



California Teleconnect Fund



About the California Teleconnect Fund (CTF)

CTF is a program run by the California Public Utilities Commission (CPUC) that provides a 25% off voice services and a 50% discount for broadband on select communication services for schools, libraries, hospitals, nonprofit organizations and about 7,000 Community Based Organizations (CBOs).

The program was established by Decision 96-10-066 on October 25, 1996. In this decision, the California Public Utilities Commission reaffirmed its commitment to universal service, and created the CTF program in accordance with state and federal directives. The program is funded through a surcharge on all customers that purchase intrastate telecommunications services.

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CTF Certified VoIP and UCaaS Solutions

Powered by a team with over 40 years of experience together, UniVoIP is a pioneering leader offering CTF Certified VoIP and UCaaS (Unified Communications as a Service) solutions for organizations nationwide.

UniVoIP offers comprehensive business communication platforms, multimedia contact center functionality, cloud-based collaborative and productivity tools, mobility applications, custom application integration with existing business systems and a world-renowned suite of advanced IP phones with mobile integration functionality.

Key Benefits of UniVoIP's solutions

Exponential Savings – No initial investment and low monthly rates. Instantly save when you upgrade or move to a new location and happily avoid dropping a ton of money on purchasing new phones across the board. Oh, and no hidden fees too.

Future Proof – Receive free upgrades for life and never get stuck with an outdated system. All updates are piped to your phones at no charge. Plus life-time warranties on each unit.

Geographical Flexibility – Receive service wherever, whenever. Take that meeting in Kyoto, while picking up that call from NY, wherever there's an internet connection, you'll have phone service.

Local Presence – Create outposts by setting a local phone number in any city and appear to have offices in that location. Expand business presence without having to rent an entire building.

Credibility – Sound clear and professional when you pick up the phone and forget about call drops. Possess all the tools of an enterprise communications system at a fraction of the price.

Scalability – Whether eight or eight hundred, scale as your organization grows. Need to open a new office? Not a problem; your system will be up in no time.

Easy Setup / Easy to Use – Getting started is as simple as plugging in a phone, and with UniVoIP's administrative portal customizing settings is a cinch.

Mobility – In your car, or on the go, always have access to your phone system and never miss a call again. Whether it's receiving a voice-mail via email, or having your desk phone twinned with your cell you will always be kept in the loop.

24/7 Support – It's three in the morning and you need help. Don't worry, just give our team a call and we'll get right on it. UniVoIP Support is friendly, knowledgeable and gets the job done.

Disaster Recovery – During a catastrophe phones are more vital than ever. UniVoIP's robust system has full redundancy so your phones will always be online, no matter what

To inquire about CTF Certified Hosted VoIP contact marketing@univoip.com or call **855-UNIVOIP**.



California Teleconnect Fund Categorically Eligible Participant Rules

Effective August 3rd, 2018

- 1.) Schools: The Federal E-rate eligibility criteria for private nonprofits that caps endowments at \$50 million is retained for California Teleconnect Fund School Participants.
- 2.) Community Colleges: The CTF budget cap for community colleges will no longer apply.
- 3.) Libraries: Libraries remain categorically eligible without any change in eligibility requirements.
- 4.) Hospitals and Health Clinics: Critical Access Hospitals should be categorically eligible participants as a subgroup under the “Hospitals and Health Clinics” category. Critical Access Hospitals must individually meet the government owned and operated or nonprofit criteria for CTF recipients
 - “Educational Instruction” is defined as “regular, ongoing, preschool or K-12 academic educational or instructional programs that can also include ESL and language education, literacy, job training, technology instructions, and information on public benefit and social services programs eligibility and access.”
 - Religious organizations providing early childhood or K-12 education are excluded from qualification under the CBO Educational Instruction category and instead should require application by these entities to meet categorical qualification requirements under “Nonprofit, private” schools.
 - Religious organizations that otherwise meet the CBO requirements by providing other qualifying services may apply for California Teleconnect Fund (CTF) participation as a CBO.

Eligibility requirement for CBOs

Beginning August 3, 2018 all new Community Based Organizations (CBO) applicants will be evaluated based on the revised rules and criteria adopted in Decision [\(D\)15.07.007](#) and [D.18.01.006](#).

“Community based organization” is defined as a small, nongovernmental, California nonprofit corporation which itself directly serves individuals and families and which offers services to anyone who needs it without charge or at a minimal fee.

- Revenues less than \$5 million. Large CBOs with small individual local chapters or offices can apply for the local individual organization if that individual organization operates below the \$5 million cap.
- Qualifying services* must be 50% or more of a CBO’s mission

- IRS 501(c)(3) tax exempt letter
- IRS 990 or other financial statements and attestation, if they do not have a Form 990 or if the Form 990 is inadequate
- Provides its community access to the internet (community access means members of the community – not just staff – must be able to use the computers) – except for Health Care/ Health Services or 2-1-1 CBOs;
- Provides services directly to individuals at specific geographic locations;
- A majority of the members of the Board of Directors are members of the community the organization serves;
- Services are provided directly or through some closely related indirect assistance. “Indirect Assistance” means providing assistance on site to those unable to do so because of disability or limited English proficiency;
- Internet access for purely administrative purposes continues to be prohibited;
- Religious organizations must meet all the CBO criteria above and provide qualifying services through a separate legal entity that files a separate federal income tax return;
- 2-1-1 information and referral CBOs will continue to be eligible as approved by Commission resolution;

5.) The following eligibility criteria apply to Health Care/Health Services CBOs in addition to the general CBO eligibility criteria above:

- Have annual revenues of less than \$50 million
- The licensed medical personnel that are required to be on site must provide Healthcare services to patients and not just provide administrative services
- Eligible Healthcare shall include those covered by any Californian medical insurance or government funded medical plan such as Medi-Cal, Medicare, the Department of Veterans Affairs insurance, and/or provides services without charge or at a minimal fee

6.) California Telehealth Network members shall be individually qualified before receiving California Teleconnect Fund discounts.

