May 2022 Monthly Webinar
NLAD 101: Part Two

May 11, 2022

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 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

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)

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

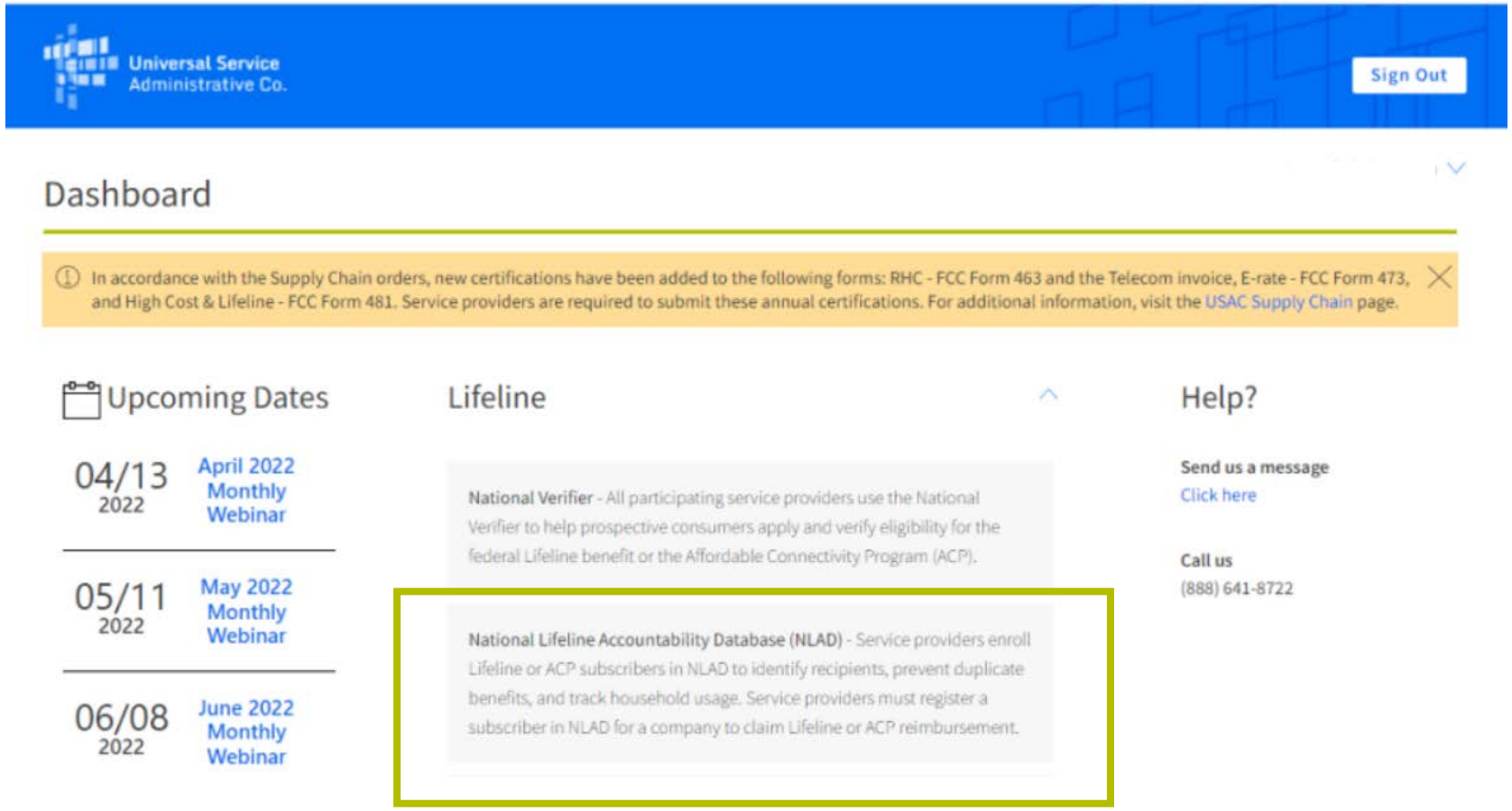
Reminder: To perform applicable NLAD transactions, NLAD users are required to register for a Rep ID and have that Rep ID linked to their account. For more information, visit the RAD Resources page

Transfer Subscriber

National Lifeline Accountability Database (NLAD)

Sign In

- Access NLAD through [One Portal]

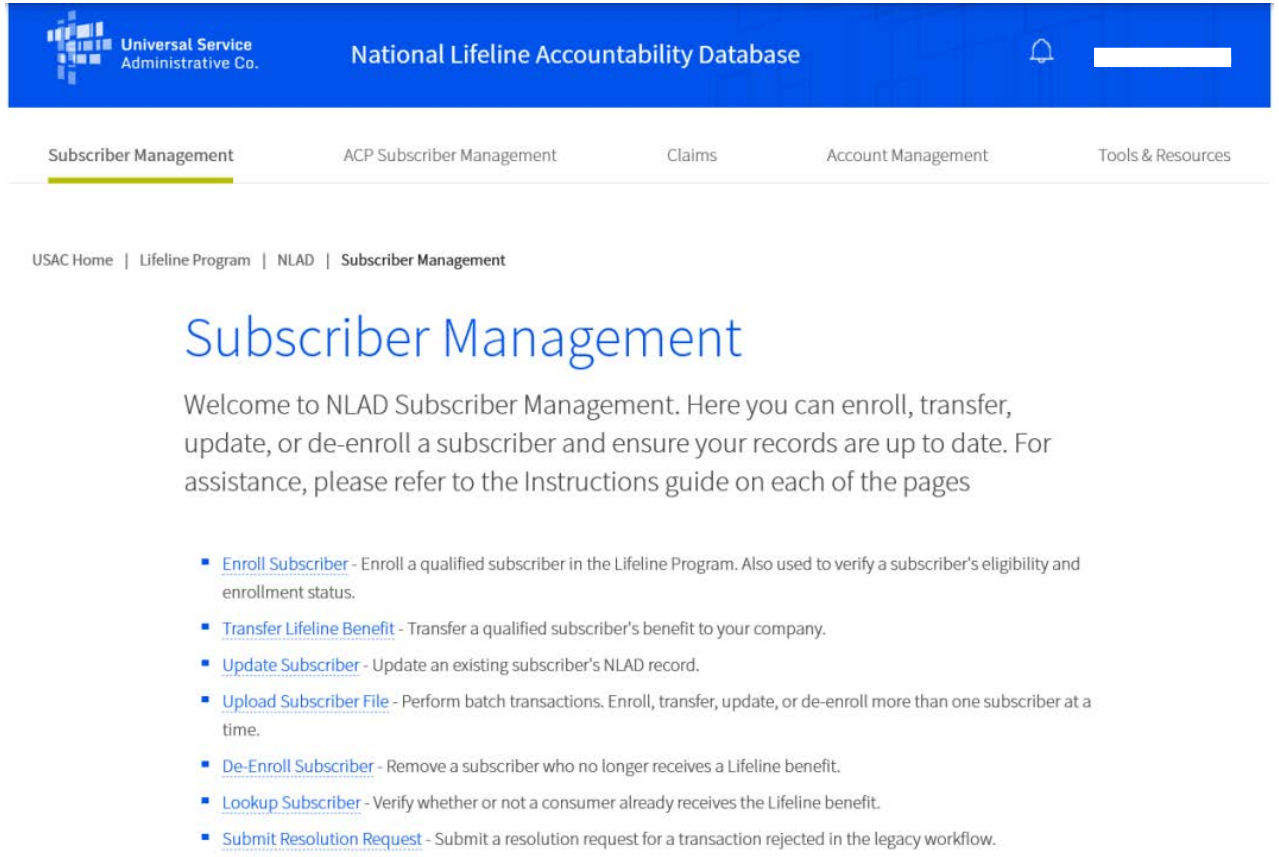


National Lifeline Accountability Database (NLAD)

