October 2021 Monthly Webinar

Lifeline Program Updates

Universal Service Administrative Co.

DISCLAIMER:

To accommodate all attendees, real-time closed captions will be present during this presentation. This is a new feature we are testing out to improve webinar accessibility for all. We understand it is a significant change and appreciate your patience. We apologize in advance for any transcription errors or distractions. Thank you for your support.

Housekeeping

- Audio is available through your computer's speakers

- The audience will remain on mute

- Enter questions at any time using the "**Questions**" box

- If your audio or slides freeze, restart the webinar

- A copy of the slide deck is in the "**Handouts**" section of webinar panel

Meet Our Team

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Today's Objectives

- Review Lifeline program updates
  - Ensure service providers are aware of Lifeline program updates
  - Educate service providers on how to prepare for Lifeline program system enhancements

Agenda

- Announcements
  - COVID-19 Waivers
  - Hurricane Ida Waivers
- National Lifeline Accountability Database (NLAD) Enhancements
  - Application ID Enrollment
    - NLAD User Interface
    - Batch File Process
    - API
  - Update Lifeline Subscriber Enhancement
- Resources

Announcements

Announcements
Reminder: COVID-19 Waivers Extended

- On **September 22, 2021**, the Wireline Competition Bureau (Bureau) extended the waivers governing recertification, reverification, general de-enrollment, and income documentation through December 31, 2021

- On **September 22, 2021**, the Bureau also extended the waiver regarding documentation requirements for subscribers residing in rural areas on Tribal lands through December 31, 2021

- ***Reminder****: The waiver governing FCC's Lifeline non-usage rule ended May 1, 2021*

- USAC will continue to temporarily accept driver's licenses or state identification cards that have expired on or after March 1, 2020, when needed to complete any Lifeline applications

Announcements
Hurricane Ida Waivers

- On September 3, 2021, the Bureau issued Order DA 21-1107 waiving certain Lifeline rules and deadlines to assist participants located in the areas affected by Hurricane Ida. This Order identifies the "Affected Disaster Areas" as all parishes and counties in Louisiana and Mississippi

- For subscribers residing in the Affected Disaster Areas, this Order temporarily waives, **through November 30, 2021**, the Lifeline non-usage rules that require a service provider to de-enroll Lifeline subscribers who do not pay a monthly fee for their Lifeline-supported service, do not use that service for 30 consecutive days, and do not cure their non-usage within a 15-day period

Announcements
Hurricane Ida Waivers

- At the end of the waiver period, Lifeline subscribers subject to the non-usage rule and residing within the impacted areas will have 30 days to use their Lifeline service. If the subscriber does not use their Lifeline service during the 30-day window, the 15-day notice period will begin on December 31, 2021

- Service providers in the affected disaster areas that are unable to comply with the Lifeline non-usage requirements at the end of the waiver may request tailored relief from the FCC

National Lifeline Accountability Database (NLAD) Enhancements
Application ID Enrollment

Application ID Enrollment Overview

- The Application ID Enrollment feature will help service providers streamline enrollment and transfer transactions for the Lifeline program

- The Application ID Enrollment workflow provides an alternative verification, enrollment, and transfer process that requires limited personally identifiable information (PII)

  - This functionality will be available to service providers by the end of October
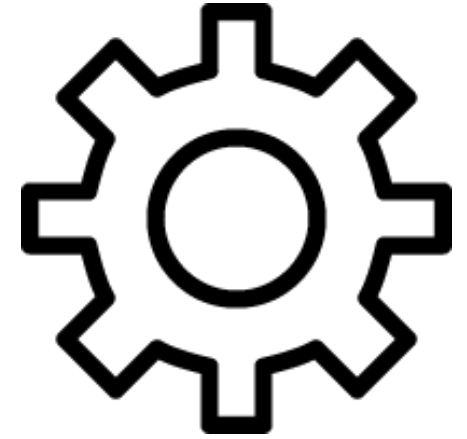
Application ID Enrollment
NLAD User Interface

- Service providers can complete **Verify**, **Enroll**, and **Transfer** transactions with a consumer's Application ID of a qualified application in the National Verifier

- Service providers will be able to select the "Application ID Enrollment" checkbox to complete the Application ID Enrollment workflow

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Application ID Enrollment
NLAD User Interface

- The Application ID Enrollment enhancement will allow service providers to perform Verify, Enroll, and Transfer functions using a consumer's:

