Lifeline Program
Getting Started with NLAD

April 13, 2022

Universal Service
Administrative Co.

DISCLAIMER

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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 the webinar panel**

Meet Our Team

Winta Woldu

Communications Specialist | Lifeline

Winta creates website content and training for consumer advocates, consumers, and service providers

Tiffany Johnson

Manager of Communications| Lifeline

Tiffany manages all communications for Lifeline, including state and federal partnerships

Objectives

At the end of the session, you will…

…be able to:

- Navigate the National Lifeline Accountability Database (NLAD)
- Enroll a subscriber in NLAD

…understand:

- The high-level functionality of the NLAD system
- The different types of NLAD user accounts
- The role and responsibility of service providers when using NLAD

Agenda

- Announcements
- Program Overview
- National Lifeline Accountability Database (NLAD) overview
- Lifeline Subscriber Management
  - Portal
  - Batch Upload
  - API
- Resources

Announcements

Announcements

COVID-19 Waivers Extended

- On March 25, 2022, the Wireline Competition Bureau (Bureau) extended the waivers governing recertification, reverification, general de-enrollment, and income documentation through June 30, 2022
- On March 25, 2022, the Bureau also extended the waiver regarding documentation requirements for subscribers residing in rural areas on Tribal lands through June 30, 2022
- 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 Lifeline applications through June 30, 2022

Announcements

2022 Federal Poverty Guidelines Updated

- The 2022 Federal Poverty Guidelines (FPG) were released on January 12, 2022
  - These guidelines determine if a consumer can qualify for Lifeline through income
- USAC updated the income thresholds on the Lifeline Application and Recertification forms, consumer outreach (mail and email), and website content
- Service providers should update their forms and systems as soon as possible
- Service providers that have state-issued forms should follow their state's guidance

Program Overview

Program Overview

Lifeline Program

- Eligible program participants can receive a discount of up to $9.25 per month
- Program participants who live on qualifying Tribal lands can receive enhanced support of up to $34.25 per month
- Discount may apply to qualifying fixed **or** mobile services
  - Can be applied to voice, broadband, or bundled services that meet the minimum service standards
- **Link Up**: a Tribal lands one-time benefit up to $100 for initial set up fees at residences in specific areas

Application Process

Consumers may apply to the Lifeline program using **one** of the three options:

Option 1:
Apply Online

- The consumer visits NV.FCC.gov from any computer or mobile device to complete the electronic application and upload any required documentation
- If approved, the consumer contacts a participating service provider to enroll in Lifeline

Option 2:
Apply by Mail

- The consumer fills out and signs the Lifeline Application Form
  - English Form
  - Spanish Form
- The consumer mails the application and supporting documentation to the Lifeline Support Center

Option 3:
Apply Through a Service Provider

- The consumer may apply with the assistance of a service provider
- Service providers may submit an online application on the consumer's behalf (only with the consumer's consent) using the National Verifier service provider portal (also available at NV.FCC.gov), or
- Consumers may also apply through the service provider's website, if the provider has elected to use the National Verifier Eligibility Check API

Questions?

National Lifeline Accountability Database (NLAD) Overview

National Lifeline Accountability Database (NLAD)

Background

The **National Lifeline Accountability Database (NLAD)** is the system that service providers use to manage their Lifeline subscribers, including enrolling consumers in the program, transferring and de-enrolling subscribers, and reviewing reports about their Lifeline subscribers

- Service providers must enroll subscribers in NLAD in order to claim reimbursements
- NLAD is available through USAC's One Portal system, which allows users to access all of their Universal Service Fund IT applications through the same portal
- All account types for NLAD and the National Verifier are created in NLAD
- For more information about NLAD, visit the NLAD section of USAC's website

National Lifeline Accountability Database (NLAD)

Account Types (1 of 2)

497 Officer

Must certify reimbursement claims and manages the ETC Administrator user role in NLAD

ETC Administrator

Manages subaccounts (Analyst, Operations, and Agent) and can perform subscriber transactions, query subscriber data, and view reports

User also has access to the National Verifier to check consumer eligibility

National Lifeline Accountability Database (NLAD)

Account Types (2 of 2)

ETC Analyst

This user can perform subscriber transactions, query subscriber data, and view reports

User also has access to the National Verifier to check consumer eligibility

ETC Operations

This user can query subscriber data and view reports

User also has access to the National Verifier to check consumer eligibility

ETC Agent

This user **only** has access to the National Verifier to check consumer eligibility

- To perform transactions in NLAD and the National Verifier, service provider representatives must register for a Representative ID (Rep ID)
- The Rep ID is used to create the representative's NLAD and/or National Verifier credentials

National Lifeline Accountability Database (NLAD)

Transaction Methods

Service providers can perform transactions in NLAD using the following methods:

1. **Individual Transactions (Portal):** Providers can perform individual transactions for one consumer at a time in the NLAD user interface (UI)
2. **Batch Upload:** Providers complete a batch template (CSV format file) to perform multiple transactions from a single file upload in NLAD
3. **NLAD API:** Providers can use an Application Programming Interface (API), which connects their billing or customer management system directly to NLAD to perform transactions

National Lifeline Accountability Database (NLAD)

Transaction Types

- **Verify:** Allows a provider to pre-validate whether a subscriber enrollment would successfully process in NLAD
- **Enroll:** Enrolls a new subscriber in Lifeline and adds consumer to the service provider's NLAD subscriber records
- **Transfer:** Transfers an existing Lifeline subscriber from their current service provider in NLAD to allow the transacting provider to enroll the subscriber in the Lifeline program
- **Update:** Allows a provider to update a subscriber's information such as the subscriber's contact information
- **De-Enroll:** Removes, or de-enrolls, a subscriber who is no longer eligible to receive Lifeline from NLAD

National Lifeline Accountability Database (NLAD)

Keep NLAD Up-to-Date

- The FCC's Lifeline program rules require all service providers to keep NLAD up-to-date:
  - Service providers must update NLAD every time a customer enrolls or de-enrolls in Lifeline, or changes their account information
  - Service providers must update NLAD within ten (10) business days of receiving the change (for example, change of address or name change)
  - When a service provider de-enrolls a subscriber from Lifeline, NLAD must be updated within one (1) business day
  - Service providers are responsible for managing their own user roles

Reminder: To perform applicable NLAD transactions, NLAD users are required to register for a Rep ID and have that Rep ID linked to their account. For more information, visit the RAD Resources page

