NLAD User Guide for Release 4.1.0

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Document Version 3

National Lifeline Accountability Database (NLAD)

Contents

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1. Introduction

This user guide provides procedural instructions for using the National Lifeline Accountability Database (NLAD) Access Portal (NAP) to perform functions necessary for managing subscribers in NLAD, perform eligible telecommunications carrier (ETC)-related account management functions, and generate reports about subscribers, transactions, and resolution statuses.

1.1. NLAD Capabilities

The available roles are:

- 497 Officer

- ETC Administrator

- ETC Analyst

- ETC Operations

The available NLAD capabilities are:

- Login/Logout/Change Password

- Upload Subscriber File

- ETC Account Management

- Subscriber Management

- ETC Reports

For support questions related to NLAD, contact NLAD Customer Service at 877-524-1325, or NLADsupport@usac.org.

1.2. Supported Web Browsers

The NLAD system is supported in the following web browsers:

- Internet Explorer (IE) Version 8

- Internet Explorer (IE) Version 9

- Firefox Version 21

2. Login

This article explains how to log into and out of the NLAD system.

2.1. Log In to NLAD

In order to log into NLAD, an account must be created for you. The username for the account will be the email address the account creator used to create your NLAD account. When your account is initially created, you will be assigned a temporary password that will expire after 72 hours.

To log into NLAD, go to https://nlad.universalservice.org

1. Enter your username into the **User Name** field.

2. Enter your password into the **Password** field. If this is your first time logging into NLAD, you will need to enter your temporary password.

3. Click **Login**.

If this is your first time logging into NLAD, you will be directed to the NLAD Access Agreement page**.**

If the login attempt is unsuccessful, the system will display an error message stating that your credentials are invalid.

NOTE: After three invalid login attempts or 90 days without changing your password, the system will lock your account and display an error message. If your account has been locked, please choose the appropriate contact from the table below, based on your role.

Role	Contact
ETC Administrator	497 Officer
ETC Analyst	ETC Administrator
ETC Operations	ETC Administrator

2.1.1. NLAD Access Agreement page

After successfully logging in for the first time, you will be directed to the NLAD Access Agreement page. Read through the agreement, and then either click:

Accept to accept the NLAD Access Agreement and continue to the Warning page, or

Decline to decline the agreement and be directed to the Access Denied Page.

NOTE: The NLAD Access Agreement may be amended at any time with or without notice, by posting revised terms at NLAD Access Agreement.

2.1.2. Warning Page

At the Warning page, read through the warning, and then either click:

Accept at the bottom of the page to accept the warning and proceed to the designated landing page, or

Decline to decline the warning and be directed to the Access Denied Page.

NOTE: The warning page will be displayed each time you log into NLAD. The warning page may be amended at any time, with or without notice to you.

2.1.3. Landing page

The landing page will differ depending on your role. If it is your first time logging in, you will be directed to the Change Password page (see Change Password for more information).

The following table details where the system will direct you based on your role.

Role	Landing Page
ETC Administrator	ETC Administrator Home page
ETC Analyst	Upload Subscriber File page
ETC Operations	Lookup Subscriber page
497 Officer	497 Officer Home page

2.1.4. Access Denied page

You will be directed to the Access Denied page if you choose to decline the Access Agreement or the Warning page. The Access Denied page will inform you that you are not authorized to use the site, provide a link to return to the Login page, and will provide NLAD contact information for any questions.

2.2. Log Out of NLAD

1. After you have successfully logged into the system, you may log out at any time by clicking **LOG OUT** from the upper-right hand corner of any page.

NOTE: If you select a link to a page on the Universal Service Administrative Company's (USAC) website, located at the bottom of the page, or under the LIFELINE banner, the system will notify you that, if you proceed, you will be logged out of your current session to be directed to the selected destination.

2.3. Login Page Screenshot

USAC
Universal Service Administrative Company

National Lifeline Accountability Database (NLAD)

User Name: _____

Password: _____

This system may be accessed by authorized users only. By logging in, the user represents himself or herself as an authorized user. This system is monitored, recorded and subject to audit. Any unauthorized use or misuse of this system is strictly prohibited and subject to legal action, including criminal prosecution and civil penalties.

For technical issues, please contact USAC at NLADSupport@usac.org or call us at 877-524-1325
Need help with your username or password? Please contact your company administrator.

Login

3. Change Password

This article explains how to change your NLAD account password.

3.1. Change Password Page

1. To navigate to the Change Password page, click the **Change Password** link from the Account Management section of the sidebar.

2. Type your current password into the **Old Password** field.

3. Type your new password into the **New Password** field. Your new password must meet the following criteria:

    a. Minimum of eight characters.

    b. Contains one uppercase letter.

    c. Contains one lowercase letter.

    d. Contains one number.

    e. Contains one of the following special characters: ` ! @ $ % ^ * ( ) - _ + [ ] ; : " , < . > / ?

    f. Does not match any of the last eight passwords you have used for your account.

4. Type your new password again into the **Confirm New Password** field.

5. Click <u>Submit</u> to complete the password change.

If the password change was successful, you will receive an email notification confirming that your password has been changed.

3.2. Change Password Page

4. Enroll Subscriber

This article explains how to enroll a new subscriber into NLAD, how to verify a potential subscriber's information prior to enrollment, how to confirm a subscriber's Link Up benefit at an address, and how to deal with unsuccessful enrollments.

Applies to: *ETC Analyst, ETC Administrator.*

4.1. Enroll Subscriber Page

From the Enroll Subscriber page, you can confirm Link Up, verify a subscriber's information and/or directly enroll them into NLAD.

To get to the Enroll Subscriber page, click the **Enroll Subscriber** link from the Subscriber Management section of the sidebar.

4.1.1. Verifying Subscriber Information

Prior to assigning a phone number to a subscriber and enrolling them into NLAD, you can first verify their information to check for errors or issues that would prevent successful enrollment. This is an optional process which validates the subscriber's information and address, and runs the NLAD business rules on the data entered. The verification process is identical to the enroll process, with the exceptions that the subscriber is not entered into NLAD, and the Phone Number and Service Initiation Date fields are optional. If you opt to enter a phone number, it too will be checked.

Addresses are validated through the United States Postal System (USPS) Address Matching Service (AMS). The AMS system will reformat the address and search the national database for a single matching address. If a match is found, the address will be accepted. If a match is not found, the system will reject the entry with an error message.

To verify a subscriber's information, first enter the information in the appropriate fields as if you were going to enroll the subscriber (according to the instructions in the following section, Enrolling a Subscriber), and click **Verify** at the bottom of the page instead of Enroll. A success message, or a list of error messages, will appear at the top of the page.

4.1.2. Enrolling a Subscriber

NOTE: At any time, you may click **Reset** at the bottom of the page to clear all fields and reset the form. Required fields are denoted on the page with a superscript red asterisk (*).

1. Select the appropriate study area code (SAC) from the **Select SAC** drop-down menu (required). The SAC is a six-digit number that associates the Eligible Telecommunications Carrier (ETC) providing the Lifeline benefits to the subscriber.

2. Enter subscriber's information into the Subscriber Name and Personal Information section (required).

   a. Enter the subscriber's last name into the **Last Name** field (required). The Last Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

b. Enter the subscriber's date of birth into the **Date of Birth** field (required). The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY). For example, 11/13/1956.

c. Enter the last four digits of the subscriber's social security number in the **Last 4 SSN** field (required). The Last 4 SSN field will only accept four numeric characters.

   NOTE: The subscriber's social security number (SSN) is preferred, but if it is not available, the system will accept the subscriber's Tribal Identification number or Tribal enrollment number (Tribal ID). However, it is not possible to provide both the SSN and the Tribal ID.

d. Enter the subscriber's Tribal ID into the **Tribal ID** field (only required if SSN is not provided). The Tribal ID field cannot be less than two alphanumeric characters or contain more than 20. This field also accepts the hyphen character (-).

e. Enter the subscriber's first name into the **First Name** field (required). The First Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

f. Enter the subscriber's middle name into the **Middle Name** field (optional). The Middle Name field cannot contain more than 50 alphabetic characters. This field also accepts the period (.) character (so that an initial can be entered), the SPACE character, and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

g. Enter the subscriber's phone number into the **Phone Number in NLAD** field (Optional). This is the number currently registered to the user in the NLAD system. The phone number must be exactly 10 numeric-characters long.

3. Enter data into the fields of the Subscriber Address Information section (required).

a. Enter the subscriber's address into the **Primary Address** field (required). The Primary Address field cannot contain more than 50 alphanumeric characters.

b. Enter the subscriber's secondary address information into the **Apt, Unit, etc.** field (optional). This field is used if the subscriber's address contains a secondary descriptor and number; for example, "unit #3." The Apt, Unit, etc. this field cannot contain more than 50 alphanumeric characters.

c. Enter the subscriber's city in the **City** field (required). The City field cannot contain more than 50 alphabetic characters.

d. Select the subscriber's state from the **State** drop-down menu (required)**.** If the **State** selected is Puerto Rico, an optional **Urbanization Code** field is displayed.

e. Enter the subscriber's ZIP code into the **ZIP** field (required). The ZIP field cannot be less than five numeric characters, and cannot contain more than nine numeric characters. When entering a nine-digit ZIP code, format the entry with a hyphen after the first, five numeric characters. For example, 90905-4443.

   Addresses are validated through the USPS AMS. The AMS system will reformat the address and search the national database for a single matching address. If a match is found, the address will be accepted. If a match is not found, the system will reject the entry with an error message.

4. Enter data into the mailing address section (optional). This section is only used if the subscriber's mailing address is different than their primary address, if the primary address is not a USPS deliverable address (such as a rural address), or if the subscriber receives their mail via Post Office Box (P.O. Box).

    a. Enter the subscriber's mailing address into the **Mailing Address** field. The Mailing Address field cannot contain more than 50 alphanumeric characters.

    b. Enter the subscriber's secondary address information into the **Apt, Unit, etc.** field (optional). This field is used if the subscriber's address contains a secondary descriptor and number; for example, unit #3. The Apt, Unit, etc. field cannot contain more than 50 alphanumeric characters.

    c. Enter the subscriber's city in the **City** field. The City field cannot contain more than 50 alphabetic characters.

    d. Select the subscriber's state from the **State** drop-down menu. If the **State** selected is Puerto Rico, an optional **Urbanization Code** field is displayed.

    e. Enter the subscriber's ZIP code into the **ZIP** field. The ZIP field cannot be less than five numeric characters, and contain no more than nine numeric characters. When entering a nine-digit ZIP code, format the entry with a hyphen after the first five numeric characters. For example, 90905-4443.

5. Enter data into the Subscriber Telephone Information section (Optional to Verify, required to Enroll for all *Service Types* except **Broadband**).

    a. Select the subscriber's Service Type (Required) from the **Service Type** drop-down menu. There are 5 service types/plans available to eligible lifeline subscribers:

        1) **Voice**: Subscriber is provided a Voice only service that meets the minimum service standards.
        2) **Broadband**: Subscriber is provided a Broadband only service that meets the minimum service standards. NOTE: the **Phone Number** field is optional when _Broadband only_ service type is selected for **Enroll** transactions.
        3) **Bundled - Voice**: Subscriber is provided a Voice and Broadband service that meets the Voice minimum service standards only.
        4) **Bundled - Broadband**: Subscriber is provided a Voice and Broadband service that meets the Broadband minimum service standards only.
        5) **Bundled - Voice and Broadband**: Subscriber is provided a Voice and Broadband service that meets both the Voice and Broadband minimum service standards.

    b. Enter the service initiation date into the **Service Initiation Date** field. The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY). The service initiation date is the date that service providers determine that the subscriber was eligible for Lifeline program supported service. You cannot select a service initiation date occurring in the future.

        Note: You may select the service initiation date from the **Service Initiation Date** calendar widget by clicking the left arrow in the upper-left corner of the widget to select a month, and clicking on the appropriate number for the day. **The Service Initiation Date cannot occur prior to 12/10/1985.**

c. Enter the subscriber's phone number into the **Phone Number** field. The subscriber's telephone number must be exactly ten numeric characters long; for example, 123-555-5555.

d. **Tribal Lifeline Benefit** selection (Required); choose "Yes" or "No" as appropriate from the radio button option. Select "Yes" to claim Lifeline Tribal support for a qualified subscriber to whom Tribal rates are being offered.

6. Enter data into the fields of the Subscriber Eligibility Information section (required).

   a. Select the subscriber's appropriate program from the **Eligible Program** drop-down menu (required).
   E1- Medicaid
   E2- Supplemental Nutrition Assistance Program (Food Stamps or SNAP)
   E3- Supplemental Security Income (SSI)
   E4- Federal Public Housing Assistance (Section 8)
   E8- Bureau of Indian Affairs General Assistance
   E9- Tribally- Administered Temporary Assistance to Needy Families (TTANF)
   E10- Food Distribution Program on Indian Reservations (FDPIR)
   E11- Tribal Head Start
   E13- Eligibility Based on Income
   E14- Program Eligibility Approved by State Administrator
   E15- Veterans Pension or Survivors Pension
   E16- State Eligibility Waiver (**NOTE**: Program code should only be used by States that were granted a waiver by the FCC; California, Maryland, Michigan, New York, Utah, Vermont, Washington, Wisconsin)

NOTE: In compliance with the [2016 Lifeline Modernization Order](#) the following Enrollment Eligibility codes were retired:
E5- Low-Income Home Energy Assistance Program (LIHEAP)
E6- Temporary Assistance to Needy Families (TANF)
E7- National School Lunch Program's Free Lunch Program
E12- State Assistance Programs (If Applicable)

b. Choose "Yes" or "No" (default is "no") as appropriate from the radio button options (optional):

   i. **Independent Economic Household** (IEH) -This flag indicates that the subscriber is an independent economic entity sharing an address with another Lifeline subscriber. If this flag is indicated, the ETC must collect and retain an IEH worksheet from the subscriber.

      1. Enter the subscriber's IEH certification date into the **Subscriber IEH Certification Date** field (required if IEH flag is chosen). The IEH certification date is the date that the IEH certification was performed for the subscriber. The subscriber IEH certification date field should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY).

         Note: You may select the subscriber's IEH Certification date from the Subscriber IEH Certification Date calendar widget by clicking the left arrow in the upper left corner of the widget to select a month and clicking on the appropriate number for the day.

   ii. **Tribal Address** - This flag indicates that the subscriber's address is in Tribal lands and is not registered with the USPS address matching service (AMS). If Tribal Address is selected, you cannot select Temporary Address or Rural Address.

