

Lifeline Claims System User Guide

November 2020

Contents

Claim Reimbursement Process _____	3
Step 1 – Access LCS _____	4
Step 2 – Select Data Month to File _____	7
Step 3 – Download Filing Template _____	10
Step 4 – Update Filing Template _____	14
Step 5 – Upload Filing Template _____	21
Step 6 – View Support Summary _____	26
Step 7 – Submit Claim(s) for Certification _____	28
Step 8 – Certify Claim(s) _____	30
View and Download PDFs During Claim Submission Process _____	34
Filing History _____	36

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)

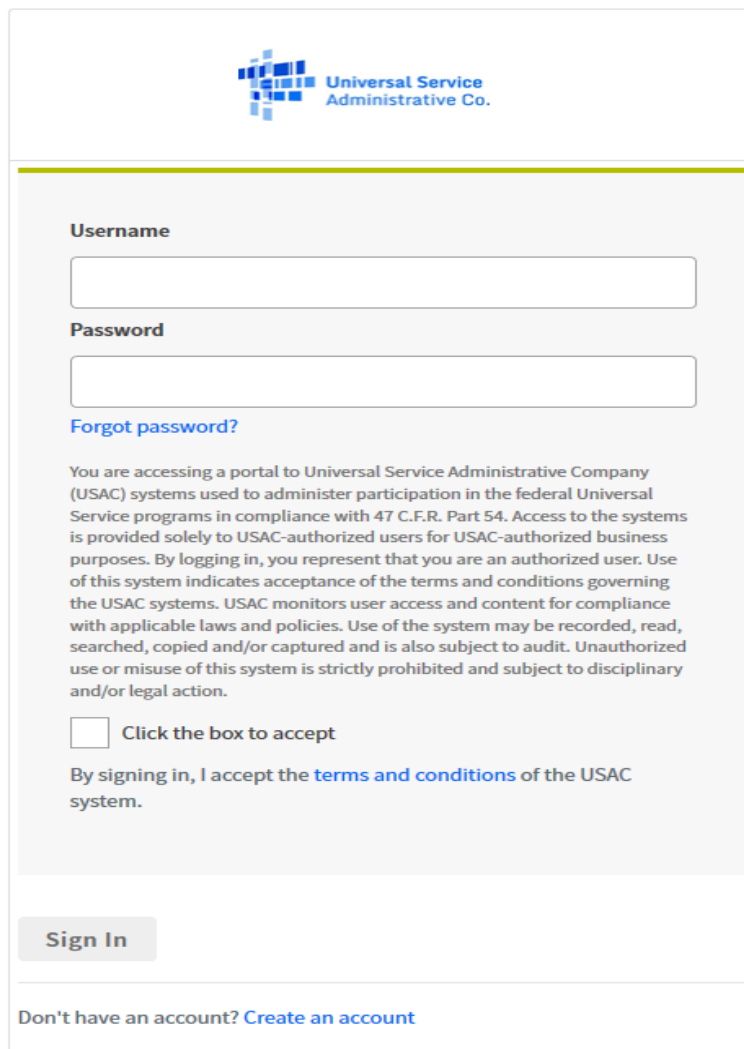
Step 1 – Access LCS

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



The screenshot shows the One Portal login page for Universal Service Administrative Co. At the top, there is the company logo and name. Below this is a login form with two input fields: 'Username' and 'Password'. Under the password field is a link for 'Forgot password?'. A large block of text contains a disclaimer about system access and usage. Below the disclaimer is a checkbox labeled 'Click the box to accept' and a sentence: 'By signing in, I accept the [terms and conditions](#) of the USAC system.' At the bottom of the form is a 'Sign In' button and a link: 'Don't have an account? [Create an account](#)'.

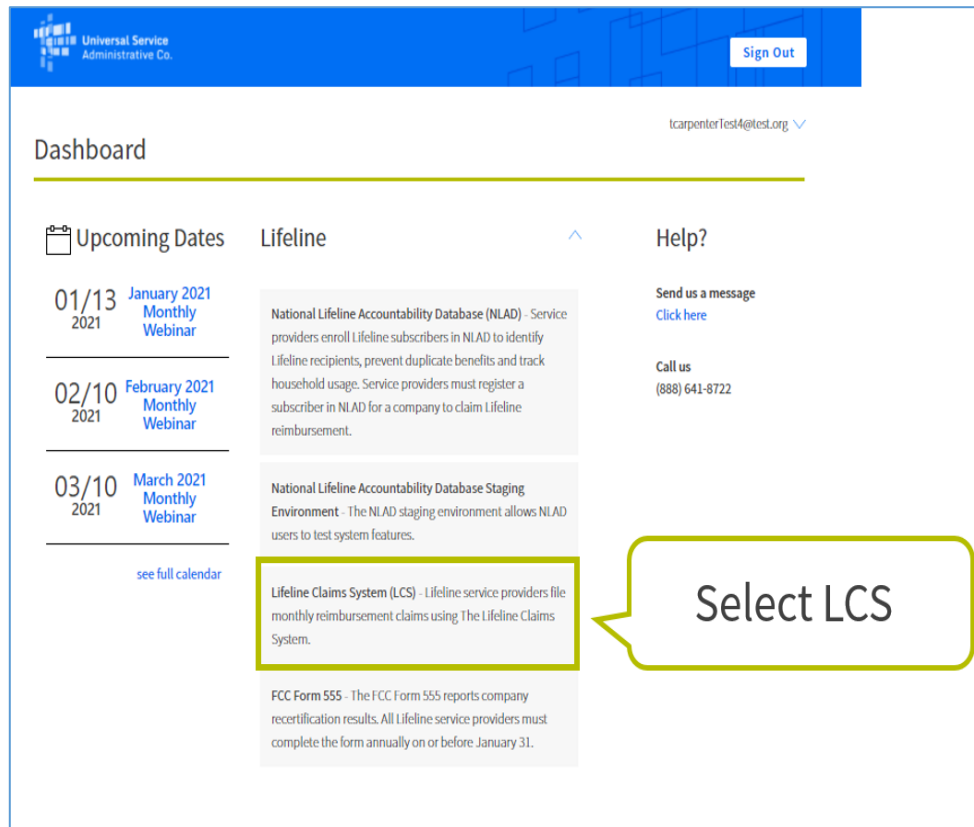
Continued

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.



The screenshot shows the One Portal Dashboard interface. At the top, there is a blue header with the Universal Service Administrative Co. logo and a 'Sign Out' button. Below the header, the user's name 'IcarpenterTest4@test.org' is displayed. The main content area is titled 'Dashboard' and is divided into three columns: 'Upcoming Dates', 'Lifeline', and 'Help?'. The 'Upcoming Dates' column lists three monthly webinars: '01/13 January 2021 Monthly Webinar', '02/10 February 2021 Monthly Webinar', and '03/10 March 2021 Monthly Webinar', with a 'see full calendar' link below. The 'Lifeline' column contains four informational cards: 'National Lifeline Accountability Database (NLAD)', 'National Lifeline Accountability Database Staging Environment', 'Lifeline Claims System (LCS)', and 'FCC Form 555'. The 'Lifeline Claims System (LCS)' card is highlighted with a yellow border and a callout box that says 'Select LCS'. The 'Help?' column includes links for 'Send us a message', 'Click here', and 'Call us (888) 641-8722'.

Continued

Step 1 – Access LCS, Continued

Landing Page Screenshots

LCS Landing Page

USAC Home | Lifeline Program | NLAD | Claims

File or Revise Claim [Opt-Out State File or Revise Claim](#) [Certify Claim](#) [Subscriber SAC Change](#) [Filing History](#)

File or Revise Claim

[Instructions](#)

Select a month to file or revise a claim.

Month	Year	Filing Type
<input type="text" value="Select a Month"/>	<input type="text" value="Select a Year"/>	<input type="text" value="Select Filing Type"/>

© 1997-2020, Universal Service Administrative Company, All Rights Reserved.

877-524-1325 | NLADSupport@usac.org | Website & Privacy Policies | Website Feedback

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



The screenshot shows the NLAD Landing Page with the following sections:

- CLAIMS SYSTEM**: Contains a link to 'Claims'.
- ACCOUNT MANAGEMENT**: Contains links to '497 Officer Home Page' and 'Manage Representative IDs'.
- REPORTS AND TOOLS**: Contains a link to 'Reports'.
- ETC Administrator Entitlements**: A table with columns for User ID, Last Name, First Name, Phone Number, and Role.
- Update ETC Admin SPIN Permissions**: A table with columns for SPIN and Currently assigned.

