

INSTRUCTIONS FOR ANNUAL REPORT FORM L

General Instructions for Form L **Annual Report for Local Exchange Carriers**

- A carrier certificated to provide ONLY local exchange service (LEC) or BOTH local exchange and interexchange service should submit Annual Report Form L. A carrier certificated to provide ONLY interexchange service (IXC) should submit Annual Report Form C.
- Separate reports must be submitted for each certificated entity.
- Only the completed Excel file may be submitted to the OPUC via [email](#) (or via electronic media if concerned about confidentiality) by 5:00 p.m. Pacific Time on April 1, 2024 (OAR 860-032-0060).
- Failure to submit a completed Excel file may result in loss of the Certificate of Authority (OAR 860-032-0015). "Not available" and substitutions are not acceptable. PDF files or paper copies will not be accepted.
- Parts A-D will be treated as public record unless a written request for an exemption to release specific documents as provided by the Public Records Law is sent to and approved by the OPUC. The OPUC will publish the remaining data only on an aggregated basis and treat information about individual respondents as exempt from public disclosure (confidential). Access to confidential information is limited under ORS Chapter 192.

Excel Version of Form L Annual Report

- The Excel file is available at the OPUC's [website](#).
- The worksheets contain formulas when sums are required. Do not change formulas.
- Check each appropriate box (☐).
- The Excel file is formatted for pdf printing on 8.5 x 11 pages. The print to paper setup may differ; change as needed for local purposes.

SECTION A

- Provide the exact legal name. Use the word "The," "Company," "Co.," or "Inc." only when it is part of the legal corporate name. Include mailing addresses, assumed business names, former business names and affiliated Oregon operations.
- Identify the docket in which the OPUC granted LEC a Certificate of Authority. If necessary, LEC may obtain its docket number in the eDockets section of the OPUC's website.
- Provide LEC's OPUC Identification Number. If necessary, LEC may obtain its identification number in the eDockets section of the OPUC's website.
- Provide LEC's FCC FRN number.
- Provide the name, title, mailing address, telephone number, and email address for LEC regulatory contact.
- Provide the name, title, mailing address, telephone number, and email address for Preparer (person responsible for the data entries).
- Provide the names of any telecommunications Affiliates operating in Oregon. See *Definitions*.

SECTION B

Provide the name and title of the responsible LEC Officer or Director authorizing the submission of the LEC Form L.

SECTION C

- Provide emergency and safety contact information.
- LEC Oregon Utility Notification Center (OUNC) District Code Numbers should end with two digits (e.g., QWEST99).
- If LEC has more than one OUNC code, provide the primary contact's identification.
- For information about LEC OUNC codes, contact OUNC's One-Call Center Administrative Information Number in Portland, Oregon, at 503-232-1987.

SECTION D

Check the appropriate boxes and provide additional information, as requested.

SECTION E

Section E data is not required if LEC checked Box 10 in Section D; however, LEC must still complete Section J (Business Plans and Competition). All other LECs must provide the total Oregon annual gross revenues at year end and, if available, the split between intrastate and interstate.

SECTION F

Section F data is required if LEC checked Box 1 in Section D.

Apart from customer numbers and the regional split of lines, all other information should be the same as input on FCC Form 477.

Section F1a. Please provide the number of Local Exchange Telephone Customers at the year end.

Section F1b. Please provide the number of Local Exchange Telephone Lines the LEC:

- Sells direct to end users;
- Sells to an unaffiliated carrier for them to resell under a resale agreement;
- Sells to an unaffiliated carrier under a UNE agreement;
- Sells to an unaffiliated carrier under a UNE P agreement.

Section F1c. Please provide more details of the lines the LEC sells direct to end users.

