National Verifier Overview
October 22, 2019

Universal Service
Administrative Co.

Housekeeping

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- 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**

Today's Presenters

Universal Service Administrative Co.

Catie Miller

Linnita Hosten

Course Overview

Universal Service Administrative Co.

01 | Introduction

- National Verifier Overview

02 | Getting Started

- Creating User Accounts and Credentials
- Creating an NV Application
- Checking Application Status
- Submitting Documentation
- NLAD & the National Verifier

03 | Resources

- Preparing to use the National Verifier

Introduction

WELCOME TO THE NATIONAL VERIFIER

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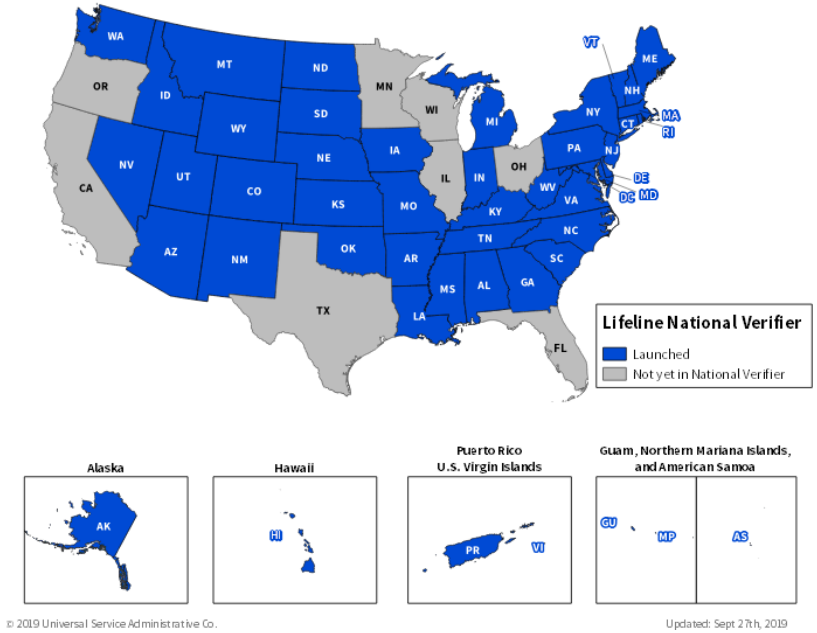

- The October 2019 group soft launched on October 11, 2019. This includes
  - Alabama
  - Arkansas
  - Louisiana
  - Massachusetts
  - Maryland
  - New Jersey
  - Oklahoma
  - Puerto Rico
  - South Carolina
  - Washington

National Verifier Overview

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- The National Verifier will determine consumer's Lifeline eligibility
- Service providers will no longer determine if 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

National Verifier Overview

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- 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

National Verifier Eligibility Checking

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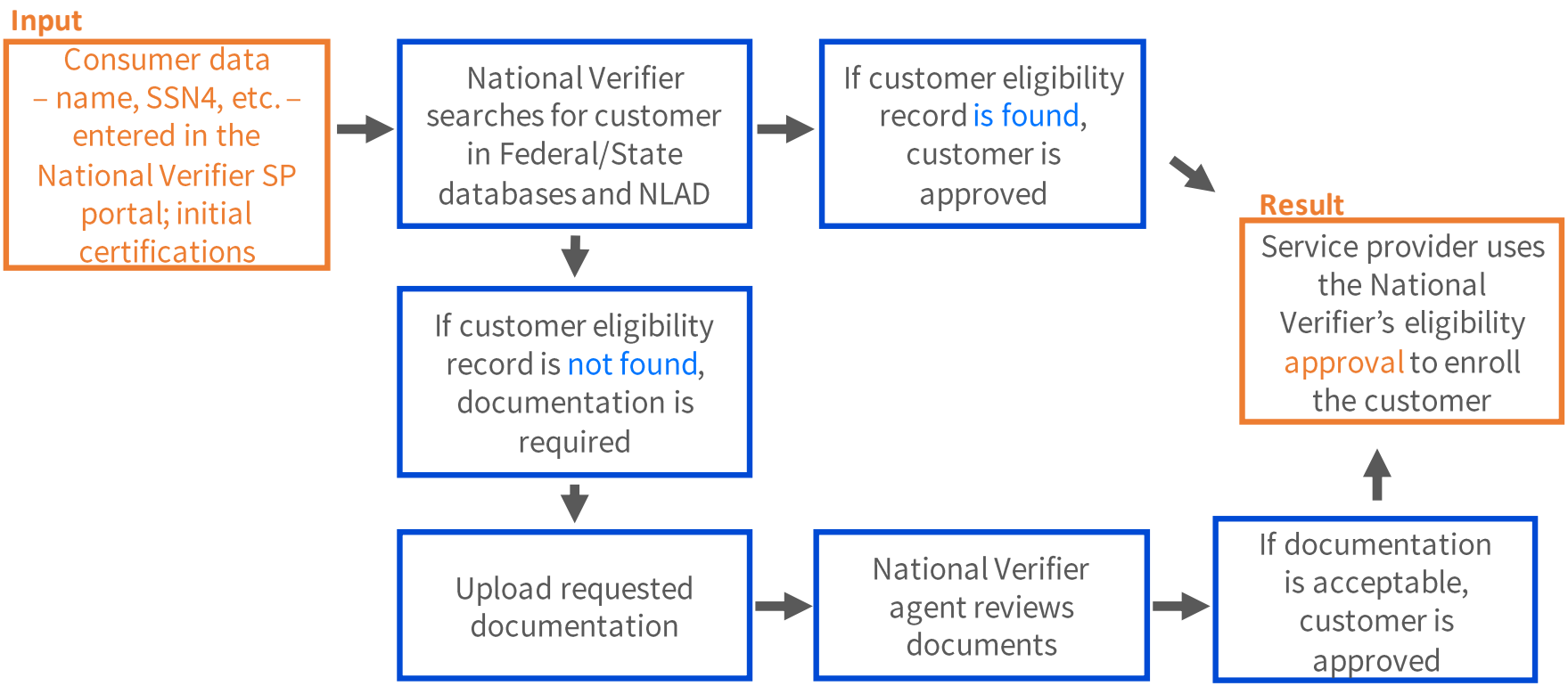

