NLAD Staging (Pre-Production) Guide: Testing RAD with **Individual User** Accounts

Contents

Overview

The information below describes how service providers can test the features of RAD in NLAD if they use an individual user account (i.e., ETC Administrator, ETC Analyst, ETC Operations, or ETC Agent accounts) to perform NLAD transactions.

The guide is intended to be used by ETC Administrators and 497 Officers. ETC Administrators are encouraged to use the guide to test linking a Representative ID to their subaccounts (any ETC Analyst, ETC Operations, or ETC Agent users whose account the Admin manages). 497 Officers are encouraged to use the guide to test linking a Representative ID to the account of the ETC Administrator(s) whose account they manage.

Linking Representative IDs to an individual user account (whether an existing or new user) in the NLAD staging environment has three purposes:

1. It allows service providers to test the process of linking Representative IDs to existing individual user accounts in bulk using the "Manage Representative IDs" page.
2. It allows service providers to test the process of linking a Representative ID to a new user account on the "Create NLAD Subaccount" page.
3. It allows service providers to test the validations on a Representative ID that will occur during transactions using the new test accounts created and linked to test Representative IDs.

To access the staging environment, use the same login credentials you use for the NLAD and National Verifier production environments. Please note that any testing performed in the staging environment is **not** reflected in the production environment

How to Test Linking Representative IDs to Existing User Accounts

Linking a representative to an existing user account is completed by populating a file template and uploading that file in NLAD. You can use the linking template to link a single Representative ID and account or to link multiple Representative IDs and accounts. You should use the test Representative IDs provided below to test the process of linking a Representative ID to existing individual user accounts.

Note: while USAC recommends testing the process of using the linking template to link a Representative ID to an existing user account, you will always receive an error doing so during testing ("First Name, Last Name and username do not match"). This is because RAD validates that the first and last name associated with the Representative ID match the first and last name associated with the account. In addition to the errors that could be encountered due to formatting issues with the file, service providers will receive an error informing them that the first name, last name, and username do not match if they try to link a Representative ID to an existing account in staging. While you will receive this error for each existing account that you attempt to link, this practice will help you ensure that you are comfortable formatting and populating the bulk linking template correctly.

Test Linking Representative IDs to Existing Accounts

1. Download the linking file template from the RAD Adoption Period page of USAC's website.
2. Populate the template with the following for each representative you want to link to an existing account:
    - First name, last name, and Representative ID of the test representative,
    - The username of the account you want the representative to be linked to, and
    - First name, last name, and Representative ID of a different test representative if you want to test linking one representative to another as a Master Agent.
3. Save your file in the .CSV format.
4. Log in to NLAD using your ETC Administrator or 497 Officer account.
5. Navigate to the "Manage Representative IDs" page from the left-hand navigation panel.
6. Select the "Choose File" button and locate your file.
7. Select the "Upload" button.
8. A new entry will appear in the "Uploaded Files" table. It may take several minutes for your file to process.
9. You will have the option to download a file from the "Errors" column of the table. The file will specify which row(s) had a problem and the associated error message(s).

How to Test Linking Representative IDs to New User Accounts

You should use the test Representative IDs provided below to test the process of linking a Representative ID to existing individual user accounts. Representative IDs can only be linked to new accounts one at a time, at the time of account creation. It is not possible to link a Representative ID to a new account using the file upload functionality.

Test Linking Representative IDs to New Accounts

1. Log in to NLAD using your ETC Administrator or 497 Officer account.
2. Navigate to the "Create NLAD Subaccount" page from the left-hand navigation panel.

3. Input the email address that you would like to be the username of the new NLAD or NV account. ***Note***: *the email address used as the account username does not need to be the same as the email address that was used during registration for a Representative ID.*
4. After submitting the email address for the new account, input the account details:
   - Use a first and last name and Representative ID from the table below and
   - Use any phone number.
   - If you want to test linking one representative to another as a Master Agent, select the checkbox in the "Master Agent" field and input the first name, last name, and Representative ID of a different test representative.
5. Complete the account creation by selecting the user role for the new account and the SPINs the account should be able to access, then submit.

Test Representative IDs of different statuses will yield different errors during the linking process. See the table below for the expected response based on the status of the Representative ID.

How to Test Validations on Representative IDs during Transactions

After you link Representative IDs to user accounts, you can send transactions using those Representative IDs in the staging environment.

RAD will not change the process of submitting a transaction (such as an enroll, update, verify, or transfer transaction) for service providers that use NLAD's website. The validations on a Representative ID that take place during a transaction happen behind the scenes – service providers will not notice anything new unless they try to submit a transaction using an account linked to a locked Representative ID.

Test Errors for Locked Representatives

If you want to test the error that a user would encounter if their Representative ID is locked and they try to perform a transaction in NLAD, create a test account using one of the Representative IDs that will have an initial status of "Active" but that will change to "Locked" at a later date. If you create the test account while the status of that Representative ID is active, and try to submit an enrollment after the status has been updated to locked, you will receive an error notifying you that the transaction cannot be completed because the Representative ID is locked.

Test Representative IDs

The following table describes the Representative IDs available for testing. There is no limit to the number of ETCs that can link a given Representative ID to an account.

Representative ID	First Name	Last Name	Status 7/16-8/1	Status 8/1 onward
AB1234567	Test	Kay	Active	Active
CD1234567	Test	Case	Active	Active
EF1234567	Test	Jones	Active	Locked
GH1234567	Test	Clear	Active	Locked
JK1234567	Test	Lyn	Unresolved registration errors	Unresolved registration errors
LM1234567	Test	Potter	Unresolved registration errors	Unresolved registration errors

PQ1234567	Test	Snapple	Locked	Locked
RS1234567	Test	Stake	Locked	Locked
123ABC456	Test	Blue	Invalid ID	Invalid ID
789DEF012	Test	Rodriguez	Invalid ID	Invalid ID
RS1234567	Test	Green	Invalid first/last name	Invalid first/last name
JK1234567	Test	Lee	Invalid first/last name	Invalid first/last name

Representative ID	First Name	Last Name	Status 9/9-30	Status 9/30 onward
JC1234567	Test	Jeremy	Active	Locked
SM1234567	Test	Regina	Active	Locked

Expected Response by Status

The following table describes the response a service provider will receive when attempting to link a Representative ID of a certain status to an account or when attempting to submit a transaction with a Representative ID of a certain status.

Status	Expected Error When Linking	Expected Error During Transaction (UI)	Expected Error During Transaction (API/Batch)*
Active	n/a, successful transaction	n/a, successful transaction	n/a, successful transaction
Unresolved registration errors	Representative ID: Representative has unresolved registration errors.	n/a	repId: REPID_NOT_ACTIVE
Locked	Representative ID: Representative ID cannot be applied to new user accounts.	repId: Representative ID is not active.	repId: REPID_NOT_ACTIVE
Invalid ID	Representative ID: Representative ID not found.	n/a	repId: REPID_NOT_FOUND
Invalid first/last name	Representative ID: First Name, Last Name and Representative ID do not match.	n/a	n/a
Representative not linked	n/a	repId: Representative ID not linked.	repId: REPID_NOT_LINKED

* Please see the API Specifications for a full list of errors that a service provider may encounter related to the Representative ID fields when using the API to submit transactions. Review the "NLAD Staging Linking Guide for API Users" for additional information on testing the linking process for API users.