

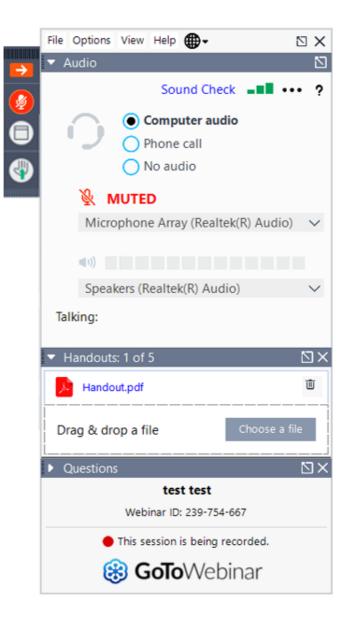
## **March 2024 Monthly Webinar**

National Lifeline Accountability Database (NLAD) 101 for Beginner Users



## Housekeeping

- Audio is available through your computer's speakers.
- The audience will remain on mute.
- Enter questions at any time using the "Questions" box.
- If your audio or slides freeze, restart the webinar.
- A copy of the slide deck is in the "Handouts" section of the webinar panel.



### **Disclaimer**

To accommodate all attendees, real-time closed captions will be present during this presentation. We apologize in advance for any transcription errors or distractions. Thank you for your support!

### **Meet Our Team**



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## **Agenda**

- Announcements
- Lifeline Program Overview
- National Lifeline Accountability Database (NLAD) Overview
- Enrolling a Subscriber: Portal, Batch, & NLAD API
- Resources

## **Objectives**

## At the end of the session, you will...



#### ...be able to:

- Enroll a subscriber in the NLAD.
- Understand the role and responsibility of service providers when using the NLAD system.



#### ...understand how to:

Navigate the NLAD system.

## 2024 Recertification - Ongoing

- Recertification is an annual requirement for Lifeline subscribers. USAC conducts recertification to ensure that active Lifeline subscribers are still eligible to receive the Lifeline benefit.
- USAC has initiated this automated eligibility process for subscribers due for recertification in 2024.
  - Subscribers who pass the automated check will not need to take any further action.
  - Subscribers who fail the automated check will be required to recertify their continued eligibility. USAC will conduct outreach to those subscribers.
- Subscribers will have an approximately 60-day window to recertify and can complete the process online or through the mail.
- To learn more about the recertification process, visit the <u>Recertification</u> webpage.

## Reverification Resumed for Group Two

- <u>Reverification</u> is a one-time process to confirm that all subscribers enrolled in the Lifeline program through legacy processes (i.e., pre-National Verifier processes) meet the National Verifier's eligibility standards.
- On March 6, 2024, USAC resumed reverification for subscribers in Group Two which include: Puerto Rico, California (broadband only), Florida, Illinois, Minnesota, Ohio, and Wisconsin.
- Service providers have 60 days to view the Reverification Subscriber Status
  Report in NLAD, review any failures, and gather existing on-hand documentation
  to resolve the failure(s).

Reverification: Document Submission

• Existing on-hand documentation will be accepted to resolve address, duplicate address, or identity failures. All on-hand documentation is due between March 6 and May 5, 2024.

**Note:** Proof of life and eligibility documents must be current and valid. Service providers are not expected to have these documents on hand. USAC will perform outreach to consumers if these documents are needed.

#### Reverification: New Electronic Submission Process

- To streamline the documentation submission process, USAC released an online submission option on March 6, 2024.
- Guidance regarding the <u>online submission process</u> is available for reference on the Reverification webpage.
- Service providers still have the option to mail in documents.

## Lifeline Program Overview

## **Lifeline Program Overview**

The Lifeline program is a benefit program that helps low-income households pay for phone or internet service.

Eligible households can receive:

#### \$9.25 Standard Discount

Up to \$9.25/month discount for internet or bundled services and up to \$5.25/month for phone service that meets the minimum service standards.

#### \$34.25 Tribal Discount

Up to \$34.25/month discount for households on <u>qualifying Tribal</u> lands.

