

SAC: 300612

State: Ohio

Farmers Mutual Telephone Company

Form 481 Line No.: 1210 Terms and Conditions of Voice Telephony Lifeline Plans

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- Farmers Mutual Telephone Company's Lifeline service offerings are listed in their Local Service Tariff Section 4, Sheet 1 (attached). The Local Service Tariff is on file with the Public Utility Commission of Ohio.
 - All Lifeline subscribers must meet the terms and conditions of Federal Lifeline Eligibility Rules.
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As required by Ohio Administrative Code "4901:1-6-19 Lifeline Requirements" Farmers Mutual Telephone Company shall provide Lifeline service as defined in 47 C.F.R. §54.401(a) on a non-discriminatory basis to all qualifying low-income customers. The company's Lifeline service offering will comply with all applicable federal laws and the Ohio State law listed below.

4901:1-6-19 Lifeline requirements.

(A) An incumbent local exchange carrier (LEC) that is an eligible telecommunications carrier (ETC) under 47 C.F.R. 54.201 shall implement lifeline service throughout the ILEC ETC's traditional service area for its eligible residential customers.

(B) Lifeline service shall be a flat-rate, monthly, primary access line service with touch-tone service and shall provide all of the following:

- (1) A recurring discount to the monthly basic local exchange service rate that provides for the maximum contribution of federally available assistance;
- (2) Free blocking of toll service, 900 service, and 976 service;
- (3) A waiver of the federal universal service fund end user charge;
- (4) A waiver of the telephone company's service deposit requirement.

(C) The ILEC ETC may offer to lifeline service customers any other services and bundles or packages of service at the prevailing prices, less the lifeline discount.

(D) The ILEC ETC also shall offer special payment arrangements to lifeline service customers that have past due bills for regulated local service charges, with the initial payment not to exceed twenty-five dollars before service is installed, and the balance for regulated local service charges to be paid over six, equal monthly payments. Lifeline service customers with past due bills for toll service charges shall have toll restricted service until the past due toll service charges have been paid or until the customer establishes service with another toll provider.

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(E) Every large ILEC required to implement lifeline service shall establish an annual marketing budget for promoting lifeline service and performing outreach regarding lifeline service. Every large ILEC shall work with the advisory board established in paragraph (F) to reach consensus, where possible, regarding an appropriate budget for promoting lifeline and performing outreach and regarding how the budget will be spent. All funds allocated to this budget shall be spent for the promotion and marketing of lifeline service and outreach regarding lifeline service and only for those purposes and not for any administrative costs of implementing lifeline service.

(F) All activities relating to the promotion of, marketing of, and outreach regarding lifeline service provided by the large ILECs shall be coordinated through a single advisory board composed of staff of the public utilities commission, the office of the consumer's counsel (OCC), consumer groups representing low income constituents, two representatives from the Ohio association of community action agencies, and every large ILEC. The commission staff shall provide active leadership in the initial organization of the statewide board and the development of procedures and bylaws under which the board will operate. Commission staff shall, with the assistance of the office of the consumers' counsel, work with the advisory board to reach consensus on the organization of the board and all activities relating to the promotion of, marketing of, and outreach regarding lifeline service. However, where consensus is not possible, the commission's staff shall make the final determination. Decisions on the organization of the board and decisions of the advisory board including decisions on how the lifeline marketing, promotion, and outreach activities are implemented are subject to commission review.

(G) All other aspects of an ILEC ETS's state-specific lifeline service shall be consistent with federal requirements. The rates, terms, and conditions for the ILEC's lifeline service shall be tariffed in accordance with rule 4901:1-6-11 of the Administrative Code.

(H) Eligibility for lifeline service under this rule shall be based on either of the following criteria:

(1) An individual's verifiable participation in any federal or state low-income assistance program that limits assistance based on household income. These programs include:

(a) Medical assistance under Chapter 5111. of the Revised Code (medicaid) or any state program that might supplant medicaid;

(b) Supplemental nutritional assistance program (SNAP/food stamps);

(c) Supplemental security income (SSI) under Title XVI of the Social Security Act;

(d) Social security disability insurance – blind and disabled (SSDI);

(e) Federal public housing assistance, or section 8;

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- (f) Home energy assistance programs (HEAP, LIHEAP, E-HEAP);
- (g) National school lunch program's free lunch program (NSL);
- (h) Temporary assistance for needy families (TANF/Ohio works); or
- (i) General assistance, including disability assistance (DA).

The commission may add or remove programs from this list as required by federal or state law.

(2) Other verification that an individual's household income is at or below one hundred fifty per cent of the federal poverty level. ILEC ETC's may use any reasonable method of verification. Consistent with federal law, examples of acceptable documentation include the following:

- (a) State or federal income tax return;
- (b) Current income statement or W-2 from an employer;
- (c) Three consecutive months of current pay stubs;
- (d) Social security statement of benefits;
- (e) Retirement/pension statement of benefits;
- (f) Unemployment/workmen's compensation statement of benefits;
- (g) Any other legal document that would show current income (such as a divorce decree or child support document).
- (I) All ILEC ETCs must verify customer eligibility consistent with the federal communications commission's (FCC) requirements in 47 C.F.R. 54, to enroll customers into lifeline assistance who qualify through household income-based requirements.
- (J) The commission shall work with the appropriate state agencies that administer deferral or state low-income assistance programs and with carriers to negotiate and acquire information necessary to verify an individual's eligibility and the data necessary to automatically enroll eligible persons for lifeline service.
- (K) To the extent that appropriate state agencies are able to accommodate automatic enrollment, every ILEC ETC shall automatically enroll customers into lifeline assistance who participate in a qualifying program.

