

NLAD and E-File

What does E-File have to do with NLAD?

Housekeeping

- Use the “Audio” section of your control panel to select an audio source and connect to sound.
 - Turn on your computer’s speaker, or
 - Use the call-in instructions in your confirmation email.
- All participants are on mute.
- Submit questions at any time using the “Questions” box.
- Where to find presentation slides.

Today's Speakers

- **Jean Yeung**
Manager of Lifeline Program
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Supervisor of Customer Operations

NLAD and E-File

What does E-File have to do with NLAD?

Getting access to NLAD starts with E-File.

- **Step One:** Your company's 498 Officer must log in to E-File and either:
 - Certify themselves as the 497 Officer, OR
 - Select another member of the company and assign a 497 Officer entitlement to them.
 - We will show you how to do this.

Getting access to NLAD starts with E-File.

- **Step Two:** That 497 Officer can then (and only then) log in to NLAD. Once they are logged in to NLAD, they can create NLAD authorized users.
- **Remember:** You can't log in to NLAD to set up accounts unless you have a certified (or authorized) 497 Officer entitlement in E-File.

NLAD and E-File

**I'm not sure if I'm
a 498 Officer.**

What is a 498 Officer?

- The FCC Form 498 is the Service Provider Identification Number and General Contact Information Form.
 - Generates your company's SPIN.
 - Enables company to participate in universal service programs.
- Every company has one designated FCC Form 498 Officer.
- This person is listed in Block 18 of the FCC Form 498.

How do I check to see if I am the 498 Officer?

Log in to E-File, and click on “My Account” from the left-hand menu. If you see “Form 498 Officer” listed under “Entitlements” as shown here, then you are the 498 Officer.

The screenshot displays the USAC E-File interface. On the left, the 'Information Center' menu includes options like '+ Service Providers', '+ Schools and Libraries', '+ Rural Health Care', '+ High Cost & Low Income', '+ Pending Certifications', '- Download Forms', '+ Authorized Users' (highlighted with a red box), '- My Account', '- Change Password', '+ FAQs', and '- Terms and Conditions'. On the right, the 'My Account' section is visible, with a sub-section 'My Account' highlighted in blue. Below this, the 'Entitlements' section is highlighted with a red box and lists two entries: 'Form 498 Officer - [redacted]' and 'Form 498 Officer - [redacted]'. Other fields like Name, Email ID, Street Address, City, State, Zip, Contact Phone, and Contact Fax are also visible but not highlighted.

How do I check to see if I am the 498 Officer?

- If you do not know whether you are your company's 498 Officer and you have never logged in to E-File before, call USAC Customer Operations at (888) 641-8722.
- Ask the Customer Operations team who the 498 Officer is for your company. You will need to contact that person to proceed.
- Be sure to have your SPIN handy when you call.

Questions?

NLAD and E-File

Certify My 497 Officer Entitlement

Certify 497 Officer Entitlements

498 Officer Does Not Have Immediate Access to NLAD

- If you are a 498 Officer, first certify yourself as a 497 Officer.
- Just because you are a 498 Officer does not mean that you have access to NLAD.
- 498 Officers already have an entitlement as a 497 Officer, but you must certify that entitlement to access NLAD.

Certifying Your 497 Officer Entitlement

- If you know that you are a 498 Officer, the following steps will show you how to certify your 497 Officer entitlement so that you can access NLAD.
- If you want someone else in your company to be able to assign NLAD users, you will need to authorize them with a 497 Officer entitlement. We'll show you how to do that next.
- Either way, assigning or certifying the entitlement must be done in E-File.

Certify 497 Officer Entitlements

STEP 1: Log in to E-File using your 498 Officer credentials.

E-File Sign In

User ID:

Password:

[Forgot password](#)


Click the box to accept.

New users, please select from the options below:

- [New Service Provider](#)
- [New Contributor/Registration In Progress](#)
- [New RHC Applicant](#)

Certify 497 Officer Entitlements

STEP 2: Select “497 form” from the left hand menu.



The screenshot shows the USAC Information Center interface. On the left is a vertical menu with various options. The option '- 497 Form / 555 Form' is highlighted with a red box. The main content area on the right is titled 'Information Center' and contains several sections: 'Service Providers', 'Schools & Libraries', 'Rural Health Care', 'High Cost & Low Income', and 'Authorized Users'. Each section has a table with columns for 'Form 498 SPIN', 'Company Name', and 'Tax ID'. The 'Authorized Users' section has columns for 'Email' and 'Full Name'.

