

California Lifeline Leader's Guide

Questions & Answers About Discounted Lifeline Telephone Service for Low-Income Californians



A CONSUMER ACTION PUBLICATION

Universal Lifeline Leader's Guide

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Introduction

Universal Lifeline Telephone Service (ULTS), also known as California Lifeline, provides discounts on basic residential telephone service to eligible low-income households. Consumers who qualify for California Lifeline pay a fraction of the regular cost for telephone connection and monthly local telephone service.

All California telephone companies that provide residential service offer the Lifeline program. As of July 2006, new rules established by the California Public Utilities Commission (CPUC) require customers to qualify in one of these two ways:

- **By participating in an approved public assistance program**
- **By meeting the Lifeline program's household income limits**

In addition, continuing Lifeline customers must verify their eligibility each year.

Lifeline features and benefits

What benefits does the Lifeline program offer?

Lifeline offers:

- **Significant discounts on local telephone service.**
- **Discounts on the connection fee when you start service and on the conversion fee when you change your service plan.**
- **An installment plan for paying connection fees.**
- **A second Lifeline connection for households with a hearing-impaired member.**
- **Free toll blocking.**

What discounts do Lifeline participants receive?

The Lifeline program offers the following discounts:

- **Service connection discount: Start telephone service for \$10 or half of the telephone company's regular connection charge for residential service, whichever is lower.**
- **Discount when you change or convert your existing service to Lifeline: When you make a change in your service, you will pay: (1) \$10, (2) half of the regular charge for service connection or (3) the regular conversion charge, whichever is lower.**
- **Flat-rate local telephone service discount: Make unlimited local calls for as low as \$5.47 per month or half the telephone company's regular residential flat-rate local service charge, whichever is lower.**
- **Measured local telephone service discount: Make up to 60 local calls per month for as little as \$2.91 per month or half the telephone company's**

**regular residential measured local service charge, whichever is lower.
Additional local calls (more than 60 per month) cost 8¢ each.**

- **Subscriber Line Charge waiver: Lifeline customers do not have to pay the monthly Federal Subscriber Line Charge.**

Can I pay the cost of the connection charge in installments?

Yes. Depending on which carrier you use, you have the option to pay these charges in up to 12 monthly installments with no added interest.

Which service plan is best for me?

Consider the flat rate option if you make three or more local calls per day. Measured service will be the better choice if you make only one or two calls each day.

What are local toll calls?

Local toll calls are calls you make outside of your local calling area but not far enough to be considered long distance. Local toll calls cost extra. Rates depend on where you call and at what times you place the calls. Check your telephone directory for these rates.

Can I make long distance calls with Lifeline?

Yes, but Lifeline does not discount the price of long distance calls. As a Lifeline customer, you can make long distance [toll calls] as long as you have not “blocked” long distance calling from your telephone account.

When you sign up for Lifeline with your local telephone company, the customer service representative will ask you if you have a preferred long distance carrier. If you don’t, the representative can provide a list of long distance carriers. When you select one, long distance calls will be carried by the company you choose.

As a Lifeline customer you also have the option to decline long distance service and sign up for free toll blocking.

What is toll blocking?

If you qualify for Lifeline, you are eligible for free toll blocking, which prevents you or anyone else from making long distance or local toll calls from your telephone. This protects you from the possibility of running up a large bill that you cannot pay. With toll blocking you can still receive long distance calls and you can call toll-free numbers. You can place long distance calls using a prepaid telephone card.

What if I want call waiting, caller ID, or other special features?

As a Lifeline customer, you can order optional services such as call waiting or caller ID, but you will not get a discount on these services. Before ordering

any optional services, consider whether you will use them enough to make the cost worthwhile.

If I need a phone jack or outlet installed, is that covered by Lifeline?

No. Lifeline does not give you reduced rates for installing an outlet. If you need to have an outlet installed, you will have to pay an installation charge to the company that does the work. If you are a renter, California law requires that your landlord provide one working jack in each rental unit.

Does Lifeline help with phone service for the deaf or hearing-impaired?