A callout box with the text "Access claims here" points to the 'Claims' link in the 'CLAIMS SYSTEM' section.

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

Step 2 – Select Data Month to File

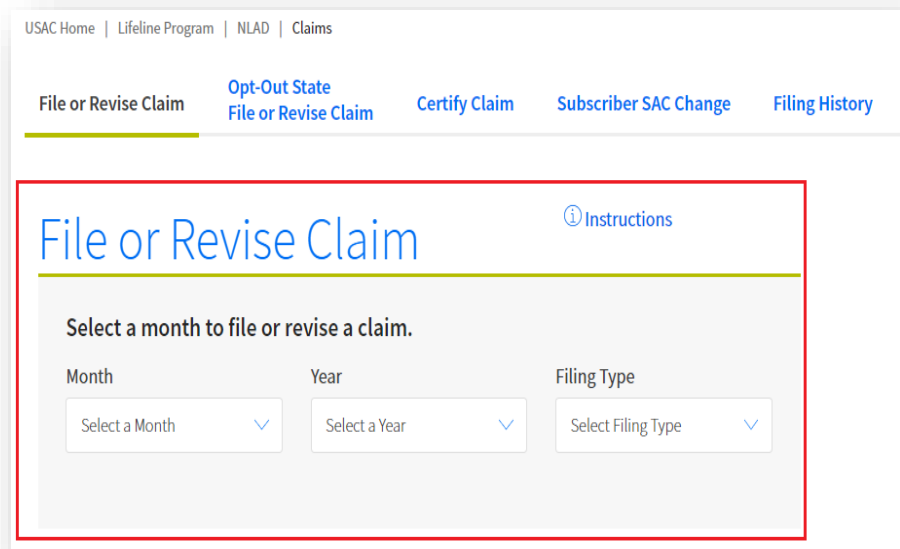
Introduction

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.

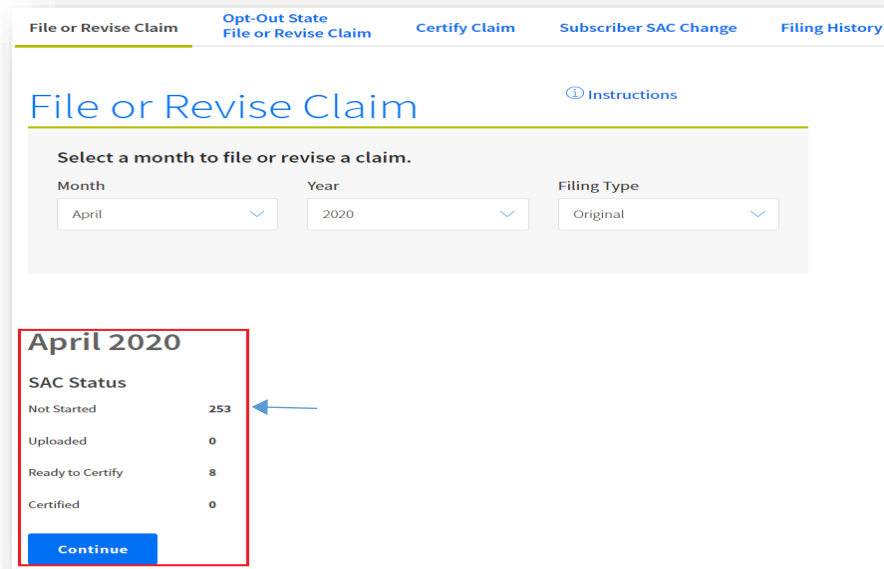
Continued

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



File or Revise Claim | Opt-Out State File or Revise Claim | Certify Claim | Subscriber SAC Change | Filing History

File or Revise Claim [Instructions](#)

Select a month to file or revise a claim.

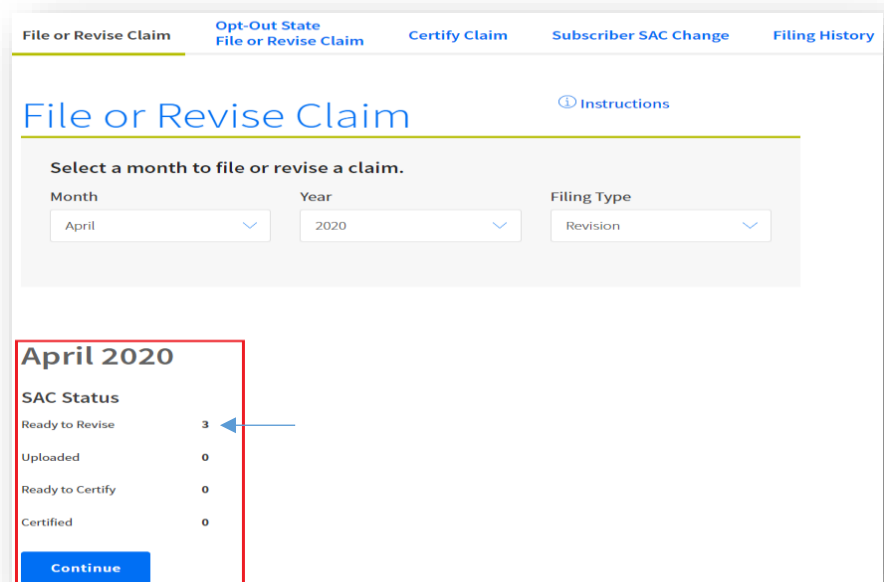
Month: April | Year: 2020 | Filing Type: Original

April 2020

SAC Status	
Not Started	253
Uploaded	0
Ready to Certify	8
Certified	0

[Continue](#)

Filing Type: Revision



File or Revise Claim | Opt-Out State File or Revise Claim | Certify Claim | Subscriber SAC Change | Filing History

File or Revise Claim [Instructions](#)

Select a month to file or revise a claim.

Month: April | Year: 2020 | Filing Type: Revision

April 2020

SAC Status	
Ready to Revise	3
Uploaded	0
Ready to Certify	0
Certified	0

[Continue](#)

Continued

Step 2 – Select Data Month to File, Continued

SAC Status Descriptions

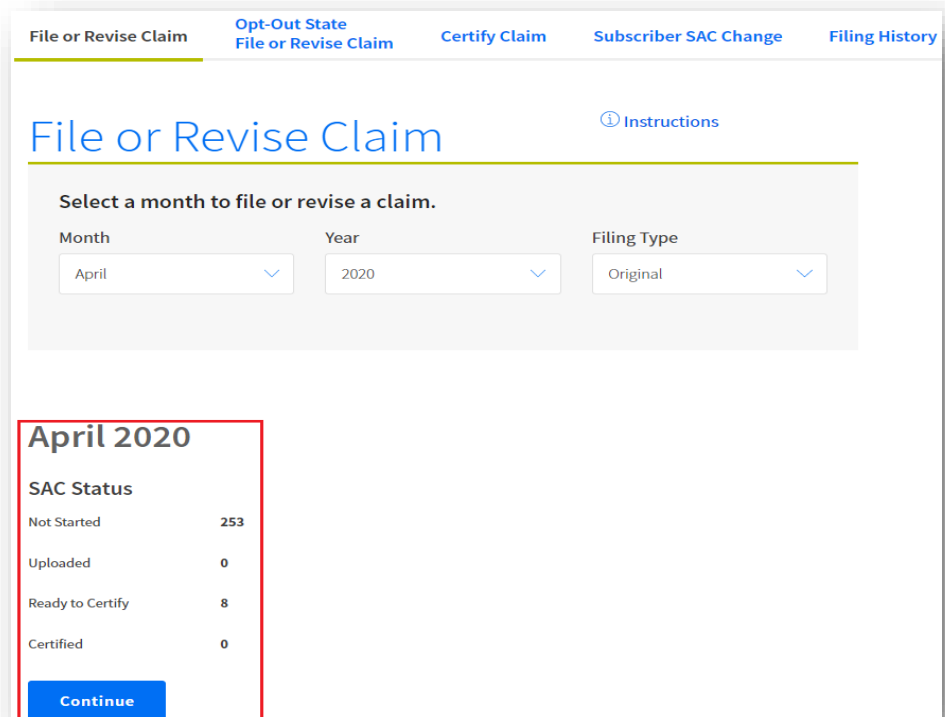
The SAC Status descriptions are below:

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.



