

**Public Service Commission of Wisconsin
Telecommunications Service Provider Annual Questionnaire
FAQ / Instruction Manual**

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Getting Started and Navigation

Cautions

- **System Timeout** – After 20 minutes of inactivity the annual questionnaire system will disconnect from the PSC’s web servers. If this happens the user will lose any unsaved data and they will need to log into the annual questionnaire system again. Save before you go for coffee.
- Do not open more than one annual questionnaire at a time. If a user opens multiple questionnaires in the same browser the system may become confused. Unexpected and unwanted results may occur.
- No more than one user should work on a single annual questionnaire at the same time.
- Check over the questionnaire carefully and remember to create and save a PDF if you need a copy of the filing.

This FAQ uses, in places, general and/or simplified language. That language should not be considered legally binding. For a legal assessment of what revenues are reportable and assessable, see the underlying statutes, administrative code, and the Commission’s various orders in docket 5-GF-104 and elsewhere.

Annual Questionnaire Passwords

The Annual Questionnaire system has a unique password, different from the passwords used by other PSCW systems. If you need to change or reset the AQs password, you will need to use the **forgot/change password** function at the bottom of the annual questionnaire log in page. The reset process will require you to enter a confirmation code that will be sent to **the carrier’s official email address**. Make sure you can get access to that email before you reset the password.

Three unsuccessful attempts to change the password will lock the account for 24 hours. The system will automatically unlock 24 hours after the unsuccessful attempt.

Commission staff cannot reset passwords. It can only be done through the app, and only with the code sent to the provider’s **official email address**. Codes, once sent, are valid for 25 minutes.

This video explains the process for logging into the AQS system, including changing password. [Logging into the WI Telecom Annual Questionnaire System.](#)

Working on the Annual Questionnaire

We have videos explaining each section of the questionnaire on [this YouTube playlist](#).

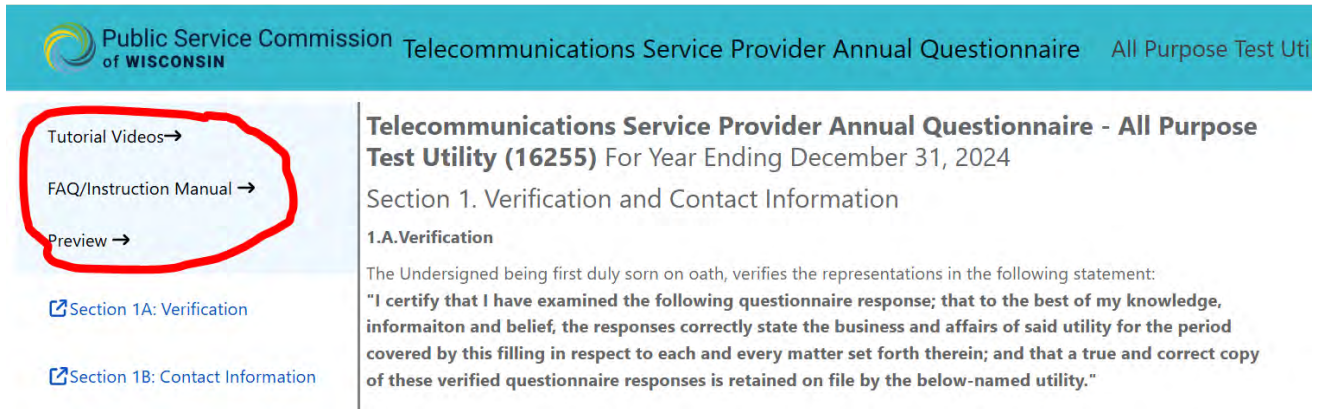
Annual questionnaires do not need to be completed in one session; they may be worked on over several days or weeks. Questionnaires remain active until they are submitted, and when users log into the system for that carrier, the questionnaire will reload with the last saved information.

Once a questionnaire is submitted, the questionnaire is no longer available for editing. If a carrier needs to revise a filed questionnaire, it will need to complete and file a new questionnaire. A more recently filed questionnaire will overwrite the older data in the database.

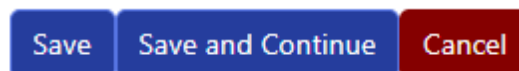
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Navigation Between and Within Schedules

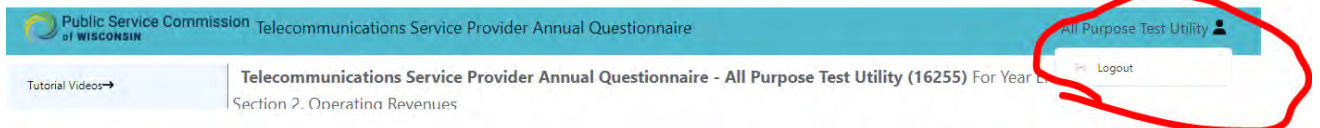
- The navigation bar on the left will allow you to call up resources, switch between pages, and preview the questionnaire.



- The **Tutorial Video** button takes you to a video that explains how to complete and file the questionnaire.
- The **FAQ/Instruction Manual** button takes you to this document.
- The **Preview** button creates a preview of the full questionnaire, including all data you have entered and saved.
- If a page is not relevant to your carrier, the link will be grayed out and not clickable. For example, a wireline-only carrier will not have access to page 2.D. which is used only for reporting wireless revenues.
- The Section # buttons take you to the individual sections.
- Saving your work:** - To save your data, click the “Save” or “Save and Continue” buttons at the bottom of the page. Save your work before you exit or navigate to a new section.



- To log out:** the name of the carrier for which you are entering data appears in the upper right of the screen. Clicking on that name will pop up the option to log out. Doing so will take you to the login page. Remember to save your work before you leave.



Big Questions

Treatment of Broadband Revenues

- Broadband revenues must be reported, but are not assessable.**

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- Wireline providers enter broadband revenues on Line 2.C.8. These revenues are included in the total gross revenues but are part of the amount deducted (shown on line 3.A.4) from these revenues before assessments are calculated.
- Wireless providers report non-voice broadband revenues on line 2.D.10.
- If a provider offers both wireline and wireless services, the provider should report wireline revenues in Section 2.C and wireless revenues in Section 2.D. Do not report the same revenues in both sections.