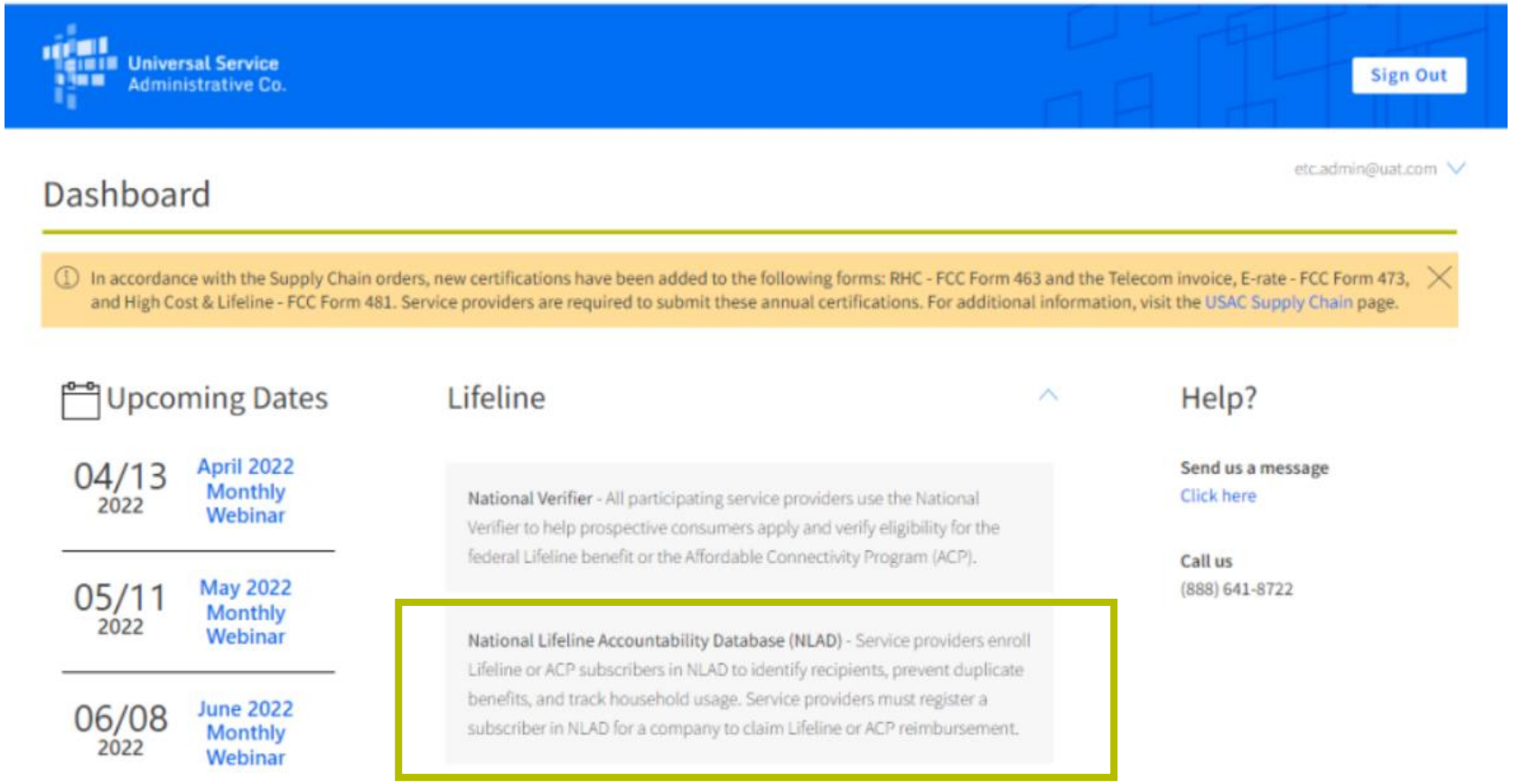
Questions?

Lifeline Subscriber Management

Lifeline Subscriber Management - Portal

Sign In

- Access NLAD through [One Portal]

