

Helping Keep Americans Connected

The USAC Connection High Cost & Low Income monthly newsletter will give you information about upcoming program deadlines, tips to help you ensure timely and proper filings, and other timely information.

Registration Open for High Cost/Low Income Training Session in Washington, D.C.

USAC is holding a one-day training event **January 29, 2010** in Washington, D.C. for companies that participate in the High Cost and Low Income Programs. The trainings provide guidance on program rules, audits, and support payment calculations. More details on who should attend, topics covered, training registration, and hotel accommodations can be found on the [Washington, D.C. Workshop](#) page.

High Cost & Low Income Programs

Using the E-File System to File High Cost & Low Income Program Forms Online

It's easy to use USAC's online filing portal, the [E-File System](#), to file the [Online Form 497](#) in the Low Income Program and the [Online Form 525](#) for competitive eligible telecommunications carriers (CETCs) in the High Cost Program. USAC has posted [video tutorials](#) about these topics.

The first step for filing either form online is to make sure you have access to E-File with a User ID and password. Then you can set up authorized users in E-File using the Form 498, the *Service Provider Identification Number and General Contact Information Form*. This form is used by USAC to collect contact and remittance information from service providers that receive USF support.

Information Center
- Service Providers
- New Spin
- 498 Bulk Submission
- Schools and Libraries
- 472 Online Bear
- Online Item 21
- High Cost & Low Income
- 497 Online Form
- 525 Online Form
- Pending Certifications
- Form 498
- Download Forms
- Authorized Users
- New User
- Pending Users
- My Account
- Change Password

IMPORTANT DATES

December 30	Line counts due for HCL, LSS, ICLS, HCM as of 6/30/09
December 31	Line Counts due for IAS as of 9/30
December 31	LSS Actual Data for 2008
December 31	ICLS Actual Data for 2008 (Form 509)
January 29	HCLI Workshop, Washington, D.C.

Obtain E-File User ID & Password

Carriers whose Forms 498 have not been updated since October 2005 do not have access to E-File and must submit a new Form 498 complete with signature page to create an E-File account.

You can fill out a PDF version of the Form 498 by clicking the New Service Provider link on the [E-File](#) home page. Then you can print and mail a copy to USAC.

If you have any questions about updating your Form 498, please contact USAC Customer Operations at **888-641-8722**.

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High Cost Program

Establishing Users in E-File

To establish authorized users in E-File, the General Contact or Company Officer listed on the Form 498 must log in to E-File and create a New User under Authorized Users on the left-hand side of the Information Center (see picture on page 1).

After clicking on New User, you will be asked to supply the email address of the user you wish to add. Enter the email address and click Search. If the user already exists, their information will appear. If not, you will need to fill in the required information such as address and contact information. Then, you click on the Next button to assign entitlements in E-File to the New User.

On the next screen, select the check boxes for the forms you want your new user to have access to and then click the Save button. Then you will get a message that your new authorized user was successfully added to your E-File account. Now this user can prepare the online Form 497 or Form 525 for the company officer to submit and certify to USAC.

ADD NEW USER SCREENSHOT

User Management - Assign New User User: John Smith

[My Account](#) | [Log Out](#)

Please enter the email address of the user you wish to add. If that user already exists the necessary information will pre populate on the next page. If the user does not exist you will be prompted to create the user on the following pages. Please use note that the email address will be the user's logon id for the e-filing system. Please refer to the information.

Email:

'tony@cetc1.com' is a new user. Please fill out their information below.

HCLI 497 Agent
 HCLI 525 Agent

First Name:

Middle Initial:

Last Name:

Street Address Line 1:

Street Address Line 2:

Street Address Line 3:

City:

State:

Zip:

Phone:

Fax:

Please [hit Next](#) to assign entitlements...

Field names in bold are required.

ASSIGN ENTITLEMENTS SCREENSHOT

User: John Smith

[My Account](#) | [Log Out](#)

Please ensure you add at least one entitlement above to this user. In order to successfully create a user they must have at least one entitlement. Once you have added an entitlement the "save button" will be available.

