



State of Utah

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Governor

GREG BELL  
Lieutenant Governor

Public Service Commission

TED BOYER  
*Chairman*

RIC CAMPBELL  
*Commissioner*

RON ALLEN  
*Commissioner*

November 16, 2012

RE: State of Utah Lifeline (UTAP) Program  
Docket No. 10-2528-01

Dear Interested Parties:

Thank you for your participation in this docket. The Utah Public Service Commission appreciates your input in the State of Utah Lifeline (UTAP) Program. Please find attached the final draft for your reference. We now intend to forward this summary to the Division of Workforce Services (“DWS”), which we anticipate will generate a formal proposal from DWS which we will then entertain provided the terms are acceptable.

If you have any questions, please contact me at 801-530-6716 or [gwiderburg@utah.gov](mailto:gwiderburg@utah.gov).

Sincerely,

/s/ Gary L. Widerburg  
Commission Secretary

D#238672

**State of Utah  
Lifeline (UTAP) Program**

**Division of Public Utilities  
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**Table of Contents**

**Program Vision ..... 3**

**Requirements of the Proposal ..... 3**

**Transition of Current Lifeline Participants ..... 4**

**De-enrollment ..... 5**

**Resolution Process for Lifeline Participants ..... 5**

**New Applicants ..... 6**

**Definitions ..... 7**

**Determining a “Household” ..... 9**

**Communication with Telecommunications Carriers.....9**

**National Lifeline Accountability Database (NLAD).....10**

**Communication with Consumers and Telecommunications Carriers..... 11**

**Costs of the Program ..... 11**

**DWS Lifeline Database ..... 12**

**Annual Recertification Program .....13**

**Lifeline Application Certification Form ..... 13**

**Expansion of the Lifeline Program ..... 15**

**Lifeline Household Worksheet ..... 16**

## **Program Vision**

The mission of the Lifeline (UTAP) Program is to provide low income consumers with a federal and/or state discount for telecommunication services. Currently, there are 20,000 wire line customers receiving both a \$9.25 federal discount and a \$3.50 state discount for landline phone service. As of July 1, 2012 there are 24,000 residents receiving a \$9.25 federal discount for their cell phone service. The Utah Public Service Commission (“PSC”) contract with the Department of Workforce Services (“DWS”) provides initial eligibility and annual certification for wire line customers. Wireless customers certify with their telecommunications provider.

The first objective of this proposal is expanding the contract with DWS to process initial eligibility and annual certification for all telecommunications services (wire line and wireless) offered under the Lifeline Program.

The second objective is to have the contract with DWS meet the requirements of the Federal Communications Commission (“FCC”) Lifeline Reform Order issued February 6, 2012.

The third objective is to continue to have the Lifeline Program be as efficient and streamlined as possible, eliminating redundancy of information storage, reducing on-going costs and providing maximum protection of confidential consumer information.

The fourth objective is to offer potential participants the opportunity to enroll in the Lifeline Program when they enroll in other qualifying programs - similar to what is currently done with the HEAT program. .

## **Requirements of the Proposal**

To date, the PSC has approved 19 wire line and 4 wireless telecommunications carriers. Many more wireless providers have applied for approval to operate as an ETC for Lifeline customers in the state of Utah. A household is not permitted to receive Lifeline assistance from multiple telephone providers. This includes both wireless and wireline providers. Currently some Lifeline providers participate only in the federal program and hence only offer their customers the federal discount. In order to meet the new FCC requirement of Title 47, Part 54, Subpart E, the PSC and DWS will move the Lifeline application and recertification processes into the DWS eREP system. The requirements set forth herein address the current participants’ transition into eREP, new applicants, de-enrollment of participants, FCC definitions, telecommunication company communication, annual recertification process, and interaction with the National Lifeline Accountability Database.

