

**INCARCERATED
COMMUNICATIONS**

**ANNUAL REPORTING
CERTIFICATION
FORMS (FCC FORMS**



**PEOPLE'S
SERVICES**

**AND ANNUAL
2301(a) and 2301(b))**

WC Docket Nos. 23-62, 12-375

INSTRUCTIONS

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I. OVERVIEW

In the *2015 ICS Order*, the Federal Communications Commission (Commission or FCC) charged the Wireline Competition Bureau (Bureau or WCB) with implementing reporting requirements designed to help the Commission monitor the rates, fees, and practices of providers of calling services to Incarcerated People (Inmate Calling Services or ICS).¹ Specifically, the Commission directed the Bureau to develop an Annual Report that each ICS Provider must file regarding its Inmate Calling Services operations during the preceding calendar year. The Commission also directed the Bureau to develop related instructions and a template to gather this information, and required each ICS Provider to file an annual certification declaring its compliance with the Commission's Inmate Calling Services rules during the preceding calendar year.² These annual reporting and annual certification requirements are designed to help ensure transparency in ICS rates, fees, and practices, and to ensure ICS Providers' compliance with the Commission's rules.

Subsequent developments now require additional changes to the instructions, reporting templates, and certification form. In the *2022 ICS Order*, the Commission adopted requirements to improve access to communications services for Incarcerated People with communication disabilities and expanded the scope of the Annual Reports to reflect those new requirements.³ The Commission delegated authority to WCB and the Consumer and Governmental Affairs Bureau (collectively, the Bureaus) to implement the expanded reporting obligations and to develop a reporting form that would most efficiently and effectively elicit the required information.⁴

On January 5, 2023, the President signed into law the Martha Wright-Reed Just and Reasonable Communications Act of 2022, expanding and clarifying the Commission's statutory authority over communications between Incarcerated People and the non-incarcerated, to include "any audio or video communications service used by inmates . . . regardless of technology used,"⁵ and to extend the Commission's authority to intrastate as well as interstate and international communications services used by Incarcerated People.⁶

In the *2024 IPCS Order*, the Commission revised its rules, and modified the scope and content of the Annual Reports, to reflect this increased authority.⁷ In light of this expanded jurisdiction, the

¹ *Rates for Interstate Inmate Calling Services*, WC Docket No. 12-375, Second Report and Order and Third Further Notice of Proposed Rulemaking, 30 FCC Rcd 12763, 12891-92, paras. 267-68 (2015) (*2015 ICS Order*); see 47 CFR § 64.6060.

² *2015 ICS Order* at 12891-93, paras. 267-68, 273.

³ See *Rates for Interstate Inmate Calling Services*, WC Docket No. 12-375, Fourth Report and Order and Sixth Further Notice of Proposed Rulemaking, 37 FCC Rcd 11900 (2022) (*2022 ICS Order*); 47 CFR § 64.6040(b) (adopting expanded access requirements for incarcerated persons with communication disabilities); see also *Wireline Competition Bureau and Consumer and Governmental Affairs Bureau Seek Comment on Revisions to Providers' Annual Reporting and Certification Requirements*, WC Docket Nos. 23-62, 12-375, Public Notice, DA 23-656, at 2-3 (WCB/CGB Aug. 3, 2023) (summarizing the relevant reforms adopted in the *2022 ICS Order*).

⁴ *2022 ICS Order*, 37 FCC Rcd at 11924, para. 52.

⁵ Martha Wright-Reed Act § 2(a)(2), (b).

⁶ *Id.* § 2(c); see 47 U.S.C. § 152(b).

⁷ See *Incarcerated People's Communications Services; Implementation of the Martha Wright-Reed Act; Rates for Interstate Inmate Calling Services*, WC Docket Nos. 23-62, 12-375, Report and Order, Order on Reconsideration, Clarification and Waiver, and Further Notice of Proposed Rulemaking, FCC 24-75 at 294-98, paras. 565-572 (July 22, 2024) (*2024 IPCS Order*); see also *Wireline Competition Bureau and Consumer and Governmental Affairs Bureau Seek Additional Comment on Revisions to IPCS Providers' Annual Reporting and Certification Requirements*, WC Docket Nos. 23-62, 12-375, Public Notice, DA 24-918, at 1-2 (WCB/CGB Sept. 11, 2024).

Commission adopted the terms “Incarcerated People’s Communications Services” or “IPCS,” in place of “ICS,” to refer to the full scope of services and providers subject to its jurisdiction.⁸ In the *2024 IPCS Order*, the Commission also reaffirmed and updated its prior delegation of authority to the Bureaus to revise the instructions and reporting templates for the Annual Reports.⁹ These Instructions and the accompanying templates and Annual Certification Form are designed to implement the Commission’s directives.¹⁰

II. GENERAL INSTRUCTIONS AND FILING REQUIREMENTS

A. Who Must File

Each IPCS Provider must submit a complete and accurate Annual Reporting Form (FCC Form 2301(a)) and Annual Certification Form (FCC Form 2301(b)) (collectively, FCC Form 2301) annually.¹¹

Each group of affiliated Providers shall respond as a single entity, regardless of the number of separately incorporated companies, subsidiaries, or other entities within that group that provide IPCS.

An entity is classified as a Provider if it provides IPCS to people incarcerated in a Prison or Jail, as defined in Part III of these Instructions. When two or more entities work together to provide IPCS to a Facility, each qualifies as a Provider that is required to file. We refer to the Provider that has the contractual or other arrangement with the Contracting Authority as the Contractor, and the Provider without that arrangement as the Subcontractor. Thus, Subcontractors are classified as Providers if they partner with or serve a Contractor and perform functions related to the provision of IPCS, including completing communications that meet the definition of IPCS, billing Consumers for those communications, or retaining revenue from those communications. Subcontractors are therefore not exempted from the definition of a Provider simply because they lack a direct contractual relationship with a correctional authority. Where a Subcontractor provides such communications, but the Provider that holds the contract with the correctional authority bills Consumers for those communications and then pays the Subcontractor, that Subcontractor may also meet the definition of a Provider. In contrast, an entity that provides billing and collection for IPCS provided by a separate entity and remits those revenues to a Provider may not, without more, meet the definition of a Provider.

Providers (including all Contractors and Subcontractors, to the extent that their activities otherwise include some aspect of the provision of IPCS) must complete and file all sections of FCC Form 2301 unless otherwise indicated.

Throughout these Instructions, the terms “you” and “your” refer to any entities that must submit the FCC Form 2301. Part III, below, defines other terms used in these Instructions and in the Annual Reporting and Annual Certification Forms.

(summarizing the relevant reforms adopted in the *2024 IPCS Order*).

⁸ *2024 IPCS Order* at 292-94, paras. 557-58; Appx. A, at 326-44; 47 CFR pt. 64.

⁹ *2024 IPCS Order* at 299-300, para. 572.

¹⁰ These instructions and the associated templates and Annual Certification Form consolidate and supplant the instructions and template and annual certification form for earlier iterations of the ICS annual reporting and certification requirements. As discussed below, the template consists of a Word document and Excel spreadsheets. For simplicity, we refer to these respective portions of the template as the Word template and the Excel template.

¹¹ 47 CFR § 64.6060.

You may contact the Commission staff at IPCSannualreports@fcc.gov if you have questions regarding whether your Company must file an Annual Report and Certification or the specific requirements for those filings.

B. What to File

You must fully and completely respond to each request for information in these Instructions using the Word and Excel templates and Annual Certification Form. Links to the relevant templates and form are provided in the Appendices. Once the Office of Management and Budget (OMB) has completed any review required by the Paperwork Reduction Act (PRA), the final templates and form will be available at <https://www.fcc.gov/general/ipcs-data-collections>. You must submit each template in a machine-readable and manipulatable format using the final template and form.

1. Annual Reporting Form

Your Annual Reporting Form shall consist of: (1) a Word document for narrative responses (see Appendix A); and (2) an Excel spreadsheet for data and other responses (see Appendix B).

As a general matter, these Instructions direct you to enter your responses to requests for certain data and information at specific places in these templates. Provide your narrative responses in the Word template (see Appendix A). You must also use the Word template to provide any additional information needed to ensure that your response is full and complete, and to identify and explain any caveats associated with your response.

Unless otherwise stated, provide your responses for the Annual Reporting Form using the Excel template (see Appendix B). The Excel template has blank cells in which data are to be reported (unless there is an instruction not to enter data in the blank cell). Cells with zeros already present will be automatically populated with the Contract Identifiers and Facility Identifiers once they are entered in Tab B; those cells should not be manually populated. As instructed for specific worksheets, you may add additional rows or columns, following the same format as existing rows or columns, as necessary to complete your responses.

2. Annual Certification Form

You must complete the Annual Certification Form (see Appendix C) regarding the truthfulness, accuracy, and completeness of the Provider's Annual Reporting Form and the Provider's compliance with the Commission's rules.

