



CA LifeLine Renewal Recommendations

November, 2018

#MoveForward

Mailing Address Change – allow customers to provide change of address to CA PUC



Current State

CA Lifeline customers must contact the service provider to update their mailing address information

Issue

Customers may not be aware they need to contact the service provider before their renewal period. The % of customers that proactively contacted us to report a move are far less than the national average (25% of renters and 9% of home owners move annually). The concern is that our customers are moving at the same rate but are not providing their new address which is impacting their ability to renew service

Proposed Options

Allow both the service provider and CA PUC the ability to capture address changes and exchange the data between the service provider and CA PUC

- Allow customers to call the CA PUC and provide their address change
- Allow customers to update their address on the renewal form

documentation with your renewal form.

Step 1 Check your name, address, and phone number.

Call your phone company to report any mistakes **within 30 days**. The phone company will fix them. Corrections on this sheet will NOT be accepted.

Billing Address
JOHN SAMPLE
123 SAMPLE ST
SAMPLE CITY, CA 99999

Applicant's Phone Number: 555-555-5555
Anniversary Date: 05/15/2019
PIN: 1234
CARRIER A's Phone Number: 777-777-7777

Permanent Service Address
JOHN SAMPLE
123 SAMPLE ST
SAMPLE CITY, CA 99999

Page 2 of 8

PIN – offer others ways to authenticate



Current State

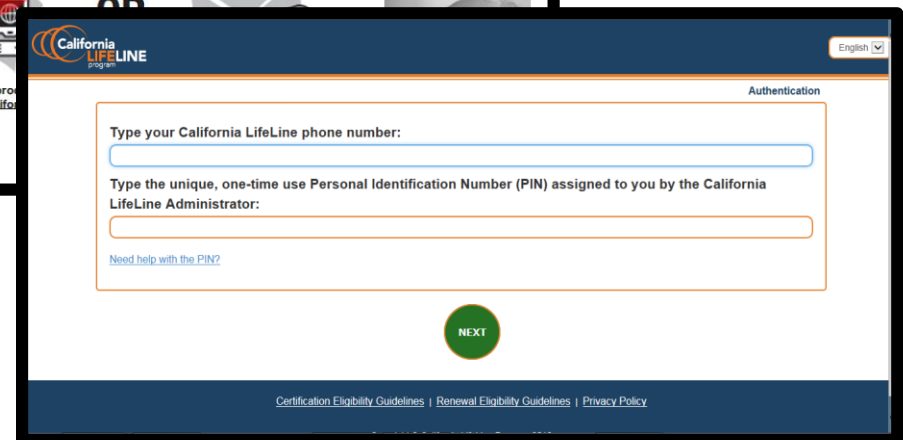
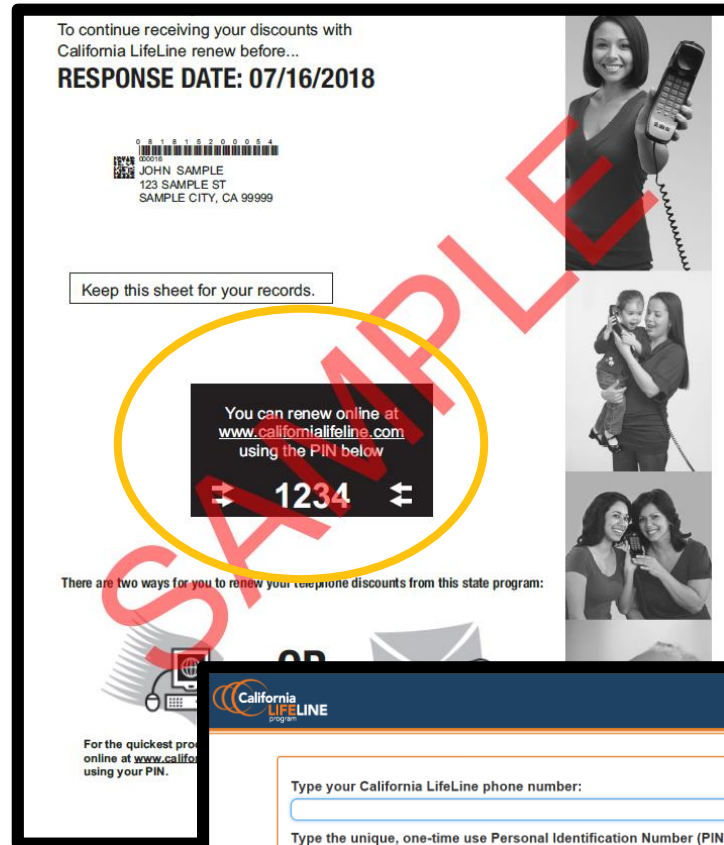
A PIN from the CA PUC is required in order for CA LifeLine customers to renew service