#### \$100 Link Up Discount

A one-time discount of up to \$100 off the initial set up fees at addresses on qualifying Tribal lands.

The Lifeline benefit is limited to one monthly service discount per household.

## **Lifeline Program**

## How to Qualify

There are **three ways** a household can qualify for the Lifeline program:

- Household income is at or below 135% of the federal poverty guidelines.
- Participation in <u>certain federal assistance programs</u> such as SNAP, Medicaid, Supplemental Security Income (SSI), federal housing assistance, or Veterans Pension and Survivors Benefit.
- Participation in certain <u>Tribal assistance programs</u> (only available to households that live on Tribal lands) such as Bureau of Indian Affairs General Assistance, Head Start, Tribal Temporary Assistance for Needy Families (Tribal TANF), or Food Distribution Program on Indian Reservations.

## **Lifeline Program**

## How to Apply

#### **Option 1:** Apply Online

- The consumer visits

  <u>LifelineSupport.org</u> from any computer or mobile device to complete the online application and upload any required documentation.
- If approved, the consumer contacts a participating service provider to enroll in Lifeline.

#### Option 2: Apply by Mail

- The consumer fills out and signs the <u>Lifeline Application</u> <u>Form (Spanish)</u>.
- The consumer mails the application and supporting documentation to the Lifeline Support Center.
- Service providers may assist consumers with the paper application and mail it on the consumer's behalf.

#### **Option 3:** Apply with a Service Provider

- Service providers may submit an online application on the consumer's behalf (only with the consumer's consent) using the <u>National Verifier service provider portal</u>.
  - This is an in-person interaction, where the service provider asks the consumer questions in an interview style approach.
  - The consumer must sign and certify the application.
- Consumers may also apply through the service provider's website, if the provider has elected to use the <u>National Verifier API</u>.

## **Overview of Lifeline Systems**

Representative
Accountability Database
(RAD)

**Validates the identities of service provider representatives** performing transactions in NLAD and the National Verifier.

**National Verifier** 

Lifeline's application system to **determine a consumer's eligibility** for Lifeline.

National Lifeline
Accountability Database
(NLAD)

System that service providers use to **enroll consumers in the program** and **manage their Lifeline subscribers**.

Lifeline Claims System (LCS)

Filing system that service providers use to **receive reimbursement** for offering Lifeline-supported services to eligible consumers.

# National Lifeline Accountability Database Background

The <u>National Lifeline Accountability Database</u> (NLAD) allows service providers to enroll Lifeline eligible consumers in the program and manage their Lifeline subscribers.

- NLAD is available through USAC's <u>One Portal</u> system, which allows users to access all Universal Service Fund IT applications through the same portal.
  - In most states (with the exception of <u>NLAD opt-out states</u> California\*, Oregon, and Texas), service providers use NLAD to enroll their consumers.
- Service providers must enroll subscribers in NLAD in order to claim reimbursements.

<sup>\*</sup>Service providers in California with broadband-only subscribers must use NLAD to enroll these subscribers

## **Account Types Overview**

- Different NLAD <u>account types</u> provide users with various types of system access.
- Account types for NLAD and the National Verifier are created in NLAD.
- To perform transactions in NLAD and the National Verifier, service provider representatives must <u>register for a</u> <u>Representative ID</u>.
  - A Rep ID must be linked to a user's NLAD account by the ETC Administrator to be able to process subscriber transactions in NLAD or access the National Verifier.



## Account Types and Functions (1 of 2)

#### 497 Officer

Must certify reimbursement claims.

Manages the ETC Administrator user role in NLAD.

#### **ETC Administrator**

Manages subaccounts (Analyst, Operations, and Agent) and can perform subscriber transactions, query subscriber data, and view reports.

User also has access to the National Verifier to check consumer eligibility.

Account Types and Functions (2 of 2)

#### **ETC Analyst**

Can perform subscriber transactions, query subscriber data, and view reports.

User also has access to the National Verifier to check consumer eligibility.

