

NLAD Production Guide: Linking Representative IDs to **Batch** Users

Contents

Overview.....	2
How to Link a Representative ID in Production.....	2
Link Representative IDs as Batch Users.....	2
Providing Representative IDs with Transactions.....	3
Unlink Representative IDs from Batch Users	4

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 batch subscriber (also called bulk subscriber) transactions on the [National Verifier NLAD Input Template](#). Service providers can review each field name and their corresponding descriptions using the [Field Names and Descriptions](#) guide.

To include a Representative ID in this field of a batch file and comply with the rule, providers must first link the Representative ID to their SPIN(s). Many service providers will accomplish this by linking a Representative ID to a representative's National Verifier or NLAD account or by linking their ID to the company's API account. However, if your company uses the batch file process and does not give its representatives their own accounts **and** does not use an API to submit the batch subscriber file, then you must link Representative IDs to your SPINs as batch users.

ETC Administrators are responsible for linking Representative IDs to their company's SPINs. The information below describes how an ETC Administrator can link and unlink a Representative ID to and from their company's SPINs as a batch user.

How to Link a Representative ID in Production

Link Representative IDs as Batch Users

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** as a batch user (this file may include **one or more** representatives that need to be linked):

- Enter "link" in the "linkType" column to indicate you are **linking** Representative ID(s) as a batch user.
- Enter the first name, last name, and Representative ID of the representative in the appropriate columns.
- Leave the "userName" and "apild" columns blank.

- Enter “Y” in the “batch” column to indicate you are linking a Representative ID to a batch user.
Note: To link to a batch user, you should only populate the “batch” column. Don’t populate the “userName” or “apild” columns.
- Enter the first name, last name, and Representative ID of a Master Agent representative if there should be a Master Agent associated with the batch user.
Note: Only complete the Master Agent fields if a Master Agent should be associated with the batch user. 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 your company’s SPINs, you can send transactions using those Representative IDs. A Representative ID can be linked to your company’s SPINs 3 ways:

1. By linking the Representative ID to the representative’s NLAD or National Verifier account,
2. By linking the Representative ID to the company’s API account, **or**
3. By linking the Representative ID to the SPINs as a batch user.

Note: It is only necessary to link the Representative ID to the company's SPINs through one of these ways in order to include the Representative ID in the "repld" column of a batch subscriber file.

Use the [National Verifier NLAD Input Template](#) to perform verify, enroll, transfer, update, de-enroll, and Link Up requests in bulk. Two new fields have been added to each of these requests:

1. "repld"
2. "repNotAssisted"

Repld: A Representative ID must be provided if a service provider representative assisted with the transaction.

RepNotAssisted: This field should be set to "1" if a representative did not assist with the transaction. This field should be left blank if a Representative ID is provided in the "repld" field.

Unlink Representative IDs from Batch Users

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 a batch user (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 your SPINs.
- Enter the first name, last name, and Representative ID of each representative that should be unlinked in the appropriate columns.
- Leave the "userName" and "apild" columns blank.
- Enter Y in the "batch" column to indicate you are unlinking a Representative ID that is linked as a batch user.

*Note: To unlink to a batch user, you should only populate the "batch" column. **Don't populate the "userName" or "apild" columns.***

- 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.