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Creating User Accounts and Credentials

Creating User Accounts and Credentials

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Service provider administrators can grant National Verifier service provider 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 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 (ETC Agent)** for sales associates who will access to the National Verifier service provider 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 service provider portal.

Creating User Accounts and Credentials

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There are **four different types of service provider user accounts** within NLAD that map to **two NV service provider 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**.

		NV SP Portal Permissions		
NLAD Account Types	**NV SP Portal Account Types**	**Check Eligibility**	**Upload Supporting Documents**	**View Dashboard of Applications Submitted for Review**
ETC Admin	**ETC Admin**	X	X	X
ETC Analyst				
ETC Ops				
ETC Agent	**ETC Agent**	X	X	X

ETC Agent credentials do not have permission to access NLAD.

Creating User Accounts and Credentials

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Service providers can create company associate credentials for the NV service provider 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 SP 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. If no matching account was found, **enter the new user's information.**

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

Full video demonstrations available here:

- http://www.usac.org/li/about/outreach/videos/NLAD-Admin-Creating-Subaccounts.aspx
- http://www.usac.org/li/about/outreach/videos/497-Officer-Creating-NLAD-Admin.aspx

Creating User Accounts and Credentials

Step 1: Create NLAD Sub-account

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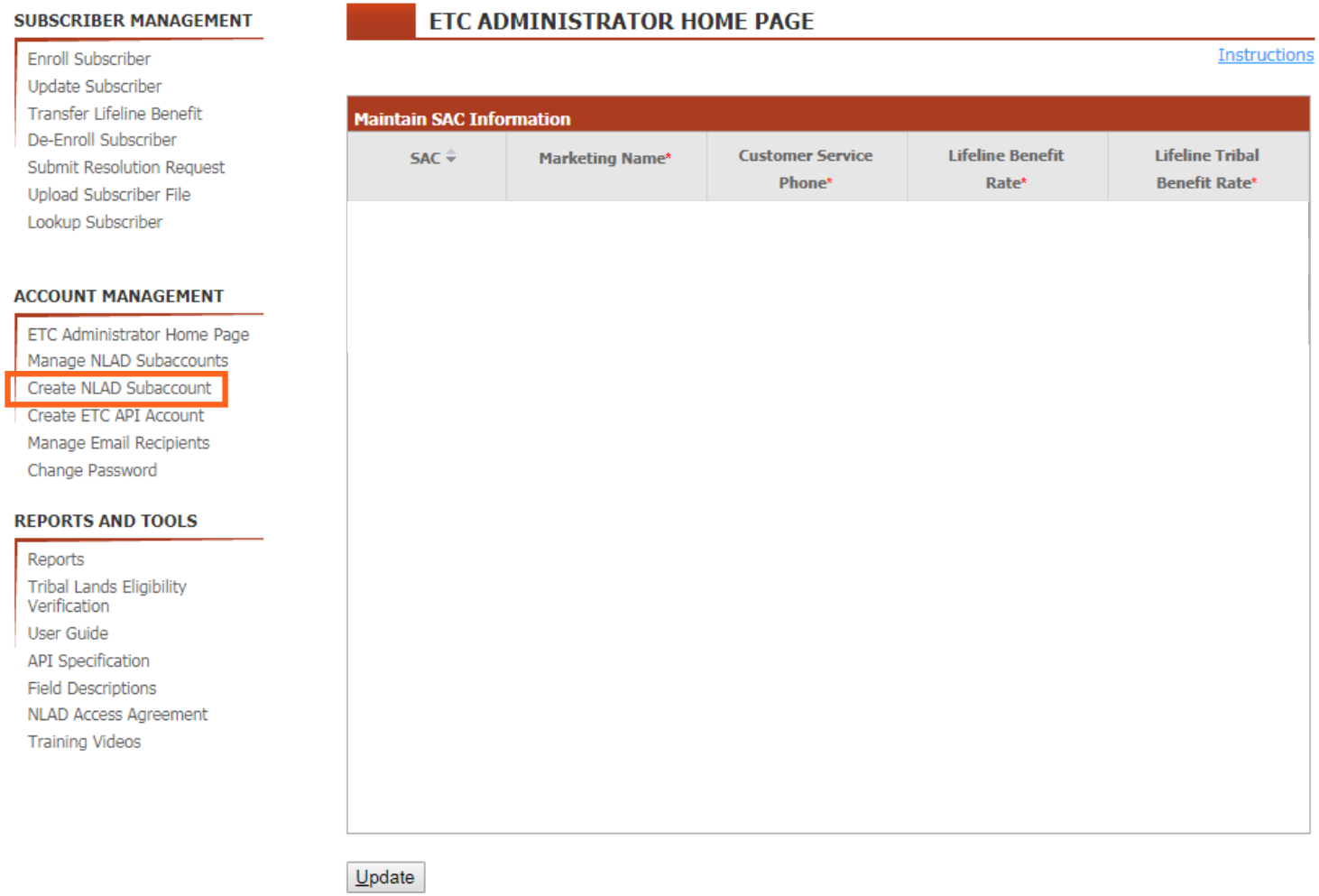
In NLAD, the ETC Admin user will navigate to the "**Account Management**" tab, and click "**Create NLAD Subaccount**".



