RAD: Linking Accounts

Lifeline Program Update

July 10, 2019
Housekeeping

• Audio is available through your computer’s speakers
• The audience will remain on mute
• Enter questions at any time using the “Questions” box
  • There is a large audience signed in today. We will accept as many questions as possible!
• If your audio or slides freeze, restart the webinar
• Copy of the slide deck in the “handouts” section of webinar panel
Today’s Presenters

Brandi Streauslin  

Catie Miller  

Leah Sorini
Agenda

1. Announcements
2. Overview
3. Linking Accounts to Existing Representatives
4. Linking Accounts to New Representatives
5. Linking Representatives to NLAD API
6. Unlinking Accounts
7. Questions
Announcements

Representative Accountability Database (RAD)
Announcements

- RAD launched on Tuesday, June 25
  - Representatives can begin registering for a Representative ID via LifelineRAD.org
- Service providers can request the revised NLAD API Specifications for RAD and the revised bulk upload template by contacting the Lifeline Support Center
Overview

Linking Representative IDs to Accounts
Implementation Phase 2: Linking Accounts

1. Representative takes their ID to the service provider(s) that they perform Lifeline transactions for.

2. ETC Admin will initiate the creation of new NLAD or NV accounts or add to existing accounts (only during the Adoption Period).

3. NLAD will communicate with RAD to validate the Representative ID.
Implementation Phase 2: Linking Accounts

• During the week of July 15, USAC will announce that service providers will be able to begin linking a Representative ID to test accounts in the pre-production environment.

• During the week of July 22 USAC will announce that it will release additional RAD changes in the production and pre-production environments:
  • Service providers will be required to provide a Representative ID for new accounts created in the production environment.
  • Service providers will have the ability to begin linking a Representative ID to existing accounts in the production environment.
  • Service providers will be able to test changes to NLAD that include the errors they or their subaccount users would experience if trying to submit a transaction with a locked out Representative ID.
Implementation Phase 2: Linking Accounts
User Roles

• NLAD and National Verifier user roles that need a Representative ID:
  • ETC Admin
  • ETC Agent
  • ETC Analyst
  • ETC Operations
• Roles that do not require a Representative ID:
  • 497 Officer
  • Any state user role
• **497 Officers** have to link Representative IDs to **ETC Admin** roles
• **ETC Admins** have to link Representative IDs to all **subaccount** roles
Implementation Phase 2: Linking Accounts
Linking Representatives to NLAD API

• Representatives submitting transactions via the API are not required to have a NLAD subaccount role

• Service providers have the ability to link active Representative IDs to API IDs (regardless of having an existing NLAD subaccount or not) via the file upload process or 1 by 1 through the NLAD UI
Implementation Phase 2: Linking Accounts

Master Agents

• A **Master Agent** is an individual that contracts directly with ETCs and oversees or manages a team of people working to complete Lifeline enrollments.

• Master Agents should register for a Representative ID.

• If a representative works for a Master Agent, the carrier will need to link the Master Agent’s Representative ID to the ETC and representative.
  • The Master Agent Representative ID will be linked at the same time the representative is linked to the ETC.
Linking Accounts to Existing Representatives

RAD Implementation Phase 2
Linking Accounts to Existing Representatives

File Upload

- ETC Admins will upload a file to NLAD to link a Representative ID to existing representatives’ subaccounts
  - The file may contain one or more accounts
- The file template will be posted on USAC’s website and includes the following fields:
  - First Name
  - Last Name
  - Representative ID
  - User Name (user’s NLAD email address)
  - API ID (ETC API ID)
  - Master Agent First Name
  - Master Agent Last Name
  - Master Agent Representative ID (the ETC Admin should include the Master Agent’s information for all representatives that this applies to)
Linking Accounts to Existing Representatives

File Upload

- All 8 column headers are required in the file template
  - Values for “User Name” and “API ID” are conditional (1 of the 2 are required, but cannot have values for both in the same row)
  - Master Agent values are optional

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>firstName</td>
<td>lastName</td>
<td>representativeId</td>
<td>userName</td>
<td>apId</td>
<td>masterAgentFirstName</td>
<td>masterAgentLastName</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<tr>
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<tr>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Linking Accounts to Existing Representatives

File Upload

The ETC Admin clicks “Manage Representative IDs.”