  - National Verifier Application ID

  - First Name & Last Name

  - Date of Birth

- Benefit qualifying person (BQP) information is not required to perform verify, enroll, or transfer transactions using the Application ID Enrollment feature

Application ID Enrollment
NLAD User Interface

- The NLAD user interface Application ID Enrollment workflow requires the following fields:

• SAC • Application ID • transactionType • transactionEffectiveDate • First Name • Last Name	• Date of Birth • PhoneNumber • Service Type • Service Initialization Date • LifelineTribalBenefitFlag

Application ID Enrollment
Batch File Process

Application ID Enrollment
Batch File

- Service providers can perform Verify, Enroll, and Transfer transactions for multiple consumers with their Application ID from the National Verifier via the batch file process

  - The [APP ID Enroll NLAD Input Template](#) is available to service providers. The template includes a new field header "applicationID"

- **The following fields are required for Verify, Enroll, or Transfer transactions using the batch file process:**

• ApplicationId • transactionType • transactionEffectiveDate • sac • firstName	• lastName • dob • serviceInitializationDate • serviceType • LifelineTribalBenefitFlag • RepId or repNotAssisted

- **NOTE**: Service providers are not required to utilize the new batch file template that includes the "ApplicationID" field. The [existing batch file template](#) remains available.

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Application ID Enrollment
API

Application ID Enrollment
API

- Service providers can perform Verify, Enroll, and Transfer transactions for consumers with their Application ID from the National Verifier via an API connection

  - NLAD will accept the "applicationId" field via a service provider API request

- **The following fields are required for a Verify, Enroll, or Transfer transactions using the API:**

• ApplicationId
• transactionType
• transactionEffectiveDate
• sac
• firstName

| |
|---|
| • lastName |
| • dob |
| • serviceInitializationDate |
| • serviceType |
| • LifelineTribalBenefitFlag |
| • RepId or repNotAssisted |

- **NOTE**: Service providers are not required to utilize the Application ID workflow through API and do not need to include the new "applicationId" field in their requests. This is an optional field.

Application Enrollment ID
Reminders

Service providers are not required to complete the Application ID Enrollment workflow.

- Existing workflows remain available and all changes related to the Application ID are optional

- The Application ID Enrollment workflow is only available for the following transactions:
  - Verify
  - Enroll
  - Transfer
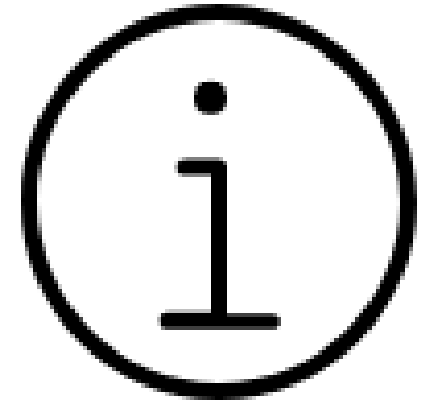
Application Enrollment ID
Additional Information

- Service providers must provide consumer PII and the required fields for the appropriate transaction type to complete successful transactions
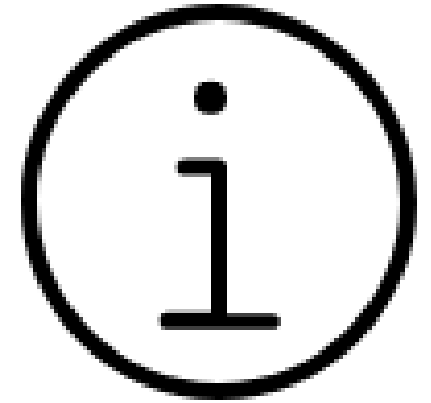
Questions?

Update Lifeline Subscriber Enhancement

Update Lifeline Subscriber Enhancement
Background

- USAC will also streamline the process for service providers to perform updates to a subscriber's record **without** their full PII

- With the consumer's Subscriber ID or Telephone Number, service providers will be able to perform update transactions via NLAD

Update Lifeline Subscriber Enhancement
Current Process

- The **Update Lifeline Subscriber** workflow allows providers to submit changes to a Lifeline subscriber's record in NLAD

- The following fields are required for providers to perform an update transaction:

<table>
<tr>
<td>

- transactionType
- subscriberID or phoneNumberinNLAD
- transactionEffectiveDate
- sac
- firstName
- lastName
- DOB

</td>
<td>

- serviceType
- serviceInitializationDate
- LifelineTribalBenefitFlag
- SSN4/Tribal ID
- PrimaryAddress
- RepId or RepNot Assisted

</td>
</tr>
</table>

- **All PII from the subscriber's enrollment record must be provided on an update transaction**

- **NOTE**: Service Providers must provide BQP information or mailing address if they were included on the subscriber's enrollment record.