Subscriber Management

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

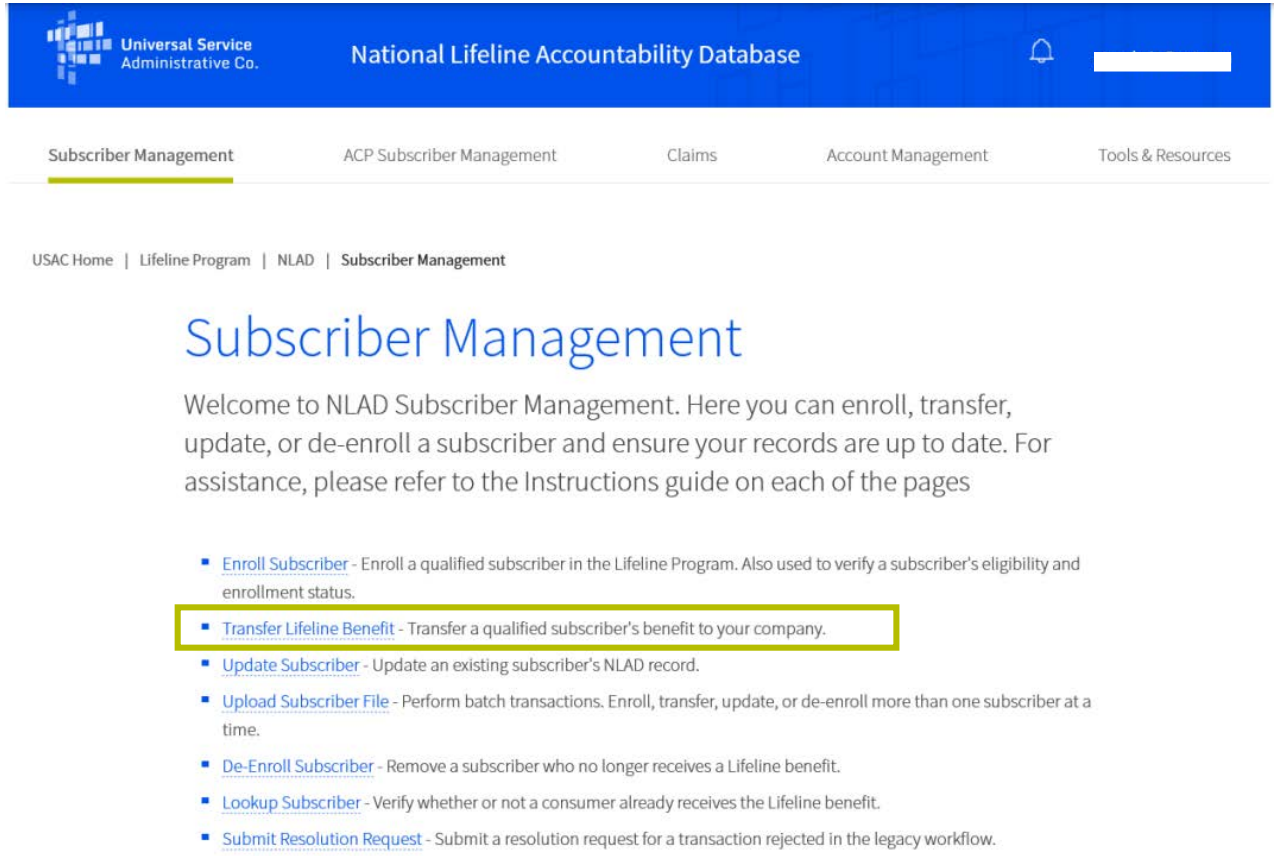
- Select **Subscriber Management** to see the types of transactions your user role can perform



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

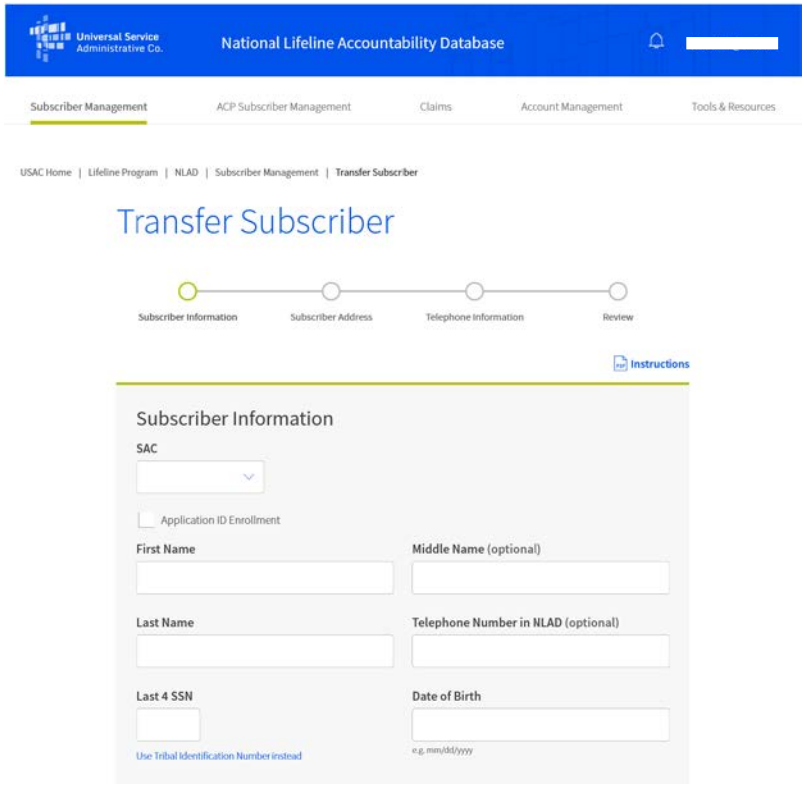
Subscriber Information

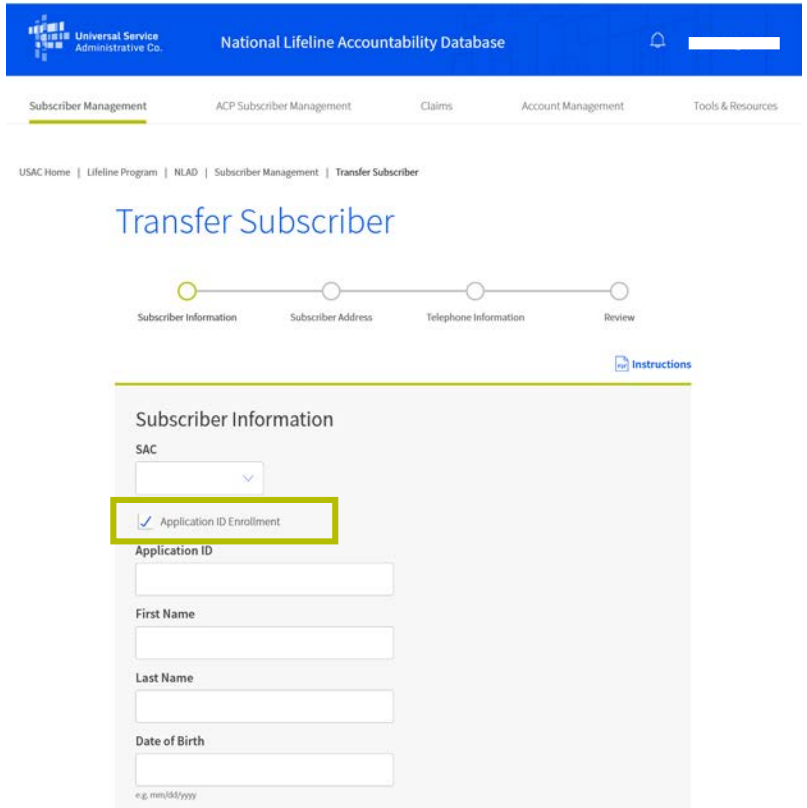
There are two options to transfer a subscriber's Lifeline benefit in NLAD