This column displays how many rows in a file were rejected.

If any Representative IDs received an error, you can download this file to see what errors are associated with the Representative IDs.
# Linking Accounts to Existing Representatives

File Upload: Sample File Error Report

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Batch Row</td>
<td>Representative ID</td>
<td>Field Name</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>123456789</td>
<td>userName</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>123456789</td>
<td>representativeld</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>123456789</td>
<td>representativeld</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Representative ID populates here.
Linking Accounts to New Representatives
RAD Implementation Phase 2
Linking Accounts to New Representatives
Representative ID Required

This is a new field. The ETC Admin enters the Representative ID here.
## Linking Accounts to New Representatives

### Potential Errors

<table>
<thead>
<tr>
<th>Scenario</th>
<th>NLAD Response during linking</th>
<th>Can be linked?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Representative ID is not provided</td>
<td>Representative ID is required</td>
<td>NO</td>
</tr>
<tr>
<td>Representative has a failed Representative ID status</td>
<td>Representative ID: Representative has unresolved errors</td>
<td>NO</td>
</tr>
<tr>
<td>Representative ID is not in RAD</td>
<td>Representative ID: Representative ID not found</td>
<td>NO</td>
</tr>
<tr>
<td>Representative’s Representative ID has been locked</td>
<td>Representative ID: Representative ID cannot be applied to new user accounts</td>
<td>NO</td>
</tr>
<tr>
<td>The Representative ID exists in RAD, but the submitted First Name, Last Name, and Representative ID combination does not match what is in RAD</td>
<td>Representative ID: First Name, Last Name and Representative ID do not match</td>
<td>NO</td>
</tr>
<tr>
<td>Representative ID is active and the First Name, Last Name match what is in RAD</td>
<td>Subaccount created</td>
<td>YES</td>
</tr>
</tbody>
</table>
Linking Accounts to New Representatives
Representative ID Required

This error will display once a Representative ID is required for any new account created in NLAD if the ETC Admin does not include a Representative ID.

The ETC Admin enters the Representative ID here.
Linking Accounts to New Representatives
Representative ID not Found

Validation Error
- Representative ID: Representative ID not found.

Authorized NLAD User Information

- Email Address: JS@pinkphonescom
- Confirm Email Address: JS@pinkphonescom
- First Name: Jane
- Last Name: Smith
- Phone Number: XXX-XXX-XXXX
- Representative ID: 123456789

This error will display if the Representative ID is not found. The ETC Admin may have mistyped the Representative ID or the representative provided the incorrect Representative ID. The representative should reference the email they received once they successfully registered for their Representative ID.

Representative ID is entered here.
Linking Accounts to New Representatives
Unresolved Representative ID Errors

Validation Error
- Representative ID: Representative has unresolved registration errors.

Authorized NLAD User Information

Email Address
Confirm Email Address*

First Name*
Last Name*
Jane
Smith

Phone Number*
Representative ID*
XXX-XXX-XXXX
123456789

Instructions

This error will display if the representative has unresolved errors associated with their Representative ID. The representative will need to resolve the errors before the ETC Admin can create the representative's user account.

Representative ID is entered here.
Linking Accounts to New Representatives
Representative ID Locked

Validation Error
- Representative ID: Representative ID cannot be applied to new user accounts.

Instructions

Authorized NLAD User Information

Email Address
Confirm Email Address
Search

Email Address: JS@pinkphones.com
First Name: Jane
Last Name: Smith
Phone Number: 123456789

Representative ID is entered here.

This error will display if the Representative ID is locked out from Lifeline systems.
Linking Accounts to New Representatives
First Name, Last Name, and Representative ID Don’t Match

This error will display if the Representative ID does not match the first and last name that the representative registered with. The ETC Admin should confirm the information with the representative.