Creating User Accounts and Credentials

Step 2: Enter E-mail Address

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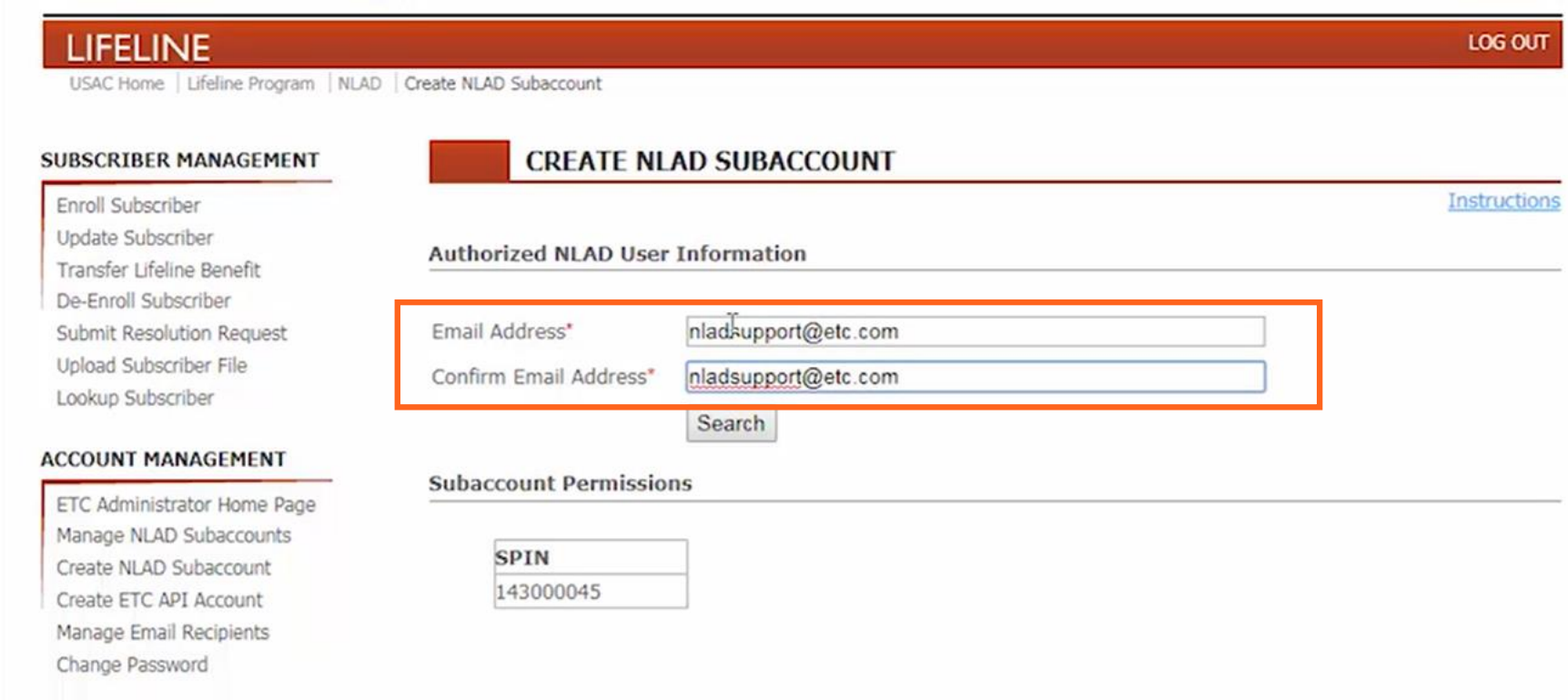
The ETC Admin user will enter the desired user's email address.



