

SAC: 330848
State: Wisconsin
Bergen Telephone Company
Form 481 Line No.: 1210 Terms and Conditions of Voice Telephony Lifeline

- (2) CHARGES. Blocking shall be without monthly or nonrecurring charge to low-income customers and at no charge other than for second and subsequent service activation orders for other residential and standard business line customers.
- (3) EMERGENCY SERVICE. Blocking shall not prevent the customer from reaching the emergency service numbers appropriate for the customer's location.
- Bergen Telephone Company's Lifeline service offerings are listed in their Local Service Tariff Section 9, Sheet 1-2 (attached).
 - The Local Service Tariff is on file with the Wisconsin Public Service Commission.
 - All Lifeline subscribers must meet the terms and conditions of Federal Lifeline Eligibility Rules.
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Bergen Telephone Company does adhere to all Federal Lifeline eligibility rules and regulations as well as Wisconsin Administrative Code "Chapter PSC 160" which states:

PSC 160.02 Definitions.

- 8) "Low-income" means a household that receives benefits from one or more of the following programs:
- (a) Wisconsin Works
 - (b) Medical Assistance
 - (c) Supplemental security income
 - (d) Food stamps
 - (e) The low income household energy assistance program
 - (f) The Wisconsin homestead tax credit
 - (g) Badger care
 - (h) As approved by the commission, other state or federally administered programs for households with income levels equal to or less than 200% of the poverty line.

PSC 160.06 Eligibility for low-income programs.

- (1) LOW-INCOME ASSISTANCE ELIGIBILITY. Local exchange service providers shall verify an applicant's eligibility for low-income assistance programs by making timely queries of the applicable databases of the Wisconsin department of workforce development, the Wisconsin department of revenue, or other state agencies. Applicant eligibility shall be verified by finding the applicant to be any of the following:
- (a) An active client of at least one of the programs listed in s. PSC 160.02(8).
 - (b) A member of the active client's household whose low income qualifies the client for benefits under at least one of the programs listed in s. PSC 160.02(8).
 - (c) A recipient of the Wisconsin homestead tax credit for the most recently completed tax year. If the applicant's tax filing for the most recently completed tax year has not been posted to the records of the Wisconsin department of revenue and if application for low-income assistance is made on or before June 30th, then the tax year prior to the most recently completed tax year may be used to determine eligibility.

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- (2) **ELIGIBILITY RECONFIRMATION.** Eligibility shall be reconfirmed on at least an annual basis for all customers receiving lifeline assistance.
- (3) **ELIGIBILITY INQUIRY.** Local exchange service providers shall inquire of the customer regarding eligibility of that customer for low-income programs on each order for initial or moved residential service and, orally or in writing, in the first contact with a customer during a year concerning disconnection or payment arrangements.
- (4) **QUERY AUTHORIZATION.** Local exchange service providers shall comply with client authorization requirements of the Wisconsin department of workforce development, the Wisconsin department of revenue, or other state agencies for database queries necessary for eligibility verification. Customers shall complete and remit any reasonably required query authorization forms or forfeit eligibility.
- (5) **EXCEPTIONS.** Lifeline and Link-Up programs are not available to customers who are dependents for federal income tax purposes as defined in 26 USC 152 (1986), unless the customer is more than 60 years of age.

PSC 160.062 Lifeline program.

- (1) All local exchange service providers shall offer a lifeline monthly rate to all qualified low-income customers.
- (2)
 - (a) The lifeline monthly rate includes single-party residential service, touch-tone service, any 9-1-1 charges billed on the telephone bill, the federal subscriber line charge and 120 local calls, excluding extended community calling calls.
 - (b) The lifeline monthly rate shall be the total of the residential monthly rates for the items in par. (a) minus \$7 or, if the total of the monthly residential rates for the items in par. (a) is greater than \$22, the lifeline monthly rate shall be \$15.
 - (c) Notwithstanding par. (b), in no case shall the lifeline monthly rate be less than \$3 or more than \$15.
- (3) The lifeline monthly rate may appear as a credit against the full standard tariffed rate on a customer's bill or as a special rate designation. Whenever possible, the lifeline rate shall begin to appear on an eligible customer's bill on the next bill date following the date of application for lifeline assistance. If the rate does not begin to appear on the next bill date, when it does appear back credit will be given. In cases where a customer's eligibility date as found in the records of the Wisconsin department of workforce development, the Wisconsin department of revenue, or other state agencies precedes the last bill date prior to application, credit shall also be given for one month's prior bill.
- (4)
 - (a) Eligibility for lifeline assistance continues until the next bill date following a failure to meet eligibility requirements.
 - (b) When the low income household energy assistance program is one of the customer's qualifying income assistance programs, the eligibility for lifeline assistance shall continue until the bill date in the next December following the close of the heating season. At that time, lack of eligibility shall be re-verified by the local exchange service provider before removing the lifeline assistance from the customer's bill.