- Percentage of these lines that are residential;
- Percentage of these lines that are provided to the LEC's end users by using its own local loop facilities (Line 3);
- Percentage of these lines that are provided to LEC's end users by using UNEs obtained from an unaffiliated carrier (Line 4);
- Percentage of these lines that are provided to the LEC's end users by using lines obtained from an unaffiliated carrier under a resale agreement (Line 5);
- Note: sum of lines 3, 4 & 5 should be 100%;
- Percentage of these lines provided to the LEC's end users by using optical fiber (Line 6);
- Percentage of these lines provided to the LEC's end users by using coaxial cable (Line 7);

- Percentage of these lines provided to the LEC's end users by using fixed wireless (Line 8);
- Note: sum of lines 6, 7 & 8 will not add to 100% (remainder should be the number of copper lines).

Section F2. Please provide the regional split of both residential and business lines the LEC sells direct to end users.

SECTION G

Section G data is required if LEC checked Box 2 in Section D.

Apart from customer numbers and the regional split of subscriptions, all other information should be the same as input on FCC Form 477.

Section G1a. Please provide the number of Interconnected VoIP customers at the year end.

Section G1b. Please provide the number of Interconnected VoIP Lines the LEC:

- Sells direct to end users with a broadband connection, and the percentage of these that are residential.
- Sells direct to end users without a broadband connection, and the percentage of these that are residential.

Section G2. Please provide the regional split of both residential and business lines the LEC sells direct to end users with and without a broadband connection.

SECTION H

Section H data is required if LEC checked Box 3 in Section D.

Section H1. Please provide the number of special access or private line customers at the year end, the number of circuits split in both the Lower and Higher capacity categories, and the associated revenues.

SECTION I

Section I data is required if LEC checked Box 4 in Section D.

Section I1. Please provide the number of xDSL or Other Broadband Service lines provided to end user customers at the year end.

Section I2. Please provide the regional split of xDSL or Other Broadband Service lines provided to end user customers at the year end.

SECTION J

Section J data is required by all LEC's.

OPUC Contacts

Form C: [Kathy Shepherd](#), 971-375-5103

Form L: [Nicola Peterson](#), 503-586-9531

[OPUC website](#)

DEFINITIONS

Access service – see non-switched, special, and switched.

Access line – a telecommunications loop, channel or facility extending from a customer premises to a serving central office.
Included: lines that are revenue producing for the company; residential and business analog or digital lines that access the public switched network; DS0, DS1, and DS3 digital access lines. (DS0 is the equivalent of one 64 Kbps digital line; DS1 equals 24 DS0 lines; and DS3 equals 672 DS0 lines.)

Active telephone numbers served – Telephone numbers beginning with area codes 458, 503, 541, or 971, which are dial-tone ready and available to originate or terminate calls by or from end-users or end-user devices.

Affiliates – companies or entities directly or indirectly under common ownership or control. For specifics see ORS 759.390.

Annual revenues – see *revenues*.

Business customer – see *customer*.

Capacity – is determined by the highest data transmission rate in either direction. **Lower capacity** is defined as less than 1.544 Mbps and includes lower range xDSL services. **Higher capacity** is defined as 1.544 Mbps or higher and includes higher range xDSL, T-1, DS-1, T-3 and DS-3.

Carrier – a carrier may be a competitive provider (CP), competitive local exchange carrier (CLEC), incumbent local exchange carrier (ILEC), interexchange carrier (IXC), shared service provider, reseller, telecommunications utility, telecommunications cooperative, or telecommunications association.

Carrier of Last Resort – a telecommunications company that commits (or is required by law) to provide services to customers within designated service areas as certificated by the OPUC.

Circuit – a special access or private connection. A circuit is a discrete path between two or more terminations. The capacity of a circuit should be determined by the capacity delivered to the customer at the point of termination, even though the customer may further subdivide that capacity using its own multiplexing or other equipment.

Competitive local exchange carrier (CLEC) – a non-ILEC provider of local exchange services certificated by the OPUC.

Competitive provider – A CLEC or IXC certificated by the OPUC.

Cooperative – a cooperative corporation or association, which provides local exchange telecommunications service within designated exchanges and certificated as an ILEC by the OPUC.

Customer – a person or entity that was receiving service for a price during the period covered by this report. A single customer can have multiple lines.