- 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)

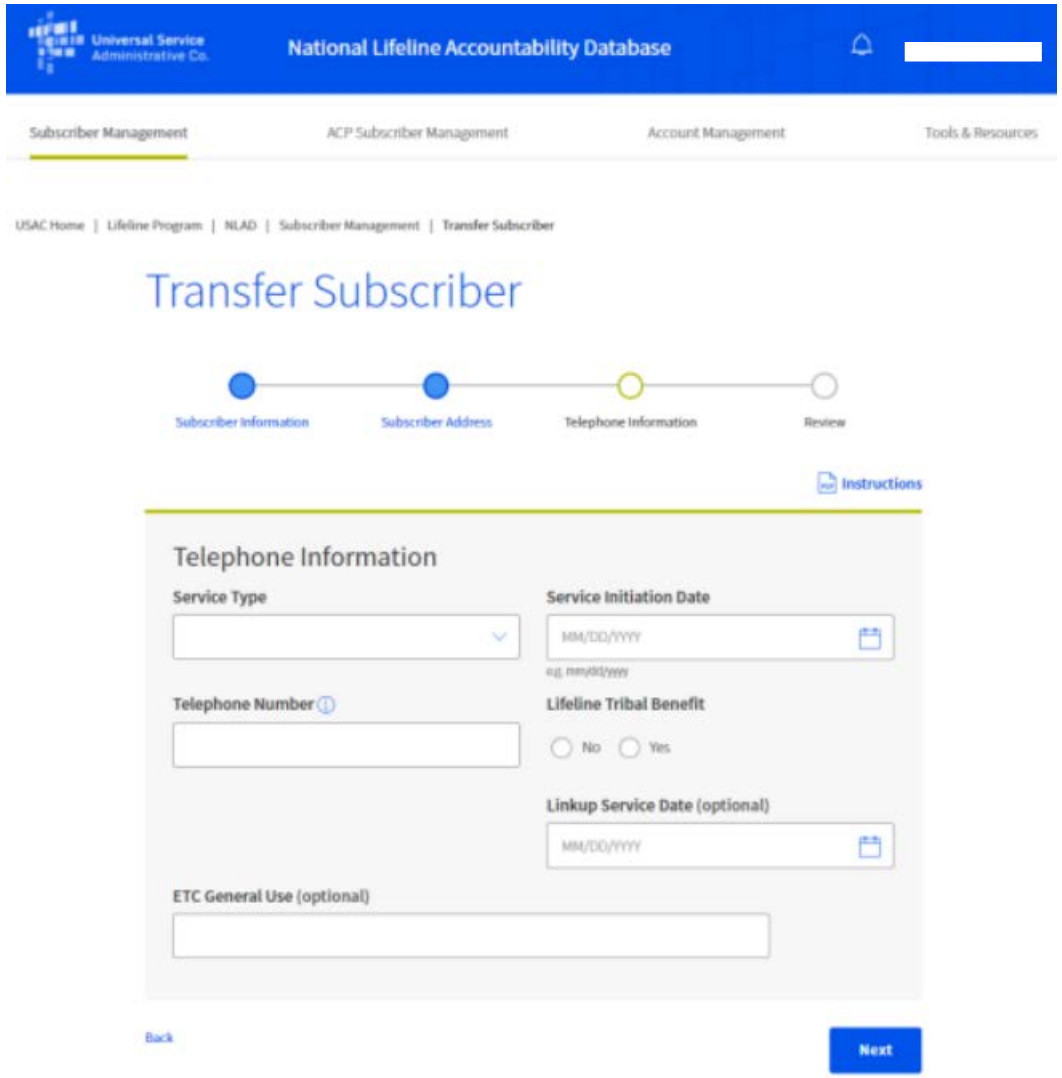




Transfer Subscriber

Service Information (1 of 2)

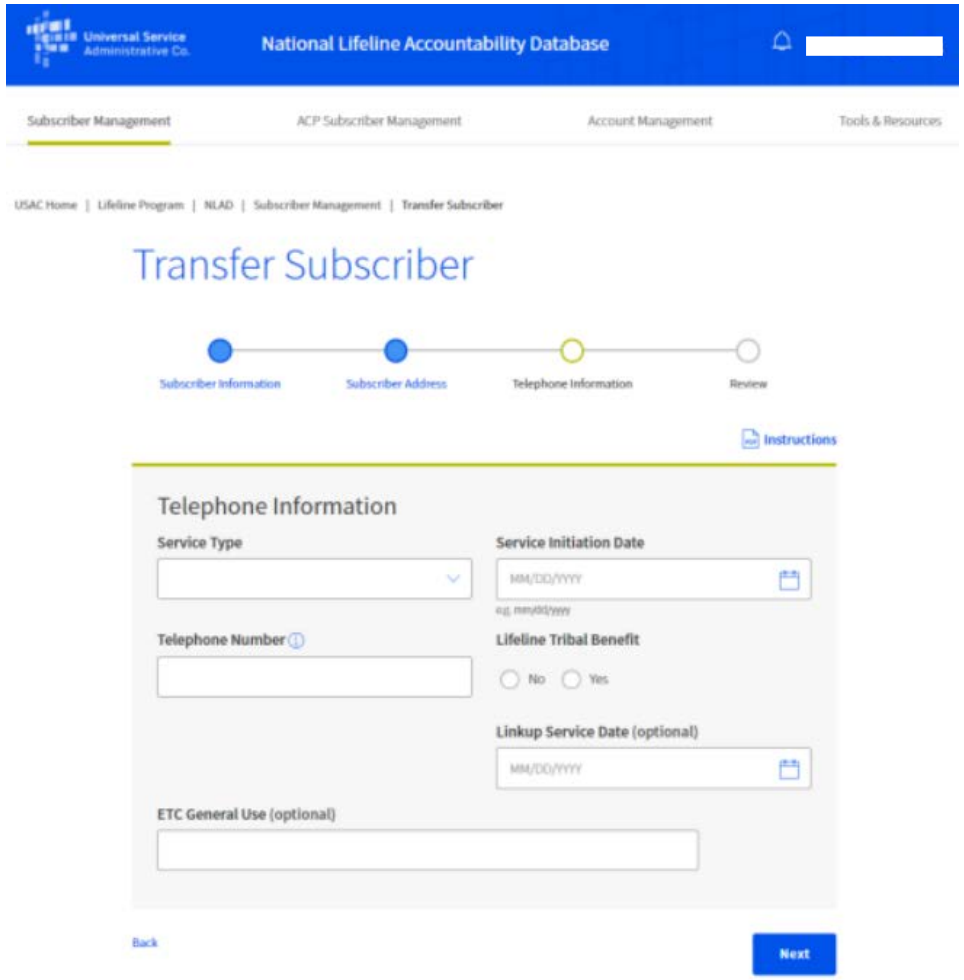
- Enter in the consumer's service information:
  - **Service Type:** Subscriber's Lifeline service offering: Voice, broadband, bundled-voice, bundled-broadband, bundled-voice, and broadband
  - **Service Initiation Date:** Date the service provider initiated Lifeline service
  - **Telephone Number:**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



Transfer Subscriber

Service Information (2 of 2)

