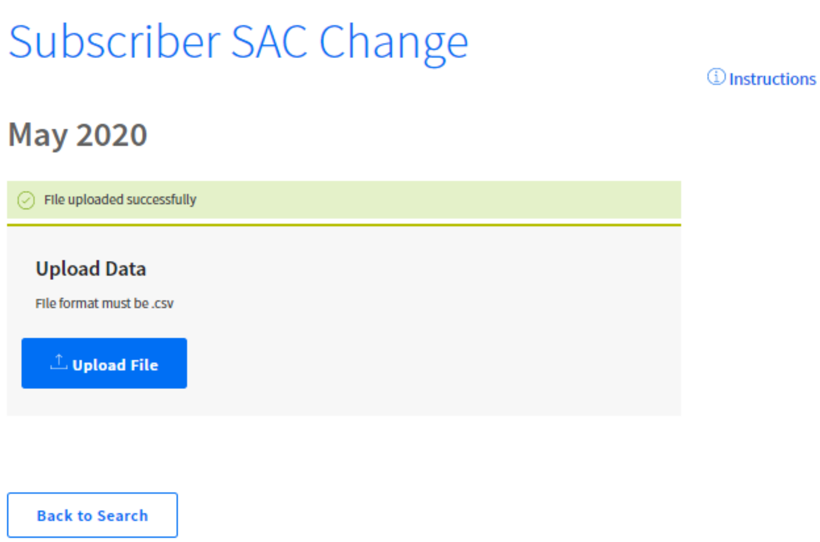
Upload Subscriber SAC Change Template

To upload a SAC change template, click on the link **Upload File** located at the top left corner of the **Subscriber SAC Change page** and select the file you saved to upload.



SAC Change Successful Upload

Users will receive the success notification below if the SAC Change Template gets uploaded without errors.



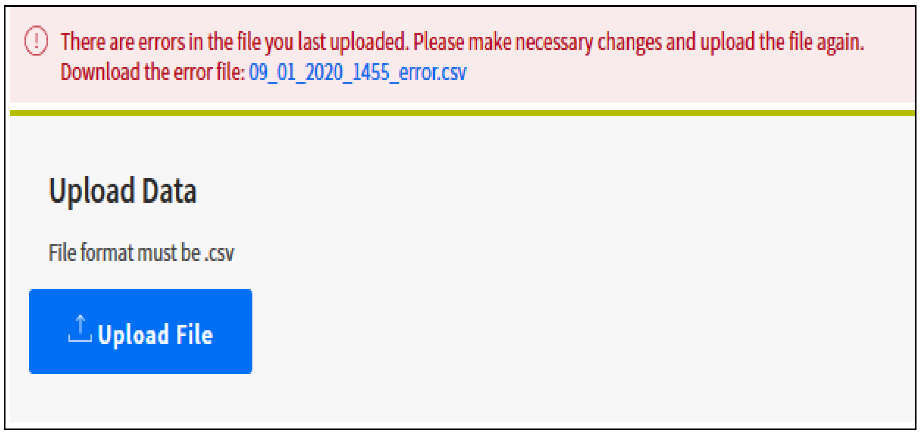
Note: For the next step, refer to **Step 3 –Download Filing Template (P.10)** to submit an Original and/or Revision filing.

Continued

Step 4 – Update Filing Template, Continued

SAC Change Unsuccessful Upload

Users will receive the error notification below if the Subscriber SAC Change Template gets uploaded with errors; template must be revised before re-upload.



SAC Change Error File

To download the error file, click on the error file name in the notification (**mm_dd_yyy_hhmm_error.csv**), where the file name is based on the day/time the file was generated.

mm	Month
dd	Day
yyyy	Year
hh	Hour (24 hour format)
mm	Minutes

Note: After resolving the errors on the SAC Change Template, refer to **Step 3 –Download Filing Template (P.10)** to submit an Original and/or Revision filing.

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Step 5 – Upload Filing Template

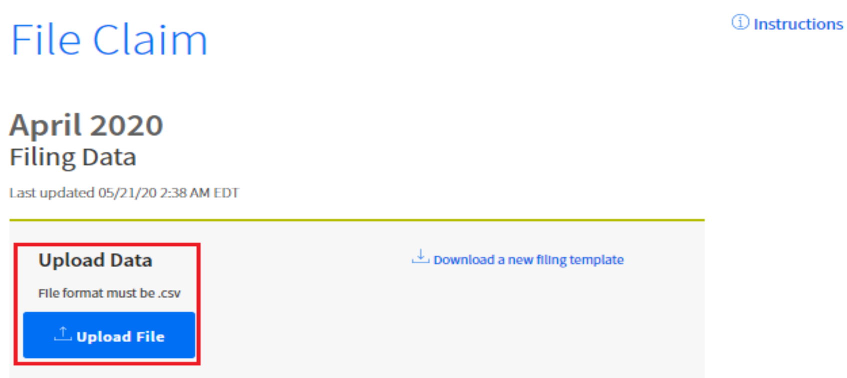
Introduction

After updating the ***Claims_Input_Template.csv*** spreadsheet, the file must be saved and uploaded to submit a claim for reimbursement.

Note: The saved file format must be .csv

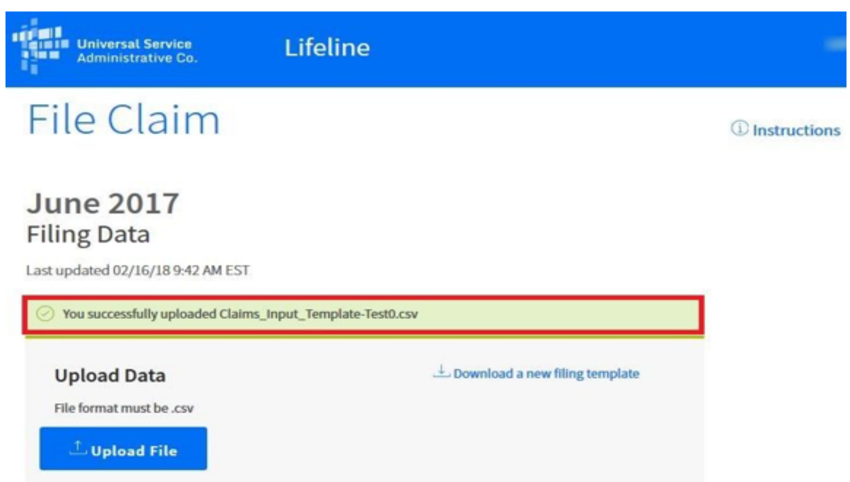
Upload Original Filing Template

To upload an Original filing template, click on the link **Upload File** located at the top left corner of the **File Claim Page** and select the file you saved to upload.