Issue

If a customer loses the document with the PIN information or moves with no forwarding address and is not aware there is the Live Chat option, they are not able to complete the renewal form and fail to renew service

Proposed Options

- Allow an alternate option to authenticate using the DOB and last 4 digits of their SSN
- If identity verification alternative to PIN is not available, recommend to display Live Chat option on the web page



#MoveForward

Renewal Period – extend period or change communication to clearly articulate renewal period



Current State

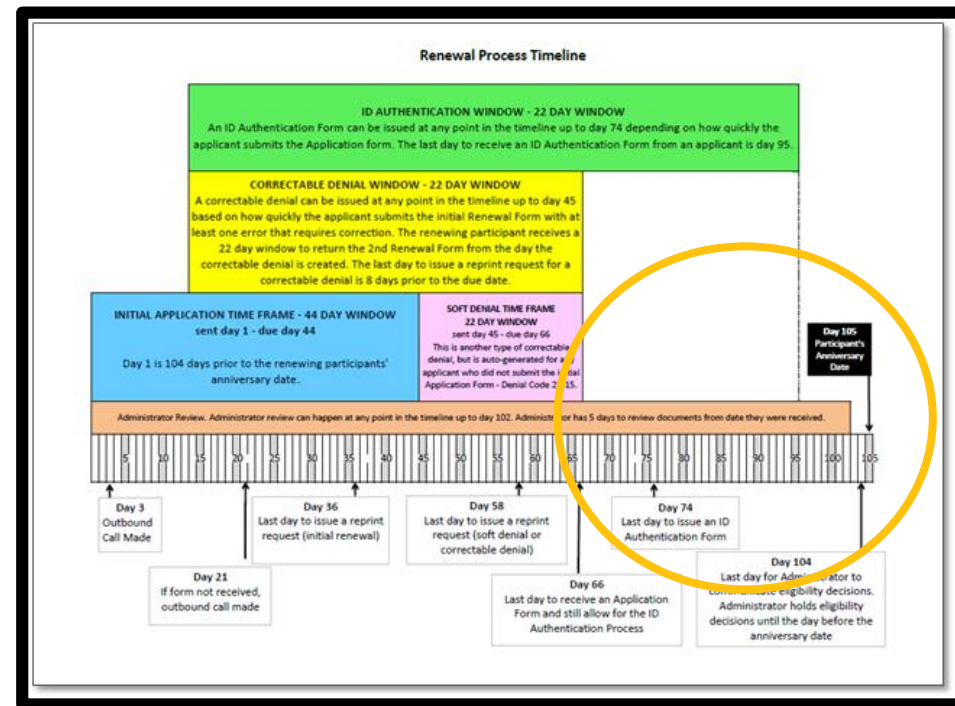
The time period in which customers need to renew by is limited. Customer's Anniversary date is much later than the renewal period.

Issue

Customers may not be aware they need to complete the renewal form months before their Anniversary date and attempt to respond too late in the process.