Service Providers		
Form 498 SPIN	Company Name	Tax ID
[Redacted]	[Redacted]	[Redacted]

Schools & Libraries		
Form 498 SPIN	Company Name	Tax ID
143034270	New Dimension Communications, ...	37102934...

Rural Health Care		
Form 498 SPIN	Company Name	Tax ID
143034270	New Dimension Communications, ...	37102934...

High Cost & Low Income		
Form 498 SPIN	Company Name	Tax ID
[Redacted]	[Redacted]	[Redacted]

Authorized Users	
Email	Full Name
user497@497.com	David johnson

Certify 497 Officer Entitlements

STEP 3: Select “Form 497 Officer” and click “OK” to confirm.

The screenshot shows a web application interface with a sidebar on the left containing menu items: '+ High Cost & Low Income', '- Download Forms', '+ Authorized Users', '+ My Account', '+ FAQs', and '- Terms and Conditions'. The main content area displays a modal dialog box with the following text:

To access the Low Income system you must confirm that you are an Officer of this company. You must be an officer to certify the Form 497

Form 497 Officer

Form 497 User

OK Cancel

For a user with multiple SPINs this process can take up to an hour. Please be patient. Clicking OK will allow you to continue working in E-File or even log out of E-file while the entitlements update.

Certify 497 Officer Entitlements

Test it

- You should now be able to use your E-File credentials (user name and password) to log in to NLAD.
- NLAD URL: <https://NLAD.universalservice.org>

NLAD and E-File

Assign a 497 Officer Entitlement

The 498 Officer can assign other 497 Officers.

- In addition to certifying themselves as 497 Officers, the 498 Officer can assign other 497 Officers.
 - Only 497 Officers can assign additional users to NLAD.
- Do not authorize people as 497 Officers unless you are comfortable with them having full 497 Officer permissions and capabilities.

E-File via the Lifeline Program website

The screenshot shows the USAC Lifeline Program website. At the top right, there are links for Contributors, Service Providers, Subscribe, and Contact Us. The USAC logo is on the left. A search bar with a 'GO' button is on the right. A dark red navigation bar contains the following links: E-FILE, MAKING PAYMENTS, FORMS, and TOOLS. The 'E-FILE' link is circled in blue. Below the navigation bar, there are two main content areas. The left area is titled 'ABOUT THE PROGRAM' and lists: Getting Started, Program Integrity, Annual Recertification, Trainings & Outreach, Reference Area, and Broadband Pilot Program. Below this is 'RESOURCES & TOOLS' with a list: FORMS, E-File, NLAD, and Latest News. The 'E-File' link is circled in blue. The right area has two columns. The first is 'GETTING LIFELINE' with a dropdown arrow, a photo of a house, and the text 'Learn how to sign up for the Lifeline Program in your state.' with a 'GET STARTED >>' button. The second is 'TELECOM CARRIERS' with a dropdown arrow, a photo of a house, and the text 'Steps to funding for eligible telecommunications carriers' with a 'GET STARTED >>' button. At the bottom, there are 'LATEST NEWS' and 'QUICK LINKS' sections, each with a 'More News >>' or 'More Links >>' button.

Assign 497 Officer Entitlement

STEP 1: Log in to E-File using your 498 Officer credentials.

E-File Sign In

User ID:

Password:

[Forgot password](#)

IMPORTANT SYSTEM NOTICE - This system is the property of the Universal Service Administrative Company (USAC) and is to be used to assist individuals with managing their entity's involvement in federal universal service programs. This system may be accessed by authorized users only. By logging in, the user represents himself or herself as an authorized user. This system is monitored, recorded and subject to audit. Any unauthorized use or misuse of this system is strictly prohibited and subject to legal action, including criminal prosecution and civil penalties. Use of this system indicates acceptance of these terms and system monitoring and recording.