Treatment of Bundled and Mixed Voice and Broadband Revenues

- **Both the voice and broadband portions of bundled service revenues must be reported, but only the voice portion is assessable.**
- The Commission found, in docket 5-GF-104, that several options for separating the voice and non-voice portions of bundled revenues are appropriate. These are described in the line specific information for lines 2.C.8 and 2.D.1. Options include the 80/20 rule, a 50/50 safe harbor and the “other” option.
- You must explain, briefly, which method you used to separate the voice portion of bundled service in Note for line 8. If the separation uses the method “other,” you must describe the method in sufficient detail that staff may understand and replicate the calculation.
- For wireline providers, the voice portion of bundled service is reported on Line 2.C.8, and the broadband portion on line 2.D.6.
- For wireless providers, the voice portion is reported on line 2.D.1 and the broadband portion on line 2.D.10.

Treatment of USF Reimbursement, including state and federal High Cost and Lifeline

- All state and federal USF payments to all carriers designated as Eligible Telecommunications Carriers must be reported. This includes reimbursements from the following programs:
 - Lifeline & Link-Up
 - High cost support programs such as ACAM and RDOF.
- State and federal reimbursements are reported as follows.
 - Wireline providers report state and federal reimbursements on line 2.C.2
 - Wireless providers report state and federal reimbursements on line 2.D.9.
- More detail can be found in the line specific information for lines 2.C.2 and 2.D.9.

Jurisdictional separations.

- State statutes mandate that only intrastate voice services are assessable for state USF purposes. As a result, any revenues that are assessable for USF must be separated between state and federal jurisdictions.
- Details on how revenues are assessed for USF purposes is in, among other places, the various orders in docket 5-GF-104.
- Revenues allocated to the interstate jurisdiction must also be reported, since many of these interstate revenues are assessable for other (non-USF) purposes.
- Revenue against which assessments are made include intrastate, interstate, and international gross operating revenues with a nexus to Wisconsin operations. Due to a past court case, this includes interstate transmissions that originate *or* terminate in Wisconsin.
 - Standard separations methods are acceptable, including FCC safe-harbors and carrier-specific cost studies.

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Treatment of VoIP Revenues

- Voice over Internet Protocol (VoIP) revenues – both interstate and intrastate - are reported on line 2.C.7.
- VoIP revenues are assessable for USF, Relay and TTP, but not for Remainder purposes.

General Items

Entering Data

- **Report all dollar amounts rounded to the nearest whole dollar.** (Example: report \$130,437.89 as \$130,438 – no decimals, and not in thousands.) This is different than in prior years when revenues were entered in thousands of dollars. Do NOT enter amounts rounded or concatenated to the nearest thousand dollars, or in thousands of dollars.
- All numeric fields must contain a number. Zero is acceptable for all fields.
- Negatives should be entered with the minus sign “-”.
- You may preview the entire questionnaire at any time. Calculated fields (e.g. Gross Revenue, which is the total of all revenues on the schedule) appear in the preview. Calculated field do not appear on the data entry form since those fields are not enterable.
- The preview will include all data that has been entered *and saved*.
- **Repeating for emphasis: Report all dollar amounts as actual dollars, not in thousands.**

Confidentiality

The annual questionnaire program incorporates provisional confidentiality, meaning that the filer can choose to have the system protect all data that is protectable under Wisconsin law. If the program’s provisional confidentiality capability is utilized, the user is not required to complete a PSC Confidentiality Request form nor provide a notarized affidavit.

If a user wishes to utilize the maximum confidentiality allowed by the program, click the “To File Confidentially” box when submitting the annual questionnaire.

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Tutorial Videos →
FAQ/Instruction Manual →
Preview →

Section 1A: Verification
Section 1B: Contact Information
Section 2A: Has WI Revenues?

Telecommunications Service Provider Annual Questionnaire
Purpose Test Utility (16255) For Year Ending December

Email Address

To File Confidentially, click this box

Submit

In general, fiscal information contained in the questionnaire can be filed as confidential and are protected from disclosure under Wisconsin law. The utility name, contact information, and the contents of the notes are not protectable.

Carrier has No Revenues

Companies with no revenues for the reporting year **are still required** to file an annual questionnaire. Clicking the “NO - I certify that at no time during the calendar year did this utility have any Wisconsin revenues associated with any of the following:” button will shortcut most of the application. You will still need to enter contact information and may add any notes (optional) but then you can submit the questionnaire.

Filing the Annual Questionnaire with the PSC

The annual questionnaire must be prepared and submitted via the web program. Do not send a paper copy or PDF of the questionnaire to the PSCW. They will not be accepted.

Take care that all responses are accurate and complete before submitting the questionnaire. Once the questionnaire has been submitted, it cannot be edited. **If subsequent changes are necessary, the user must complete a new questionnaire.** The new questionnaire will overwrite the data from the previous version in the PSCW master database.

If you want or need a copy of the submitted questionnaire, please print out and/or save a pdf copy of the completed questionnaire BEFORE exiting the program.

The due date for the annual questionnaire is April 1st. If that date falls on a weekend, the annual questionnaire is due the following business day.

Utility Name Change

If the utility’s name has been changed from what is shown on the questionnaire, the carrier will need to file a notification of name change using the Commission’s Electronic Regulatory Filing (ERF) system. ([PSC - Electronic Records Filing \(ERF\)](#).) The notification needs to include a cover letter clearly identifying the carrier and providing the old and

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new names. The carrier needs to attach documents from the State of Wisconsin Department of Financial Institutions (DFI) showing that the new name has been registered with DFI. A domestic corporation should upload to ERF a copy of the stamped page from its Articles of Amendment as filed with DFI. A foreign corporation should send a copy of their Amended Certificate of Authority as issued by DFI. These documents can be obtained by:

1. Calling DFI at (608) 261-7577;
2. Contacting DFI on the web at <http://www.wdfi.org>; or
3. By writing to DFI at P.O. Box 7846, Madison, WI 53707-7846.

Types of Assessments and Determination of Assessable Revenues

The Commission has four primary assessments which may affect telecommunications carriers.