User Email:

Full Name:

<input type="checkbox"/> SPIN	<input type="checkbox"/> Filer ID	<input type="checkbox"/> SLD Form 472	<input checked="" type="checkbox"/> HCLI Form 497	<input checked="" type="checkbox"/> HCLI Form 525
		<input type="checkbox"/> 143032738	<input checked="" type="checkbox"/> 143032738	<input checked="" type="checkbox"/> 143032738

Low Income Program

Online Filing FCC Form 497

Eligible telecommunications carriers (ETCs) file the *Lifeline and Link Up Worksheet* (FCC Form 497) to claim reimbursement for Lifeline, Link Up, and Toll Limitation Service (TLS) discounts provided to eligible households.

The FCC Form 497 is available online through USAC's [E-File System](#). USAC has posted links on its website to the [online form and user instructions](#). The instructions include directions for establishing new user accounts, updating existing accounts, completing the online Form 497, and contacting USAC.

Frequently Asked Questions about the Online Form 497

Q. I need help using the form, are there instructions available?

A. Yes. The [most recent instructions](#) are posted on the Low Income Program section of USAC's website.

Q. How often are the instructions updated?

A. USAC will update the instructions and FAQs on an as-needed basis. Please refer to the [most recent instructions](#) for the most recent information.

Q. Can I submit an online 497 for a new ETC or new service area (study area)?

A. No. All new companies must submit their first Form 497 by mail, fax, or email.

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New Mailing Address for High Cost and Low Income Filings

USAC now collects all High Cost and Low Income forms at its Washington, DC mailing address. High Cost and Low Income email addresses and fax numbers will remain the same. ETCs must send Low Income FCC Form 497 and High Cost Forms 507, 508, 509, 525, Local Switching Support forms, line count filings, CMT revenue filings, and any additional information to USAC at the address below:

NEW MAILING ADDRESS FOR HIGH COST/LOW INCOME

USAC
Customer Operations
2000 L Street NW, Suite 200
Washington, DC 20036

To avoid interruption in form processing, USAC recommends that ETCs file FCC Forms 497 and 525 [online](#).

USAC will continue to receive High Cost and Low Income forms sent to USAC New Jersey until December 31, 2009. **After that date, USAC will not process any High Cost or Low Income data mailed to the old address.** For this reason, we strongly encourage you to change your records to indicate the new address or, if applicable, submit the Forms 497 and 525 [online](#).

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High Cost Program

Using the Online Form 525 for Competitive ETC Line Count Filings

USAC encourages CETCs to use its E-File System to file their Form 525 line count data online using the e525. The e525 provides you with tabs for each component of High Cost support and drop-down menus to easily select the ILECs in whose areas you provide service. After the first time you use the e525, the wire centers will be pre-populated the next time you use it.

The screenshot shows the top navigation tabs: Carrier Info, HCL/LSS, ICLS, HCM, IAS, UNE Reporting, and Certify/Submit. The IAS tab is active. Below the tabs, there is a header section with SPIN: 143027419, Quarterly Submission for 2Q2008, SAC: 559007, HCL/LSS lines as of: Dec 31, 2007 due Jul 31, 2008, and FCC Form 525. A green callout box labeled "Component Tabs" points to the IAS tab. Below this is a section for data entry with fields for (16) and (17)*, (20) Select Disaggregation Zone, (21) Select Wire Center, (22) Lines, and (23) UNE. A green callout box labeled "Drop-down Menus" points to the (16) and (17)* field. Below the data entry fields is a table titled "Line Count Data for Path 1, 2 and 3 Carriers".

(16) ILEC Name	(17) ILEC SAC	(18) ETC?	(19) Path	(20) Disaggregation Zone	(21) Wire Center CLLI	(22) Total Lines In Service	(23) UNEs?	Remove
HOPI TELECOMMUNICATIONS COMPANY	450815	N	1		KMCNAZXC	1	N	X
GILA RIVER TELECOM.	452179	N	3	zone 2	BLWRAXKA	1	N	X

Buttons at the bottom include Delete All Rows, Upload Data, Save, and Return to 525 List.

You can also revise previously filed data or submit data via a bulk upload feature. The e525 also validates your data before it is submitted to ensure accurate filings. Once your data is validated you must finalize your submission by clicking the Certify/Submit button on the Certify/Submit tab of the form.