Creating User Accounts and Credentials

Step 3: Search for User Information

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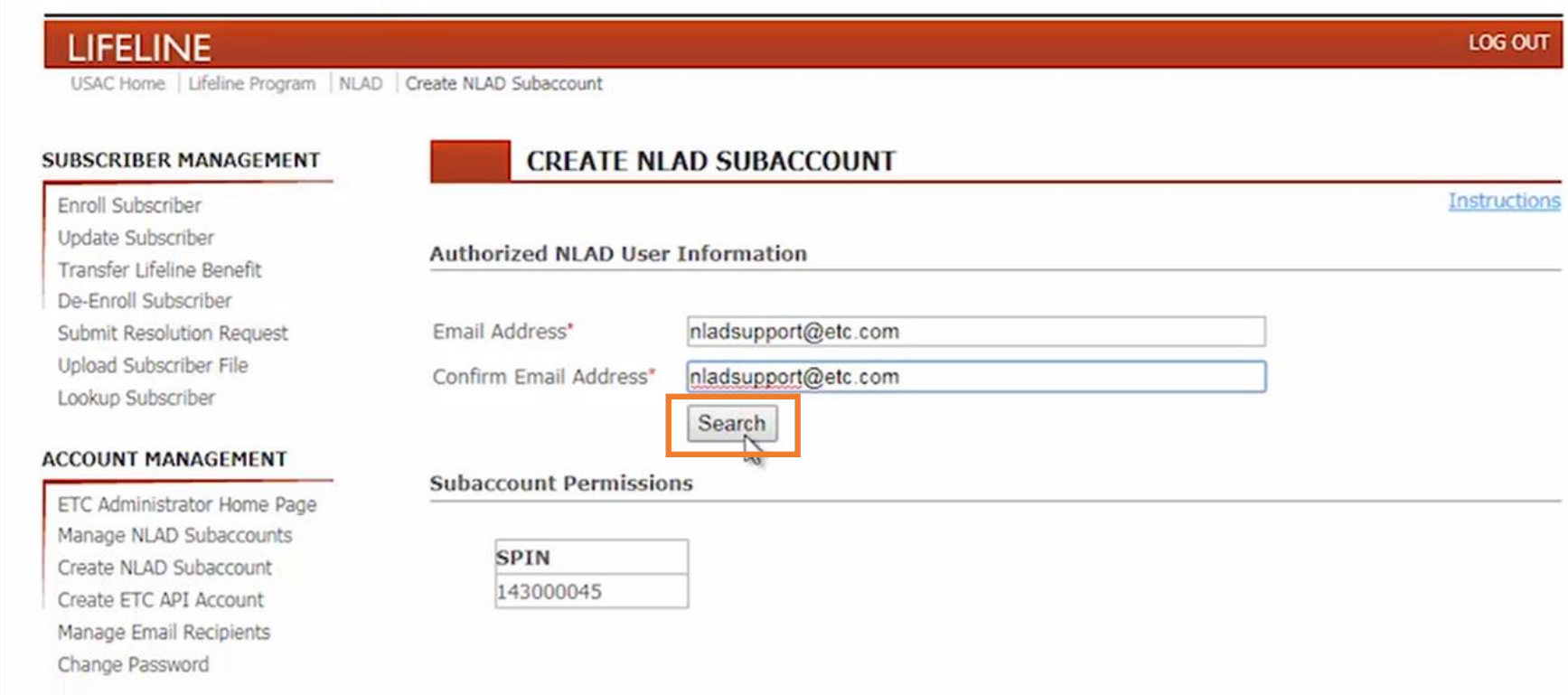
After entering the desired user's email address, the ETC Admin will click "Search" to locate the user's information. If their information is found, skip to Step 5.