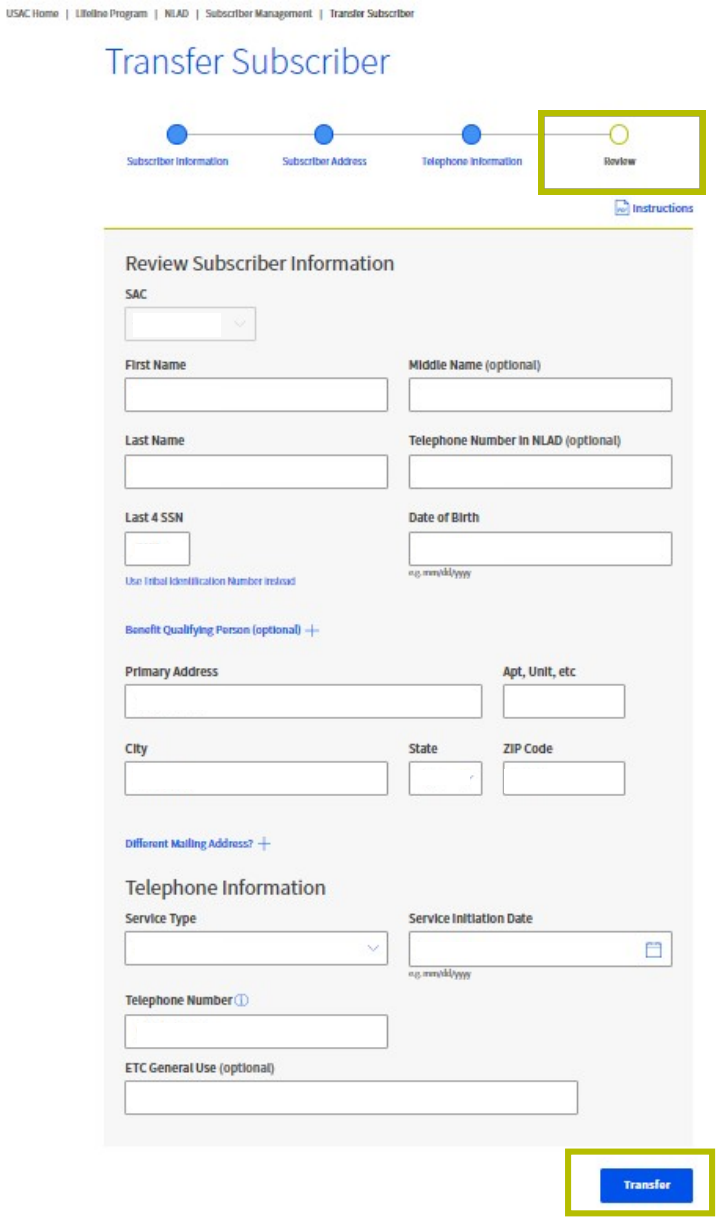
- **Lifeline Tribal Benefit**: Required field to claim Lifeline Tribal support for a qualified subscriber, this field will not appear if the subscriber's address falls on non-Tribal lands
- **Linkup Service Date**: Date of Linkup Service (mm/dd/yyyy format)
- **ETC General:** Optional field that some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