Successful Upload

Users will receive the success notification below if the filing template gets uploaded without errors.



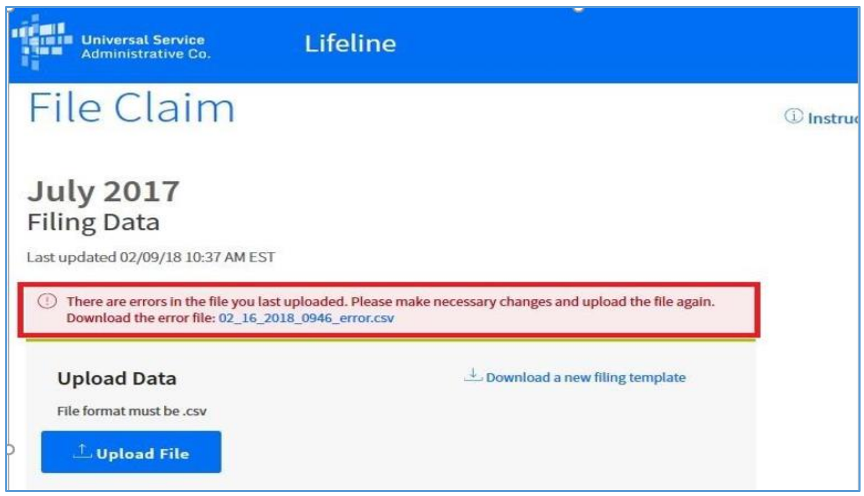
Continued

Step 5 – Upload Filing Template, Continued

Unsuccessful Upload

Users will receive the error notification below if the filing Template gets uploaded with errors; the template must be revised before re-upload.

Note: Refer to the LCS Upload Field Descriptions document for the complete list of the validation rules.



Error File

To download the error file, click on the error file name in the notification (**mm_dd_yyy_hhmm_error.csv**), where the file name is based on the day/time the file was generated.

mm	Month
dd	Day
yyyy	Year
hh	Hour (24 hour format)
mm	Minutes

Error File Example

1	rowNumber	subscriberId	errorMessage	errorData
2	1	1GFWTSX94	Rate is required.	null
3	2	NC846B131	Rate is required.	null
4	3	1G8W62ATW	Rate is required.	null
5	4	1R846NG90	Rate is required.	null
6	5	U08462H45	Rate is required.	null
7	6	A0DF6T3K8	Rate can not exceed $9.25 for non-tribal subscriber or exceed $34.25 for tribal subscriber.	99999

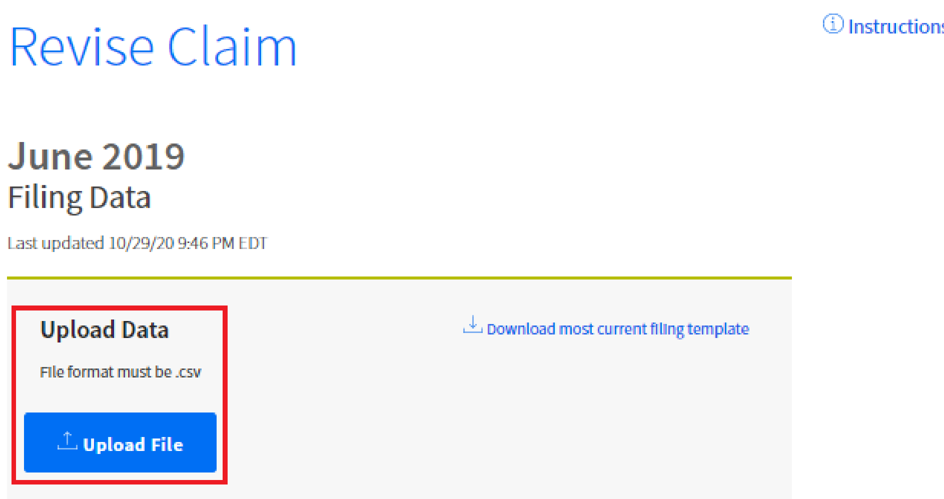
Continued

Step 5 – Upload Filing Template, Continued

Upload Revision Filing Template

Note: The process to upload a Revision filing template is very similar to the Original filing process.

To upload a Revision filing template, click on the link **Upload File** located at the top left corner of the **Revise Claim Page** and select the file you saved to upload.



Subscriber Counts Table

After a successful upload, the Subscriber Counts table is updated in real time and will reflect the data included on the latest uploaded template.

Note: There is a Keyword Search box which users can lookup Service Providers by entering a valid SPIN, SAC, Name, or Status.

Continued

Step 5 – Upload Filing Template, Continued

Examples of Subscriber Counts Table

Uploaded File contains Subscribers in Original Claims:

Subscriber Counts

Displaying 1 to 5 of 38 records

Type a keyword to search

SPIN ▼	SAC	Name	Status	Non-Tribal Uploaded	Non-Tribal Claimed	Tribal Uploaded	Tribal Claimed	Total Uploaded	Total Claimed	Tribal Link-up
[illegible]	[illegible]	[illegible]	Not Started	0	0	0	0	0	0	0
[illegible]	[illegible]	[illegible]	Not Started	0	0	0	0	0	0	0
[illegible]	[illegible]	[illegible]	Uploaded	1	1	0	0	1	1	0

Uploaded File contains Subscribers in Revised Claims:

Subscriber Counts

Displaying 1 to 3 of 3 records

Filter claims by Revision in Progress

Type a keyword to search

SPIN ▼	SAC	Name	Status	Non-Tribal Last Claimed	Non-Tribal Revised Claim	Tribal Last Claimed	Tribal Revised Claim	Total Last Claimed	Total Revised Claim	Revised Tribal Link-up
[illegible]	[illegible]	[illegible]	Uploaded	10	0	14	0	24	0	0
[illegible]	[illegible]	[illegible]	Not Started	1	1	5	5	6	6	0
[illegible]	[illegible]	[illegible]	Uploaded	10	10	10	10	20	20	0