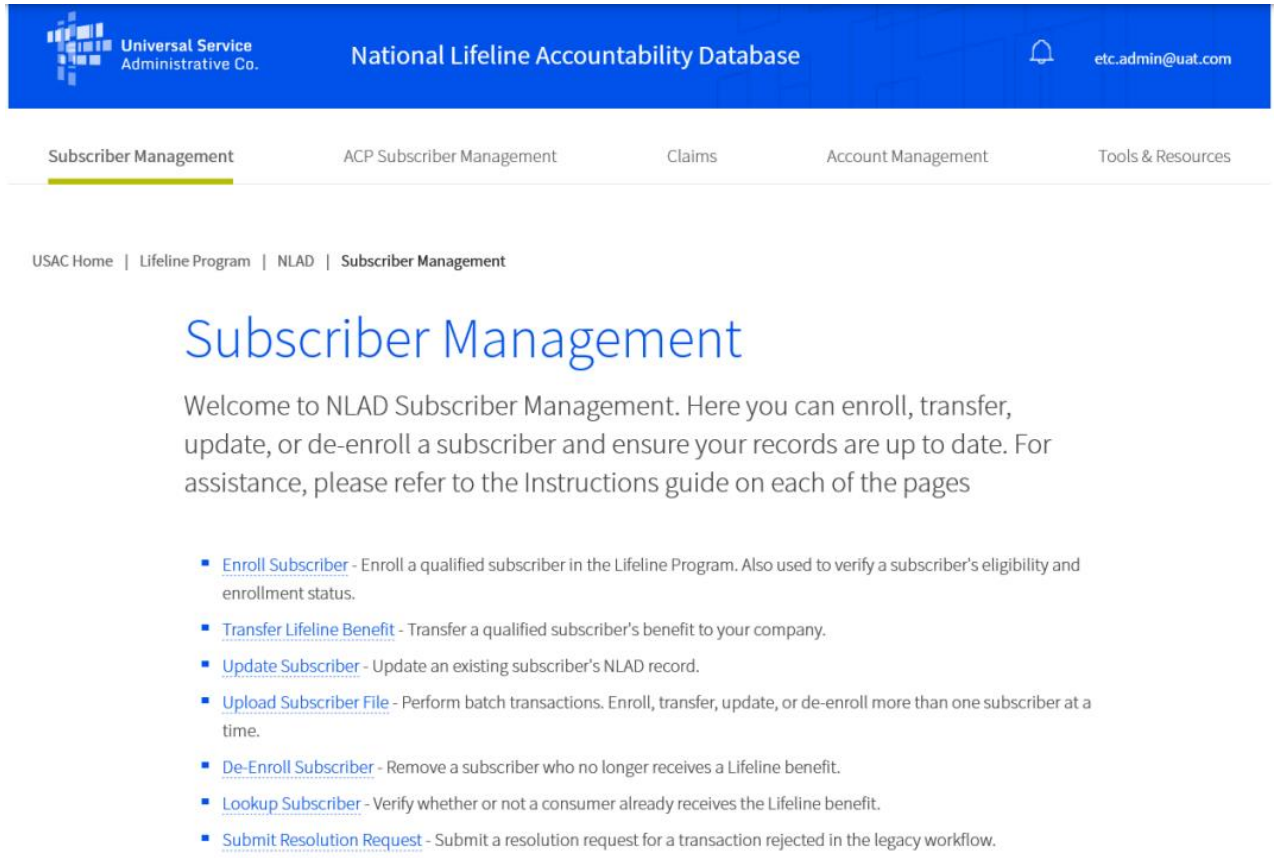


Lifeline Subscriber Management – Portal

Home Page

The home page will differ depending on the user's assigned role in NLAD

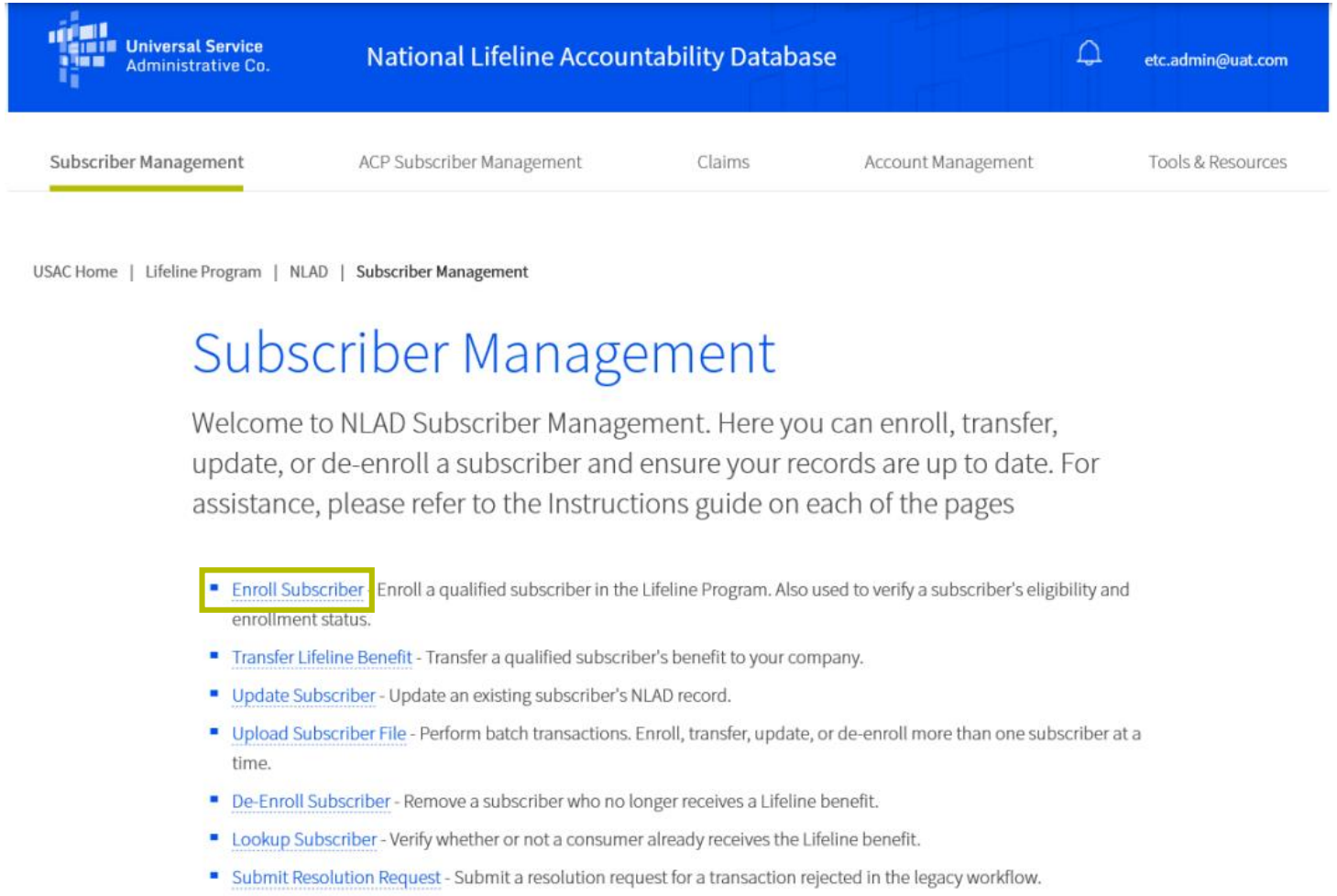
- Select **Subscriber Management** to see the types of transactions you user role can perform
- Select **Tools and Resources** to view reports, user guides, API specifications, field descriptions and more



Lifeline Subscriber Management - Portal

Enroll Subscriber

- From the **Enroll Subscriber** workflow, you can verify a subscriber's information and/or directly enroll them into NLAD