Creating User Accounts and Credentials

Step 4: Enter New User Information

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

Creating User Accounts and Credentials

Step 5: Select Desired Role

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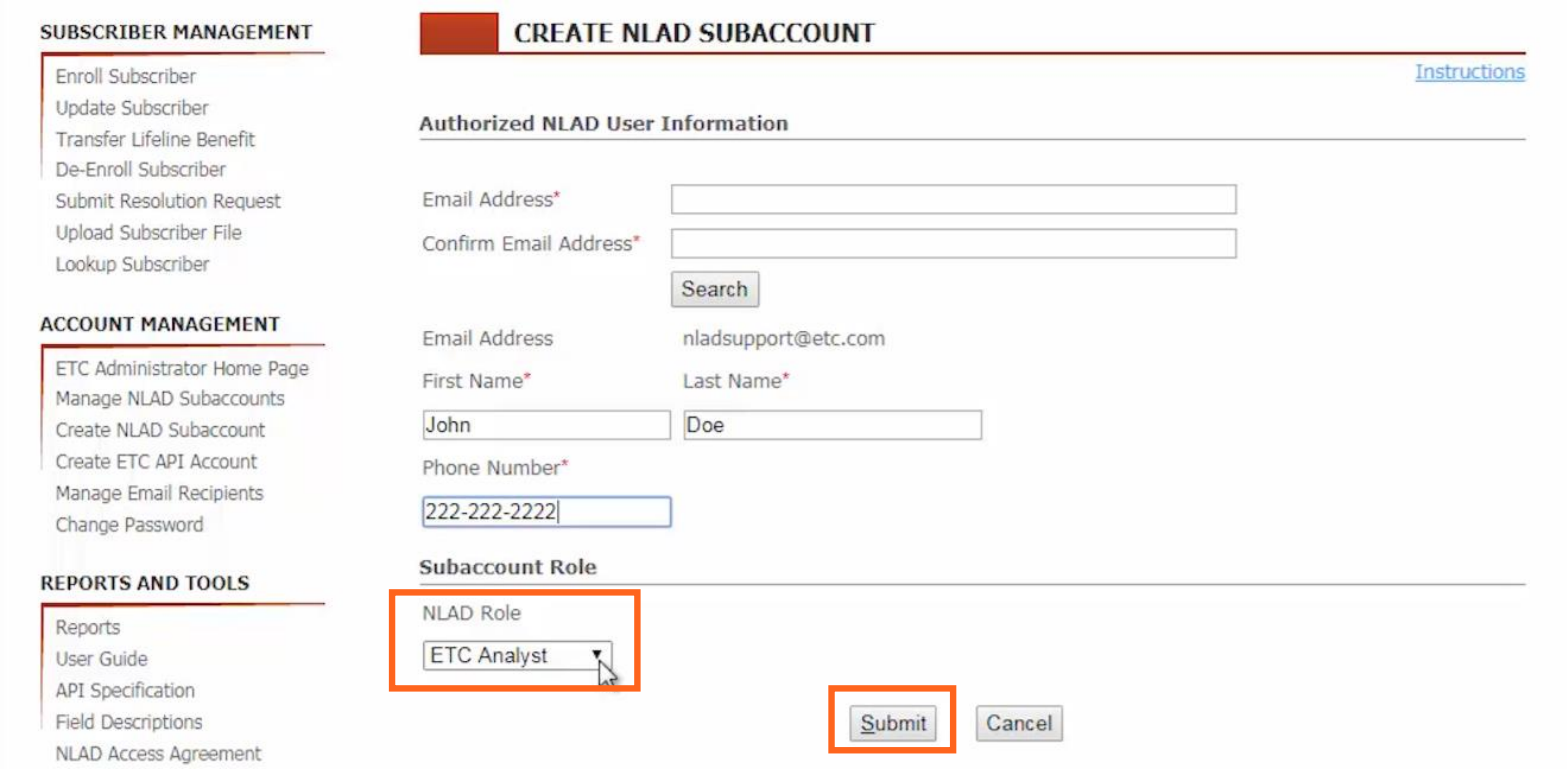
Select the desired role for the account from the "NLAD Role" drop-down menu (i.e. ETC Agent) and click "Submit".



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http://www.usac.org/li/about/outreach/videos/497-Officer-Creating-NLAD-Admin.aspx

Creating an NV Application

Creating an NV Application

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Once a service provider has created NV credentials in NLAD, they may start assisting consumers apply for Lifeline via the service provider portal. **The process for creating applications in the service provider portal is:**

1. Sign into your **service provider account** on the National Verifier homepage.
2. **Start a new application** in 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**