- **Remainder Assessment:** authorized by Wis. Stat. § 196.85(2). The remainder assessment collects the amount appropriated by the state under Wis. Stat. § 20.155(1)(g) for the Commission's regulation of public utilities. This is the amount of the agency's costs that are not reimbursed by direct assessment based upon individual docket activity. Cellular and VoIP providers are exempted by statute from remainder assessment.
- **Telephone Relay (Relay) Assessment:** authorized by Wis. Stat. § 196.858. The telephone relay service assessment collects the amount appropriated by the state under Wis. Stat. § 20.505(1)(ir) for the Department of Administration to establish and maintain the statewide telecommunications relay service. Cellular providers are exempt from relay assessment.
- **Telecommunications Trade Practices (TTP) Assessment:** authorized by Wis. Stat. § 196.859. The telecommunications utility trade practices assessment collects the amount appropriated by the state under Wis. Stat. § 20.115(1)(jm) for the Department of Agriculture, Trade and Consumer Protection to administer Wis. Stat. § 100.207.
- **Universal Service Fund (USF) Assessment:** authorized by Wis. Stat. § 196.218(3)(a)1. The Universal Service Fund assessment collects the amount appropriated by the state for the programs and activities set forth in Wis. Stat. § 196.218(5). The assessment includes programs administered by the Commission, in addition to DOA's TEACH and other programs, DPI's support for libraries and Newline for the Blind, and appropriations to the UW System. The PSC USF programs are a small fraction of total USF assessments.

The Commission Staff developed, in consultation with industry experts and concerned parties, a table showing assessable and non-assessable revenues. The table reflects the effect of 2011 Wisconsin Act 22 and the Commission's October 19, 2011, determination in docket 5-GF-104, the Commission's November 18, 2011, determination in dockets 5-GF-104 and 5-GF-209, and the Commission's February 10, 2012, determination in docket 5-GF-104. That table can be found in Appendix A.

Questions about the Questionnaire or Filing Process

Questions relating to the questionnaire, or the annual reporting process, should be directed to Peter Jahn at Peter.Jahn@wisconsin.gov.

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Information Related to Specific Sections of the Questionnaire

Section 1.A: Verification and Contact Information

- This section requires an official of the carrier to attest that the information in the annual questionnaire is complete, truthful and accurate.
- The official can be any employee or representative of the carriers capable of binding the carrier and verifying the accuracy of the data.
- The section asks for the official's name, title and date on which they are e-signing the questionnaire.
- This information cannot be filed confidentially.

Section 1.B: Contact Information

- Section 1.B asks for contact information for the person who can answer questions about the contents of the questionnaire. It also asked for the contact that can answer more general regulatory questions. These can be the same person.
- We require the name, email address and contact phone number for each person.
- This information cannot be filed confidentially.

Section 2.A.: Attestation of Activity in Wisconsin

- If a company has no Wisconsin revenue of **ANY** of the listed types in the calendar year, it should check the appropriate box. If a company certifies that it had no activity / revenues in Wisconsin during the calendar year, the application will skip the portions used for entering revenues. The company still needs to save and submit the questionnaire.
- A report of no activity cannot be filed confidentially.

Section 2.C.: Wireline Operating Revenues, General Notes

- Important: **Report all dollar amounts in whole dollars.** This is a change from prior years, where revenues were reported in thousands of dollars.
- All providers except Commercial Mobile Radio Service (CMRS) providers should report revenues in this section. CMRS service providers should instead use Section 2.D, Wireless revenues.
- If a provider is certified and/or registered as both a wireline and wireless provider, it can enter revenues in both sections, divided as appropriate. Do not report the same revenue in both sections.
- All numeric items are eligible for confidential treatment. The notes for lines 7, 8 and 9 are not confidential.
- Some lines (those assessable for USF) require reporting both intrastate and interstate revenues. For other lines, only total Wisconsin revenues is required.
- Some lines require an explanation of the method used to calculate the allocation.
- All fields must contain a number. Zero is acceptable for all numeric fields.
- Unless otherwise indicated, all information requested in this questionnaire should be taken from the accounts and other records of the carrier.
- All booked Wisconsin revenues of the company should be reported on this schedule. No revenues should be reported on more than one line.

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- The revenues reported in this questionnaire are used to calculate assessments for the Wisconsin Universal Service Fund (USF), Remainder, Telephone Relay service (TRS), and Telecommunications Trade Practices (TTP) assessments. USF assessments are only applied against the intrastate portion of assessable revenues. Revenues reported on specific lines may or may not be subject to any specific assessments. See the line specific notes for details.
- A task force comprised of industry, Commission staff, interested parties, and legal and subject matter expert determined what services were, and were not, subject to assessment. The Commission codified these recommendations in several orders in docket 5-GF-104. (see, for example, [Final Determination Regarding the Assessment of Mixed Voice and Non-Voice Services for the Universal Service Fund \(signed & mld 2/10/12\) - PSC REF#: 159445.](#))

Section 2.C.: Wireline Operating Revenues, Line Specific Information

- **Line C.1: Retail Voice Revenues – including Local and Long Distance and High Capacity Lines used for Voice Service**
 - Revenues should be allocated between intrastate and interstate jurisdictions. This allocation should follow FCC separations rules.
 - VoIP revenues should not be reported on this line. VoIP revenues are reported on line 2.C.7.
 - The Voice portion of mixed or bundled service revenues should not be reported on this line. The voice portion of such revenues are reported on line 2.C.8.
 - Revenue for the following services should be reported on this line:
 - Basic local exchange service (R-1, B-1, etc.)
 - Centrex and comparable services.
 - Conference bridging
 - Custom calling services (e.g. caller ID, call forwarding, call waiting)
 - Early termination or disconnection fees related to retail voice service
 - Extended community calling
 - Extended area service
 - Foreign exchange service
 - High capacity circuits (T-1, DS-1, DS-3, etc.) primarily used to provision retail intrastate telecommunications voice service (e.g., PBX trunks)
 - Installation, service order, activation, and service connection and other non-recurring charges related to retail voice service
 - Long distance service
 - Private branch exchange (PBX) service
 - Phone card (prepaid and debit) sales
 - Teleconferencing services
 - Voice grade channel services (types 2001 through 2008, and 2010)
 - Other voice services, except VoIP. (VoIP service revenue is entered on line 2.C.7.)
 - These revenues are assessable for USF, Remainder and TTP/TRS purposes.
- **Line C.2: State and Federal USF and High Cost Assistance, plus Access and Private Line Revenues**
 - Enter revenues divided between intrastate and interstate jurisdictions.