Submissions will be rejected and returned for correction and resubmission if made without a completed Annual Certification Form signed by an authorized officer of the Provider who, based on information and belief formed after reasonable inquiry, certifies that the statements and information contained in the Report are truthful, accurate, and complete.

C. Filing Deadline and Submission

The Commission's rules require that the Annual Reporting and Annual Certification Forms for the preceding calendar year generally must be submitted by April 1 of each year. As provided in the order adopting these instructions, the Annual Reporting and Annual Certification Forms for the 2024 Reporting Period must be submitted by June 2, 2025.

You must submit public versions of your Annual Reporting and Annual Certification Forms by filing the completed forms electronically through the Commission's Electronic Comment Filing System (ECFS), by accessing the ECFS at <https://www.fcc.gov/ecfs/>.

You may file any information that you believe should be afforded confidential treatment pursuant to the guidance and limitations in the *Protective Order* in these proceedings and by adhering to the standard set forth in section 0.459(b) of the Commission’s rules, the *ICS Annual Report Transparency Order*, and other applicable precedent.¹² As the Bureau explained with regard to the 2019 Annual Reports, information regarding “facility names, [IPCS] rates, [and] the amounts of ancillary service charges” is not entitled to confidential treatment, given the “strong public interest in transparency surrounding rates, charges, terms, and fees for [IPCS].”¹³ Similarly, information on a Facility’s Average Daily Population is not protected from public disclosure.¹⁴ Absent a compelling showing to the contrary, the Bureau’s determinations continue to be applicable to present and future Annual Report filings.

Confidential versions of the reports must be submitted to the Secretary’s office using the Word and Excel templates, and in a machine-readable and manipulatable format, along with the Annual Certification Form. You must also provide courtesy copies of the confidential filing to the Bureau via e-mail to IPCSannualreports@fcc.gov.

D. Compliance

We caution Providers that they must proceed in good faith and with absolute candor in preparing and filing their Annual Reporting and Annual Certification Forms.¹⁵ Any failure to timely file an accurate, complete, and truthful response to this data collection may subject the Provider to sanctions, including, but not limited to, monetary forfeitures.¹⁶ Persons willfully making false statements in an Annual Reporting Form or Annual Certification Form can be punished by fine or forfeiture, under the Communications Act of 1934, as amended, 47 U.S.C. §§ 502, 503(b), or by fine or imprisonment under Title 18 of the United States Code, 18 U.S.C. § 1001.

III. DEFINITIONS

The following definitions are for use with these Instructions and are intended solely to provide guidance to Providers in preparing their IPCS annual report submissions. All capitalized terms used in these Instructions are defined terms with the meaning assigned to them in this section.

Affiliate means (a) an entity that directly or indirectly owns or controls ten or more percent of another company, partnership, or other legal entity, (b) two or more entities that have interlocking directorates or shareholdings, or (d) two or more entities that share employees, equipment, and/or facilities.

¹² *Incarcerated People’s Communications Services; Implementation of the Martha Wright-Reed Act; Rates for Inmate Calling Services*, WC Docket Nos. 23-62 and 12-375, Protective Order, DA 23-298 (WCB Apr. 5, 2023), <https://www.fcc.gov/document/wireline-competition-bureau-adopts-ipcs-protective-order> (*Protective Order*); 47 CFR § 0.459(b); *id.* § 0.459(c) (specifying that “[c]asual requests [for confidential treatment] (including simply stamping pages ‘confidential’) . . . will not be considered”); *Rates for Interstate Inmate Calling Services*, WC Docket No. 12-375, Order, 35 FCC Rcd 9267 (WCB 2020) (*ICS Annual Report Transparency Order*); see *Wireline Competition Bureau Reminds Providers of Inmate Calling Services of the April 1, 2024 Deadline for Annual Reports and Certifications*, WC Docket Nos. 23-62, 12-375, Public Notice, DA 24-180 (WCB Feb. 28, 2024).

¹³ *ICS Annual Report Transparency Order*, 35 FCC Rcd at 9267, para. 1.

¹⁴ *Id.*

¹⁵ See *Rates for Interstate Inmate Calling Services*, WC Docket No. 12-375, Report and Order on Remand and Fourth Further Notice of Proposed Rulemaking, 35 FCC Rcd 8485, 8502, 8533, paras. 51, 133 (2020) (citing 47 CFR § 6060).

¹⁶ See 47 U.S.C. §§ 502, 503(b).

Alternative Method for Calculating Average Daily Population means any method to calculate the Average Daily Population other than the sum of all Incarcerated People in a Correctional Facility for each day of the preceding calendar year divided by the number of days in that year, calculated each year on or before April 30.

Alternate Pricing Plan or Plan means the offering of Incarcerated People's Communications Services to Consumers using a pricing structure other than per-minute pricing, as set forth in 47 CFR § 64.6140.

Ancillary Service means a service associated with the provision of Audio IPCS or Video IPCS.

Ancillary Service Charge means any charge to Consumers associated with the provision or use of Incarcerated People's Communications Services that is not:

- (1) Included in the per-minute charges assessed, in accordance with §§ 64.6010 and 64.6030 of this chapter, for individual Incarcerated People's Communications Services;
- (2) Included in the charges assessed, in accordance with § 64.6140 of this chapter, in connection with an Alternate Pricing Plan; or
- (3) An Authorized Fee, a Mandatory Fee, or a Mandatory Tax.

Annual Certification Form means FCC Form 2301(b).

Annual Reporting Form means FCC Form 2301(a). This form consists of (1) the Word template, FCC Form 2301(a)(1), and (2) the Excel template, FCC Form 2301(a)(2).

Audio IPCS means all services classified as Incarcerated People's Communications Services within the meaning of 47 CFR § 64.6000, including: (a) Interconnected VoIP Service; (b) Non-Interconnected VoIP Service; (c) all Telecommunications Relay Services (TRS), including the use of a device or transmission service to access TRS; and (d) all Point-to-Point Video Services made available to Incarcerated People for communication in American Sign Language (ASL) with other ASL users.

Authorized Fee means a government authorized, but discretionary, fee which a Provider must remit to a federal, state, or local government, and which a Provider is permitted, but not required, to pass through to Consumers for or in connection with intrastate, interstate, or international Incarcerated People's Communications Services. An Authorized Fee may not include a markup, unless the markup is specifically authorized by a federal, state, or local statute, rule, or regulation.

Average Daily Population or ADP means the sum of all Incarcerated People in a Correctional Facility for each day of the preceding calendar year divided by the number of days in that year, calculated each year on or before April 30.

Billed Minutes means the number of Audio IPCS and/or Video IPCS minutes supplied during a Year for which payment is demanded.

Billing Statement or Statement of Account means the vehicle by which IPCS Account information is provided to the Consumer on a monthly basis, regardless of IPCS Account type, including: (a) the amount of any deposits in the IPCS Account; (b) the duration of any call(s) or communication(s) for which a charge is assessed; and (c) the balance remaining in the IPCS Account after deduction of those charges.

Compliance Date means the date by which a Provider must comply with the rate caps and Site Commission rules adopted in the *2024 IPCS Order*.

Apart from the exceptions described below, providers serving Prisons and large Jails (with an ADP of 1,000 or more) must comply with the Commission's new rate caps and prohibition on Site Commission payments by **January 1, 2025**. Providers serving Jails with an ADP of less than 1,000

must comply with those same rules by **April 1, 2025**.

The Commission adopted an exception for Providers serving Facilities for which a contract existing as of June 27, 2024 includes terms and conditions that would require material alteration through renegotiation due to a conflict with the Commission's newly promulgated rules involving rates, contractually prescribed Site Commissions, or passthrough charges included in the rates.

Under that exception, for Providers serving Prisons and large Jails (with an ADP of 1,000 or more) subject to such a contract, and where such contract expires on or after January 1, 2025, the Compliance Date will be **the earlier of the contract expiration date or January 1, 2026**.

Under that same exception, for Providers serving Jails with an ADP of less than 1,000 subject to such a contract, and where such contract expires on or after April 1, 2025, the Compliance Date will be **the earlier of the contract expiration date or April 1, 2026**.

For Providers serving any Facility subject to a contract existing as of June 27, 2024 that includes terms and conditions that would require renegotiation due to a provision incorporating **legally-mandated Site Commission payments**, and where the contract expires on or after July 1, 2025, the Compliance Date will be **the earlier of the contract expiration date or April 1, 2026**.

Consumer means the party paying a Provider of Incarcerated People's Communications Services.

Contract Identifier means an identifier consisting of at least one alphabetic character that uniquely identifies each contract under which you provided IPCS during the Reporting Period.

Contracting Authority means an entity with authority to enter into contracts on behalf of a Facility, including any Facility that does its own contracting.

Contractor means the Provider that has a contractual or other arrangement with a Contracting Authority to provide IPCS at a Facility.

Disability Access Service means TRS, TTY-to-TTY Calling, and Point-to-Point ASL Video Service, or access to such services when offered by another provider.