Creating an NV Application

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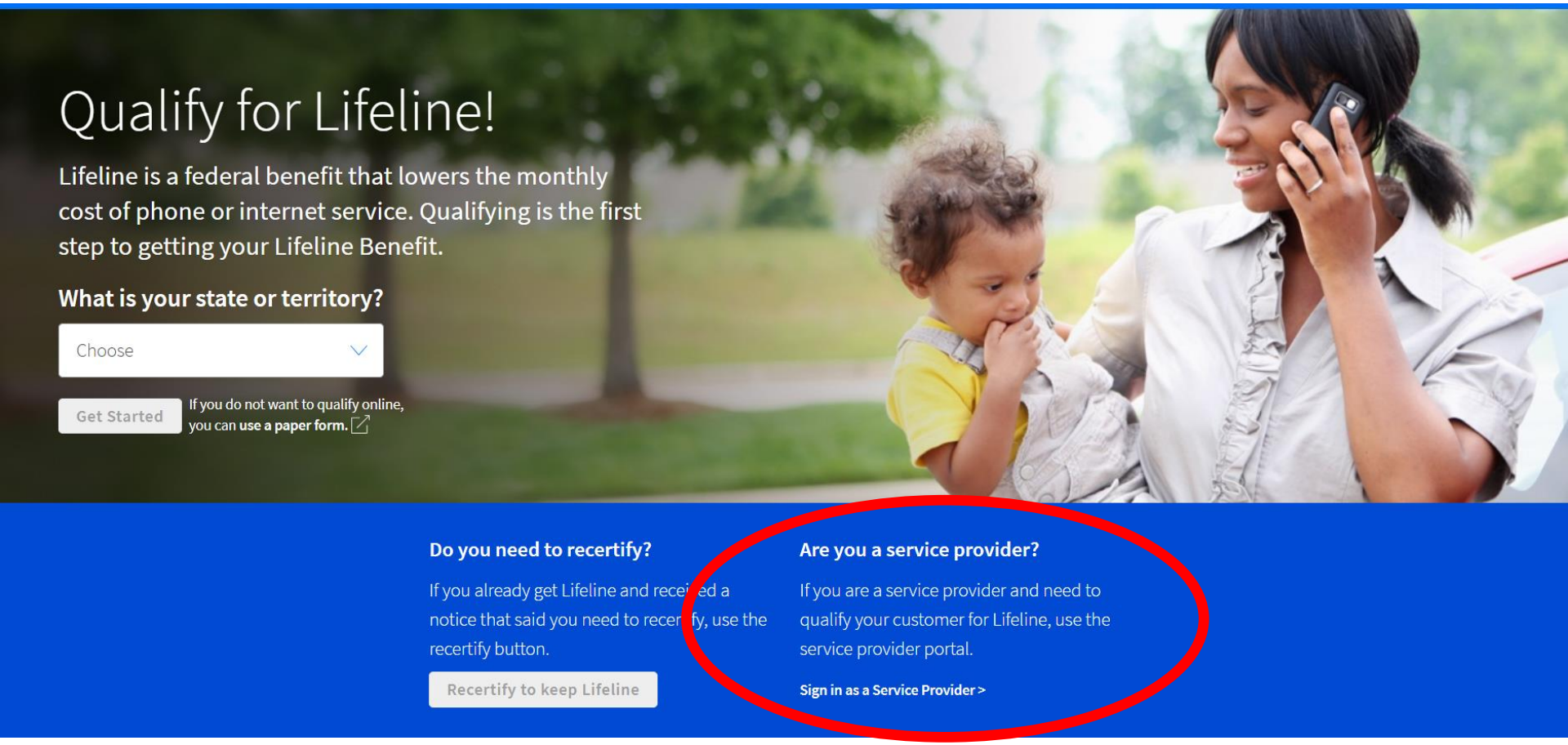
CheckLifeline.org



Creating an NV Application

Navigating the Home Page View

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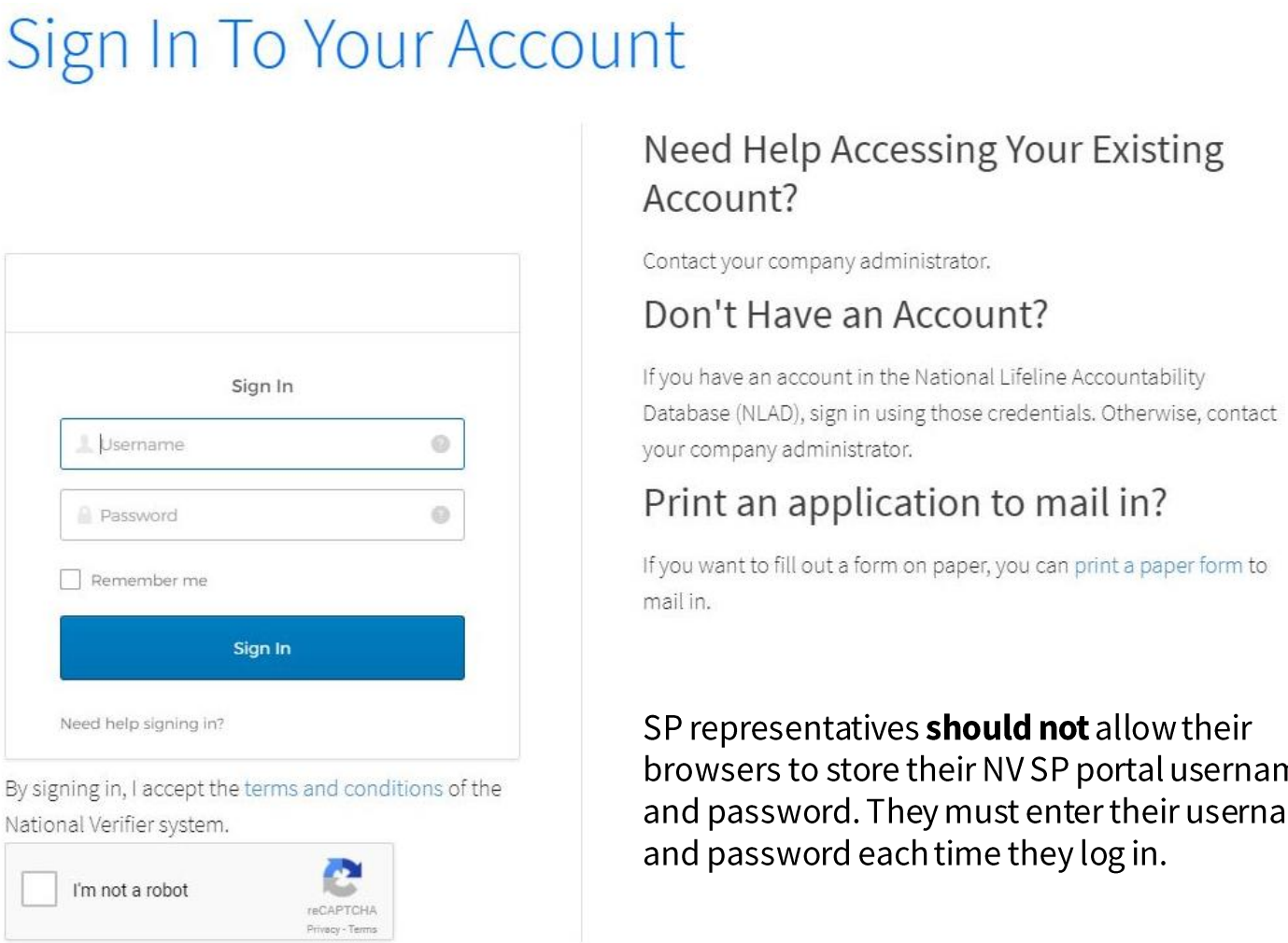
Once an ETC Admin grants an ETC user access, they will be able to go to service provider portal by navigating to **CheckLifeline.org**. They must log in below.