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- Revenues to be reported in this section include revenues from:
 - Switched and Special Access Services
 - Private Line Services, including Transport provided to ISPs and other carriers
 - Data Transport services, including:
 - Dark fiber and other transport
 - Digital link / digital channel
 - Ethernet
 - Frame relay
 - High capacity circuits (T-1, DS-1, DS-3, etc.) primarily used to provision wholesale, interstate, or data service (e.g., Dedicated Digital Service (DS-1, DS-3, etc.) used for point to point transport of data)
 - Internet Service Provider (ISP) charges associated with the transport of the signal from end users to ISPs via switched or unswitched Internet access
 - End User Common Line Charges
 - **Federal and State USF payments, including High Cost, Lifeline, and Linkup Reimbursement**
 - **Federal disbursements of USF money through USF programs for which ETC designation is required. (including High-Cost programs like ACAM, RDOF and CAF II)**
 - Interconnection between local and toll providers associated with interstate calls.
- These revenues are assessable for Remainder and TTP/TRS purposes, but not for USF.

- **Line C.3: Revenue from State and Federal USF surcharges.**
 - Enter the combined revenues for both jurisdictions from surcharges on retail customer bills for recovery of Federal and State USF costs.
 - If your company does not assess USF surcharges, enter 0.
 - These revenues are assessable for Remainder and TTP/TRS purposes, but not for USF.

- **Line C.4: Revenue from Interconnection, including Reciprocal Compensation, Directory, and Unbundled Network Elements (UNEs)**
 - Includes revenue from co-location, unbundled network elements (UNEs) and other interconnection-specific services.
 - As used here, Directory means revenues from directory advertising, directory assistance, and directory listing options (e.g., non-published, non-listed, and additional listings).
 - These revenues are assessable for Remainder and TTP/TRS purposes, but not for USF.

- **Line C.5: Payphone Revenue**
 - Includes revenue from prison payphone services.
 - These revenues are assessable for USF, Remainder, and TTP/TRS.

- **Line C.6: Retail Broadband Revenues, plus revenues from Cable TV, Video, and Customer Premises Equipment and Wiring Revenue.**
 - Revenues from the following services must be reported here:
 - **Pure broadband and ISP services** provided to end users.

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- **The non-voice portion of bundled service packages.** (Details on how to split voice and non-voice portions of bundled services are provided in the notes for line 2.C.8, below.)
 - Cable TV and dedicated video services
 - Revenue from non-utility services, such as inside wiring installation and maintenance and customer premises equipment.
 - Digital subscriber line and other broadband transport services provide to end users.
 - Internet service provider field service, hosting, hookup, and facilities charges.
 - These revenues are not assessable for USF, Remainder, or TTP/TRS purposes.

- **Line C.7: Interconnected Voice over Internet Protocol (VoIP)**
 - All companies providing VoIP service should use this line, regardless of whether or not such revenues are accounted for as part of Operating Revenues in the provider’s accounting records.
 - Include all revenue from Interconnected VoIP services, whether fixed or nomadic.
 - If the number on this line is greater than zero, you must indicate the jurisdictional allocation method used. These may include.
 - Actual intrastate revenues
 - A provider-specific traffic study approved by the PSCW
 - A provider-specific traffic study approved by the FCC
 - The FCC “Safe Harbor” allocation of 64.9% interstate, 35.1% intrastate.
 - Explain in Note 7 which method was used to make this allocation.
 - These revenues are assessable for USF and TTP/TRS purposes, but not for Remainder.

- **Line C.8: Voice Portion of Mixed and Bundled Voice and Data Services**
 - Mixed or bundled services are packages consisting of both voice and non-voice services provided together for a single price.
 - The voice portion of bundled revenues are assessable for USF, but the remainder is not assessable for any purpose. Revenues allocated to the voice portion of bundled services should be reported on this line. Revenues allocated to non-voice should be reported on line 2.C.6.
 - In docket 5-GF-104, the Commission found that voice and non-voice revenues should be allocated according to the hierarchy listed below.
 1. If the bundle is predominantly (more than 80 percent of communication traffic volume) or solely used for voice, the revenues should be assigned 100 percent to voice. Likewise, if the bundle is predominantly or solely used for non-voice, the revenues should be assigned 100 percent to non-voice. Traffic volume may be calculated or estimated by counting messages, packets, bytes or any other reasonable method.
 2. If the service is basically a “package” or “bundle” of voice and non-voice services, and there is a separate price for each component stated on customer bills, the revenues from the service shall be allocated based on those separately stated prices. If a carrier offers multiple bundles, the carrier can calculate the percentage for the most common bundle and apply that percentage to all bundle revenues. Here’s an example of this calculation.

Customer Bill Reads		
<i>Superduper bundle – our best offer with</i>		<i>\$89.77</i>
• <i>Unlimited Voice service</i>	<i>\$24.99</i>	

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- | | |
|-------------------------|---------|
| • Premier Video service | \$24.99 |
| • 1 Gig Data Service | \$33.79 |
| • Managed Modem Service | \$5.00 |

The voice portion of this bundle is \$24.99/\$89.77, or 27.8%. The assessable portion of total bundled revenue is 27.8% of the total revenue from the bundle.

3. If the service is basically a “package” or “bundle” of voice and non-voice services that are each also offered separately, the revenues from the service shall be allocated so that the entire discount inherent in the package or bundle is allocated entirely to non-voice services. In other words, the USF assessable portion of the revenue from the bundle is equal to the stand-alone price of the voice service divided by the price of the bundle. Here’s an example of this calculation.

Prices of the various options.

Bundled voice, video and data	\$72.99
Stand-alone voice	\$23.99
Stand-alone video	\$19.95
Stand-alone broadband data	\$53.95

The assessable portion of this bundle is the price of the stand-alone voice service divided by the price of the bundle. In this case, that’s \$23.99/\$72.99 or 32.9%.

4. If none of the first three methods applies, the provider can either:
- a. Use a safe harbor allocation percentage of 50% of bundled service revenues are voice revenues and 50% non-voice revenues. Voice service revenues are assessable and should be reported on this line. Non-voice revenues are reported on line 2.C.6.
 - b. Use any other reasonable allocation method other than 1, 2, 3, or 4.a., subject to the following caveats. Any provider choosing to use method 4.b. should be aware that such other allocation method will be evaluated by the Commission on a case-by-case basis. Should an objection, review or enforcement proceeding be initiated, the carrier may be obligated to show that the allocation method used generates a reasonable allocation of bundled revenues. If the carrier cannot show that the method is reasonable, the carrier may be required to refile the questionnaire using a different method.
- Voice revenues reported on this line are assessable for USF, Remainder and TTP/TRS purposes. The non-voice portion of bundled revenues are reported on Line 2.C.6 and are not assessable.

