

June 13, 2005

Via Hand Delivery

Ms. Reneé J. Jenkins
Director of Administration
Secretary of the Public Utilities Commission of Ohio
180 East Broad Street
Columbus, Ohio 43215

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PUCO

RE: In the Matter of a Proceeding to Implement Lifeline Assistance Modifications as a Result of a
Federal Communications Commission Order
PUCO Case No. 05-461-TP-UNC

Dear Ms. Jenkins:

Enclosed are an original and four (4) copies of final tariff sheets to be filed on behalf of Sherwood Mutual Telephone Association, Inc. in the above-captioned matter. The TRF Number for Sherwood Mutual Telephone Association, Inc. is 90-5037-TP-TRF.

Thank you for your assistance. If you have any questions, please do not hesitate to call.

Very truly yours,



Carolyn S. Flahive

Enclosure

cc: Jennifer Reed, Specialist

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THE SHERWOOD MUTUAL TELEPHONE ASSOCIATION, INC.
SHERWOOD, OHIO

SECTION 7
TARIFF SPECIFIC INDEX
1ST REVISED SHEET NO. 1
REPLACES ORIGINAL SHEET NO. 1

P.U.C.O. NO. 4
BASIC TELEPHONE ASSISTANCE

<u>SUBJECT</u>	<u>SHEET NO.</u>	
Service Connection Assistance	1	
Link Up	4	(T)
Lifeline Assistance	6	(T)

ISSUED: May 13, 2005

EFFECTIVE: June 13, 2005

In Accordance With Case No. 05-461-TP-UNC
Issued by the Public Utilities Commission of Ohio
Michael J. Woodring, General Manager
Sherwood, Ohio

P.U.C.O. NO. 4
GENERAL EXCHANGE

BASIC TELEPHONE ASSISTANCE

I. SERVICE CONNECTION ASSISTANCE

A. General

Service Connection Assistance is a telephone assistance program that provides certain eligible residential customers requesting local exchange service with the following benefits:

- o Waiver of applicable deposit requirements under Section 3 of this tariff.
- o Full or partial waiver of applicable service connection charges for establishing or re-establishing local exchange service as described in Section 2 of this tariff (Service Connection Assistance does not apply to network wiring charges).

B. Regulations

1. Service Connection Assistance is a basic local exchange residential service offering available to customers who are currently participating in one of the following assistance programs:

(a) Home Energy Assistance Program (HEAP);

(D)

(D)

(b) Supplemental Security Income (SSI) under Title XVI of the Social Security Act;

(c) Food Stamps;

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- (d) Federal public housing assistance/Section 8; or (T)
- (e) Medical Assistance under Chapter 5111 of the Ohio Revised Code (Medicaid).
- 2. The Telephone Company shall require, as proof of eligibility for Service Connection Assistance, a document signed by the customer, certifying under penalty of perjury that the customer is receiving benefits from one of the programs identified in Section I.B.1, above; identifying the specific program or programs from which the customer receives benefits. (T)
- 3. Customers of Service Connection Assistance cannot be a dependent (as defined by the Federal Income Tax Code) under the age of 60.
- 4. Service Connection Assistance is available for all grades of service.
- 5. Service Connection Assistance is available for a single telephone line at the customer's principal place of residence. (T)
- 6. Service Connection Assistance shall be available to eligible customers not more than once in a one-year period at the same address. Customers must pay or make arrangements to pay to the Telephone Company any outstanding bills for regulated telephone services in the customer's name, and no other members of the household may owe money for such services previously provided at the customer's current address.
- 7. Service Connection Assistance customers are not restricted on the optional services to which they may subscribe.

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BASIC TELEPHONE ASSISTANCE

III. LINK UP

A. General

Link Up is a federal assistance program that provides eligible residential customers with the following benefits:

- o A reduction of the Telephone Company's applicable service connection charges equal to one-half of such service connection charges, or \$30.00, whichever is less.
- o A deferred payment plan for service connection charges, for which the customer does not pay interest, where such service connection charges do not exceed \$200.00 and the payment plan does not exceed 12 months duration. (Service Connection charges do not include the Telephone Company's applicable security deposit requirements.)