Business customer means a retail customer whose use of a service is for conducting a business, trade, or profession.

Oregon customer means a person or entity receiving services within Oregon.

Residential customer means a retail customer whose use of a service is for domestic purposes at a residence or dwelling.

Retail customer (end user) means any customer other than a wholesale customer, including an Internet service provider or payphone owner.

Wholesale customer (carrier) means a telecommunications provider that has a Certificate of Authority from the OPUC, is a radio common carrier (commercial mobile radio licensee), or is registered with the FCC as a telecom provider. Wholesale customers may provide service to their customers through resale, special access, and other interconnections.

Directory assistance service – the provision of information about telephone numbers upon request.

End user – a retail customer.

Exchange – a local calling area.

Fixed Wireless – a local exchange architecture which replaces part of the local loop and transport between the end-user devices and the end-office with wireless technology.

Gross revenues – the total cash inflows or equivalents from LEC operations as accrued or billed before uncollectibles (bad debts), agent's commissions, access charges paid, and other billing and collection costs.

Incumbent local exchange carrier (ILEC) – a telecommunications utility or cooperative with a certificate of authority issued by the OPUC to provide carrier of last resort services within assigned areas: *Asotin Telephone Company; Beaver Creek Cooperative Telephone Company; Canby Telephone Association; Cascade Utilities; CenturyLink; Clear Creek Mutual Telephone Company; Colton Telephone Company; Eagle Telephone System, Inc.; Gervais Telephone Company; Helix Telephone Company; Home Telephone Company; Molalla Telephone Company; Monitor Cooperative Telephone Company; Monroe Telephone Company; Nehalem Telecommunications Inc.; North-State Telephone Company; Oregon Telephone Corporation; Oregon-Idaho Utilities, Inc.; Peoples Telephone Company; Pine Telephone System, Inc.; Pioneer Telephone Cooperative; Roome Telecommunications, Inc.; Scio Mutual Telephone Company; St. Paul Cooperative Telephone Association; Stayton Cooperative Telephone Company, Inc.; Trans-Cascades Telephone Company; Zippy Fiber Northwest LLC; and Zippy Fiber of Oregon LLC.*

Interexchange carrier (IXC) – a telecommunications provider that is authorized to provide long distance services between exchanges.

Interexchange private line service – the provision of dedicated circuits, which a customer uses to connect two or more pre-selected locations in different local exchanges. See *private line service*.

Interoffice transport facility – a circuit connecting switching centers.

Interstate call – a call that originates or terminates in Oregon with at least one party outside of Oregon.

Intrastate call – a call that originates and terminates within Oregon.

Intrastate interexchange private line service – circuits that originate and terminate within Oregon but cross one or more exchange boundaries. See *private line service*.

Lines – see *access line* and *local exchange line*.

Local calling area – ILEC and CLEC geographic service areas approved by the OPUC for non-toll, end-user calling. Local calling areas may have extended area service, as approved by the OPUC.

Local exchange carrier (LEC) – an ILEC or CLEC.

Local exchange line – a voice level transmission path (that links an end user (retail customer) location with the switching center that provides dial tone. Also, see *access line*.

Local exchange private line service – the provision of dedicated circuits, which a customer uses to connect two or more pre-selected locations within a local exchange. See *private line service*.

Local exchange switched service – the provision of dial-up connections, and associated features-functions, between locations that are within a local calling area, such as basic local service, extended area service, and central office features.

Long distance service – synonymous with toll, calls between or among local calling areas whether intrastate, interstate or international.

Long distance (toll) minutes – the duration of time between the called station answering and the called or calling station disconnecting.

Loop – a facility or equipment that connects end users (retail customers) with a switching center.

NESC – National Electrical Safety Code.

Non-switched access – carried by dedicated special access and private lines.

Oregon revenues – see *revenues*.

Operator service – the provision of special billing, dialing assistance, and information regarding the use of and charges for telecommunications services upon request. Operator service may be manual or automatic.

Oregon Administrative Rule (OAR) – Copies of the administrative rules are available at the OPUC's website under Other Useful Links.