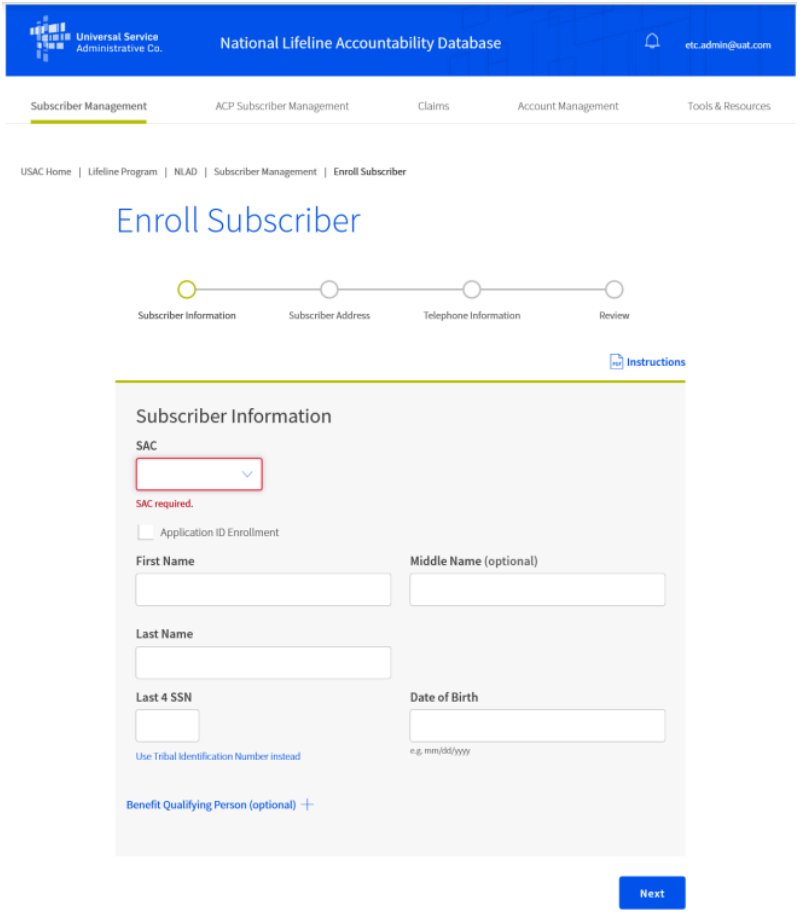
Lifeline Subscriber Management - Portal

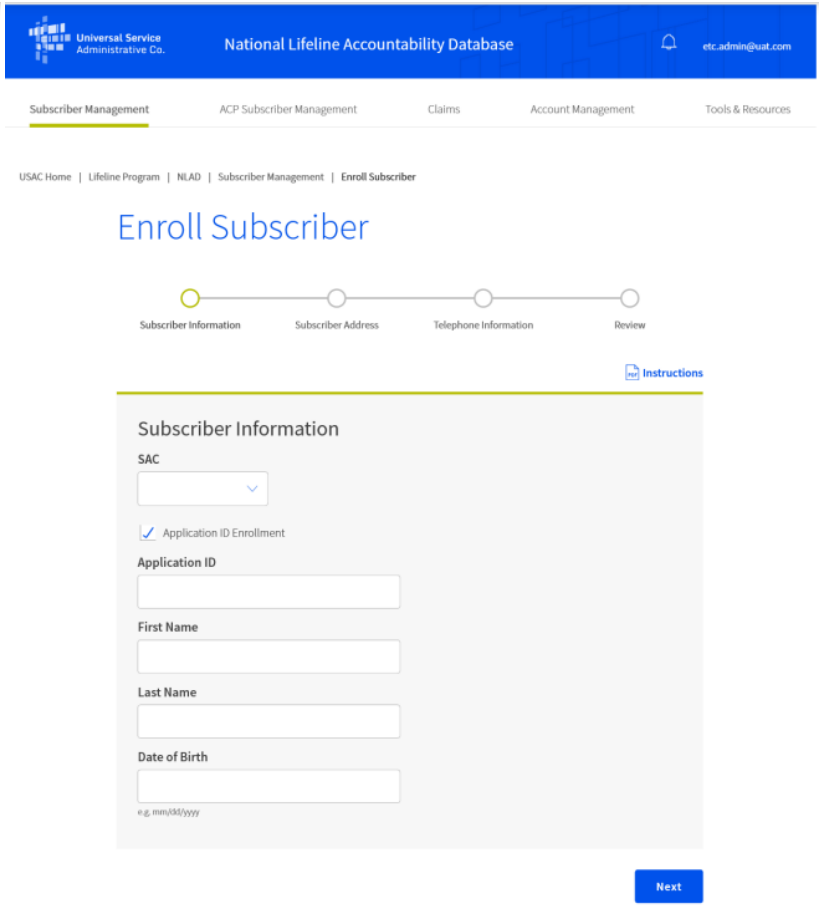
Enroll Subscriber

- Fill in the consumer's information (first name, last name, date of birth, SSN4 or Tribal ID - if applicable, and address)

  OR

- Select the checkbox "Application ID Enrollment" and fill in the relevant fields (first name, last name, date of birth, and Application ID)

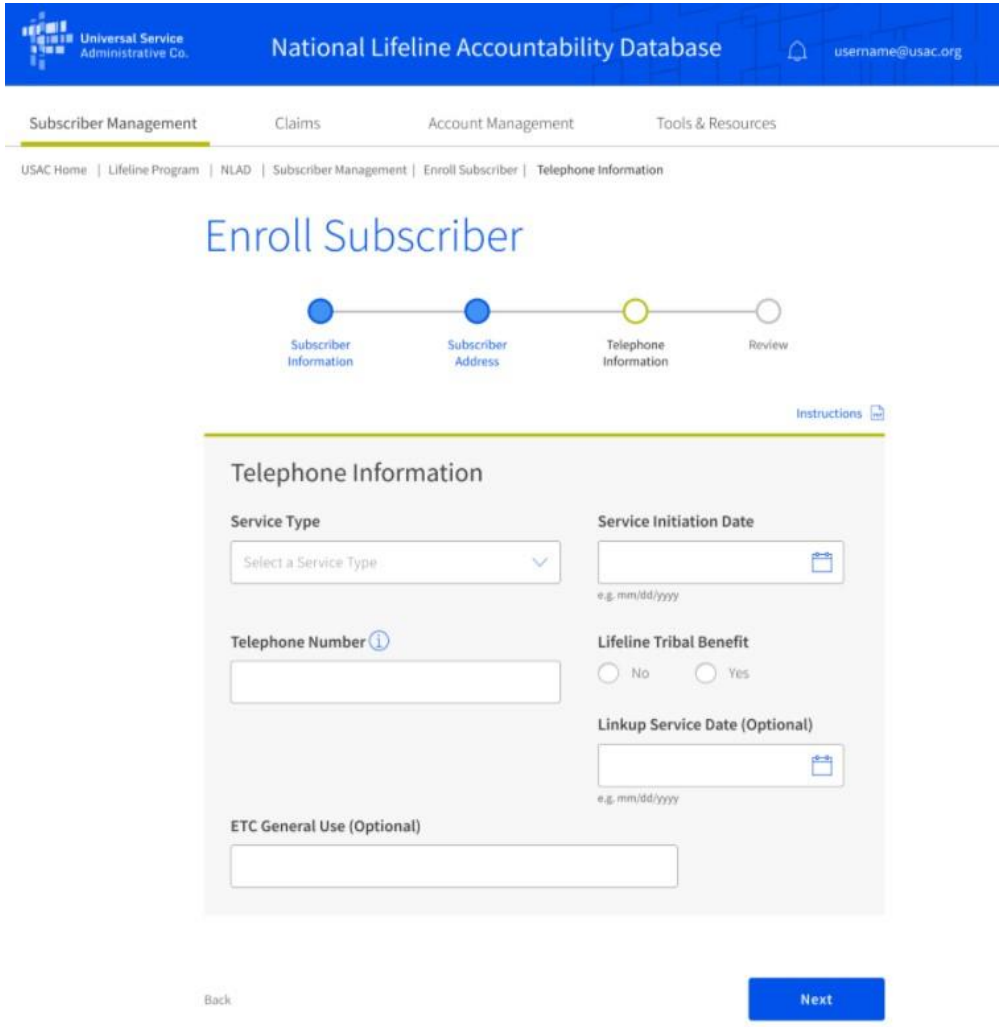




Lifeline Subscriber Management - Portal

Service Information (1 of 2)