Proposed Options

- Allow a longer renewal period – up to and including their Anniversary date
- Provide clear instructions on when the renewal period ends and when the effective date is (Example: To continue your free LifeLine service after 4/1/19, you must complete and submit the renewal form by February 21, 2019)
 - CA PUC should share the renewal period dates to the providers so we are consistent in our messaging



#MoveForward

Correctable Denials – allow more than one correction during the renewal period



Current State

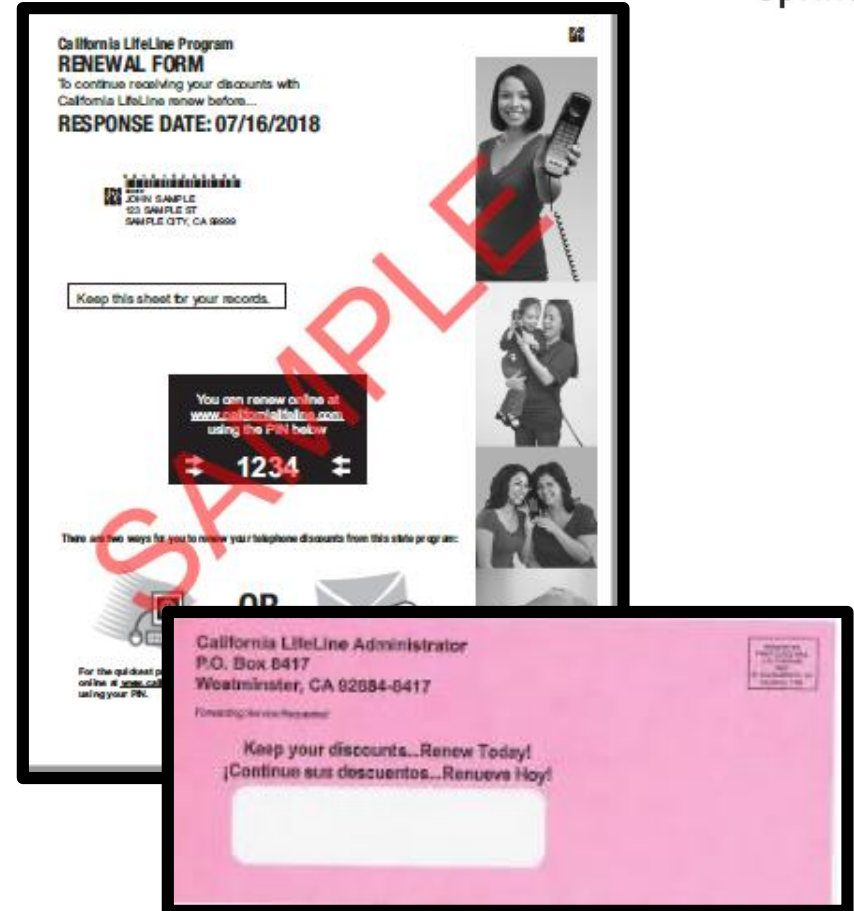
If something is incorrect on the renewal form, the customer is sent a new renewal form to complete. If the revised form is not correct, the customer is not sent another form

Issue

Customers must complete the entire form again and if it is not correct, they fail to renew LifeLine service

Proposed Options

- Allow customers multiple correctable denials within the renewal period
 - Create a process in which the customer must correct ONLY the section(s) that are incorrect
 - Clearly mark on the envelope that additional information is needed so customers take action
- If there is no visible distinction between the first pink envelope renewal form and subsequent pink envelopes that are sent to correct prior errors, it may lead customers to believe that the subsequent forms are duplicates and discard them