Transfer Subscriber

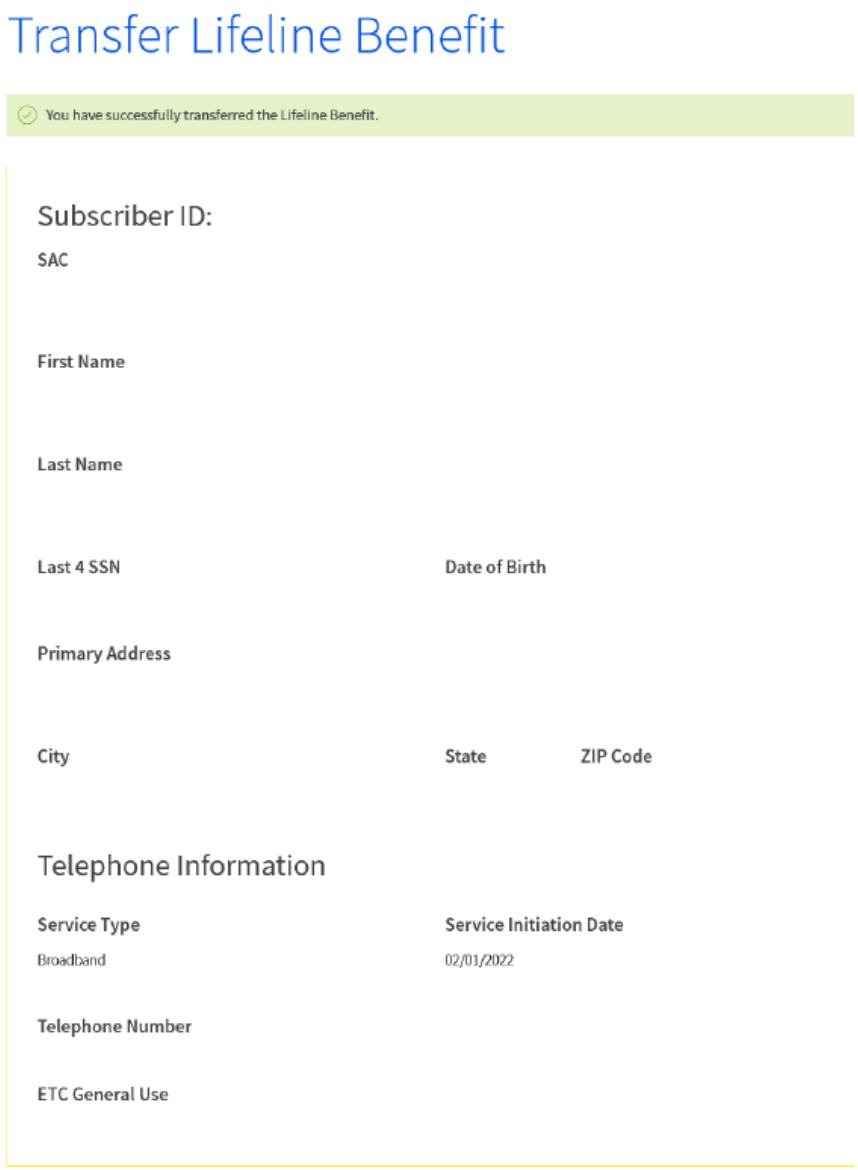
Review Subscriber Information

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



Transfer Subscriber
Successful Transfer

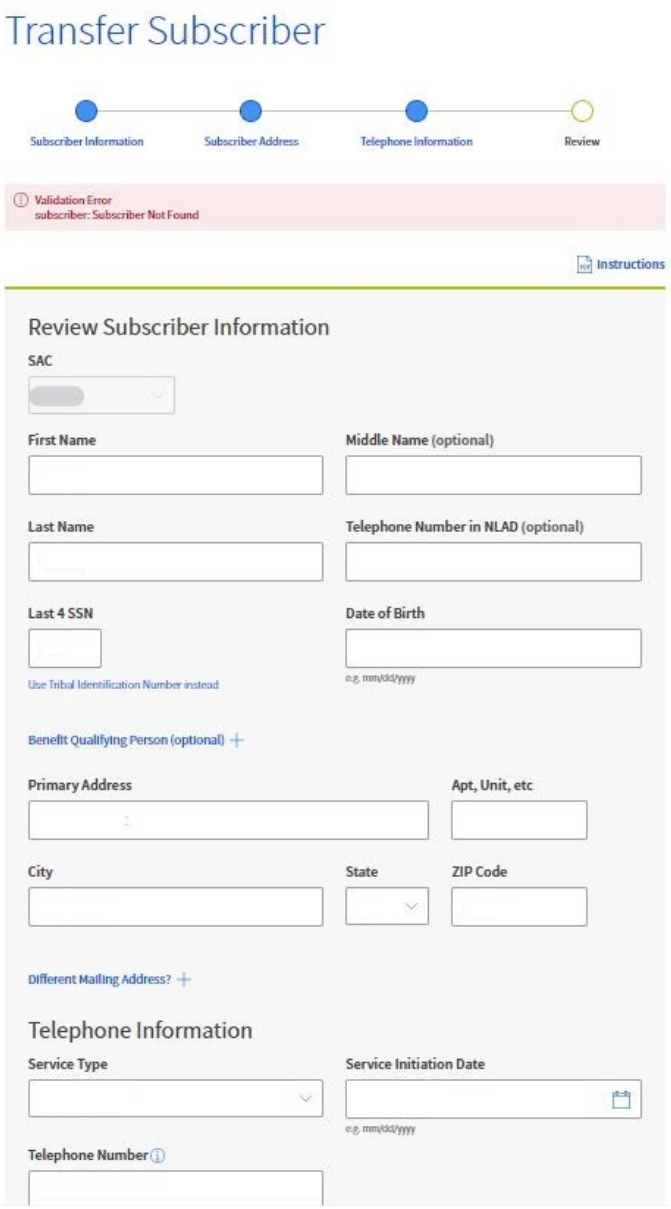
- Upon successful transfer, you will be taken to the **Transaction Successful** page, where you will see a success message, followed by a read-only display of the transfer details
- NLAD will generate two automated email messages:
  - A message to the designated contact of the ETC losing the subscriber
  - 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

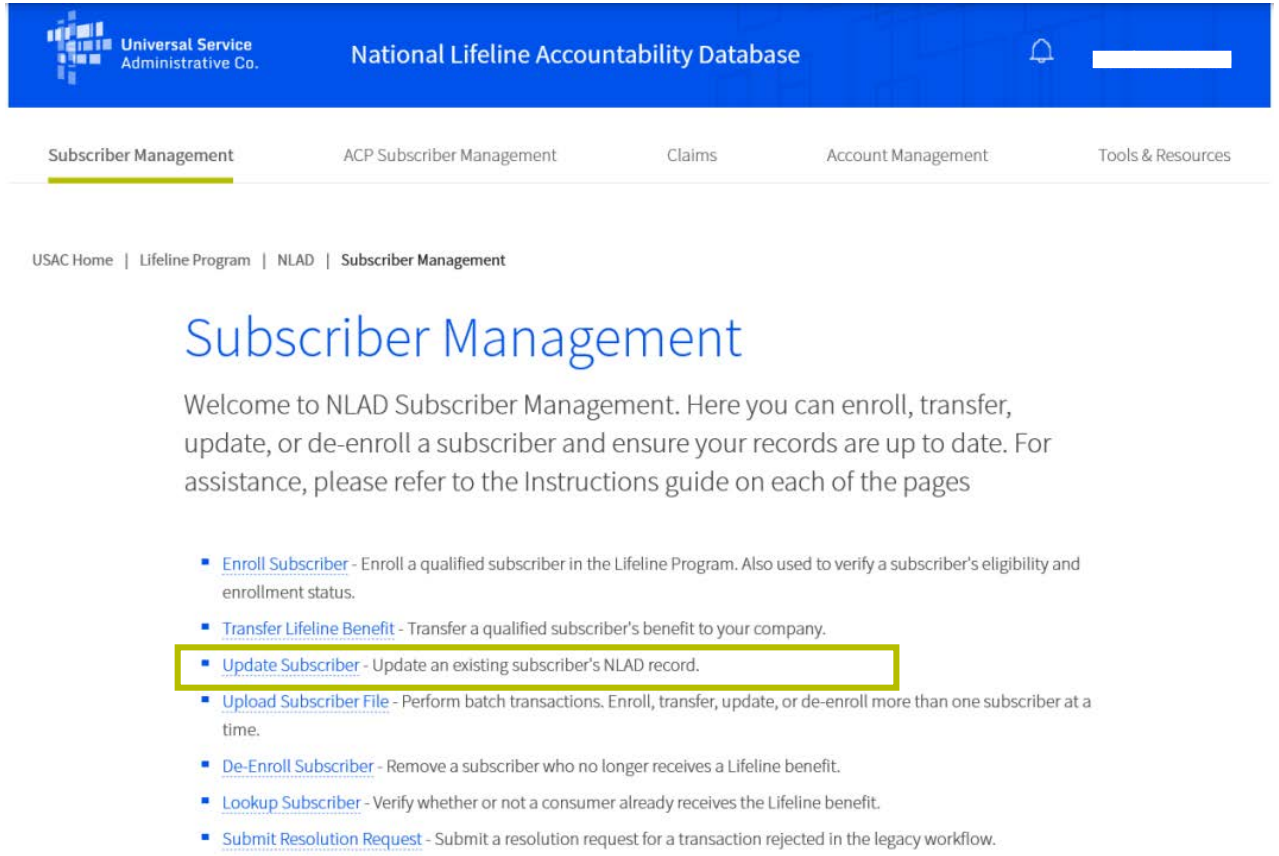


Update Subscriber

National Lifeline Accountability Database (NLAD)

Update Subscriber

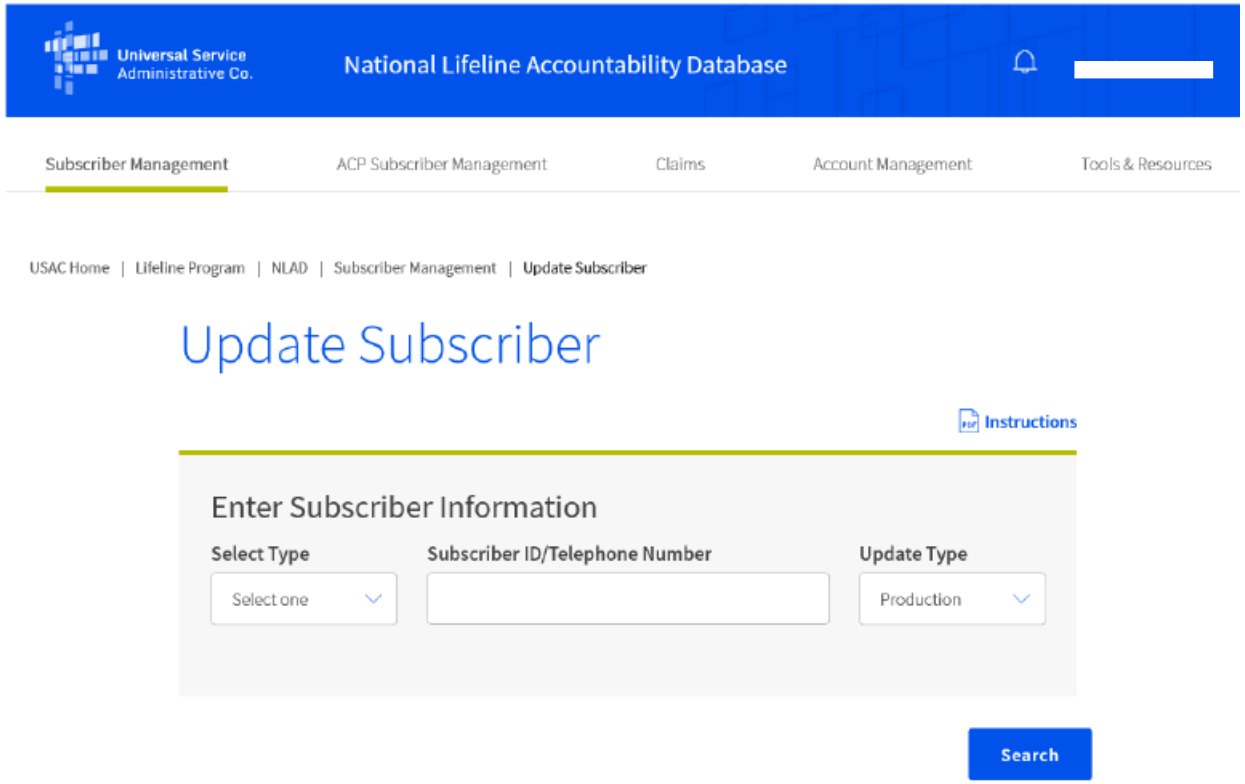
- From the **Update Subscriber** workflow, you can search for a subscriber using their phone number or Subscriber ID, edit available data, and submit changes to the subscriber's record