File or Revise Claim Opt-Out State File or Revise Claim Certify Claim Subscriber SAC Change Filing History

File or Revise Claim

[Instructions](#)

Select a month to file or revise a claim.

Month: April Year: 2020 Filing Type: Original

April 2020

SAC Status

Not Started	253
Uploaded	0
Ready to Certify	8
Certified	0

[Continue](#)

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

Step 3 – Download Filing Template

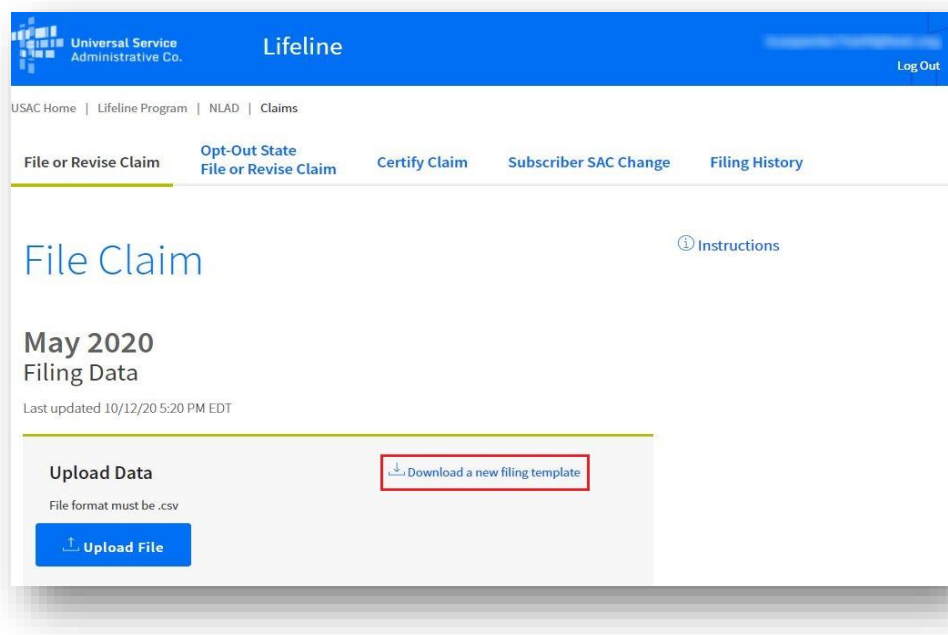
Introduction

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.

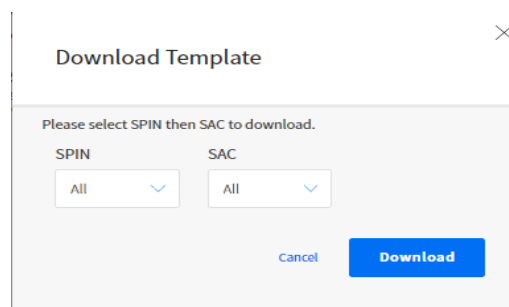
Download Filing Template for an Original Claim

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.

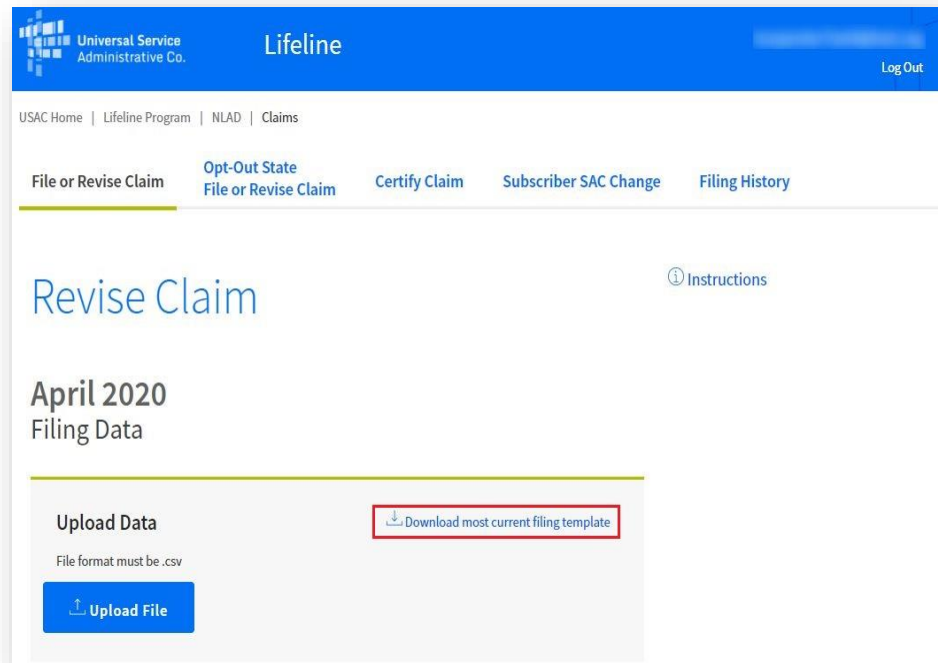


Continued

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.

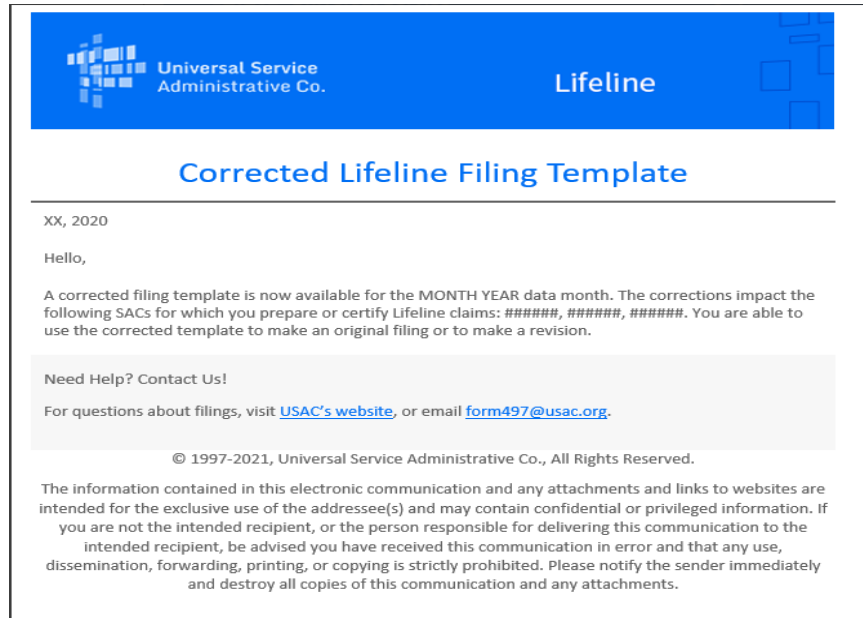
Note: Opt-out State Subscribers enrolled in NLAD (CA broadband-only service type or TX cross-border SACs) will be included on the filing template.

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



The screenshot shows an email notification with a blue header containing the Universal Service Administrative Co. logo and the word "Lifeline". The main heading is "Corrected Lifeline Filing Template". The body of the email includes the following text:

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.

© 1997-2021, Universal Service Administrative Co., All Rights Reserved.