Oregon customer – see *customer*.

Oregon Revised Statute (ORS) – Copies of Oregon's laws are available at the OPUC's website under Other Useful Links.

OUNC – Oregon Utility Notification Center. OUNC is the Oregon state agency that administers Oregon's excavation laws and the statewide toll free "One-Call" number: 1-800-332-2344 (2DIG). More information about OUNC is available at their [website](#).

Private line circuit – see *circuit*.

Private line service – the provision of dedicated circuits, whether physical or virtual, which a customer uses to connect two or more pre-selected locations. Circuits may be hard-wired or use frame-packet-cells or other switching-routing technologies to establish connections. Service may be local exchange or interexchange and includes xDSL. For the definitions of lower capacity and higher capacity xDSL, see *capacity*.

Retail customer – see *customer*.

Retail service – a service provided to a retail customer.

Revenues – the cash inflows or equivalents from operations during the year.

Exclude loan proceeds, shareholder contributions, and taxes billed to customers.

Include regulated and nonregulated charges; federal and state charges; federal and Oregon universal service distributions; charges for switched lines, local usage, extended area service, repair and maintenance services, directory listing services, and add-on features such as call waiting, voice messaging, and caller identification; and charges for private line circuits and add-on capabilities such as multiplexing, conditioning, and bridging.

Annual revenues mean the gross amount billed for services for the calendar year included in this report.

Billed revenues mean the gross amount billed for services, whether billed in advance or arrears.

Gross revenues mean the total cash inflows or equivalents from LEC operations as accrued or billed before uncollectibles (bad debts), agent's commissions, access charges paid, and other billing and collection costs.

Oregon Intrastate revenues mean gross revenues from calls or services that originate and terminate in Oregon. Intrastate includes state and federal surcharges from and distributions for end users in Oregon.

Total Oregon revenues mean the gross revenues from Oregon customers, including international, interstate, and intrastate revenues from calls that originate and/or terminate in Oregon.

Special access – carried by dedicated facilities, such as private lines.

Switched access – access switched to or from end offices.

Switched access lines – dial tone ready end office lines serving residence or business users. Private lines such as DS1 and DS3 may be used for switched access services, most often for large business users. Access lines should be reported in DS0 equivalents. Each DS1 equals 24 DS0 lines; each DS3 equals 672 DS0 lines.

Telecommunications provider – a provider of telephone and similar services. This term includes ILECs, CLECs, Long Distance Providers and Wireless Service Companies.

Toll – synonymous with long distance. Calls between or among local calling areas whether intrastate, interstate or international.

Unbundled network element (UNE) – a facility or equipment used in the provision of telecommunications service, including but not limited to features, functions, and capabilities that are provided by means of such facility or equipment, such as a local loop (Code of Federal Regulations §51.5).

Utility – an incumbent telecommunications provider other than a cooperative. See ORS 759.005(1) for the definition of a telecommunications utility.

VoIP – Voice over Internet Protocol is a technology that allows end users to make telephone calls using a broadband connection instead of an analog phone line. VoIP calls may also use internet to complete calls.

VoIP Lines – access lines served with VoIP technology. See *VoIP*.

Wholesale customer – see *customer*.

Wholesale service – a sale to another telecommunications provider (carrier), whether at discounted or full retail rates, so the other provider can provide service to end users. Wholesale may include, but is not limited to, sales for resale to a competitive provider, interexchange carrier, telecommunications cooperative, or telecommunications utility; special access; and other interconnections. Wholesale does not include sales to Internet service providers.

xDSL – refers collectively to all types of Digital Subscriber Loops, such as ADSL or HDSL, from the lowest capacity to the highest capacity.

EXCHANGES – Zip Codes

Oregon's exchanges are divided into the six geographic regions below. A list of exchanges by ILECs is available at the OPUC's [website](#). LECs needing corresponding zip code information to map their service areas into exchanges and regions should notify the OPUC Form L contact. Regions, Exchanges, and Zip Codes are available in Excel files upon request.