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(L) An ILEC ETC shall provide written notification if the carrier determines that an individual is not eligible for lifeline service enrollment and shall provide the person an additional thirty days to provide eligibility.

(M) An ILEC ETC shall provide written customer notification if a customer's lifeline service benefits are to be terminated due to failure to submit acceptable documentation for continued eligibility for the assistance and shall provide the customer an additional sixty days to submit acceptable documentation of continued eligibility or dispute the carrier's findings regarding termination of the lifeline service.

(N) Commission staff will maintain on the commission's website a copy of boilerplate customer notices that are compliant with the FCC's requirements. Any ILEC ETC choosing to create and use its own customer notice shall submit its proposed notice to commission staff for approval.

(O) An ILEC ETC shall establish procedures to verify an individual's continuing eligibility for both program and income-based criteria consistent with the FCC's requirements in 47 C.F.R. 54.409 to 47 C.F.R. 54.410. ILEC ETCs shall maintain records to document compliance with these requirements and shall attest, as part of the periodic ETC certification process by the commission, that they comply with the FCC's requirements.

(P) An ILEC ETC may recover through a customer billing surcharge on retail customers of the ILEC's telecommunications service other than lifeline service customers, any lifeline service discounts and any other lifeline service expenses that are not recovered through federal or state funding and that are approved by the commission under this paragraph. The surcharge may not include recovery of expenses related to the marketing and promotion of lifeline service. The surcharge may be established through one of the following means:

(1) An ILEC ETC that chooses to establish a customer billing surcharge to non-lifeline customers, to recover lifeline service discounts and expenses identified in this paragraph shall file a thirty-day application for tariff amendment (ATA). Such application may request recovery of lifeline service discounts that are not recovered through federal or state funding such as federal universal service fund end user charges, service connection charges, blocking of 900/976, recurring discount maximizing the contribution of federally available assistance, and recurring retail price differences between the frozen lifeline service rate and residential BLES rates, as well as lifeline service expenses that are not recovered through federal or state funding such as administrative expenses for the sole purpose of verifying the eligibility and enrolling of lifeline customers. An applicant must provide documentation to support its proposed surcharge and its compliance with this rule. Absent suspension or other commission action, the application shall be deemed approved and become effective on the thirty-first day or later date if requested by the company.

(2) An ILEC ETC requesting recovery of any expenses not specified in paragraph (P)(1) of this rule shall file an application with the commission, using the most up-to-date telecommunications filing form, under the TP-UNC case purpose code. An applicant must provide documentation to support its proposed customer billing surcharge and its compliance with this rule and must further support its request for recovery of any expenses not specified in paragraph (P)(1) of this rule with a detailed supporting memorandum. Absent suspension or commission action, the application shall be deemed approved and become effective on the one hundred twenty-first day or later date if requested by the company.

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(Q) If an ILEC ETC chooses to establish a customer billing surcharge to recover its lifeline expenses under paragraph (P)(1) or (P)(2) of this rule, the lifeline surcharge shall not appear in the section of the bill reserved for taxes and government-mandated charges as set forth in 47 C.F.R. 64.2400 to 47 C.F.R. 64.2401.

(R) An ILEC ETC that is authorized to establish a customer billing surcharge under with paragraph (P)(1) or (P)(2) of this rule shall annually file with the commission a report that identifies actual amounts recovered and the actual lifeline service discounts and any other lifeline service expenses incurred for the prior period. The company shall provide such data as necessary to enable the commission to validate such amounts to ensure that the company did not over recover its approved expenses form customers. The commission shall establish for each such company the timeframe for filing this report when the commission approves any such billing surcharge. The annual filing may be contained in a request to adjust the billing surcharge in accordance with paragraph (P)(1) or (P)(2) of this rule, but shall be provided via a separate filing and docketed in a generic case number to be established by the commission, if no adjustment to the billing surcharge is sought. Any over-recovery or under-recovery shall be offset against or added to the next year's recovery.

(S) Every ILEC ETC shall file with the commission in its annual assessment report the number of its customers who receive, at the time of filing of the report, lifeline service.

(T) Upon request of commission staff, additional information regarding customer subscription to and disconnection of lifeline service shall be provided to commission staff in accordance with rule 4901:1-6-30 of the Administrative Code.