Facility means a Prison or Jail. For the purposes of this annual report, other synonymous terms such as "correctional facility," "correctional institution," and "detention facility" refer to "Facility" as defined.

Facility Identifier means an identifier consisting of at least one alphabetic character that uniquely identifies each Facility for which you provided IPCS during the Reporting Period.

Incarcerated People's Communications Services or IPCS means the provision of telephone service; Interconnected VoIP Service; Non-Interconnected VoIP Service; Interoperable Video Conferencing Service; and any audio or video communications service used by Incarcerated People for the purpose of communicating with individuals outside the Facility where the Incarcerated Person is held, regardless of the technology used and regardless of interstate, intrastate or international jurisdiction.

Incarcerated People's Communications Service Account or IPCS Account means any type of account administered, or directly or indirectly controlled by a Provider or an Affiliate of a Provider that can be

used to pay IPCS rates and charges, including accounts where the Incarcerated Person is the account holder.

Incarcerated Person or Incarcerated People means a person or persons detained at a Jail or Prison, regardless of the duration of the detention.

Interconnected Voice over Internet Protocol or Interconnected VoIP means a service that: (i) enables real-time, two-way voice communications; (ii) requires a broadband connection from the user's location; (iii) requires Internet protocol-compatible customer premises equipment; and (iv) permits users generally to receive calls that originate on the public switched telephone network and to terminate calls to the public switched telephone network.

International Communications means communications that originate in the United States and terminate outside the United States.

International Destination means the rate zone in which an International Communication terminates. For countries that have a single rate zone, International Destination means the country in which an International Communication terminates.

Internet Protocol Captioned Telephone Service or IP CTS means a Telecommunications Relay Service that permits an individual who can speak but who has difficulty hearing over the telephone to use a telephone and an Internet Protocol-enabled device via the Internet to simultaneously listen to the other party and read captions of what the other party is saying. With IP CTS, the connection carrying the captions between the relay service provider and the relay service user is via the Internet, rather than the public switched telephone network. See 47 CFR § 64.601(a).

Internet Protocol Relay Service or IP Relay means a Telecommunications Relay Service that permits an individual with a hearing or a speech disability to communicate in text using an Internet Protocol-enabled device via the Internet, rather than using a text telephone (TTY) and the public switched telephone network. See 47 CFR § 64.601(a).

Interoperable Video Conferencing Service means a service that provides real-time video communications, including audio, to enable users to share information of the user's choosing.

Interstate Communication means, pursuant to 47 U.S.C. § 153(28), communication or transmission (a) from any state, territory, or possession of the United States (other than the Canal Zone), or the District of Columbia, to any other state, territory, or possession of the United States (other than the Canal Zone), or the District of Columbia, (b) from or to the United States to or from the Canal Zone, insofar as such communication or transmission takes place within the United States, or (c) between points within the United States but through a foreign country. "Interstate Communication" shall not, for purposes of these Instructions, include wire or radio communication between points in the same state, territory, or possession of the United States, or the District of Columbia, through any place outside thereof, if such communication is regulated by a state commission.

Intrastate Communication means any communication that originates and terminates in the same state, territory, or possession of the United States (other than the Canal Zone), or the District of Columbia.

IPCS-Related Operations means the actions or tasks performed by the Provider or authorized personnel to deliver IPCS and associated Ancillary Services to Incarcerated People and those they communicate with,

including but not limited to billing, customer service, and other requirements as determined by contract or by law. It excludes all Site Commission payments, including in-kind Site Commission payments.

IPCS-Related Products and Services means any hardware, software, applications, devices, products, or services used by a Provider or under a Provider's direction as part of its IPCS-Related Operations. IPCS-Related Products and Services also may support a company's non-IPCS Services and Products.

Jail means a Facility of a local, state, or federal law enforcement agency that is used primarily to hold individuals who are:

- (a) Awaiting adjudication of criminal charges;
- (b) Post-conviction and committed to confinement for sentences of one year or less; or
- (c) Post-conviction and awaiting transfer to another Facility. The term also includes city, county, or regional facilities that have contracted with a private company to manage day-to-day operations; privately owned and operated Facilities primarily engaged in housing city, county or regional Incarcerated People; immigration detention facilities operated by, or pursuant to contracts with, federal, state, city, county, or regional agencies; juvenile detention centers; and secure mental health facilities.

Non-Interconnected VoIP Service means a service that enables real-time voice communications that originate from or terminate to the end-user's location using Internet Protocol or any successor protocol; and requires Internet Protocol compatible customer premises equipment; and does not include any service that is an Interconnected VoIP Service.

Non-Internet Protocol Captioned Telephone Service or Non-IP CTS means a Telecommunications Relay Service that permits an individual who can speak but who has difficulty hearing over the telephone to simultaneously listen to the other party and read captions of what the other party is saying. With Non-IP CTS, the connecting carrying the captions between the relay service provider and the relay service user is via the telephone network.

Other Products and Services means products and services other than Audio IPCS, Video IPCS, Ancillary Services, and any safety and security measures used and useful in the provision of IPCS.

Point-to-Point ASL Video Service means a point-to-point video service that enables incarcerated people to engage in real-time direct video communication in American Sign Language (ASL) with another ASL speaker. See 47 CFR § 64.601(a).

Prison means a Facility operated by a territorial, state, or federal agency that is used primarily to confine individuals convicted of felonies and sentenced to terms in excess of one year. The term also includes public and private Facilities that provide outsource housing to other agencies such as the State Departments of Correction and the Federal Bureau of Prisons; and Facilities that would otherwise fall under the definition of Jail but in which the majority of Incarcerated People are post-conviction and are committed to confinement for sentences of longer than one year.

Provider, IPCS Provider, or Provider of Incarcerated People's Communications Services means any communications service provider that provides Incarcerated People's Communications Services, regardless of the technology used, as defined in 47 CFR § 64.6000. This definition includes all Contractors, as defined above, as well as all Subcontractors as defined below, to the extent that their activities otherwise include the provision of Incarcerated People's Communications Services.

Reporting Period means the Year immediately preceding the Year during which an Annual Report is due. For example, the Reporting Period for the Annual Report due in April 2024 was January 1, 2023 through December 31, 2023.

Revenue-Sharing Agreement means any agreement, whether express, implied, written, or oral that is: between a Provider or any Affiliate and a Third Party, such as a financial institution, or between a Provider and any of its Affiliates that, over the course of the agreement, directly or indirectly results in the payment of all or part of the revenue received from the provision of IPCS to the other party to the agreement.

Site Commissions means any form of monetary payment, in-kind payment, gift, exchange of services or goods, fee, technology allowance, or product that a Provider of Incarcerated People's Communications Services or Affiliate of a Provider of Incarcerated People's Communications Services may pay, give, donate, or otherwise provide to an entity that operates a Correctional Institution, an entity with which the Provider of Incarcerated People's Communications Services enter into an agreement to provide Incarcerated People's Communications Services, a governmental agency that oversees a Correctional Facility, the city, county, or state where a Facility is located, or an agent of any such Facility.

Speech-to-Speech Relay Service or STS means a Telecommunications Relay Service that allows individuals with speech disabilities to communicate with voice telephone users through the use of specially trained communications assistants who understand the speech patterns of persons with speech disabilities and can repeat the words spoken by that person. See 47 CFR § 64.601(a).

Subcontractor means an entity that provides IPCS at or for a Facility on behalf of a Provider that has a contractual or other arrangement with a Contracting Authority to provide IPCS at or for the Facility. A Subcontractor need not have a direct contractual relationship with a Contracting Authority.

Telecommunications Relay Services or TRS mean telephone transmission services that provide the ability for an individual who is deaf, hard of hearing, deaf-blind, or who has a speech disability to engage in communication by wire or radio with one or more individuals, in a manner that is functionally equivalent to the ability of a hearing individual who does not have a speech disability to communicate using voice communication services by wire or radio. See 47 CFR § 64.601(a). The six types of TRS are: Video Relay Service (VRS); Internet Protocol Relay Service (IP Relay); Internet Protocol Captioned Telephone Service (IP CTS); Non-Internet Protocol Captioned Telephone Service (Non-IP CTS); Speech-to-Speech Relay Service (STS); and Traditional (TTY-Based) TRS.

Termination Charges, as used herein, are the charges billed to the Consumer for terminating communications to the International Destination.

Text Telephone or TTY means a machine that employs graphic communication in the transmission of coded signals through a wire or radio communication system. TTY replaces the terms "TDD," "telecommunications device for the deaf," and "TT." See 47 CFR § 64.601(a).

Third Party means an entity that is not a Provider, a Provider's Subcontractor, an Affiliate of a Provider, or a Facility.

Traditional (TTY-Based) TRS means a Telecommunications Relay Service that allows a person with a hearing or speech disability to converse with voice telephone users by using a Text Telephone (TTY) to communicate in text with a TRS communications assistant via the telephone network.