Continued

Step 5 – Upload Filing Template, Continued

Subscriber Counts Table Descriptions

Original Claims:

Field Name	Description
SPIN	Service Provider Identification Number
SAC	Study Area Code
Name	ETC Name
Status	SAC Status: Not started, Uploaded, Ready to Certify, Certified
Non-Tribal Reported	Total count of Non-Tribal subscribers **reported** on the Summary and Detail Subscriber Snapshot Report(s)
Non-Tribal Claimed	Total Count of Non-Tribal subscribers **claimed**
Tribal Reported	Total count of Tribal subscribers **reported** on the Summary and Detail Subscriber Snapshot Report(s)
Tribal Claimed	Total Count of Tribal subscribers **claimed**
Total Reported	Total count of Non-Tribal/ Tribal subscribers **reported** on the Summary and Detail Subscriber Snapshot Report(s)
Total Claimed	Total Count of Non-Tribal/ Tribal subscribers **claimed**
Tribal Link-up	Total Tribal Link up charges **waived**

Revised Claims:

Field Name	Description
SPIN	Service Provider Identification Number
SAC	Study Area Code
Name	ETC Name
Status	SAC Status: Ready to Revise, Uploaded, Ready to Certify, Certified
Non-Tribal Last Claimed	Total count of Non-Tribal subscribers **last claimed**
Non-Tribal Revised Claimed	Total Count of Non-Tribal subscribers **revised**
Tribal Last Claimed	Total count of Tribal subscribers **last claimed**
Tribal Revised Claimed	Total Count of Tribal subscribers **revised**
Total Last Claimed	Total count of Non-Tribal/ Tribal subscribers **last claimed**
Total Revised Claimed	Total Count of Non-Tribal/ Tribal subscribers **revised**
Revised Tribal Link-up	Total **revised** Tribal Link up charges **waived**

For the next step, refer to **Step 6 – View Support Summary -**

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Step 6 – View Support Summary

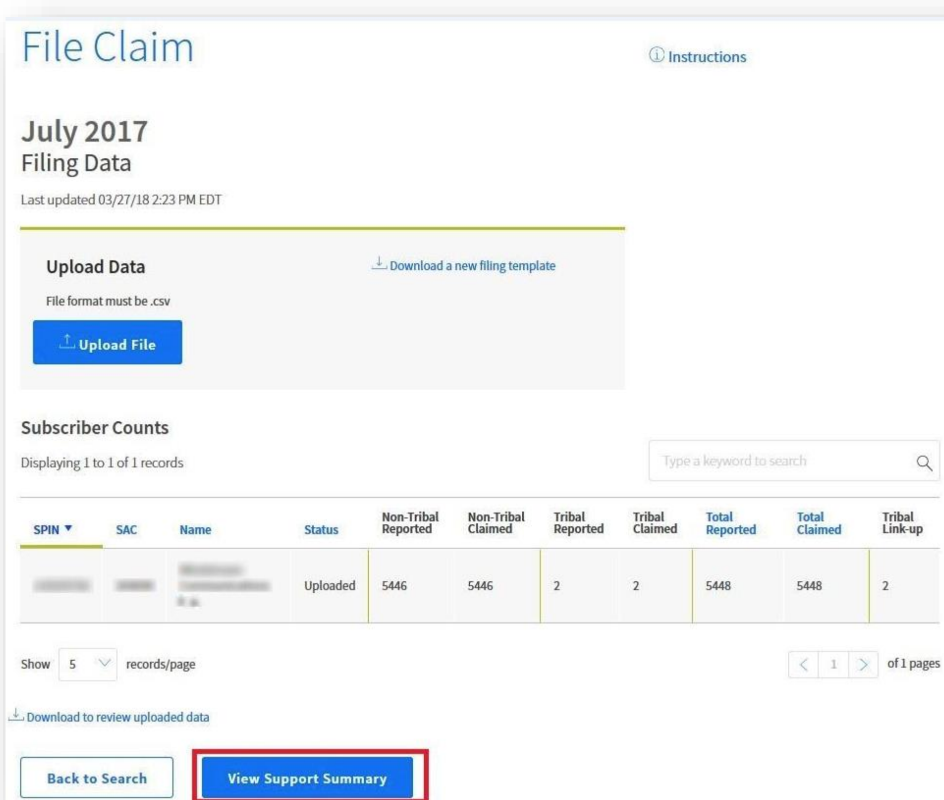
Introduction

From the Support Summary Page, Service Providers can view support details at the SAC level before marking them ready to submit for the 497 officer to certify.

Note: The user must access the **View Support Summary** page in order to mark the claim(s) ready for the 497 Officer certification.

Accessing the Support Summary Page

To Access the Support Summary Page, click on **View Support Summary** after uploading your subscriber data file.