#### **ETC Operations**

Can query subscriber data and view reports.

User also has access to the National Verifier to check consumer eligibility.

#### **ETC Agent**

**Only** has access to the National Verifier to check consumer eligibility.

User does not have NLAD access.

### **Transaction Methods**

Service providers can perform transactions in NLAD using the following methods:

- Individual Transactions (Portal): Providers can perform individual transactions for one consumer at a time in the NLAD user interface (UI).
- **Batch Upload:** Providers can complete a <u>batch template</u> (CSV format file) to perform multiple transactions from a single file upload in NLAD.
- **NLAD API:** Providers can use an Application Programming Interface (API), which connects their billing or customer management system directly to NLAD to perform transactions.

### **Transaction Types**

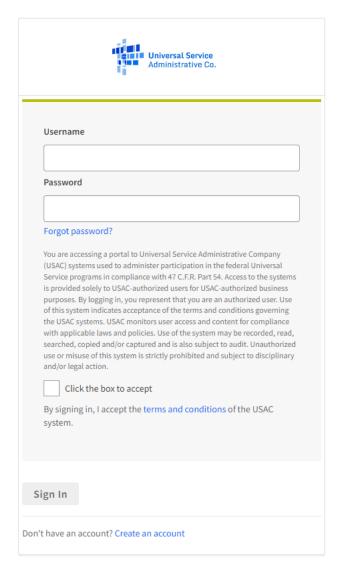
- Verify: Allows a provider to pre-validate whether a subscriber transaction would successfully process in NLAD.
- Enroll: Enrolls a new subscriber in Lifeline and adds consumer to the service provider's NLAD subscriber records.
- Transfer: Transfers an existing Lifeline subscriber from their current service provider in NLAD to allow the transacting provider to provide Lifeline service to the subscriber.
- **Update:** Allows a provider to update a subscriber's information such as the subscriber's contact information.
- **De-Enroll:** Removes or de-enrolls a subscriber from NLAD who no longer receives the Lifeline benefit.

## **Enrolling a Subscriber**

Portal, Batch, & NLAD API

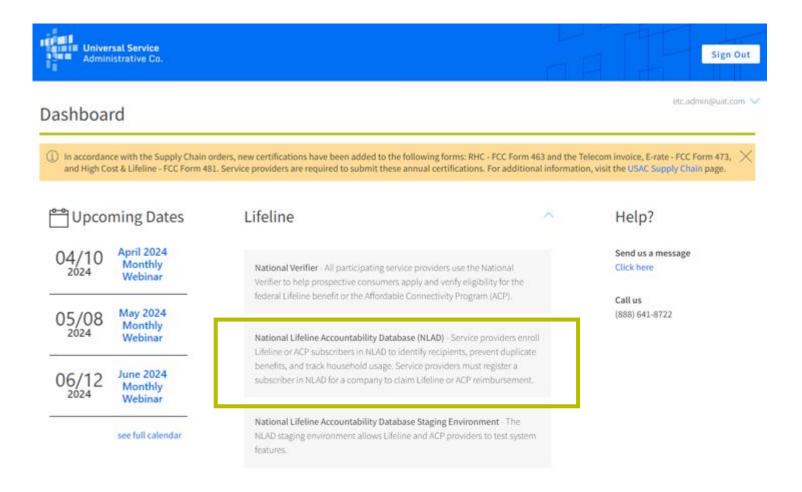
# **Enrolling a Subscriber – Portal**Sign in to One Portal

 Access NLAD online through USAC's One Portal.



## **Enrolling a Subscriber – Portal**Select NLAD

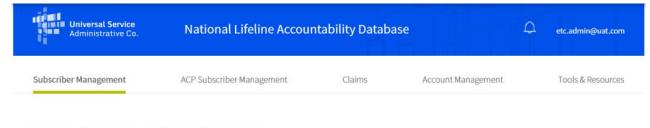
 Once logged into One Portal, select NLAD.



## **Enrolling a Subscriber - Portal**

## **NLAD Home Page**

- Select Subscriber Management to see the types of transactions a user role can perform.
- Select Tools and Resources to view reports, user guides, API specifications, field descriptions, and more.