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

File Claim

July 2020 Filing Data

Last updated 11/04/20 1:24 PM EST

Upload Data

File format must be .csv

 Upload File

 Download a new filing template

 Download corrected filing template


Revised Corrected Filing Template:


Revise Claim

February 2019 Filing Data

Upload Data

File format must be .csv

 Upload File

 Download most current filing template

 Download corrected filing template

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

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. <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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

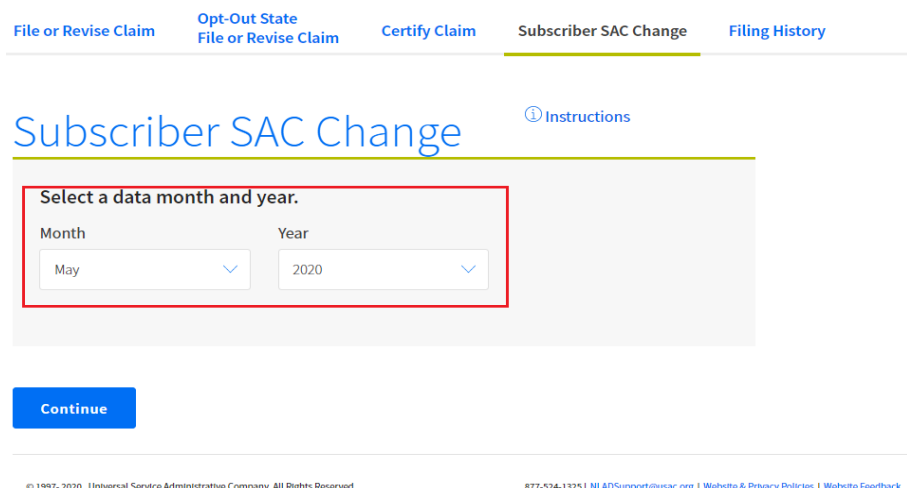
- Service Providers in Oregon (OR) and California (CA) can add and/or update their subscribers Service Types in LCS if needed:
 - In **column O** enter -- voice, broadband, bundledvoice, bundledbroadband, or bundeledvoicebroadband.
 - **Note:** Service Type updates can only be completed for Original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



File or Revise Claim Opt-Out State File or Revise Claim Certify Claim **Subscriber SAC Change** Filing History

Subscriber SAC Change

[Instructions](#)

Select a data month and year.

Month: May Year: 2020

Continue

© 1997-2020, Universal Service Administrative Company, All Rights Reserved. 877-524-1325 | NLADSupport@usac.org | Website & Privacy Policies | Website Feedback

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

Continued

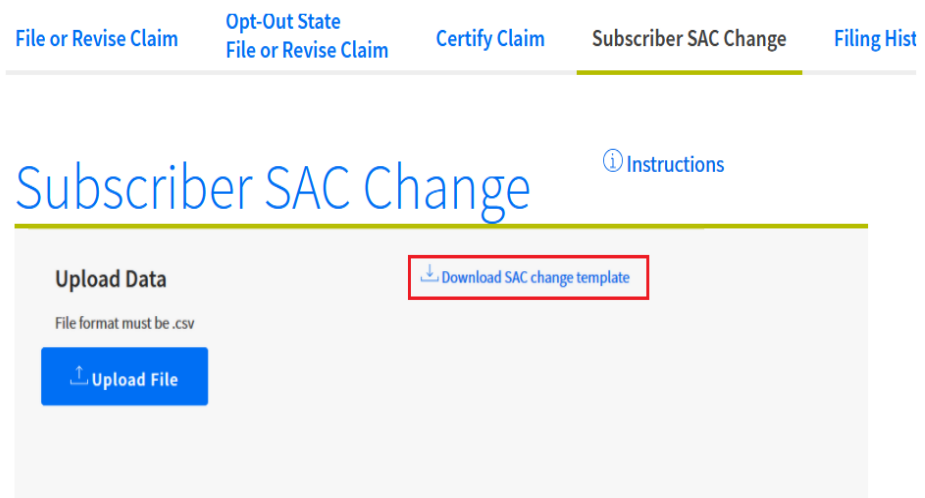
Step 4 – Update Filing Template, Continued

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:

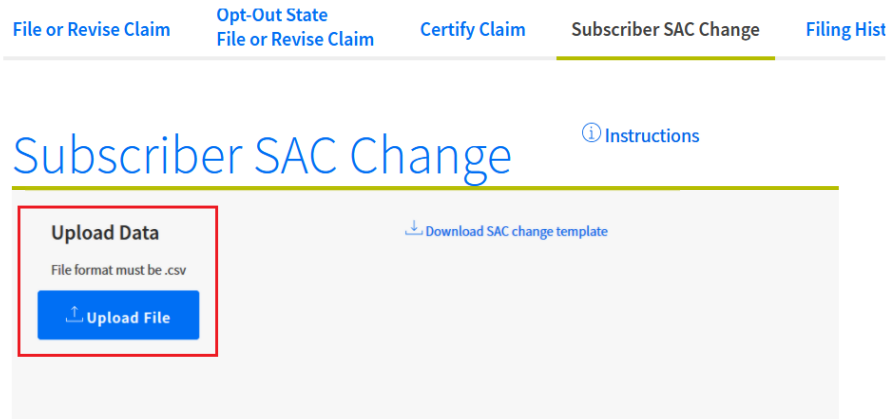
- **Column A – D: No input required; Column E: New SAC entry required**
- The .csv file headers should be listed in that order and all fields are required.
- Service Providers only need to include the subscriber records that are changing SAC(s).

Continue

Step 4 – Update Filing Template, Continued

Upload Subscriber SAC Change Template

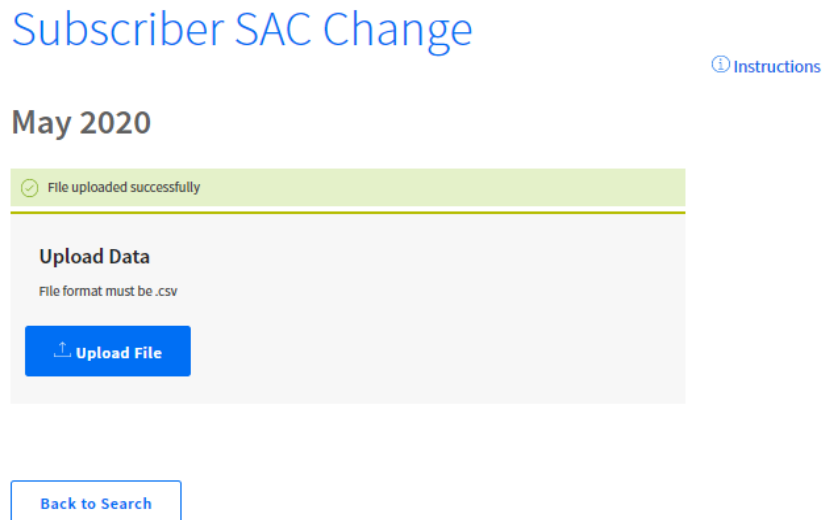
To upload a SAC change template, click on the link **Upload File** located at the top left corner of the **Subscriber SAC Change page** and select the file you saved to upload.



The screenshot shows a navigation bar with the following items: [File or Revise Claim](#), [Opt-Out State File or Revise Claim](#), [Certify Claim](#), [Subscriber SAC Change](#) (highlighted with a green underline), and [Filing Hist](#). Below the navigation bar is the heading "Subscriber SAC Change" with an [Instructions](#) link. The main content area contains a "Download SAC change template" link and a "Upload Data" section. The "Upload Data" section includes the text "File format must be .csv" and a blue "Upload File" button, which is highlighted with a red rectangular box.

SAC Change Successful Upload

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



The screenshot shows the "Subscriber SAC Change" page with an [Instructions](#) link. Below the heading is the date "May 2020". A green notification bar at the top left contains a checkmark icon and the text "File uploaded successfully". Below this is the "Upload Data" section, which includes the text "File format must be .csv" and a blue "Upload File" button. At the bottom of the page is a "Back to Search" button.

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.

! There are errors in the file you last uploaded. Please make necessary changes and upload the file again.
Download the error file: [09_01_2020_1455_error.csv](#)

Upload Data

File format must be .csv



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
yyy	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.