TTY-to-TTY Calling means a call or communication where each person is using a TTY to communicate to allow a person with a hearing or speech disability to converse with another person with a hearing or speech disability.

Video IPCS means any video communications service used by Incarcerated People for the purpose of communicating with individuals outside the correctional institution where the people are incarcerated, regardless of the technology used. It typically includes an integrated audio component and excludes all services classified as Audio IPCS, as well as Other Products and Services, such as one-way entertainment, educational, religious, vocational, and instructional programming.

Video Relay Service or VRS means a Telecommunications Relay Service that allows people with hearing or speech disabilities who use sign language to communicate with voice telephone users through video equipment. The video link allows the communications assistant to view and interpret the party's signed conversation and relay the conversation back and forth with a voice caller. See 47 CFR § 64.601(a).

Year means a calendar year, beginning January 1 and ending December 31 of any given year.

IV. ANNUAL REPORT REQUIREMENTS

ReadMe

The ReadMe worksheet in the Excel template provides an introduction and general guidelines for entering information in other worksheets in that template. Do not enter anything in this worksheet.

Crosswalk Excel to Instructions

The Crosswalk worksheet in the Excel template explains how the sections of these Instructions correspond to the specific tabs in that template. Do not enter anything in this worksheet.

A. Basic Information

This section directs you to provide general information and data about the Provider and its Affiliates for the Reporting Period. Enter your responses for items IV.A.1 through IV.A.11 in Tab A of the Excel template and your responses to items IV.A.12 through IV.A.16 in the Word template.

(1) Provider Name: Provide the name under which the Provider offers IPCS. If the Provider offers IPCS under more than one name, list all relevant names.

(2) Reporting Period: Provide the relevant time period for the information the report covers.

(3) Officer Name, Title: Provide the name and title of the officer authorized to certify FCC Form 2301(a). The officer may be the Chief Executive Officer (CEO), Chief Financial Officer (CFO), or other senior executive of the Provider who can attest to the truthfulness, accuracy, and completeness of the information provided.

(4) Officer Telephone Number: Provide the business telephone number with area code (containing ten digits) for the officer identified in item IV.A.3.

(5) Officer E-Mail Address: Provide the business e-mail address of the officer identified in item IV.A.3.

(6) Total Number of Facilities Served by Provider: Provide the total number of Facilities in which you offered IPCS during the Reporting Period. You must include Facilities that you no longer serve if you served them during the Reporting Period.

(7) Number of Prisons Served by Provider: Provide the total number of Prisons in which you offered IPCS during the Reporting Period. You must include Prisons that you no longer serve, if you served them during the Reporting Period.

(7)(a) Audio IPCS Only Prisons: Provide the total number of Prisons in which you only offered Audio IPCS during the Reporting Period.

(7)(b) Video IPCS Only Prisons: Provide the total number of Prisons in which you only offered Video IPCS during the Reporting Period.

(7)(c) Audio and Video IPCS Prisons: Provide the total number of Prisons in which you offered both Audio and Video IPCS during the Reporting Period.

(8) Number of Jails Served by Provider with Average Daily Population (ADP) Below 100: Provide the number of Jails in which you offered IPCS during the Reporting Period that have an ADP below 100. You must include Jails that you no longer serve, if you served them during the Reporting Period.

(8)(a) Audio IPCS Only Jails Served with ADP Below 100: Provide the total number of Jails served with ADP below 100 in which you only offered Audio IPCS during the Reporting Period.

(8)(b) Video IPCS Only Jails Served with ADP Below 100: Provide the total number of Jails served with ADP below 100 in which you only offered Video IPCS during the Reporting Period.

(8)(c) Audio and Video IPCS Jails Served with ADP Below 100: Provide the total number of Jails served with ADP below 100 in which you offered both Audio and Video IPCS during the Reporting Period.

(9) Number of Jails Served by Provider with Average Daily Population (ADP) Between 100 and 349: Provide the number of Jails in which you offered IPCS during the Reporting Period that have an ADP between and including 100 and 349. You must include Jails that you no longer serve, if you served them during the Reporting Period.

(9)(a) Audio IPCS Only Jails Served with ADP Between 100 and 349: Provide the total number of Jails served with ADP between and including 100 and 349 in which you only offered Audio IPCS during the Reporting Period.

(9)(b) Video IPCS Only Jails Served with ADP Between 100 and 349: Provide the total number of Jails served with ADP between and including 100 and 349 in which you only offered Video IPCS during the Reporting Period.

(9)(c) Audio and Video IPCS Jails Served with ADP Between 100 and 349: Provide the total number of Jails served with ADP between and including 100 and 349 in which you offered both Audio and Video IPCS during the Reporting Period.

(10) Number of Jails Served by Provider with Average Daily Population (ADP) Between 350 and 999: Provide the number of Jails in which you offered IPCS during the Reporting Period that have an ADP between and including 350 and 999. You must include Jails that you no longer serve, if you served them during the Reporting Period.

(10)(a) Audio IPCS Only Jails Served with ADP Between 350 and 999: Provide the total number of Jails served with ADP between and including 350 and 999 in which you only offered Audio IPCS during the Reporting Period.

(10)(b) Video IPCS Only Jails Served with ADP Between 350 and 999: Provide the total number of Jails served with ADP between and including 350 and 999 in which you only offered Video IPCS during the Reporting Period.

(10)(c) Audio and Video IPCS Jails Served with ADP Between 350 and 999: Provide the total number of Jails served with ADP between and including 350 and 999 in which you offered both Audio and Video IPCS during the Reporting Period.

(11) Number of Jails Served by Provider with ADP of 1,000 or More: Provide the number of Jails in which you offered IPCS during the Reporting Period that have an ADP of 1,000 or more. You must include Jails that you no longer serve if you served them during the Reporting Period.

(11)(a) Audio IPCS Only Jails Served with ADP of 1,000 or More: Provide the total number of Jails served with ADP of 1,000 or more in which you only offered Audio IPCS during the Reporting Period.

(11)(b) Video IPCS Only Jails Served with ADP of 1,000 or More: Provide the total number of Jails served with ADP of 1,000 or more in which you only offered Video IPCS during the Reporting Period.

(11)(c) Audio and Video IPCS Jails Served with ADP of 1,000 or More: Provide the total number of Jails served with ADP of 1,000 or more in which you offered both Audio and Video IPCS during the Reporting Period.

(12) Provider Name: In the Word template, provide the name under which the Provider offers IPCS. List all relevant names if the Provider offers IPCS under more than one name.

(13) Facilities Served Less than a Full Year: In the Word template, provide the names of all Facilities that you served for less than a full Year during the Reporting Period and the corresponding dates of your service (e.g., [Facility Name], from mm/dd/yyyy to mm/dd/yyyy). If you served all Facilities reported in item IV.A.6 during the entirety of the Reporting Period, enter “The Provider served each Facility listed in the Excel template throughout the entire Reporting Period” (without the quotation marks).

(14) Explanation of Alternative Method for Calculating Average Daily Population: In the Word template, provide the names of all Facilities for which the ADP reported reflects an Alternative Method for Calculating Average Daily Population. Describe in detail the method used to calculate ADP for each of those Facilities.

(15) Narrative Description of a Subcontract to Provide IPCS: If a Provider contracts with a Subcontractor to provide any aspect of IPCS, the Provider and the Subcontractor shall explain each such arrangement in the Word template of their respective Annual Reports. At a minimum, this explanation shall include:

- (a) The name of the Provider with the contractual or other agreement with a Facility or Contracting Authority for the provision of IPCS;
- (b) The name, address, and contact information of the Subcontractor;
- (c) The services provided by the Subcontractor under the agreement;
- (d) The Facility Identifier and address for the Facilities at which the Subcontractor provides services under the agreement;
- (e) A description of the IPCS-Related Operations and/or IPCS-Related Products and Services provided by the Provider;
- (f) A description of the IPCS-Related Operations and/or IPCS-Related Products and Services provided by the Subcontractor;

- (g) A list of the types of IPCS billed by the Provider;
- (h) A detailed description of any Revenue-Sharing Agreement between the Provider and the Subcontractor, including any such Agreement with regard to proceeds from those communications and services billed by the Provider; and
- (i) A list of the types of IPCS billed by the Subcontractor and a description of any Revenue-Sharing Agreement between the Provider and the Subcontractor, including any such Agreement with regard to proceeds from those communications and services.

(16) Additional Information: In the Word template, provide any additional information needed to ensure that your entries for Basic Information are full and complete.

B. Contract & Facility Information

This section directs you to report information about each contract and Facility you serve in Tab B of the Excel template. All the requested information will be entered in the Excel spreadsheet. None of these responses will be entered in the Word template.

(1) Contracting Parties: In the three sub-columns, enter the requested information about each contract for the provision of IPCS that the Provider held during the Reporting Period.

(1)(a) IPCS Contractor: Enter the name of the IPCS Contractor for a particular contract.

