RAD: Linking Accounts

Lifeline Program Update

July 10, 2019

Universal Service Administrative Co.

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

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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

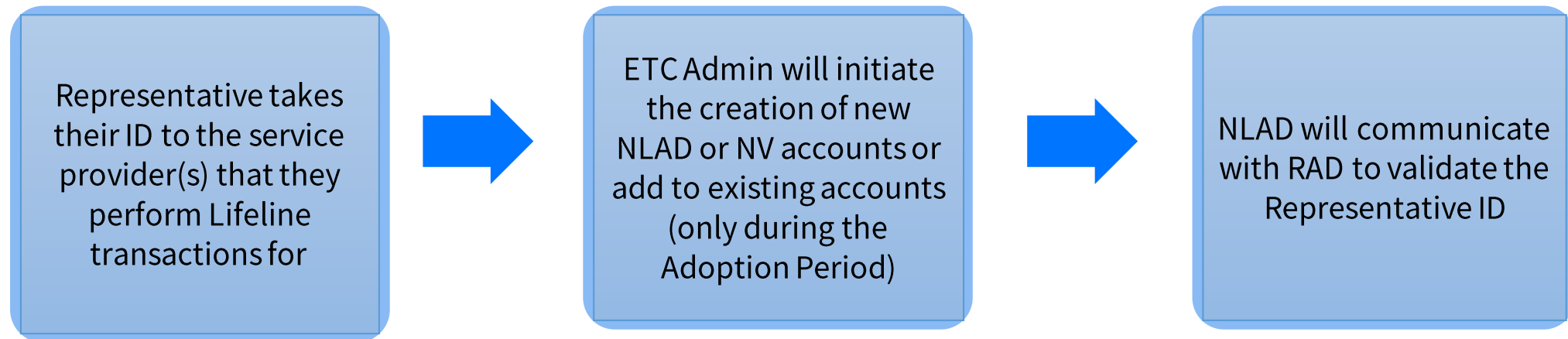Representative Accountability Database (RAD)

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

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

→

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

→

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

	A	B	C	D	E	F	G	H
1	firstName	lastName	representativeId	userName	apiId	masterAgentFirstName	masterAgentLastName	masterAgentRepID
2								
3								
4								
5								
6								
7								
8								
9								
10								

Linking Accounts to Existing Representatives
File Upload

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.

The ETC Admin clicks "**Manage Representative IDs**."

SUBSCRIBER MANAGEMENT

Enroll Subscriber
Update Subscriber
Transfer Lifeline Benefit
De-Enroll Subscriber
Submit Resolution Request
Upload Subscriber File
Lookup Subscriber

ACCOUNT MANAGEMENT

ETC Administrator Home Page
Manage Representative IDs
Manage NLAD Subaccounts
Create NLAD Subaccount
Create ETC API Account
Manage Email Recipients
Change Password

MANAGE REPRESENTATIVE IDS

Instructions

Select a File: Choose File | No file chosen   Upload

Filename	Date	Rows	Status	Submitted	Rejected	Errors
Uploaded Files						
david_ni-test2.csv	May 09, 2019 11:32:47 am	1	Errors	1	1	Download File
david_ni-test2.csv	May 09, 2019 10:32:19 am	1	Errors	1	1	Download File
david_ni-test2.csv	May 08, 2019 10:59:20 pm	1	Errors	1	1	Download File
david_ni-test2.csv	May 08, 2019 10:57:51 pm	1	Errors	1	1	Download File
david_ni-test2.csv	May 08, 2019 10:56:00 pm	1	Errors	1	1	Download File
	May 08, 2019					

Linking Accounts to Existing Representatives
File Upload: Sample File Error Report

Representative ID populates here.

	A	B	C	D	
1	Batch Row	Representative ID	Field Name	Error Message	Error Data
2	1	123456789	userName	User Name does not exist.	ST@pinkphones.com
3	2	123456789	representativeId	Representative ID not found.	123456789
4	3	123456789	representativeId	First Name, Master Agent Last Name and Master Agent Representative ID do not match.	123456789
5					
6					
7					
8					

Linking Accounts to New Representatives

RAD Implementation Phase 2

Linking Accounts to New Representatives
Representative ID Required

Linking Accounts to New Representatives
Potential Errors

Scenario	NLAD Response during linking	Can be linked?
Representative ID is not provided	Representative ID is required	NO
Representative has a failed Representative ID status	Representative ID: Representative has unresolved errors	NO
Representative ID is not in RAD	Representative ID: Representative ID not found	NO
Representative's Representative ID has been locked	Representative ID: Representative ID cannot be applied to new user accounts	NO
The Representative ID exists in RAD, but the submitted First Name, Last Name, and Representative ID combination does not match what is in RAD	Representative ID: First Name, Last Name and Representative ID do not match	NO
Representative ID is active and the First Name, Last Name match what is in RAD	Subaccount created	YES

Linking Accounts to New Representatives
Representative ID Required

SUBSCRIBER MANAGEMENT

Enroll Subscriber
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De-Enroll Subscriber
Submit Resolution Request
Upload Subscriber File
Lookup Subscriber

ACCOUNT MANAGEMENT

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CREATE NLAD SUBACCOUNT

Instructions

Representative ID is 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.