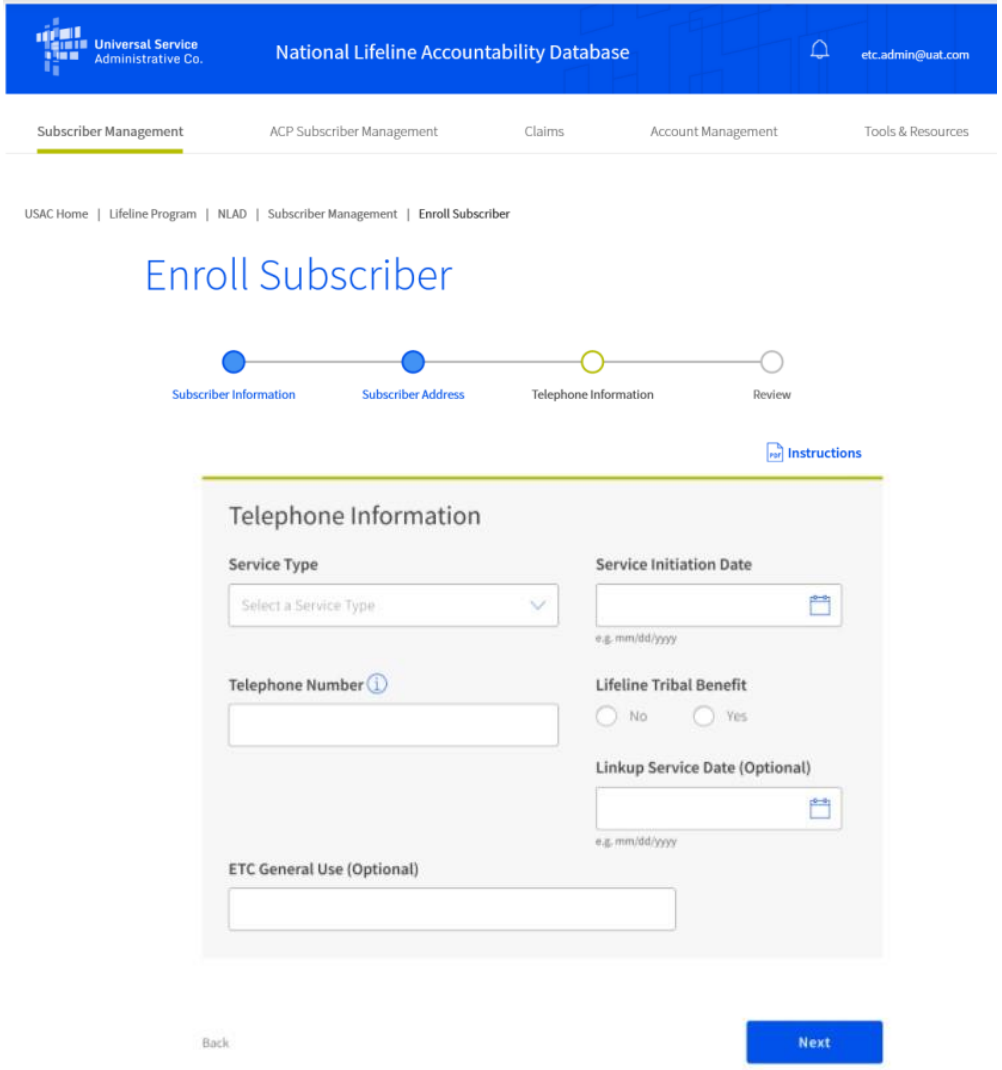
- Enter in the consumer's service information:
  - **Service Type:** Subscriber's Lifeline service offering: Voice, broadband, bundled-voice, bundled-broadband, bundled-voice, and broadband
  - **Service Initiation Date:** Date the service provider initiated Lifeline service
  - **Telephone Number:** Subscriber's phone number (if applicable)



Lifeline Subscriber Management - Portal

Service Information (2 of 2)

- **Lifeline Tribal Benefit**: Required field to claim Lifeline Tribal support for a qualified subscriber, this field will not appear if the subscriber's address falls on non-Tribal lands
- **Linkup Service Date**: Date of Linkup Service (mm/dd/yyyy format)
- ETC General: Optional field that some carriers use to enter a subscriber's account number or to track the subscriber in their internal systems



Lifeline Subscriber Management - Portal

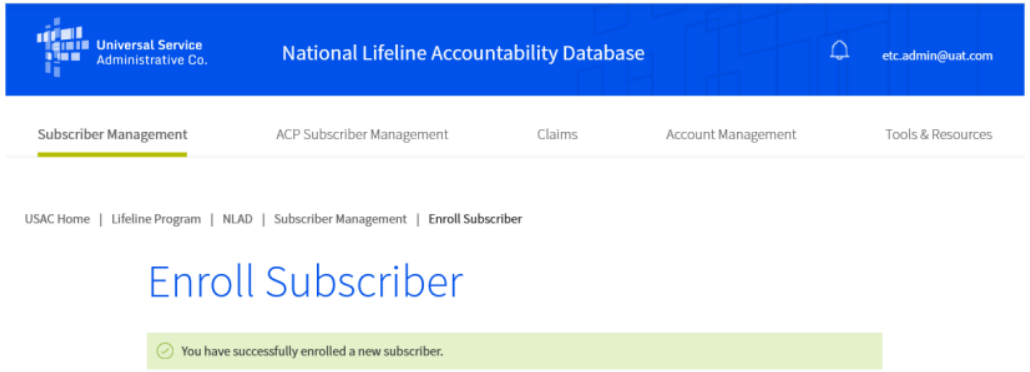
Enrollment Status

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

Unsuccessful Enrollment

- If an enrollment is not successful because of missing or incorrectly formatted data, the associated error messages will display at the top of the page in red
  - You will be redirected to the **Transaction Unsuccessful** page, where you will see the related error messages, as well as the transaction details



Questions?