(1)(b) IPCS Subcontractor (if any): Enter the name of any Subcontractor that provided IPCS related to that particular contract.

(1)(c) Contracting Authority: Enter the name of the Contracting Authority, such as a state or county name, that was a party to that contract.

(2) Contract Identifier: Identify each contract under which you provided IPCS during the Reporting Period by using an identifier consisting of at least one alphabetic character that uniquely identifies that contract. If you filed a response to the 2023 Mandatory Data Collection, use as your Contract Identifiers the “Unique Identifier[s] for Contract[s]” used in that filing plus any additional Contract Identifiers required for new contracts. The same Contract Identifier shall be provided on each tab that requests the Contract Identifier. After you enter the Contract Identifier in Tab B, the Excel spreadsheet will automatically populate the appropriate columns in Tabs C to H. Note that the Contract Identifiers you use in one Annual Report should be carried forward into subsequent Annual Reports, to the extent you continue to provide IPCS under the same contracts.

(3) Facilities Covered by Contract: In the two sub-columns, list the Facilities covered by the identified contract. If there is more than one Facility covered by a contract, use separate rows in the worksheet for each Facility, and repeat 1(a), 1(b), 1(c) and (2) for each of those rows.

(3)(a) Facility Name: Enter the name of the Facility.

(3)(b) Facility Identifier: Identify each Facility you served during the Reporting Period by using an identifier consisting of at least one alphabetic character that uniquely identifies that Facility. If you filed a response to the 2023 Mandatory Data Collection, use as your Facility Identifiers the “Unique Identifier[s] for Facilit[ies]” used in that filing plus any additional Facility Identifiers required for newly served Facilities. The same Facility Identifier shall be provided on each tab that requests the Facility Identifier. After you enter the Facility Identifier in Tab B, the Excel spreadsheet will automatically populate the appropriate columns in Tabs C to H. Note that the

Facility Identifiers you use in one Annual Report should be carried forward into subsequent Annual Reports, to the extent you continue to provide IPCS for the same Facilities.

(3)(c) Facility IPCS Offered: From the drop down menu, indicate the service offered by the Provider at that Facility for the Reporting Period by selecting “Audio IPCS Only,” “Video IPCS Only,” or “Audio and Video IPCS” as appropriate for each Facility.

(3)(d) Compliance Date for Facility: Using the mm/dd/yyyy format, report the Compliance Date for each Facility at which the Compliance Date occurred during or prior to the Reporting Period. If the Compliance Dates for a Facility did not occur during or before the Reporting Period, leave the Compliance Date for that Facility blank.

(4) Facility Type and Size: In the three sub-columns, enter the requested information about the size and type of each Facility listed in response to item IV.B.3.

(4)(a) Facility Type: Indicate whether the relevant Facility is a Prison or a Jail by selecting “Prison” or “Jail” from the drop-down menu.

(4)(b) Average Daily Population (ADP): Provide the ADP that corresponds to each Facility. You must enter an integer in this column.

(4)(c) Facility rate tier: Indicate the type and size tier applicable to each Facility by selecting “Prison,” “Jail 0-99,” “Jail 100-349,” “Jail 350-999,” or “Jail 1000+” from the drop-down menu.

(5) Location of Facilities: In the six sub-columns, enter the location of the Facility and its geographical coordinates. This location shall be the physical location of the Facility, not the mailing address. Thus, no PO boxes will be accepted.

(5)(a) Facility Street Number and Name: Enter the street number and name for the Facility.

(5)(b) Facility Building Identifier (if one exists): Enter the building identifier for the Facility, if one exists.

(5)(c) Facility City: Enter the name of the city where the Facility is located. If the Facility is not located in a city, enter the name of the municipality, town, township, village, borough or other political subdivision used as the location of the Facility.

(5)(d) Facility State: Enter the two-letter postal abbreviation for the state where the Facility is located.

(5)(e) Facility ZIP: Enter the five-digit ZIP code, or the ZIP+4 code (entered as five digits, a hyphen, and four digits, with no spaces in between) associated with the Facility’s street address.

(5)(f) Geographical Coordinates: Enter the geographical coordinates of each listed Facility. Use decimal degrees (DD) to express latitude and longitude geographic coordinates. (These coordinates can be identified using a geocoding application available on the Internet.) Do not use the words “latitude” or “longitude,” or any abbreviations of those words.

C. Interstate and Intrastate Audio IPCS Rates

This section directs you to report interstate and intrastate Audio IPCS rates you charged at each Facility you served during the Reporting Period. Enter your responses to items IV.C.1.a and IV.C.2.a in Tab C of the Excel template, and your responses to items IV.C.1.b and IV.C.2.b in the Word template. Instructions in this section that direct you to respond “Yes” or “No” should be reported in the appropriate columns provided in the Excel template.

Contract & Facility Information from Tab B:

Contract Identifiers: The Excel template should automatically enter your Contract Identifiers in this column as you entered them in Tab B. Check to make sure the unique Contract Identifier in this tab correctly aligns with your data in this tab.

Facility Identifiers: The Excel template should automatically enter your Facility Identifiers in this column as you entered them in Tab B. Check to make sure the unique Facility Identifier in this tab correctly aligns with your data in this tab.

Compliance Dates: The Excel template should automatically enter your Compliance Date for each Contract in this column as you entered them in Tab B. Check to make sure each Compliance Date in this tab correctly aligns with your data in this tab.

Facility rate tiers: The Excel template should automatically enter the Facility rate tiers in this column as you entered them in Tab B. Check to make sure the Facility rate tiers in this tab correctly align with your data in this tab.

Uniform Interstate and Intrastate Rates: In this column, using “Yes” or “No” from the drop-down menu, report whether the rates you charged for intrastate Audio IPCS at each Facility are the same as the rates you charged for interstate Audio IPCS at that Facility, i.e. if your responses to items IV.C.1.a for each Facility are the same as those reported for IV.C.2.a for each Facility during the Reporting Period.

For each Facility for which you respond “Yes” in this manner, provide responses to item IV.C.1.a, and otherwise leave the cells for that Facility under columns IV.C.2.a regarding intrastate rates blank.

For each Facility for which you respond “No,” i.e., the rates you charged for intrastate Audio IPCS at each Facility are not the same as the rates you charged for interstate Audio IPCS, provide information pertaining to the rates charged for intrastate Audio IPCS as directed below.

(1) Interstate Rates: In this column, provide information pertaining to the rates you charged for interstate Audio IPCS communications from each Facility you served during the Reporting Period.

(1)(a) Highest Per-Minute Rate: Report the highest amount you charged per minute for interstate Audio IPCS communications from each Facility during the Reporting Period in sub-column (1)(a). If you offered different interstate audio rates within the Reporting Period or changed interstate audio rates during the Reporting Period, you must report the highest per-minute rate charged even if a lower rate was also available to Consumers at some point during the Reporting Period.

(1)(b) Additional Information for Interstate Rates: In the Word template, provide any additional information needed to ensure that your entries for interstate Audio IPCS rates are full and complete.

(2) Intrastate Rates: In this column, for each Facility for which you responded “No” to the Uniform Interstate and Intrastate Rates question, provide information pertaining to the rates you charged for intrastate Audio IPCS communications from each Facility you served during the Reporting Period.

(2)(a) Highest Per-Minute Rate: Report the highest amount you charged per minute for intrastate Audio IPCS communications from each Facility during the Reporting Period in column (2)(a). If you charged different intrastate audio rates within the Reporting Period or changed intrastate audio rates during the Reporting Period, you must report the highest per-minute rate charged even if a lower rate was also available to Consumers at some point during the Reporting Period.

(2)(b) Additional Information for Intrastate Rates: In the Word template, provide any additional information needed to ensure that your entries for intrastate Audio IPCS rates are full and complete.

International Audio IPCS Provided? Report whether you provided Audio IPCS to International Destinations at this Facility by selecting “Yes” or “No” from the drop down menu. If you did not provide any international Audio IPCS at any Facility you served during the Reporting Period, marking “No” for each Facility, you are not required to complete the information requests in section IV.D. International Audio IPCS Rates, below.

D. International Audio IPCS Rates

This section directs you to report the highest Audio IPCS rates you charged for International Communications to each called International Destination during the Reporting Period. Enter your responses to items IV.D.1 through IV.D.3 in Tab D of the Excel template and your responses to items IV.D.4, IV.D.5, and IV.D.6 in the Word template. Instructions in this section that direct you to respond “Yes” or “No” should be reported in the appropriate columns provided in the Excel template.

International Rates: Provide information pertaining to your per-minute rates and Termination Charges for Audio IPCS International Communications for each International Destination called using your service during the Reporting Period.

(1) Destination: Enter every International Destination at which Audio IPCS International Communications from each Facility you served were terminated at any time during the Reporting Period.