Yes. If your household is eligible for the Lifeline program and includes someone who is deaf or hard of hearing and needs a text telephone device (TTY) when using the phone, you may qualify for two telephone lines at Lifeline rates. With two lines, a hearing-impaired person can communicate through a special relay service.

In order to qualify for two discounted telephone lines, you must meet the following requirements:

- **Your household is eligible for the first Lifeline line.**
- **The disabled person in your household must have and use a text telephone device (TTY) in the home.**
- **If the TTY in your home is not issued by the Deaf and Disabled Telecommunications Program (DDTP), then you must submit a medical certificate showing that you or another household member needs a TTY to use the telephone.**

How do I get a TTY/TTD or VCO device, or a medical certificate of disability?

The California Telephone Access Program (www.ddtp.org/CTAP) distributes telecommunications equipment and services to individuals with hearing, vision, mobility or speech limitations. English: 800-806-1191 (voice); 800-806-4474 (TTY). Spanish: 800-949-5650 (voice); 800-896-7670 (TTY).

Program eligibility

Who can participate in Lifeline?

Your household qualifies for Lifeline service if:

- **You participate in one of the approved public assistance programs, or**
- **You meet the program's household income limits, and**
- **You have the Lifeline connection in your primary residence, and**
- **You are not a dependent on someone else's income tax return.**

How do I qualify under the program-based guidelines?

You qualify for Lifeline if you or another person in your household is enrolled in any of the following public assistance programs:

- Medicaid/Medi-Cal
- Supplemental Security Income (SSI)
- Food Stamps
- Healthy Families Category A
- Tribal Temporary Assistance for Needy Families (Tribal TANF)
- Women, Infant and Children Program (WIC)
- Low Income Home Energy Assistance Program (LIHEAP)
- Federal Public Housing Assistance or Section 8
- Temporary Assistance for Needy Families (TANF)
- National School Lunch's FREE Lunch Program (NSL)
- Bureau of Indian Affairs General Assistance
- Head Start Income Eligible (Tribal Only)

How do I qualify under the income-based guidelines?

You qualify for Lifeline if your total before-tax household income does not exceed these limits:

Household Size	ULTS Annual Income Limits (6/1/08 through 5/31/09)*
1-2 members	\$22,900
3 members	\$26,900
4 members	\$32,400
Each additional member	Add \$5,500 per person

*Income limits are adjusted annually.

What is considered a “household”?

A household is one family or an extended family that lives together as a group. If one or more families share a house, apartment or other living space, each family (or household) is eligible for its own Lifeline telephone service.

What is included in household income?

Household income includes all taxable and non-taxable income received by everyone in your household. This includes, but is not limited to:

- **Wages and salaries**
- **Interest and dividends**
- **Spousal support (alimony) and child support**
- **Grants, gifts, allowances and stipends**
- **Social security and pensions**
- **Public assistance payments**
- **Rental income**
- **All cash and non-cash employment income (including self-employment)**

Applying for Lifeline

Whom do I contact to apply for Lifeline service?

If you do not already have telephone service but believe you qualify for Lifeline, contact a telephone company that provides local service for your area (check the Yellow Pages directory under “Telecommunications Carriers”).

If you already have regular (non-Lifeline) local telephone service, call your provider at the number printed on your monthly telephone bill and ask to apply for California Lifeline service. (When you change from basic residential service to Lifeline, there is a small one-time charge.)

What forms do I need to apply for Lifeline?

The California Lifeline Program will send you a California Lifeline Certification Form that you must complete and return to the certifying agent at the address provided by the due date on the form (approximately 44 days). The form will arrive in a pink envelope.

You may elect to qualify for Lifeline based on participation in a public assistance program (“program-based”) or on your household income (“income-based”). You need to use just one of these two methods to determine your eligibility—not both.

What documentation do I need to provide for the public assistance program-based eligibility?

If your application is program-based, complete the section of the Certification

Form titled “Method 1 Program-Based.” Just fill in the circle next to the appropriate public assistance program for you or members of your household. Provide the name of the individual in your household who is enrolled in the assistance program. You do not need to provide proof unless the certifying agent contacts you again.