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- (c) When the homestead tax credit is one of the customer's qualifying income assistance programs, the eligibility for lifeline assistance continues until the bill date in the next June following the end of the tax year. At that time, lack of eligibility shall be re-verified by the local exchange service provider before removing the lifeline assistance from the customer's bill.
- (5) Local exchange-service providers may receive reimbursement from the universal service fund for 100% of that portion of the standard authorized rate for service which is in excess of the amount of the lifeline monthly rate which is eligible for reimbursement from federal lifeline program funds.
- (6) Customers eligible for lifeline or link-up America assistance may not be charged a deposit for service if they voluntarily accept toll blocking, may not be requested to pay in advance for more than one month's local service bill, and may not be disconnected from local service for nonpayment of toll charges billed by the local exchange service provider. Customers that otherwise would be subject to disconnection may be counseled to accept toll blocking.
- (7) A local exchange service provider acting under the limited conditions specified in its commission approved telecommunications customer assistance program under s. PSC 160.08 may impose toll blocking or restriction on lifeline customers.

PSC 160.063 Outreach for low-income assistance programs.

- (1) Funding shall be available to fund collaborative partnerships between community-based organizations and telecommunications providers to increase participation of the eligible populations in the universal service fund low-income support programs.
- (2) Funding from the universal service fund for these collaborative efforts shall not exceed \$250,000 in one year.
- (3) The commission shall annually review and grant funding based on complete responses to a request for proposals. Funding shall be limited to not more than 6 projects with at least one project focused statewide and one project focused on the Milwaukee area, if feasible.
- (4) The commission shall contract for an evaluation of the effectiveness of this program in promoting enrollment in low-income programs and subscribership to telephone service to be completed within 2 years of May 1, 2000. The cost of this evaluation shall not exceed \$25,000. This \$25,000 shall be included as part of the \$250,000 maximum total funding available under this section during the year in which the evaluation occurs.

PSC 160.08 Telecommunications customer assistance program.

The commission may authorize individual telecommunications providers to establish telecommunications customer assistance programs that meet authorized goals and objectives for increasing or stabilizing subscription levels for non-optional, essential telephone service within its service territory or to address avoidance of disconnection or limitation of service to low-income households with payment problems. Such programs may allow a provider to not make available certain essential services, as defined in s. PSC 160.03(2), in order to preserve at least minimal telephone service to certain low-income households with payment problems. The commission shall determine on a case-by-case basis whether or not a telecommunications customer assistance program may receive universal service fund monies.

RATE FILE

State of Wisconsin/Public Service Commission
UR-14 (5-84)

Section Number :	9
Sheet Number :	1
Schedule Number :	
Amendment Number :	

Utility Name	The Bergen Telephone Company
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LIFELINE PROGRAM

A. Description

Lifeline is a program designed to provide telephone service at a monthly discounted rate to low income customers, as defined in s. PSC 160.02(8), Wis. Adm. Code. Lifeline rates are established according to s. PSC 160.062(1), (2) and (3), Wis. Adm. Code and are available to all qualified low-income customers.

B. Regulations

The Lifeline Program is available only to qualifying low-income residential customers with a single telephone line per household.

Customers may not be disconnected from Lifeline service for non-payment of toll charges.

If toll blocking is available and the customer has voluntarily elected toll blocking, a service deposit may not be collected to initiate Lifeline service.

Participation in the specified programs must be verified by the telephone company through the Wisconsin Department of Workforce Development (DWD), or the Wisconsin Department of Revenue.