      1. If the subscriber's Tribal Address radio button is set to "Yes", enter the Linkup Service Date into the **Linkup Service Date** field. The Link Up Service date is the date Link Up Service started. The Linkup Service Date field should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY).

         Note: You may select the subscriber's Linkup Service date from the Linkup Service Date calendar widget by clicking the left arrow in the upper-left corner of the widget to select a month and clicking on the appropriate number for the day. **In order to have a date in the Linkup Service Date, the Tribal Address radio button must be set to "Yes".**

   iii. **Temporary Address** - This flag indicates that the primary address entered is a temporary location. If Temporary Address is selected, you cannot select Tribal Address or Rural Address.
      Note: If set to "no," it indicates that the primary address is a permanent location.

   iv. **Non-Deliverable Rural Address** - This flag indicates that the subscriber's primary address is in a rural area, and is not registered with AMS, nor able to receive postal

delivery. If Rural Address is selected, you cannot select Tribal Address, or Temporary Address.

7. Enter information into the **ETC General Use** field (optional). You may populate the ETC General Use field with any value, and it will be returned along with other transaction error messages; for example, you could enter a unique identifier in this field that will allow automation of the subscriber-lookup process within your own database when a transaction fails. The ETC General Use field accepts a maximum of 50 alphanumeric characters, the SPACE character, and the following special characters: period (.) , hyphen (-), underscore (_), colon (:), pound (#), and at sign (@).

8. Enter data into **Benefit Qualifying Person Information** section (optional). The benefit qualifying person (BQP) is the person who provides eligibility for Lifeline benefits to a Lifeline subscriber when the subscriber does not qualify. Typically, this person qualifies for Lifeline benefits, but cannot subscribe to a carrier on their own, and is a dependent of the subscriber.

   a. To open the Benefit Qualifying Person section, click on the checkbox next to the **Benefit Qualifying Person** title bar. You should see an extension to the enrollment form:

   b. Enter the BQP's last name into the **Last Name** field (required). The last name cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

   c. Enter the BQP's date of birth into the **Date of Birth** field (required). The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY); for example, 11/13/1956.

   d. Enter the last four digits of the BQP's social security number into the **Last 4 SSN** field. The Last 4 SSN field will only accept four numeric characters (required). Note: The BQP's social security number (SSN) is preferred but if it is not available, the system will accept the BQP's Tribal Identification number or Tribal Enrollment number (Tribal ID). However, it is not possible to provide both the SSN and the Tribal ID.

   e. Enter the BQP's Tribal ID into the **Tribal ID** field (required if the Last 4 SSN are not provided). When entering the BQP's Tribal ID you may enter the first two characters, last four, or the entire Tribal ID. The Tribal ID field cannot contain more than 20 alphanumeric characters. This field also accepts the hyphen character (-).

   f. Enter the BQP's first name into the **First Name** field (required). The first name cannot contain more than 50 alphabetic characters. This field accepts the following special characters: the apostrophe ('), the grave accent (`), and the hyphen (-).

g. Enter the BQP's middle name into the **Middle Name** field (optional). The Middle Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

9. Click **Enroll** to enroll the subscriber and complete the process.

4.1.2.1. Successful Enrollment

Upon successful enrollment, you will be taken to the Transaction Successful page, where you will see a success message, followed by a read-only display of the enrollment details.

NOTE: For successful Enroll transactions, each subscriber is assigned a **Subscriber ID.**

The **Subscriber ID** is a NLAD system-generated unique identifier (9 Characters/ Alphanumeric) that ETCs can use in lieu of a phone number to query a subscriber's information. ETCs can perform Update and De-enroll transactions with the Subscriber ID.

4.1.2.2. Unsuccessful Enrollment

If an enrollment was not possible because of missing or incorrectly formatted data, the associated error messages will display at the top of the page in red. If the enrollment is not successful because the subscriber failed identity, age, or address validation, or if the subscriber has the same identity or phone number as another subscriber, you will be redirected to the Transaction Unsuccessful Page, where you will see the related error messages, as well as the transaction details. From this page, you can review the transaction and either modify the data and resubmit the transaction, or submit a resolution request to NLAD customer service.

To modify your data:

1. Below the transaction details, click **Modify Data Entered and Resubmit Transaction** to return to the Enroll page, which will be populated with all of the transaction data except for the address information.

2. Fill out the address fields again, and make the appropriate adjustments to the data.

3. Click **Enroll** to resubmit.

To submit a resolution request:

1. Provide the details for all required fields to resolve the transaction. Please refer to the Dispute Resolution page for more information on how to complete a valid resolution request.

    a. Enter the agent name and/or ID who reviewed the subscriber's information.

    b. Select the resolution code(s) that correspond with the documentation used to verify subscriber's information.

    c. Add a description explaining why the rejection was an error (optional).

    d. Check the certification box.

2. Click **Submit Resolution Request to NLAD Customer Service.**

NOTE: For Unsuccessful Enroll transactions, a **Subscriber ID** will NOT be automatically generated. ETCs will first have to resolve the transaction failure(s) to obtain their subscriber's Subscriber ID.

If a resolution request is submitted and approved, ETCs should review their NLAD Reports (*Detail Active Subscriber Report*, *Detail Transaction Report*, or *Summary and Detail Subscriber Snapshot Report)* to retrieve their subscriber's Subscriber ID.

4.1.3. Confirm Link Up

You can confirm Link Up by entering a subscriber's last name, DOB, Last 4 digits of SSN or tribal ID, and address to determine whether that subscriber has already received a Link Up benefit at that address. Link Up service may only be provided if there is no existing benefit at an address.

The Link Up service date will be returned if the subscriber is found to have received a Link Up benefit at the address provided.

1. Select the appropriate study area code (SAC) from the **Select SAC** drop-down menu (required). The SAC is a six-digit number that associates the Eligible Telecommunications Carrier (ETC) providing the Lifeline benefits to the subscriber.

2. Enter subscriber's information into the Subscriber Name and Personal Information section (required).

a. Enter the subscriber's last name into the **Last Name** field (required). The Last Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

b. Enter the subscriber's date of birth into the **Date of Birth** field (required). The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY).

c. Enter the last four digits of the subscriber's social security number in the **Last 4 SSN** field (required). The Last 4 SSN field will only accept four numeric characters. Note: The subscriber's social security number (SSN) is preferred, but if it is not available, the system will accept the subscriber's Tribal Identification number or Tribal enrollment number (Tribal ID).

d. Enter the subscriber's Tribal ID into the **Tribal ID** field (only required if SSN is not provided). The Tribal ID field cannot be less than two alphanumeric characters or contain more than 20. This field also accepts the hyphen character (-).

3. Enter data into the fields of the Subscriber Address Information section (required).

a. Enter the subscriber's address into the **Primary Address** field (required). The Primary Address field cannot contain more than 50 alphanumeric characters.

b. Enter the subscriber's secondary address information into the **Apt, Unit, etc.** field (optional). This field is used if the subscriber's address contains a secondary descriptor and number; for example, "unit #3." The Apt, Unit, etc. this field cannot contain more than 50 alphanumeric characters.

c. Enter the subscriber's city in the **City** field (required). The City field cannot contain more than 50 alphabetic characters.

d. Select the subscriber's state from the **State** drop-down menu (required)**.** If the **State** selected is Puerto Rico, an optional **Urbanization Code** field is displayed.

e. Enter the subscriber's ZIP code into the **ZIP** field (required). The ZIP field cannot be less than five numeric characters, and cannot contain more than nine numeric characters. When entering a nine-digit ZIP code, format the entry with a hyphen after the first, five numeric characters.

4. Click **Confirm Link Up** to enroll the subscriber and complete the process.

4.1.3.1. Link Up Confirmed

The Link Up service date will be returned if the subscriber is found to have received a Link Up benefit at the address provided.

4.1.3.2. Link Up Unconfirmed

A confirmation will be provided if a Link Up benefit cannot be found for the subscriber at that address.

ENROLL SUBSCRIBER

✅ **No Tribal Link Up information found. Link Up benefit may be provided.**

4.2. Enroll Subscriber Page Screenshot

4.3. Enroll Subscriber Page - National Verifier Mode

4.3.1. National Verifier Mode Toggle Button

For states who are using the National Verifier, there is a blue toggle button displayed at the top of the Enroll Subscriber page which can turn on NLAD into National Verifier Mode. When NLAD is in National Verifier Mode, subscribers who are enrolled or verified will have their eligibility checked in the National Verifier. During the soft launch period, SACs in National Verifier states will be defaulted to National Verifier Mode but the user will still be able to turn off National Verifier Mode. After the hard launch, NLAD will be permanently in National Verifier Mode for all Enroll and Verify transactions.

When the National Verifier Mode is ON, the Subscriber Eligibility Information section containing the following fields will not be displayed and cannot be edited:

- Eligible Program

- Independent Economic Household?

- IEH Certification Date

- Tribal Address?

- Linkup Service Date

- Temporary Address?

- Non-Deliverable Rural Address?

To turn on/off National Verifier Mode:

1. Navigate to the top of the Enroll Subscriber page and locate the National Verifier button in the top right corner, just underneath the "LOG OUT" option.

2. If National Verifier Mode is ON, click on the blue button to turn it off.

3. If National Verifier Mode is OFF, click on the gray button to turn it on.

4.3.2. National Verifier Mode ON Screenshot

National Verifier **ON**

Attention! You are using the National Verifier system. Switch the blue button to OFF to return to the NLAD system.

ENROLL SUBSCRIBER

Instructions

Select SAC*

Subscriber Personal Information   *(Required)*

Last Name *	Date of Birth *	Last 4 SSN * - OR- Tribal ID *

First Name *	Middle Name

Subscriber Address   *(Required)*

Primary Address *	Mailing Address

Apt, Unit, etc.	Apt, Unit, etc.

City *	State *	ZIP Code *	City	State	ZIP Code

Subscriber Telephone Information   *(Phone No. is Optional to Verify.)*

Service Type*	Select one	Service Initiation Date *	
Phone Number *		Lifeline Tribal Benefit? *	○ Yes ○ No

ETC General Use   *(Optional)*

☐ **Benefit Qualifying Person**   *(Optional)*

Reset	Confirm Link Up		Verify	Enroll

4.3.3. National Verifier Mode OFF Screenshot

National Verifier ⬤ OFF

Attention! You are using the NLAD system. On ▮▮▮▮▮▮ all users will be required to use the National Verifier system for this selected SAC.

ENROLL SUBSCRIBER

Instructions

Select SAC*

▮▮▮ ▾

Subscriber Personal Information   *(Required)*

Last Name *	Date of Birth *	Last 4 SSN *	- OR-	Tribal ID *

First Name *   Middle Name

Subscriber Address   *(Required)*

Primary Address *   Mailing Address

Apt, Unit, etc.   Apt, Unit, etc.

City *	State *	ZIP Code *	City	State	ZIP Code

Subscriber Telephone Information   *(Phone No. is Optional to Verify.)*

Service Type*   Select one ▾   Service Initiation Date *

Phone Number *   Lifeline Tribal Benefit? *   ○ Yes   ○ No

Subscriber Eligibility Information   *(Required)*

Eligible Program *   Select one ▾

Independent Economic Household?	○ Yes ⦿ No	IEH Certification Date
Tribal Address?	○ Yes ⦿ No	Linkup Service Date
Temporary Address?	○ Yes ⦿ No	
Non-Deliverable Rural Address?	○ Yes ⦿ No	

ETC General Use   *(Optional)*

☐ **Benefit Qualifying Person**   *(Optional)*

Reset   Confirm Link Up   Verify   Enroll

5. Update Subscriber

This article explains how to use the Update Subscriber page to make changes to an existing subscriber's record in NLAD.

Applies to: *ETC Analyst, ETC Administrator.*

5.1. Update Subscriber Page

From the Update Subscriber page, you can search for a subscriber using their **Phone Number** or **Subscriber ID**, edit the available data, and submit the changes.

To navigate to the Update Subscriber page, click the **Update Subscriber** link from the Subscriber Management section of the sidebar.

5.1.1. Update Subscriber

1. From the drop-down menu, select a search field (required).

    a. If the **Phone Number** field is selected, enter the subscriber's Phone Number.

    b. If the **Subscriber ID** field is selected, enter the subscriber's Subscriber ID.

2. Select the status of the subscriber in the **Update Type** drop-down menu (required).

    a. Select **Production** if the subscriber is an active subscriber in NLAD.

    b. Select **Duplicate Resolution** if the subscriber is in the duplicate resolution process. NOTE: The **Subscriber ID** cannot be used to update subscribers in Duplicate Resolution.

3. Click **Search**.

    a. If no valid match was found, the appropriate error message will be displayed.

        i. **Subscriber Not Found:** The subscriber does not exist in NLAD Production or NLAD Duplicate Resolution

        ii. **This request cannot be processed. This state is currently in the NLAD Duplicate Subscriber Resolution Process:** The subscriber is undergoing Track 1 or Track 2 Duplicate Resolution and cannot be updated.

        iii. **This request cannot be processed. Please e-mail NLAD Support at NLADsupport@usac.org:** A request must be sent to NLADSupport@usac.org due to more than one subscriber sharing the same phone number.

        iv. **This subscriber is currently undergoing duplicate resolution processing:** The subscriber is undergoing duplicate resolution and cannot be updated.

    b. If a matching subscriber is found, the subscriber's personal information will be displayed for your review.

4. Make the appropriate changes to the subscriber's information.

    a. With the exception of First Name, Last Name, Date of Birth, Last 4 SSN and Tribal ID, all fields can be changed, including the phone number if the subscriber is in **Production**. When the phone number is changed, use the new number to look up that subscriber again.

    b. Only the phone number can be changed if the subscriber is in **Track 1 or Track 2 Duplicate Resolution.** When the phone number is changed, use the new number to look up that subscriber again.

5. Click **Update** to submit the modified information to NLAD.

NOTE: the **Phone Number** field is optional when _Broadband only_ service type is selected for **Update** transactions.

5.1.1.1. Unsuccessful Update
Only for subscribers in **Production:**

All subscriber information will go through all validations before changes are committed to the subscriber record. If an update was not possible because of missing or incorrectly formatted data, the associated error messages will display at the top of the page in red. If the update is not successful because the subscriber failed identity, age, or address validation, or if the subscriber has the same identity or phone number as another subscriber, you will be redirected to the Transaction Unsuccessful Page, where you will see the related error messages, as well as the transaction details. From this page, you can review the transaction and either modify the data and resubmit the transaction, or submit a resolution request to NLAD customer service.