• **Line C.9: Other Nonregulated Revenues Not Already Reported Above**

- Providers should use this line to report revenues not assessable for USF, remainder, relay, nor trade practices assessments, and that are not already reported on another line.
- **Commission staff is not, at this time, aware of any services that should be reported on this line.**
- If the number on this line is greater than zero, you must enter a description of the services involved in the box provided at the bottom of the page.
- These revenues are not assessable for Remainder, TTP/TRS nor USF purposes.

• **Line C.10: Other Revenues Assessable for USF Purposes**

- Providers should use this line to report revenues assessable for USF, remainder, relay, and trade practices assessments, and that are not already reported on another line.

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- Commission staff is not, at this time, aware of any services that should be reported on this line.
- These revenues are assessable for USF, Remainder and TTP/TRS purposes.

- **Line C.11: Other Revenues from Wholesale, Data, Information, or Miscellaneous Services Not Already Reported Above**
 - Items to report on this line include, but are not limited to:
 - 900 number services
 - Billing and collection
 - Detailed billing
 - Inbound interstate and international 800 and collect calls billed to customers in Wisconsin
 - Installation, service order, activation, and service connection charges related to non-voice services
 - Late payment fees and finance charges
 - Non-sufficient funds (NSF) charges
 - Early termination or disconnection fees related to non-voice service
 - Rent
 - Sales to resellers
 - Switched data service
 - Voice grade channel services (types 3002 and 3003)
 - Voice mail services
 - If the number on this line is greater than zero, you need to enter a brief description / list of the services in the box provided at the bottom of the page.
 - These revenues are assessable for Remainder and TTP/TRS purposes, but not for USF.

- **Line 13 Uncollectible Revenue**
 - Enter the amount of uncollectible revenues related to services listed above and which were written off in the relevant calendar year.
 - The amount should be entered as a positive number.

Section 2.D. Wireless Operating Revenues – General Notes

- Important: **Report all dollar amounts in whole dollars.**
- All wireless providers (cellular, CMRS, etc.) should report revenues in this section. Other providers should use Section 2.C. If a provider is both a wireline and wireless provider, it should report the relevant revenues in each section as appropriate. Do not report the same revenues in both sections.
- All entries in this section, except for the notes, are eligible for confidential treatment.
- For some lines (those assessable for USF), a breakdown of intrastate and interstate revenues is required. For other lines, only Total Wisconsin Revenues is required.
- All fields must contain a number. Zero is acceptable for all fields.
- The values to be entered feed forward into Section 3, Assessable Revenues.
- Unless otherwise indicated, all information requested in this questionnaire should be taken from the accounts and other records of the carrier.
- All booked Wisconsin revenues of the company should be reported on this schedule. No revenues should be reported on more than one line.

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Section 2.D. Wireless Revenues – Line Specific Information

- **Line D.1: Mobile Voice Revenues, including the voice portion of bundled services**
 - Revenues to be reported on this line include:
 - Voice service revenue
 - **The voice portion of bundled services.** Options for separating voice and non-voice portions of a bundled services are described below. The non-voice portion of bundled service revenue is reported on line 2.D.10.
 - Excess Minute Charge Revenues
 - Revenue from prepaid calling cards and
 - Extra minutes sold to prepaid Lifeline customers over their standard allowance.
 - **Jurisdictional Allocation:** Revenues reported on this line must be divided between intrastate and interstate. Any allocation method approved by the FCC may be used.
 - **Voice Allocation:** In docket 5-GF-104, the Commission found that voice and non-voice revenues should be allocated according to the hierarchy listed below.
 1. If the bundle is predominantly (more than 80 percent of communication traffic volume) or solely used for voice, the revenues should be assigned 100 percent to voice. Likewise, if the bundle is predominantly or solely used for non-voice, the revenues should be assigned 100 percent to non-voice. Traffic volume may be calculated or estimated by counting messages, packets, bytes or any other reasonable method.
 2. If the service is basically a “package” or “bundle” of voice and non-voice services, and there is a separate price for each component stated on customer bills, the revenues from the service shall be allocated based on those separately stated prices. If a carrier offers multiple bundles, the carrier can calculate the percentage for the most common bundle and apply that percentage to all bundle revenues. Here’s an example of this calculation.

Customer Bill Reads		
<i>Superduper bundle – our best offer with</i>		<i>\$89.77</i>
• <i>Unlimited Voice service</i>	<i>\$24.99</i>	
• <i>Premier Video service</i>	<i>\$24.99</i>	
• <i>1 Gig Data Service</i>	<i>\$33.79</i>	
The voice portion of this bundle is \$24.99/\$89.77, or 27.8%. The assessable (voice) portion of total bundled revenue is 27.8% of the total revenue from the bundle.		

3. If the service is basically a “package” or “bundle” of voice and non-voice services that are each also offered separately, the revenues from the service shall be allocated so that the entire discount inherent in the package or bundle is allocated entirely to non-voice services. In other words, the USF assessable portion of the revenue from the bundle is equal to the stand-alone price of the voice service divided by the price of the bundle. Here’s an example of this calculation.

Prices of the various options.		
Bundled voice, video and data		\$72.99
Stand-alone voice	\$23.99	
Stand-alone video	\$19.95	
Stand-alone broadband data	\$53.95	

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The assessable portion of this bundle is the price of the stand-alone voice service divided by the price of the bundle. In this case, that's \$23.99/\$72.99 or 32.9%.