(2) Interstate Portion of International Rates: Select “Yes” from the drop-down menu if the interstate portion of your international IPCS rates to the called International Destination (i.e., your international IPCS rate minus any international Termination Charges) was the same as the interstate rates you charged for Interstate Communications. If you select “Yes,” you are not required to respond to items IV.D.3.a., IV.D.3.c, IV.D.3.e, and IV.D.3.g. Select “No” from the drop-down menu if the interstate portion of your international IPCS rates differed from the interstate rates you charged for Audio IPCS communications. If you select “No,” you must explain how they differed in the Word template, as further described in item IV.D.5 below.

(3) Highest Total Per-Minute Rate: Enter the highest rate you charged per minute for International Communications using Audio IPCS, including any Termination Charge, for each International Destination that was called during the Reporting Period.

Quarter 1: January-March

(3)(a) Highest Interstate Per-Minute Rate: If you charged a rate for the interstate portion of your international IPCS rates that differed from your interstate rates, enter the highest per-minute rate you charged to the called International Destination. If the interstate portion of your international IPCS rates to the called destination is the same as your interstate rates or no communications were made from a Facility to that International Destination in Q1, leave the cell blank.

(3)(b) Average Termination Charge: Enter the average per-minute amount you charged to Consumers for terminating Audio IPCS International Communications to the corresponding International Destinations during Q1. This number shall be calculated as (total amount charged to Consumers for terminating communications from each Facility to each International Destination) / (total number of Billed Minutes for the communications from each Facility to each International Destination). If no communications were made to that International Destination in Q1, leave the cell blank.

Quarter 2: April-June

(3)(c) Highest Interstate Per-Minute Rate: Following the instructions for IV.D.3.a, enter the highest per-minute rate for Q2.

(3)(d) Average Termination Charge: Following the instructions for IV.D.3.b, enter the average per-minute Termination Charge for Q2.

Quarter 3: July-September

(3)(e) Highest Interstate Per-Minute Rate: Following the instructions for IV.D.3.a, enter the highest per-minute rate for Q3.

(3)(f) Average Termination Charge: Following the instructions for IV.D.3.b, enter the average per-minute Termination Charge for Q3.

Quarter 4: October-December

(3)(g) Highest Interstate Per-Minute Rate: Following the instructions for IV.D.3.a, enter the highest per-minute rate for Q4.

(3)(h) Average Termination Charge: Following the instructions for IV.D.3.b, enter the average per-minute Termination Charge for Q4.

(4) Applicable Facilities: Report in the Word template, using the Contract Identifiers and Facility Identifiers entered into Tab B, which facilities used International Audio IPCS at the highest total rates you reported for each International Destination.

(5) Interstate Portion of International Rates: If any of your answers for item IV.D.2 are “No,” explain in the Word template how the interstate portion of your international Audio IPCS rates differed from the interstate rates you charged for communications from the Facility.

(6) Additional Information: In the Word template, provide any additional information needed to ensure that your entries for international rates for Audio IPCS are full and complete. The Excel template also includes a Comments column for you to provide additional information.

E. Interstate and Intrastate Video IPCS Rates

This section directs you to report interstate and intrastate Video IPCS per-minute rates you charged at each Facility you served during the Reporting Period. Enter your responses to items IV.E.1 and IV.E.2 in Tab E of the Excel template and your responses to items IV.E.1.b, IV.E.2.b, and IV.E.3 in the Word template. Instructions in this section that direct you to respond “Yes” or “No” should be reported in the appropriate columns provided in the Excel template.

Contract & Facility Information from Tab B:

Contract Identifiers: The Excel template should automatically enter your Contract Identifiers in this column as you entered them in Tab B. Check to make sure each unique Contract Identifier in this tab correctly aligns with your data in this tab.

Facility Identifiers: The Excel template should automatically enter your Facility Identifiers in this column as you entered them in Tab B. Check to make sure each unique Facility Identifier in this tab correctly aligns with your data in this tab.

Compliance Dates: The Excel template should automatically enter your Compliance Date for each Contract in this column as you entered them in Tab B. Check to make sure each Compliance Date in this tab correctly aligns with your data in this tab.

Facility rate tiers: The Excel template should automatically enter the Facility rate tier in this column as you entered it in Tab B. Check to make sure the Facility rate tiers in this tab correctly align with your data in this tab.

Uniform Interstate and Intrastate Rates: In this column, using “Yes” or “No” from the drop-down menu, report whether the rates you charged for interstate Video IPCS at each Facility are the same as the rates you charged for intrastate Video IPCS, i.e., if your responses to items IV.E.1.a, below, are the same as those reported for IV.E.3.a, below, for Video IPCS communications from each Facility during the Reporting Period. For each Facility for which you respond “Yes” in this manner, provide responses to item IV.E.1.a, and otherwise leave the cells for that Facility under column IV.E.2.a regarding intrastate rates blank.

(1) Interstate Rates: In this column, provide information pertaining to the rates you charged for interstate Video IPCS communications from each Facility you served during the Reporting Period. For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for the rates you charged from November 19, 2024 through December 31, 2024, as the Commission’s rules requiring that providers charge per-minute rates for Video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

(1)(a) Highest Rate for a Video Communication: Report the highest rate you charged for interstate Video IPCS communications from each Facility during the Reporting Period in sub-column (1)(a). If you charged different interstate rates within the Reporting Period or changed interstate rates during the Reporting Period, you must report the highest per-minute rate charged even if a lower rate was also available to Consumers at some point during the Reporting Period.

(1)(b) Additional Information for Interstate Rates: In the Word template, provide any additional information needed to ensure that your entries for interstate Video IPCS rates are full and complete.

(2) Intrastate Rates: In this column, for each Facility for which you responded “No” to the Uniform Interstate and Intrastate Rates question, provide information pertaining to the rates you charged for intrastate Video IPCS communications from each Facility you served during the Reporting Period. For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for the rates you charged from November 19, 2024 through December 31, 2024, as the Commission’s rules requiring that providers charge per-minute rates for Video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

(2)(a) Highest Rate for a Video Communication: Report the highest amount you charged for intrastate Video IPCS communications from each Facility during the Reporting Period in sub-column (2)(a). If you charged different intrastate rates within the Reporting Period or changed intrastate rates during the Reporting Period, you must report the highest per-minute rate charged even if a lower rate was also available to Consumers at some point during the Reporting Period.

(2)(b) Additional Information for Intrastate Rates: In the Word template, provide any additional information needed to ensure that your entries for intrastate Video IPCS rates are full and complete.

International Video IPCS Provided? Report whether you provided Video IPCS to International Destinations at this Facility by selecting “Yes” or “No” from the drop down menu. If you did not provide any international Video IPCS communications at any Facility you served during the reporting period, marking “No” for each Facility, you are not required to complete the information requests in section IV.F. International Video IPCS Rates, below.

(3) Description of Video IPCS: In the Word template, describe in detail each type of Video IPCS provided at or for the Facilities during the Reporting Period.

Comments: A column labeled “Comments” has been provided in the Excel template as extra space for any notes or clarifications you wish to include. If your responses are longer than the space provided, please include them in the Additional Information spaces provided in the Word template.

F. International Video IPCS Rates

This section directs you to report the highest Video IPCS rates you charged for International Communications to each called International Destination during the Reporting Period. Enter your responses to items IV.F.1 through IV.F.3 in Tab F of the Excel template and your responses to items IV.F.4, IV.F.5 and IV.F.6 in the Word template. Instructions in this section that direct you to respond “Yes” or “No” should be reported in the appropriate columns provided in the Excel template.

International Rates: Provide information pertaining to your rates and Termination Charges for international Video IPCS communications to each International Destination called using your service during the Reporting Period.

International Video Rates Same as Interstate Video Rates: Using the dropdown menu, report whether the total international Video IPCS rates you charged were the same as the rates you charged for interstate Video IPCS by selecting either “Yes” or “No.”

Select “Yes” only if your interstate rates are the same as your international Video IPCS rates and if you do not charge or pass through Termination Charges for completing international Video IPCS communications. If you report “Yes,” you are not required to complete instructions (2) through (4) as indicated below. If you report “No,” you are required to complete the remaining instructions in this section.

(1) Destination: In this column, enter every International Destination at which international Video IPCS communications from the Facilities you served were completed at any time during the Reporting Period.

(2) Interstate Portion of International Rates: Select “Yes” from the drop-down menu if the interstate portion of your international Video IPCS rates to the called International Destination (i.e., your international IPCS rate minus any international Termination Charges) was the same as the rates you charged for interstate Video IPCS during the Reporting Period. If you select “Yes,” you are not required to respond to items IV.F.3.a., IV.F.3.c, IV.F.3.e, and IV.F.3.g. Select “No” from the drop-down menu if the interstate portion of your international Video IPCS rates differed from the interstate rates you charged for Video IPCS communications. If you select “No,” explain in the Word template how those rates differed, as further described in item IV.F.5 below.

For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for the rates you charged from November 19, 2024 through December 31, 2024, as the Commission’s rules requiring providers charge per-minute rates for video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

(2)(a) Termination Charges for International Video IPCS: Report whether you charged or passed through international Termination Charges for Video IPCS communications made to International Destinations.