## **Transition of Current Lifeline Participants**

The FCC requires that all current participants receiving Lifeline as of June 1, 2012 be recertified for eligibility by December 31, 2012. Verification of continued eligibility must be determined by accessing the DWS database. Those participants who cannot be verified as eligible because they are not in the database must be notified and given an opportunity to re-apply by completing an application and certification form if they believe they are eligible. The Division of Public Utilities (“DPU”) has received from most telecommunications carriers a file with the information regarding each participant. Some of the information is incomplete. The information provided by the telecommunications carriers to the DPU must contain the following:

- Participant’s full name
- Participant’s residential address
- Participant’s billing address
- Participant’s date of birth
- Participant’s full social security number
- Participant’s telecommunications carrier
- Participant’s telephone number for discount

**Participants with Incomplete Information:** For those participants whose information is incomplete, DWS will send a letter with the application and certification form to the participant. The DWS and the participant will then follow the Resolution Process set forth below.

**Participants with Complete Information:** For those participants whose information is complete, the DPU will format files to run against the DWS eligibility information to determine if the participants are participating in a public assistance program. After the match process, a file will be provided by DWS to the telecommunications carrier and the DPU denoting which participants are eligible or ineligible. This information will also be used, and stored, internally within DWS. The eligible participants will be loaded into the DWS Lifeline file and connected to eREP. DWS will note in the file that the participant was enrolled prior to June 1, 2012 and does not require a certification form.

**Eligible Participants:** For those participants who are eligible, a letter from DWS will be mailed to the participant stating that the participant continues to meet the eligibility requirement for the Lifeline discount. Additional information will be provided, reminding participants that if their current information changes they must notify DWS immediately to determine continued eligibility or they risk de-enrollment, and that they can access and edit their information in their MyCASE account on-line through the DWS. The letter will also include basic information regarding the program, including the requirement that only one discount is allowed per household.

**Ineligible Participants:** For those participants who are ineligible (from either a programmatic or an income perspective), DWS will send a letter to the participant notifying him or her that the current information shows they are not eligible for the Lifeline discount and providing information regarding the Lifeline appeals process and application and certification form for participants to reapply if the respective participant's information has changed. The participant must then follow the Resolution Process set forth below.

## De-enrollment

There are a number of reasons a participant can be de-enrolled. They include:

- a) a participant requests to de-enroll from one telecommunications carrier, so participant can apply the Lifeline discount to another telecommunications carrier's service;
- b) participant's discontinuance of eligibility from a public assistance program or income criteria;
- c) participant's duplicative Lifeline benefit from another carrier or another member of participant's household is receiving the Lifeline benefit;
- d) participant's discontinuance for non-usage of the telecommunications service;
- e) participant's failure to re-certify annually, or as required through participant's public assistance program;
- f) participant's service disconnection;
- g) participant's use of a temporary address.

The Resolution Process set forth below will be followed by notifying the participant of the situation and allowing the participant to respond within the allowed time frames.

## Resolution Process for Lifeline Participants

The FCC Reform Order has a de-enrollment process under § 54.405 (e) which allows the participant 30 days to demonstrate eligibility. The FCC requires that if a state has a dispute resolution process to terminate Lifeline, it must comply with the state requirements. The Utah rule allows for a resolution period with a 60-day notification period and an appeals process where the participant will continue to receive a discount until eligibility or ineligibility is determined.

When information is received from a participant, the telecommunications carrier, DWS or another source that eligibility is in question, DWS will notify the participant, through email and letter sent via U.S. Mail, that the participant has 40 days to demonstrate his or her eligibility. The notification shall include an application, certification form to reapply, and information regarding the appeals process.

If an appeal request is not received from a participant within 10 days of the notification letter date, or a response demonstrating eligibility is not received from the participant within 40

days, another letter will be sent via U.S. Mail notifying the participant of de-enrollment effective 20 days from the date of the letter, if the application and certification form and required documentation are not received within 10 days from the date of the letter.

If an applicant appeals within 10 days of the date of the first or second letter, the DPU will review the appeal and contact the participant for resolution. If no resolution is made and it is determined that the participant is not eligible, notification will be made to the participant, DWS and the telecommunications carrier to terminate the discount immediately.

If no appeal is made, the DPU will notify the telephone carrier, the participant, and the National Lifeline Accountability Database within one business day of the eligibility determination date to remove the discount effective immediately for that month and going forward.

### New Applicants

New applicants can apply through a paper application or on-line through the DWS MyCASE login.