To modify your data:

1. Below the transaction details, click **Modify Data Entered and Resubmit Transaction** to return to the Update page, which will be populated with all of the transaction data except for the address information.

2. Fill out the address fields again, and make the appropriate adjustments to the data. If the State selected is Puerto Rico, an optional Urbanization Code field is displayed.

3. Click **Update** to resubmit.

To submit a resolution request:

1. Provide the details for all required fields to resolve the transaction. Please refer to the Dispute Resolution page for more information on how to complete a valid resolution request.

   a. Enter the agent name and/or ID who reviewed the subscriber's information.

   b. Select the resolution code(s) that correspond with the documentation used to verify subscriber's information.

   c. Add a description explaining why the rejection was an error (optional).

   d. Check the certification box.

2. Click **Submit Resolution Request to NLAD Customer Service**.

NOTE: For Unsuccessful Update transactions, a **Subscriber ID** will NOT be automatically generated. ETCs will first have to resolve the transaction failure(s) to obtain their subscriber's Subscriber ID.

If a resolution request is submitted and approved, ETCs should review their NLAD Reports (*Detail Active Subscriber Report*, *Detail Transaction Report*, or *Summary and Detail Subscriber Snapshot Report)* to retrieve their subscriber's Subscriber ID.

5.2. Update Subscriber Page Screenshot

5.3. Update Subscriber Page - National Verifier Mode

5.3.1. National Verifier Mode Toggle Button

For states who are using the National Verifier, there is a blue toggle button displayed at the top of the Update Subscriber page which can turn on NLAD into National Verifier Mode. When NLAD is in National Verifier Mode, subscribers who are updated will have their eligibility checked in the National Verifier. During the soft launch period, SACs in National Verifier states will be defaulted to National Verifier Mode but the user will still be able to turn off National Verifier Mode. After the hard launch, NLAD will be permanently in National Verifier Mode for all Update transactions.

When the National Verifier Mode is ON, the Subscriber Eligibility Information section containing the following fields will not be displayed and cannot be edited:

- Eligible Program

- Independent Economic Household?

- IEH Certification Date

- Tribal Address?

- Linkup Service Date

- Temporary Address?
- Non-Deliverable Rural Address?

To turn on/off National Verifier Mode:

1. Navigate to the top of the Update Subscriber page and locate the National Verifier button in the top right corner, just underneath the "LOG OUT" option.

2. If National Verifier Mode is ON, click on the blue button to turn it off.

3. If National Verifier Mode is OFF, click on the gray button to turn it on.

5.3.2. National Verifier Mode ON Screenshot

Update Subscriber

National Verifier **ON**

Attention! You are using the National Verifier system. Switch the blue button to OFF to return to the NLAD system.

UPDATE SUBSCRIBER

Instructions

| Subscriber ID ▾ | ▓▓▓▓ | Update Type | Production ▾ | Search |

SAC Number	Phone Number	Subscriber ID	Port Freeze End Date	Anniversary Date
▓▓▓	▓▓▓	▓▓▓	▓▓▓	▓▓▓

Subscriber Personal Information *(Required)*

Last Name *   Date of Birth *   Last 4 SSN *   - OR-   Tribal ID *

First Name *   Middle Name

Subscriber Address *(Required)*

Primary Address *   Mailing Address

Apt, Unit, etc.   Apt, Unit, etc.

City *   State *   ZIP Code *   City   State   ZIP Code

Phone Number *(Required)*

Broadband: Subscriber is provided a Broadband only service that meets the minimum service standards.

Service Type*   ▓▓▓ ▾   Service Initiation Date *   ▓▓▓

Phone Number   ▓▓▓   Service Reverification Date

Lifeline Tribal Benefit? *   ○ Yes   ◉ No

ETC General Use *(Optional)*

☐ **Benefit Qualifying Person** *(Optional)*

Update

5.3.3. National Verifier Mode OFF Screenshot

Update Subscriber

National Verifier ⬤ OFF

Attention! You are using the NLAD system. On ▮▮▮▮▮▮▮▮ all users will be required to use the National Verifier system for this selected SAC.

UPDATE SUBSCRIBER

Instructions

Subscriber ID ▾ [   ]   Update Type [Production ▾]   [Search]

SAC Number	Phone Number	Subscriber ID	Port Freeze End Date	Anniversary Date

Subscriber Personal Information   *(Required)*

Last Name * Date of Birth * Last 4 SSN * - OR- Tribal ID *

First Name * Middle Name

Subscriber Address   *(Required)*

Primary Address * Mailing Address

Apt, Unit, etc. Apt, Unit, etc.

City * State * ZIP Code * City State ZIP Code

Phone Number   *(Required)*

Broadband: Subscriber is provided a Broadband only service that meets the minimum service standards.

Service Type* [Broadband ▾] Service Initiation Date *
Phone Number [   ] Service Reverification Date [   ]
                                Lifeline Tribal Benefit? *   ○ Yes ⦿ No

Subscriber Eligibility Information   *(Required)*

Eligible Program * [Select one ▾]

Independent Economic Household?   ○ Yes ⦿ No   IEH Certification Date [   ]
                                                  IEH Recertification Date [   ]

Tribal Address?   ○ Yes ⦿ No   Linkup Service Date [   ]
Temporary Address?   ○ Yes ⦿ No
Non-Deliverable Rural Address?   ○ Yes ⦿ No

ETC General Use   *(Optional)*

[   ]

☐ **Benefit Qualifying Person**   *(Optional)*

[Update]

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6. Transfer Lifeline Benefits

> This article explains how to transfer an existing Lifeline subscriber's benefits from their previous carrier to yours.
>
> Applies to: *ETC Analyst, ETC Administrator.*

6.1. Transfer Lifeline Benefit Page

From the Transfer Lifeline Benefit page you can enter a subscriber's information and transfer their Lifeline benefits to your ETC. A subscriber's Lifeline benefits can only be transferred if the subscriber is already enrolled in NLAD. When transferring a subscriber, you must enter all of the subscriber's information.

Prior to transferring a subscriber's Lifeline benefits, you can search for the subscriber using the Lookup Subscriber page.

To navigate to the Transfer Lifeline Benefit page, click the **Transfer Lifeline Benefit** link from the Subscriber Management section of the sidebar.

6.1.1. Transfer Lifeline Benefits

NOTE: At any time, you can click <u>Reset</u> at the bottom of the page to clear all fields and reset the form. Required fields are denoted with a red, superscript asterisk (*).

1. Select the appropriate study area code (SAC) from the **Select SAC** drop-down menu (required). The SAC is a six-digit number that associates the Eligible Telecommunications Carrier (ETC) providing the Lifeline benefits to the subscriber.

2. Enter subscriber's information into the Subscriber Name and Personal Information section (required).

    a. Enter the subscriber's last name into the **Last Name** field (required). The Last Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

    b. Enter the subscriber's date of birth into the **Date of Birth** field (required). The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY). For example, 11/13/1956.

    c. Enter the last four digits of the subscriber's social security number in the **Last 4 SSN** field (required). The Last 4 SSN field will only accept four numeric characters.

       NOTE: The subscriber's social security number (SSN) is preferred, but if it is not available, the system will accept the subscriber's Tribal Identification number or Tribal enrollment number (Tribal ID). However, it is not possible to provide both the SSN and the Tribal ID.

    d. Enter the subscriber's Tribal ID into the **Tribal ID** field (only required if SSN is not provided). The Tribal ID field cannot be less than two alphanumeric characters or contain more than 20. This field also accepts the hyphen character (-).
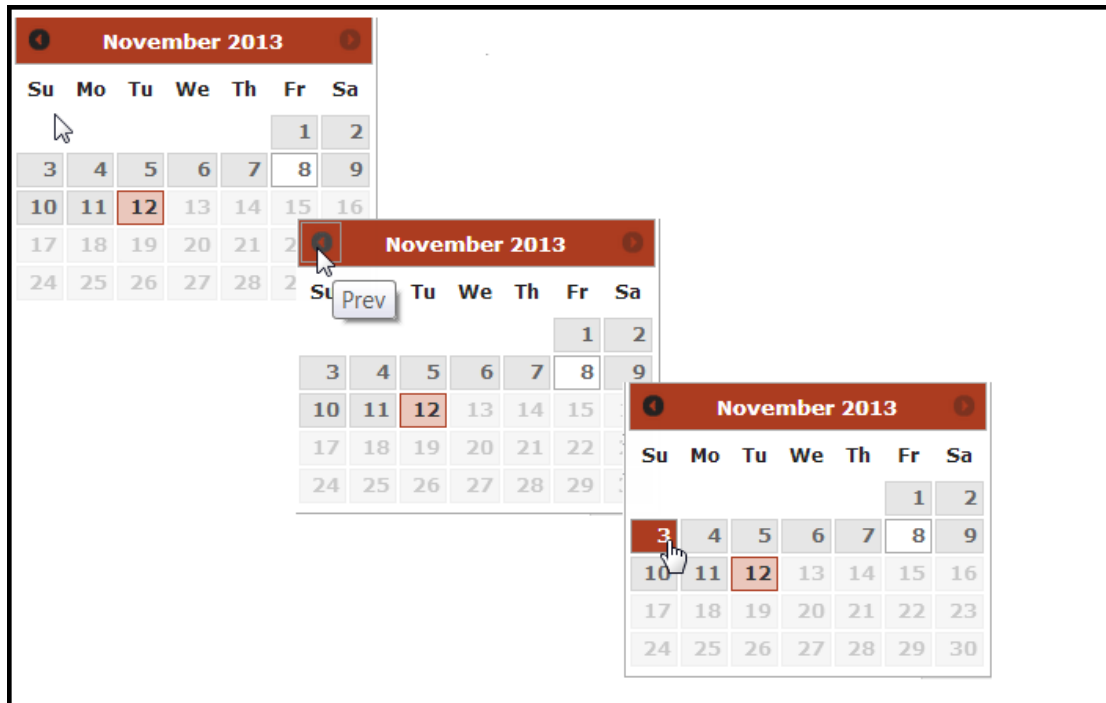
e. Enter the subscriber's first name into the **First Name** field (required). The First Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

f. Enter the subscriber's middle name into the **Middle Name** field (optional). The Middle Name field cannot contain more than 50 alphabetic characters. This field also accepts the period (.) character (so an initial can be entered), the SPACE character, and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

g. Enter the subscriber's phone number into the **Phone Number in NLAD** field (Optional). This is the number currently registered to the user in the NLAD system. The phone number must be exactly 10 numeric-characters long.

3. Enter data into the fields of the Subscriber Address Information section (required).

a. Enter the subscriber's address into the **Primary Address** field (required). The Primary Address field cannot contain more than 50 alphanumeric characters.

b. Enter the subscriber's secondary address information into the **Apt, Unit, etc.** field (optional). This field is used if the subscriber's address contains a secondary descriptor and number. For example, unit #3. The Apt, Unit, etc. field cannot contain more than 50 alphanumeric characters.

c. Enter the subscriber's city in the **City** field (required). The City field cannot contain more than 50 alphabetic characters.

d. Select the subscriber's state from the **State** drop-down menu (required)**.** If the **State** selected is Puerto Rico, an optional **Urbanization Code** field is displayed.

e. Enter the subscriber's ZIP code into the **ZIP** field (required). The ZIP field cannot be less than five numeric characters, and contain no more than nine numeric characters. When entering a nine-digit ZIP code, format the entry with a hyphen after the first, five numeric characters. For example, 90905-4443.

Addresses are validated through the USPS AMS. The AMS system will reformat the address and search the national database for a single matching address. If a match is found, the address will be accepted. If a match is not found, the system will reject the entry with an error message.

4. Enter data into the mailing address section (optional). This section is only used if the subscriber's mailing address is different than their primary address, if the primary address is not a USPS deliverable address (such as a rural address), or if the subscriber receives their mail via Post Office Box (P.O. Box).

a. Enter the subscriber's mailing address into the **Mailing Address** field. The Mailing Address field cannot contain more than 50 alphanumeric characters.

b. Enter the subscriber's secondary address information into the **Apt, Unit, etc.** field (optional). This field is used if the subscriber's address contains a secondary descriptor and number. For example, unit #3. The Apt,Unit,etc. field cannot contain more than 50 alphanumeric characters.

c. Enter the subscriber's city in the **City** field. The City field cannot contain more than 50 alphabetic characters.

d. Select the subscriber's state from the **State** drop-down menu. If the **State** selected is Puerto Rico, an optional **Urbanization Code** field is displayed.

e. Enter the subscriber's ZIP code into the **ZIP** field. The ZIP field cannot be less than five numeric characters, and contain no more than nine numeric characters. When entering a nine-digit ZIP code, format the entry with a hyphen after the first five numeric characters. For example, 90905-4443.

5. Enter data into the Subscriber Telephone Information section (Required to Transfer for all *Service Types* except **Broadband**)

a. Select the subscriber's Service Type (Required) from the **Service Type** drop-down menu. There are 5 service types/plans available to eligible lifeline subscribers:

1) **Voice**: Subscriber is provided a Voice only service that meets the minimum service standards.
2) **Broadband**: Subscriber is provided a Broadband only service that meets the minimum service standards. NOTE: the **Phone Number** field is optional when *Broadband only* service type is selected for **Transfer** transactions.
3) **Bundled - Voice**: Subscriber is provided a Voice and Broadband service that meets the Voice minimum service standards only.
4) **Bundled - Broadband**: Subscriber is provided a Voice and Broadband service that meets the Broadband minimum service standards only.
5) **Bundled - Voice and Broadband**: Subscriber is provided a Voice and Broadband service that meets both the Voice and Broadband minimum service standards.

b. Enter the service initiation date into the **Service Initiation Date** field. The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY). The service initiation date is the date that service providers determine that the subscriber was eligible for Lifeline program supported service. You are not allowed to select a service initiation date that occurs in the future.

Note: You may select the service initiation date from the **Service Initiation Date** calendar widget by clicking the left arrow in the upper-left corner of the widget to select a month, and clicking on the appropriate number for the day. **The Service Initiation Date cannot occur prior to 12/10/1985.**

c. Enter the subscriber's phone number into the **Phone Number** field. The subscriber's telephone number must be exactly ten numeric characters long. For example, 123-555-5555.

d. **Tribal Lifeline Benefit** selection (Required); choose "Yes" or "No" as appropriate from the radio button option. Select "Yes" to claim Lifeline Tribal support for a qualified subscriber to whom Tribal rates are being offered.