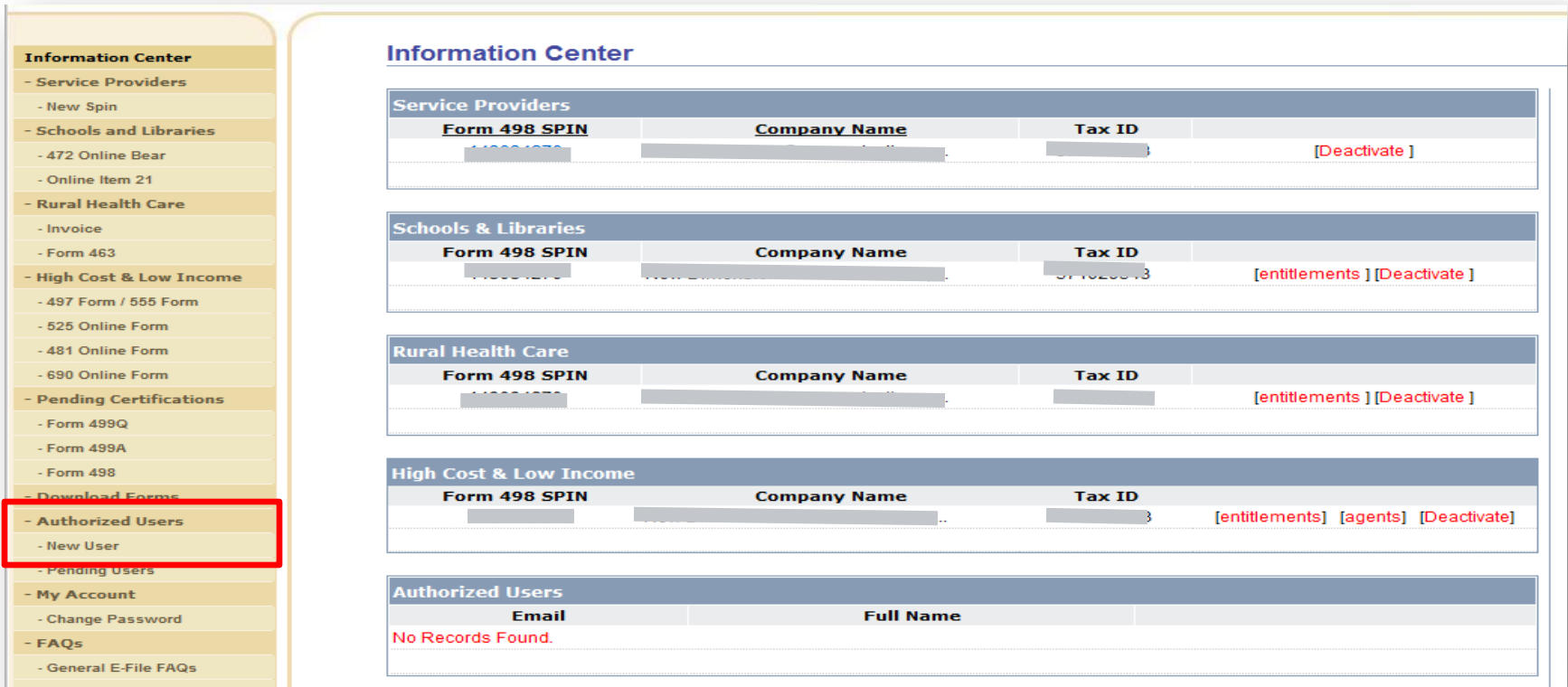
Click the box to accept.

New users, please select from the options below:

- [New Service Provider](#)
- [New Contributor/Registration In Progress](#)
- [New RHC Applicant](#)

Assign 497 Officer Entitlement

STEP 2: Select “New User” from the left hand menu in the “Authorized Users” section.



Information Center

- Service Providers
 - New Spin
- Schools and Libraries
 - 472 Online Bear
 - Online Item 21
- Rural Health Care
 - Invoice
 - Form 463
- High Cost & Low Income
 - 497 Form / 555 Form
 - 525 Online Form
 - 481 Online Form
 - 690 Online Form
- Pending Certifications
 - Form 499Q
 - Form 499A
 - Form 498
- Download Forms
- **Authorized Users**
 - New User
 - Pending Users
- My Account
 - Change Password
- FAQs
 - General E-File FAQs
 - E-Certification FAQs

