NLAD Production Guide: Linking Representative IDs to Individual User Accounts

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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 for Representative ID is available to 497 Officers and ETC Administrators when they create a new subaccount. 497 Officers and ETC Administrators can also link a Representative ID to existing accounts. A subaccount will not be able to perform eligibility checks, enrollments, or other transactions unless a Representative ID is linked to it.

This guide is intended to be used by 497 Officers and ETC Administrators. 497 Officers and ETC Administrators are responsible for linking a Representative ID to the subaccounts that they manage. For example, 497 Officers manage ETC Administrator accounts. ETC Administrators manage subaccounts that have the following roles: ETC Operations, ETC Analyst, and ETC Agent.

The information below describes how 497 Officers and ETC Administrators can link and unlink a Representative ID to and from subaccounts that they manage.

How to Link Representative IDs to Individual User Accounts

Link Representative IDs to **Existing** User Accounts

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 a user account:

- Enter "link" in the "linkType" column to indicate you are **linking** Representative ID(s) to individual users.
- Enter the first name, last name, and Representative ID of the representative in the appropriate columns.
- Enter the username of the representative's NLAD or National Verifier account. (This is the email address that they use when signing into NLAD or the National verifier.)
- Leave the "apiId" and "batch" columns blank.
- Enter the first name, last name, and Representative ID of a Master Agent representative if there should be a Master Agent associated with the user account (ETC Operations, Analyst, or Agent accounts only).

Note: Only complete the Master Agent fields if a Master Agent should be associated with the user account. 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. It is not possible to link a Master Agent to an ETC Administrator account.

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

Step 4: Log in to NLAD using your ETC Administrator or 497 Officer 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: Refresh the webpage. 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 linked successfully.

Link Representative IDs to **New** Accounts

Step 1: Log in to NLAD.

Step 2: This step differs for 497 Officers and ETC Administrators.

ETC Administrators: Navigate to the "**Create NLAD Subaccount**" page from the left-hand navigation panel.

497 Officers: Locate the "Update ETC Admin SPIN Permissions" table on the 497 Officer Home Page. Select the SPIN you want to assign to a new user and select the "Assign to New ETC Administrator" button.

Step 3: Input the email address that should be used for 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.*

Step 4: After submitting the email address for the new account, input the account details:

- The first name, last name, and Representative ID of the representative.
- The representative's phone number.
  Note: If the new account is for an ETC Administrator, include you company's address
- First name, last name, and Representative ID of a Master Agent representative if there should be a Master Agent associated with the user account (ETC Operations, Analyst, or Agent accounts only).
  Note: Only complete the Master Agent fields if a Master Agent should be associated with the user account. A Master Agent is an individual that contracts directly with ETCs and oversees or manages a team of people working to complete Lifeline enrollments. It is not possible to link a Master Agent to an ETC Administrator account.

Step 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.

Using Representative IDs with Transactions

Any transaction submitted in the National Verifier portal or on the NLAD website by an account that is linked to a Representative ID will automatically be associated with that Representative ID.

The validations on a Representative ID that take place during a transaction happen behind the scenes. An account holder whose account is linked to a Representative ID will not notice any changes when they submit transactions in the National Verifier or NLAD.

Unlink Representative IDs from User Accounts

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 user accounts (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 user account(s).
- Enter the first name, last name, and Representative ID of each representative that should be unlinked in the appropriate columns.
- Enter the username of each representative's NLAD or National Verifier account in the "userName" column.

- Leave the “apiId” and “batch” columns blank.
- Leave the Master Agent columns blank.

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

Step 4: Log in to NLAD.

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.