USAC Home | Lifeline Program | NLAD | Subscriber Management

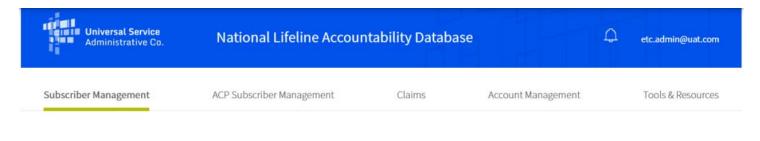
#### Subscriber Management

Welcome to NLAD Subscriber Management. Here you can enroll, transfer, update, or de-enroll a subscriber and ensure your records are up to date. For assistance, please refer to the Instructions guide on each of the pages

- Enroll Subscriber Enroll a qualified subscriber in the Lifeline Program. Also used to verify a subscriber's eligibility and enrollment status.
- Transfer Lifeline Benefit Transfer a qualified subscriber's benefit to your company.
- Update Subscriber Update an existing subscriber's NLAD record
- Upload Subscriber File Perform batch transactions. Enroll, transfer, update, or de-enroll more than one subscriber at a time.
- De-Enroll Subscriber Remove a subscriber who no longer receives a Lifeline benefit.
- Lookup Subscriber Verify whether or not a consumer already receives the Lifeline benefit.
- Submit Resolution Request Submit a resolution request for a transaction rejected in the legacy workflow.

## **Enrolling a Subscriber – Portal**Select Enroll Subscriber

 From the Enroll Subscriber workflow, you can verify a subscriber's information and/or directly enroll them into NLAD.



USAC Home | Lifeline Program | NLAD | Subscriber Management

#### Subscriber Management

Welcome to NLAD Subscriber Management. Here you can enroll, transfer, update, or de-enroll a subscriber and ensure your records are up to date. For assistance, please refer to the Instructions guide on each of the pages

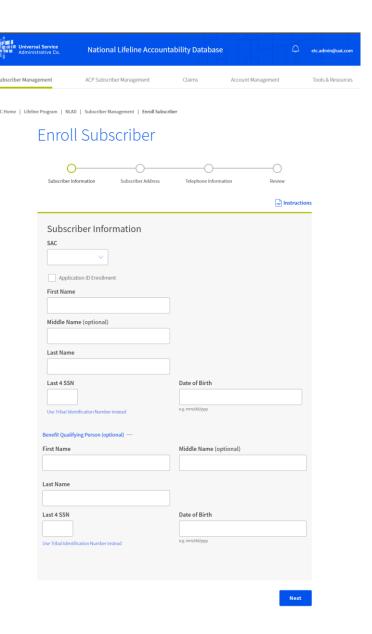
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## Enrolling a Subscriber – Portal Enter Subscriber Information

 Fill in the subscriber's information (first name, last name, date of birth, SSN4 or Tribal ID - if applicable, and address)

#### OR

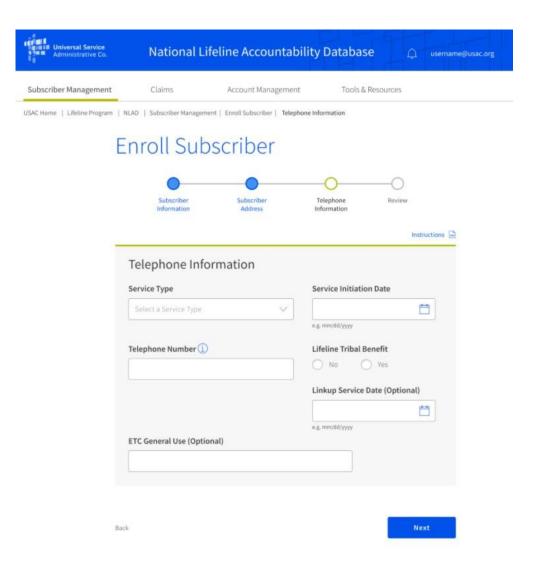
Select the checkbox
 "Application ID Enrollment"
 and fill in the relevant fields
 (first name, last name, date
 of birth, and Application ID).