6. Enter data into the fields of the Subscriber Eligibility Information section (required).

a. Select the subscriber's appropriate program from the **Eligible Program** drop-down menu (required).
E1- Medicaid
E2- Supplemental Nutrition Assistance Program (Food Stamps or SNAP)
E3- Supplemental Security Income (SSI)
E4- Federal Public Housing Assistance (Section 8)
E8- Bureau of Indian Affairs General Assistance
E9- Tribally- Administered Temporary Assistance to Needy Families (TTANF)
E10- Food Distribution Program on Indian Reservations (FDPIR)
E11- Tribal Head Start
E13- Eligibility Based on Income
E14- Program Eligibility Approved by State Administrator
E15- Veterans Pension or Survivors Pension
E16- State Eligibility Waiver (**NOTE**: Program code should only be used by States that were granted a waiver by the FCC; California, Maryland, Michigan, New York, Utah, Vermont, Washington, Wisconsin)

NOTE: In compliance with the 2016 Lifeline Modernization Order the following Enrollment

Eligibility codes were retired:
E5- Low-Income Home Energy Assistance Program (LIHEAP)
E6- Temporary Assistance to Needy Families (TANF)
E7- National School Lunch Program's Free Lunch Program
E12- State Assistance Programs (If Applicable)

b. Choose "Yes" or "No" (default is "no") as appropriate from the from the radio button options (optional):

   i. **Independent Economic Household** (IEH) -This flag indicates that the subscriber is an independent economic entity sharing an address with another Lifeline subscriber. If this flag is indicated, the ETC must collect and retain an IEH worksheet from the subscriber.

      1. Enter the subscriber's IEH certification date into the **Subscriber IEH Certification Date** field (required if IEH flag is chosen). The IEH certification date is the date that the IEH certification was performed for the subscriber. The subscriber IEH certification date field should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY). as a two-digit month, a two-digit day and a four-digit year (MM/DD/YYYY).

         Note: You may select the subscriber's IEH Certification date from the Subscriber IEH Certification Date calendar widget by clicking the left arrow in the upper left corner of the widget to select a month and clicking on the appropriate number for the day.

   ii. **Tribal Address** - This flag indicates that the subscriber's address is in Tribal lands and is not registered with the USPS address matching service (AMS). If Tribal Address is selected, you cannot select Temporary Address or Rural Address.

      1. If the subscriber's Tribal Address radio button is set to "Yes", enter the Linkup Service Date into the **Linkup Service Date** field. The Linkup Service Date field should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY).

         Note: You can also select the subscriber's Linkup Service date from the Linkup Service Date calendar widget by clicking the left arrow in the upper-left corner of the widget to select a month and clicking on the appropriate number for the day. The Link Up Service date is the date Link Up Service started. **In order to have a date in the Linkup Service Date, the Tribal Address radio button must be set to "Yes".**

   iii. **Temporary Address** - This flag indicates that the primary address entered is a temporary location. If Temporary Address is selected, you cannot select Tribal Address or Rural Address.
       Note: If temporary address is set to "no," it indicates that the primary address is a permanent location.

   iv. **Non-Deliverable Rural Address** - This flag indicates that the subscriber's primary address is in a rural area, and is not registered with AMS, nor able to receive postal

delivery. If Rural Address is selected, you cannot select Tribal Address, or Temporary Address.

7. Enter information into the **ETC General Use** field (optional). You may populate the ETC General Use field with any value, and it will be returned along with other transaction error messages. For example, you could enter a unique identifier in this field that will allow automation of the subscriber-lookup process within your own database when a transaction fails. The ETC General Use field accepts a maximum of 50 alphanumeric characters, the SPACE character, and the following special characters: period (.) , hyphen (-), underscore (_), colon (:), pound (#), and at sign (@).

8. Enter data into **Benefit Qualifying Person Information** section (optional). The benefit qualifying person (BQP) is the person who provides eligibility for Lifeline benefits to a Lifeline subscriber when the subscriber does not qualify. Typically, this person qualifies for Lifeline benefits, but cannot subscribe to a carrier on their own, and is a dependent of the subscriber.

    a. To open the Benefit Qualifying Person section, click the **Benefit Qualifying Person** title bar. You should see an extension to the enrollment form:

    b. Enter the BQP's last name into the **Last Name** field (required). The last name cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

    c. Enter the BQP's date of birth into the **Date of Birth** field (required). The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY). For example, 11/13/1956.

    d. Enter the last four digits of the BQP's social security number into the **Last 4 SSN** field (required). The Last 4 SSN field will only accept four numeric characters. Note: The BQP's social security number (SSN) is preferred but if it is not available, the system will accept the BQP's Tribal Identification number or Tribal Enrollment number (Tribal ID). However, it is not possible to provide both the SSN and the Tribal ID.

    e. Enter the BQP's Tribal ID into the **Tribal ID** field (required). When entering the BQP's Tribal ID you may enter the first two characters, last four, or the entire Tribal ID. The Tribal ID field cannot contain more than 20 alphanumeric characters. This field also accepts the hyphen character (-).

    f. Enter the BQP's first name into the **First Name** field (required). The first name cannot contain more than 50 alphabetic characters. This field accepts the following special characters: the apostrophe ('), the grave accent (`), and the hyphen (-).

g. Enter the BQP's middle name into the **Middle Name** field (optional). The Middle Name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

9. Click <u>**T**</u>**ransfer Benefit** to complete the transfer.

6.1.1.1. Successful Transfer

Upon successful transfer, you will be taken to the Transaction Successful page, where you will see a success message, followed by a read-only display of the transfer details. The system then generates two email messages, one of which goes to the designated contact of the ETC losing the subscriber, and another to the designated contact of the ETC receiving the subscriber.

NOTE: For successful Transfer transactions, each subscriber is assigned a **Subscriber ID.**

The **Subscriber ID** is a NLAD system-generated unique identifier (9 Characters/ Alphanumeric) that ETCs

can use in lieu of a phone number to query a subscriber's information. ETCs can perform Update and De-enroll transactions with the Subscriber ID.

6.1.1.2. Unsuccessful Transfer

If a transfer is not successful, the system will display the relevant error messages at the top of the page. When applicable, the system may also provide a resolution ID.

NOTE: For Unsuccessful Transfer transactions, a **Subscriber ID** will NOT be automatically generated. ETCs will first have to resolve the transaction failure(s) to obtain their subscriber's Subscriber ID.

If a resolution request is submitted and approved, ETCs should review their NLAD Reports (*Detail Active Subscriber Report*, *Detail Transaction Report*, or *Summary and Detail Subscriber Snapshot Report)* to retrieve their subscriber's Subscriber ID.

6.2. Transfer Lifeline Benefit Page Screenshot

6.3. Transfer Lifeline Benefit Page - National Verifier Mode

6.3.1. National Verifier Mode Toggle Button

For states who are using the National Verifier, there is a blue toggle button displayed at the top of the Transfer Lifeline Benefit page which can turn on NLAD into National Verifier Mode. When NLAD is in National Verifier Mode, subscribers who are transferred will have their eligibility checked in the National Verifier. During the soft launch period, SACs in National Verifier states will be defaulted to National Verifier Mode but the user will still be able to turn off National Verifier Mode. After the hard launch, NLAD will be permanently in National Verifier Mode for all Transfer transactions.

When the National Verifier Mode is ON, the Subscriber Eligibility Information section containing the following fields will not be displayed and cannot be edited:

- Eligible Program

- Independent Economic Household?

- IEH Certification Date

- Tribal Address?

- Linkup Service Date

- Temporary Address?

- Non-Deliverable Rural Address?

To turn on/off National Verifier Mode:

1. Navigate to the top of the Transfer Lifeline Benefit page and locate the National Verifier button in the top right corner, just underneath the "LOG OUT" option.

2. If National Verifier Mode is ON, click on the blue button to turn it off.

3. If National Verifier Mode is OFF, click on the gray button to turn it on.

6.3.2. National Verifier Mode ON Screenshot

Transfer LifeLine Benefit

National Verifier **ON** ⬤

Attention! You are using the National Verifier system. Switch the blue button to OFF to return to the NLAD system.

TRANSFER LIFELINE BENEFIT

Instructions

Select SAC*

[____▼]

Subscriber Personal Information *(Required)*

Last Name *	Date of Birth *	Last 4 SSN *	- OR-	Tribal ID *
[____]	[____]	[____]		[____]

First Name *	Middle Name	Phone Number in NLAD
[____]	[____]	[____]

Subscriber Address *(Required)*

Primary Address *   Mailing Address
[_____]   [_____]

Apt, Unit, etc.   Apt, Unit, etc.
[_____]   [_____]

City *	State *	ZIP Code *	City	State	ZIP Code
[____]	[__▼]	[____]	[____]	[__▼]	[____]

Subscriber Telephone Information *(Required)*

Service Type*	Select one ▼	Service Initiation Date *	[____]
Phone Number *	[____]	Lifeline Tribal Benefit? *	◉ Yes ◉ No

ETC General Use *(Optional)*

[_____]

☐ **Benefit Qualifying Person** *(Optional)*

[Reset]   [Transfer Benefit]

6.3.3. National Verifier Mode OFF Screenshot

Transfer LifeLine Benefit

National Verifier   OFF

Attention! You are using the NLAD system. On ▓▓▓▓▓▓▓▓ all users will be required to use the National Verifier system for this selected SAC.

TRANSFER LIFELINE BENEFIT

Instructions

Select SAC*

▓▓▓▓▓ ▾

Subscriber Personal Information   (Required)

Last Name *	Date of Birth *	Last 4 SSN * - OR- Tribal ID *

First Name *	Middle Name	Phone Number in NLAD

Subscriber Address   (Required)

Primary Address *   Mailing Address

Apt, Unit, etc.   Apt, Unit, etc.

City *	State *	ZIP Code *	City	State	ZIP Code
	▾			▾	

Subscriber Telephone Information   (Required)

Service Type*   Select one ▾   Service Initiation Date *

Phone Number *   Lifeline Tribal Benefit? *   ◯ Yes   ◯ No

Subscriber Eligibility Information   (Required)

Eligible Program *   Select one ▾

Independent Economic Household?   ◯ Yes ⦿ No   IEH Certification Date

Tribal Address?   ◯ Yes ⦿ No   Linkup Service Date

Temporary Address?   ◯ Yes ⦿ No

Non-Deliverable Rural Address?   ◯ Yes ⦿ No

ETC General Use   (Optional)

☐ **Benefit Qualifying Person**   (Optional)

Reset   Transfer Benefit

7. De-Enroll Subscriber

This article explains how to de-enroll a subscriber from NLAD.

Applies to: *ETC Analyst, ETC Administrator.*

7.1. De-Enroll Subscriber Page

From the De-Enroll Subscriber page, you can search for a subscriber using their **Phone Number** or **Subscriber ID**, and de-enroll them from NLAD Production or NLAD Duplicate Resolution.

To navigate to the De-Enroll Subscriber page, click the **De-Enroll Subscriber** link from the Subscriber Management section of the sidebar.

7.1.1. De-Enroll Subscriber

1. From the drop-down menu, select a search field (required).

    a. If the **Phone Number** field is selected, enter the subscriber's Phone Number.

    b. If the **Subscriber ID** field is selected, enter the subscriber's Subscriber ID.

2. Select the status of the subscriber in the **De-enroll Type** drop-down menu (required).

    a. Select **Production** if the subscriber is an active subscriber in NLAD.

    b. Select **Duplicate Resolution** if the subscriber is in the duplicate resolution process. NOTE: The **Subscriber ID** cannot be used to De-enroll subscribers in Duplicate Resolution.

3. Click <u>Search</u>.

    a. If no valid match was found, the appropriate error message will be displayed.

        i. **Subscriber Not Found:** The subscriber does not exist in NLAD Production or NLAD Duplicate Resolution

        ii. **This request cannot be processed. This state is currently in the NLAD Duplicate Subscriber Resolution Process:** The subscriber is undergoing Track 1 or Track 2 Duplicate Resolution and cannot be de-enrolled.

        iii. **This request cannot be processed. Please e-mail NLAD Support at NLADsupport@usac.org:** A request must be sent to NLADSupport@usac.org due to more than one subscriber sharing the same phone number.

        iv. **This subscriber is currently undergoing duplicate resolution processing:** The subscriber is undergoing duplicate resolution and cannot be de-enrolled.

    b. If a matching subscriber is found, the subscriber's personal information will be displayed for your review.

4. Verify the subscriber's record returned is the correct subscriber.

   a. Any subscriber in **Production** can be de-enrolled.

   b. Only a subscriber in **Track 1 or Track 2 Duplicate Resolution** can be de-enrolled during the state's window to de-enroll.

5. Select the reason for the subscriber's de-enrollment from the **Reason for De-Enrollment** drop-down menu (required). The available options are:

   a. De-Enroll Deceased - when a Lifeline subscriber has deceased.

   b. De-Enroll Failed Recertification - when a Lifeline subscriber has not filed their annual recertification.

   c. De-Enroll Leaving - when a Lifeline subscriber opts out of the program, or is no longer eligible for benefits.

   d. De-Enroll Non-Usage - when a Lifeline subscriber has not used their benefits for 60 days.

6. Select a date from the **Effective Date** calendar (required). The effective date is the date that de-enrollment of the subscriber occurs with the ETC, and marks the last day of the subscriber's enrollment in the Lifeline program. The effective date should be entered as a two-digit month, two-digit day and a four-digit year (MM-DD-YYYY).

7. Click **De-Enroll** to complete the process.

7.2. De-Enroll Subscriber Page Screenshot

8. Submit Resolution Request

This article explains how to submit a resolution request to NLAD Customer Service (NCS) through the NLAD portal, and how to check on the status of a submitted resolution request.

Applies to: *ETC Administrator, ETC Analyst, and ETC Operations.*

8.1. Submit Resolution Request Page

From the Submit Resolution Request page, you can look up a rejected transaction by its resolution ID to submit a resolution request for review and potential override. Entering a resolution ID for an already-submitted resolution request will return that request's details and current status.

To navigate to the Submit Resolution Request page, click the **Submit Resolution Request** link in the Subscriber Management section of the sidebar.

8.1.1. Submit a Resolution Request

1. Enter the resolution ID into the **Resolution ID** field.

2. Click <u>S</u>earch. If a corresponding transaction is found, the transaction details will be displayed in the **Transaction Information** section.