What documentation do I need to provide for the income-based eligibility?

Complete the section of the Certification Form titled “Method 2 Income-Based.” Provide proof that your total household income is at or below the Lifeline maximum. (Make copies of all papers before sending them with the application. Do not send your originals.)

What about eligibility for a second Lifeline connection for a deaf or hearing-impaired person?

If you are requesting a second California Lifeline connection for a deaf or hearing-impaired household member, you can elect to use either qualification method. In addition, complete the appropriate section of the form to determine, according to the instructions, whether you will need to attach a medical certificate that verifies the person’s need for a text telephone device, or TTY.

If I am applying for Lifeline under the income-based guidelines, what proof of income documents are accepted?

Acceptable proof-of-income includes one or more of the following:

- **Last year’s state, federal, or tribal tax return**
- **Income statements or paycheck stubs for three consecutive months within the last 12 months**
- **Child support documents**
- **Statement of benefits from Social Security, Veterans Administration, retirement/pension, unemployment compensation or worker’s compensation**
- **A divorce decree**
- **Other official documents that prove your income**

How will I know if my application has been approved?

You will receive a letter from the California Lifeline Program notifying you whether you have been approved or denied for the Lifeline program. If your application is denied, you may have to pay back any discounts you have received. To check the status of your application call the California Lifeline Program at 877-858-7463 (English/Spanish) or 888-858-7889 (TTY).

Yearly verification

Do I have to do anything to continue my Lifeline service?

Yes. All Lifeline participants must verify each year that they still are eligible for the program. The California Lifeline Program will mail you a California Lifeline Annual Verification Form 104 days before your enrollment anniversary date. The verification form will be mailed in a pink envelope. To remain in the program, you complete either the Method 1 Program-Based or Method 2 Income-Based section of the Verification Form every 12 months. You must complete and return the form by the due date printed on the form.

If you or someone else in the household has a hearing disability, and you have two ULTS lines, you must also complete the appropriate section of the form to keep the discounts on the two lines.

I can qualify under income-based and under program-based eligibility guidelines. Which method should I use?

If you are currently enrolled in any of the qualifying public assistance programs, complete the program-based section of the verification form. If you don't receive benefits from any of the covered assistance programs, you must complete the income-based section of the verification form.

Do I have to send proof with my verification form?

You do not need to send proof of income when you are verifying your continued eligibility in the program. The certifying agent will contact you if additional information must be provided to support your application.

What if my verification form is not received by the due date?

It is very important that the certifying agent receive your completed form by the due date on the form. (Mail it in advance of the due date so that it arrives by the deadline.) Forms that arrive late will not be processed.

If you fail to verify your continued eligibility by the due date, the Certifying Agent will instruct your telephone company to:

- **Remove you from the Lifeline program.**
- **Change your service to full-priced residential service.**
- **Require a deposit from you, if applicable.**

What if I no longer qualify for Lifeline?

Notify your telephone company if you no longer qualify for Lifeline discounts or a second Lifeline connection or you might have to repay the difference.

Can Lifeline check on me to make sure I am eligible?

Under the program, a small number (3%) of Lifeline verifications must be randomly audited (checked) each year. This means that the certifying agent might check your income or status as a benefits recipient. If you are one of the audited customers you will be asked for proof of income or benefits. If the audit finds that you are not eligible, you will be removed from the Lifeline program on your renewal date and your service will be changed to full-priced residential service.

Additionally, the Commission or the Certifying Agent may audit your eligibility to participate in the California Lifeline program at any time. If the audit finds that you are not eligible, you will be removed from the program and billed for previous Lifeline discounts that you should not have received, plus interest.

Disconnection for non-payment of charges

My phone has been disconnected because I did not pay my basic (local) service charges for several months. Can I still get Lifeline?

Yes, you can still get Lifeline service even if your phone has been disconnected because you did not pay your basic service charges. However, before you can be reconnected, you must pay off all of your past-due basic service charges, including applicable taxes and surcharges. Once your past-due balance is paid in full, assuming you qualify for Lifeline under the program guidelines, your service can be connected.

