May 2022 Monthly Webinar
NLAD 101: Part Two

May 11, 2022
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 the webinar panel
Meet Our Team

Delanté Cherry
Communications Specialist | Lifeline

Delanté develops internal and external communications
Objectives

At the end of the session, you will...

...be able to:
- Transfer, update, and de-enroll subscribers from the NLAD
- View reports
- Access resources in NLAD

...understand:
- The basic subscriber management functions in the NLAD system
Agenda

- Announcements
- National Lifeline Accountability Database (NLAD) Overview
  - Transfer Subscriber
  - Update Subscriber
  - De-enroll Subscriber
  - View Reports
- 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
National Lifeline Accountability Database (NLAD) Overview
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)
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
Transfer Subscriber
National Lifeline Accountability Database (NLAD)

Sign In

- Access NLAD through One Portal
National Lifeline Accountability Database (NLAD)

Subscriber Management

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

- Select **Subscriber Management** to see the types of transactions your user role can perform

![Subscriber Management Image](image-url)
National Lifeline Accountability Database (NLAD)

Transfer Subscriber

- From the **Transfer Lifeline Benefit** workflow, you can transfer a qualified subscriber’s benefit to your company.
Transfer Subscriber
Subscriber Information

There are two options to transfer a subscriber’s Lifeline benefit in NLAD

- 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)
Transfer Subscriber
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)
Transfer Subscriber
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
**Transfer Subscriber**

Review Subscriber Information

- Review the subscriber information and click **Transfer** to complete the transaction.
Transfer Subscriber
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

• NLAD will generate two automated email messages:
  • A message to the designated contact of the ETC losing the subscriber
  • A message to the designated contact of the ETC receiving the subscriber
Transfer Subscriber
Unsuccessful Transfer

• If a transfer 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
Update Subscriber
National Lifeline Accountability Database (NLAD)

Update Subscriber

- From the **Update Subscriber** workflow, you can search for a subscriber using their phone number or Subscriber ID, edit available data, and submit changes to the subscriber’s record.
Update Subscriber
Enter Subscriber Information

• **Select Type:** Search by Subscriber ID or Phone Number
  • If Phone Number is selected, enter in the subscriber’s Phone Number
  • If Subscriber ID is selected, enter in the subscriber ID

• **Update Type:** Select **Production** to search for an active subscriber
Update Subscriber
Subscriber Not Found

• If a match is not found, you will receive a **Subscriber Not Found** error message
If a matching subscriber is found, the subscriber's personal information will be displayed for your review.

Fields that are editable include:

- Middle Name
- Address
- Service Type
- Phone Number
- Lifeline Tribal Benefit (if applicable)
- Linkup Service Date (if applicable)
- ETC General Use
Update Subscriber

- Click **Update** to submit the modified information to NLAD
- Upon a successful update, you will receive confirmation that you have successfully updated the subscriber record
Questions?
De-Enroll Subscriber
National Lifeline Accountability Database (NLAD)

De-Enroll Subscriber

- From the **De-Enroll Subscriber** workflow, you can de-enroll a subscriber who is no longer eligible to receive Lifeline from NLAD.
De-Enroll Subscriber
Enter Subscriber Information

- **Select Type:** Search by Subscriber ID or Phone Number
  - If Phone Number is selected, enter in the subscriber’s Phone Number
  - If Subscriber ID is selected, enter in the subscriber ID

- **De-Enroll Type:** Select **Production** to search for an active subscriber
De-Enroll Subscriber
Verify Subscriber Information

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

• **Verify** the subscriber's record returned is the correct subscriber
**De-Enroll Subscriber**

Verify Subscriber Information

- Select the de-enrollment reason
  - Subscriber is deceased
  - Subscriber is leaving the program
  - Subscriber failed to recertify
  - Subscriber non-usage

- Select the effective date
  - Date that the de-enrollment of the subscriber occurs with the service provider and marks the last day of the subscriber's enrollment in the Lifeline program

- Click **De-Enroll**
De-Enroll Subscriber
Verify Subscriber Information

• Upon successful de-enrollment, you will receive confirmation that the subscriber was de-enrolled
View Reports
Reports

- From the **Tools and Resources** section select **Reports** to view information on Lifeline subscribers and activity.
Reports

- From the **Reports** workflow, select the type of report you’d like to review
  - **Summary Reports**: Provide counts of records that fall within the specified parameters
  - **Detail Reports**: Return the full records along with other relevant reporting fields
- Report data is limited to the SACs associated with a user’s account
Reports

- Select a report to generate from the Report Type field
- Select criteria for all required filters
  - **Report Type**: allows you to select a specific report available in NLAD
  - **SAC**: Optional field that allows you to filter by one or many SACs
  - **SPIN**: Optional field that allows you to filter by one or more SPINs
  - **Start Date**: Date you would like the report to begin
  - **End Date**: Date you would like the report to end
- Click Submit
**Reports**

**Summary and Detail Subscriber Snapshot Report**

- Shows the monthly snapshot of active subscribers (taken on the 1\textsuperscript{st} of the month)
  - Summary report shows the total non-Tribal and Tribal subscribers by SAC for selected data month
  - Detailed report shows the listing of all active subscribers’ records by SAC for the selected data month
Reports

Summary Subscriber Report

- Shows the total number of subscribers on every day within a specified range of dates for the selected SACs

### Summary Subscriber Report

<table>
<thead>
<tr>
<th>Date</th>
<th>Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/27/2022</td>
<td>40</td>
</tr>
<tr>
<td>04/28/2022</td>
<td>40</td>
</tr>
<tr>
<td>04/29/2022</td>
<td>40</td>
</tr>
<tr>
<td>04/30/2022</td>
<td>40</td>
</tr>
</tbody>
</table>

*The Summary Report data may not match the Detail Reports Data, as the summary is only current as of midnight of the previous day.*
Available for Public Use

**Reports**

**Detail Active Subscriber Report**

- Shows all active subscriber records for a specified SAC at the time the report is run

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**Active Subscriber Report**

The table below provides a summary of the data in this report. To view details for a specific subscriber, click on their Subscriber ID in the table below. To view the entire report, select Export to CSV.