3. Review the transaction information.

4. If you want to resubmit the transaction instead of submitting a resolution request, you can click **<u>M</u>odify Subscriber Data**, which will take you to the Enroll Subscriber page or the Update subscriber page (depending on the transaction type), pre-populated with all of the transaction details. Otherwise, continue to <u>step 5</u>.

5. Provide the details for all required fields to resolve the transaction. Please refer to the <u>Dispute Resolution</u> page for more information on how to complete a valid resolution request.

   a. Enter the agent name and/or ID who reviewed the subscriber's information.

   b. Select the resolution code(s) that correspond with the documentation used to verify subscriber's information.

   c. Add a description explaining why the rejection was an error (optional).

   d. Check the certification box.

6. Click **<u>S</u>ubmit Resolution Request to NLAD Customer Service**.

TRANSACTION UNSUCCESSFUL

Instructions

Subscriber Error(s):
- Address unrecognized (failed Address Matching Service).
- Transfers within 60 days of the previous service-initiation date are prohibited., Date eligible for transfer: 01/10/2017

Transaction Information

Resolution ID	
Transaction Type	TRANSFER
Error Message	INVALID_ADDRESS, CANNOT_TRANSFER_WITHIN_60_DAYS
Resolution Status	This resolution request has not been submitted to NCS

[Modify Subscriber Data]

SAC Number   **Phone Number**

Subscriber Personal Information

Last Name	Date of Birth	Last 4 SSN	Tribal ID	Lifeline Tribal Benefit

First Name	Middle Name

Subscriber Address

Primary Address	Mailing Address

Additional Subscriber Information

Service Type	VOICE	Lifeline Tribal Benefit	
Eligible Program		Service Initiation Date	
Independent Economic HouseHold?		Service Reverification Date	
Tribal Address?		IEH Certification Date	
Temporary Address?		IEH Recertification Date	
Non-Deliverable Rural Address?		Linkup Service Date	

ETC General Use

Benefit Qualifying Person

Last Name	Date of Birth	Last 4 SSN	Tribal ID
First Name	Middle Name		

Agent who reviewed the subscriber's information:*

Agent's Name: [   ]   **And/Or**   Agent's ID: [   ]

Select documentation used to verify the subscriber's information (More Information)

Address Resolution Code:*
I have confirmed the Subscriber's Address by reviewing the following verification documentation: [▼]

Port Freeze Exception Resolution Code:*
I am submitting the request for the port freeze with the following exception code: [▼]

Resolution Request Description   *(max 1000 chars)*

[   ]

☐ I certify that my submission of data to the National Lifeline Accountability Database is accurate to the best of my knowledge and any willful false statements made may subject me to federal criminal prosecution and

8.1.2. Check Resolution Request Status

1. Enter the resolution ID of an already-submitted resolution request into the **Resolution ID** field.

2. Click **Search**. If a corresponding resolution request is found, the resolution status and transaction details will be displayed in the **Transaction Information** section.

The resolution status block, above the transaction details, will include:

- **Resolution ID** - The resolution ID of the request.

- **Transaction Type** - The type of transaction associated with the resolution ID.

- **Error Message** - The error code or the rejected the transaction.

- **Resolution Status** - The status of the resolution request. The possible statuses are:

  - OPEN - The case has been created for the resolution request.

  - IN_PROGRESS - The case is currently being processed.

  - CLOSED_ACCEPTED - The resolution request has been approved.

  - CLOSED_REJECTED - The resolution request has been rejected.

8.2. Submit Resolution Request Page Screenshot

9. Upload Subscriber File

> This article explains how to prepare a batch file that contains multiple transactions, and how to use the Upload File page to upload a batch file, check on the status, and receive the results.
>
> Applies to: *ETC Analyst, ETC Administrator.*

9.1. Upload File Page

From the Upload File page, you may submit batch files to NLAD, which contain multiple transactions as separate rows in the file. You may also check on the status of your previously submitted batch files, and download the results of failed transactions for review and correction.

To navigate to the Upload File page, click on the **Upload Subscriber File** link in the Subscriber Management section of the sidebar.

9.1.1. Prepare Batch File

The file format for batch submissions is comma-separated values (CSV), where each row of the file is a separate transaction. Each row of the batch file is processed individually in the order it appears, from top to bottom. You may obtain a blank input template from USAC at this address:
http://www.usac.org/_res/documents/li/xls/nlad/NLAD-Input-Template.csv

For full descriptions of all input fields, including restrictions and requirement status, download the Field Descriptions spreadsheet from USAC at this address:
http://www.usac.org/_res/documents/li/pdf/nlad/NLAD-Field-Descriptions.pdf. A PDF version can also be downloaded by clicking the **NLAD Input Template** link from the Reports and Tools section of the sidebar.

The batch file name must start with the six-digit SAC number, and end with a .csv extension. You may append additional alphanumeric characters to the file name for your own reference, but you must compose the file name in this format: six-digit SAC number, hyphen, then up to 44 alphanumeric characters of your choice; for example, **999999-batch_99_NOV.csv**. The file name cannot contain the space character, or any of the following characters: \ / : * ? " < > |

During initialization, the only available transaction type is "enroll," and all transactions within the batch file must have the same SAC number, which must correspond to the SAC number in the file name. During production, batch files may include mixed transaction types and SAC numbers.

9.1.2. Upload Batch File

1. Click **Choose File** to launch your browser's file explorer.

2. Select the file to upload, then click **Open** to load the selected file.

3. Once a file has been loaded, click **Upload.**

The selected file name should be displayed on the page.

9.1.3. Retrieve Batch Status and Feedback

The status and feedback of uploaded batch files is displayed in the Uploaded Files table. Refresh your browser to update the results. Results from small files will become available faster than the results from larger files. You do not need to remain logged in to keep a batch file processing; once uploaded, you may log out and return to the site at a later time to view the batch results.

9.1.3.1. Successful Upload

If the file has uploaded successfully, you will be notified at the top of the page with a success message. The status of each uploaded file can be viewed as a row in the Uploaded Files table.

The status and feedback information is presented for the most recently uploaded subscriber files, with response information for the most recent batch in the top row. No more than one entry will display for each batch file name. If you submit a batch file with the same name as a previous batch file, it will replace the corresponding row in the Uploaded Files table.

The status and feedback information is displayed under the following column headings on the page:

- **SAC-Filename** – The name of the batch file.

- **User Name** – The name of the submitting user.

- **Submitted Date** – The date and time the file was submitted.

- **Rows Processed** – The total number of rows processed.

- **Status** – The status of the batch file. Possible statuses are: Success, Rejected, Row Errors, or In Progress.

- **Submitted** – The number of transactions the batch file contained.

- **Rejected** – The number of transactions that were rejected.

- **Errors** – This will contain either the reason why the file was rejected entirely, or a link to a CSV file that will contain the rejection information for every rejected transaction in the batch (if any).

The rejected-rows file is a CSV file that provides information about any failed transactions. NLAD will compose the rejected-rows filename with these elements: batch ID, the word "rejected", and the original filename (for example, **1250-rejected-999999-122013batch.csv**). This file contains the following information for each transaction rejected by the system:

- **Batch Row Number** – The row number corresponding to the rejected transaction.

- **Phone Number** – The subscriber's phone number.

- **ETC General Use** – The ETC general use value.

- **Field Name** – The name of the field containing the offending data.

- **MSG_Code** – The message code associated with the rejection reason.

- **Error Message** – The full error message describing the rejection reason.

- **Error Data** – The offending data.

- **Resolution ID** – The resolution ID number assigned to the rejection (when applicable).

9.1.3.2. Unsuccessful Upload

If the file does not upload successfully, the system will generate an error message.

If the file type or file name is incorrect or invalid, the system will generate a message informing you that the file upload was not successful and the reason why. Typical error messages are:

- File not csv.

- File name cannot have spaces.

- File name less than 6 characters.

- Not authorized to upload that SAC.

- SAC does not exist or is not 6 digits.

9.2. Upload File Page Screenshot

10. Lookup Subscriber

This article explains how to use the Lookup Subscriber page to determine if a potential subscriber and their address is already in NLAD.

Applicable Roles: *ETC Administrator, ETC Analyst, ETC Operations.*

10.1. Lookup Subscriber Page

From the Lookup Subscriber page, you can provide subscriber information and search NLAD to see if there are any NLAD subscribers with matching identity or address information in NLAD.

To navigate to the Lookup Subscriber page, click the **Lookup Subscriber** link in the Subscriber Management section of the sidebar.

10.1.1. Lookup Subscriber

NOTE: Required fields are denoted by a superscript red asterisk (*).

1. Enter subscriber's information into the Subscriber Name and Personal Information section (required).

    a. Enter the subscriber's last name into the **Last Name** field (required). The last name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

    b. Enter the subscriber's date of birth into the **Date of Birth** field (required). The date should be entered as a two-digit month, two-digit day, and four-digit year (MM/DD/YYYY).

    c. Enter the last four digits of the subscriber's social security number in the **Last 4 SSN** field (required). The Last 4 SSN field will only accept four numeric characters.
    NOTE: The subscriber's social security number (SSN) is preferred, but if it is not available, the system will accept the subscriber's Tribal Identification number or Tribal enrollment number (Tribal ID). In the event that a subscriber is in possession of a valid SSN and Tribal ID, the system will accept both entries.

    d. Enter the subscriber's Tribal ID into the **Tribal ID** field (only required if SSN is not provided). The Tribal ID field cannot contain less than two alphanumeric characters or more than 20. This field also accepts the hyphen character (-).

    e. Enter the subscriber's first name into the **First Name** field (optional). The first name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

    f. Enter the subscriber's middle name into the **Middle Name** field (optional). The middle name field cannot contain more than 50 alphabetic characters. This field also accepts the SPACE character and the following special characters: apostrophe ('), grave accent (`), and hyphen (-).

2. Enter data into the fields of the Subscriber Address Information section.

a. Enter the subscriber's address into the **Primary Address** field (required). The Primary Address field cannot contain more than 50 alphanumeric characters.

b. Enter the subscriber's secondary address information into the **Apt, Unit, etc.** field (optional). This field is used if the subscriber's address contains a secondary descriptor and number. For example, unit #3. The Apt, Unit, etc. field cannot contain more than 50 alphanumeric characters.

c. Enter the subscriber's city in the **City** field (required). The City field cannot contain more than 50 alphabetic characters.

d. Select the subscriber's state from the **State** drop-down menu (required)**.** If the **State** selected is Puerto Rico, an optional **Urbanization Code** field is displayed.

e. Enter the subscriber's ZIP code into the **ZIP** field (required). The ZIP field cannot contain less than five numeric characters, and no more than nine numeric characters. When entering a nine-digit ZIP code, format the entry with a hyphen after the first five numeric characters.

3. Click **Search**.

Addresses are validated through the AMS. Upon validation, the AMS system will reformat the address and search the national database for a single, matching address. If a match is found, the address will be accepted. If a match is not found, the system will reject the entry with an error message.

10.1.1.1. Successful Search
The search will look for a matching phone number, address, or subscriber ID, and return any matches in the Search Results section.
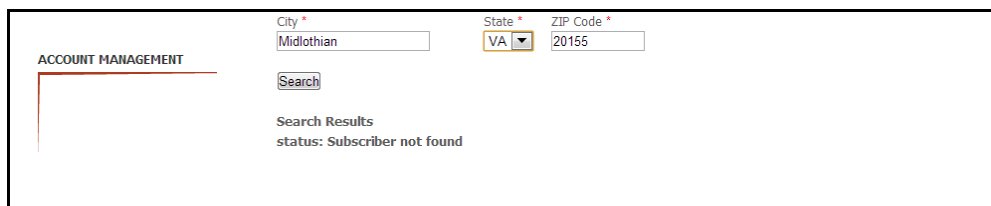
10.1.1.2. Unsuccessful Search
If the search finds no matches at all, the system will display "Subscriber not found."

10.2. Lookup Subscriber Page Screenshot

USAC
Universal Service Administrative Company

LIFELINE   LOG OUT

USAC Home | Lifeline Program | NLAD | Lookup Subscriber

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 NLAD Subaccounts
Create NLAD Subaccount
Create ETC API Account
Change Password

REPORTS AND TOOLS

Reports
User Guide
API Specification
NLAD Input Template
NLAD Access Agreement
Training Videos

LOOKUP SUBSCRIBER

Instructions

Subscriber Name and Personal Information

| Last Name * | Date of Birth * | Last 4 SSN * | - OR- | Tribal ID * |
| | MM/DD/YYYY | | | |

| First Name | Middle Name |
| | |

Subscriber Address Information

Primary Address *

Apt, Unit, etc.

| City * | State * | ZIP Code * |
| | AK ▼ | |

Search

Search Results

11. 497 Officer Homepage

This article explains how the ETC's E-File FCC Form 497 Officer can create and manage an ETC Administrator account.

Applies to: *497 Officer.*

11.1. 497 Officer Homepage

From the 497 Officer Homepage you can promote an existing NLAD account to ETC Administrator or create a new ETC Administrator account. You can also manage ETC Administrator accounts, which includes updating an account's information, resetting an account's password, and deactivating an account. An ETC Administrator has access to functions that allow them to manage the NLAD Access Portal and NLAD API accounts for their ETC.

When creating an ETC Administrator account, you may select which of your service provider identification numbers (SPINs) you would like to bestow upon the new account. The SPINs for your 497 Officer account are listed below the entitlements table, in the section **Update ETC Admin SPIN Permissions**. If you do not see any SPINs, or you do not see the appropriate SPINs/number of SPINs, contact NLAD Customer Support at NLADsupport@usac.org.

To navigate to the 497 Officer Homepage, click the **497 Officer Home Page** link from the **Account Management** section of the sidebar.

11.1.1. Assign/Create an ETC Administrator
NOTE: Required fields are denoted by a superscript red asterisk (*).

1. Select the SPIN you wish to assign an Administrator to from the **Update ETC Admin SPIN Permissions** table.

2. Select either the **Assign to Existing ETC Administrator** button or the **Assign to New ETC Administrator** button, according to whether the Administrator is existing or new.

3. Enter the email address for the account you want to set as the ETC Administrator in the **Email Address** and the **Confirm Email Address** fields (required).

4. Click **Search** to locate the account information. If an account with that email address is found, another button beneath Search will appear. You will be asked if you would like to assign that user as the ETC Administrator. If no account with that email address is found, you will receive an error stating the existing account is not found, and you should attempt to create a new ETC Administrator as described in step 6 below.