**Paper Application:** A paper application and certification form can be obtained from the [www.publicutilities.utah.gov](http://www.publicutilities.utah.gov) website link, or by calling the DPU, DWS, or a telephone carrier who will mail a paper application and certification form to the consumer. The applicant must complete the application and certification form and return it to DWS for processing. The application information will be manually entered into the eREP system and scanned as a pdf document for view by authorized individuals. Authorized individuals include the telephone carrier and/or its designee, PSC, DPU, DWS, USAC auditors, state auditors, and the applicant.

**Approved applications:** If the application is approved, notification will be provided to the applicant, the telephone carrier, and the National Lifeline Accountability database within 10 days.

**Denied applications:** If the application is denied, DWS will send a letter via U.S. Mail notifying the applicant that the applicant is ineligible, together with information regarding the requirements of the program and the appeals process.

**MyCASE:** Consumers who have a MyCASE account with DWS may apply on-line in the same manner provided for in other public assistance programs. Questions asking the information on the application certification form will be prompted to the applicant and an electronic acknowledgement is required for each certification statement. A document similar to the paper application will be generated with all the completed information for storage in the DWS database.

DWS must recertify applicants with a temporary residential address every 90 days.

The system must be capable of allowing applicants to qualify whether or not they currently have telecommunications service. DWS will maintain copies of completed and verified forms. After the applicant obtains telephone service, the applicant will notify DWS that they have obtained service, and identify their chosen carrier. DWS will then notify the carrier that the applicant qualifies for the Lifeline discount through the normal carrier notification process.

## Definitions

The following are definitions issued by the FCC in the Lifeline Reform Order, which apply to the Lifeline Program:

(a) *Qualifying low-income consumer.* A “qualifying low-income consumer” is a consumer, who meets the qualifications for Lifeline,

(1) A consumer’s household income, as defined below, must be at or below 135% of the Federal Poverty Guidelines for a household of that size; or

(2) The consumer, one or more of the consumer’s dependents, or the consumer’s household must receive benefits from one of the following federal assistance programs: Medicaid; Supplemental Nutrition Assistance Program; Supplemental Security Income; Federal Public Housing Assistance (Section 8); Low-Income Home Energy Assistance Program; National School Lunch Program’s free lunch program; or Temporary Assistance for Needy Families; or

(3) The consumer meets additional eligibility criteria established by a state for its residents, provided that such-state specific criteria are based solely on income or other factors directly related to income.

(4) A consumer who lives on Tribal lands is eligible for Lifeline service as a “qualifying low-income consumer” as defined below and as an “eligible resident of Tribal lands” as defined by § 54.400(e) if that consumer meets the qualifications for Lifeline specified in paragraph (a) of this section or if the consumer, one or more of the consumer’s dependents, or the consumer’s household participates in one of the following Tribal-specific federal assistance programs: Bureau of Indian Affairs general assistance; Tribally administered Temporary Assistance for Needy Families; Head Start (only those households meeting its income qualifying standard); or the Food Distribution Program on Indian Reservations.

(5) In addition to meeting the qualifications provided in paragraph (1) or (2) of this section, in order to constitute a qualifying low-income consumer, a consumer must not already



## Lifeline UTAP Requirements

Docket 10-2528-01

Division of Public Utilities

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be receiving a Lifeline service, and there must not be anyone else in the subscriber's household subscribed to a Lifeline service.

(b) *Toll blocking service.* “Toll blocking service” is a service provided by an eligible telecommunications carrier that lets subscribers elect not to allow the completion of outgoing toll calls from their telecommunications channel.

(c) *Toll control service.* “Toll control service” is a service provided by an eligible telecommunications carrier that allows subscribers to specify a certain amount of toll usage that may be incurred on their telecommunications channel per month or per billing cycle.

(d) *Toll limitation service.* “Toll limitation service” denotes either toll blocking service or toll control service for eligible telecommunications carriers that are incapable of providing both services. For eligible telecommunications carriers that are capable of providing both services, “toll limitation service” denotes both toll blocking service and toll control service.