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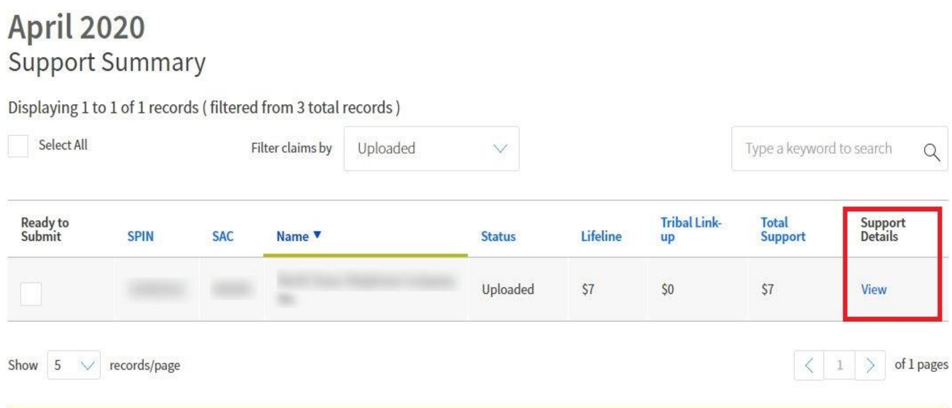
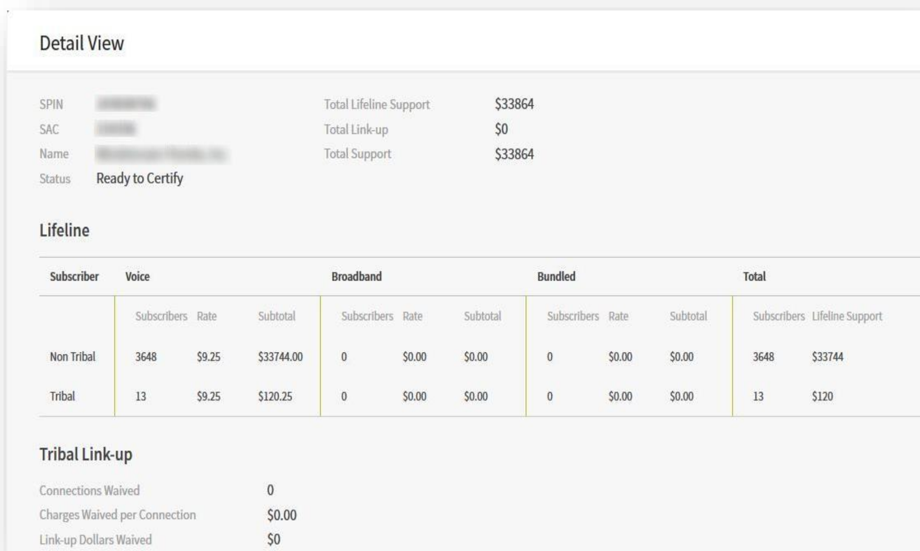
Step 6 – View Support Summary, Continued

View Support Details To view a detail summary of a SAC filing, click on the **View** link located under the Support Details column.



Detail View Following is an example of the Detail View that will be displayed for a SAC's filing.



Voice: Total count of Voice and Bundled - Voice service types
Broadband: Total count of Broadband and Bundled - Broadband service types
Bundled: Total count of Bundled - Voice and Broadband service type

For the next step, refer to **Step 7 – Submit Claim(s) for Certification -**

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Step 7 – Submit Claim(s) for Certification

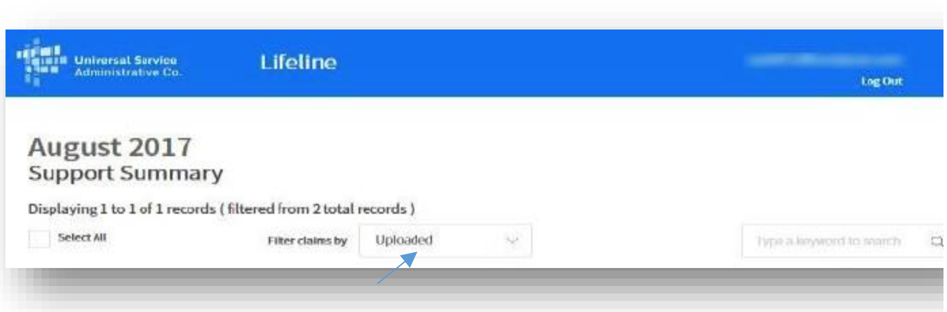
Introduction

Filings ready to be submitted to the 497 Officer to certify are selected from the **Support Summary Page**.

To Access the Support Summary Page, click on **View Support Summary**.

Filter Claims

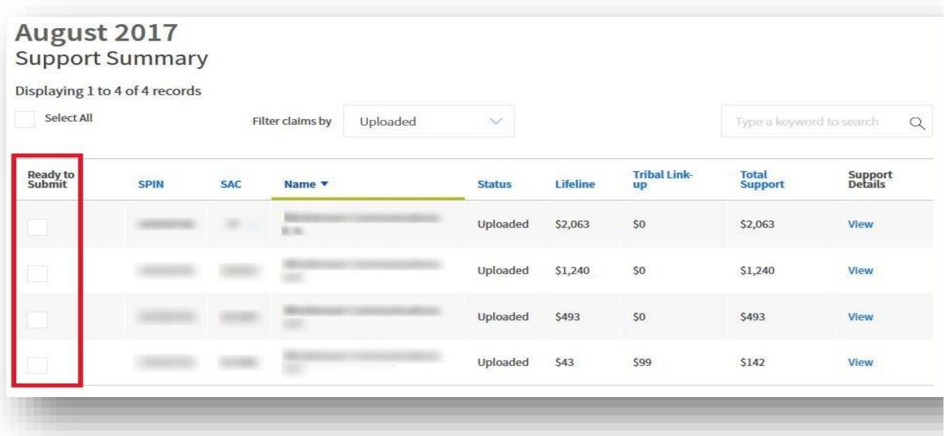
To display the claims that are ready to submit for certification, **Filter claims by** "Uploaded."



Select SACs "Ready to Submit"

The user can select "All" or individual SACs that have been identified as "Ready to Submit."

Either click on the **Select All** checkbox or on the checkbox under the "Ready to Submit" column next to each individual SAC that the user wants the 497 Officer to certify.



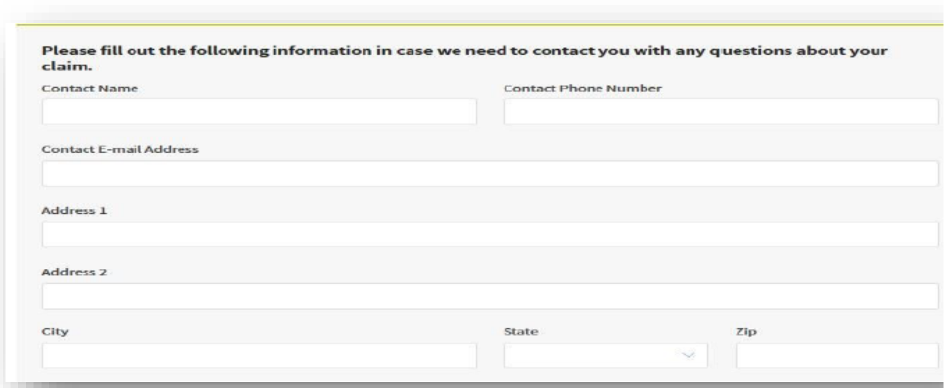
Continued

Step 7 – Submit Claim(s) for Certification, Continued

Complete Contact Information

Users are required to complete the contact information section before submitting claims to be certified.

