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Robert Doar
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Administrative Directive

Section 1

Transmittal:	06-ADM-01
To:	Local District Commissioners
Issuing Division/Office :	Division of Employment and Transitional Supports
Date:	February 17, 2006
Subject:	LIFELINE Telephone Service
Suggested Distribution:	Temporary Assistance Directors; Food Stamp Directors; Medicaid Directors; WMS Coordinators; Staff Development Coordinators; Child Assistance Program Directors
Contact Person(s):	Temporary Assistance Bureau at 1-800-343-8859, extension 4-9344
Attachments:	None
Attachment Available On – Line:	

Filing References

Previous ADMs/INFs	Releases Cancelled	Dept. Regs.	Soc. Serv. Law & Other Legal Ref.	Manual Ref.	Misc. Ref.
				TASB Chapter 23, Section G	GIS 05TA/DC015

Section 2

I. Summary

This ADM informs districts that OTDA may release limited client information to a telephone service provider for the possible automatic enrollment in a discounted telephone service, known as “LIFELINE” and instructs districts on the proper measures that must be followed to ensure that client confidentiality is not compromised when OTDA releases this information.

Language has been added to the “Common Application” (LDSS-2921), “Food Stamp Benefits Application/Recertification” (LDSS-4826) and the “Recertification” form (LDSS-3174) that allows TA and FS applicants and recipients the ability to record their choice regarding the release of their information by OTDA to the telephone service provider.

II. Purpose

The purpose of this ADM is to inform districts of the discounted telephone service available from telephone service providers for low-income households and the proper procedures districts must follow to ensure that OTDA does not release information for persons who do not want this information provided to their local telephone service provider.

III. Background

For several years OTDA had an agreement with Verizon (and its predecessors) to release recipient information for the purpose of automatic enrollment in Verizon’s discounted telephone service (LIFELINE). Verizon terminated the agreement for technical reasons. During the negotiations for the new agreement, OTDA had to ensure that client confidentiality was preserved and that no unauthorized dissemination of client information occurred. Although Verizon is the only telephone company to date that has requested recipient information from OTDA for possible automatic enrollment, any telephone company could request this of OTDA. Any future agreement that OTDA enters into with a telephone service provider, who is requesting client information for the purpose of possible automatic enrollment in a discounted telephone service program, must ensure that a client’s confidentiality is protected .

IV. Program Implications

LIFELINE service can significantly reduce the telephone service expense of a low-income household. It is to the advantage of low-income persons to become enrolled in this service through their telephone service provider. Districts should strongly encourage that recipients apply for LIFELINE service through their telephone service provider in order to reduce telephone expenses. However, negative action cannot be taken against a case for failure to apply for or allow the release of client information for LIFELINE service.

To ensure that information is not improperly released by OTDA, certain procedures must be followed to ensure that the client’s confidentiality is protected.

The release of client information by OTDA is limited to the name and address of recipients of TA and FS. Recipients of Medicaid (MA)-only and HEAP-only are excluded from this process, but can apply for LIFELINE service by contacting their local telephone service provider.

The release of client information to Verizon does not guarantee the automatic enrollment of all TA and FS recipients in their LIFELINE service program at any given time. However, the periodic release of such information will enable most TA and FS recipients to be contacted by Verizon for possible automatic enrollment at some point.

TA and FS recipients must be afforded the opportunity to “opt-out” of the release of recipient information by OTDA to Verizon for possible automatic enrollment in LIFELINE service.

A recipient of any low-income program, including Medicaid (MA), can apply for LIFELINE service by directly contacting their local telephone service provider at any time. Additionally, an individual need not be in receipt of benefits from a low-income program to receive LIFELINE service. An individual meeting income guidelines may also be eligible.

The following forms and publications include LIFELINE information:

- “What You Should Know About Social Services Programs Questions and Answers-Book 2” (LDSS-4148B);
- “How to Complete the Temporary Assistance (TA)-Medical Assistance (MA)-Medicare Savings Program (MSP)-Food Stamp Benefits (FS)-Services (S), including Foster Care (FC)-Child Care Assistance (CC) Application” (LDSS-1301);
- “Application For: Temporary Assistance (TA)-Medical Assistance (MA)-Medicare Savings Program (MSP)-Food Stamp Benefits (FS)-Services (S), including Foster Care (FC)-Child Care Assistance (CC)” (LDSS-2921);
- “How to Complete the Temporary Assistance (TA)-Medical Assistance (MA)-Medicare Savings Program (MSP)-Food Stamp Benefits (FS) Recertification Form” (LDSS-1313);
- Recertification Form For: Temporary Assistance (TA)-Medical Assistance (MA)-Medicare Savings Program (MSP)-Food Stamp Benefits (FS)” (LDSS-3174);
- “How to Complete the Food Stamp Benefits Application/Recertification” (LDSS-4826A); and
- “Food Stamp Benefits Application/Recertification” (LDSS-4826).

