RAD Office Hours: API Users
Thursday, February 20
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

Catie Miller  Leah Sorini  Linnita Hosten  Brandi Streauslin
About RAD
Overview

1. Reps **self-register** and receive Rep ID

   ![Image of computer with Rep ID registration]
   
   lifelinerad.org

2. SPs collect Rep IDs

   ![Image of human figure]
   
   Rep ID: XXXXXXXXXX

3. ETC Admins link Reps to their API account(s) in NLAD

   ![Image of person with checkmark]

4. Transactions performed with linked API account

   RepID and RepNotAssisted fields included and populated correctly
How do we link Rep IDs to API accounts?

- Linking is performed in NLAD and there are two options to link a Representative ID to an API account:
  1. Use the batch linking process and file upload on the Manage Representative IDs page
  2. Individually link representatives on the Update NLAD Subaccount page

Can a representative be linked to an API account and user account?

- Yes, if you are using the bulk upload process, include the representative’s information in two rows, and the User Name in one and the API account in the other
FAQs
Linking & Unlinking

Can we link multiple representatives to an API account?
• Yes, you can link multiple representatives to an API account
• There is no limit to the number of representatives linked to an API account

How do we unlink a certain representative from an API account?
• If a representative should no longer be linked to an API account, you select “Remove” in the “Authorized Representative for this API account” section of the Update NLAD Subaccount page for the API account
FAQs
Transactions

Can we send different Rep IDs through one single API account?

- Yes, service providers should always send the Representative ID of the enrollment representative actually involved in the transaction
  - Most service providers have only one or two API accounts that the transactions performed by all their representatives are sent through
  - However, there can only be one Representative ID per transaction
  - If more than one representative as involved in the transaction, send the Representative ID of the representative most responsible for the enrollment
FAQs
Transactions

How do we correctly populate the RAD fields in API requests?

- **ReplID**: This field should be used to send a Representative ID for the representative associated with the transaction, or

- **RepNotAssisted**: This field should be used to indicate no representative was involved in the transaction
  - For example, when enrollment is submitted via a service provider’s online enrollment system and is not reviewed by a person before being submitted to NV or NLAD
RAD Mandatory, March 26

Reminders

- **Use of RAD is mandatory** March 26, 2020
- **ETC Administrators** are responsible for linking Representative IDs to API accounts
- There are two options to link a Representative ID to an API account:
  1. Use the batch linking process and file upload on the Manage Representative IDs page
  2. Individually link representatives on the Update NLAD Subaccount page
RAD Mandatory, March 26
RAD Checklist

✓ Ensure your enrollment representatives **self-register** for a Rep ID. All errors must be resolved before use of the Rep ID. This applies to both domestic and international.

✓ Collect each Representative ID.

✓ **Link** Representative IDs to the respective API accounts.

✓ Prepare changes to your internal systems to enable sending the appropriate Rep ID with transactions.

✓ Submit transactions via API with the correctly populated fields in the API Specifications (**RepId** and **RepNotAssisted**).
Caution

Failure to include a Representative ID when an enrollment representative is actually involved in the workflow is a violation of the Commission’s rules.

Failure to include the RAD fields in API transactions will result in errors and the transactions will not be completed.
Linking Representative IDs to API accounts

**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 NLAD SUBACCOUNTS**

- Search by Email Address:
- Submit

For API Accounts, search by User ID

- View All Subaccounts

**Instructions**

**Link in bulk**: Navigate to the "Manage NLAD Subaccounts" page and upload the bulk linking template.

**Link one-by-one**: Select "View All Subaccounts" then select the API account from the table.
Linking Representative IDs to API accounts
One-by-One

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

Enter representative information here
Linking Representative IDs to API accounts
Batch Process

- ETC Admins will upload the “Linking Representatives File Upload Template” to link a Representative ID to an API account in batch

- This template is found on USAC’s RAD Resources page

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>firstName</td>
<td>lastName</td>
<td>representativeID</td>
<td>userName</td>
<td>apid</td>
<td>masterAgentFirstName</td>
<td>masterAgentLastName</td>
<td>masterAgentRepID</td>
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</table>
Linking Representative IDs to API accounts
Batch Process

- Do not include spaces after a representative’s name when populating the template
- The file may contain one or more accounts
- 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)
  - If a Representative ID should be linked to a user name and API account, include the representative’s information in two rows, and the User Name in one and the API account in the other
- The Master Agent values are optional
Linking Representative IDs to API accounts

Batch Process: Link API and User Account

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>firstName</td>
<td>lastName</td>
<td>representativeId</td>
<td>userName</td>
<td>apiId</td>
<td>masterAgentFirstName</td>
<td>masterAgentLastName</td>
<td>masterAgentRoleId</td>
</tr>
<tr>
<td>Johnny</td>
<td>Kagent</td>
<td>KASAG7007</td>
<td><a href="mailto:johnnykagent@test.com">johnnykagent@test.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Johnny</td>
<td>Kagent</td>
<td>KASAG7007</td>
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<td></td>
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</tr>
<tr>
<td>Dork</td>
<td>Tohu</td>
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<tr>
<td>Test</td>
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<td></td>
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</tr>
</tbody>
</table>

**Second row:** Representative Johnny is linked to a user name

**Third row:** Representative Johnny is linked to an API account

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

- RAD Webpages
- RAD Webinar: Linking Accounts
- RAD Production Guide: Linking Representative IDs to API Accounts
- For testing purposes: NLAD Staging (Pre-Production) Guide: Testing RAD with API Accounts
Thank You!

• Thank you for joining us!
• Sign up to our Lifeline Program newsletter to receive the latest news about RAD
  • Visit our subscription center
• Need help? Contact us!
  • General inquiries: LifelineProgram@usac.org
  • RAD inquiries: LifelineSupport@usac.org