Customers shall complete and remit any query authorization forms or forfeit eligibility. Verification of eligibility will be deemed to be the finding of the Social Security Number (SSN) and name of the listed customer in the active records of DWD for at least one of the specified income assistance programs, or to be a recipient of the Wisconsin homestead tax credit in the past year.

Credits will appear on an eligible customer's bill on the bill date next following the date of application for the Lifeline Program. In cases where a customer's eligibility date as found in DWD records or the records of the Wisconsin Department of Revenue precedes the last bill date prior to application, credit will also be given on one month's prior bill.

Applicable to Service Rendered on and after:	May 1, 2000	Date Issued	
PSCW Authorization by Order No.:		Letter Date	MAY 17 2000

PUBLIC SERVICE COMMISSION OF WISCONSIN
TELEPHONE RATE FILE

THE BERGEN TELEPHONE COMPANY

Name of Utility

Exchange	ALL
Section No.	9
Sheet No.	2
Amendment No.	601

LIFELINE PROGRAM

B. Regulations (Continued)

Except in cases where a customer's qualifying income assistance programs includes LIEAP or the Wisconsin homestead tax credit, eligibility for the Lifeline Program will continue until the bill date next following a failure to find the customer's SSN in the DWD records.

When LIEAP is one of the customer's qualifying income assistance programs, the Lifeline assistance will continue until the bill date in December next following the close of the heating season. At that time, lack of eligibility will be reverified by the Company before removing the Lifeline assistance from the customer's bill.

When the homestead tax credit is one of the customer's qualifying income assistance programs, the eligibility for Lifeline assistance continues until the bill date in the next June following the end of the tax year. At that time, lack of eligibility will be reverified by the Company before removing the Lifeline assistance from the customer's bill.

The Lifeline Program is not available to customers who are dependents for federal income tax purposes as defined in 26 U.S.C. Section 152(1986) unless the customer is more than 60 years of age.

C. Rates

The applicable monthly rate for lifeline service is determined by the sum of the rates for the services specified in 1. following and applying a credit based on 2. following.

1. Residential Local Monthly Access Line Rate
Residential Touch Tone Rate (if applicable)
Federal Subscriber Line Charge
911 Charge
2. The Lifeline Service monthly credit is \$10.00

Issued _____ Applicable to bills rendered on and after September 13, 2012

PSCW Authorization by order No. _____

Letter _____

SAC: 330848

State: Illinois

Bergen Telephone Company

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- Bergen Telephone Company offers Lifeline Service credit according to basic service requirements listed in Illinois Administrative Code 757.400 and 757.425:

Section 757.400 Lifeline Service Requirements

- a) Each eligible telecommunications carrier shall participate in the Lifeline Program adopted by the FCC in 47 CFR 54.Subpart E as of February 6, 2013. This incorporation does not include any later amendments or editions.
- b) Each eligible telecommunications carrier shall comply with all Lifeline Program requirements adopted by the FCC in 47 CFR 54.Subpart E as of February 6, 2013. This incorporation does not include any later amendments or editions.
- c) Each eligible telecommunications carrier shall meet additional Lifeline service requirements, if any, established by Commission Order.
- d) Each eligible telecommunications carrier shall complete Exhibit A and file an original of this report with the Chief Clerk of the Illinois Commerce Commission within 30 days after the end of each calendar quarter. Carriers that have eligible telecommunications carrier designations for both wireline and wireless operations shall report separately for wireline and wireless operations. Any LEC seeking administrative cost reimbursement shall complete Exhibit B and file an original of this report with the Chief Clerk of the Illinois Commerce Commission within 30 days after the end of each calendar year.

Section 757.425 Lifeline Eligibility

In order to be eligible to receive benefits under the Lifeline Program described in this Subpart E an individual must:

- a) Meet Lifeline Program eligibility criteria adopted by the FCC in 47 CFR 54.Subpart E as of February 6, 2012. This incorporation does not include any later amendments or editions.
- b) Meet additional eligibility criteria, if any, established by the Commission pursuant to Section 757.100(d).

REDACTED – FOR PUBLIC INSPECTION

REDACTED:

Bergen Telephone Company

Financial Data 2013

REDACTED – FOR PUBLIC INSPECTION