V. Required Action

TA and FS applicants and recipients must be afforded the opportunity to “opt-out” of the release of client information by OTDA to their local telephone service provider. Therefore, language has been added to the “Common Application” (LDSS-2921), “Food Stamp Benefits Application/Recertification” (LDSS-4826) and “Recertification” (LDSS-3174) form that will allow TA and FS applicants and recipients to “opt-out” of OTDA’s releasing information to their local telephone service provider. There is an authorization notice on these forms that explains what information will be released by OTDA and the purpose for the released information. The checkbox to indicate the client’s desire not to release the information is also included in this authorization notice.

- If the applicant/recipient has checked the checkbox on the application or recertification form this indicates that the applicant/recipient does not want their information released. For all counties excluding NYC, workers must enter an “N” in the “LFLN” field of the APP-TAD and/or on WMS Screen 1 during Full Data Entry (FDE) to prevent the release of information. NYC specifications are below. The worker must enter an “N” in the “LFLN” field of the APP-TAD and/or on WMS Screen 1 during Full Data Entry (FDE) to prevent the release of information.

- If the checkbox is blank, this indicates that the applicant/recipient agrees to have their information released to the telephone service provider for possible automatic enrollment in the LIFELINE discounted telephone service. The worker does not need to take action since a blank “LFLN” field will allow the release of recipient information to the telephone service provider.

No further action is required by the local district social services (LDSS) until such time that the recipient indicates a change in their decision to have information released to the telephone service provider. Recipients can indicate a change in their decision at the next recertification or at any time. They can decide at any time to change their prior choice and either participate in the release of their information for possible enrollment of LIFELINE services or to be excluded from the sharing of information procedure. The worker must comply with the request and take the appropriate action, as defined above.

VI. Systems Implications

Upstate

A LIFELINE data element input field (“LFLN”) has been added to Section 1 of the WMS Application Turnaround Document (APP-TAD) (LDSS-3636) and to the WMS Authorization Document (LDSS-3209). This “LFLN” field is located to the right of the “TRACKING” fields.

Upon successful completion of FDE of the APP-TAD or Authorization Document, a new Authorization Form (LDSS-3209) will be produced with the “LFLN” field blank or displaying an “N” to indicate the clients choice.

New York City

A LIFELINE data element input field (“LFLN”) has been added to Worker Mode Application Data screen NAPP05. The “LFLN” field can be modified through the Eligibility and Undercare subsystems using the ancillary document, Lifeline Participation Code Data Entry Form (LDSS-4855). The LIFELINE field will NOT be displayed on the WMS/NYC Authorization Turnaround Document (LDSS-3517). The “LFLN” field and value (blank or “N”) is accessible by the worker from the following WMS Inquiry screens: NQCS01 (Case Composition – Suffix/Individual Information), NQCS02 (Case Composition – Suffix Summary), NQCS3A (Current Case Composition – Historical Suffix Information), and NQCS3B (Case Composition – Individual Summary as of mm/dd/yy).

VII. Additional Information

Under federal rules, Verizon and other telephone companies are required to annually revalidate the eligibility of customers who receive LIFELINE telephone service. Verizon mails notices to their

LIFELINE customers requesting that they verify income eligibility for the discounted service. The customer is directed to complete a form and submit proof of continued eligibility. Customers that do not return the documentation for continued enrollment are at risk of losing this benefit. Verizon has developed a poster explaining the revalidation process, which is available to local districts. Districts have the option of whether or not to display the posters in their lobbies. Any questions regarding the revalidation process or related to LIFELINE service must be directed to the client's telephone service provider.

Any agreements with telephone providers for a similar process must be submitted to the Office of Temporary and Disability Assistance, Office of Counsel, for approval at 40 North Pearl Street, Albany, NY 12243.

VIII. Effective Date

This directive is effective immediately; districts must begin to enter Lifeline choice data into WMS immediately.

Issued By _____

Name: **Russell Sykes**
Title: **Deputy Commissioner**
Division/Office: **Division of Employment and Transitional Supports**