Note: It is helpful to provide the information for the individual who is most familiar with the data submitted on the claim.



Submit Claims to Certify

Click on the **Submit Claims to Certify** link at the bottom of the page to make your completed claims available to the 497 Officer for certification.

View/Print PDF of Claim Submitted for Certification

After claims are submitted for certification, the status of the claims will change to **Ready to Certify**. To view PDFs that have been submitted for certification, filter claims by **Ready to Certify**. All available PDFs can be viewed/printed under the Support Details columns.

Note: Refer to **View and Download PDFs During Claim Submission Process** for additional information. (p.34)

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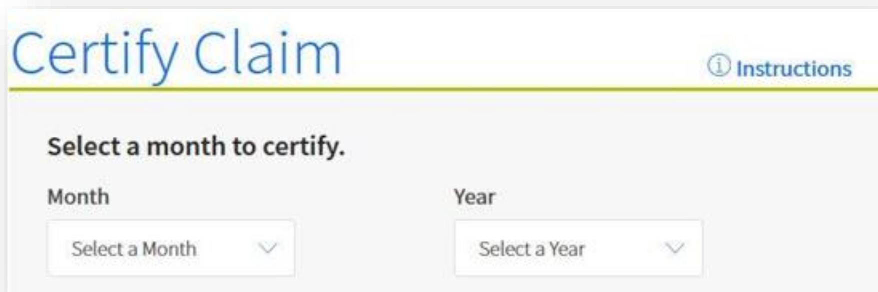
Step 8 – Certify Claim(s)

Introduction

The **Certify Claim Page** is only accessible to a user with a 497 Officer account. It is from this page that the 497 Officer will select the SAC(s) to certify and submit for processing.

Select Data Month of Claim(s) to Certify

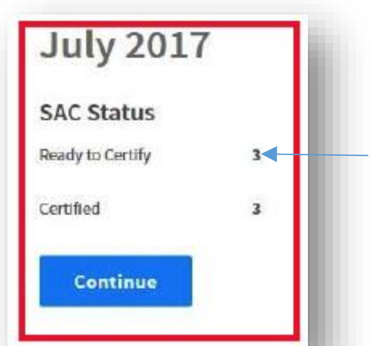
The 497 Officer must select a specific Data month and Year of claims to be certified.



Note: If claims have been submitted for multiple months, they must be selected, viewed, and certified separately.

Status Count of Claims "Ready to Certify"

A Status Chart will be displayed identifying the number of SACs that are ready for the 497 Officer to certify.



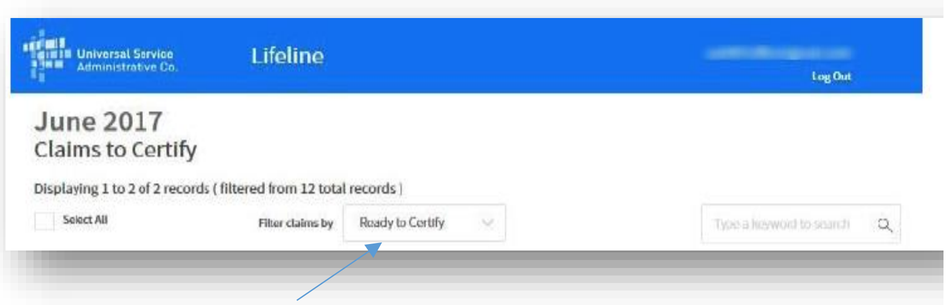
To begin certifying claim(s), click on **Continue** at the bottom of the page.

Continued

Step 8 – Certify Claim(s), Continued

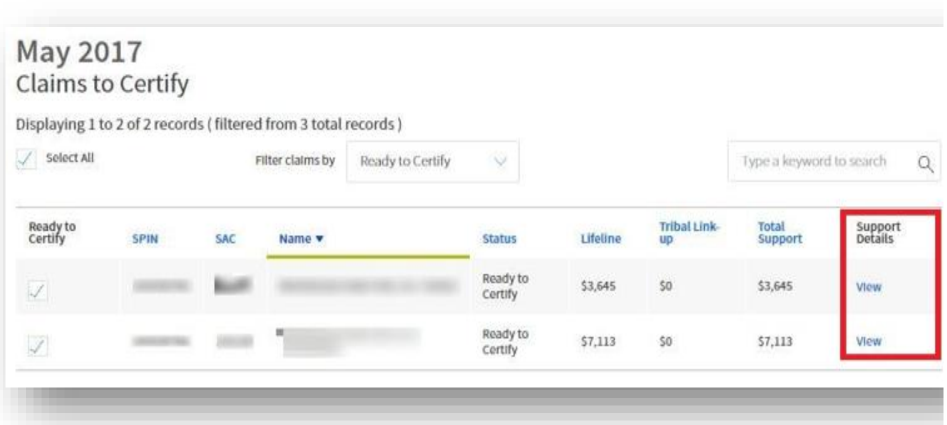
Filter Claims

To display the claims that are ready for certification, **Filter claims by** "Ready to Certify."



View SAC Support Details

The 497 Officer can view the support details (subscriber counts and rates) for any SAC by clicking on the **View** link located under the Support Details column.