#MoveForward

Include all channels to renew service



Current State

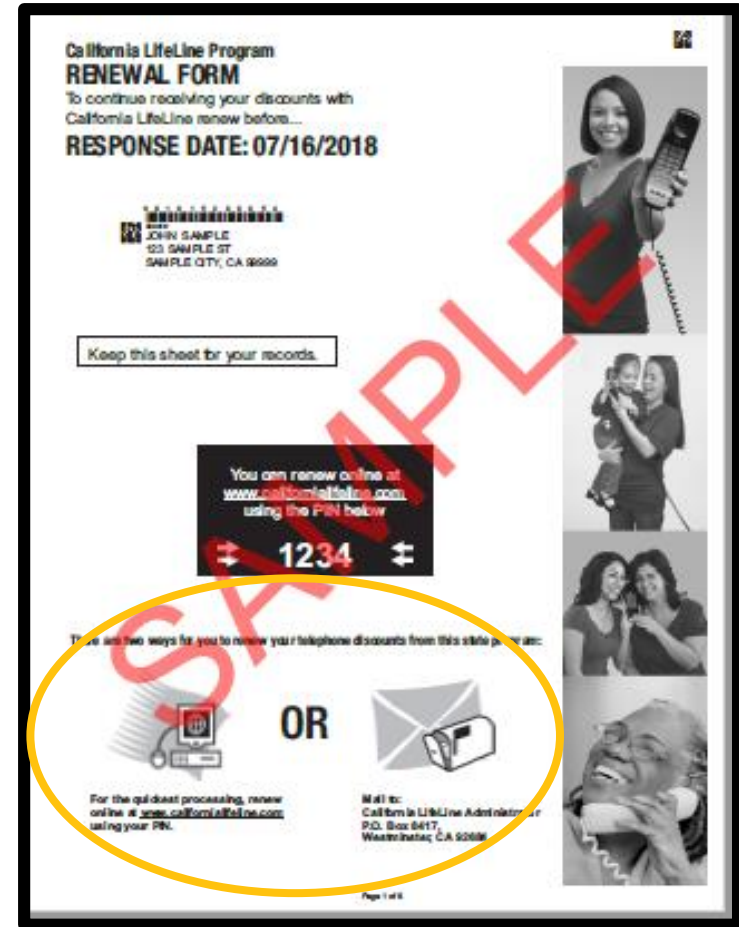
The Renewal form does not include IVR as an option to renew

Issue

Limits ways customers can renew service

Proposed Options

- Include all channels to renew service on all outreach communications to increase renewal rate
- Share all CA PUC outreach content with service providers to ensure we are using similar language to avoid confusing the customer



#MoveForward

Additional Information



#MoveForward

Recommendations for WES (Renewal)



- This is the “Need Help with the PIN?” screen
- Since the PIN can also be obtained via Live Chat, recommend adding this as option within list below



WES
Page 2

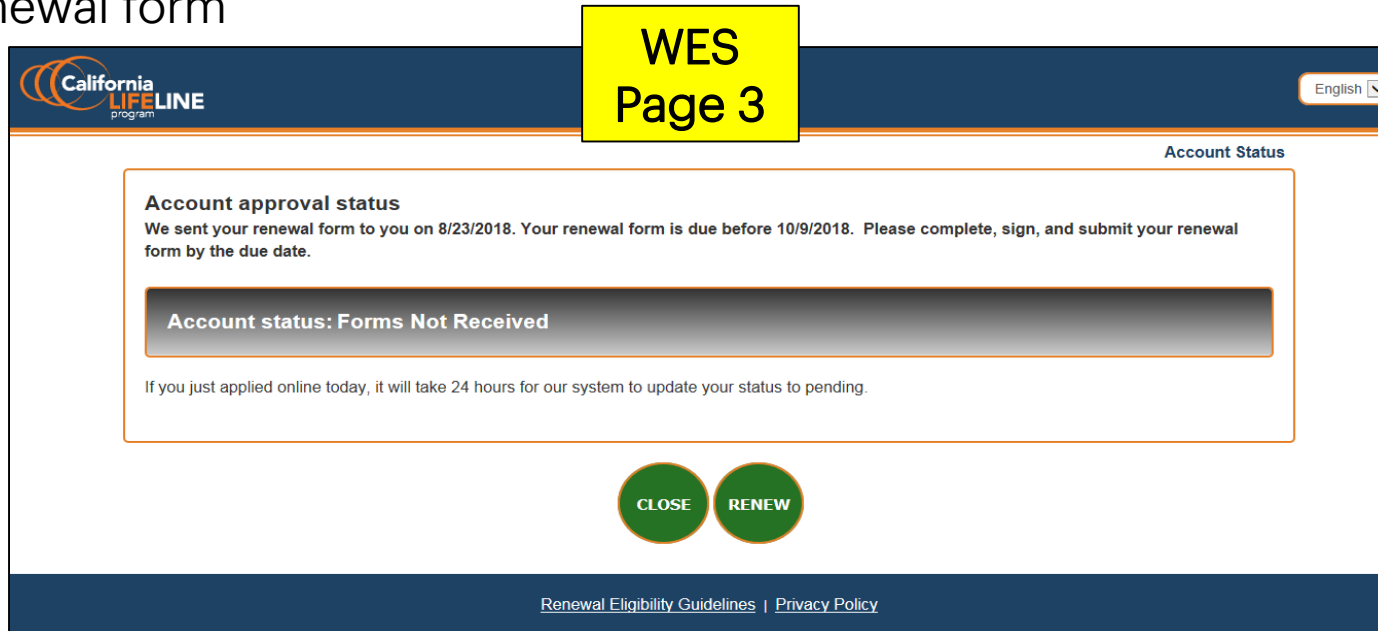
Please contact us to get your PIN and/or Enrollment Code. We are available Monday to Friday 7 a.m. to 7 p.m. except during state holidays.