## Enrolling a Subscriber - Portal

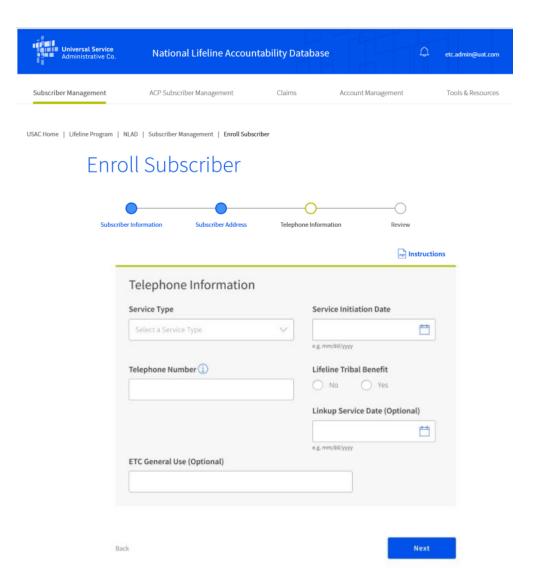
### Enter Service Information (1 of 2)

- Enter in the subscriber's service information:
  - Service Type: Subscriber's Lifeline service offering: voice, broadband, bundled voice, bundled broadband, or bundled voice and broadband.
  - Service Initiation Date: Date the service provider initiated Lifeline service.
  - Telephone Number: Subscriber's phone number (if applicable).



# Enrolling a Subscriber – Portal Enter Service Information (2 of 2)

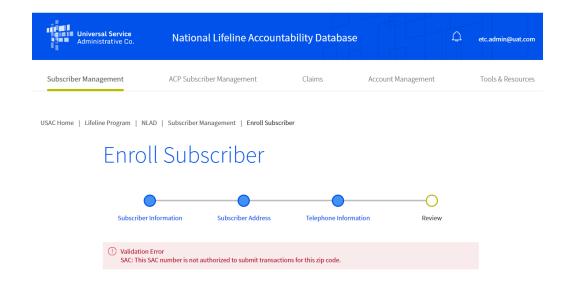
- Lifeline Tribal Benefit: Required field to claim Lifeline Tribal support for a qualified subscriber. This field will not appear if the subscriber's address falls on non-Tribal lands.
- Linkup Service Date: Date of Linkup Service (mm/dd/yyyy format).
- **ETC General**: Optional field that some service providers use to enter a subscriber's account number or to track the subscriber in their internal systems.



## Enrolling a Subscriber – Portal View Enrollment Status

#### **Unsuccessful Enrollment**

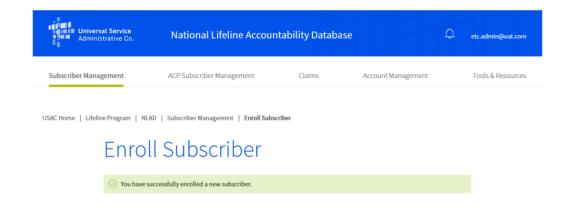
- If an enrollment is not successful because of missing or incorrectly formatted data, the associated error messages will display at the top of the page in red.
  - You will be redirected to the Transaction
     Unsuccessful page, where you will see
     the related error messages, as well as the transaction details.



## Enrolling a Subscriber – Portal View Enrollment Status

#### **Successful Enrollment**

 Upon successful enrollment, you will be taken to the **Transaction Successful** page, where you will see a success message, followed by a read-only display of the enrollment details.