4. If none of the first three methods applies, the provider can either:
 - c. Use a safe harbor allocation percentage of 50% of bundled service revenues are considered voice, and 50% non-voice. Only voice service revenues are assessable.
 - d. Use any other reasonable allocation method other than 1, 2, 3, or 4.a., subject to the following caveats. Any provider choosing to use method 4.b. should be aware that such other allocation method will be evaluated by the Commission on a case-by-case basis. Should an objection, review or enforcement proceeding be initiated, the carrier may be obligated to show that the allocation method used generates a reasonable allocation of bundled revenues. If the carrier cannot show that the method is reasonable, the carrier may be required to refile the questionnaire using a different method.
- These revenues are assessable for USF, Reminder, and TTP/TRS purposes.
 - **Line D.2: Voice Service Roaming (Charged to End Users) Revenues**
 - If your carrier does not charge customers for roaming, enter zero.
 - These revenues are assessable for USF, Reminder and TTP/TRS purposes.
 - **Line D.3: Long Distance Revenues**
 - If your carrier does not charge a different rate for long distance calls, enter zero.
 - These revenues are assessable for USF, Reminder and TTP/TRS purposes.
 - **Line D.4: Directory Assistance Revenues**
 - If your carrier does not provide or charge for directory assistance, enter zero.
 - These revenues are assessable for Reminder and TTP/TRS purposes, but not for USF.
 - **Line D.5: Activation and Early Termination Charge Revenues Related to Retail Voice Services**
 - If your carrier does not assess these charges, enter zero.
 - These revenues are assessable for USF, Remainder and TTP/TRS purposes.
 - **Line D. 6: Wholesale Voice Service Roaming Revenues, Including Revenues from Sales to Affiliated Legal Entities**
 - If your carrier does not assess roaming charges, enter zero.
 - These revenues are assessable for Reminder and TTP/TRS purposes, but not for USF.
 - **Line D.7: Other Wholesale Voice Service Revenues**
 - Enter wholesale revenues here. If none, enter zero.
 - These revenues are assessable for Reminder and TTP/TRS purposes, but not for USF.
 - **Line D.8: Revenue from Retail Voice Service Sales to Affiliates**
 - Enter revenues from sales of voice services to affiliates here. If none, enter zero.
 - These revenues are assessable for Reminder and TTP/TRS purposes, but not for USF.

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- **Line D.9: Assessable Services plus USF Disbursements, including High Cost and Lifeline:**
 - Revenues to be included on this line include:
 - State and Federal Lifeline and Link-Up Reimbursement
 - Federal disbursement of USF money through USF programs for which ETC designation is required. (including High-Cost programs like ACAM, RDOF and CAF II)
 - State and Federal USF Surcharges Assessed to Customers
 - Text and Picture Messaging services
 - Paging Services
 - High Costs Assistance from the Federal USF
 - Reciprocal Compensation (Origination/Termination Assistance) Revenues
 - Voice Mail Revenues
 - Non-sufficient Funds (NSF) Charges
 - These revenues are assessable for Remainder and TTP/TRS purposes, but not for USF.

- **Line D.10: Mobile Broadband, Equipment, and Application Revenues:**
 - Revenues from the following must be reported on this line.
 - **Mobile Broadband services**
 - The non-voice portions of bundled voice / other services
 - Mobile Internet, Mobile Web, and Data services
 - Application Sales
 - Handset and Other Equipment Sales
 - Sales of Ring Tones, Downloaded Music and similar Media
 - Insurance Services
 - Roadside Assistance services
 - All items are eligible for confidential treatment.
 - These revenues must be reported, but are **not** assessable for USF, Remainder, nor TTP/TRS purposes.

- **Line D.11: Other Revenues Assessable for USF Purposes and not included above.**
 - Use this line to report any revenue items that are subject to USF and trade practices assessments, and that are not reported elsewhere.
 - **Commission staff is not aware, at this time, of any services for which revenues which should be reported on this line.**
 - These revenues are assessable for USF, Remainder and TTP/TRS purposes.

- **Line D.12: Other Revenues not Assessable for USF Purposes and not included above.**
 - Revenues to be reported on this line include:
 - Late payment or finance charge revenue
 - Enter any additional revenue items that are not subject to USF assessment, but are subject to other types of assessment, and that are not reported elsewhere on this line.
 - These revenues are assessable for Remainder and TTP/TRS purposes, but not for USF.

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Section 3.A.: Calculation of Assessable Revenues for Remainder, Telephone Relay, and Telecommunications Trade Practices Assessment Purposes – General Notes

- All items are eligible for confidential treatment.
- Many fields in this section of the questionnaire are pulled from the Operating Revenues schedules or are calculated. These fields appear on the preview and final versions of the questionnaire but are non-enterable. They do not appear on the data entry screens.
- All enterable cells must contain a number. Zero is acceptable.
- The entries on the data collection page cover uncollectibles, plus a line to enter other revenues not addressed above.
- Staff is not aware of any revenues which would typically be entered in the “other revenues” line.
- Assessable revenues for remainder and telephone relay assessment purposes are based on intrastate, interstate, and international gross operating revenues with a nexus to Wisconsin operations. Please note that this calculation of assessable revenues is not synonymous with and is more extensive than the typical definition of intrastate (i.e., calls originating and terminating in Wisconsin).
- The Gross Wisconsin Operating Revenues shown on line 3.A1 is before consideration of uncollectible revenues. Uncollectibles are reported on later lines and are subtracted from gross revenues later in the schedule.
- Wireless revenues are subject to the Telecommunications Trade Practices assessment, but not Remainder or Telecommunications Relay assessments.
- Additional, detailed information regarding assessments, including a list of what revenues are assessable and are not assessable, appears as Appendix A, below.

Section 3.A.: Calculation of Assessable Revenues for Remainder, Telephone Relay, and Telecommunications Trade Practices Assessment Purposes – Line Specific Information

- All items are eligible for confidential treatment.
- **Line 3.A.2: Plus: Collections related to assessable revenues written off in prior CYs but collected during the relevant CY**
 - Use this line to report any revenues from accounts that had been declared as uncollectible in prior years, but were collected during the calendar year in question for this AQ. (For example, if completing the AQ in 2025 which reports revenues from CY 2024, any uncollectibles which had been written off in CY 2022 but then collected during CY 2024 would be entered here.)
 - Include only revenues related to assessable services.
 - These revenues are added to gross operating revenues for the year in question.
- **Line 3.A.3: Uncollectibles written off during the relevant CY.**
 - Use this line to report the uncollectibles accrued during the CY at issue.
 - This includes all uncollectible telecommunications-related charges.
 - Do not enter this as a negative number.
 - The uncollectibles related to assessable services reduce the revenues used to calculate assessments for Remainder, Relay and TTP/TRS purposes.

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- **Line 3.A.5: The portion of the uncollectibles reported on line 3.A.3 that related to non-assessable revenue streams.**
 - Use this line to report the portion of the collectibles reported on line 3.A.3 that are not associated with assessable services.
 - Non-assessable services include any revenue items that are not subject to one or more assessments. Uncollectibles related to broadband services and the non-voice portion of bundled service are reported on this line.
 - Do not enter a negative number.
 - These uncollectibles entered on this line reduce the offset from revenues in line 3.A.3.
- **Line 3.A.6: Other revenue offsets not addressed above.**
 - Use this line to report any revenue offsets or items that are subject to USF and trade practices assessments, and that were not reported in prior tables.
 - Losses should be entered as negative numbers.
 - **Commission staff is not aware, at this time, of any services for which revenues which should be reported on this line.**
 - If you enter revenues on this line, you will need to explain what services or factors resulted in the entry in the Note for Line 6.