Step 5 – Upload Filing Template

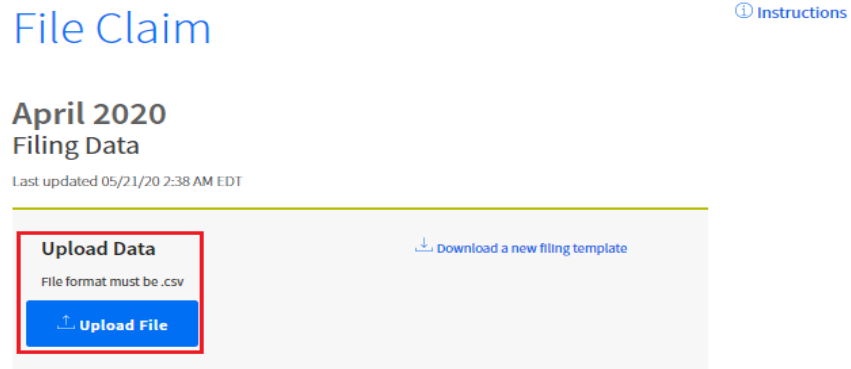
Introduction

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

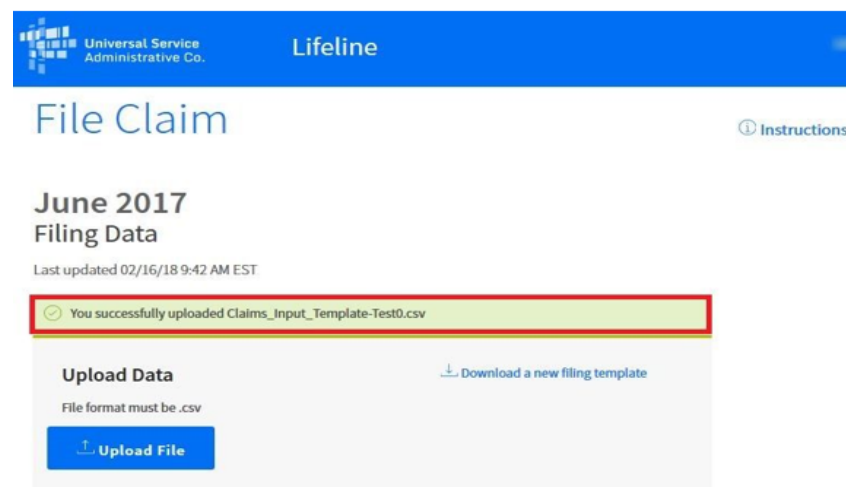
To upload an Original filing template, click on the link **Upload File** located at the top left corner of the **File Claim Page** and select the file you saved to upload.



The screenshot shows the 'File Claim' page for 'April 2020 Filing Data'. At the top right is an 'Instructions' link. Below the title, it says 'Last updated 05/21/20 2:38 AM EDT'. The main content area has a white background with a light blue border. On the left, there is a box titled 'Upload Data' with the text 'File format must be .csv' and a blue 'Upload File' button with an upward arrow icon. On the right, there is a link 'Download a new filing template' with a downward arrow icon.

Successful Upload

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



The screenshot shows the 'File Claim' page for 'June 2017 Filing Data'. At the top right is an 'Instructions' link. Below the title, it says 'Last updated 02/16/18 9:42 AM EST'. A green success notification message is displayed at the top, stating 'You successfully uploaded Claims_Input_Template-Test0.csv', and is highlighted with a red box. Below the notification, the 'Upload Data' section is visible, including the 'Upload File' button and the 'Download a new filing template' link.

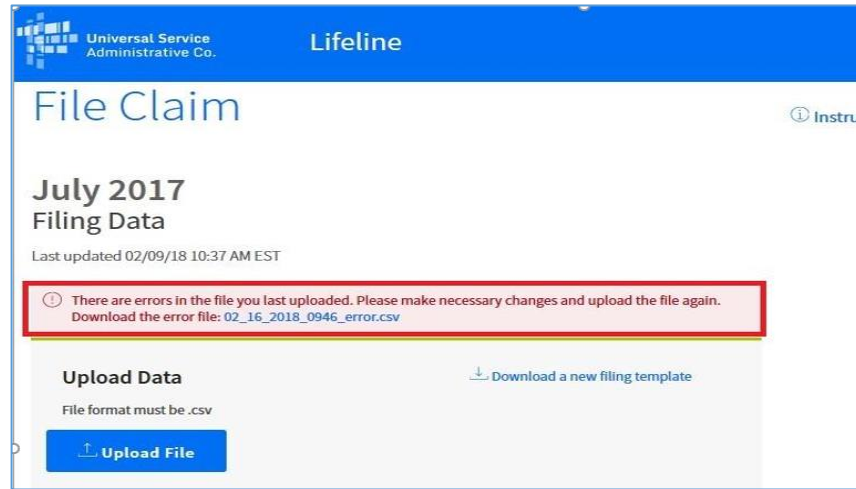
Continued

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
yyy	Year
hh	Hour (24 hour format)
mm	Minutes

Error File Example

rowNumber	subscriberId	errorMessage	errorData
2	1 1GFWTSX94	Rate is required.	null
3	2 NC8468131	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.

Revise Claim

[Instructions](#)

June 2019 Filing Data

Last updated 10/29/20 9:46 PM EDT



Upload Data
File format must be .csv

[Download most current filing template](#)

[Upload File](#)

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
			Not Started	0	0	0	0	0	0	0
			Not Started	0	0	0	0	0	0	0
			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
			Uploaded	10	0	14	0	24	0	0
			Not Started	1	1	5	5	6	6	0
			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 -**

Step 6 – View Support Summary

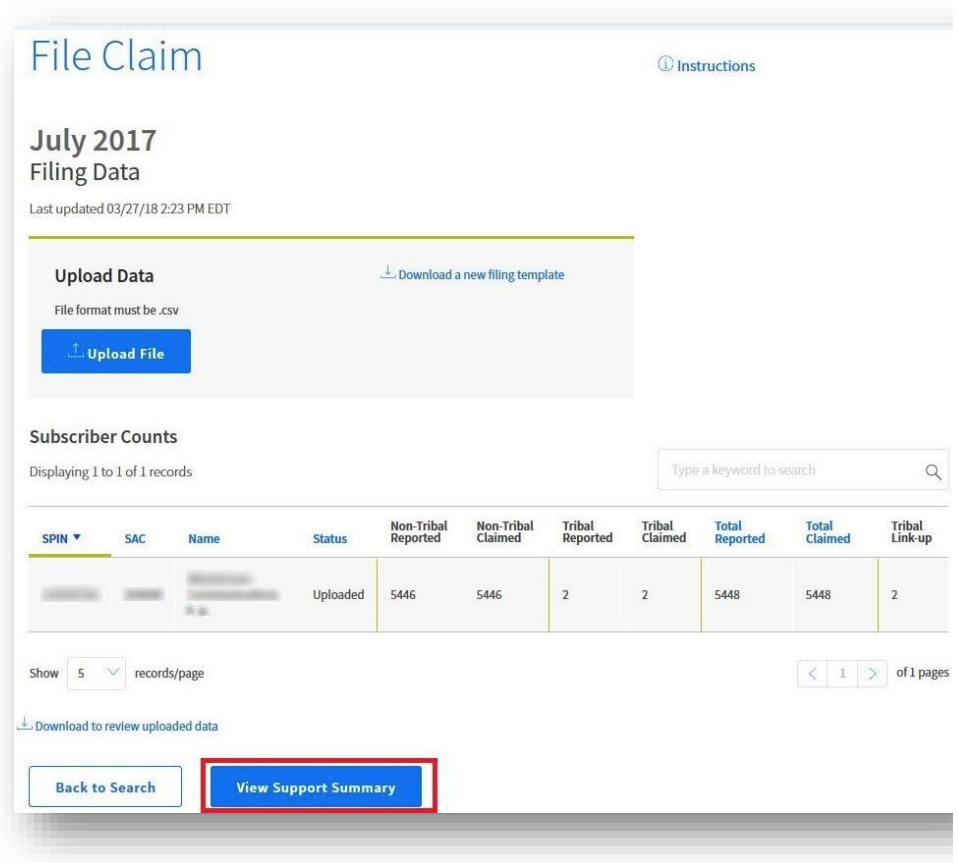
Introduction

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.



File Claim 🔔 Instructions

July 2017
Filing Data
Last updated 03/27/18 2:23 PM EDT

Upload Data 📄 Download a new filing template

File format must be .csv

[📄 Upload File](#)

Subscriber Counts
Displaying 1 to 1 of 1 records

Type a keyword to search 🔍

SPIN	SAC	Name	Status	Non-Tribal Reported	Non-Tribal Claimed	Tribal Reported	Tribal Claimed	Total Reported	Total Claimed	Tribal Link-up
			Uploaded	5446	5446	2	2	5448	5448	2

Show records/page < 1 > of 1 pages

📄 Download to review uploaded data

[Back to Search](#) [View Support Summary](#)

Continued

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.