7.) An initial budget cap will be adopted for the Health Care/Health Services CBO category as a whole and an initial budget cap will be adopted for the California Telehealth Network membership group in particular

*“Qualifying services” include: health care, job training, job placement, 2-1-1 referral and information services, and educational instruction**, or a community technology program providing access to and training in the internet and other technologies.

***“Educational instruction” is “regular, ongoing, pre-school or k-12 academic educational or instructional programs, that can also include, ESL and language education, literacy, job training, technology instruction, and information on public benefit and social services programs eligibility and access.”

General Information for Receiving the CTF Discounts and Application Process

Applicants shall provide all information required on the application and return the completed application to the Communications Division (CD) of the California Public Utilities Commission (CPUC) for review. CTF discounts will not become effective until the application has been reviewed and approved by CD.

Materials to gather before applying

For Non Profit Community-Based Organizations:

- Federal Employment Identification Number (EIN)
- Brochure of the organization
- 501(c)(3) tax-exempt letter that is addressed to the organization
- Most recent IRS Form 990
- List of the names and residential cities of the board of directors, and description of how the board of directors is representative of the community it serves
- A description of the geographic community or neighborhood, community of identity, or community of interest to which services are provided.

For Libraries:

- A copy of the California Teleconnect Fund Certification from the California State Library

For Nonprofit Private Schools:

- Copy of the school's directory cover page
- A copy of the page in the school's directory listing the name of the school the affiliated entity
- A signed letter stating the school's relationship to the entity

For County District Schools

- County-District-School (CDS) Code

For Government Owned and Operated Hospitals and Health Clinics

- Letter stating that this facility is owned, operated, and maintained by government employees
- Copy of the clinic or hospital's directory showing the name and title of the person signing the letter

Application Process

[CTF Application](#) and Instructions (Effective August 3, 2018)

The application review process generally takes 30 to 90 days. After reviewing an application, the CPUC sends the applicant an Approval, Deficiency, or Rejection Notification. These status notifications are delivered via e-mail, as per [Administrative Letter No.19](#). The CPUC also posts [lists of approved applicants](#).

The CPUC will send the applicant an Approval, Deficiency, or Rejection Notification. If you receive an Approval Notification, contact your [CTF participating service provider](#) to arrange the discounted services. Also, give your service provider a copy of your Approval Notification.

Effective Date of Discount

For a newly approved applicant, the discount begins (retroactively) on the date the CPUC received the application, provided the approved applicant contacts its service provider within 30 days of receiving the Approval Notification. The date the CPUC received the application is noted as “Date Filed” on the upper right hand corner of the Approval Notification. If the newly approved applicant contacts its service provider after the 30-day period, the discount begins on the date of contact.

NOTE: If your organization receives other discounts such as the Federal E-rate, the CTF will cover 50% of the remaining balance after the other discount programs are applied.

Re-Certification Guidelines

CBOs (but not other entities) are required to re-certify their eligibility every 3 years.

Adding new services or changing service providers: In both cases, you do not need to re-apply. Simply inform your CTF participating service provider that you want additional CTF-eligible services. Or, inform your new CTF participating service provider that you are approved for and want to receive the CTF discount. Also, give your new service provider a copy of your Approval Notification.

Moving to a new location: You need to send a letter informing the CPUC staff of your (1) application no; (2) existing or former location; (3) new location; (4) CTF-eligible activities offered to the community; and (5) annual revenues.

Adding a new branch: A new application is required for a new branch.

California Teleconnect Fund Contacts

Assistance, general questions presentations and other inquiries:

Karo Serle (Karo.serle@cpuc.ca.gov) and Amy Lau (Amy.lau@cpuc.ca.gov) - Applicant Eligibility Requirements

Community based organizations, government-owned hospitals and health clinics can contact at CTFHelp@cpuc.ca.gov.

Schools, libraries, and community colleges can contact Ligia Serpas at Q53@cpuc.ca.gov or (415) 703-4332

Who to contact to check on application status after the 90-day application period.

Ligia Serpas Q53@cpuc.ca.gov or (415) 703-4332

Resources

Read [Commissioner Peterman's Decision Resolving Phase I and II Issues](#) for the full scope of Rulemaking.

For more information about the implementation discussions and how the new rules came about, visit the [Rulemaking to Conduct a Comprehensive Examination of the California Teleconnect Fund](#)

Read the [California Teleconnect Fund FACT SHEET](#)

Download the California Teleconnect Fund [Administrative Letters](#)