Update Subscriber

Enter Subscriber Information

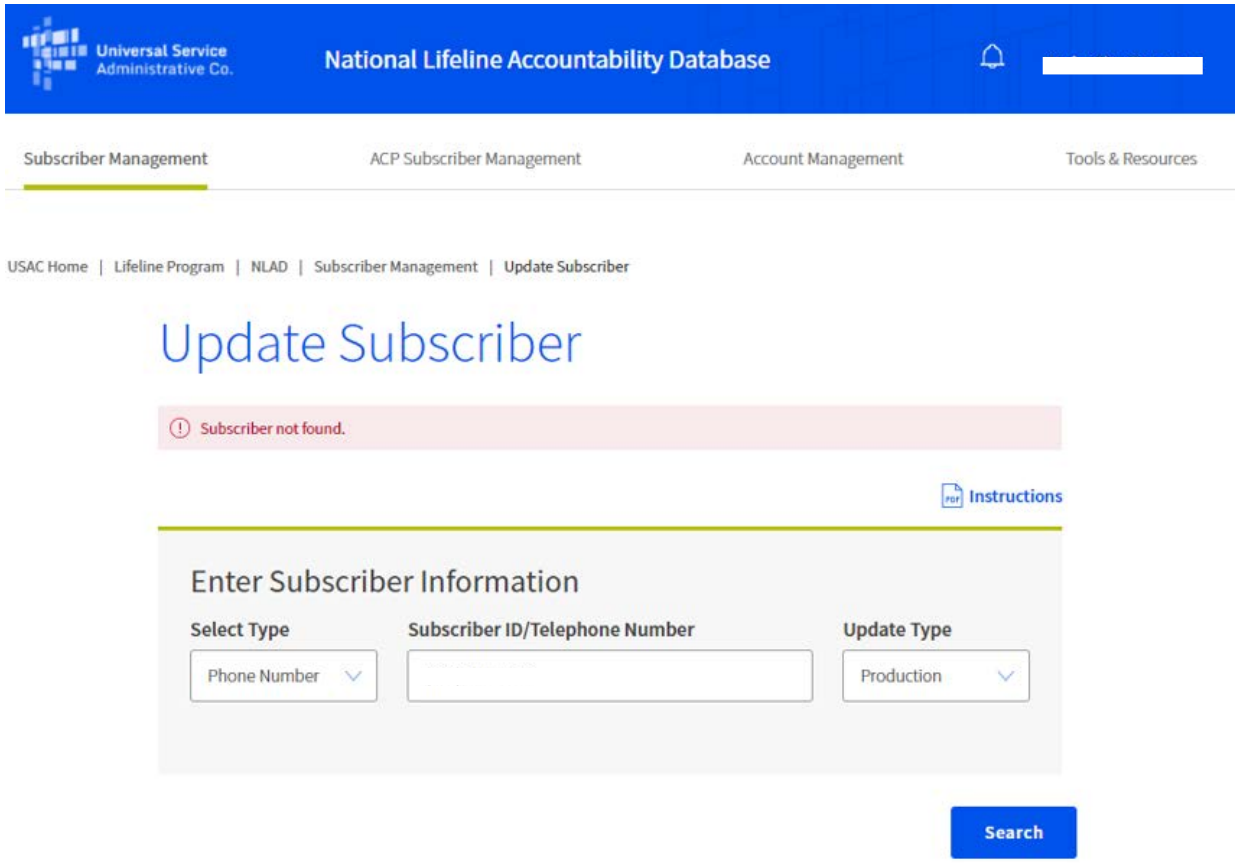
- **Select Type:** Search by Subscriber ID or Phone Number
  - If Phone Number is selected, enter in the subscriber's Phone Number
  - If Subscriber ID is selected, enter in the subscriber ID
- **Update Type:** Select **Production** to search for an active subscriber



Update Subscriber

Subscriber Not Found

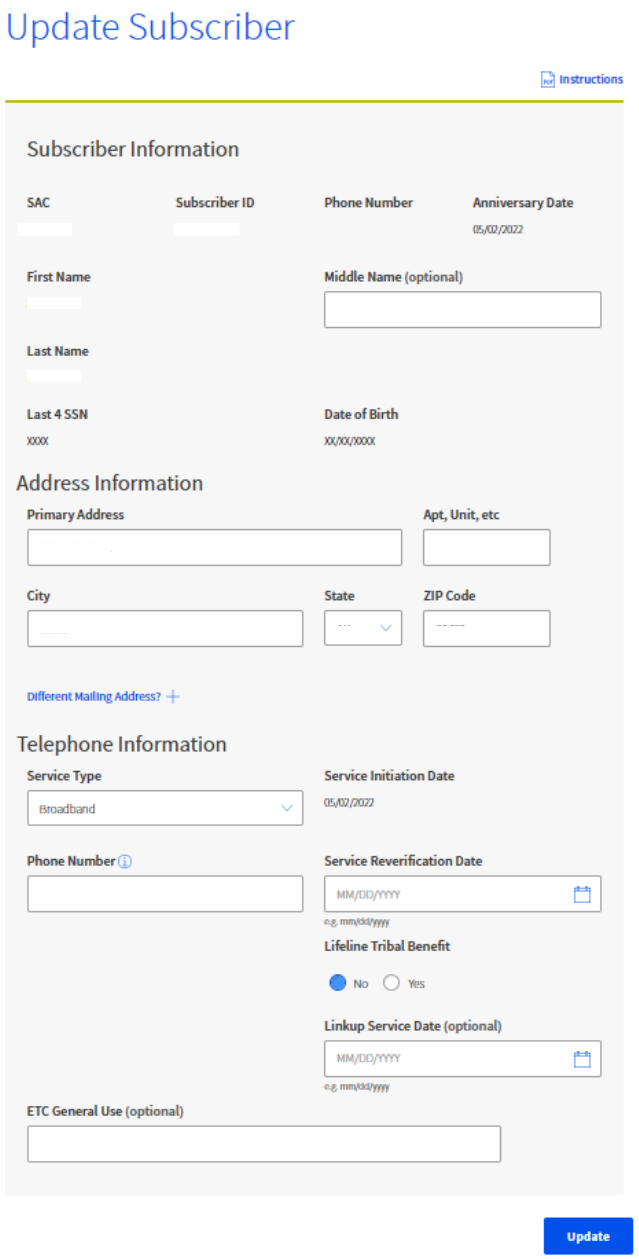
- If a match is not found, you will receive a **Subscriber Not Found** error message