Lifeline Subscriber Management – Batch Upload

Overview

Service providers can submit batch files to perform multiple transactions in NLAD

- Batch uploads can:
  - Contain one or many transactions
  - Include multiple SACs and transaction types

Lifeline Subscriber Management – Batch Upload

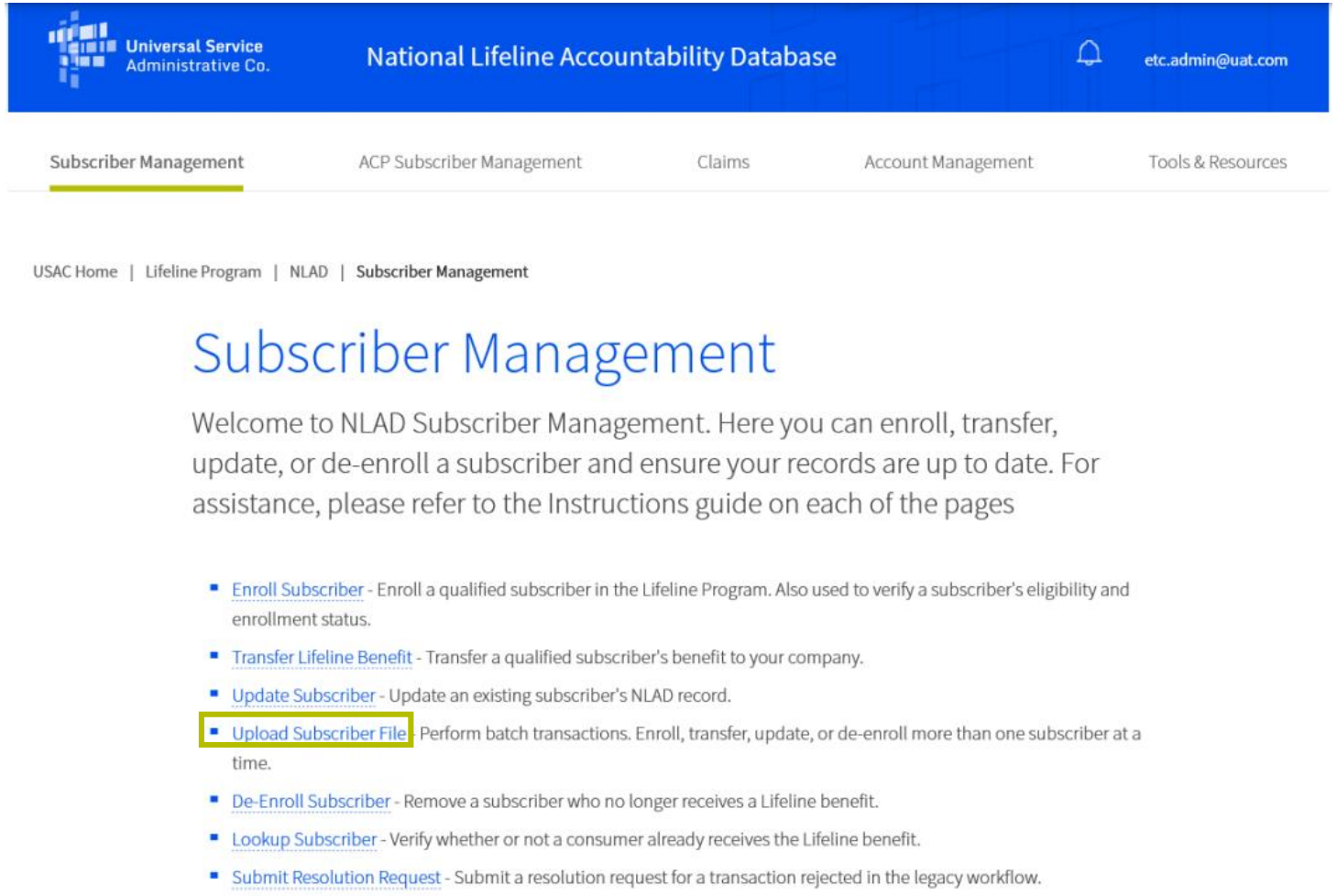
Prepare Batch Files

- Fill in the batch template with subscriber information
  - Provide all required fields for the transaction type
  - Do not change/modify any of the template headers (row 1)
  - For full descriptions of all input fields, including restrictions and requirement status, review the detailed field descriptions
- Save the file
  - File name must start with a six-digit SAC number and end with a .csv extension
  - For example, **999999-Company.csv**