Section 3.B.: Calculation of Assessable Revenues for Universal Service Fund Assessment

Purposes - General Information

- According to Wis. Stat. § 196.218, assessable revenues for Universal Service Fund purposes includes gross operating revenues from the provision of broadcast services and from intrastate voice telecommunications service in this state. This calculation of assessable revenues uses the typical definition of intrastate (i.e., calls both originating and terminating in Wisconsin).
- The Commission last addressed the assessment of revenues for USF purposes in docket 5-GF-104. Copies of the various orders and other relevant documents can be found in [PSC - Electronic Records Filing \(ERF\)](#) under that docket number.
- Additional, detailed information regarding assessments, including a list of what revenues are assessable and not assessable, is shown in Appendix A to this document, below. The information in that Appendix is derived from the Commission's determinations in docket 5-GF-104, specifically the order dated February 10, 2012. ([PSC REF#: 159445.](#))
- Almost all of the contents of Section 3.B are pulled from other schedules. The only line which is enterable is the "other revenue" line.
- All numeric entries are eligible for confidential treatment. Notes are not.
- All enterable cells must contain a number. Zero is acceptable.
- Total Assessable Revenues for Universal Service Fund Assessment Purposes cannot be negative.

Section 3.B.: Calculation of Assessable Revenues for Universal Service Fund Assessment

Purposes – Line Specific Information

- The only line on which data can be entered is Line 3.B.11, titled "Other USF Assessable Revenues."
- Use this only to enter USF-assessable revenues which have not been entered above.
- **Staff is not, at this time, aware of any revenues which would typically be entered on this line.**

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- If you have no such revenues, enter zero.
- If you enter non-zero revenues on this line, explain in Note 11.

Section 4: Notes

- This section is divided into three sections.
 - General notes on the AQS.
 - Explanation of significant change in assessable remainder revenues.
 - Explanation of significant change in assessable USF revenues.
- If you wish to explain anything in the AQ, or wish to comment, enter that information in the Note in Sec. 4.
- Total note size is limited to 2,000 characters.
- Notes are not eligible for confidential treatment
- If your carrier's revenues have changed by more than 20% and \$20,000 from the previous calendar year, you will be required to provide an explanation. This box only appears if you have entered revenues that vary that much from the prior year's revenues. Most carriers will not see this box.
- The explanation need not be lengthy. If the company had significant growth due to new customers the note could read "more customers." Similarly, if a major customer was lost, or a significant portion of the customer base was bought or sold, explain that.
- If the request for explanation triggers, and the provider does not believe they had a significant change in revenues year over year, make sure that revenues were entered correctly.
- If the revenues decreased box appears, but you do not believe that your carrier's revenues have changed that much, please check that you have entered revenues in actual dollars, not thousands of dollars.

Submitting the Annual Questionnaire:

- This section is divided into three sections: validation, review and submission.
- To begin the submission process, click the "Run Edit Checks, Review and Submit" button on the left side navigation menu.
- The validation section shows what errors must be corrected before the questionnaire can be submitted. If errors need to be corrected, you will see this screen:

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Public Service Commission of WISCONSIN Telecommunications Service Provider Annual Questionnaire - All Purpose Test Utility (16255) For Year Ending December 31, 2024

All validation errors must be address before you are able to review and submit

Validation Errors

Export to Excel

Section Name	Validation Message
Section 2C	All Revenue Fields in section 2C must be filled out. 0 is an acceptable response for otherwise empty fields
Section 3A	Line 6 note is required

Navigation: 1

- You can correct the errors by going to the named section and correcting the errors. In this case, I left one cell blank in Sec 2.C and left a note blank in Sec. 3.A to create the errors shown.
- Once the errors are corrected, clicking on the “Run Edit Checks, Review and Submit” button you will take you to this screen:

Public Service Commission of WISCONSIN Telecommunications Service Provider Annual Questionnaire - All Purpose Test Utility (16255) For Year Ending December 31, 2023

No Validation Errors Found: You May Review And Submit

Review

- Clicking Review will generate the questionnaire in final format, including all the calculated fields. You can review the questionnaire. If you find something wrong, you can go back to the affected section and make changes. When you are satisfied with the questionnaire, you can click the submit button. Before that, however, you may want to create a PDF copy of the questionnaire. The create PDF button appears at the top of the review screen.
- At the bottom of the preview screen you will find a “**Finalize and Submit**” button. Clicking that button will take you to this screen.

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Public Service Commission of WISCONSIN Telecommunications Service Provider Annual Questionnaire All Purpose Test Utility

Tutorial Videos →
FAQ/Instruction Manual →
Preview →
Section 1A: Verification
Section 1B: Contact Information
Section 2A: Has WI Revenues?

Telecommunications Service Provider Annual Questionnaire - All Purpose Test Utility (16255) For Year Ending December 31, 2024

Email Address

To File Confidentially, click this box

Submit

- The questionnaire asks for your email address – the address we can contact if there is a problem with submitting the questionnaire.
- The File Confidentially box files the entire questionnaire, to the extent possible, confidentially. Filing the questionnaire this way does not require the affidavit or other parts of the normal confidentiality filing process.
- If you file confidentially, staff will not be able to provide you with a copy of your questionnaire without a signed release, so create a PDF before you leave the program if you need one.
- **Clicking Submit will upload the data in the questionnaire to the Commission’s data base. It will also clear the data entry fields.** Once submitted, if you need to refile, you will need to reenter the data.

Questions about the Questionnaire or Filing Process

Questions relating to the questionnaire, or the annual reporting process, should be directed to Peter Jahn at Peter.Jahn@wisconsin.gov.

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Appendix A

Accessibility of Specific Voice, non-Voice, and Mixed Services

The following table shows whether specific types of revenues are subject to assessment. This listing is based on interpretations by the Commission staff, made in consultation with industry experts and concerned parties. The table reflects the effect of 2011 Wisconsin Act 22 and the Commission's October 19, 2011, determination in docket 5-GF-104, the Commission's November 18, 2011, determination in dockets 5-GF-104 and 5-GF-209, and the Commission's February 10, 2012 determination in docket 5-GF-104.