If you have been disconnected for non-payment of basic service charges, you will, upon reconnection, be subject to toll restriction (the same as toll blocking, but initiated by the telephone company). Or, if you choose to order long distance service or non-basic features, you will have to pay a deposit.

I owe \$350 in long distance charges. Will this affect my Lifeline service?

No, your Lifeline service cannot be cancelled and your phone cannot be disconnected for non-payment of long distance charges. However, your telephone company may place toll restriction on your account, making it impossible for you to make toll calls from your phone. If past due, your long distance account may be put in collection and you may be contacted by bill collectors.

If you begin Lifeline service while you have an outstanding long distance bill, your local telephone company will place toll restriction on your account, making it impossible for you to make toll calls, until your entire long distance bill is paid off.

I owe the phone company money. Can I pay it off in installments?

Typically, telephone companies consider installment plans on a case-by-case basis. Contact your telephone company directly to discuss payment options.

Can the phone company disconnect a Lifeline customer for failure to pay long distance charges?

No. Your basic phone service cannot be disconnected because you did not pay your bill for long distance charges or non-basic features and services charges.

Under what circumstances can a Lifeline customer's phone be disconnected?

Your phone can be disconnected if you fail to pay your bill for basic service.

SAMPLE Lifeline Program-Based Annual Verification Form

(Note: This is not an official form. It is intended for use only as a teaching example.)

A. Name of Carrier: _____ ULTS Start Date: _____

Return this form by [specific date] to continue on the discount program.

B. Customer Information

First Name and Middle Initial _____

Last Name _____ SS # (Optional) _____

Service Address _____

Suite/Apartment City _____ State _____ Zip Code _____

ULTS Telephone # () - _____

Billing Address (if different from service address) _____

Apartment No. _____ City _____ State _____ Zip Code _____

Contact Tel. () - _____

C. Qualifying Criterion: Program-based

If you or another person in your household is enrolled in any of the following programs, you qualify for ULTS. Please identify the program by checking the corresponding box below:

- Medicaid/Medical Food Stamps Supplemental Security Income
 Federal Public Housing Assistance (Section 8) Low Income Home Energy Assistance Program Temporary Assistance for Needy Families
 National School Lunch's FREE Lunch Program Healthy Families Category A
 Tribal TANF Bureau of Indian Affairs General Assistance
 Tribal NSL Tribal Head Start Women, Infant and Children (WIC) program

Please provide the name of the household member who is enrolled in the above checked program: _____

D. Continued Qualification of 2 ULTS lines:

You have been qualified for 2 ULTS lines. For your continued qualification of 2 ULTS lines, please provide the appropriate information below:

- _____ is a household member and has immediate and continuous access within the household to a TTY.
 A new household member is using a TTY issued by DDTP.
 Attached is a copy of the medical certificate indicating a new household member's need for a TTY. (Please attach medical certificate.)

Name of the new household member using the TTY: _____

E. Signature

By signing below, I certify, under penalty of perjury, that this information is correct.

Customer Signature _____ Date _____

F. How do you prefer to receive notifications: Large Font Braille (English only)

SAMPLE Lifeline Income-Based Annual Verification Form

(Note: This is not an official form. It is intended for use only as a teaching example.)

A. Name of Carrier: _____ ULTS Start Date: _____

Return this form by [specific date] to continue on the discount program.

B. Customer Information

First Name and Middle Initial _____

Last Name _____ SS # (Optional) _____

Service Address _____

Suite/Apartment City _____ State _____ Zip Code _____

ULTS Telephone # () - _____

Billing Address (if different from service address) _____

Apartment No. _____ City _____ State _____ Zip Code _____

Contact Tel. () - _____

C. Qualifying Information: Income-Based

If your household size meets the corresponding ULTS yearly Income Limits noted below, you may remain on the ULTS program. Please identify your household size by checking the appropriate check box below:

Household Size

ULTS Yearly Income Limits (6/1/08 through 5/31/09)

1-2 Members, \$22,900

3 Members, \$26,900

4 Members, \$32,400

5 Members, \$37,900

_____ Members

For each additional member after 5 members, add \$5,500 to \$37,900

\$ _____ [write in total]

D. Continued Qualification of 2 ULTS lines:

You have been qualified for 2 ULTS lines. For your continued qualification of 2 ULTS lines, please provide the appropriate information below:

_____ is a household member and has immediate and continuous access within the household to a TTY.

A new household member is using a TTY issued by DDTP.