5. Click **Submit** to assign that account as your ETC Administrator. You will receive a confirmation message that the account has been assigned as your ETC Administrator. Skip to step 10.

6. If no matching account was found, or if you wish to create a new ETC Administrator, you will need to select the **Assign to New ETC Administrator** button and enter the user's email address in the **Email Address** and **Confirm Email Address** fields.

7. Click Search. If a an account with that email is found, you will receive an error stating that an existing account is found an you should assign to an existing ETC Administrator as described in step 2 above.

If no account is found with that email, enter the new user's account information into the the Authorized ETC Administrator Information section.

    a. Enter the user's first name into the **First Name** field (required).

    b. Enter the user's last name into the **Last Name** field (required).

    c. Enter the user's phone number into the **Phone Number** field (required). The telephone number must be exactly ten, numeric-characters long.

8. Enter the relevant company information in the ETC Information section.

    a. Enter the company's street address in the **Company Physical Address** fields (required).

    b. Enter the company's city in the **City** field (required).

    c. Select the company's state from the **State** drop-down menu (required).

    d. Enter the company's ZIP code in the **ZIP Code** field (required).

9. Click **Create** to create the ETC Administrator account.

10. Your ETC Administrator account has now been assigned. Click the **497 Office Home Page** link from the **Account Management** section of the sidebar to see your administrator listed in the ETC Administrator Entitlements table.

Note: If you attempt to re-assign a SPIN to an existing or new Administrator and taking that action will remove all SPIN entitlements from the current ETC Administrator, you will receive an error alerting you that the existing Administrator's account will be automatically deactivated.

11.1.2. Manage NLAD Account

If you have an ETC Administrator created/associated with your account, you will see them listed in the ETC Administrator Entitlements table.

Click **Edit** next to the ETC Administrator account you wish to change to be taken to the Update ETC Administrator Account page. You can also select the **ETC Administrator Home Page** button from the **Account Management** section of the sidebar.

11.2. 497 Officer Home Page Screenshot

497 OFFICER HOME PAGE

ACCOUNT MANAGEMENT

497 Officer Home Page
Change Password

Instructions

ETC Administrator Entitlements

	User ID	Last Name ⬆	First Name	Phone Number	Role
Edit					
Edit					
Edit					
Edit					
Edit					
Edit					
Edit					
Edit					

Update ETC Admin SPIN Permissions

	SPIN	Currently assigned
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		

[Assign to Myself] [Assign to Existing ETC Administrator] [Assign to New ETC Administrator]

12. Update ETC Administrator Account

This article explains how a 497 Officer can update, deactivate, or reset the password of any ETC Administrator account they create.

Applies to: *497 Officer*.

Update ETC Administrator Account Page

From the Update ETC Administrator Account Page you can update, deactivate, and/or reset the password of the selected ETC Administrator.

You can only arrive at the Update ETC Administrator Account Page page through the 497 Officer Home Page.

12.1. Update

You can modify the user's information in the **Authorized NLAD User Information** section, or the carrier's information in the **ETC Information** section.

Click **Update** to commit those changes.

12.2. Reset Password

You can reset the password of any ETC Administrator account by clicking **Reset Password**.

A confirmation email will be sent to the user's email address with a temporary password.

12.3. Deactivate Subaccount

Click **Deactivate** to deactivate the subaccount.

12.4. Update ETC Administrator Account Page Screenshot

USAC
Universal Service Administrative Company

LIFELINE   LOG OUT

USAC Home | Lifeline Program | NLAD | Update ETC Administrator Account

ACCOUNT MANAGEMENT

497 Officer Home Page
Change Password

UPDATE ETC ADMINISTRATOR ACCOUNT

Instructions

Authorized NLAD User Information

Email Address   tigerdragon@mischa.com

First Name*   Last Name*

Phone Number*

ETC Information

Company Physical Address *

City *   State *   ZIP Code *

Subaccount Role

NLAD Role ETC Admin

[Update]   [Reset Password]   [Deactivate]

Subaccount Permissions

SPIN

13. ETC Administration

This article explains how to use the ETC Administrator home page to update SAC information for all SACs that pertain to that administrator.

Applies to: *ETC Administrator*

13.1. ETC Administrator Home Page

From the ETC Administrator home page, you can change SAC information for SACs that pertain to your account, including Marketing Name, Customer Service Number, and the rates for Lifeline and Lifeline Tribal benefits. This page contains an editable table listing all the SACs associated with your account. If you do not see anything listed in the table, contact the appropriate 497 Officer.

To navigate to the ETC Administrator home page, click the **ETC Administrator Home Page** link from the **Account Management** section of the sidebar.

13.1.1. Maintain SAC Information

NOTE: All fields in the table must contain values before you can apply any updates.

To edit a field, double click on the cell you want to update.

1. Enter SAC level information into the Maintain SAC Information section. When you make a change to a particular row, the SAC number in that row will be **bolded** until you apply those changes.

    a. Enter the company's Marketing Name into the **Marketing Name** field and press the "Enter" key on the keyboard. Cannot contain more than 64 characters.

    b. Enter the company's Lifeline Customer Service Phone Number into the **Lifeline Customer Service Phone Number** field and press the "Enter" key on the keyboard. Must be exactly 10 numeric characters.

    c. Enter the dollar amount of the Lifeline benefit rate per subscriber into the **Lifeline Benefit Rate** field. Default value is 9.25 and press the "Enter" key on the keyboard.

    d. Enter the dollar amount of the Lifeline Tribal benefit rate per subscriber into the **Lifeline Tribal Benefits Rate** field and press the "Enter" key on the keyboard. Default value is 0.00.

2. Click **Update**.

13.2. ETC Administrator Home Page Screenshot

14. Create NAP Subaccount

> This article explains how to create ETC Operations, ETC Analyst, and ETC Agent subaccounts in NLAD.
>
> Applies to: *ETC Administrator*.

14.1. Create NLAD Subaccount Page

From the Create NLAD Subaccount Page, you can create ETC Operations, ETC Analyst, and ETC Agent accounts. An ETC Operations account can query subscriber data, create and view reports, and submit resolution requests. An ETC Analyst account can perform subscriber transactions, as well as query subscriber data, create and view reports, and submit resolution requests. ETC Agent and ETC Operations accounts can also perform transactions in the National Verifier. An ETC Agent account is only able to perform transactions in the National Verifier.

After providing a valid email address for the new account, you will be able to select which of your SPINs the account will have permission to. The SPINs your ETC Administrator account has permission to are listed in the section called "Subaccount Permissions." You can select and un-select the SPINs to configure the account's permissions. If you do not see any SPINs, or you do not see the appropriate SPINs/number of SPINs, contact NLAD Support at NLADsupport@usac.org.

Note: when an ETC Administrator's account is deactivated, all associated subaccounts will be automatically assigned to the SPIN's 497 Officer until the 497 Officer assigns a new Administrator. When a new Administrator is assigned, the subaccounts will automatically transfer.

To navigate to the Create NLAD Subaccount Page, click the **Create NLAD Subaccount** link from the Account Management section of the sidebar.

14.1.1. Assign/Create a Subaccount

NOTE: Required fields are denoted by a superscript red asterisk (*).

1. Enter user's email address into the **Email Address** and the **Confirm Email Address** fields (required).

2. Click **Search** to locate the user information. If an account is found matching that email address, skip to step 4.

3. If no matching account was found, blank fields will appear below for you to enter the new user's information.

    a. Enter the user's first name into the **First Name** field (required).

    b. Enter the user's last name into the **Last Name** field (required).

    c. Enter the user's phone number into the **Phone Number** field (required). The telephone number must be exactly ten, numeric-characters long.

4. Select the desired role for the account from the **NLAD Role** drop-down menu.

5. Select the SPINs you wish to give the subaccount permission to from the **Subaccount Permissions** table.

6. Click **Submit**.

At any point after searching for an email address, you can click **Cancel** to clear all fields and reset the form.

To view or manage subaccounts created this way, click **Manage NLAD Subaccounts** from the Account Management section of the sidebar.

14.2. Create NLAD Subaccount Page Screenshot

15. Create ETC API Account

This article explains how to create Application Programming Interface (API) accounts in NLAD.

Applicable Roles: *ETC Administrator*.

15.1. Create ETC API Account Page

From the Create ETC API Account page you can create an ETC API account.

All SPINs associated with your ETC Administrator account will be bestowed to any ETC API account you create from this page. The SPINs for your ETC Administrator account are listed in the SPIN Permissions section. If you do not see any SPINs, or you do not see the appropriate SPINs/number of SPINs, contact NLAD Support at NLADsupport@usac.org.

To navigate to the Create ETC API Account page, click the **Create ETC API Account** link from the Account Management section of the sidebar.

15.1.1. Create an ETC API Account

NOTE: At any point, you may click **Reset** to reset the personal information fields (the email address will remain). Required fields are denoted by a superscript red asterisk (*).

1. Enter the technical contact's email address into the **Email Address** field (required).

2. Enter the technical contact's first name into the **First Name** field (required).

3. Enter the technical contact's last name into the **Last Name** field (required).

4. Enter the technical contact's company name into the **Company Name** field (required).

5. Enter the technical contact's company address into the **Company Address** field (first line required).

6. Enter the technical contact's company city into the **City** field (required).

7. Enter the technical contact's company state into the **State** field (required).

8. Enter the technical contact's company ZIP code into the **ZIP Code** field (required).

9. Enter the technical contact's phone number into the **Phone Number** field (required).

10. Click **Create** to create the ETC API account.

To view or manage ETC API accounts created this way, click **Manage NLAD Subaccounts** from the Account Management section of the sidebar.

Take note of the API ID and API Key. You will not have another opportunity to record this information.

15.2. Create ETC API Account Page Screenshot

16. Manage NLAD Subaccounts

This article explains how the ETC Administrator can use the Manage NLAD Subaccounts page to create and update subaccounts.

Applies to: *ETC Administrator*.

16.1. Manage NLAD Subaccount Page

From the Manage NLAD Subaccount page, you can search for specific users or API accounts, view all ETC Operations, ETC Analyst, ETC Agent, and ETC API accounts you have assigned/created, deactivate accounts, or reset the password for ETC Analyst, ETC Operations, and ETC Agent accounts.

To navigate to the Manage NLAD Subaccount page, click the **Manage NLAD Subaccount** link from the **Account Management** section of the sidebar.

16.1.1. Update NLAD Subaccount

To locate an account that you need to update, you search for the account by email address (or user ID if searching for an API account) or select the **View All Subaccounts** link to see a the **Authorized NLAD Subaccounts** table. In the **Authorized NLAD Subaccounts** table, click **Edit** next to the account you wish to change to be taken to the Update NLAD Subaccount page, where the selected subaccount can be deactivated, or a selected NAP subaccount can have its password reset.

16.1.2. Create New Subaccount

At the bottom of the page, click **New Subaccount** to be taken to the Create NLAD Subaccount page.

16.2. Manage NLAD Subaccount Page Screenshot

17. Update NLAD Subaccounts

> This article explains how an ETC Administrator can update, deactivate, or reset the password of any subaccount they create.
>
> Applies to: *ETC Administrator*.

17.1. Update NLAD Subaccount Page

From the Update NLAD Subaccount page, you can update, deactivate, or reset the password of the selected subaccount. In addition, you can alter the SPINs to which the subaccount has access.

You can only arrive at the Update NLAD Subaccount page through the [Manage NLAD Subaccount page](#).

17.1.1. Update
You can modify the first name, last name, and/or phone number of the account by making the appropriate changes to those fields and clicking **Update** to commit those changes.

17.1.2. Reset Password
You can reset the password of any NAP subaccount by clicking **Reset Password**.

A confirmation email will be sent to the user's email address with a temporary password.

You cannot reset the password of an API account. In order to reset an API account, you must deactivate it and recreate it.

17.1.3. Deactivate Subaccount
Click **Deactivate** to deactivate the subaccount. When you deactivate an API account, both the API ID and Key are deleted.

17.1.4. Change Subaccount Permissions
You can change the NAP subaccount's SPIN permissions from the SPIN table. Select or unselect SPINs, then select update to grant or remove access to those SPINs.

17.2. Update NLAD Subaccount Page Screenshot

USAC
Universal Service Administrative Company

LIFELINE   LOG OUT

USAC Home | Lifeline Program | NLAD | Update NLAD Subaccount

National Verifier (OFF)

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 NLAD Subaccounts
Create NLAD Subaccount
Create ETC API Account
Manage Email Recipients
Change Password

REPORTS AND TOOLS

UPDATE NLAD SUBACCOUNT

Instructions

Authorized NLAD User Information

Email Address   tania@testmail.com

First Name*   Last Name*

abc   WRIGHT

Phone Number*

9095558888

Subaccount Role

NLAD Role ETC Agent

Subaccount Permissions

	SPIN
☑	
☐	
☐	

[Update] [Reset Password] [Deactivate]

18. Manage Email Recipients

> This article explains how the ETC Administrator can use the Manage Email Recipients page to create and remove email notification recipients of batch uploads and benefit transfers.
>
> Applies to: *ETC Administrator.*

18.1. Manage Email Recipients Page

From the Manage Email Recipients page, you can view all the active email notification recipients, assign/create a recipient, and remove their accounts.

All SPINs associated with your ETC Administrator account are bestowed to any email notification recipients you create or assign from this page. The SPINs your ETC Administrator account has are listed in the section called "Recipient Permissions." If you do not see any SPINs, or you do not see the appropriate SPINs/number of SPINs, contact NLAD Support at NLADsupport@usac.org.

To navigate to the Manage Email Recipients page, click the **Manage Email Recipients** link from the **Account Management** section of the sidebar.

18.1.1. Assign/ Create Email Notification Recipient

Note: Required fields are denoted by a superscript red asterisk (*).

1. Enter user's email address into the **Email Address** field (**required**).

2. Click **Create.**

Your email notification recipient has now been created, and a confirmation email will be sent to the user's email address.

18.1.2. Email Address Confirmation

Recipients must confirm their email address to start receiving notifications. By clicking on the link embedded in the confirmation email, the recipient will officially opt in.

Confirmation emails will only be sent to recipients when they are assigned to receive notifications for the first time. If additional SPINs notifications are assigned, the email recipient account will be updated.

18.2. Manage Email Recipients Page Screenshot

18.3. Edit Email Recipient Page

From the Edit Email Recipient page, you can remove an email notification recipient.