Revenue Type	Assessable for USF? ¹	Assessable for Remainder, Relay, and Trade Practices (TTP)? ²
900 number services, regardless of the technology over which the service is delivered.	No	Yes
Application downloads	No	No
Billing and collection	No	Yes
Cable television service (per Wis. Stat. § 196.01(9m))	No	No
Caller ID	Yes	Yes
Call forwarding	Yes	Yes
Call waiting	Yes	Yes
Centrex	Yes	Yes
Channel services: <ul style="list-style-type: none"> • Types 2001 through 2006 and 2010 • Types 2007 and 2008 • Types 3002 & 3003 • Other types 	Yes Yes No Partial ⁴	Yes Yes Yes Yes
Conference bridging	Yes	Yes
Customer premises equipment, handset, and other equipment (sale, lease, or maintenance)	No	No
Customer premises wiring, including inside wire maintenance	No	No
Dark fiber service	No	Yes
Detailed billing services	No	Yes
Digital link / digital channel	No	Yes
Digital Subscriber Line (DSL)-based and other broadband Internet access service revenues ³	No	No
Directory advertising	No	Yes
Directory assistance	No	Yes
Directory listing options (e.g., Non-published / Non-listed / Additional)	No	Yes
Downloaded music and media	No	No
Digital Transport Service – Enhanced (DTS-E) - Modules 1 and 2	Yes	Yes
Early termination or disconnection fees: <ul style="list-style-type: none"> • related to retail voice services • related to wholesale,⁵ data or information services 	Yes No	Yes Yes

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Revenue Type	Assessable for USF? ¹	Assessable for Remainder, Relay, and Trade Practices (TTP)? ²
Eligible Telecommunications Carrier (ETC) cost recovery (receipts from all Federal USF funds)	No	Yes
Ethernet	No	Yes
Federal subscriber line charge	No	Yes
Finance charges	No	Yes
Fixed and nomadic interconnected Voice over Internet Protocol (VoIP) service	Yes	Assessable for Relay and TTP assessments, but not Remainder assessment
Foreign exchange	Yes	Yes
Frame relay	No	Yes
High capacity circuits (T-1, DS-1, DS-3, etc.) primarily used to provision: <ul style="list-style-type: none"> • retail intrastate telecommunications voice service (e.g., Digital Trunk Service using a DS-1 to provision service to a PBX) • wholesale⁵, interstate, or data service (e.g., Dedicated Digital Service (DS-1, DS-3, etc.) used for point to point transport of data) 	Yes No	Yes Yes
Inbound interstate and international 800 and collect calls billed to customers in Wisconsin	No	Yes
Installation, service order, activation, and service connection charges related to: <ul style="list-style-type: none"> • Retail voice service • Wholesale⁵, data, or information service 	Yes No	Yes Yes
Insurance	No	No
Integrated Services Digital Network (ISDN) - Primary Rate Interface (PRI) and Basic Rate Interface (BRI)	Partial ⁴	Yes
Late payment fee	No	Yes
Lifeline and Link-Up revenues for reimbursements received from the state USF	No	Yes
Long distance revenue	Yes	Yes
Mobile web	No	No
Non-sufficient funds (NSF) charge	No	Yes
Other mixed voice/data/information service offerings	Partial ⁴	Yes
Paging fees	No	Yes
Payphone revenue	Yes	Yes
Phone card (prepaid and debit) sales: <ul style="list-style-type: none"> • where the prepaid phone card company provides the underlying phone number associated with the phone card • where the company not providing the underlying phone number also provides telecommunications service at retail (e.g., a telecommunications reseller) • not otherwise noted above⁵ 	Yes Yes Yes	Yes Yes No
Picture messaging	No	Yes
Private branch exchange (PBX)	Yes	Yes
Reseller revenue (revenues from sales to non-affiliated companies that resell service)	No	Yes

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Revenue Type	Assessable for USF? ¹	Assessable for Remainder, Relay, and Trade Practices (TTP)? ²
Retail voice service sales to affiliated companies	Yes	Yes
Revenue from Internet Service Providers (ISPs) associated with transport of the signal from end users to ISPs via switched or unswitched Internet access ³	No	Yes
Ring tones	No	No
Roadside assistance	No	No
Roaming: <ul style="list-style-type: none"> • Outroamer revenue (i.e., wholesale “roaming” wireless revenues derived from customers of another carrier roaming on the reporting company’s network)⁵ • Voice service roaming charged to end users 	No Yes	Yes Yes
Switched access charge revenue	No	Yes
Switched data service	No	Yes
Special access (a/k/a dedicated access) charge revenue	No	Yes
Surcharges to recover costs of state and federal USF assessments	No	Yes
Teleconferencing revenues	Yes	Yes
Text messaging	No	Yes
Voice mail service	No	Yes
Voice private line	Yes	Yes
Unbundled network elements (UNEs), reciprocal compensation and other interconnection revenues	No	Yes
Video distance learning revenues	Partial ⁴	Yes
Voice service sales to: <ul style="list-style-type: none"> • Retail customers • Wholesale customers, including wholesale voice sales to affiliated legal entities⁵ 	Yes No	Yes Yes

1. Revenues from data and information services are exempt from USF assessment. The interstate and international portions of telecommunications revenues are also exempt from USF assessment. All revenues listed in this footnote are assessable for Remainder, Telecommunications Relay, and Telecommunications Trade Practices assessments.
2. Assessable revenue for these assessments is based on intrastate, interstate, and international gross operating revenues with a nexus to Wisconsin operations. Wireless revenues are subject to the Telecommunications Trade Practices assessment, but not Remainder or Telecommunications Relay assessments.
3. These are federally regulated information (i.e., Internet Access) services.
4. These services contain a mixture of voice and non-voice. For these services, providers should allocate revenues between USF assessable (voice) and non-assessable (non-voice) as described above.
5. Assessable retail revenue shall be imputed in instances where a certificated (federal or state, wireline or wireless) provider

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obtains 90 percent or more of its gross intrastate Wisconsin operating telecommunications revenues in a calendar year from sales to non-telecommunications provider merchants through which resale to ultimate end-users is intended. In such instances, the USF assessment liability of such a provider shall be based on calculating a statewide average ratio of retail to gross intrastate telecommunications revenues across all providers, and then applying that percent to the “wholesale-only” telecommunications service provider’s gross intrastate operating revenues.

6. Includes revenue from dial-up Internet access service and revenues associated with the line between the switch and the modem bank.