B. Regulations

1. Link Up Assistance is available to residential customers who are currently participating in one of the following assistance programs:
 - (a) Medical Assistance under Chapter 5111 of the Ohio Revised Code (Medicaid);
 - (b) Food stamps;
 - (c) Supplemental Security Income (SSI) under Title XVI of the Social Security Act;
 - (d) Federal public housing assistance, or Section 8;
 - (e) Home Energy Assistance Program (HEAP); (T) (M)
 - (f) National School Lunch Program's Free Lunch Program (NSL); (N)
 - (g) Household income at or below 135% of the poverty level; or (N)
 - (h) Ohio Works First/Temporary Assistance for Needy Families (TANF). (N)

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III. LINK UP (Con't)

B. Regulations (Con't)

2. A customer eligible for Link Up may choose one or both of the Link Up benefits identified in Section III.A., above.
3. The Telephone Company shall require, as proof of eligibility for Link Up Assistance, a document signed by the customer, certifying under penalty of perjury that the customer is receiving benefits from one of the programs identified in Section III.B.1., above; identifying the specific program or programs from which the customer receives benefits. If a customer is applying for both Link Up and Lifeline, such customer may utilize the same document to verify eligibility for both programs. If the customer is applying for Link-Up based on income Section III.B.1.g., examples of income documentation would be 1) the prior year's state or federal income tax return; 2) a current income statement from an employer or W-2; 3) three consecutive months worth of the most current pay stubs; 4) the most recent Social Security statement of benefits; 5) the most recent Veteran's Administration statement of benefits; 6) the most recent retirement/pension statement of benefits; 7) the most recent Unemployment/Workmen's Compensation statement of benefits; 8) a divorce decree or child support document.
4. The Telephone Company's Link Up program shall allow a qualifying low-income consumer to receive the benefit of the Link Up program for a second or subsequent time only for a principal place of residence with an address different from the residence address at which the Link Up assistance was provided previously.
5. Link Up customers are not restricted on the optional services to which they may subscribe.
6. If a customer disagrees with a company's findings regarding eligibility for Link-Up, the customer may file an informal/formal complaint with the Public Utilities Commission of Ohio.

(T)

(N)

(N)

(N)

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BASIC TELEPHONE ASSISTANCE

IV. LIFELINE ASSISTANCE

A. General

Lifeline Assistance is a federal support program that provides eligible customers with the following benefits:

- o A waiver of the Federal Subscriber Line Charge.
- o A reduction of \$1.75 off the customer's monthly basic local service charges.
- o Free toll limitation services (e.g., toll blocking, toll control), upon customer's request.
- o A waiver of the Telephone Company's service deposit requirement, if the customer elects to receive toll blocking.
- o Optional service like Caller ID and Call Waiting are not restricted. (N)

B. Regulations

1. Lifeline Assistance is available to residential customers who are currently participating in one of the following assistance programs:
 - (a) Medical Assistance under Chapter 5111 of the Ohio Revised Code (Medicaid);
 - (b) Food stamps;
 - (c) Supplemental Security Income (SSI) under Title XVI of the Social Security Act;
 - (d) Federal public housing assistance, or Section 8;
 - (e) Home Energy Assistance Program (HEAP); (T) (M)
 - (f) National School Lunch Free Lunch Program; (N)
 - (g) Household income at or below 135% of the poverty level; or (N)
 - (h) Ohio Works First/Temporary Assistance for Needy Families (TANF). (N)

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IV. LIFELINE ASSISTANCE (Con't)

B. Regulations (Con't)

2. Consumers participating in this program may receive service connection and deposit waivers through Link-Up. (N)
3. Participants in Lifeline Assistance shall not be disconnected from local service for non-payment of toll charges. In addition, the Company will not deny re-establishment of local service to customers who are eligible for Lifeline Assistance and have previously been disconnected for non-payment of toll charges.
4. Partial payments that are received from Lifeline customers will first be applied to local service charges and then to any outstanding toll charges.
5. The Telephone Company shall require, as proof of eligibility for Lifeline Assistance, a document signed by the customer, certifying under penalty of perjury that the customer is receiving benefits from one of the programs identified in Section IV.B.1., above; identifying the specific program or programs from which the customer receives benefits, and agreeing to notify the carrier if the customer ceases to participate in such program or programs. If a customer is applying for both Lifeline and Link Up, such customer may utilize the same document to verify eligibility for both programs. If the customer is applying for Lifeline based on income Section IV.B.1.g., examples of income documentation would be 1) the prior year's state or federal income tax return; 2) a current income statement from an employer or W-2; 3) three consecutive months worth of the most current pay stubs; 4) the most recent Social Security statement of benefits; 5) the most recent Veteran's Administration statement of benefits; 6) the most recent retirement/pension statement of benefits; 7) the most recent Unemployment/Workmen's Compensation statement of benefits; 8) a divorce decree or child support document. (N)
(N)
6. At no time will the monthly basic local exchange service charge less the discount cause the local service rates to be less than zero. (T)
7. The Telephone Company shall perform a verification audit of a customer receiving Lifeline Assistance. (N)
8. The Lifeline discounts and waivers apply to only one access line per household. (N)

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IV. LIFELINE ASSISTANCE (Con't)

C. Enrollment Process

(N)