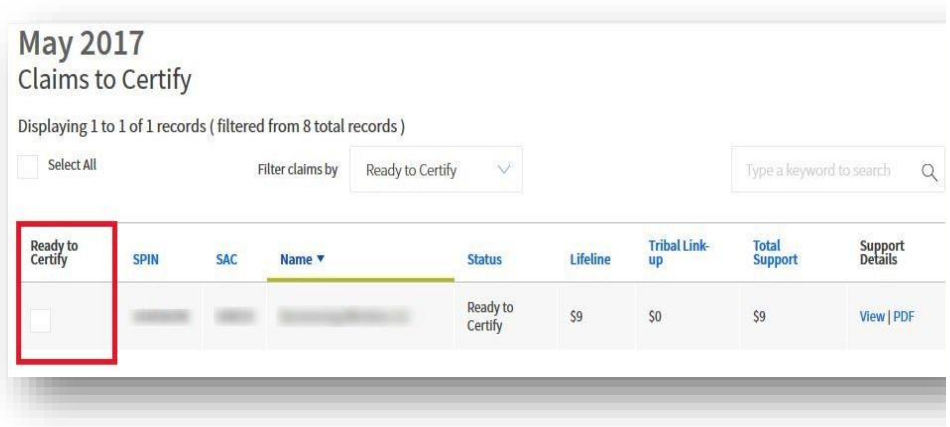
Continued

Step 8 – Certify Claim(s), Continued

Select SAC(s) to Certify

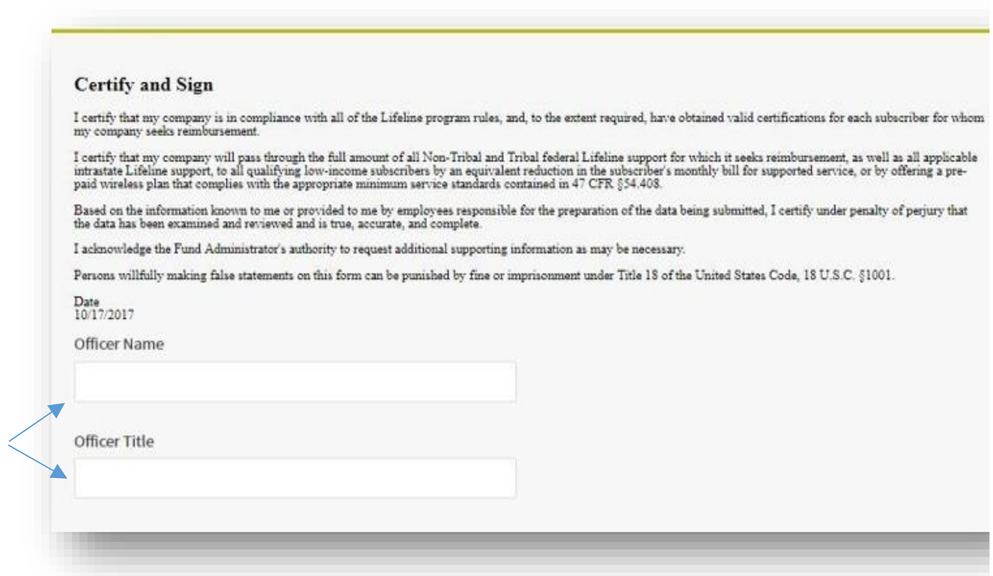
The 497 Officer can select “All” or individual SACs that have been identified as “Ready to Certify.”

Either click on the **Select All** checkbox or on the checkbox under the “Ready to Certify” column next to each individual SAC that the officer wants to certify.



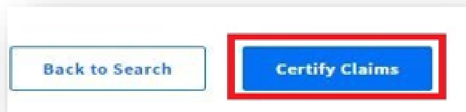
Certify and Sign

The Form 497 Officer must enter their Name and Title to confirm certification.



Continued

Step 8 – Certify Claim(s), Continued

Complete Certification	After signing the certification, the Form 497 Officer completes the certification process by clicking on the **Certify Claims** button at the bottom of the Claims Page. 
View/Print PDF of Certified Claims	After claims have been certified, the status of the claims will change to **Certified**. To view PDFs of Certified claims, **filter claims by** Certified. All available PDFs can be viewed/printed under the Support Details columns.

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View and Download PDFs during Claim Submission Process

Introduction

Lifeline Claims Worksheet PDF documents are only available for claims that are in the following status:

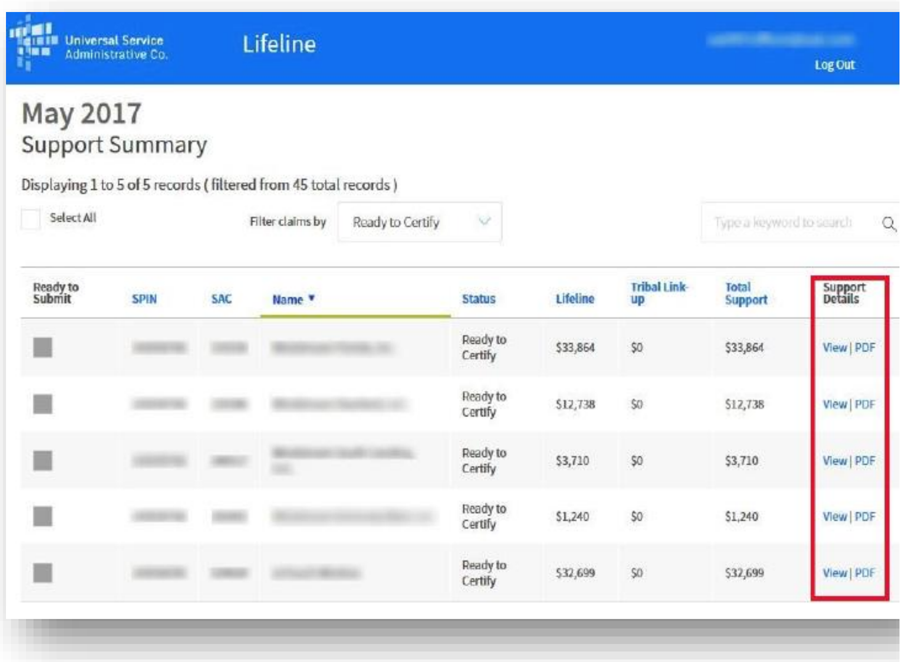
- Ready to Certify
- Certified

View PDFs – Ready to Certify Claims

After claims are submitted for certification, the status of the claims will change to **Ready to Certify**. To view PDFs that have been submitted for certification, filter claims by **Ready to Certify**. All available PDFs can be viewed under the Support Details columns.

Note: Since the claims have not yet been certified by the 497 Officer, the certification page will not be completed.