In order to use E-File, USAC recommends that CETCs confirm that all personnel filing High Cost line count data have access to USAC's E-File system (see page 3 on establishing users). Access to e525 is managed

The screenshot shows the Certify/Submit tab. It contains a certification statement: "I, as agent for the reporting carrier, certify that I am authorized to submit the information reported herein based on actual line count data provided by the reporting carrier; and, to the best of my knowledge, the information reported herein is accurate. I also certify that I will provide copies of the line count filing to the reporting carrier within 15 days." Below this is a form for the reporting carrier and agent information, including fields for Name of Reporting Carrier, Name of Authorized Agent, Signature of authorized agent or employee of agent, Title of agent, and Employee of agent. A green callout box labeled "Certify/Submit Tab" points to the tab. A green callout box labeled "Form not final until you click Certify/Submit button." points to the Certify/Submit button. At the bottom, there are buttons for Certify/Submit, Validate Form 525, and Return to 525 List.

through the E-File portal. It is critical that you identify your online users, update their information, and/or confirm their logins and passwords.

Only the Officer and General Contact have authority to submit the e525 until other "Authorized" users are established such as company staff, as well as agents. In the case of agent-entered data, as is the case with

the paper Form 525, an authorized company representative must make a final certification for the e525. Step-by-step instructions for setting up "Authorized" users can be found in the E-File User Guide on pages 25-37.

Bulk Upload Templates for Online CETC Form 525

CETCs wishing to use the bulk upload feature of the online Form 525 may request templates with carrier and wire center information in the proper file format. Please e-mail USAC High Cost at hcinfo@usac.org with the study area codes (SACs) for which you'd like templates.

For questions, please call 1-877-877-4925.

Low Income Program

Q. Can I revise forms originally submitted offline?

A. Yes. Carriers can revise any Form 497 that was submitted offline as long as it falls within the current administrative window. For example, you can use the online 497 to submit original or revised forms for 2008 and 2009 data months.

Q. Do I need to re-enter all the data for a revised Form 497?

A. No. Only modify the data you wish to change. You will need to re-certify the form. Carriers that submitted Forms 497 using the bulk upload template can either revise their data by uploading a new template or by following the instructions for single form submissions. If you use the template, only include the study areas that need revisions.

Q. I successfully certified my data. Will I receive a confirmation email?

A. No. You will receive a message on your screen that states: "Form 497 certified successfully." You may save a copy of this screen for your records.

Q. I successfully certified my data. Should I send a paper copy to USAC as well?

A. No. With the exception of revisions, please provide only one Form 497 per data month—either offline or online—to USAC.

Q. Can I enter more than one Form 497 at a time?

A. Yes. You can use the Bulk Upload feature to upload multiple Forms 497.

Q. How do I get a bulk upload template?

A. You can contact [Tanea Davis](#) for a template. Please include the applicable SPINs and SACs.

Q. How should I save my bulk upload template?

A. Templates should be saved as .xls files (EXCEL 97-2003). Other formats, including .xlsx (EXCEL 2007), will not upload.

Q. Can I certify more than one Form 497 at a time?

A. Yes. You can use the Bulk Certify feature to certify multiple Forms 497 for a specific month that have a saved status.

Q. Do I have to certify all forms that are saved?

A. No. You can select which forms you wish to certify.

Frequently Asked Questions about E-File

Q. How do I know if I have access to the online 497?

A. Existing E-File users should see a link called *497 Online Form* on their information center. Contact your company's 498 Officer or General Contact to modify your entitlements if you do not see this link. Officers and General Contacts should contact 888-641-8722 and select prompts #3, #1, #2 to reach customer operations. Customer operations can help identify problems with your 498 account. New Users will need the company's 498 Officer or General Contact to set up the appropriate entitlements.

Q. I get an error message when I try to log into E-File through the link on the website. How do I access the Online Form 497?

A. Close your web browser and open a new browser. Cut and paste <https://forms.universalservice.org> into the address bar.

Q. I don't remember my password, how can I get a new one?

A. If you are the officer or general contact, you can call 888-641-8722 and select prompts #3, #1, #2 to reach customer operations. The customer operations team will reset your password over the phone. Everyone else will need his or her password reset by the officer or general contact listed on Form 498.

If you have questions about the Online Form 497 and its features, contact Tanea Davis at tdavis@usac.org or call 202-776-0200.