(e) *Eligible resident of Tribal lands.* An “eligible resident of Tribal lands” is a “qualifying low-income consumer,” as defined in paragraph (a) of this section, living on Tribal lands. For purposes of this subpart, “Tribal lands” include any federally recognized Indian tribe’s reservation, pueblo, or colony, including former reservations in Oklahoma; Alaska Native regions established pursuant to the Alaska Native Claims Settlement Act (85 Stat. 688); Indian allotments; Hawaiian Home Lands—areas held in trust for Native Hawaiians by the state of Hawaii, pursuant to the Hawaiian Homes Commission Act, 1920 July 9, 1921, 42 Stat. 108, *et. seq.*, as amended; and any land designated as such by the FCC for purposes of this subpart pursuant to the designation process in § 54.412.

(f) *Income.* “Income” is all income actually received by all members of a household. This includes salary before deductions for taxes, public assistance benefits, social security payments, pensions, unemployment compensation, veteran’s benefits, inheritances, alimony, child support payments, worker’s compensation benefits, gifts, lottery winnings, and the like. The only exceptions are student financial aid, military housing and cost-of-living allowances, irregular income from occasional small jobs such as baby-sitting or lawn mowing, and the like.

(g) *Duplicative support.* “Duplicative support” exists when a Lifeline subscriber is receiving two or more Lifeline services concurrently or two or more subscribers in a household are receiving Lifeline services or Tribal Link Up support concurrently.

(h) *Household.* A “household” is any individual or group of individuals who are living together at the same address as one economic unit. A household may include related and unrelated persons. An “economic unit” consists of all adult individuals contributing to and sharing in the income and expenses of a household. An adult is any person eighteen years or older. If an adult has no or minimal income, and lives with someone who provides financial support to him/her, both people shall be considered part of the same household. Children under the age of eighteen

living with their parents or guardians are considered to be part of the same household as their parents or guardians.

(i) *National Lifeline Accountability Database or Database.* The “National Lifeline Accountability Database” or “Database” is an electronic system, with associated functions, processes, policies and procedures, to facilitate the detection and elimination of duplicative support, as directed by the FCC.

(j) *Qualifying assistance program.* A “qualifying assistance program” means any of the federal, state, or Tribal assistance programs participation in which, pursuant to § 54.409(a) or (b), qualifies a consumer for Lifeline service, including Medicaid; Supplemental Nutrition Assistance Program; Supplemental Security Income; Federal Public Housing Assistance (Section 8); Low-Income Home Energy Assistance Program; National School Lunch Program’s free lunch program; Temporary Assistance for Needy Families; Bureau of Indian Affairs general assistance; Tribally administered Temporary Assistance for Needy Families (Tribal TANF); Head Start (only those households meeting its income qualifying standard); or the Food Distribution Program on Indian Reservations (FDPIR), and with respect to the residents of any particular state, any other program so designated by that state pursuant to § 54.409(a).

## Determining a “Household”

As required by paragraphs 78-79 of the Lifeline Modernization Order (located at <http://www.fcc.gov/document/fcc-reforms-modernizes-lifeline-program-low-income-americans-0%0A>), the Universal Service Administrative Company has developed the attached worksheet to assist carriers and consumers in determining whether more than one household exists at a single address. The worksheet must be completed any time there is more than one application per residential address. Upon receiving an application the DWS will check for address duplication. In the event of address duplication, the applicant must fill out the worksheet as part of the application process.

## Communication with Telecommunications Carriers

The PSC will need to receive a waiver of the requirement to provide a hard copy of the application and certification forms from the FCC with the understanding that the information will be safeguarded and maintained on behalf of the telecommunication carriers. The PSC will also need to receive a waiver of the requirement to provide a hard copy of any documentation related to the annual recertification of Lifeline customers.

In order to provide the telecommunication carriers with access to applicants’ and participants’ information, a portal, consistent with an agreement between DWS and the telecommunications carriers, will be established. This portal will provide the telecommunications carriers with access to their respective applicants’ or participants’

information and enable the carriers to view the applications and certification forms for reimbursement and all required audit purposes. The portal will be provided through the eSHARE program with DWS and be capable of providing archived information sufficient to satisfy the federal auditing requirements.

Once an applicant's application and certification form are approved, notification via email will be provided to the telecommunication carrier, the applicant, and the National Lifeline Accountability Database within 10 days. This will allow the telecommunications carrier to apply the full amount of the discount to the applicant's account for the month the applicant is approved. If the applicant is determined to be ineligible, DWS will provide notification to the applicant, the telecommunications carrier, and the National Lifeline Accountability Database within one business day to remove and terminate the discount. Discontinuance of benefits of ineligible applicants will be effective the entire month in which the applicant is de-enrolled.