Authorized NLAD User Information

Email Address*
Confirm Email Address*

Search

Email Address   Joe.Smith@pinkphones.com

First Name*   Last Name*

Joe   Smith

Phone Number*   Representative ID*

XXX – XXX - XXXX

The ETC Admin enters the Representative ID here.

Linking Accounts to New Representatives
Representative ID not Found

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.

SUBSCRIBER MANAGEMENT

Enroll Subscriber
Update Subscriber
Transfer Lifeline Benefit
De-Enroll Subscriber
Submit Resolution Request
Upload Subscriber File
Lookup Subscriber

ACCOUNT MANAGEMENT

ETC Administrator Home Page
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Manage Email Recipients
Change Password

CREATE NLAD SUBACCOUNT

Instructions

Validation Error
- **Representative ID : Representative ID not found.**

Authorized NLAD User Information

Email Address*   JS@pinkphonescom

Confirm Email Address* JS@pinkphonescom

Search

Email Address   JS@pinkphonescom

First Name*   Last Name*

Jane   Smith

Phone Number*   Representative ID*

XXX – XXX - XXXX   123456789

Representative ID is entered here.

Linking Accounts to New Representatives
Unresolved Representative ID Errors

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.

SUBSCRIBER MANAGEMENT

Enroll Subscriber
Update Subscriber
Transfer Lifeline Benefit
De-Enroll Subscriber
Submit Resolution Request
Upload Subscriber File
Lookup Subscriber

ACCOUNT MANAGEMENT

ETC Administrator Home Page
Manage Representative IDs
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Manage Email Recipients
Change Password

CREATE NLAD SUBACCOUNT

Instructions

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

Authorized NLAD User Information

Email Address*

Confirm Email Address*

Search

Email Address   JS@pinkphones.com

First Name*   Last Name*

Jane   Smith

Phone Number*   Representative ID*

XXX – XXX - XXXX   123456789

Representative ID is entered here.

Linking Accounts to New Representatives
Representative ID Locked

This error will display if the Representative ID is locked out from Lifeline systems.

SUBSCRIBER MANAGEMENT

Enroll Subscriber
Update Subscriber
Transfer Lifeline Benefit
De-Enroll Subscriber
Submit Resolution Request
Upload Subscriber File
Lookup Subscriber

ACCOUNT MANAGEMENT

ETC Administrator Home Page
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Create NLAD Subaccount
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Change Password

CREATE NLAD SUBACCOUNT

Instructions

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

Authorized NLAD User Information

Email Address*

Confirm Email Address*

Search

Email Address   JS@pinkphones.com

First Name*   Last Name*

Jane   Smith

Phone Number*   Representative ID*

XXX – XXX - XXXX   123456789

Representative ID is entered here.

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.

SUBSCRIBER MANAGEMENT

Enroll Subscriber
Update Subscriber
Transfer Lifeline Benefit
De-Enroll Subscriber
Submit Resolution Request
Upload Subscriber File
Lookup Subscriber

ACCOUNT MANAGEMENT

ETC Administrator Home Page
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Change Password

CREATE NLAD SUBACCOUNT

Instructions

Validation Error
- **Representative ID : First Name, Last Name and Representative ID do not match.**

Authorized NLAD User Information

Email Address*

Confirm Email Address*

Search

Email Address   JS@pinkcphones.com

First Name*   Last Name*

Jane   Smith

Phone Number*   Representative ID*

XXX – XXX - XXXX   123456789

Representative ID is entered here.

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Linking Accounts to New Representatives
Master Agent: Potential Errors

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

Linking Accounts to New Representatives
Master Agent

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ACCOUNT MANAGEMENT

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Manage Email Recipients
Change Password

REPORTS AND TOOLS

Reports
Tribal Lands Eligibility Verification
User Guide
API Specification

CREATE NLAD SUBACCOUNT

Instructions

Validation Error
- **Master Agent Representative ID: Representative ID not found.**

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

Authorized NLAD User Information

Email Address*

Confirm Email Address*

[Search]

Email Address   Joe.Smith@pinkphones.com
First Name*   Last Name*
Joe   Smith
Phone Number*   Representative ID*
XXX – XXX - XXXX   123456789

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

Master Agent for Authorized NLAD User

☑ Master Agent *(Optional)*

First Name *   Last Name *   Representative ID *
Jane   Smith   123456789

> The ETC Admin should enter the Master Agent or third party marketing representative information here.

Linking Accounts to New Representatives
Account Successfully Created

CREATE NLAD SUBACCOUNT

Instructions

✅ Subaccount created

Subaccount Permissions

SPIN
143002644

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

SUBSCRIBER MANAGEMENT

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ACCOUNT MANAGEMENT

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Change Password

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

MANAGE NLAD SUBACCOUNTS

Instructions

Search by Email Address: [   ] Submit

For API Accounts, search by User ID

View All Subaccounts

Select "View All Subaccounts" then select the API ID from the table.

New Subaccount

Linking Representatives to NLAD API

Linking Representatives to NLAD API

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

UPDATE NLAD SUBACCOUNT

[Instructions](#)

Authorized NLAD User Information

Email Address   testsalmon@test.com

First Name*   Last Name*
test   stepone

Phone Number*   Representative ID
211-111-1111   N02N4A23N

Subaccount Role

NLAD Role ETC Operations

Subaccount Permissions

	SPIN
☑	143000734
☑	143000783
☑	143000556
☑	143000554

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.

Update   Reset Password   Deactivate

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

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?

Lifeline Program Webinar

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