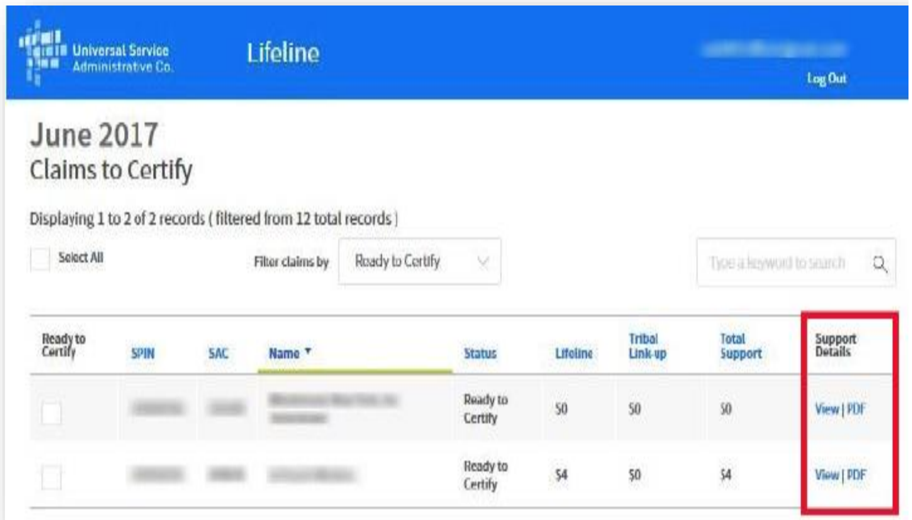
Viewing from **Support Summary Page**



Continued

View and Download PDFs during Claim Submission Process, Continued

Viewing from **Claims to Certify Page** (Applicable only to 497 Officers**)**



View PDFs – Certified Claims

The 497 User and 497 Officer can view the PDFs of claims that have been certified.

After claims are certified, the status of the claims will change to **Certified**. To view PDFs that have been certified, filter claims by **Certified**. All available PDFs can be viewed under the Support Details columns.

Note: Certified claims PDFs will include the 497 Officer certification.

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Filing History

Introduction

The **Filing History** page provides the user the opportunity to review the history of certified (Original and Revised) Lifeline claims and download a printable PDF.

Filing History Archive

The list of available claims a user can retrieve/view/download is dependent on the data month of the claim.

The Filing History archive in LCS consists of:

- all 2018 and Future Original and Revised certified claims submitted through LCS
- The most recent Original or Revised certified Form 497 submitted through E-File.

Note: Original and Revised Paper Form 497s submitted through email, fax, or mail are not retrievable in LCS.

Continued

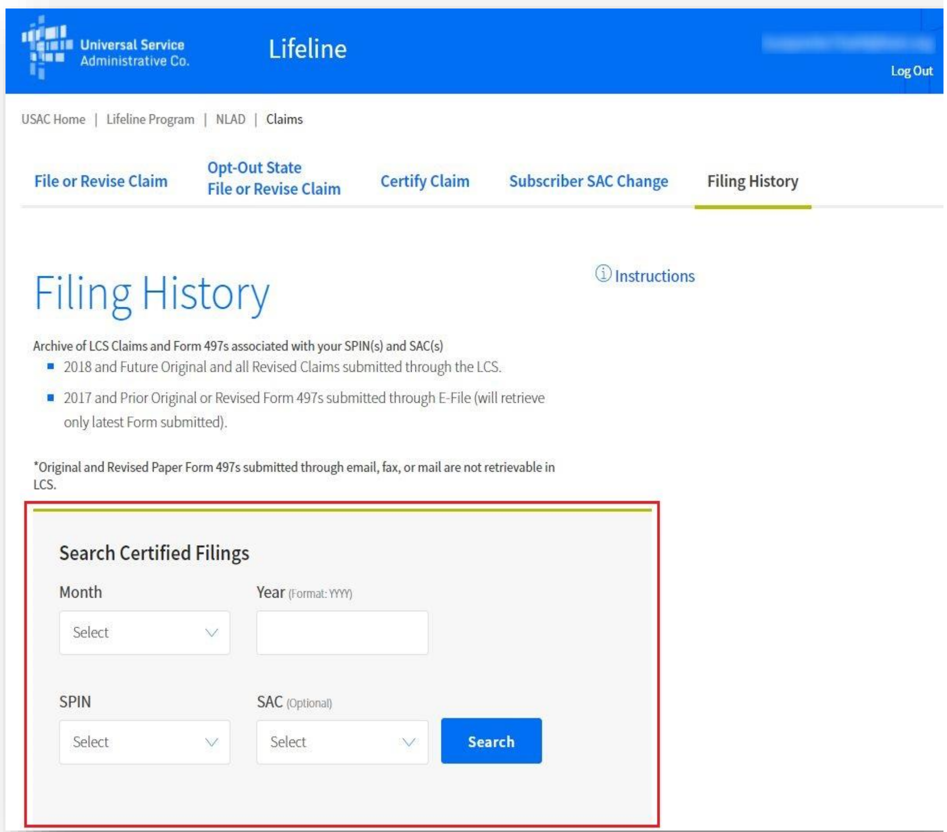
Filing History, Continued

How to Retrieve Filing History

The 497 User and 497 Officer can retrieve submitted certified claims to view/download.

From the Drop-down Menus on the **Filing History** page, select the appropriate

- Month
- Year
- SPIN
- SAC (Optional)