Lifeline Subscriber Management – Batch Upload

Upload Subscriber File

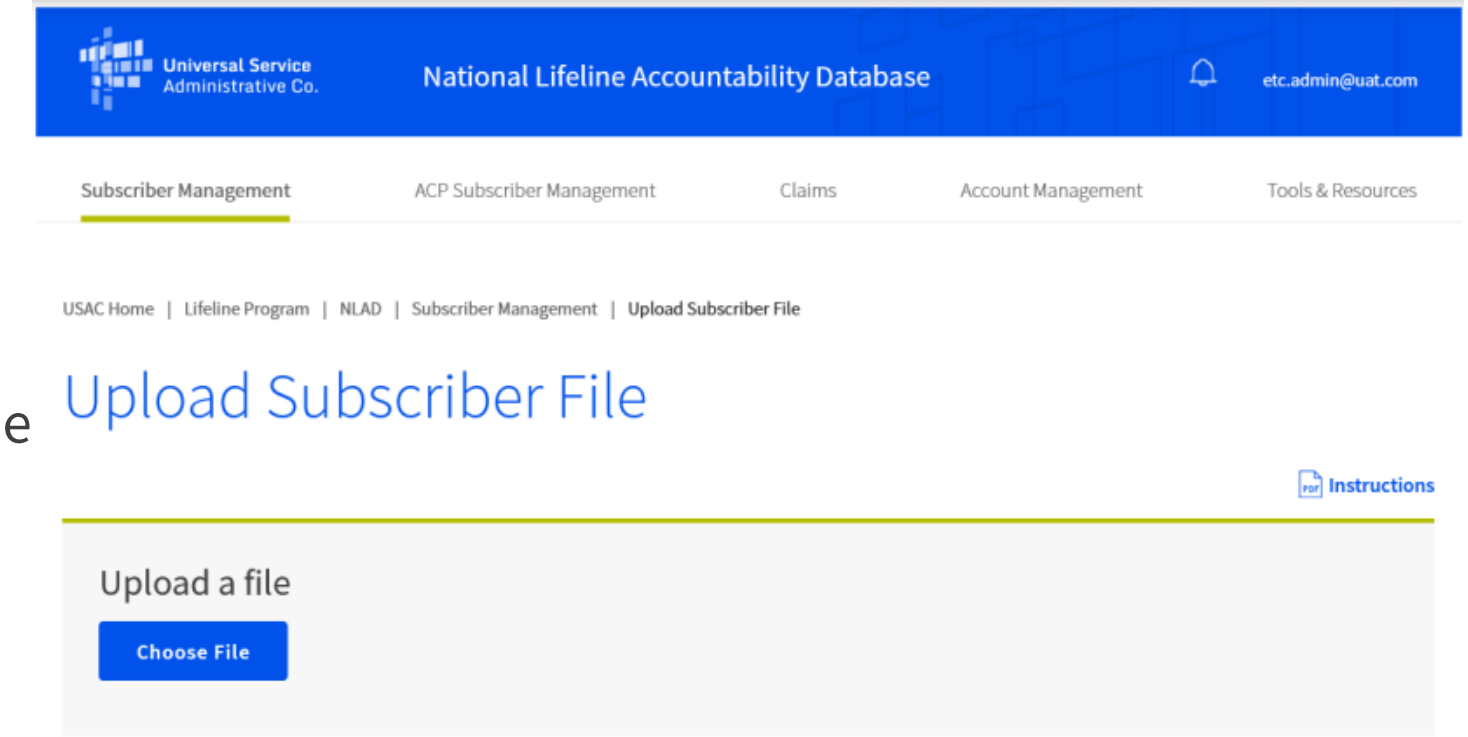
- From the **Upload Subscriber File** workflow, you may submit batch files for the Lifeline benefit



Lifeline Subscriber Management – Batch Upload

Upload Subscriber File

- Click "**Choose File**" button and select the file you want to upload, then
- Click "**Upload**" button to submit the file



Enrolling Subscribers Using Batch Upload

Retrieve Batch Status and Feedback

NLAD provides the status of batch files in the **Uploaded Files** table

- If the file uploads successfully, the status will be SUCCESS
- If the file does not upload successfully, NLAD will return an ERROR file
  - Download the ERROR file to understand which transactions were rejected and why
  - Correct errors and upload a new batch file
    - Tip: Do not include subscribers who were previously successfully uploaded

Displaying 1-7 of 7 records

SAC Filename	Username	Submitted Date	Rows Processed	Status	Submitted	Rejected	Errors
462178-noreptest....	lifelineanalyst@e...	04/22/2021 21:37 pm	1	ERRORS	1	1	
519905_empty_rows...	etc.admin@uat.com	01/08/2020 16:34 pm	2	SUCCESS	6	0	
431165_Dec15_Uplo...	etcadmintest@etc....	12/15/2021 11:37 am	3	ERRORS	3	2	
461835_COLORADO_1...	ccrossman@fairpoi...	03/12/2014 23:18 pm	3	SUCCESS	3	0	
100003_Verizon.cs...	etcadmintest@etc....	12/03/2021 14:48 pm	4	ERRORS	4	4	
500758A.csv	kristy@directcom....	02/21/2014 18:28 pm	18	SUCCESS	18	0	
579007_enroll.csv	tania.etc.admin@t...	03/09/2021 08:34 am	99999	SUCCESS	99999	20	

Show 25 records/page

1 of 1 pages

Questions?

Lifeline Subscriber Management – NLAD API

Overview

- The NLAD Application Programming Interface (API) allows for a computer-to-computer connection
- The NLAD API allows service providers to connect their billing or customer management system directly to NLAD so that their system can send enrollments or other transactions and pull reports automatically
  - For example, a service provider captures a consumer's enrollment in their own billing system, and the billing system sends the enrollment information to NLAD
- To use the NLAD API, service providers must have a signed Interconnection Security Agreement (ISA) with USAC

Lifeline Subscriber Management – NLAD API

API Access to NLAD

- Review the API Specifications
  - Information on how a service provider can integrate NLAD into their existing business models is available within the **NLAD API Specifications** document, which can be found in the **Tools & Resources** section in NLAD
- Complete Technical Development and Testing
  - Technical work is required to establish an API connection
  - The API Specifications will assist technical teams with development
- Submit a Signed Interconnection Security Agreement (ISA) to USAC
  - An ISA is an agreement established between USAC and service providers to document the technical requirements and security components of the interconnections between IT systems

Lifeline Subscriber Management – NLAD API

API Access to NLAD

Service providers accessing NLAD via the API must submit to USAC:

- API ID(s) they would like to register for API production access
  - If provider has not created an API ID yet, the ETC Administrator can create an API account in NLAD
- Completed and signed ISA
- The domain information for the service provider