April 2020 Support Summary

Displaying 1 to 1 of 1 records (filtered from 3 total records)

Select All Filter claims by

Ready to Submit	SPIN	SAC	Name	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]	Uploaded	\$7	\$0	\$7	View

Show records/page < 1 > of 1 pages

Detail View

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

Detail View

SPIN	[REDACTED]	Total Lifeline Support	\$33864
SAC	[REDACTED]	Total Link-up	\$0
Name	[REDACTED]	Total Support	\$33864
Status	Ready to Certify		

Lifeline

Subscriber	Voice			Broadband			Bundled			Total	
	Subscribers	Rate	Subtotal	Subscribers	Rate	Subtotal	Subscribers	Rate	Subtotal	Subscribers	Lifeline Support
Non Tribal	3648	\$9.25	\$33744.00	0	\$0.00	\$0.00	0	\$0.00	\$0.00	3648	\$33744
Tribal	13	\$9.25	\$120.25	0	\$0.00	\$0.00	0	\$0.00	\$0.00	13	\$120

Tribal Link-up

Connections Waived	0
Charges Waived per Connection	\$0.00
Link-up Dollars Waived	\$0

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 -**

Step 7 – Submit Claim(s) for Certification

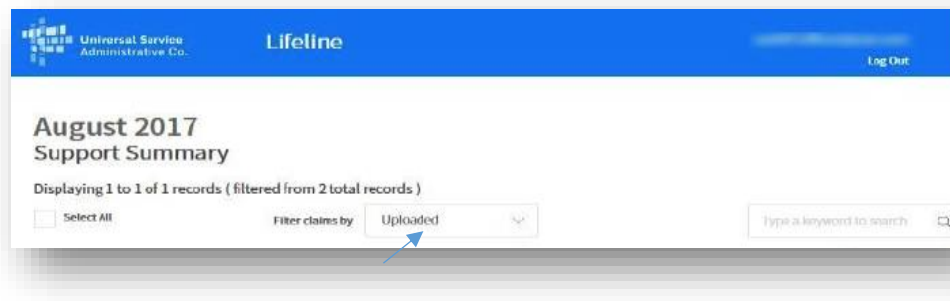
Introduction

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

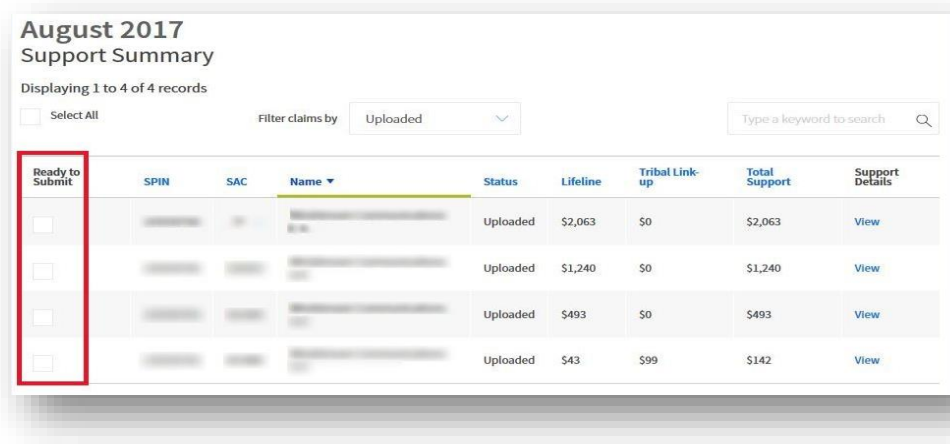
To display the claims that are ready to submit for certification, **Filter claims** by “Uploaded.”



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.



Ready to Submit	SPIN	SAC	Name	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input type="checkbox"/>				Uploaded	\$2,063	\$0	\$2,063	View
<input type="checkbox"/>				Uploaded	\$1,240	\$0	\$1,240	View
<input type="checkbox"/>				Uploaded	\$493	\$0	\$493	View
<input type="checkbox"/>				Uploaded	\$43	\$99	\$142	View

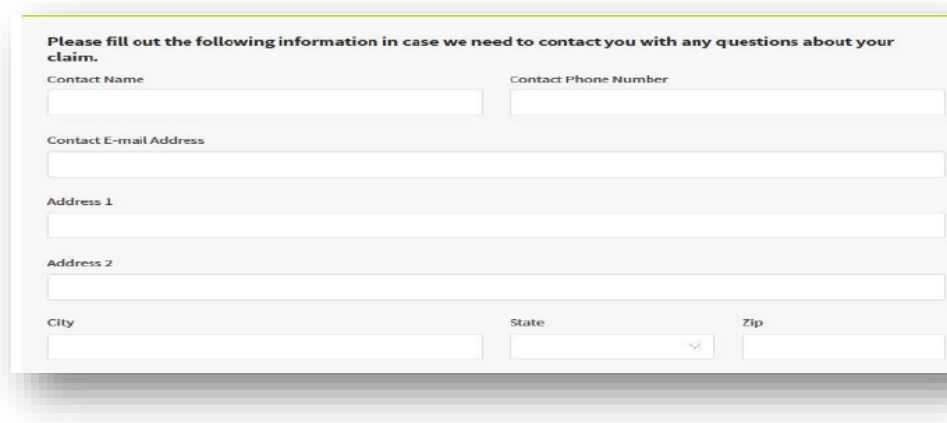
Continued

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.

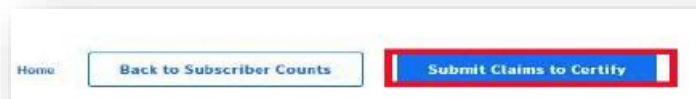


Please fill out the following information in case we need to contact you with any questions about your claim.

Contact Name	Contact Phone Number	
<input type="text"/>	<input type="text"/>	
Contact E-mail Address		
<input type="text"/>		
Address 1		
<input type="text"/>		
Address 2		
<input type="text"/>		
City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>

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)

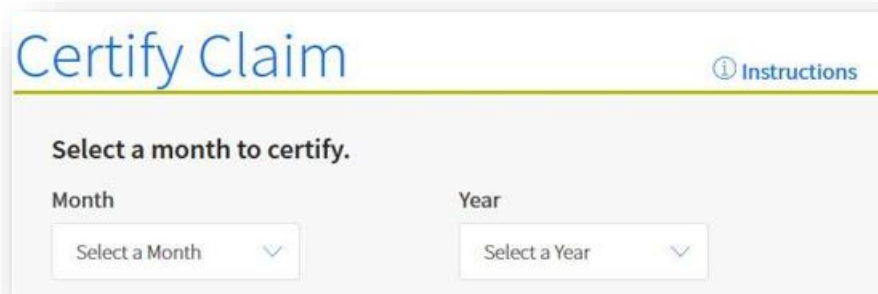
Step 8 – Certify Claim(s)

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.



Certify Claim Instructions

Select a month to certify.

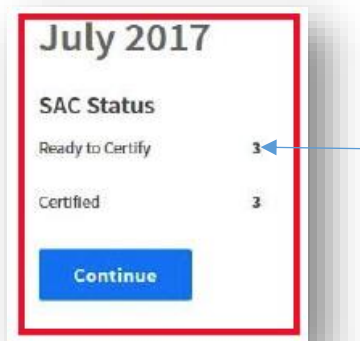
Month Year

Select a Month Select a Year

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.



July 2017

SAC Status

Ready to Certify	3
Certified	3

Continue

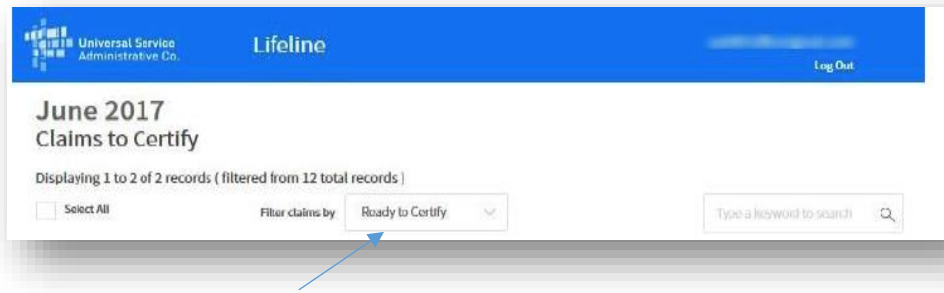
To begin certifying claim(s), click on **Continue** at the bottom of the page.