Information Center

Service Providers

Form 498 SPIN	Company Name	Tax ID	
[REDACTED]	[REDACTED]	[REDACTED]	[Deactivate]

Schools & Libraries

Form 498 SPIN	Company Name	Tax ID	
[REDACTED]	[REDACTED]	571028873	[entitlements] [Deactivate]

Rural Health Care

Form 498 SPIN	Company Name	Tax ID	
[REDACTED]	[REDACTED]	[REDACTED]	[entitlements] [Deactivate]

High Cost & Low Income

Form 498 SPIN	Company Name	Tax ID	
[REDACTED]	[REDACTED]	[REDACTED]	[entitlements] [agents] [Deactivate]

Authorized Users

Email	Full Name
No Records Found.	

Assign 497 Officer Entitlement

STEP 3: Enter the email address of the user you want to create, and click “Search.”

User Management - Assign New User User: Connie White
[My Account](#) | [Log Out](#)

Please enter the email address of the user you wish to add. If that user already exists, the existing user profile information will be displayed on the next screen. If the user does not exist, you will be prompted to create the user. Please note that the user's logon id for E-File will be his or her email address.

Email:

Assign 497 Officer Entitlement

STEP 4: Enter the user's first and last name (these are the only required fields) and click the "Next" button.

User Management - Assign New User User: Connie White
[My Account](#) | [Log Out](#)

Please enter the email address of the user you wish to add. If that user already exists, the existing user profile information will be displayed on the next screen. If the user does not exist, you will be prompted to create the user. Please note that the user's logon id for E-File will be his or her email address.

Email:

'user497@497.com' is a new user. Please fill out the below.

First Name:	<input type="text" value="David"/>
Middle Initial	<input type="text"/>
Last Name:	<input type="text" value="johnson"/>
Street Address Line 1:	<input type="text"/>
Street Address Line 2:	<input type="text"/>
Street Address Line 3:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>

Please hit Next to assign entitlements...

Field names in bold are required.

Assign 497 Officer Entitlement

STEP 5: Under the “LI Form 497” checkbox, check the box for the appropriate SPIN and select the type of user you would like to create from the dropdown menu (must be a 497 Officer for the purposes of NLAD).

Please ensure you add at least one entitlement above to this user. In order to successfully create a user they must have at least one entitlement you have added an entitlement the “save button” will be available.

User Email: user497@497.com

Full Name: David johnson

<input type="checkbox"/> Filer ID	<input type="checkbox"/> SLD Form 472	<input type="checkbox"/> RHC Invoice	<input type="checkbox"/> LI Form 497	<input type="checkbox"/> Form 525	<input type="checkbox"/> Form 481	<input type="checkbox"/> Form 690
			14303	1	70	
			Not Selected	Not Selected	Not Selected	Not Se
			497 User			
			497 Officer			

Save

Assign 497 Officer Entitlement

You're done! The next screen should provide a confirmation message that the authorization is complete.

The screenshot displays a web application interface. On the left is a vertical navigation menu with the following items: Information Center, Service Providers, Schools and Libraries, High Cost & Low Income, Download Forms, Authorized Users, My Account, and FAQs. The main content area is titled 'Assign New User' and contains a confirmation message: 'abcd@bcd.com has been successfully added as your authorized user.'

Test it

- The newly-created 497 Officer will receive an email with their E-File credentials (user name and password).
- These credentials can be used to log into NLAD.
 - NLAD URL: <https://NLAD.universalservice.org>

NLAD and E-File

Review

Getting access to NLAD starts with E-File.

- **Step One:** Your company's 498 Officer must log in to E-File and certify themselves as the 497 Officer, or select another member of the company and assign a 497 Officer entitlement to them.
- **Step Two:** That 497 Officer can then (and only then) log in to NLAD. Once they are logged in to NLAD, they can create NLAD authorized users.
- **Remember:** You can't log in to NLAD to set up accounts unless you have a certified (or authorized) 497 Officer entitlement in E-File.

Questions?

Thank you for joining us at today's webinar!

Questions about NLAD

- (877) 524-1325
- NLADsupport@usac.org
- Subscribe to:
 - HCLI News quarterly newsletter
 - NLAD Bulletin

Questions about E-File

- (888) 641-6722
- Customersupport@usac.org
- Subscribe to 498/499 Spotlight quarterly newsletter