Attached is a copy of the medical certificate indicating a new household member's need for a TTY. (Please attach medical certificate.)

Name of the new household member using the TTY: _____

E. Signature

By signing below, I certify, under penalty of perjury, that this information is correct.

Customer Signature _____ Date _____

F. How do you prefer to receive notifications: Large Font Braille (English only)

Lifeline resources

Who provides Lifeline service in California?

There are 35 providers of local telephone service and the Lifeline program in California, but two telephone companies serve most Lifeline participants. They are:

- **AT&T California: Lifeline interactive voice response system: 800-446-5651 (English)/ 800-882-0521 (Spanish); service orders: 800-288-2020 (English); 800-870-5855 (Spanish); 800-651-5111 (TTY); www.att.com/lifeline**
- **Verizon: 800-483-4000 (English)/800-743-2483 (Spanish)/800-974-6006 (TTY). Verizon does not have a web page devoted to California Lifeline. You can visit its web site at www.verizon.com.**

How do I contact a Lifeline provider?

If you do not already have telephone service but believe you qualify for Lifeline, contact a telephone company that provides local service for your area (check the Yellow Pages directory under “Telecommunications Carriers”). You can also find providers at www.californialifeline.com or by calling the Lifeline call center at 866-272-0349 (English) or 866-272-0350 (Spanish).

If you already have regular (non-Lifeline) local telephone service, call your current provider at the number printed on your monthly telephone bill and ask to apply for California Lifeline service.

Where do I go to get telephone devices for people with disabilities or impairments?

The California Telephone Access Program (www.ddtp.org/CTAP) distributes telecommunications equipment and services to individuals with hearing, vision, mobility or speech limitations. English: 800-806-1191 (voice); 800-806-4474 (TTY). Spanish: 800-949-5650 (voice); 800-896-7670 (TTY).

Where do I go with complaints related to Lifeline?

The California Public Utilities Commission (www.cpuc.ca.gov), the state’s utility regulator, oversees the Lifeline program. If you have a complaint, try to resolve it first with the telephone carrier or, if appropriate, the certifying agent. If you are not satisfied, contact the CPUC’s Consumer Affairs Branch, 505 Van Ness Ave., San Francisco, CA 94102. Telephone: 800-649-7570 or 415-703-1170. Fax: 415-703-1158. E-mail: consumer-affairs@cpuc.ca.gov.

Where else can I find general Lifeline information?

California Lifeline (www.CaliforniaLifeline.com) is the certifying agent’s website providing general Lifeline program information, sample forms and

instructions, answers to frequently asked questions, telephone carrier listings and links to CPUC online information.

Where can I find other consumer information?

Consumer Action (www.consumer-action.org) provides consumer advice, guides consumers to complaint-handling agencies and distributes free consumer education publications on a wide variety of topics, in Chinese, English and Spanish. Telephone: 415-777-9635 or 213-624-8327. E-mail: hotline@consumer-action.org.

About this Project

The Universal Lifeline Leader's Guide was created by Consumer Action and AT&T California. Subtitled "Questions & Answers About Discounted Lifeline Telephone Service for Low-Income Californians," this booklet is designed to help staff members and trainers at community-based organizations present accurate information about Universal Lifeline Telephone Service (ULTS).

The Leader's Guide includes sample annual verification forms that can be used as a teaching tool to help people learn how to comply with the verification procedures for the Universal Lifeline Telephone Service (ULTS) program. (See pages 10 and 11.) Consumer Action has also developed a Lifeline teaching curriculum and PowerPoint slides for use in making presentations and in training trainers.

Consumer Action's free consumer brochure about the California Lifeline program is available in Chinese, English, Korean, Spanish and Vietnamese. To find out more about how community-based agencies can order bulk copies of the brochure and other materials, contact Consumer Action:

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