

NLAD Production Guide: Linking Representative IDs to **API** Accounts

Contents

Overview	2
How to Link a Representative ID in Production	2
Link Representative IDs to an API ID One-by-One	2
Link Representative IDs to an API ID in Bulk.....	3
Providing Representative IDs with Transactions	4
How to Unlink Representative IDs in Production	4
Unlink Representative IDs from an API ID One-by-One.....	4
Unlink Representative IDs from an API ID in Bulk	5

Overview

An enrollment representative that performs eligibility checks, enrollments, or similar activities will require a linked Representative ID to complete transactions within NLAD and the National Verifier. This is required to comply with Lifeline's [Fifth Report and Order](#).

To support this requirement, a new field called "repld" has been added to all relevant API transaction requests.

To include a Representative ID in this field and comply with the rule, providers must first link the Representative ID to the API account, either one by one or through the bulk linking process.

This guide is intended to be used by ETC Administrators. ETC Administrators are responsible for linking Representative IDs to API IDs. The information below describes how an ETC Administrator can link and unlink a Representative ID to and from their company's API account.

How to Link a Representative ID in Production

Link Representative IDs to an API ID One-by-One

Step 1: Log in to [NLAD](#) using your ETC Administrator account.

Step 2: From the left-hand navigation panel, select the "**Manage NLAD Subaccounts**" page.

Step 3: Select the blue link for "**View all Subaccounts.**"

Step 4: Sort the "**Authorized NLAD Subaccounts**" table by role to locate the API ID.

Step 5: In the first column of the table, select the "**Edit**" link to navigate to the "**Update NLAD Subaccount**" page.

Step 6: Select the "**Add New ETC Representative**" button.

Step 7: Enter the first name, last name, and Representative ID of the Representative that you want to link to your API ID.

Step 8 (optional): Select the checkbox next to "**Master Agent (Optional)**" and provide the first name, last name, and Representative ID of a Master Agent if there should be a Master Agent associated with the API ID.

Note: Only follow step 8 if a Master Agent should be associated with the API ID. A Master Agent is an individual that contracts directly with Eligible Telecommunication Carriers (ETCs) and oversees or manages a team of people working to complete Lifeline enrollments.

Link Representative IDs to an API ID in Bulk

Step 1: Download the “[Linking Representatives File Upload](#)” template from the [RAD Resources](#) page of USAC’s website.

Step 2: Populate the template with the following for each representative you want to **link** to your API ID:

- Enter “link” in the “linkType” column to indicate you are **linking** Representative ID(s) to API ID(s).
- Enter the first name, last name, and Representative ID of the representative in the appropriate columns.
- Leave the “userName” column blank.
- Enter the API ID you want the representative to be linked to in the “apild” column.
Note: To link to an API ID you should only populate the “apild” column. Don’t populate the “userName” column or the “batch” column.
- Leave the “batch” column blank.
- Enter the first name, last name, and Representative ID of a Master Agent representative in the appropriate columns if there should be a Master Agent associated with the API ID.
Note: Only complete the Master Agent fields if a Master Agent should be associated with the API ID. A Master Agent is an individual that contracts directly with Eligible Telecommunication Carriers (ETCs) and oversees or manages a team of people working to complete Lifeline enrollments.

Step 3: Save your file in the .CSV format.

Step 4: Log in to [NLAD](#) using your ETC Administrator account.

Step 5: From the left-hand navigation panel, navigate to the “**Manage Representative IDs**” page.

Step 6: Select the “**Choose File**” button and locate your file.

Step 7: Select the “**Upload**” button.

Step 8: A new entry will appear in the “**Uploaded Files**” table. It may take several minutes for your file to process. Refresh the page to see the results.

Step 9: If there were errors associated with any of the rows in your file, you will have the option to download a file from the “**Errors**” column of the table. The file will specify which row of your file had a problem and will provide an associated error message. Any row in your file not specified as having an error will have processed successfully.

Providing Representative IDs with Transactions

After you link Representative IDs to an API ID, you can send transactions using those Representative IDs.

Use the NLAD API Specifications to make updates to verify, enroll, transfer, update, de-enroll, and Link Up requests. Two new fields have been added to each of these requests:

1. “repId”
2. “repNotAssisted”

RepId: This field should be used to send a Representative ID for the representative responsible for the transaction.

RepNotAssisted: This field should be used to indicate no representative was involved in the transaction (such as when an enrollment is submitted via a carrier’s online enrollment system and is not reviewed by a person before being submitted to NV or NLAD).

NLAD and NV API Specifications: These are available in NLAD, under the “**Reports and Tools**” section of the left-hand navigation menu.

How to Unlink Representative IDs in Production

Unlink Representative IDs from an API ID One-by-One

Step 1: Log in to [NLAD](#) using your ETC Administrator account.

Step 2: From the left-hand navigation panel, select the “**Manage NLAD Subaccounts**” page.

Step 3: Select the blue link for “**View all Subaccounts.**”

Step 4: Sort the “**Authorized NLAD Subaccounts**” table by role to locate the API ID.

Step 5: In the first column of the table, select the “**Edit**” link to navigate to the “**Update NLAD Subaccount**” page.

Step 6: Locate the “Authorized Representative IDs for this API ID” table, then locate the Representative ID you want to unlink within the table.

Step 7: Select the checkbox next to the Representative ID you want to unlink.

Step 8: Select the “Remove” button at the bottom of the table.

Unlink Representative IDs from an API ID in Bulk

Step 1: Download the “[Linking Representatives File Upload](#)” template from the [RAD Resources](#) page of USAC’s website.

Step 2: Populate the template with the following for each representative you want to **unlink** from your API ID (this file may include **one or more** representatives that need to be unlinked):

- Enter “unlink” in the “linkType” column to indicate you are **unlinking** Representative ID(s) from an API ID.
- Enter the first name, last name, and Representative ID of each representative that should be unlinked in the appropriate columns.
- Leave the “username” column blank.
- Enter the API ID you want the representative to be unlinked from in the “apiId” column.
Note: To unlink from an API ID you should only populate the “apiId” column. Don’t populate the “userName” column or the “batch” column.
- Leave the “batch” column blank.
- Leave the Master Agent columns blank.

Step 3: Save your file in the .CSV format.

Step 4: Log in to [NLAD](#) using your ETC Administrator account.

Step 5: From the left-hand navigation panel, navigate to the “**Manage Representative IDs**” page.

Step 6: Select the “**Choose File**” button and locate your file.

Step 7: Select the “**Upload**” button.

Step 8: A new entry will appear in the “**Uploaded Files**” table. It may take several minutes for your file to process. Refresh the page to see the results.

Step 9: If there were errors associated with any of the rows in your file, you will have the option to download a file from the “**Errors**” column of the table. The file will specify which row of your file had a problem and will provide an associated error message. Any row in your file not specified as having an error will have processed successfully.