Displaying 1-25 of 40 records

<table>
<thead>
<tr>
<th>Study Area Code</th>
<th>Enrollment Date</th>
<th>Last Transaction Type</th>
<th>Last Name</th>
<th>First Name</th>
<th>Subscriber ID</th>
<th>Telephone Number</th>
<th>Service Type</th>
<th>Lifeline Tribal Benefit Flag</th>
<th>Anniversary Date</th>
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</thead>
<tbody>
<tr>
<td>BUNDLEVOICEBROAD...</td>
<td>0</td>
<td>Sep 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BUNDLEVOICEBROAD...</td>
<td>0</td>
<td>Sep 24</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BUNDLEVOICEBROAD...</td>
<td>0</td>
<td>Oct 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>BUNDLEVOICEBROAD...</td>
<td>0</td>
<td>Sep 24</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>VOICE</td>
<td>0</td>
<td>Sep 20</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>VOICE</td>
<td>0</td>
<td>Oct 2</td>
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<tr>
<td>VOICE</td>
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<td>Nov 21</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Reports

Summary Transaction Report

- Shows the total number of transactions by type each day within a specified range of dates for the selected SACs
Reports
Detail Transaction Report

- Details all transactions of a selected type by SAC and the specified date range
  - Available transaction types include: Enroll, De-Enroll, Update, and Benefit Transfer
**Reports**

Recertification Subscriber Status Report

- Shows status of subscribers undergoing the recertification process by SAC

![Recertification Subscriber Status Report](image)
Reports
Failed Recertification De-Enroll Report

- Shows all subscribers de-enrolled for a failure to complete recertification
# Reports

## Reverification Subscriber Status Report

- Shows the status of all subscribers undergoing the reverification process by SAC

<table>
<thead>
<tr>
<th>Reverification Group</th>
<th>Application ID</th>
<th>Study Area Code</th>
<th>ETC General Use</th>
<th>Last Name</th>
<th>First Name</th>
<th>Subscriber ID</th>
<th>Last Updated Date</th>
<th>Reverification Check Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>V59308-95630</td>
<td>100002</td>
<td></td>
<td>Dyer</td>
<td>sr</td>
<td>luae650ef</td>
<td>09/24/2019</td>
<td>Pass</td>
</tr>
<tr>
<td>2</td>
<td>V55327-58989</td>
<td>100002</td>
<td></td>
<td>Harrington</td>
<td>Mark</td>
<td>go3a4wp9u</td>
<td>09/27/2019</td>
<td>Pass</td>
</tr>
<tr>
<td>2</td>
<td>V62652-45443</td>
<td>100002</td>
<td></td>
<td>Bennett</td>
<td>David</td>
<td>gri5g4j3</td>
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<td>Pass</td>
</tr>
<tr>
<td>3</td>
<td>V60530-54549</td>
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<td></td>
<td>Taylor</td>
<td>angela</td>
<td>lnsai5732</td>
<td>09/29/2019</td>
<td>Pass</td>
</tr>
<tr>
<td>2</td>
<td>V60082-63375</td>
<td>100002</td>
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<td>Donney</td>
<td>Alleene</td>
<td>m9065sta1</td>
<td>09/30/2019</td>
<td>Pass</td>
</tr>
</tbody>
</table>
Reports
Failed Reverification De-Enroll Report

• Shows subscribers de-enrolled for a failure to complete reverification
Reports
Linked Representatives Report – ETC Admin

• Shows ETC Administrators that are linked to a particular SPIN
• This report is only available to 497 Officers
Reports
Linked Representatives Report – Subaccounts

• Shows NLAD subaccount users that are linked to a particular SPIN
• This report is only available to ETC Administrators
Reports

Continued Eligibility Status Report

- Shows the status of all subscribers undergoing the continued eligibility process

Continued Eligibility Status Report

The table below provides a summary of the data in this report. To view details for a specific subscriber, click on their Subscriber ID in the table below. To view the entire report, select Export to CSV.

<table>
<thead>
<tr>
<th>Continued Eligibility Status</th>
<th>Application ID</th>
<th>SAC</th>
<th>Subscriber ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>ETC General</th>
<th>Continued Eligibility Check Date</th>
<th>Continued Eligibility Deadline Date</th>
<th>Failed Continued Eligibility Deenroll Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11/12/2021</td>
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<td></td>
</tr>
<tr>
<td>In Progress</td>
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<td></td>
<td></td>
<td></td>
<td>11/24/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Progress</td>
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<td>03/22/2022</td>
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<tr>
<td>Confirmed Eligibility...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11/09/2021</td>
<td>12/10/2021</td>
<td></td>
</tr>
</tbody>
</table>
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][1] of our website, including:
  • [National Verifier NLAD Input Templates Field Names and Descriptions][2],
  • [NLAD Maintenance Schedule][3] and Release Notes

• Contact [LifelineProgram@usac.org][4] for technical questions and assistance and general NLAD inquiries

• Subscribe to receive the [NLAD Bulletin][5]

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[1]: #
[2]: #
[3]: #
[4]: #
[5]: #
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• We appreciate your feedback
Thank You!