Update Subscriber

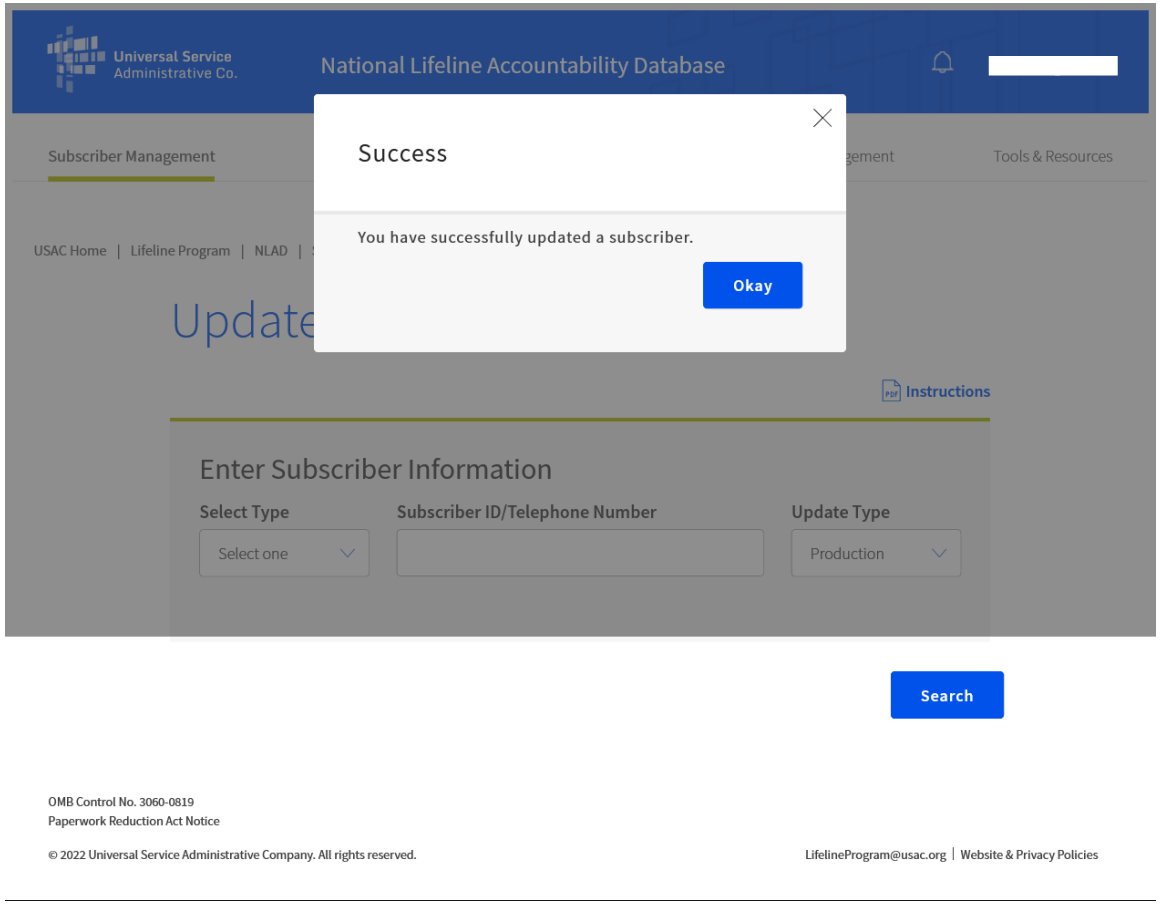
Edit Subscriber Record

- 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



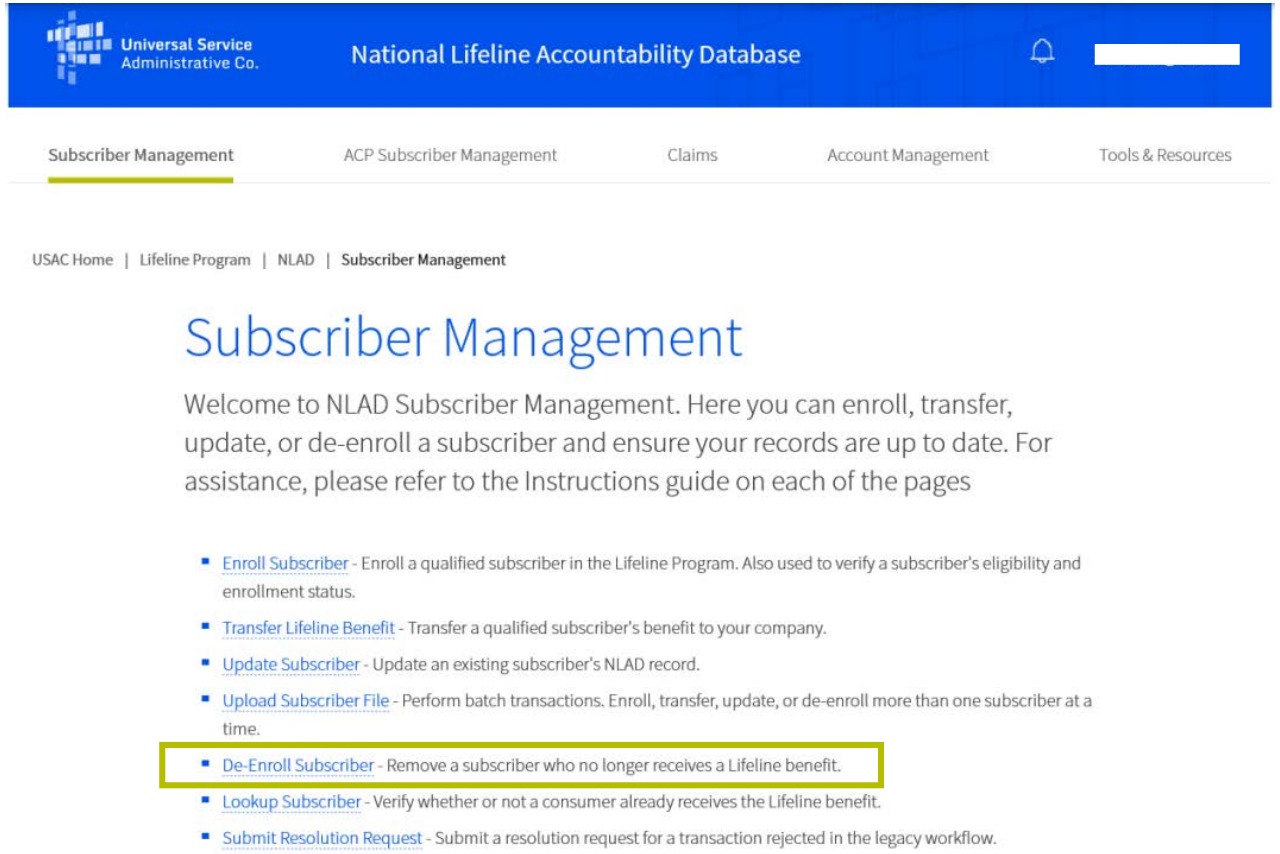
Questions?

