Housekeeping

- Audio is available through your computer’s speakers
- The audience will remain on mute
- **Enter questions at any time using the “Questions” box**
  - There is a large audience signed in today. We will accept as many questions as possible!
- If your audio or slides freeze, restart the webinar
- A copy of the slide deck is in the “Handouts” section of webinar panel
Introduction
Overview

• Welcome to the National Verifier!

• If you do business in Indiana, Kentucky or Michigan and are familiar with the National Verifier service provider portal and paper process, you can start using them now.
  • USAC will refer to this group of states & territories as the March 2019 launch group
About the National Verifier

• The National Verifier will determine consumer’s Lifeline eligibility

• Service providers will no longer determine consumers are eligible for Lifeline

• The National Verifier will make eligibility determinations, service providers must enter a consumer into NLAD to enroll in Lifeline

• The National Verifier will handle the annual recertification process
Overview

• When the National Verifier launches in a state there is an optional soft launch period followed by a mandatory hard launch

• At the hard launch, consumers in a state can apply directly through the National Verifier

• When a state enters the National Verifier, all current Lifeline consumers go through a one-time reverification process that ensures they meet all Lifeline requirements
Getting Started
<table>
<thead>
<tr>
<th>State</th>
<th>Qualifying Programs with Automated Data Sources</th>
<th>Manual Verifications (Uploaded or Mailed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indiana</td>
<td>FPHA, SNAP, Medicaid</td>
<td>SSI, Veterans Pension, Tribal programs, income</td>
</tr>
<tr>
<td>Kentucky</td>
<td>FPHA, SNAP, Medicaid</td>
<td>SSI, Veterans Pension, Tribal programs, income</td>
</tr>
<tr>
<td>Michigan</td>
<td>FPHA, SNAP, Medicaid, SSI</td>
<td>Veterans Pension, Tribal programs, income</td>
</tr>
</tbody>
</table>
Getting Started
Creating User Accounts and Credentials
Service provider administrators can grant NV Web Portal access to their employees using the NLAD system. The following guidance applies to all service providers:

- Each National Verifier user must have unique login credentials. **Users are not permitted to share accounts.**
- **Service providers with NLAD credentials can use the same credentials** to access and use the National Verifier Service Provider Web Portal.
  - NLAD's existing user permissions are not changing.
  - Anyone with NLAD access will have National Verifier access.
- **A new account category has been created (SP Agent) for sales associates who will access the NV Web Portal but do not need NLAD access.**
- **USAC has removed the limit on how many NLAD sub-accounts a service provider can create.** USAC will also track activity for these accounts in the NV Web Portal.
Service Provider NV Web Portal Experience
User Accounts and Credentials

There are **four different types of service provider user accounts** within NLAD that map to **two NV Web Portal account types**. SP users must each have their own account/credentials; those who already have NLAD accounts can use these credentials to log into the Portal.

If a service provider representative **does not have** an existing NLAD account, they **must have their Admin grant them the appropriate access level**.

<table>
<thead>
<tr>
<th>NLAD Account Types</th>
<th>NV Web Portal Account Types</th>
<th>Check Eligibility</th>
<th>Upload Supporting Documents</th>
<th>View Dashboard of Applications Submitted for Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>SP Admin</td>
<td>SP Admin</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>SP Analyst</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SP Ops</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SP Agent</td>
<td>SP Agent</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

SP Agent credentials do not have permission to access NLAD.
Service Provider NV Web Portal Experience
Creating National Verifier Credentials

Service providers can create company associate credentials for the NV Web Portal in NLAD, using the same process that they use to create NLAD sub-accounts.

Service providers who already have NLAD credentials do not need to do anything— their existing credentials will allow access to the NV Web Portal. **The process for creating NV credentials is:**

1. **In NLAD, select the "Create NLAD Subaccount" link in the "Account Management" menu on the left.**

2. **Enter the user's email address (required).**

3. **Click “Search” to locate the user information. If an account is found matching that email address, skip to step 5.**

4. **Select the desired role for the account from the "NLAD Role" drop-down menu (i.e. ETC Agent) and click "Submit".**

5. **If no matching account was found, enter the new user's information.**

Full video demonstrations available here:
Service Provider NV Web Portal Experience

Step 1: Create NLAD Sub-account

In NLAD, the SP Admin user will navigate to the “Account Management” tab, and click “Create NLAD Subaccount”.