18.3.1. Remove Email Notification Recipient

From the **Manage Email Recipients** page, click **Edit** next to the account you wish to discard to be taken to the **Edit Email Recipient** page.

To remove the selected recipient, click **Remove Email Recipient**. Removing a recipient will disable **ALL** SPINs notifications the user is assigned to.

18.4. Edit Email Recipient Page Screenshot

18.5. Opting out of Email Notifications

Recipients have the option to unsubscribe from email notifications they've been assigned to.

Each batch upload and benefit transfer email notifications will include an embedded link to "Unsubscribe" from future email notifications. A recipient that chooses to unsubscribe will disable **ALL** SPINs notifications the user is assigned to.

18.6. Email Notification Screenshot

The National Lifeline Accountability Database (NLAD) has completed processing the batch file named 3
you did not request this action be taken, please contact the NLAD Team at NLADsupport@usac.org.

Sincerely,
The NLAD Team
Universal Service Administrative Company

Click here to unsubscribe from all NLAD batch and transfer email notifications.

19. Reports

This article explains how to access the subscriber, duplicate subscriber, transaction, resolution status, subscriber snapshot, and recertification reports.

19.1. Reports Homepage

From the Reports homepage, you can select one of the available reports to view. There are a total of 10 reports in 6 categories.

1. Subscriber Reports - these reports contain all active NLAD subscribers.

2. Transaction Reports - these reports contain all subscribers' transactions performed within NLAD.

3. Resolution Status Reports - these reports contain the status of dispute resolution requests.

4. Duplicate Subscriber Reports - these reports contain identified duplicate records resolved during the duplicate resolution process.

5. Summary and Detail Subscriber Snapshot Report - this report will display a monthly snapshot (taken on 1st day of month at 6 am ET) of active NLAD subscribers.

6. Recertification Reports - this report contains subscribers information for the SACs that have elected USAC to perform the monthly recertification on their behalf. **NOTE**: Recertification reports are only available to ETCs that have elected USAC to perform their subscribers' recertification.

For each report category, with the exception of the Duplicate Subscriber report and Recertification report, you can generate a summary or detail report. Summary reports provide only counts of records that fall within the specified parameters. Detailed reports return the full records along with other relevant reporting fields.

Report data is limited to the SACs associated with your account.

To navigate to the Reports homepage, click on the **Reports** link in the Reports and Tools section of the sidebar.

19.1.1. Choose Report
Click on the desired report link from the available selection.

19.1.1.1. Reports Page Screenshot

19.2. Summary Subscriber Report

> This article explains how to generate a summary subscriber report that shows the total number of subscribers at the end of each day, within a specified range of dates for the selected SACs.

19.2.1. Summary Subscriber Report Page

From the Summary Subscriber Report page, you can create a report that shows the total number of subscribers at the end of each day, within a specified range of dates for the selected SACs.

Note: Summary reports are based on data that is updated at the end of each day.

To navigate to the Summary Subscriber Report page, click the **Reports** link from the Reports and Tools section of the sidebar, and then click **Summary Subscriber Report**.

Links to related reporting pages can be found at the bottom.

19.2.1.1. Generate Summary Subscriber Report

1. Select one or more SACs from the **Select SAC(s)** list. You can hold down the CTRL key when clicking on a SAC number to select multiple SACs. You can also select a range of SACs by clicking on the first SAC in the range, then hold down the SHIFT key and click on the last SAC in the range.

2. Enter the first date of the desired date range in the **Start Date** field. Do not use today's date. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

3. Enter the last date of the desired date range in the **End Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

4. Click **Submit**.

19.2.1.2. Interpret Summary Subscriber Report

The first column of the report is the Date column that lists all the dates in the specified range. Each subsequent column will represent each of the SACs you selected, and will include the total count of subscribers for that SAC on the corresponding date given in the Date column.

For example, if you select two SACs, **999999** and **999998**, and set the date range as **01/01/2014** to **01/02/2014**, you would get a report that looked like this:

Date	999999	999998
01/01/2014	55	122
01/02/2014	59	103

19.2.2. Summary Subscriber Report Page Screenshot

19.3. Detail Active Subscriber Report

This article explains how to generate a detail active subscriber report that shows the subscriber records for the currently-active subscribers of a particular SAC.

19.3.1. Detail Active Subscriber Report Page

From the Detail Active Subscriber Report page, you can create a report that shows all of the currently-active subscriber records for a specified SAC.

To navigate to the Detail Active Subscriber Report page, click the **Reports** link from the Reports and Tools section of the sidebar, then click **Detail Active Subscriber Report**.

Links to related reporting pages can be found at the bottom.

19.3.1.1. Generate Detail Active Subscriber Report

1. Select one or more SAC(s) from the **Select SAC(s)** filter. The "Select All" option will select all SAC(s) assigned to your user account; the "Un-Select All" option will clear your current SAC(s) selection.

NOTE: The Select SAC(s) filter text box will show up to 16 SACs selected. If more than 16 SACs are selected, the total number of SACs will be displayed in the filter text box.

2. Select the Anniversary Month from the **Anniversary Month** drop-down menu. **(Optional)**
    NOTE: If an "Anniversary Month" is selected, the Detail Active Subscriber Report will display only the records that are due for recertification for the selected month.

3. Choose the report format from the **Select Report Format** section. The option to "Display on web page" will display the results in your browser (limited to 500 records). The "CSV file" option will initiate a file download of a CSV format file containing all the records.

4. Click **Submit**.

19.3.1.2. Interpret Detail Active Subscriber Report

Your results will include all current subscribers at the time the report was run.

Note: This data may not match the *summary* data from a **Summary Subscriber Report**, as summary data is only current as of midnight of the previous day.

Both the CSV download, and the in-browser display, will include the subscriber records for all currently-active subscribers under the selected SAC. In the browser, you can click on any heading to sort the data by that column.

In addition to the subscriber-record columns that contain the subscriber information, these columns are included:

1. **NLAD Transaction Date** - the date the subscriber was enrolled in NLAD, not to be confused with service initiation date, which is the date their service effectively started.

2. **Enrollment Code** - represents how the subscriber was enrolled with the current ETC. There are four possible values:

    a. BAU - subscriber was enrolled during normal production.

    b. INIT - subscriber was enrolled during initialization.

    c. INIT_DRC - subscriber was allocated to the current ETC during migration as a part of duplicate resolution.

    d. TRANSFER- subscriber was transferred to the current ETC from another during a benefits transfer transaction.

    e. OVERRIDE_BAU - subscriber was enrolled by support services.

    f. OVERRIDE_UPDATE - subscriber was updated by support services.

    g. OVERRIDE_TRANSFER - subscriber was transferred by support services.

3. **Last Transaction Type** - the type of the most-recent transaction that was performed on the subscriber record.

4. **Last Transaction Effective Date** - the date the most-recent transaction was performed on the subscriber record.

19.3.2. Detail Active Subscriber Report Page Screenshot

19.4. Summary Transaction Report

This article explains how to generate a summary transaction report that shows the total number of transactions by type at the end of each day, within a specified range of dates for the selected SACs.

19.4.1. Summary Transaction Report Page

From the Summary Transaction Report page, you can create a report that shows the total number of transactions by type at the end of each day, within a specified range of dates for the selected SACs.

Note: Summary reports are based on data that is updated at the end of each day.

To navigate to the Summary Transaction Report page, click the **Reports** link from the Reports and Tools section of the sidebar, and then click **Summary Transaction Report**.

Links to related reporting pages can be found at the bottom.

19.4.1.1. Generate Summary Transaction Report

1. Select one or more SACs from the **Select SAC(s)** list. You can hold down the CTRL key when clicking on a SAC number to select multiple SACs. You can also select a range of SACs by clicking on the first SAC in the range, then hold down the SHIFT key and click on the last SAC in the range.

2. Enter the first date of the desired date range in the **Start Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

3. Enter the last date of the desired date range in the **End Date** field. Do not use today's date. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

4. Select one or more transaction types from the **Type** option list.

5. Click **Submit**.

19.4.1.2. Interpret Summary Transaction Report

The first column of the report is the Date column that lists all the dates in the specified range. The next column is the SAC column, which lists the SACs with applicable data for that date. Each subsequent column will represent the transactions you selected, and will include the total count of that transaction type for the corresponding SAC on the corresponding date given in the Date column.

For example, if you select two SACs, **999999** and **999998**, set the date range as **01/01/2014** to **01/02/2014**, and select **Enroll** and **Update**, you would get a report that looked like this:

Date	SAC	Enroll	Update
01/01/2014	999999	22	4
01/01/2014	999998	79	18
01/02/2014	999999	16	1
01/02/2014	999998	55	7

19.4.2. Summary Transaction Report Page Screenshot

19.5. Detail Transaction Report

This article explains how to generate a detail transaction report that shows all transactions of a selected type for a particular SAC.

19.5.1. Detail Transaction Report Page

From the Detail Transaction Report page, you can create a report that shows all transactions of a selected type, for a particular SAC, in the specified date range. The available transaction types for this report are: Enroll, De-Enroll, Update, and Benefit Transfer.

To navigate to the Detail Transaction Report page, click the **Reports** link from the Reports and Tools section of the sidebar, then click **Detail Transaction Report**.

Links to related reporting pages can be found at the bottom.

19.5.1.1. Generate Detail Transaction Report
1.   Select a SAC from the **Select SAC** drop-down menu.

2. Enter the first date of the desired date range in the **Start Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

3. Enter the last date of the desired date range in the **End Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

4. Select a transaction type from the **Type** option list.

5. Choose the report format from the **Select Report Format** section. The option to "Display on web page" will display the results in your browser (limited to 500 records). The "CSV file" option will initiate a file download of a CSV format file containing all the records.

6. Click **Submit**.

19.5.1.2. Interpret Detail Transaction Report

Your results will include all transactions created on the specified start date through to, and including, requests created on the end date.

Note: This data may not match the *summary* data from a **Summary Transaction Report**, as summary data is only current as of midnight of the previous day.

Both the CSV download, and the in-browser display, will include the transaction records for all transactions of the chosen type under the selected SAC for each date in the range of dates.

In addition to the original transaction details, the following columns are included:

1. **NLAD Transaction Date** - the date the subscriber was enrolled in NLAD, not to be confused with service initiation date, which is the date their service effectively started.

2. **Enrollment Code** - represents how the subscriber was enrolled with the current ETC. There are four possible values:

    a. BAU - subscriber was enrolled during normal production.

    b. INIT - subscriber was enrolled during initialization.

    c. INIT_DRC - subscriber was allocated to the current ETC during migration as a part of duplicate resolution.

    d. TRANSFER- subscriber was transferred to the current ETC from another during a benefits transfer transaction.

    e. OVERRIDE_BAU - subscriber was enrolled by support services.

    f. OVERRIDE_UPDATE - subscriber was updated by support services.

    g. OVERRIDE_TRANSFER - subscriber was transferred by support services.

19.5.2. Detail Transaction Report Page Screenshot

19.6. Summary Resolution Status Report

This article explains how to generate a summary resolution status report that shows the total number of resolution requests by status at the end of each day within a specified range of dates for the selected SACs.

19.6.1. Summary Resolution Status Report Page

From the Summary Resolution Status Report page, you can create a report that shows the total number of resolution requests by status at the end of each day within a specified range of dates for the selected SACs.

Note: Summary reports are based on data that is updated at the end of each day.

The available statuses are:

- **Open** - the request has been submitted to the NCS, but has not been processed.

- **In Progress** - an agent has begun processing the request.

- **Closed** - the request has been processed. This counts both CLOSED_ACCEPTED and CLOSED_REJECTED statuses.

To navigate to the Summary Resolution Status Report page, click the **Reports** link from the Reports and Tools section of the sidebar, and then click **Summary Resolution Status Report**.

Links to related reporting pages can be found at the bottom.

19.6.1.1. Generate Summary Resolution Status Report

1. Select one or more SACs from the **Select SAC(s)** list. You can hold down the CTRL key when clicking on a SAC number to select multiple SACs. You can also select a range of SACs by clicking on the first SAC in the range, then hold down the SHIFT key and click on the last SAC in the range.

2. Enter the first date of the desired date range in the **Start Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

3. Enter the last date of the desired date range in the **End Date** field. Do not use today's date. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

4. Select one or more of the resolution statuses (Open Requests, In Progress Requests, Closed Requests).

5. Click **Submit**.

19.6.1.2. Interpret Summary Resolution Status Report

The first column of the report is the Date column that lists all the dates in the specified range. The next column is the SAC column, which lists the SACs with applicable data for that date. Each subsequent column will represent the resolution status you selected, and will include the total count of resolution requests in that status for the corresponding SAC on the corresponding date given in the Date column.

For example, if you select two SACs, **999999** and **999998**, set the date range as **01/01/2014** to **01/02/2014**, and select **Open** and **In Progress**, you would get a report that looked like this:

Date	SAC	Open	In Progress
01/01/2014	999999	4	1
01/01/2014	999998	9	3
01/02/2014	999999	3	2
01/02/2014	999998	5	2

19.6.2. Summary Resolution Status Report Page Screenshot

19.7. Detail Resolution Status Report

> This article explains how to generate a detail resolution status report that shows all resolution requests of the selected type for the selected SAC.

19.7.1. Detail Resolution Status Report Page

From the Detail Resolution Status Report page, you can create a report that shows all resolution requests of the selected status, for the selected SAC, in the specified date range. The available statuses are:

- **Open** - the request has been submitted to the NCS, but has not been processed.

- **In Progress** - an agent has begun processing the request.

- **Closed** - the request has been processed. This displays both CLOSED_ACCEPTED and CLOSED_REJECTED statuses.

To navigate to the Detail Resolution Status Report page, click the **Reports** link from the Reports and Tools section of the sidebar, then click **Detail Resolution Status Report**.

Links to related reporting pages can be found at the bottom.

19.7.1.1. Generate Detail Resolution Status Report

1. Select a SAC from the **Select SAC** drop-down menu.

2. Enter the first date of the desired date range in the **Start Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

3. Enter the last date of the desired date range in the **End Date** field. Date must be formatted MM/DD/YYYY. You may optionally select the date with the calendar widget that appears when you click on the field.

4. Select one of the resolution statuses (Open Requests, In Progress Requests, Closed Requests).

5. Choose the report format from the **Select Report Format** section. The option to "Display on web page" will display the results in your browser (limited to 500 records). The "CSV file" option will initiate a file download of a CSV format file containing all the records.