Continued

Step 8 – Certify Claim(s), Continued

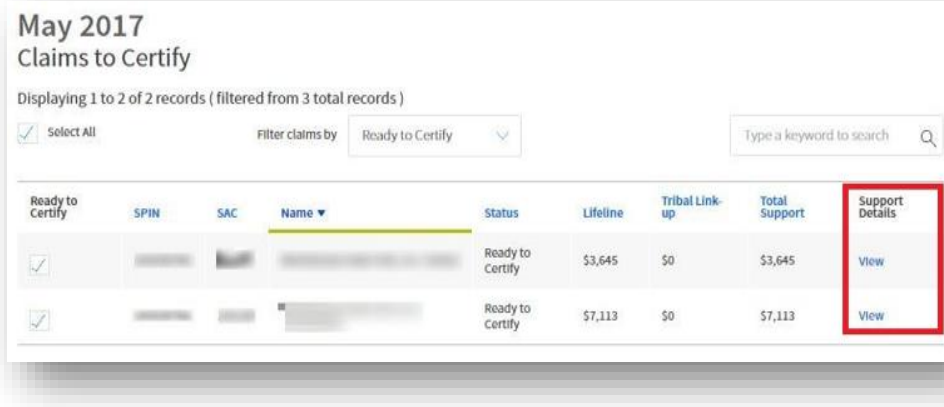
Filter Claims

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.



The screenshot shows the 'Lifeline' dashboard for May 2017. The page title is 'May 2017 Claims to Certify'. Below the title, it says 'Displaying 1 to 2 of 2 records (filtered from 3 total records)'. There is a 'Select All' checkbox and a 'Filter claims by' dropdown menu currently set to 'Ready to Certify'. A search bar is also visible on the right.

Ready to Certify	SPIN	SAC	Name	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input checked="" type="checkbox"/>				Ready to certify	\$3,645	\$0	\$3,645	View
<input checked="" type="checkbox"/>				Ready to certify	\$7,113	\$0	\$7,113	View

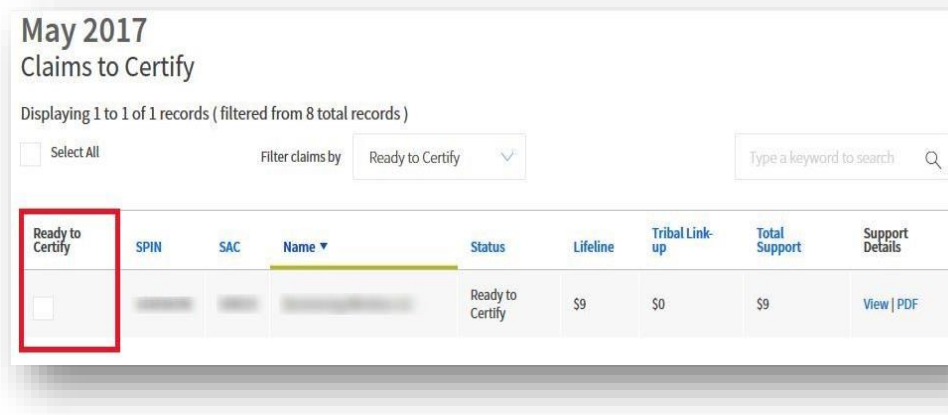
Continued

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.



May 2017
Claims to Certify

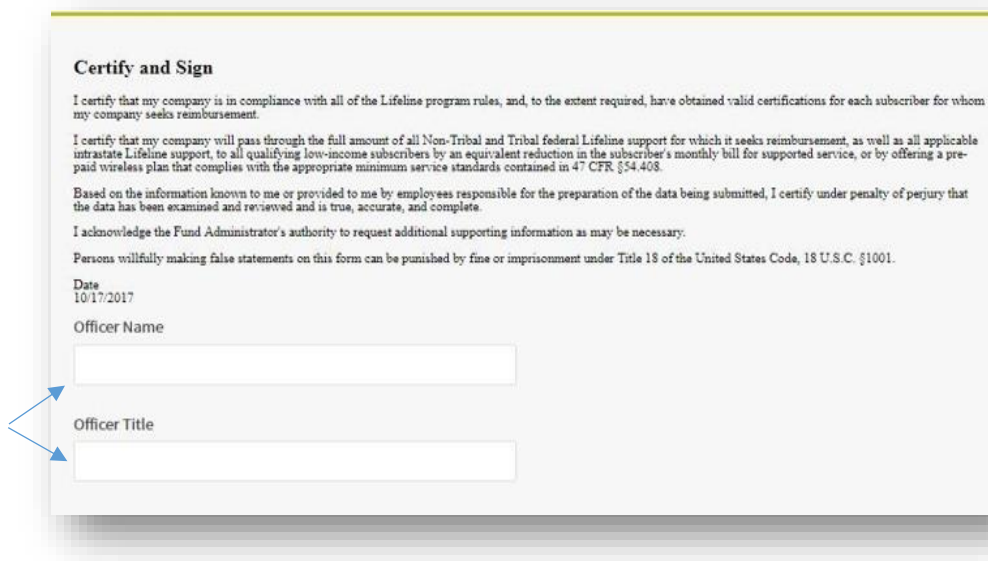
Displaying 1 to 1 of 1 records (filtered from 8 total records)

Select All Filter claims by: Ready to Certify Type a keyword to search

Ready to Certify	SPIN	SAC	Name	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input type="checkbox"/>				Ready to Certify	\$9	\$0	\$9	View PDF

Certify and Sign

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



Certify and Sign

I certify that my company is in compliance with all of the Lifeline program rules, and, to the extent required, have obtained valid certifications for each subscriber for whom my company seeks reimbursement.

I certify that my company will pass through the full amount of all Non-Tribal and Tribal federal Lifeline support for which it seeks reimbursement, as well as all applicable intrastate Lifeline support, to all qualifying low-income subscribers by an equivalent reduction in the subscriber's monthly bill for supported service, or by offering a pre-paid wireless plan that complies with the appropriate minimum service standards contained in 47 CFR §54.408.

Based on the information known to me or provided to me by employees responsible for the preparation of the data being submitted, I certify under penalty of perjury that the data has been examined and reviewed and is true, accurate, and complete.

I acknowledge the Fund Administrator's authority to request additional supporting information as may be necessary.

Persons willfully making false statements on this form can be punished by fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. §1001.

Date
10/17/2017

Officer Name

Officer Title

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.

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:

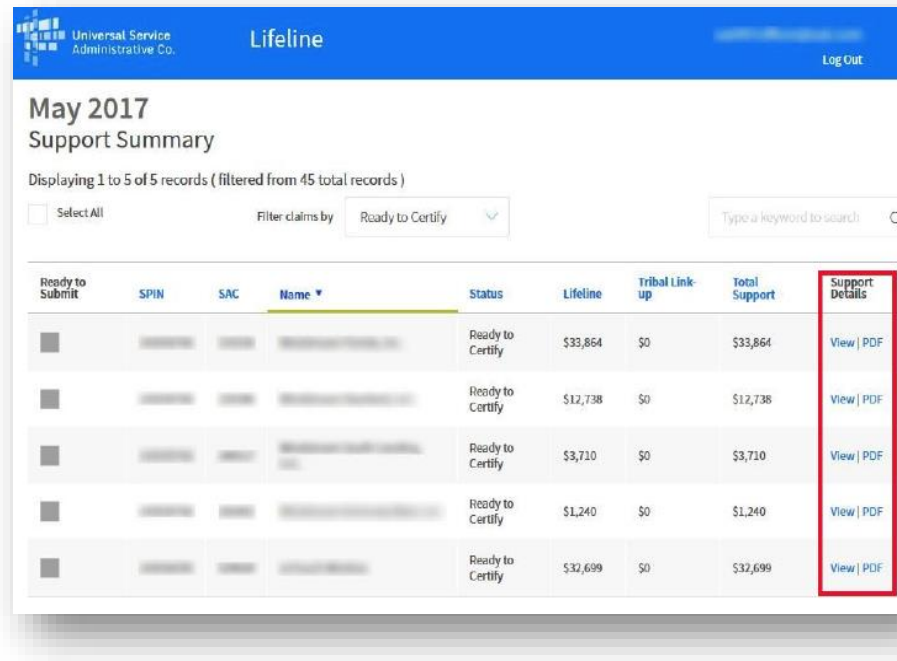
- Ready to Certify
- Certified

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



Universal Service Administrative Co. Lifeline Log Out

May 2017 Support Summary

Displaying 1 to 5 of 5 records (filtered from 45 total records)