FARMERS MUTUAL TELEPHONE COMPANY

A NATIONAL TELECOMMUNICATIONS COOPERATIVE ASSOCIATION MEMBER

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Lifeline and Link-Up: Affordable Telephone Service for Income-Eligible Consumers

Background

The federal Universal Service Fund (USF) supports the Lifeline Assistance and Link-Up America programs. These programs provide discounts on basic monthly service and initial installation or activation fees for telephone service at the primary residence to income-eligible consumers. The Federal Communications Commission (FCC), with the help of the Universal Service Administrative Company (USAC), administers the USF. Here are some frequently asked questions about the Lifeline and Link-Up programs.

What Benefits are Available Under the Lifeline and Link-Up Programs?

Lifeline Assistance provides discounts on basic monthly service at the primary residence for qualified telephone subscribers. These discounts can be up to \$10.00 per month, depending on your state. Link-Up America pays one-half (up to a maximum of \$30) of the initial installation fee for a traditional, wireline telephone or activation fee for a wireless telephone for a primary residence. It also allows participants to pay the remaining amount they owe on a deferred schedule, interest-free. Residents of Native American Indian and Alaska Native tribal communities may qualify for enhanced Lifeline assistance (up to an additional \$25.00) and expanded Link-Up support (up to an additional \$70.00). See our consumer fact sheet for more information on these enhanced Lifeline and Link-Up programs.

How Do I Qualify for Lifeline and Link-Up Discounts?

The Lifeline and Link-Up programs are available to qualifying consumers in every state, territory, and commonwealth. Eligibility criteria vary by state. States that have their own Lifeline program may have their own criteria. For states that rely solely on the federal Lifeline and Link-Up program eligibility criteria, subscribers must either have an income that is at or below 150% of the federal Poverty Guidelines, or participate in one of the following assistance programs (Customer signs documents certifying under penalty of perjury that he/she is receiving benefits from one of the following programs):

- Medicaid any program that might supplant Medicaid
- Food Stamps/SNAP
- SSI
- Federal Housing Assistance/Section 8
- Home Energy Assistance Program (HEAP, LIHEAP, E-HEAP)
- National School Lunch Program's Free Lunch Program (NSL)
- Household income at or below 150% of poverty level
- Ohio Works First/Temporary Assistance for Needy Families (TANF)
- General assistance, including disability assistance (DA)

Residents of Native American Indian and Alaska Native tribal communities qualify for enhanced Lifeline and Link-Up support if they meet one of the criteria listed above, qualify under their state's Lifeline program (if their state has its own Lifeline program), or participate in one of the following assistance programs:

- Bureau of Indian Affairs General Assistance,
- Tribally-Administered Temporary Assistance for Needy Families (TTANF), or
- Head Start (if income eligibility criteria are met).

The qualifying income in all federal default states except Alaska and Hawaii varies from a maximum of \$16,702 for a family of one to a maximum of \$56,445 for a family of eight. For each additional person in the household beyond eight, add \$5,730. To find the specific eligibility requirements for your state, visit the USAC Web. You may also call a toll free number - 1-888-641-8722 - to ask general questions about eligibility, but not to apply to participate in the Lifeline and Link-Up programs. To find out how to apply, visit the USAC Web site, or call your local telephone company.

You can also contact your local telephone company or your state public service commission for more information about these programs and to determine whether you qualify for discounts. Contact information for your state public service commission can be found on the Web site of the National Association of Regulatory Utility Commissioners, or in the blue pages or government section of your local telephone directory.

Who Pays for the Lifeline and Link-Up Programs?

All telecommunications service providers and certain other providers of telecommunications must contribute to the federal USF based on a percentage of their interstate and international end-user telecommunications revenues. These companies include wireline phone companies, wireless phone companies, paging service companies, and certain Voice over Internet Protocol (VoIP) providers.

Some consumers may notice a "Universal Service" line item on their telephone bills. This line item appears when a company chooses to recover its USF contributions directly from its customers by billing them this charge. The FCC does not require this charge to be passed on to customers. Each company makes a business decision about whether and how to assess charges to recover its Universal Service costs. These charges usually appear as a percentage of the consumer's phone bill. Companies that choose to collect Universal Service fees from their customers cannot collect an amount that exceeds their contribution to the USF. They also cannot collect from a Lifeline program participant USF fees on any services supported by universal service.

For More Information

For information about other telecommunications issues, visit the FCC's Consumer & Governmental Affairs Bureau Web site, or contact the FCC's Consumer Center by calling 1-888-CALL-FCC (1-888-225-5322) voice or 1-888-TELL-FCC (1-888-835-5322) TTY; faxing 1-866-418-0232; or writing to:

Federal Communications Commission
Consumer & Governmental Affairs Bureau
Consumer Inquiries and Complaints Division
445 12th Street, SW
Washington, DC 20554.

You can also view fact sheets on other FCC Universal Service programs on the FCC Web site at:

www.fcc.gov/cgb/consumerfacts/universalservice.html
www.fcc.gov/cgb/consumerfacts/usp_Schools.html
www.fcc.gov/cgb/consumerfacts/usp_RuralHealthcare.html
www.fcc.gov/cgb/consumerfacts/tribalfactsheet.html

Print Out

Lifeline and Link-Up: Affordable Telephone Service for Income-Eligible Consumers Guide (pdf)

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