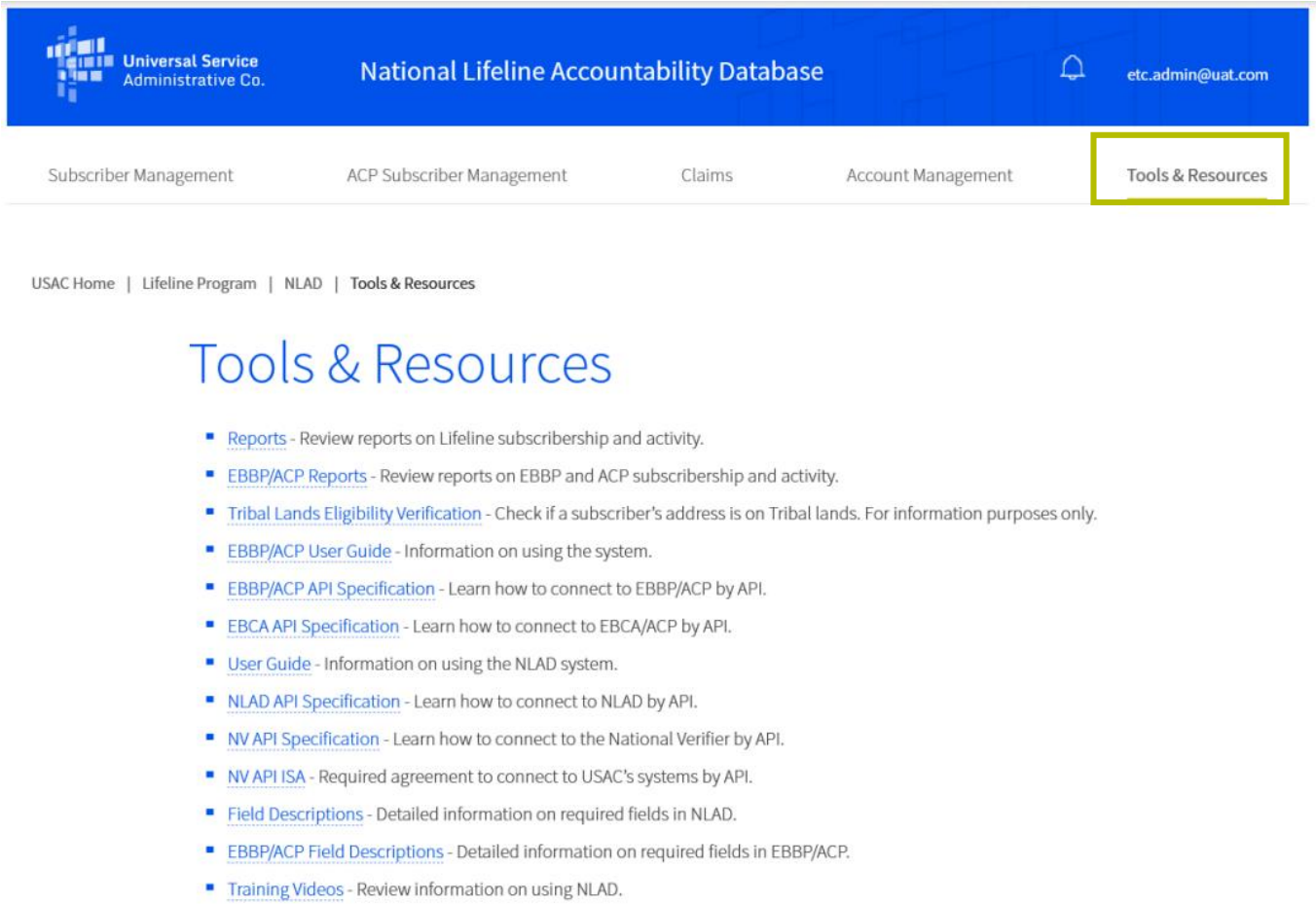
Questions?

Resources

Resources

Resources are available in the **Tools and Resources** section of NLAD:

- Reports
- User Guide
- API Specifications
- Field Descriptions



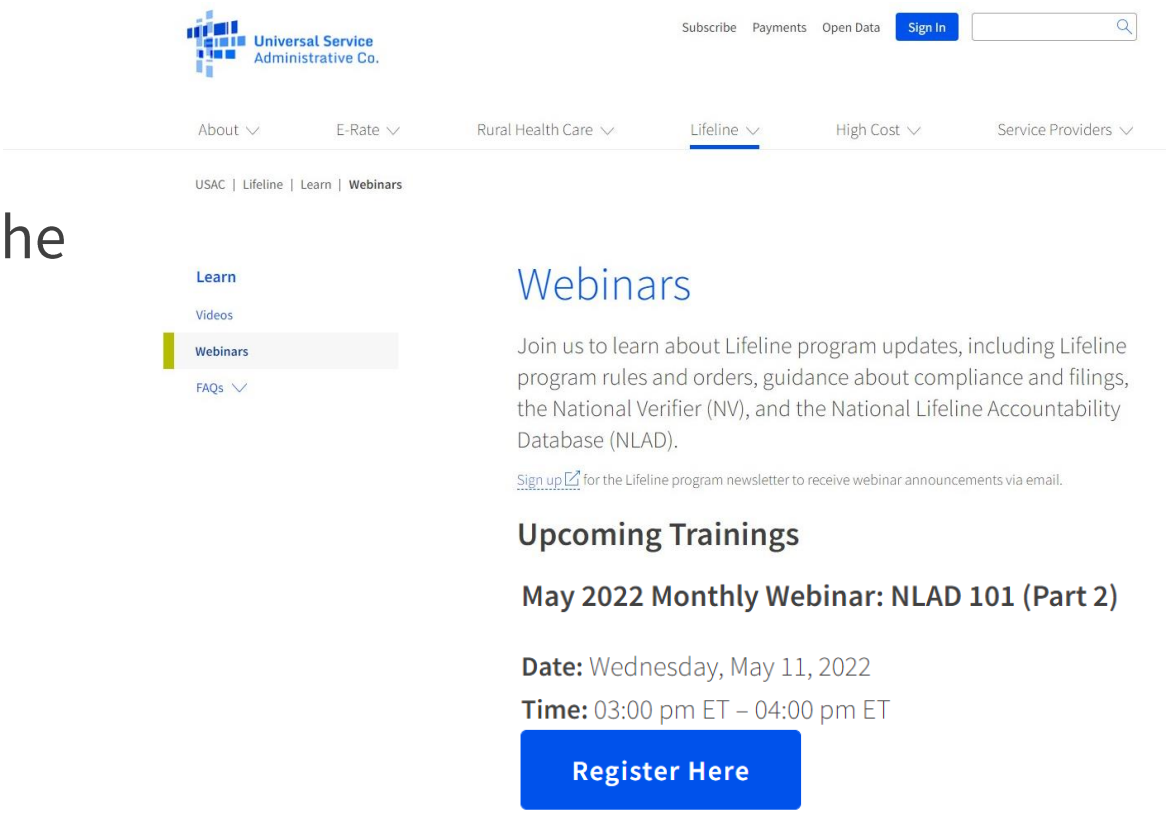
NLAD Resources

- More information can be found on the NLAD section of our website, including:
  - National Verifier NLAD Input Templates Field Names and Descriptions,
  - NLAD Maintenance Schedule and Release Notes
- Contact LifelineProgram@usac.org for technical questions and assistance and general NLAD inquiries
- Subscribe to receive the NLAD Bulletin

Next Month's Training Topic

NLAD 101 Part 2

- Join us for a continuation of the review of the National Lifeline Accountability Database (NLAD).
- The training is ideal for service providers.



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- Sign up for Lifeline email updates and upcoming events
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- Need help? Contact us!
  - General inquiries: LifelineProgram@usac.org

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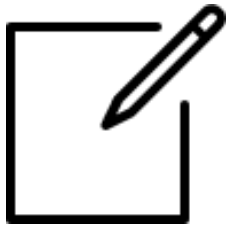

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