SP representatives **should not** allow their browsers to store their NV SP portal username and password. They must enter their username and password each time they log in.

Creating an NV Application

Navigating the Home Page View – Apply

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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.

Lifeline National Verifier

Your Account

- Go To NLAD
- Change Your Password in NLAD
- Sign Out

Welcome Service Provider Agent

Start New Application

Pending Applications

Displaying 25 of 642 records

Search:

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

Creating an NV Application

Navigating the Home Page View – Apply

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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.

First Name

Middle Name (Optional)

Last Name

Suffix (Optional)

What is their date of birth?

Month Day Year

MM DD YYYY

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

Give their Tribal Identification Number instead.

What is their Tribal Identification Number?

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.

Street Number and Name

Apt, Unit, etc.

City

State

Zip Code

Clear All

Next

OMB Control Number: 3060-0819 Paperwork Reduction Act Notice Privacy Act Statement

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.

Creating an NV Application

Navigating the Home Page View – Apply

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2

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 ?

Back | Next

3

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** **Chicago, IL 56789**

Edit

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

- [x] 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.

Back | Next

Creating an NV Application

Navigating the Home Page View – Apply

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3

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	
JS	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).

Scroll Down

…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.

Back

Submit

! 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).

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Checking Application Status

Checking Application Status

Navigating the Home Page View – Check Status

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Once a service provider has assisted a consumer in submitting an application, they will be able to see all pending applications they have submitted.

Lifeline National Verifier

Your Account

Go To NLAD
Change Your Password in NLAD
Sign Out

Welcome Service Provider Agent

Start New Application

Pending Applications

Displaying 25 of 642 records

Search:

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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