Select “Yes” from the drop-down menu if you charged or passed through termination charges for Video IPCS to the called destination.

If you did not charge or pass through international Termination Charges for international Video IPCS to the called destination, select “No” from the drop down menu, and you are not required to respond to items IV.F.3.b, IV.F.3.d, IV.F.3.f, and IV.F.3.h, as explained below.

For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for any Termination Charges you charged from November 19, 2024 through December 31, 2024, as the Commission's rules requiring that providers charge per-minute rates for video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

(3) Highest Total Per-Minute Rate: Enter the highest rate you charged per minute for International Video IPCS, including any Termination Charge, for each International Destination that was called during the Reporting Period. For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for the rates you charged from November 19, 2024 through December 31, 2024, as the Commission's rules requiring that providers charge per-minute rates for video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

Quarter 1: January-March

(3)(a) Highest Interstate Per-Minute Rate: If you charged a rate for the interstate portion of your international Video IPCS rates that differed from your interstate Video IPCS rate, enter the highest rate you charged to each called International Destination. If the interstate portion of your international Video IPCS rates to the called destination is the same as your interstate rates or no communications were made from a Facility to that International Destination in Q1, leave the cell blank. For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for the rates you charged from November 19, 2024 through December 31, 2024, as the Commission's rules requiring that providers charge per-minute rates for video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

(3)(b) Average Termination Charge: Enter the average per-minute amount you charged for terminating international Video IPCS communications to the corresponding International Destinations during Q1. This number shall be calculated as (total amount charged for terminating communications from each Facility to each International Destination) / (total number of Billed Minutes for the communications from each Facility to each International Destination). If no communications were made to that International Destination in Q1, leave the cell blank. For the January 1, 2024 through December 31, 2024 Reporting Period, only provide this information for the Termination Charges you charged from November 19, 2024 through December 31, 2024, as the Commission's rules requiring that providers charge per-minute rates for video IPCS took effect on November 19, 2024. For subsequent Reporting Periods, provide this information for the entire period.

Quarter 2: April-June

(3)(c) Highest Interstate Per-Minute Rate: Following the instructions for IV.F.3.a, enter the highest per-minute rate for Q2.

(3)(d) Average Termination Charge: Following the instructions for IV.F.3.b, enter the average per-minute Termination Charge for Q2.

Quarter 3: July-September

(3)(e) Highest Interstate Per-Minute Rate: Following the instructions for IV.F.3.a, enter the highest per-minute rate for Q3.

(3)(f) Average Termination Charge: Following the instructions for IV.F.3.b, enter the average per-minute Termination Charge for Q3.

Quarter 4: October-December

(3)(g) Highest Interstate Per-Minute Rate: Following the instructions for IV.F.3.a, enter the highest per-minute rate for Q4.

(3)(h) Average Termination Charge: Following the instructions for IV.F.3.b, enter the average per-minute Termination Charge for Q4.

(4) Applicable Facilities: Report in the Word template, using the Contract Identifiers and Facility Identifiers entered into Tab B, which Facilities provided International Video IPCS at the highest total rates you reported for each International Destination.

(5) Interstate Portion of International Rates: If any of your answers for item IV.F.2 are “No,” explain in the Word template how the interstate portion of your international Video IPCS rates differed from the interstate Video IPCS rates you charged for communications from the Facility.

(6) Additional Information: In the Word template, provide any additional information needed to ensure that your entries for international rates for Video IPCS are full and complete. The Excel template also includes a Comments column for you to provide additional information.

Comments: A column labeled “Comments” has been provided in the Excel template as extra space for any notes or clarifications you wish to include. If your responses are longer than the space provided, please include them in the Additional Information space provided in the Word template.

G. Miscellaneous

Note: This section seeks data only on or after November 19, 2024 for the 2024 Reporting Period. You are instructed not to consider any charges, payments, gifts, or exchanges for the requests prior to that date for the 2024 Reporting Period. For subsequent Reporting Periods, provide this information for the entire period.

This section directs you to report certain charges, payments, gifts, or exchanges you may have made during the Reporting Period after the Commission’s rules prohibiting such practices had come into effect. Enter your responses to items IV.G.1.a, IV.G.1.c, IV.G.1.e, IV.G.2.a, and IV.G.2.c in Tab G of the Excel template and your responses to items IV.G.1.b, IV.G.1.d, IV.G.1.f, IV.G.2.b, and IV.G.2.d in the Word template as required by the instructions provided below.

(1) Ancillary Service Charges: Below, report separately for Audio IPCS and Video IPCS whether you charged any Ancillary Service Charge on or after November 19, 2024, the date the Commission’s rule prohibiting such charges took effect.

(1)(a) Audio IPCS: In cell B7, using “Yes” or “No” from the drop-down menu, report whether you or any Subcontractor charged any Ancillary Service Charges for any Audio IPCS you provided at any Facilities on or after November 19, 2024. If you mark “Yes,” you will be required to explain further in the Word template.

(1)(b) Audio IPCS-Related Ancillary Service Charges: In the Word template, you must explain the circumstances surrounding any Ancillary Service Charges associated with Audio IPCS that you or any Subcontractor charged Consumers after the prohibition on such charges took effect on November 19, 2024. Using the Contract Identifiers and Facility Identifiers you provided in Tab B of the Excel template, report the Facilities where this occurred and include information on the types of charges assessed, the amount of each charge, and the total number of times each type of charge was assessed from each Facility. Include all information necessary to make your responses full and complete.

(1)(c) Video IPCS: In cell C7, using “Yes” or “No” from the drop-down menu, report whether you or any Subcontractor charged any Ancillary Service Charges for any Video IPCS you

provided at any Facilities on or after November 19, 2024. If you mark “Yes,” you will be required to explain further in the Word template.

(1)(d) Video IPCS-Related Ancillary Service Charges: In the Word template, you must explain the circumstances surrounding any Ancillary Service Charges associated with Video IPCS that you or any Subcontractor charged Consumers after the prohibition on such charges took effect on November 19, 2024. Using the Contract Identifiers and Facility Identifiers you provided in Tab B of the Excel template, report the Facilities where this occurred and include information on the types of charges assessed, the amount of each charge, and the total number of times each type of charge was assessed from each Facility. Include all information necessary to make your responses full and complete.

(1)(e) Billed TTY-to-TTY Calling or TTY-Based TRS: In cell D7, using “Yes” or “No” from the drop-down menu, report whether you or any Subcontractor charged any Ancillary Service Charges for any billed TTY-to-TTY calling or TTY-based TRS you provided at any Facilities after November 19, 2024. If you mark “Yes,” you will be required to explain further in the Word template.

(1)(f) Billed TTY-to-TTY Calling or TTY-Based TRS Ancillary Service Charges: In the Word template, you must explain the circumstances surrounding any Ancillary Service Charges associated with billed TTY-to-TTY Calling or TTY-Based TRS that you or any Subcontractor charged Consumers after the prohibition on such charges took effect on November 19, 2024. Using the Contract Identifiers and Facility Identifiers you provided in Tab B of the Excel template, report the Facilities where this occurred and include information on the types of charges assessed, the amount of each charge, and the total number of times each type of charge was assessed from each Facility. Include all information necessary to make your responses full and complete.

(2) Site Commissions: Below, report separately for Audio IPCS and Video IPCS whether you provided any Site Commissions payments or in-kind transfers after the Compliance Dates for the Commission Site Commission reforms. For the purposes of these questions, only respond to these questions for the period after the Compliance Date for a Facility had passed.

(2)(a) Audio IPCS: In cell E7, using “Yes” or “No” from the drop-down menu, report whether you provided any Site Commissions associated with Audio IPCS you offered at any Facilities you served after the Compliance Date. If you mark “Yes,” you will be required to explain further in the Word template.

(2)(b) Audio IPCS-Related Site Commission Payments: In the Word template, you must explain the circumstances surrounding any Site Commissions you provided associated with Audio IPCS after the Compliance Date for the Facilities you served had passed. Using the Contract Identifiers and Facility Identifiers you provided in Tab B of the Excel template, report the Facilities where this occurred and include information detailing to whom such payments, gifts, or exchanges were made, including the monetary value of the payments, gifts, or exchanges. Include as much information as necessary to render your responses full and complete.

(2)(c) Video IPCS: In cell F7, using “Yes” or “No” from the drop-down menu, report whether you provided any Site Commissions associated with Video IPCS you offered at any Facilities you served after the Compliance Date. If you mark “Yes,” you will be required to explain further in the Word template.

(2)(d) Video IPCS-Related Site Commission Payments: In the Word template, you must explain the circumstances surrounding any Site Commissions you paid associated with Video IPCS after the Compliance Date for the Facilities you served had passed. Using the Contract Identifiers and Facility Identifiers you provided in Tab B of the Excel template, report the

Facilities where this occurred and include information detailing to whom such payments, gifts, or exchanges were made, including the monetary value of the payments, gifts, or exchanges. Include as much information as necessary to render your responses full and complete.