6. Click **Submit**.

19.7.1.2. Interpret Detail Resolution Status Report

Your results will include all resolution requests created on the specified start date through to, and including, requests created on the end date. The resolution status reflects its status in NLAD at the time the report was run.

Note: This data may not match the *summary* data from a **Summary Resolution Status Report**, as summary data is only current as of midnight of the previous day.

Both the CSV download, and the in-browser display, include the resolution request records for all resolution requests of the chosen status under the selected SAC for each date in the range of dates. These columns are included:

1. **Creation Date** - the date the resolution request was written to the resolution request table.

2. **Resolution ID** - the resolution request ID.

3. **Resolution Request Status** - the current status of the request.

4. **Reason for Rejection** - if the status is CLOSED_REJECTED, then a rejection reason will display here. The possible rejection reasons are:

   a. Insufficient Proof - for cases where the submitting ETC has not provided the necessary proof to override the rejection.

   b. Duplicate Request or Already Resolved - for cases where the submitting ETC has created more than one request for the same rejection, or for when the submitting ETC has resubmitted a request on an already-resolved case.

   c. Other - for all other cases not covered by the above options.

5. **Failure Message Code** - the error message code related to the transaction rejection reason.

19.7.2. Detail Resolution Status Report Page Screenshot

19.8. Duplicate Subscriber Report

This article explains how to generate a duplicate subscriber report that shows the subscriber records for duplicate subscribers of a particular SAC.

19.8.1. Duplicate Subscriber Report Page

From the Duplicate Subscriber Report page, you can create a report that shows all of the duplicate subscribers.

To navigate to the Duplicate Subscriber Report page, click the **Reports** link from the Reports and Tools section of the sidebar, then click **Duplicate Subscriber Report**.

Links to related reporting pages can be found at the bottom.

19.8.1.1. Generate Duplicate Subscriber Report

1.   Select a SAC from the **Select SAC** drop-down menu.

2. Choose the report format from the **Select Report Format** section. The option to "Display on web page" will display the results in your browser (limited to 500 records). The "CSV file" option will initiate a file download of a CSV format file containing all the records.

3. Click **Submit**.

19.8.1.2. Interpret Duplicate Subscriber Report

Your results will include all duplicate subscribers for the SAC selected, at the time the report was run.

Both the CSV download, and the in-browser display, will include all duplicate subscribers under the selected SAC. In the browser, you can click on any heading to sort the data by that column.

In addition to the subscriber-record columns that contain the subscriber information, these columns are included:

1. **Enrollment Date** - the service initiation date provided

2. **Duplicate Type** - represents how the subscriber was identified as a duplicate. There are nine possible values:

    a. Duplicate Subscriber - subscriber was identified as receiving multiple lifeline benefits.

    b. Duplicate Address - subscriber's address was identified as being duplicate.

    c. Duplicate Subscriber & Duplicate Address - subscriber was identified as receiving multiple lifeline benefits and also has a duplicate address.

    d. Migration - Duplicate Subscriber - subscriber was identified as a duplicate during the migration process or identified during the interstate duplicate resolution processing.

    e. Migration - Duplicate Subscriber - Active - active subscriber was identified as a duplicate during the interstate duplicate resolution processing.

    f. Migration - Duplicate Phone Number - subscriber's phone number was identified as a duplicate during the migration process or identified during the interstate duplicate resolution processing.

    g. Migration - Duplicate Address - subscriber's address was identified as a duplicate during the migration process or identified during the interstate duplicate resolution processing.

    h. Migration - Dup Sub & Number - subscriber and his or her number was identified as a duplicate during the migration process or identified during the interstate duplicate resolution processing.

    i. Production - Duplicate Subscriber - subscriber was identified as a duplicate during BAU duplicate resolution processing and/or by separate review process.

3. **Last Transaction Effective Date** - the enrollment transaction date provided

Duplicate Subscriber Report Page Screenshot

19.9. Duplicate Resolution De-Enroll Report

This article explains how to generate a duplicate resolution de-enroll report that shows the duplicate records of a particular SAC that are to be de-enrolled as an outcome of the Duplicate Resolution Process.

19.9.1. Duplicate Resolution De-Enroll Report Page

From the Duplicate Resolution De-Enroll Report page, you can create a report that shows all of the duplicate subscribers to be de-enrolled as an outcome of the Duplicate Resolution Process for the SAC selected.

To navigate to the Duplicate Resolution De-Enroll Report page, click the **Reports** link from the Reports and Tools section of the sidebar, then click **Duplicate Resolution De-Enroll Report**.

Links to related reporting pages can be found at the bottom.

19.9.1.1. Generate Duplicate Resolution De-Enroll Report

1. Select a SAC from the **Select SAC** drop-down menu.

2. Choose the De-Enroll report type from the **Type** section.

3. Choose the report format from the **Select Report Format** section. The option to "Display on web page" will display the results in your browser (limited to 500 records). The "CSV file" option will initiate a file download of a CSV format file containing all the records.

4. Click **Submit**.

19.9.1.2. Interpret Duplicate Resolution De-Enroll Report

Your results will include all duplicate subscribers by type to be De-Enrolled for the SAC selected, at the time the report was run.

Both the CSV download, and the in-browser display, will include all duplicate subscribers by type to be De-Enrolled by the selected SAC. In the browser, you can click on any heading to sort the data by that column.

In addition to the subscriber-record columns that contain the subscriber information, these columns are included:

1. **Enrollment Date** - the service initialization date provided

2. **Last Transaction Effective Date** - the enrollment transaction effective date

19.10. Duplicate Resolution De-Enroll Report Screenshot

19.11. Summary and Detail Subscriber Snapshot Report

This article explains how to generate a Summary and Detail Subscriber Snapshot Report that shows the total count of active subscribers per SAC for a selected data month.

19.11.1. Summary and Detail Subscriber Snapshot Report Page

From the Summary and Detail Subscriber Snapshot Report page, you can create a report that shows the total count of active subscribers per SAC for a selected data month.

Note: The snapshot is taken at 6 am ET on the 1st day of the month, and will be available to download after 7 am ET on the same day. Subscriber Snapshot Reports for prior data months will be accessible in NLAD for a period up to 24 months.

To navigate to the Summary and Detail Subscriber Snapshot Report page, click the **Reports** link from the Reports and Tools section of the sidebar, and then click **Summary and Detail Subscriber Snapshot Report**.

19.11.1.1. Generate Summary and Detail Subscriber Snapshot Report

1. Select one or more SAC(s) from the **Select SAC(s)** filter. The "Select All" option will select all SAC(s) assigned to your user account; the "Un-Select All" option will clear your current SAC(s) selection.

   NOTE: The Select SAC(s) filter text box will show up to 16 SACs selected. If more than 16 SACs are selected, the total number of SACs will be displayed in the filter text box.

2. Next, select the data month/ year from the **Select FCC Form 497 Data Month/Year** drop-down filter; field is limited to one data month per Subscriber Snapshot Report.

3. Click **Submit**.

19.11.2. Summary and Detail Subscriber Snapshot Report Page Screenshot

19.11.2.1. Interpret Summary and Detail Subscriber Snapshot Report

On the 1st day of each month at 6 am ET, the NLAD system will take a Snapshot of carriers' prior month's active subscribers' data. Transactions performed in NLAD after the 6 am ET cutoff time will be accounted for in the following month's Subscribers Snapshot Report.

The monthly Subscriber Snapshot Report can be viewed at the summary and detail level:

1. **Summary Subscriber Snapshot Report:** Total count of Tribal and Non-Tribal subscribers per SAC for a selected Data Month

2. **Detail Subscriber Snapshot Report:** Listing of all active subscribers' records per SAC for a selected Data Month

Note: Within The Subscriber Snapshot Report, carriers can download CSV files for both the **Summary Subscriber Snapshot Report** and the **Detail Subscriber Snapshot Report**.

Additionally, carriers can also download a **Consolidated Detail Report (CSV file)** to pull a listing of all current active Subscribers for the selected SAC(s).

19.12. ETC Recertification Snapshot Report

This article explains how to generate an ETC Recertification Snapshot Report that shows all records that will be undergoing the rolling recertification process for a selected data month.

Applies to: ETC Administrator

19.12.1. ETC Recertification Snapshot Report Page

NOTE: The ETC Recertification Snapshot Report is only available to ETCs that have elected USAC to perform their subscribers' rolling recertification.

From the ETC Recertification Snapshot Report page, you can create a report that shows all subscribers per SAC that will be undergoing the rolling recertification process for a selected data month; a subscriber's rolling recertification due date is based on the "Anniversary date".

The ETC Recertification Snapshot Report will be available to download online 1 month prior to the start of the recertification process for any given month.

To navigate to the ETC Recertification Snapshot Report page, click the **Reports** link from the Reports and Tools section of the sidebar, and then click **ETC Recertification Snapshot Report**.

19.12.1.1. Generate ETC Recertification Snapshot Report

1. Select the data month/ year from the **Select Recertification Month/Year** drop-down filter; field is limited to 1 data month per ETC Recertification Snapshot Report.

2. Click **Submit**.

19.12.2. ETC Recertification Snapshot Report Page Screenshot

20. Glossary

Term	Definition
Anniversary Date	System-generated due date for rolling recertification, occurs every 12 months from the customer's service initiation date, or the date when their eligibility was last verified.
API Account	An account used solely for machine-to-machine transactions through the NLAD application programming interface API. An API account cannot be used to login to the NLAD application portal.
NAP Account	An NLAD application portal (NAP) account is used to login to the NLAD website through a web browser. This account cannot be used for transactions with the NLAD API.
497 Officer	For the purposes of filing and certifying FCC Form 497, the definition of an officer is a person who occupies a position specified in the corporate by-laws (or partnership agreement), and would typically be the president, vice president for operations, vice president for finance, comptroller, treasurer, or comparable position. If the filer is a sole proprietorship, the owner must sign the certification.
Batch Batch File	Transactions can be processed in batches by including multiple NLAD transactions within a batch file and submitting it. The batch file format is CSV, where each row of the file is an individual transaction. Batch transactions are processed in the order they appear in the batch file from top to bottom.
Benefit Qualifying Person (BQP)	The person who provides eligibility for Lifeline benefits to a Lifeline subscriber when the subscriber does not qualify. Typically, this person qualifies for Lifeline benefits, but cannot subscribe to a carrier on their own, and is a dependent of the subscriber.
Transfer Lifeline Benefits	The process by which the Lifeline benefits for a subscriber are transferred from one carrier to another.
IEH Certification	Independent Economic Household certification, whereby an ETC can certify that a subscriber is sharing an address with another eligible subscriber. See Independent Economic Household.
De-Enroll	A transaction type with which an ETC may remove a subscriber from NLAD. Used when the subscriber leaves, or is removed from the ETC, or when the subscriber ceases to be eligible for, or declines Lifeline benefits.
De-Enroll Deceased	A de-enrollment code used to de-enroll a Lifeline subscriber who has deceased.
De-Enroll Failed Recertification	A de-enrollment code used to de-enroll a Lifeline subscriber who has not filed their annual Lifeline recertification.

Term	Definition
De-Enroll Leaving	A de-enrollment code used to de-enroll a Lifeline subscriber who is opting out of the Lifeline program, or is no longer eligible for benefits.
De-Enroll Non-Usage	A de-enrollment code used to de-enroll a Lifeline subscriber who has not used their benefits for 60 days.
De-Enrollment Codes	Refers to one of the various de-enrollment types listed above. The appropriate de-enrollment code must be selected when de-enrolling a subscriber.
Duplicate	A duplicate subscriber, or a subscriber with a duplicate phone number, is not permitted to enroll in NLAD.
Duplicate Resolution (DRC)	The process by which duplicate subscriber conflicts are resolved.
Eligibility Code	The program code under which the subscriber is eligible for Lifeline benefits. More information about program codes can be found here: Updated-Enrollment-Eligibility-Codes
Eligible Telecommunications Carrier (ETC)	Any telephone company deemed eligible by the FCC to provide Lifeline service and receive Lifeline funding.
Enroll	A transaction type with which an ETC may enroll a subscriber into NLAD.
Flag	A term referring to any of the binary fields used to indicate a particular status for a subscriber transaction. A "flag" field can only have a value of "1" or "0".
Independent Economic Household (IEH)	IEH is a status a subscriber may have that makes them eligible for Lifeline benefits while sharing an address with another Lifeline benefits recipient. When processing a subscriber, the IEH flag can be used to indicate that the subscriber is an independent economic entity sharing an address with another Lifeline subscriber. ETCs must collect and retain the IEH worksheet from the subscriber.
Initialization	The period during which ETCs have their current dataset loaded into NLAD. This is a one-time event that occurs before NLAD moves into full production.
Lifeline Tribal Benefit	This refers to the Tribal Lands Lifeline program, which provides additional funds to Lifeline subscribers living on Tribal lands.
Link Up Service	Link Up Service provides a one-time subsidy towards an initial installation for telephone service in Tribal lands.
Production	The post-initialization period in which NLAD is live and available to states and ETCs that have gone through initialization.
Resolution ID	

Term	Definition
Resolution Request	When certain types of transactions fail, they will produce a Resolution ID. This unique identifier can be used for support and issue resolution with NLAD Customer Service.
Rural Address	Refers to any address within a rural area that is not registered with the United States Postal Service (USPS) Address Matching Service (AMS), nor able to receive postal delivery.
Service Initiation Date	Date that the service provider determined that the subscriber was eligible for Lifeline program-supported service.
Service Type	Service that meets the Lifeline Program minimum service standards.
Study Area Code (SAC)	This is the 6-digit number associated with the ETC providing the Lifeline benefit to the subscriber.
Subscriber ID	NLAD system-generated unique identifier (9 Characters/ Alphanumeric); Only provided on successful transactions.
Effective Date	The date the transaction actually took place, which may differ from the date the transaction was submitted to NLAD. For example, if you de-enroll a subscriber on 12/10/2013, but submit the de-enroll transaction for that subscriber on 12/11/2013, the effective date is 12/10/2013, which is what should be entered in this field.
Transaction Type	Refers to a finite list of possible NLAD transactions. The transactionType field is used in API and batch submissions to define the type of each transaction.
Tribal Enrollment Number	See Tribal Identification.
Tribal Identification	A unique multi-digit identifier found on Tribal ID cards. Sometimes referred to as Tribal Enrollment Number.
Validations (File/Row)	Validations refer to the various rule checks that are performed on transactions. Failing a validation typically results in a rejection of that transaction.
Verify	A transaction type that allows an ETC to pre-validate a subscriber information before enrollment into NLAD.