On the first business day of the month, DWS will provide a written report, or electronic file, to the telecommunications carriers, and the DPU, identifying the telecommunication carrier's participants who are eligible for the discount for the previous month. The information will include full name, telephone number, telephone carrier, street address, city, state, and zip code. It will also provide the total number of participants for whom the telecommunications carrier is eligible to request reimbursement for the federal and state discounts. DWS will also prepare and send a written report, or electronic file, to the telecommunications carriers identifying the same information mentioned above for added and de-enrolled participants for the previous month with participant counts. The telecommunication carrier will use this information to reconcile its information and use it to submit claims to USAC and the DPU for reimbursement. DWS will also provide a disclosure to the telecommunications carriers that application and certification forms are available for "read only" access through DWS' established portal.

Since the telecommunication carrier will be reimbursed for the full amount of the discount for the first month, regardless of the partial service costs for the month, the full amount of the discount must be applied to the participant's account, even if the participant's enrollment date is the last day of the month.

### **National Lifeline Accountability Database (NLAD)**

The DWS shall query the NLAD to determine if a Lifeline benefit is already being supplied to an applicant by another carrier. Likewise, DWS shall transmit information at least every 10 days to the NLAD for new participants, including the following:

- Participant's full name;
- Participant's residential address;
- Participant's date of birth;
- Participant's social security number (last four digits) or tribal identification number;

# Lifeline UTAP Requirements

Docket 10-2528-01

Division of Public Utilities

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- Participant's telephone number;
- Date on which Lifeline service was initiated for participant;
- Date on which Lifeline service was terminated from prior carrier and the name of the carrier, if applicable;
- Dollar amount sought for the discount
- Means through which the consumer qualifies for Lifeline

For de-enrollment, the above information must be supplied to NLAD and the telecommunications carrier within one business day of the termination date.

When a customer disconnects service from the ETC, the ETC must notify DWS within one business day. DWS will then notify NLAD.

## Communication with Consumers and Telecommunications Carriers

Upon integration of the Lifeline Program into the eRep system, DWS will notify participants and prospective applicants and telecommunication carriers of its availability.

The PSC will review existing Utah Admin. Code R746-341 to determine changes to be submitted to rulemaking. Comments on the rule will be made through an open docket and the PSC will amend the rule as appropriate.

## Costs of the Program

Cost for the development of the system and ongoing costs of the system will be funded through the Universal Public Telecommunications Service Support Fund (Fund). The PSC will review the expenses and modify the contract with DWS to include one time and on-going costs. The PSC will review the status of the Fund to determine if a rate increase or an additional fee will be required to fund the on-going costs of the system.

The estimated costs for the program are as follows:

### One Time Billing/Cost

Position	Rate	Hours	Amount
ESD Business Analyst	\$ 60.00	1065	\$ 63,900.00
eREP Programmer	\$100.00	550	\$ 55,000.00
eREP IA	\$ 70.00	375	\$ 26,250.00
myCase Programmer	\$100.00	350	\$ 35,000.00
myCase IA	\$ 70.00	475	\$ 33,250.00

## Lifeline UTAP Requirements

Docket 10-2528-01

Division of Public Utilities

---

Web interface Programmer	\$100.00	550	\$ 55,000.00
Web interface IA	\$ 70.00	420	\$ 29,400.00
<b>Totals</b>		<b>3,785</b>	<b>\$ 297,800.00</b>

### Ongoing Billing/Cost

- To be determined

Lifeline will be incorporated into the overall cost per case associated with DWS current programs. DWS will calculate the complete level of effort, based on operational costs for eligibility staff, as well as unknown technical costs for Web Service communications.

### Time line

To be determined

Estimated time to build is 3-6 months, excluding any unknown issues with Web Service communication with Federal Data Hub.