Comments: A column labeled “Comments” has been provided in the Excel template as extra space for any notes or clarifications you wish to include. If your responses are longer than the space provided, please include them in the Additional Information spaces provided in the Word template.

H. Disability Access

This section directs you to provide, on a Facility-by-Facility basis, information regarding the availability of each Disability Access Service listed and the number of completed communications that utilized each Disability Access Service during the Reporting Period. Enter your responses for items IV.H.1 through IV.H.3 in Tab H of the Excel template, and item IV.H.4 in the Word template. Instructions directing you to respond “Yes” or “No” should be reported in the appropriate columns provided in the Excel template.

Note: The safe harbor that previously exempted some providers from TRS-related reporting requirements no longer is in effect.¹⁷

Contract & Facility Information from Tab B:

Contract Identifiers: The Excel template should automatically enter your Contract Identifiers in this column as you entered them in Tab B. Check to make sure each unique Contract Identifier in this tab correctly aligns with your data in this tab.

Facility Identifiers: The Excel template should automatically enter your Facility Identifiers in this column as you entered them in Tab B. Check to make sure each unique Facility Identifier in this tab correctly aligns with your data in this tab.

Compliance Dates: The Excel template should automatically enter your Compliance Date for each Contract in this column as you entered them in Tab B. Check to make sure each Compliance Date in this tab correctly aligns with your data in this tab.

Facility rate tiers: The Excel template should automatically enter the Facility rate tiers in this column as you entered them in Tab B. Check to make sure the Facility rate tiers in this tab correctly align with your data in this tab.

(1) Kinds of Disability Access Service Available in the Facility: For each Facility served during the Reporting Period, report the types of Disability Access Service that were available. For this item (1), a “Yes” response means that the Disability Access Service was available at some time during the Reporting Period.

(1)(a) Video Relay Service (VRS): Select “Yes” from the drop-down menu if VRS was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if VRS was not available in the Facility during the Reporting Period.

(1)(b) Internet Protocol Relay Service (IP Relay): Select “Yes” from the drop-down menu, if IP Relay was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if IP Relay was not available in the Facility during the Reporting Period.

(1)(c) Internet Protocol Captioned Telephone Service (IP CTS): Select “Yes” from the drop-down menu if IP CTS was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if IP CTS was not available in the Facility during the Reporting Period.

¹⁷ 2022 ICS Order, 37 FCC Rcd at 11923-24, para. 51.

(1)(d) Non-Internet Protocol Captioned Telephone Service (Non-IP CTS): Select “Yes” from the drop-down menu if Non-IP CTS was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if Non-IP CTS was not available in the Facility during the Reporting Period.

(1)(e) Speech-to-Speech Relay Service (STS): Select “Yes” from the drop-down menu if STS was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if STS was not available in the Facility during the Reporting Period.

(1)(f) Traditional (TTY-Based) TRS: Select “Yes” from the drop-down menu if TTY-Based TRS was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if TTY-Based TRS was not available in the Facility during the Reporting Period.

(1)(g) Point-to-Point ASL Video Service: Select “Yes” from the drop-down menu if Point-to-Point Video Service was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if Point-to-Point Video Service was not available in the Facility during the Reporting Period.

(1)(h) TTY-to-TTY Calling: Select “Yes” from the drop-down menu if TTY-to-TTY Calling was available in the Facility during the Reporting Period. Select “No” from the drop-down menu if TTY-to-TTY Calling was not available in the Facility during the Reporting Period.

(2) Number of Disability Access Calls Completed: For each Facility served during the Reporting Period, report the number of completed communications made or received by Incarcerated People using each kind of Disability Access Service.

(2)(a) VRS: Enter the number of completed VRS communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(b) IP Relay: Enter the number of completed IP Relay communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(c) IP CTS: Enter the number of completed IP CTS communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(d) Non-IP CTS: Enter the number of Non-IP CTS communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(e) STS: Enter the number of STS communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(f) TTY-Based TRS: Enter the number of TTY-Based TRS communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(g) Point-to-Point ASL Video Service: Enter the number of Point-to-Point Video Service communications made or received by Incarcerated People in the Facility during the Reporting Period.

(2)(h) TTY-to-TTY Calling: Enter the number of TTY-to-TTY Calling communications made or received by Incarcerated People in the Facility during the Reporting Period.

(3) Number of Complaints Regarding Disability Access Services: For each Facility served during the Reporting Period, report the number of complaints that the Provider received regarding each kind of Disability Access Service.

(3)(a) VRS: Enter the number of complaints that the reporting Provider received regarding VRS at the Facility during the Reporting Period.

(3)(b) IP Relay: Enter the number of complaints that the reporting Provider received regarding IP Relay at the Facility during the Reporting Period.

(3)(c) IP CTS: Enter the number of complaints that the reporting Provider received regarding IP CTS at the Facility during the Reporting Period.

(3)(d) Non-IP CTS: Enter the number of complaints that the reporting Provider received regarding Non-IP CTS at the Facility during the Reporting Period.

(3)(e) STS: Enter the number of complaints that the reporting Provider received regarding STS at the Facility during the Reporting Period.

(3)(f) TTY-Based TRS: Enter the number of complaints that the reporting Provider received regarding TTY-Based TRS at the Facility during the Reporting Period.

(3)(g) Point-to-Point ASL Video Service: Enter the number of complaints that the reporting Provider received regarding Point-to-Point Video Service at the Facility during the Reporting Period.

(3)(h) TTY-to-TTY Calling: Enter the number of complaints that the reporting Provider received regarding TTY-to-TTY Calling at the Facility during the Reporting Period.

(4) Additional Information: In the Word template, provide any additional information needed to ensure that your entries for Disability Access are full and complete.

I. Alternate Pricing Plans

This section requires you to provide information regarding any Alternate Pricing Plans associated with Audio IPCS, Video IPCS, or both that you offered during the Reporting Period. For each question, provide as much information as necessary in the Word template to make your response complete and accurate.

(1) Alternate Pricing Plans and Options: In the Word template, using “Yes” or “No,” report whether you offered Alternate Pricing Plans in connection with your IPCS offerings during the Reporting Period. If you answer “Yes,” report whether these Alternate Pricing Plans were offered for Audio IPCS, Video IPCS, or both. Include pricing information, including whether the plans were offered by minutes, calls, or some other measure. Submit as a separate document any marketing or advertising documentation you provided to consumers in connection with these Alternate Pricing Plans. You should also include information about providing access to any Disability Access Service via Alternate Pricing Plans.

V. ANNUAL CERTIFICATION REQUIREMENTS

Each Provider must submit a signed Annual Certification Form in addition to the Annual Report. The Chief Executive Officer (CEO), Chief Financial Officer (CFO), or other senior executive of the Provider must complete the form and certify that, based on the executive’s own reasonable inquiry, all statements and information contained in the Provider’s Annual Report are true, accurate, and complete. A link to the Certification Form is provided in Appendix C to these Instructions.

(1) Name of Service Provider: Provide the name under which the Provider offers Audio IPCS or Video IPCS. If the Provider offers Audio IPCS or Video IPCS under more than one name, provide all relevant names.

(2) Reporting Year: Provide the relevant time period for the information the certification covers.

(3) Authorized Officer Name, Title: Provide the name and title of the authorized officer completing the certification form. The officer must be the CEO, CFO, or other senior executive who can attest to the truthfulness, accuracy, and completeness of the information provided.

(4) Mailing Address of Authorized Officer: Provide the business mailing address of the officer identified in item V.3.

(5) Telephone Number: Provide the business telephone number, with area code, of the officer identified in item V.3.

(6) E-mail Address: Provide the business e-mail address of the officer identified in item V.3.

(7) Certification: This item requires the officer who signs the certification form on behalf of the Provider to declare, under penalty of perjury, that (1) the signatory is an officer of the above-named Provider and is authorized to submit the attached Annual Report on behalf of the Provider; (2) the signatory has examined the attached Annual Report and determined that all requested information has been provided; and (3) based on information known to the signatory, or provided to the signatory by employees responsible for the information being submitted, and on the signatory's own reasonable inquiry, all statements and information contained in the Provider's Annual Report are true, accurate, and complete.

(8) Signature of Authorized Officer: The signature of the officer identified in item V.3 is required in this block.

(9) Date: The date the officer identified in item V.3 signs the form is required in this block.

(10) Printed Name of Authorized Officer: The printed name of the officer identified in item V.3 is required in this block.

APPENDIX A

The Word template is available at this link: <https://www.fcc.gov/document/annual-reports-word-template>

APPENDIX B

The Excel template is available at this link: <https://www.fcc.gov/document/annual-reports-excel-template>

APPENDIX C

The Annual Certification Form is available at this link: <https://www.fcc.gov/document/annual-report-certification-form>