Service Provider NV Web Portal Experience
Step 2: Enter E-mail Address

The SP Admin user will enter the desired user’s email address.
Service Provider NV Web Portal Experience
Step 3: Search for User Information

After entering the desired user’s email address, the SP Admin will click “Search” to locate the user’s information. If their information is found, skip to Step 5.
Service Provider NV Web Portal Experience

Step 4: Enter New User Information

If the user’s information is not found then the SP Admin will enter the user’s information. The user’s first name, last name, and phone number are required fields.

First name, last name, and phone number are required. Phone numbers must be exactly 10 characters long.
Select the desired role for the account from the “NLAD Role” drop-down menu (i.e. ETC Agent) and click "Submit".

See a full video demonstrations:
Once a Service Provider has created NV credentials in NLAD, they may start assisting consumers apply for Lifeline on the NV Web Portal. **The process for creating applications on the NV Web Portal is:**

1. Sign into your Service Provider account on the National Verifier homepage.
2. Start a new application on the Service Provider portal.
3. Enter the Subscriber’s Information (name, date of birth, SSN4, and address).
4. Select the Subscriber’s qualifying program(s).
5. Review the Subscriber’s information.
6. Ask the Subscriber to initial and e-sign the Subscriber’s Agreement.
Qualify for Lifeline!

Lifeline is a federal benefit that lowers the monthly cost of phone or internet service. Qualifying is the first step to getting your Lifeline Benefit.

What is your state or territory?

Choose

Get Started If you do not want to qualify online, you can use a paper form.

Do you need to recertify?
If you already get Lifeline and received a notice that said you need to recertify, use the recertify button.

Recertify to keep Lifeline

Are you a service provider?
If you are a service provider and need to qualify your customer for Lifeline, use the service provider portal.

Sign in as a Service Provider >
Service Provider NV Web Portal Experience
Navigating the Home Page View

Once a SP Admin grants a SP user access, they will be able to go to the NV Web Portal by navigating to checklifeline.org. They must log in below.

Sign In To Your Account

![Sign In Form]

Need Help Accessing Your Existing Account?

Contact your company administrator.

Don't Have an Account?

If you have an account in the National Lifeline Accountability Database (NLAD), sign in using those credentials. Otherwise, contact your company administrator.

Print an application to mail in?

If you want to fill out a form on paper, you can print a paper form to mail in.

SP representatives should not allow their browsers to store their NV Web Portal username and password. They must enter their username and password each time they log in.
Service Provider NV Web Portal Experience
Navigating the Home Page View – Apply

Once logged in, they will see their home page. The service provider can assist a consumer in starting a new application by clicking the “Start New Application” button on their home page.

The user interface of an application is similar to the view experienced by consumers.

Welcome Service Provider Agent

Pending Applications
Displaying 23 of 642 records

<table>
<thead>
<tr>
<th>Subscriber Name</th>
<th>Application ID</th>
<th>Application Created</th>
<th>Status</th>
<th>Failure Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrew Donald</td>
<td>Q97434-19793</td>
<td>08/29/2018 08:06:28</td>
<td>Pending Review</td>
<td>tpividentiy, Eligibility, InvalidAddress</td>
</tr>
<tr>
<td>Henry Jackson</td>
<td>Q16232-36056</td>
<td>08/29/2018 08:05:15</td>
<td>More Documentation Needed</td>
<td>tpividentiy, Eligibility, InvalidAddress</td>
</tr>
<tr>
<td>Glass Blue</td>
<td>Q68468-36835</td>
<td>08/29/2018 07:59:56</td>
<td>More Documentation Needed</td>
<td>tpividentiy, Eligibility, InvalidAddress</td>
</tr>
<tr>
<td>Hawaii Guy</td>
<td>Q61617-19693</td>
<td>08/28/2018 21:36:21</td>
<td>Pending Review</td>
<td>tpividentiy, Eligibility, InvalidAddress</td>
</tr>
</tbody>
</table>