### Team

Business Analyst: Barbara Hollister  
UAT Coordinator: Barbara Hollister  
IA: TBD  
Developer: TBD

## DWS Lifeline Database

The DWS Lifeline Database will retain all the application information in a relational database along with images of the application certification form and, if applicable, the Lifeline Household Worksheet. The information collected and maintained shall (at least) include:

- Full name
- Residential address
- Billing address
- Date of birth
- Full social security number or tribal identification number
- Telephone number, if provided
- Telephone carrier
- Date Lifeline service was initiated (first day of the approved month)
- Date Lifeline service was terminated (determination date)
- Dollar amount sought for the discount
- Means through which the consumer qualified

All residential address information shall be verified with the U.S. Postal Service. The DWS will add an ETC to the system upon the ETC's approval and direction by the PSC. Similarly, the DWS will delete an ETC from the system upon direction by the PSC.

## Annual Recertification Program

Each year, each participant will be required to recertify eligibility either with the participant's public assistance recertification or on the approved enrollment date. The DWS shall:

- confirm the participant's public assistance or income eligibility;
- notify, as required, participants of the need to complete the certification form and return it to DWS;
- notify the respective telecommunications carrier that the annual recertification has been completed and provide to the carrier the results of those efforts in a format adequate for the carrier to provide FCC reporting in accordance with § 54.410(f);
- maintain the results of the recertification in eSHARE for the telecommunications carrier to access and review for the period the carrier has the participant as its customer. DWS will also need to archive information and make it available to the telecommunications carriers, consistent with FCC audit guidelines, in case of an audit.

## Lifeline Application Certification Form

The certification form shall provide the following notifications:

- Lifeline is a federal benefit. Willfully making false statements to obtain the benefit can result in fines, imprisonment, de-enrollment or being barred from the program;
- Only one Lifeline service is available per household;
- A "household" is defined, for purposes of the Lifeline Program, as any individual or group of individuals who live together at the same address and share income and expenses;
- A household is not permitted to receive Lifeline benefits from multiple providers;
- Violation of the one-per-household limitation constitutes a violation of FCC rules and will result in the subscriber's de-enrollment from the program; and
- Lifeline is a non-transferable benefit. Subscriber may not transfer his or her benefit to any other person.

The certification form must require each participant to provide the following information:

- Full name;
- Full residential address;
- Whether the residential address is permanent or temporary;

## Lifeline UTAP Requirements

Docket 10-2528-01

Division of Public Utilities

---

- Full billing address if different than the residential address;
- Date of birth;
- Full social security number or tribal identification number;
- Name of the public assistance program, if qualifying under this criteria, and name of his or her dependents;
- Number of individuals in his or her household, if qualifying under the income-based criteria; and
- Participant's permission for his/her information to be provided to the Universal Service Administrative Company.

The form must require each participant to certify under penalty of perjury that:

1. The subscriber meets the income-based or program-based eligibility criteria for receiving Lifeline, provided in § 54.409;
2. The subscriber will notify the carrier within 30 days if for any reason he or she no longer satisfies the criteria for receiving Lifeline, including if the subscriber no longer meets the income-based or program-based criteria for receiving Lifeline support; the subscriber is receiving more than one Lifeline benefit; or another member of the subscriber's household is receiving a Lifeline benefit;
3. If the subscriber is seeking to qualify for Lifeline as an eligible resident of Tribal lands, he or she lives on Tribal lands, as defined in § 54.400(e);
4. If the subscriber moves to a new address, he or she will provide that new address to the eligible telecommunications carrier within 30 days;
5. If the subscriber provided a temporary residential address to the eligible telecommunications carrier, he or she will be required to verify his or her temporary residential address every 90 days, otherwise the Resolution Process will be followed;
6. The subscriber's household will receive only one Lifeline service and, to the best of his or her knowledge, the subscriber's household is not already receiving a Lifeline service;
7. The information contained in the subscriber's certification form is true and correct to the best of his or her knowledge;
8. The subscriber acknowledges that providing false or fraudulent information to receive Lifeline benefits is punishable by law; and
9. The subscriber acknowledges that the subscriber may be required to re-certify his or her continued eligibility for Lifeline at any time, and the subscriber's failure to re-certify as

to his or her continued eligibility will result in de-enrollment and the termination of the subscriber's Lifeline benefits pursuant to § 54.405(e)(4).