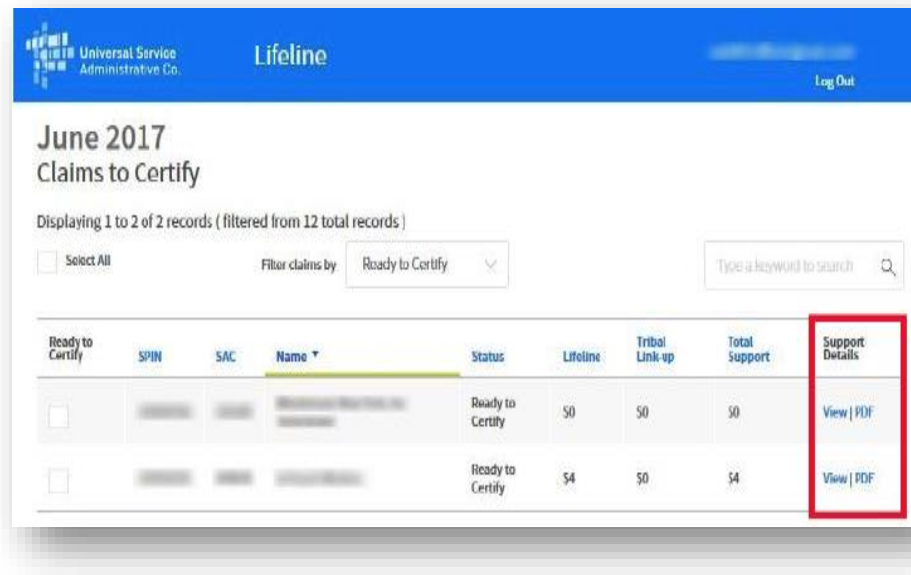
Select All Filter claims by Ready to Certify

Ready to Submit	SPIN	SAC	Name	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input type="checkbox"/>	123456	7890	XXXXXXXXXX	Ready to Certify	\$33,864	\$0	\$33,864	View PDF
<input type="checkbox"/>	123456	7890	XXXXXXXXXX	Ready to Certify	\$12,738	\$0	\$12,738	View PDF
<input type="checkbox"/>	123456	7890	XXXXXXXXXX	Ready to Certify	\$3,710	\$0	\$3,710	View PDF
<input type="checkbox"/>	123456	7890	XXXXXXXXXX	Ready to Certify	\$1,240	\$0	\$1,240	View PDF
<input type="checkbox"/>	123456	7890	XXXXXXXXXX	Ready to Certify	\$32,699	\$0	\$32,699	View PDF

Continued

View and Download PDFs during Claim Submission Process, Continued

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



Universal Service Administrative Co. Lifeline Log Out

June 2017
Claims to Certify

Displaying 1 to 2 of 2 records (filtered from 12 total records)

Select All Filter claims by Ready to Certify Type a keyword to search

Ready to Certify	SPIN	SAC	Name *	Status	Lifeline	Tribal Link-up	Total Support	Support Details
<input type="checkbox"/>				Ready to Certify	50	50	50	View PDF
<input type="checkbox"/>				Ready to Certify	54	50	54	View PDF

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.

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

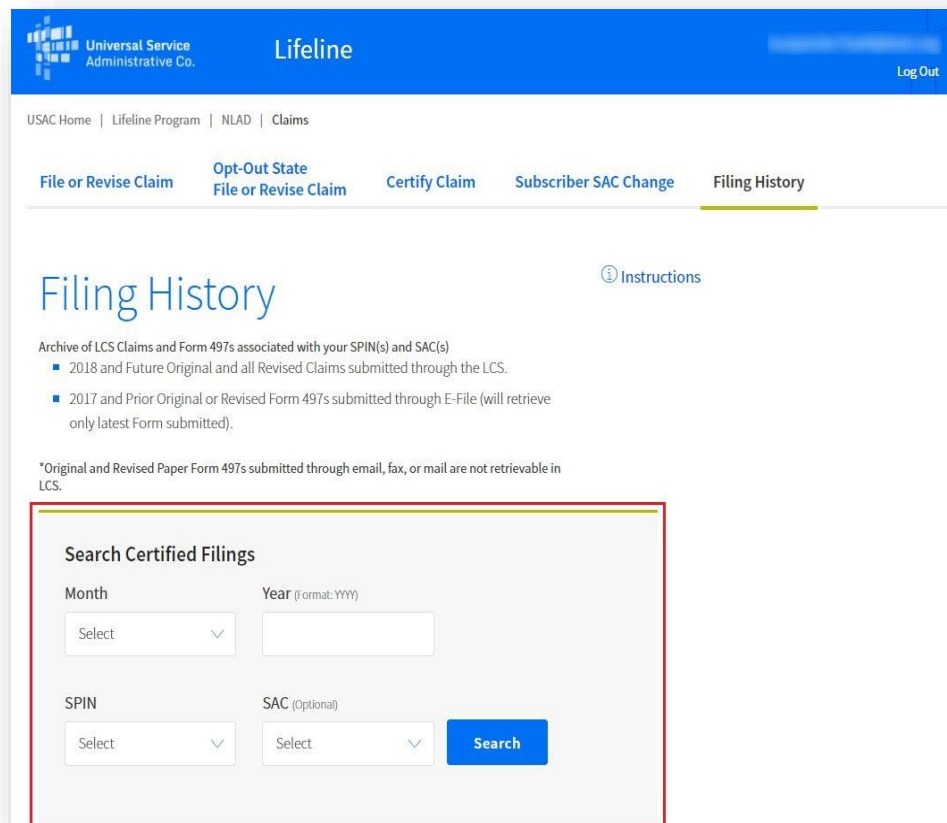
Filing History, Continued

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)



Universal Service Administrative Co. Lifeline Log Out

USAC Home | Lifeline Program | NLAD | Claims

File or Revise Claim Opt-Out State File or Revise Claim Certify Claim Subscriber SAC Change **Filing History**

Filing History

[Instructions](#)

Archive of LCS Claims and Form 497s associated with your SPIN(s) and SAC(s)

- 2018 and Future Original and all Revised Claims submitted through the LCS.
- 2017 and Prior Original or Revised Form 497s submitted through E-File (will retrieve only latest Form submitted).

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

Search Certified Filings

Month	Year (Format: YYYY)
Select	
SPIN	SAC (Optional)
Select	Select

Search

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.

Search Certified Filings

Month

January
▼

Year (Format: YYYY)

2018

SPIN

Select
▼

SAC (Optional)

Select
▼

Search

Displaying 1 to 10 of 44 records

SPIN	SAC ▲	Name	Date Certified	Most Current PDF	Additional Filings
XXXXXXXXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX	03/31/2018	↓	Hide 2 ▼
XXXXXXXXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX	02/28/2018	↓	
XXXXXXXXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX	02/12/2018	↓	
XXXXXXXXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX	03/31/2018	↓	View 1 ▼
XXXXXXXXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX	03/31/2018	↓	View 1 ▼

Show 10 records/page
1

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.

Search Certified Filings

Month

October
▼

Year (Format: YYYY)

2017

SPIN

Select
▼

SAC (Optional)

Select
▼

Search

Displaying 1 to 10 of 42 records

SPIN	SAC	Name	Date Certified ▲	Most Current PDF	Additional Filings
████████	██████	██████████████	11/08/2017	↓	NA
████████	██████	██████████████	11/08/2017	↓	NA
████████	██████	██████████████	12/21/2017	↓	NA
████████	██████	██████████████	12/21/2017	↓	NA
████████	██████	██████████████	12/21/2017	↓	NA

Show 10 records/page

<
1
>
of 5 page

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.