- Contact the LifeLine Call Center for general information about the California LifeLine program.
- The LifeLine Call Center can also help find telephone companies that offer California LifeLine and connect consumers to these California LifeLine approved telephone companies.
- If a consumer wants in-language help for a language not listed below, call the English toll-free number and ask for interpretation services.
- Call the applicable telephone number below:

English	1-866-272-0349
Spanish	1-866-272-0350
Laotian/Hmong	1-866-272-0351
Cambodian	1-866-272-0352
Tagalog	1-866-272-0353
Korean	1-866-272-0354
Vietnamese	1-866-272-0355
Chinese (Mandarin/Cantonese)	1-866-272-0356
Japanese	1-866-296-0860
TTY	1-866-272-0358

Recommendations for WES (Renewal)

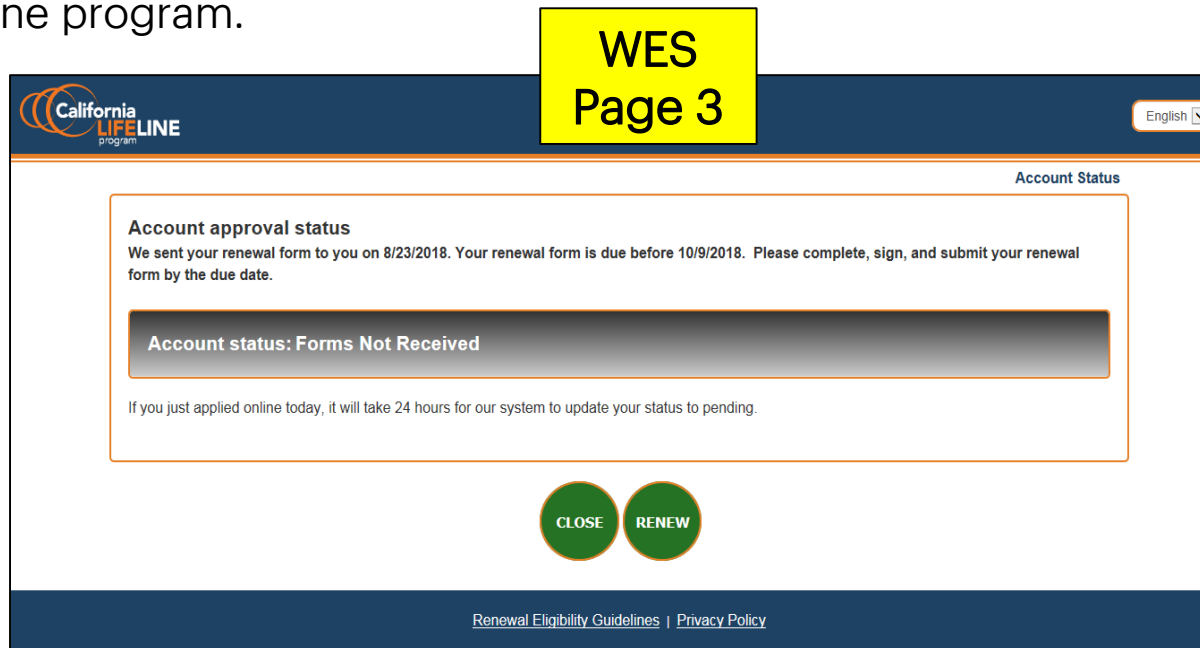
- Recommend consistent wording to minimize potential customer confusion:
 - To illustrate: instead of “approval”, use “renewal” (since body copy says “We sent your renewal form to you...”)
- Recommend modifications to the headline copy because as shown, headline may cause confusion
- To illustrate: although it provides status regarding the renewal form, the customer can actually renew online, therefore negating need to mention a “renewal form”