Note: Service provider representatives can access the dropdown from “Your Account” at any point while logged into their NV Web Portal account to view these dropdown options.
Service Provider NV Web Portal Experience
Navigating the Home Page View – Apply

1

Subscriber’s Information
We will use this information to find out if the subscriber qualifies for the Lifeline Program.

What is their full legal name?
The name they use on official documents, like their Social Security Card or State ID. Not a nickname.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Name (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Suffix (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What is their date of birth?

<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM</td>
<td>DD</td>
<td>YYYY</td>
</tr>
</tbody>
</table>

What are the last 4 numbers of their Social Security Number (SSN)?

Give their Social Security Number instead.

What is their home address?
The address where they will get service. Do not use a P.O. Box.

<table>
<thead>
<tr>
<th>Street Number and Name</th>
<th>Apt, Unit, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Clear All

Note: A consumer can find the last four numbers of their social security number on their social security card, tax returns, W-2, and bank statements. A consumer can find their Tribal ID number on their Tribal ID card or relevant documentation.
Tell Us Which Program They Are In

To qualify for Lifeline, we need to know which government assistance program the subscriber is in.

Are they in any of these?

Check all that apply.

- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program
- They don’t participate in one of these programs, and want to qualify through income
- They are not in any of these programs, but their child or dependent is

Review the Subscriber’s Information

Before we check if they qualify for Lifeline, make sure they check and see that their information is right.

Double check the information below.

- Full Legal Name: Jane Mary Smith
- Date of Birth: March 10, 1959
- Last 4 Numbers of SSN: 1234
- Address: 123 Main Street, Apt 206
- City: Chicago
- State: IL
- Zip Code: 60789

Ask the subscriber to confirm that it is okay for us to use their information to check if they qualify for Lifeline.

- By checking this box you are consenting that all of the information you are providing may be collected, used, shared, and retained for the purposes of applying for and/or receiving the Lifeline program benefit.
If there is an error with the system connections to databases, the service provider will see an error indicating so.

Review the Subscriber’s Information

Before we check if they qualify for Lifeline, make sure they check and see that their information is right.

There Was a Problem

Come back later and try again. This is not a problem with your computer or Internet connection. We are working to fix it as fast as possible.

If you need help right now, you can call Lifeline Customer Service at 1-800-000-0000.

Double check the information below.

Full Legal Name: Jane Mary Smith
Date of Birth: March 10, 1959
Last 4 Numbers of SSN: 1234
Address: 123 Main Street, Apt 206
Chicago, IL 60789

Ask the subscriber to confirm that it is okay for us to use their information to check if they qualify for Lifeline.

By checking this box you are consenting that all of the information you are providing may be collected, used, shared, and retained for the purposes of applying for and/or receiving the Lifeline program benefit.
Service Provider NV Web Portal Experience
Navigating the Home Page View – Apply

4 Subscriber’s Agreement

Please have the subscriber initial next to each statement and sign this form to finish the process.

I understand that it is against the law to lie on this form and agree, under penalty of perjury, to the following statements:

Initial

- I (or my dependent or other person in my household) currently get benefits from the government program(s) listed on this form or my annual household income is 135% or less than the Federal Poverty Guidelines (the amount listed in the Federal Poverty Guidelines table on this form).

...There are 9 total statements to initial.

Subscriber’s Signature

Type your full legal name (the same as you gave us before) below.

Jane Mary Smith

I understand this is a digital signature, and is the same as if I signed my name with a pen.

It is critical that the consumer understands and consents to the information in each statement.

The representative cannot initial the boxes on the form or enter the e-signature for the consumer. The benefit recipient must be the one to initial, even when applying with a BQP.