Continued

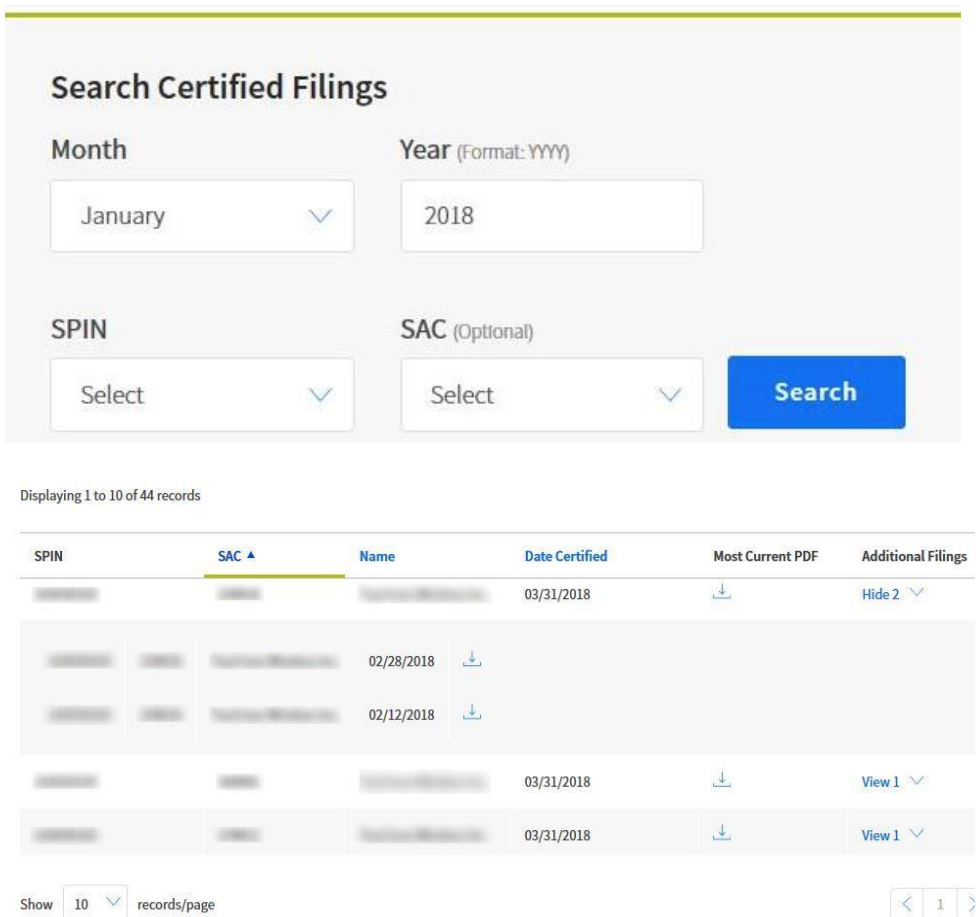
Filing History, Continued

Retrieve Filing History – January 2018 Data Months and Future

All Original and Revised claims submitted through LCS for data months beginning with January 2018 can be retrieved for review/download.

LCS generates a list of all certified Lifeline Claims associated with the selected Month, Year, SPIN and SAC (Optional).

- For filings with multiple revisions the available versions can be reviewed by clicking on the **"View #"** drop-down filter under the **"Additional Filings"** column.



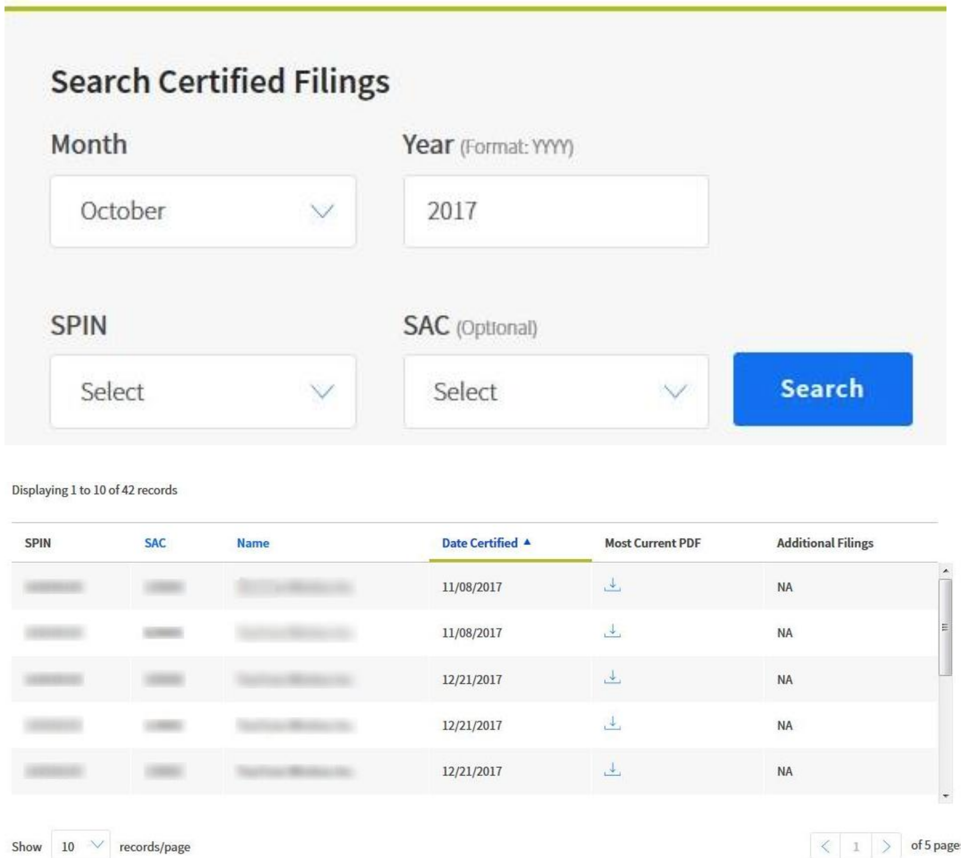
Continued

Filing History, Continued

Retrieve Filing History – December 2017 and Prior

Original or Revised Form 497s submitted through E-File for data months beginning with January 2007 through December 2017 can be retrieved for review/download.

LCS generates a list of the **latest submitted** certified Form 497 associated with the selected Month, Year, SPIN and SAC (Optional). The Additional Filings column is Not Applicable for Form 497 submitted claims.



Continued

Filing History, Continued

PDFs and Filing History	The 497 User and 497 Officer can view/print a PDF Lifeline Claims Worksheet from several pages within LCS: • Support Summary • Certify • Filing History **Note:** To retrieve a PDF Lifeline Claims Worksheet, claims must be in either the **Ready to Certify** or **Certified** status.
Which Form 497s Cannot be Retrieved Through LCS	The following Form 497s are not retrievable through LCS: • Original Form 497s submitted through E-File, if the most current Form 497 submitted is a Revision • Multiple Revisions for the same data month submitted through E-File (only latest will be retrieved) • Original Form 497s submitted through email, fax, or mail • Revised Form 497s submitted through email, fax, or mail
Download PDF	The user can download the Lifeline Claims Worksheet or Form 497 by clicking on Download icon next to each filing.

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