## **Enrolling a Subscriber - Batch Upload**

## Enrolling a Subscriber - Batch Upload

Overview

Service providers can submit batch files to perform multiple transactions in NLAD

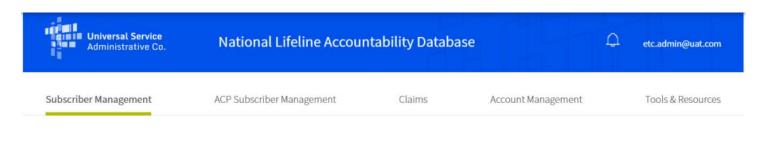
- Batch uploads can:
  - Contain one or many transactions.
  - Include multiple Study Area Codes (SACs) and transaction types.

# **Enrolling a Subscriber – Batch Upload**Prepare Batch Files

- Fill in the <u>batch template</u> with subscriber information.
  - Provide all required fields for the transaction type.
  - Do not change/modify any of the template headers.
  - For full descriptions of all input fields, including restrictions and requirement status, review the <u>detailed field descriptions</u>.
- Save the file
  - File name must start with a six-digit SAC number and end with a .csv extension.
  - For example, 999999-Company.csv.

# **Enrolling a Subscriber – Batch Upload**Upload Subscriber File

To submit batch files, select
 Upload Subscriber File.



USAC Home | Lifeline Program | NLAD | Subscriber Management

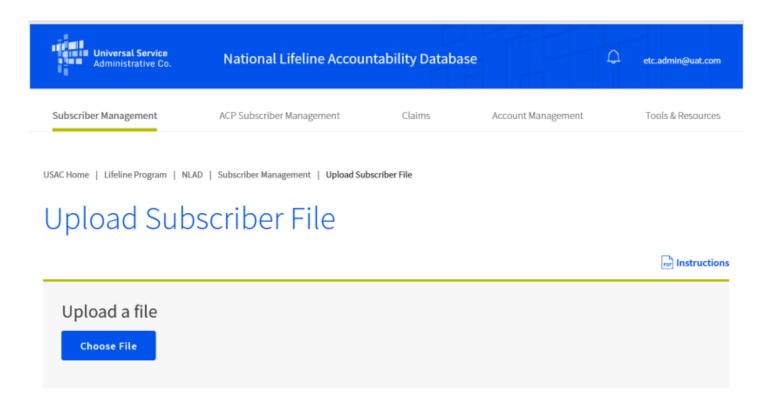
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# **Enrolling a Subscriber – Batch Upload**Upload Subscriber File

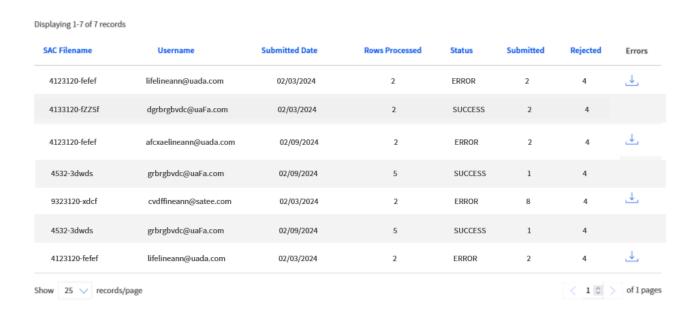
- Select Choose File and then select the file to upload.
- Select **Upload** to submit the file.



### **Enrolling a Subscriber - Batch Upload**

#### Retrieve Batch Status and Feedback

- NLAD provides the status of batch files in the Uploaded Files table.
- If the file uploads successfully, the status will be SUCCESS.
- If the file does not upload successfully, the status will be ERROR.
  - Download the ERROR file to understand which transactions were rejected and why.
  - Correct errors and upload a new batch file.
    - Tip: Do not include subscribers who were previously successfully uploaded.



## **Questions?**

### **Enrolling a Subscriber - NLAD API**

### **Enrolling a Subscriber - NLAD API**

#### Overview

- The NLAD API allows for a computer-to-computer connection.
- The NLAD API allows service providers to connect their billing or customer management system directly to NLAD so that their system can send enrollments or other transactions and pull reports automatically.
  - For example, a service provider captures a consumer's enrollment in their own billing system, and the billing system sends the enrollment information to NLAD.
  - To use the NLAD API, service providers must have a signed <u>Interconnection Security</u>
     <u>Agreement (ISA)</u> with USAC.