Submitting Documentation

Navigating the Home Page View – Submit Documentation

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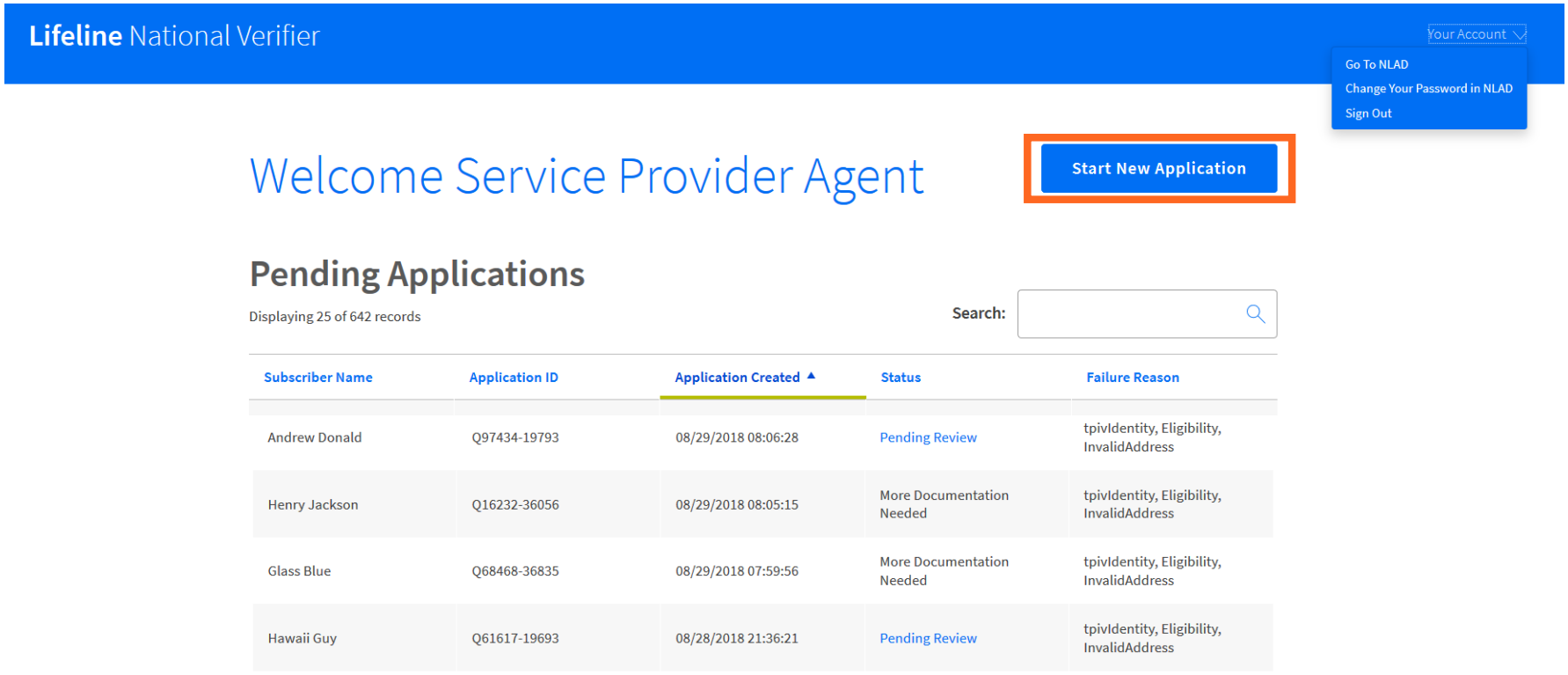
If a consumer requests assistance from a service provider representative in uploading documentation, they can help via their NV service provider portal account.

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 25-27 of this presentation for screenshots and guidance on creating new applications.



Submitting Documentation

Navigating the Home Page View – Submit Documentation

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1

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.

2

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

Submitting Documentation

Navigating the Home Page View – Submit Documentation

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3

Subscriber's Agreement

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Back

Submit

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

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Document Submission Complete!

Submitting Documentation

Navigating the Home Page View – Submit Documentation

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4 *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.

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NLAD & the National Verifier

Overview

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- 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

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USAC
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LIFELINE

LOG OUT

USAC Home | Lifeline Program | NLAD | Lookup Subscriber

National Verifier OFF

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

Instructions

Subscriber Name and Personal Information

Last Name * | Date of Birth * (MM/DD/YYYY) | 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

National Verifier Toggle in NLAD

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USAC
Universal Service Administrative Company

LIFELINE

LOG OUT

USAC Home | Lifeline Program | NLAD | Enroll Subscriber

National Verifier ON

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

SUBSCRIBER MANAGEMENT

- Enroll Subscriber
- Update Subscriber
- Transfer Lifeline Benefit
- De-Enroll Subscriber
- Submit Resolution Request
- Upload Subscriber File
- Detail Subscriber Lookup

ENROLL SUBSCRIBER

Instructions

Select SAC*

466666

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

Getting Started
Lesson Summary

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You have completed the "Getting Started" section. In this section, you have learned:

- A **service provider can use the service provider portal to**:
  - Assist a consumer in applying / checking eligibility
  - Assist a consumer with submitting documentation
  - Check application statuses of submitted consumers' applications
- **Service provider representatives will be able to access the service provider portal using two account categories** – ETC Admin and ETC Agent – which will correspond to four different user account categories in NLAD (ETC Admin, ETC Analyst, ETC Ops, and ETC Agent). Currently, all NV account types can perform the same functions in the service provider portal, but permissions among the four NLAD account types differs.
- **Service provider administrators can grant employees access to service provider portal through one of the four NLAD user account types**. They will use their same NLAD credentials to log in to the service provider portal.

Resources

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Preparing to Use the National Verifier

Resources

Preparing to Use the National Verifier

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USAC is committed to helping service providers prepare to use the National Verifier

- Series of training sessions
- Office hours (open sessions where SPs can ask questions)
- Pre-production environment
- National Verifier Service Provider web pages
- Outreach emails
  - Not receiving these? Email us at LifelineProgram@usac.org!

Resources

National Verifier Pre-Production

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- Pre-Production Environment: https://training.checklifeline.org/lifeline
  - **Never** enter real consumer data in the pre-production environment
- Pre-production user guide available, including
  - How to make your own test data
  - Instructions for requesting USAC review of document upload

Thank You!

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- **Thank you for joining us!**
- **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:** LifelineSupport@usac.org

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