1. Existing Customers

- (a) Customers with dial tone wanting to establish lifeline service should complete and submit a Company lifeline application, and provide documentation if applicable, within 15 business days of requesting the discount.
- (b) The Company will review the customer's lifeline application to determine customer's eligibility within 15 days.
- (c) If the customer is eligible for the lifeline discount, the Company will credit the customer's bill retroactive to the date of customer's request for lifeline service.
- (d) If the customer does not return the application with the appropriate documentation, if required, within 15 business days, the customer will need to re-apply for lifeline discounts. Should the Company determine that a customer does not qualify for lifeline assistance or if the customer submits incomplete documentation, the Company will provide written notification to the customer and give the customer an additional 30 days to prove eligibility. If after that additional 30 days the customer has failed to prove eligibility or provide the necessary documentation, the customer must re-apply for the lifeline discounts.

2. New Customers

- (a) Customers applying for new service and requesting to establish lifeline service should complete and submit a Company lifeline application, and provide documentation if applicable, within 15 business days of requesting the discount. The Company will process the lifeline application without delaying the installation of new service.
- (b) The Company will review the customer's lifeline application to determine the customer's eligibility within 15 days.
- (c) If the customer is eligible for the lifeline discount, the Company will credit the customer's bill for installation charges and the monthly discount retroactive to the date the customer's service is established.
- (d) If the customer does not return the application with the appropriate documentation, if required, within 15 business days, the customer will need to re-apply for lifeline discounts. Should the Company determine that a customer does not qualify for lifeline assistance or if the customer submits incomplete documentation, the Company will provide written notification to the customer and give the customer an additional 30 days to prove eligibility. If after that additional 30 days the customer has failed to prove eligibility or provide the necessary documentation, the customer must re-apply for the lifeline discounts.

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IV. LIFELINE ASSISTANCE (Con't)

D. Income Eligibility

1. The Telephone Company must verify through acceptable documentation that a customer qualifies for Lifeline Assistance. Such verification must be performed within 60 days of a customer's service establishment. Examples of documentation would include 1) the prior year's state or federal income tax return; 2) a current income statement from an employer or W-2; 3) three consecutive months worth of the most current pay stubs; 4) the most recent Social Security statement of benefits; 5) the most recent Veteran's Administration statement of benefits; 6) the most recent retirement/pension statement of benefits; 7) the most recent Unemployment/ Workmen's Compensation statement of benefits; 8) a divorce decree or child support document.
2. Regardless of when the Company completes the verification process lifeline benefits shall go back to the date the qualified customer requested lifeline service or established new service.
3. The Telephone Company shall provide written notification to customers that do not qualify for Lifeline Assistance. The notice shall give the customer an additional 30 day opportunity to prove eligibility or dispute the Company's determination. If after that additional 30 days the customer has failed to prove eligibility or provide the necessary documentation, the customer must re-apply for the lifeline discounts.
4. The Telephone Company shall give customers who do not qualify for lifeline assistance the option of spreading installation charges over three months consistent with Chapter 4901:1-5, O.A.C.
5. Written notification must include 1) the earliest date termination of lifeline benefits will occur if the customer has been receiving the benefits or the last date the customer has to provide documentation to prove eligibility to receive the benefits; 2) the reason(s) for termination of lifeline benefits and any actions which the customer must take to demonstrate continued eligibility; 3) contact information for the Telephone Company; and 4) a statement consistent with the disconnect notice set forth in Chapter 4901:1-5, O.A.C., explaining who customers may contact in the event of a dispute.
6. If a customer disagrees with the Company's findings regarding eligibility for lifeline, the customer may file an informal/formal complaint with the Public Utilities Commission of Ohio.

(N)

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IV. LIFELINE ASSISTANCE (Con't)

E. Verification for Continued Eligibility

(N)

1. The Telephone Company must notify customers at least 60 days prior to the Company's pending termination of the customer's Lifeline Assistance if the customer fails to submit acceptable documentation for continued eligibility for benefits. Such notice will be separate from the bill and will include: 1) the earliest date termination of lifeline benefits would occur; 2) the reason(s) for the termination of lifeline benefits and any actions which the customer must take to demonstrate continued eligibility; 3) contact information for the Telephone Company and 4) a statement consistent with the disconnect notice requirements outlined in the MTSS Chapter 4901:1-5, O.A.C., explaining who the customer should contact in the event of a dispute.
2. Should a customer fail to submit proper documentation within the 60 day period, the Telephone Company will terminate the customer's lifeline benefits and require the customer to re-apply.
3. If a customer disagrees with the Company's findings regarding eligibility for Lifeline Assistance, the customer may file an informal/formal complaint with the Public Utilities Commission of Ohio.

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