# Enrolling a Subscriber – NLAD API Obtain API Access to NLAD

- Review the API Specifications.
  - Information on how a service provider can integrate NLAD into their existing business models is available within the NLAD API Specifications document, which can be found in the Tools & Resources section in NLAD.
- Complete Technical Development and Testing.
  - Technical work is required to establish an API connection.
  - The API Specifications will assist technical teams with development.
- Submit a Signed Interconnection Security Agreement to USAC.
  - An ISA is an agreement established between USAC and service providers to document the technical requirements and security components of the interconnections between IT systems.

## Enrolling a Subscriber – NLAD API Obtain API Access to NLAD

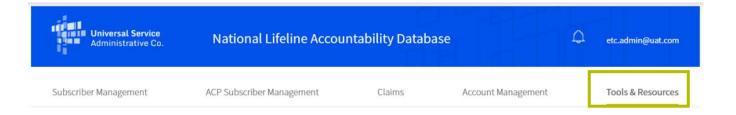
Service providers accessing NLAD via the API must submit to USAC:

- API ID(s) they would like to register for API production access.
  - If the provider has not created an API ID yet, the ETC Administrator can create an API account in NLAD.
- Completed and signed ISA.
- The domain information for the service provider.

### Resources

Resources are available in the **Tools and Resources** section of NLAD:

- Reports
- User Guide
- NLAD API Specifications
- Field Descriptions



USAC Home | Lifeline Program | NLAD | Tools & Resources

#### Tools & Resources

- Reports Review reports on Lifeline subscribership and activity.
- EBBP/ACP Reports Review reports on EBBP and ACP subscribership and activity.
- Tribal Lands Eligibility Verification Check if a subscriber's address is on Tribal lands. For information purposes only.
- EBBP/ACP User Guide Information on using the system.
- EBBP/ACP API Specification Learn how to connect to EBBP/ACP by API.
- EBCA API Specification Learn how to connect to EBCA/ACP by API.
- User Guide Information on using the NLAD system.
- NLAD API Specification Learn how to connect to NLAD by API.
- NV API Specification Learn how to connect to the National Verifier by API.
- NV API ISA Required agreement to connect to USAC's systems by API.
- Field Descriptions Detailed information on required fields in NLAD.
- EBBP/ACP Field Descriptions Detailed information on required fields in EBBP/ACP.
- Training Videos Review information on using NLAD.

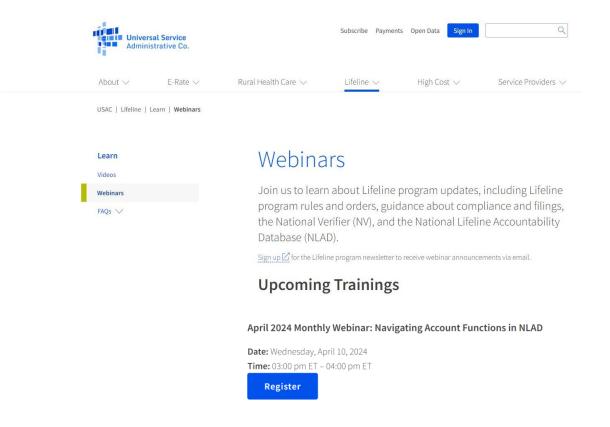
### **NLAD Resources**

- More information can be found on the <u>NLAD section</u> of our website, including:
  - National Verifier NLAD Input Templates Field Names and Descriptions.
  - NLAD Maintenance Schedule and Release Notes.
- View <u>NLAD instructional videos</u> on USAC.org.
- Contact <u>LifelineProgram@usac.org</u> for technical questions and assistance and general NLAD inquiries.

### **Next Month's Training Topic**

### Navigating Account Functions in NLAD

- Join us on April 10, for an overview of how to perform the following transactions in NLAD:
  - Verify
  - Transfer
  - Update
  - De-enroll
- Register to attend.



## **Questions?**

## **Thank You!**