The screenshot shows a web page titled "WES Page 3" with a yellow highlight. The page header includes the "California Lifeline program" logo and a language dropdown set to "English". The main content area is titled "Account Status" and contains a message about account approval status. The message states: "Account approval status. We sent your renewal form to you on 8/23/2018. Your renewal form is due before 10/9/2018. Please complete, sign, and submit your renewal form by the due date." Below this is a grey box with the text "Account status: Forms Not Received". A note below the box says: "If you just applied online today, it will take 24 hours for our system to update your status to pending." At the bottom of the message box are two green buttons: "CLOSE" and "RENEW". The footer of the page includes links for "Renewal Eligibility Guidelines" and "Privacy Policy".

Recommendations for WES (Renewal)

- Recommend updating this page to drive more “call-to-action”
 - To illustrate: although paper renewal form not received, customer can renew online now by clicking “Renew”
- To encourage customers to Renew, recommend that the “Renew” button is green (or larger) and a less emphatic color used for Close, instead of both being green (and same size/prominence)
- After the reference to complete, sign and submit the renewal by the due date, include in bold lettering that failure to due so will result in removal from the CA LifeLine program.



The screenshot shows a web page titled "WES Page 3" with a yellow callout box. The page header includes the "California LIFELINE program" logo and a language dropdown menu set to "English". The main content area is titled "Account Status" and contains the following text:

Account approval status
We sent your renewal form to you on 8/23/2018. Your renewal form is due before 10/9/2018. Please complete, sign, and submit your renewal form by the due date.

Account status: Forms Not Received

If you just applied online today, it will take 24 hours for our system to update your status to pending.

At the bottom of the content area, there are two circular buttons: "CLOSE" and "RENEW". The "RENEW" button is green, while the "CLOSE" button is a lighter shade of green. The footer of the page contains links for "Renewal Eligibility Guidelines" and "Privacy Policy".

Recommendations for WES (Renewal)



- Recommend using a more comprehensive step counter since the subscriber has already completed several steps of the Renewal process by the time they reach this slide, noted as “Page 1 of 5”

**WES
Page 4**

California **LIFELINE** program

English ▾

Page 1 of 5 Authentication

Choose your name from the list below.

