RAD Office Hours: Individual Users

Thursday, February 27
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

Leah Sorini  Linnita Hosten  Brandi Streuslin
About RAD
Overview

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

2. SPs collect Rep IDs
   - Rep ID: XXXXXXXX

3. ETC Admins link Reps to their subaccounts in **NLAD**

4. Reps perform transactions
   - USAC will **track** rep transactions through their Rep IDs as they are performed in NLAD and/or NV
FAQs
Registration

Who needs to register?

• NLAD/NV user roles require a Representative ID if the individual in that role is considered an enrollment representative and may perform Lifeline enrollments, eligibility checks, recertifications, etc.

• This includes enrollment representatives in opt-out states that use USAC’s systems for these activities.

Who is a Master Agent?

• Individuals that contract directly with ETCs and oversee or manage a team of people working to complete Lifeline enrollments.

How is a representative notified once they have successfully registered?

• All communication regarding the representative’s registration will be sent to the email they submitted when they began the registration process.
FAQs
Registration

Can a representative use their company email to register if they would like?

- A representative may use their company email to register for a Representative ID. USAC recommends that representatives use a personal email to maintain access to their Rep ID should they leave a particular company.

What PII is required during registration?

- Name, date of birth and an address (business or home) are always required. However, representatives who do not want to provide documentation to verify their identity should also provide their SSN4 and use their home address.

How is this PII protected?

- PII collected in RAD follows the same data security practices as data collected in NLAD, so the same privacy procedures that are followed for subscribers are applied to representatives.
- The NLAD system, where the RAD resides, has undergone Federal Information Security Modernization Act (FISMA) authorization in accordance with National Institute of Standards and Technology (NIST) standards.
RAD Mandatory, March 26

Reminders

- Use of RAD is mandatory March 26, 2020.
- 497 Officers are responsible for linking Representative IDs to ETC Administrators.
- ETC Administrators are responsible for linking Representative IDs to subaccounts (ETC Analysts, ETC Operations, and ETC Agents).
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 representatives.

✓ Collect each Representative ID.

✓ **Link** Representative IDs to the respective NLAD user accounts.

* When enrolling or updating subscriber information in NLAD, **if** you use the “**Subscriber Batch Upload File**,” make sure the RepID and RepNotAssisted fields are populated correctly.
RAD Mandatory, March 26
Caution

Beginning **March 26, 2020**, if a Representative ID is not linked to a NLAD user account, the user may be unable to perform National Verifier and/or NLAD transactions.
Linking Representative IDs to Individual Users
Existing Accounts

- ETC Admins and 497 Officers will upload the “Linking Representatives File Upload Template” to NLAD to link a Representative ID to existing representatives’ subaccounts.
- This template is on USAC’s RAD Resources page.

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- This is the email that the rep uses to log into NLAD and/or NV.
- The Master Agent is an optional field. The ETC Admin should provide Master Agent information for all representatives that this applies to.
Linking Representative IDs to Individual Users
Existing Accounts

• **Do not** include spaces after a representative’s name when populating template.
• The file may contain one or more accounts.
• All 8 column headers are required in the file template.
• Values for “Username” and “API ID” are conditional (1 of the 2 are required, but you cannot have values for both in the same row).
• Master Agent values are optional but should be included for representatives when applicable.
Linking Representative IDs to Individual Users
Existing Accounts

The ETC Admin clicks “Manage Representative IDs.”

This column displays how many rows in a file were rejected.

If any Representative IDs received an error, you can download this file to see what errors are associated with the Representative IDs.
Linking Representative IDs to Individual Users
New User Accounts

The ETC Admin enters the Representative ID here.
Linking Representative IDs to Individual Users
New User Accounts (Master Agent)

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

Where is the linking performed?

- Representative IDs are linked to NLAD/NV accounts in NLAD.

What is the “Username” field in the Linking Representatives File Upload Template?

- The “Username” field has to be the email address that the representative uses to log into NLAD and/or the National Verifier.

Does the representative’s username have to be the same email address that the representative used to register?

- No, the username email address (used for the NLAD/NV account) may be different than the email the representative uses during registration.
FAQs

Linking

If I am getting an error when linking my Representative IDs using the file upload template, how do I resolve it?

- If you are experiencing issues with the template, email LifelineProgram@usac.org. Make sure you indicate the error you are receiving and always provide the file you submitted and the error file you received after submission.
- This will allow the USAC support team to troubleshoot the issue in a faster and more efficient manner.

Can ETCs have more than one Rep ID linked to their accounts?

- There is no limit to the amount of representatives that may be associated with a service provider.
- However, only 1 Rep ID can be linked to a subaccount (ETC Agent, ETC Analysts, ETC Ops).

Where can we find information on the instructions to link Representative IDs to accounts?

- The RAD Resources page includes linking guides (NLAD Production Guide: RAD with Individual User Accounts).
FAQs
Linking & Unlinking

Is linking a Representative ID instant?

• Linking is instant if there are no validation errors. You will receive an error in NLAD if the Rep ID does not match the first/last name, the Rep ID is locked, or the representative has unresolved registration errors.

How do we unlink a certain representative from a subaccount?

• To unlink a representative from a user account, select “deactivate” on the “Update NLAD Subaccount” page. The account can be recreated without adding a Representative ID.
Subscriber Transactions with Rep ID
National Verifier Paper Application

Representatives assisting consumers with paper applications must complete page 7 of the application:

5. Agent Information

 Answer only if a sales person submits this form.

Representative includes their Representative ID here.
**Subscriber Transactions with Rep ID**

**NLAD Subscriber Batch Upload**

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<tbody>
<tr>
<td>serviceType</td>
<td>replId</td>
<td>repNotAssisted</td>
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- This is the NLAD file used to enroll or update subscriber information in bulk.
- **replId**: 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 set to "0" or left blank if a Representative ID is provided in the replId field.
Subscriber Transactions with Rep ID
NLAD Subscriber Batch Upload

• Updated NLAD Input Template and National Verifier Mode NLAD Input Templates are on the NLAD Resources page.
• NLAD Field Descriptions with the RAD fields are on the NLAD Resources page.
Resources

- RAD Webpages
- RAD Webinar: Linking Accounts
- RAD Production Guide: Linking Representative IDs to Individual User Accounts
- *For testing purposes:* NLAD Staging (Pre-Production) Guide: Testing RAD with Individual User Accounts
Poll Question!

- Do you use the subscriber batch file process to submit transactions in NLAD?
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