Update Lifeline Subscriber Enhancement
New Process (Optional)

- Service providers will see a new field called "updateInd" in the new **Update Lifeline Subscriber** workflow that is available via batch file and API requests

  - The new process is not available in the NLAD user interface

  - If the indicator field is included in a batch or API transaction, the following values will be accepted:

    - 0, 1, or blank

    - **Example:** updateInd: "1"

- If the **updateInd** = "1", the following fields are required (batch and API):

• transactionType • subscriberId or phoneNumberInNLAD • transactionEffectiveDate • sac • lastName

• serviceType • serviceInitializationDate • LifelineTribalBenefitFlag • RepId or RepNotAssisted

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Update Lifeline Subscriber Enhancement
Additional Information

- The following fields should **not** be submitted when a provider is utilizing the update Lifeline subscriber workflow:

  - First Name

  - DOB

  - SSN4/ Tribal ID

  - BQP information (FN, LN, DOB, SSN4/Tribal ID)

  NOTE: The fields above can not be updated for a subscriber in the Lifeline program. Changing this information will require a de-enroll/re-enroll.

Update Lifeline Subscriber Enhancement
Additional Information

- A subscriber's address can still be updated through the new **Update Lifeline Subscriber** workflow process

- If an address is included in the update transaction where updateInd = 1, then the system will treat the address as an address update

  - The system does not validate an *address change*; the system recognizes this update as an address update
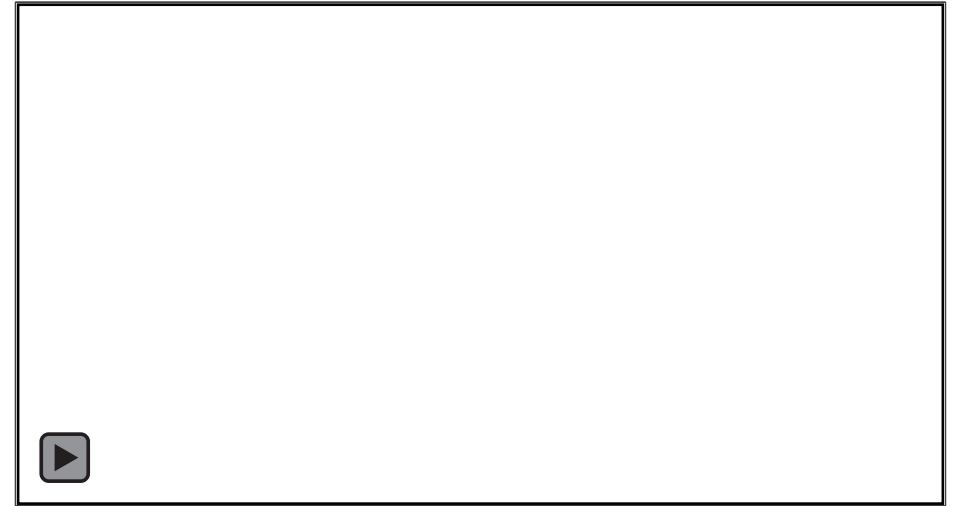
Questions?

Resources

Access the NLAD User Guide

- The NLAD User Guide provides detailed information on various NLAD functions

  - Included on this slide is an instructional video detailing how to access the NLAD User Guide

  - Several NLAD instructional videos are available on the Lifeline: Learn page of the USAC.org website

Subscribe to Lifeline's Newsletter

- [Subscribe](#) to Lifeline's monthly newsletter
  - **Select "Lifeline Program Newsletter" in USAC's subscription center**
  - You will receive monthly emails about program changes, updates, enhancements, and reminders about program compliance
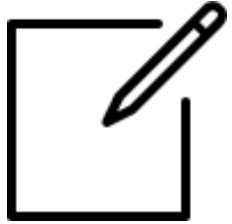
Connect with a Program Analyst

- Email LifelineProgram@usac.org to connect with a program analyst for any questions about Lifeline requirements

Questions?

Take Our Survey

- We want to hear about your webinar experience

- Expect an email from invites@mailer.surveygizmo.com with a unique survey link in 1-2 business days

- We appreciate your feedback

Thank You!