After submission is complete, user will be redirected to the page corresponding to eligibility application status (i.e. Qualified, Already Enrolled in Lifeline, Pending Review).
Checking Application Status
Once a service provider has assisted a consumer in submitting an application, they will be able to see all pending applications they have submitted.

Note: If an application is in “More Documentation Needed” status, Service Provider Representatives must select “Start New Application” and re-enter the consumer’s PII to retrieve the current application.
Submitting Documentation
If a consumer requests assistance from a service provider representative in uploading documentation, they can help via their NV Web Portal SP account.

The representative will need to click “Start New Application” and follow the same steps as when creating a new application* to then enter the consumer’s PII and retrieve the consumer’s application errors.

* Please reference slides 22-24 of this presentation for screenshots and guidance on creating new applications.
We Didn't Recognize Their Information

We couldn't match the subscriber in our records.

Show that they are this person.

This is the information you gave us.

Full Legal Name: Pending Again
Date of Birth: October 13, 1987
Last 4 SSN: 3312

If you see a typo in their information, fix it here.

Show us that this information is right.

We couldn't confirm the subscriber’s identity. We need to see an official document that has their first name, last name, date of birth, and Social Security Number (SSN) on it. Please show us something from one of the following lists.

Show us 1 item:
To be accepted, the copy must have their first name, last name, date of birth, and SSN on it.
• U.S. government, military, state, or Tribal issued ID (unexpired)
• Military discharge documentation
• Weapons permit (unexpired)
• Government assistance program document (that includes proof of identity)
• Statement of benefits from a qualifying program (that includes proof of identity)
• Unemployment or worker’s compensation statement of benefits

Or, show us 2 items:
To be accepted, both copies must have their first name and last name on them, and one must have their date of birth on it and the other must have their SSN on it.

Show their date of birth
• Driver’s license (unexpired)
• Birth certificate
• Passport (unexpired)
• Certificate of Naturalization (or Certificate of U.S. Citizenship)
• Permanent Resident Card (unexpired)

Show their SSN
• Social Security card
• Social Security Benefit Statement (SSA-1099)
• W-2
• Prior year’s state, federal, or Tribal tax return

Give us your documents.

Upload the file here

Choose file

Back   Next
Subscriber’s Agreement

Please have the subscriber initial next to each statement and sign this form to finish the process.

I understand that it is against the law to lie on this form and agree, under penalty of perjury, to the following statements:

Initial

I (or my dependent or other person in my household) currently get benefits from the government program(s) listed on this form or my annual household income is 135% or less than the Federal Poverty Guidelines (the amount listed in the Federal Poverty Guidelines table on this form).

...There are 9 total statements to initial.

Subscriber’s Signature

Type your full legal name (the same as you gave us before) below.

Jane Mary Smith

I understand this is a digital signature, and is the same as if I signed my name with a pen.

Scroll Down

The representative cannot certify and consent on the consumer’s behalf. The representative cannot enter the consumer’s e-signature of their behalf.

Note: The benefit recipient must be the one to initial with their initials, even when applying with a BQP.

Document Submission Complete!
*If the NV system is sending the eligibility check in real-time, the consumer will be redirected to the screen below.

We Are Checking Their Documents

We need to check their documents to make sure they qualify. When we finish, the status on your account dashboard will change.

This will take a few minutes.

Please come back when the status changes on your account dashboard.

If they qualify...

You will have 90 days to enroll Water Bottle in NLAD.

If they do not qualify...

We'll ask for more information or tell you what to do next. You will have until 3/6/2018 (Based on US Eastern Time) to send us the information or complete the next steps.
4b

If the applicant is found in a qualifying program within the state and they’ve upload documents for other failures, the user will see the following screen:

We Are Checking Their Documents
We need to check their documents to make sure they qualify. When we finish, **the status on your account dashboard will change.**

This will take a few minutes.
Please come back when the status changes on your account dashboard.

If they qualify...
You will have 90 days to enroll Water Bottle in NLOA.