- Aw Smstest1
- Micheal Repka
- Tom Miller
- Wuifhafjha luhdfkjhasf
- Other

NEXT

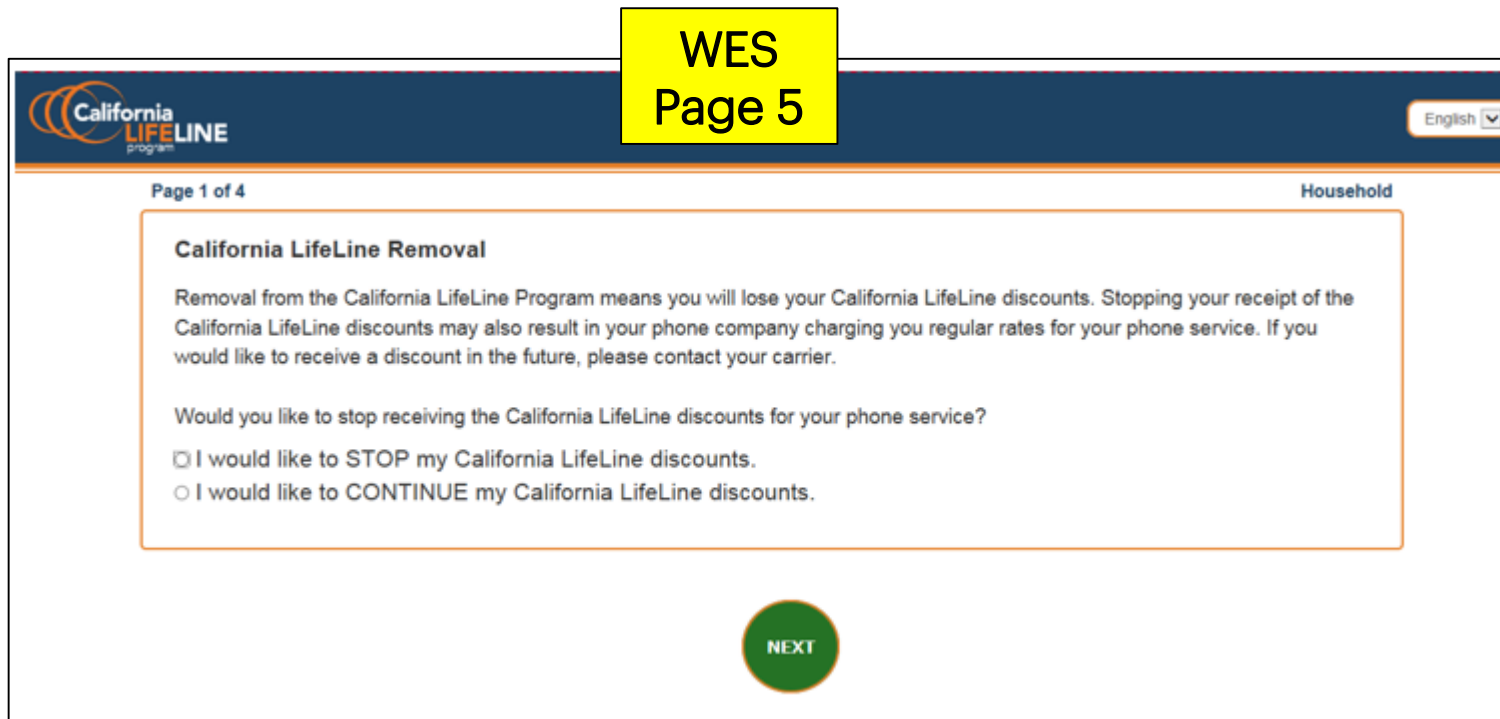
[Renewal Eligibility Guidelines](#) | [Privacy Policy](#)

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Recommendations for WES (Renewal)

- Although the subscriber is now in a different module of the Renewal process (i.e., Household), the resetting of the step counter could be confusing
- As noted on prior slide, recommend a more comprehensive step counter for the full renewal process

WES
Page 5



California LifeLine program

English

Page 1 of 4 Household

California LifeLine Removal

Removal from the California LifeLine Program means you will lose your California LifeLine discounts. Stopping your receipt of the California LifeLine discounts may also result in your phone company charging you regular rates for your phone service. If you would like to receive a discount in the future, please contact your carrier.

Would you like to stop receiving the California LifeLine discounts for your phone service?

I would like to STOP my California LifeLine discounts.

I would like to CONTINUE my California LifeLine discounts.

NEXT



Recommendations for WES (Renewal)

- Since headline leads with the word “Removal”, may be confusing and drive Removal requests instead of Renewals
- Similarly, recommend that the radio button options start with the first option being: I would like to CONTINUE...instead of I would like to STOP...
- For the STOP button choice, recommend serving the subscriber with a “Are you sure you want to STOP...” option before the subscriber continues

California LifeLine Program

English

Page 1 of 4 Household

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NEXT