Central – Antelope, Arlington, Bend, Bly, Bonanza, Camp Sherman, Cascade Locks, Chemult, Chiloquin, Condon, Culver, Dufur, Fossil, Gilchrist, Grass Valley, Hood River, Klamath, Klamath Falls, Lakeview, LaPine, Madras, Malin, Maupin, Merrill, Mitchell, Moro, Mosier, Odell, Paisley, Parkdale, Paulina, Pine Grove, Prineville, Redmond, Rocky Point, Rufus, Silver Lake, Sisters, Sprague River, The Dalles, Thorn A, Thorn B, Three Rivers, Tygh Valley, Wamic, Wasco.

Coast – Ash Valley, Astoria, Bandon, Bay City, Beaver, Brookings, Cannon Beach, Chitwood, Cloverdale, Coos Bay North Bend, Coquille, Depoe Bay, Florence, Garibaldi, Gleneden, Gold Beach, Jewell, Knappa, Lakeside, Langlois, Lincoln City, Mapleton, Myrtle Point, Nehalem, Newport, Pacific City, Port Orford, Powers, Reedsport, Rockaway, Scottsburg, Seaside, Siletz, South Beach, Tidewater, Tillamook, Toledo, Waldport, Warrenton, Westport, Yachats.

East – Adrian, Athena Weston, Baker City, Boardman, Burns, Cove, Dayville, Durkee, Echo, Elgin, Enterprise, Flora Troy, Granite A, Granite B, Haines, Halfway A, Halfway B, Harper, Helix, Heppner, Hereford Unity, Hermiston, Huntington, Imbler, Lone, John Day, Jordan Valley, Joseph, Juntura, La Grande, Lexington, Long Creek, Lostine, Meacham, Medical Springs, Milton Freewater, Monument, Mt Vernon, North Harney, North Powder, Nyssa, Ontario, Oregon Slope, Pendleton, Pilot Rock, Prairie City A, Prairie City B, Quinn, Richland, Ridgeview, Seneca, South Harney, Spray, Stanfield, Starkey, Sumpter, Ukiah, Umatilla, Union, Vale, Walla Walla, Wallowa.

Portland Metropolitan – Aurora, Beaver Creek, Beaverton, Burlington, Canby, Carlton, Charbonneau, Clatskanie, Clear Creek, Colton, Corbett, Estacada A, Estacada B, Forest Grove, Government Camp, Gresham, Hillsboro, Hoodland, Lake Oswego, Molalla, Newberg, North Plains, Oak Grove Milwaukie, Oregon City, Portland, Rainier, Saint Helens, Sandy, Scappoose, Scholls, Sherwood, Stafford, Sunnyside, Tigard, Vernonia, Woodburn, Yamhill.

Southwest Interior – Ashland, Azalea, Butte Falls, Camas Valley, Canyonville, Cave Junction, Central Point, Crater Lake, Days Creek, Diamond Lake, Elkton, Fish Lake, Glendale, Glide, Gold Hill, Grants Pass, Jacksonville, Medford, Murphy Provolt, Myrtle Creek, North Umpqua, Oakland Sutherlin, OBrien, Phoenix Talent, Prospect, Riddle, Roseburg, Rouge River, Selma, Shady Cove, White City, Wolf Creek, Yoncalla.

Willamette Valley – Albany, Alsea, Amity, Aumsville Turner, Bellfountain, Blodgett, Blue River, Brownsville, Corvallis, Cottage Grove, Creswell, Dallas, Dayton, Detroit, Drain, Eugene Springfield, Falls City, Gervais, Grand Island, Grand Rhonde, Halsey, Harlan, Harrisburg, Horton, Independence, Jefferson, Junction City, Leaburg, Lebanon, Lobster Valley, Lowell, Lyons, Marcola, McMinnville, Mill City, Monitor, Monroe, Mt Angel, Needy, Oakridge, Philomath, Salem, Scio, Shedd, Sheridan, Silverton, St Paul, Stayton, Summit, Sweet Home, Triangle Lake, Veneta, Willamina