The applicant shall provide electronic initials/acknowledgement or paper initials for each of the nine statements above.

## **Expansion of the Lifeline Program**

With the Lifeline Program becoming part of the intake program at DWS, low income applicants will have the opportunity to apply each time they qualify for one of the eleven public assistance programs. A pop-up question will appear after the consumer has qualified for a program leading the participant to complete the necessary requirements for a new Lifeline applicant.

In addition, an annual process will be initiated where the Lifeline participant file will be matched against those individuals who have qualified for one of the eleven public assistance programs. A file will be generated of those individuals who have a phone service and qualify for another program. A letter with the certification form will be sent to each individual who qualifies, along with the pop-up question added to their MyCASE profile.



# Lifeline UTAP Requirements

Docket 10-2528-01

Division of Public Utilities

## [Company/Agency Letterhead] Lifeline Household Worksheet

Name	
Address	
Telephone Number	

Lifeline is a government program that provides a monthly discount on home or mobile telephone services. Only ONE Lifeline discount is allowed per household. Members of a household are not permitted to receive Lifeline service from multiple telephone companies.

Your **household** is everyone who lives together at your address as one economic unit (including children and people who are not related to you).

The **adults** you live with are part of your **economic unit** if they contribute to and share in the income and expenses of the household. An **adult** is any person 18 years of age or older, or an emancipated minor (a person under age 18 who is legally considered to be an adult). Household **expenses** include food, health care expenses (such as medical bills) and the cost of renting or paying a mortgage on your place of residence (a house or apartment, for example) and utilities (including water, heat and electricity). **Income** includes salary, public assistance benefits, social security payments, pensions, unemployment compensation, veteran's benefits, inheritances, alimony, child support payments, worker's compensation benefits, gifts, and lottery winnings.

Spouses and domestic partners are considered to be part of the same household. Children under the age of 18 living with their parents or guardians are considered to be part of the same household as their parents or guardians. If an adult has no income, or minimal income, and lives with someone who provides financial support to that adult, both people are considered part of the same household.

***You have been asked to complete this Worksheet because someone else currently receives a Lifeline-supported service at your address. This other person may or may not be a part of your household. Answer the questions below to determine whether there is more than one household residing at your address.***

1. Does your spouse or domestic partner (that is, someone you are married to or in a relationship with) already receive a Lifeline-discounted phone? (*check no if you do not have a spouse or partner*)  **YES**  **NO**

- If you checked **YES**, you may not sign up for Lifeline because someone in your household already receives Lifeline. Only ONE Lifeline discount is allowed per household.
- If you checked **NO**, please answer question #2.

2. Other than a spouse or partner, do other adults (people over the age of 18 or emancipated minors) live with you at your address?

- A. A parent  **YES**  **NO** D. An adult roommate  **YES**  **NO**  
B. An adult son or daughter  **YES**  **NO** E. Other  **YES**  **NO**  
C. Another adult relative (such as a  **YES**  **NO**  
sibling, aunt, cousin,  
grandparent, grandchild, etc.)

- If you checked **NO** for each statement above, you do not need to answer the remaining questions. Please initial line B, below, and sign and date the worksheet.
- If you checked **YES**, please answer question #3.

3. Do you share living expenses (bills, food, etc.) and share income (either your income, the other person's income or both incomes together) with at least one of the adults listed above in question #2?  **YES**  **NO**

- If you checked **NO**, then your address includes **more than one household**. Please initial lines A and B below, and sign and date the worksheet.
- If you checked **YES**, then your address includes only **one household**. You may not sign up for Lifeline because someone in your household already receives Lifeline.

**Lifeline UTAP Requirements**

Docket 10-2528-01

Division of Public Utilities

**CERTIFICATION**

*Please initial the certifications below and sign and date this worksheet. Submit this worksheet to \_\_\_\_\_ [insert company or agency name] along with your Lifeline application.*

- A. \_\_\_\_\_ *I certify that I live at an address occupied by multiple households.*
- B. \_\_\_\_\_ *I understand that violation of the one-per-household requirement is against the Federal Communication Commission's rules and may result in me losing my Lifeline benefits, and potentially, prosecution by the United States government.*

Signature \_\_\_\_\_ Date \_\_\_\_\_