Representative ID is entered here.
# Linking Accounts to New Representatives

## Master Agent: Potential Errors

<table>
<thead>
<tr>
<th>Scenario</th>
<th>NLAD Response during linking</th>
<th>Can be linked?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 or more of the Master Agent fields have information, but 1 or more</td>
<td>Incomplete Master Agent: If any Master Agent information is provided, then all Master Agent</td>
<td>NO</td>
</tr>
<tr>
<td>fields are missing</td>
<td>information is required</td>
<td></td>
</tr>
<tr>
<td>Master Agent has a failed Representative ID status</td>
<td>Master Agent Representative ID: Representative has unresolved errors</td>
<td>NO</td>
</tr>
<tr>
<td>Master Agent Representative ID is not in RAD</td>
<td>Master Agent Representative ID: Representative ID not found</td>
<td>NO</td>
</tr>
<tr>
<td>Master Agent Representative’s Representative ID has been locked</td>
<td>Master Agent Representative ID: Representative ID cannot be applied to new user accounts</td>
<td>NO</td>
</tr>
<tr>
<td>User and Master Agent Representative IDs are active and the First Name,</td>
<td>Subaccount created</td>
<td>YES</td>
</tr>
<tr>
<td>Last Name match what is in RAD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Linking Accounts to New Representatives
Master Agent

The Master Agent is an optional field. The ETC Admin should provide Master Agent information for all representatives that this applies to.

This error will display if the Master Agent’s representative ID is not found.

The ETC Admin should enter the Master Agent or third party marketing representative information here.
Linking Accounts to New Representatives
Account Successfully Created
Linking Representatives to NLAD API

RAD Implementation Phase 2
Linking Representatives to NLAD API

Overview

To submit a Representative ID by API for a given NLAD transaction, that Representative ID must be linked to the API ID.

There are two options for how to link a Representative ID to an API ID:

- Use the batch linking process and file upload on the Manage Representative IDs page
- Individually link representatives on the Update NLAD Subaccount page
Linking Representatives to NLAD API

Navigate to the “Manage NLAD Subaccounts” page and search by User ID of the ETC API account you want to add representatives to.

Select “View All Subaccounts” then select the API ID from the table.
Linking Representatives to NLAD API

Add a Representative ID to a new account.

Authorized Representatives for this API ID

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>ETC Rep ID</th>
<th>Master Agent Last Name</th>
<th>Master Agent First Name</th>
<th>Master Agent Rep ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>RAT</td>
<td>RAT</td>
<td>123456789</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subaccount Permissions

<table>
<thead>
<tr>
<th>SPIN</th>
<th>14301824</th>
</tr>
</thead>
</table>
Linking Representatives to NLAD API

Enter representative information here.
Linking Representatives to NLAD API

This error will display if the representative ID is not found. The ETC Admin may have mistyped the Representative ID or the representative provided the incorrect Representative ID. The representative should reference the email they received once they successfully registered for their Representative ID.
Linking Representatives to NLAD API

This error will display if the ETC Admin did not enter all Master Agent information.
Linking Representatives to NLAD API
Unlinking Accounts

RAD Implementation Phase 2
Unlinking Accounts

If a representative should no longer be linked to a service provider or to certain SPINs that they were previously linked to, there are two ways to perform the unlinking:

1. If you deactivate the user account, the representative will no longer be linked to any of the SPINs associated with that user account.

2. If you visit the “Update NLAD Subaccount” page and remove SPINs that the user account has access to, the representative will no longer be linked to those SPINs.

If a representative should no longer be linked to an NLAD API ID, you select “Remove” in the “Authorized Representative for this API ID” section of the Update NLAD Subaccount page for the API ID.
Unlinking Accounts
Subaccount

If the ETC Admin unselects a SPIN from the Subaccount Permissions table, then the Representative will no longer be linked to that SPIN.

If the account is deactivated, the representative will be unlinked from those SPINs.
Unlinking Accounts

API ID

The ETC Admin selects the representative and clicks “Remove” to unlink a representative from an API ID.
Unlinking Accounts

API ID

Authorized NLAD User Information
- Email Address: testingfortania@testrad.com
- First Name: sa
- Last Name: sa
- Phone Number: 5555555555
- Representative ID: 

Subaccount Role

NLAD Role ETC API

Authorized ETC Representatives

- Representative successfully removed.

Download ETC Representatives Report

Authorized Representatives for this API ID
Reminders

- A representative needs to have their account linked to all service providers for whom they work.
- Service providers do not have a limit to how many representatives are linked to their company.
Questions?
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