If they do not qualify...
We’ll ask for more information or tell you what to do next. You will have until 3/6/2018 (Based on US Eastern Time) to send us the information or complete the next steps.

If the applicant is not found in a state’s qualifying program, the SP will need to select a qualifying program and upload corresponding documents on behalf of the consumer.

We Need More Information
To qualify for Lifeline, the subscriber needs to show that they qualify through a government assistance program or through their income.

Are they in any of these?
They will need to show proof that they are in the program they choose.

Choose one.
- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program (only choose if they live on tribal lands)
- They don’t participate in one of these programs, and want to qualify through income
- They are not in any of these programs, but their child or dependent is

← Back

Next →
You have completed the Service Provider NV Web Portal Experience section. In this section, you have learned:

• **A service provider can use the NV Web Portal to:**
  - Assist a consumer in applying / checking eligibility
  - Assist a consumer with submitting documentation
  - Check application statuses of submitted consumer applications

• **Service Provider Representatives will be able to access the NV Web Portal using two account categories** – SP Admin and SP Agent – which will correspond to four different user account categories in NLAD (SP Admin, SP Analyst, SP Ops, and SP Agent). Currently, all NV account types can perform the same functions in the NV Web Portal, but permissions among the four NLAD account types differs.

• **Service provider administrators can grant employees access to the NV Web Portal through one of the four NLAD user account types.** They will use their same NLAD credentials to log in to the NV Web Portal.
NLAD & the National Verifier
Before a service provider enrolls a new subscriber in Lifeline, NLAD will prompt them to confirm the consumers’ eligibility through the National Verifier.

Once the consumer is approved by the National Verifier, the service provider can enroll them in NLAD using the National Verifier mode.

During the soft launch, service providers have the option to use NLAD in the National Verifier or legacy mode.
National Verifier Toggle in NLAD

LIFELINE
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
Detail Subscriber Lookup
Lookup Subscriber

LOOKUP SUBSCRIBER

Subscriber Name and Personal Information
Last Name * | Date of Birth * | Last 4 SSN * - OR - Tribal ID *
First Name | Middle Name

Subscriber Address Information (Required)
Primary Address *
Apt, Unit, etc.
City * | State * | ZIP Code *

Search

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

ENROLL SUBSCRIBER

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.

City * State * ZIP Code *

Subscriber Telephone Information (Phone No. Is Optional to Verify.)

Service Type* Service Initiation Date *

Select one Lifeline Tribal Benefit? *

Phone Number *

Yes No
Questions?
Preparing to Use the National Verifier
Overview

• USAC is committed to helping service providers prepare to use the National Verifier
  • Series of trainings
  • Office hours (open sessions where SPs can ask questions)
  • Pre-production workshop (USAC will walk through end-to-end scenarios with SPs)
  • Pre-production environment
  • National Verifier Service Provider web page
  • Outreach emails and assistance: LifelineProgram@usac.org
National Verifier Pre-Production

• Pre-Production Environment: [https://training.checklifeline.org/lifeline](https://training.checklifeline.org/lifeline)
  • **Never** enter real consumer data in the pre-production environment
  • [Pre-production user guide available](https://training.checklifeline.org/lifeline), including
    • Successful transition data
    • Instructions for requesting USAC review of document upload

---

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National Verifier Training and Support

Trainings for March Launch:

- **March 21**: Checking Lifeline Eligibility
- **March 26**: Correcting Errors & Submitting Documents
- **April 2**: Topic TBD
- **April 4**: NV Processes for SPs without the SP Portal

Office Hours for March Launch:

- **March 26**: Topic TBD

* Please note, USAC will add additional office hours as needed/requested.*
Thank You!

• Thank you for joining us!

• If you received this webinar training invitation from another member of your team or know of others who should receive training invitations, please email us at LifelineProgram@usac.org to be added to the National Verifier training and outreach list for these states.

• Sign up for Lifeline Program email updates and upcoming events
  • Visit www.usac.org/li and click “Subscribe” in the upper right hand corner

• Need help? Contact us!
  • General: LifelineProgram@usac.org