De-Enroll Subscriber

National Lifeline Accountability Database (NLAD)

De-Enroll Subscriber

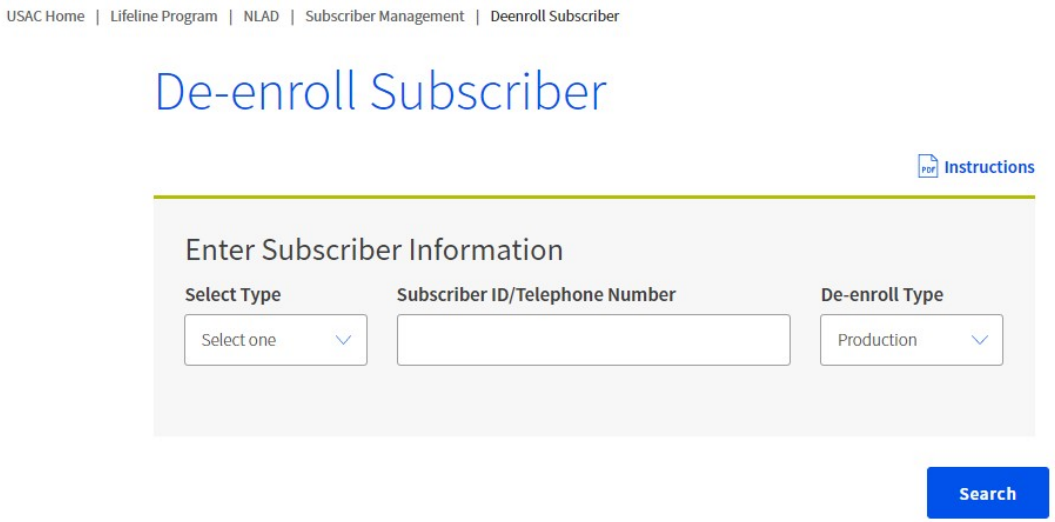
- From the **De-Enroll Subscriber** workflow, you can de-enroll a subscriber who is no longer eligible to receive Lifeline from NLAD



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

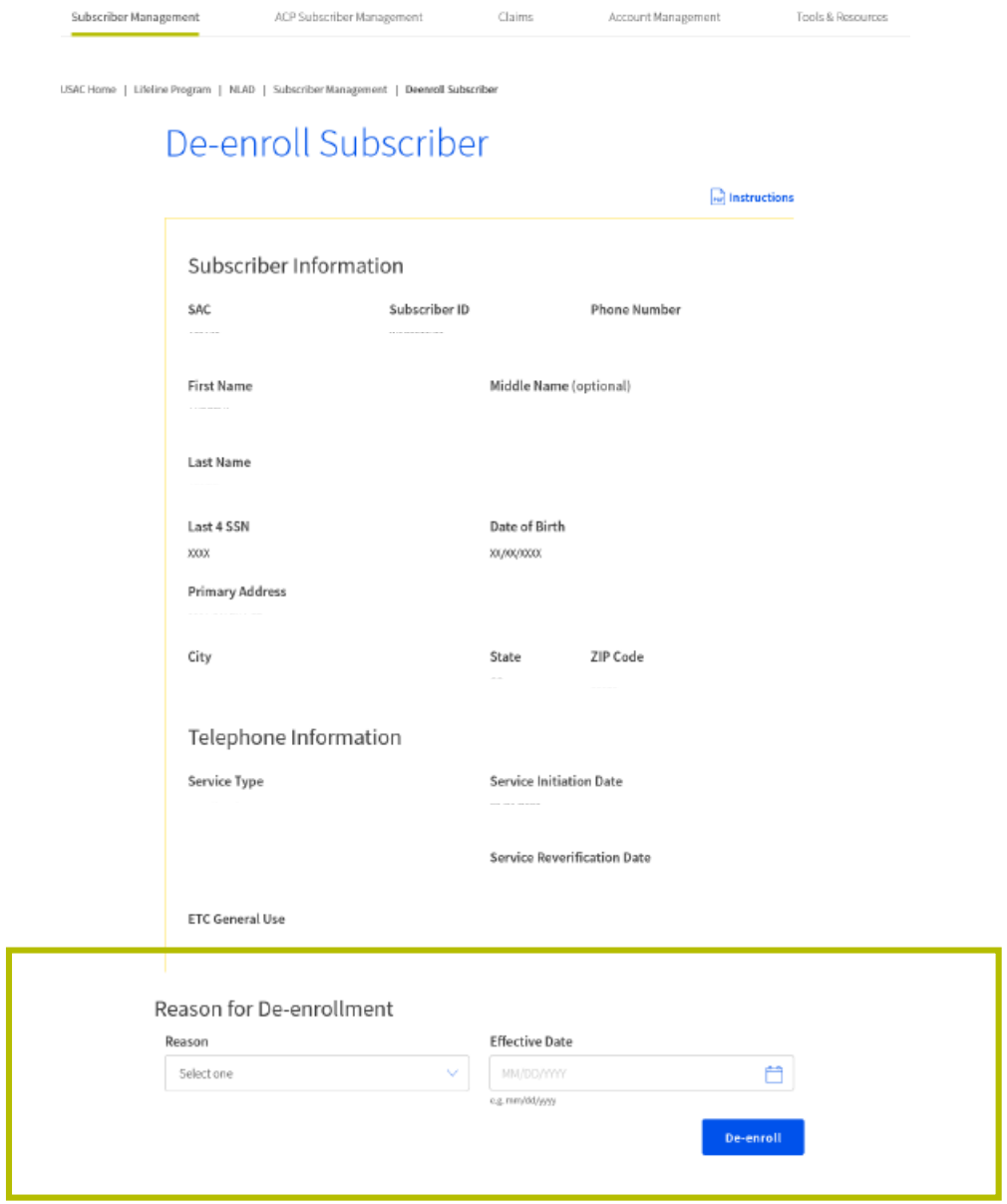
Verify Subscriber Information

- 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

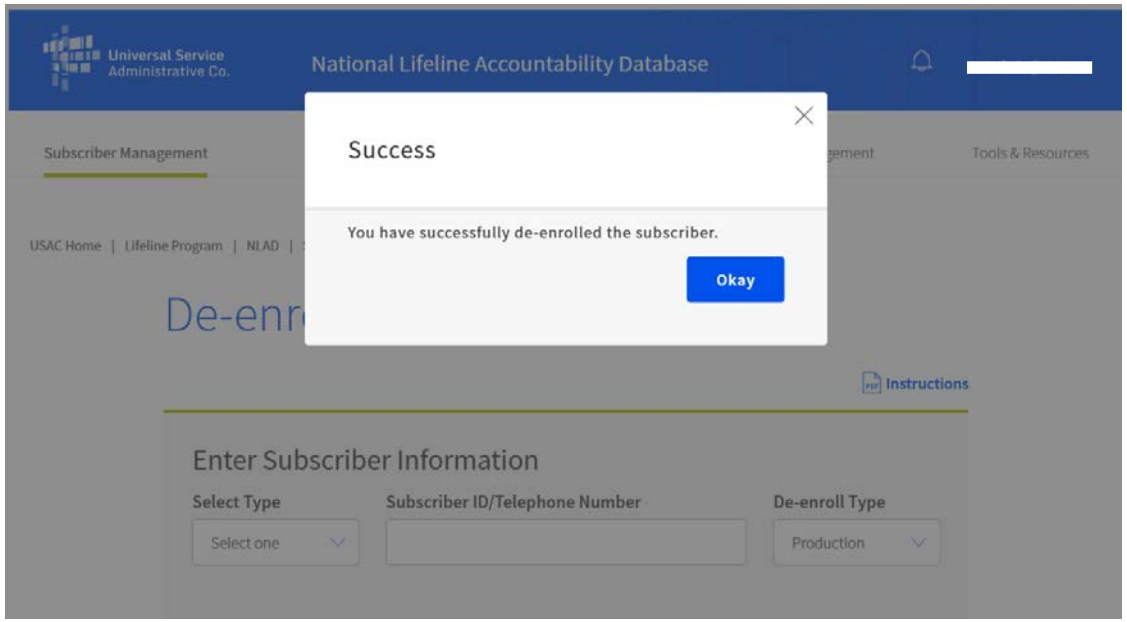
- Select the de-enrollment reason
  - Subscriber is deceased
  - Subscriber is leaving the program
  - Subscriber failed to recertify
  - Subscriber non-usage
- Select the effective date
  - Date that the de-enrollment of the subscriber occurs with the service provider and marks the last day of the subscriber's enrollment in the Lifeline program
- Click **De-Enroll**



De-Enroll Subscriber

Verify Subscriber Information

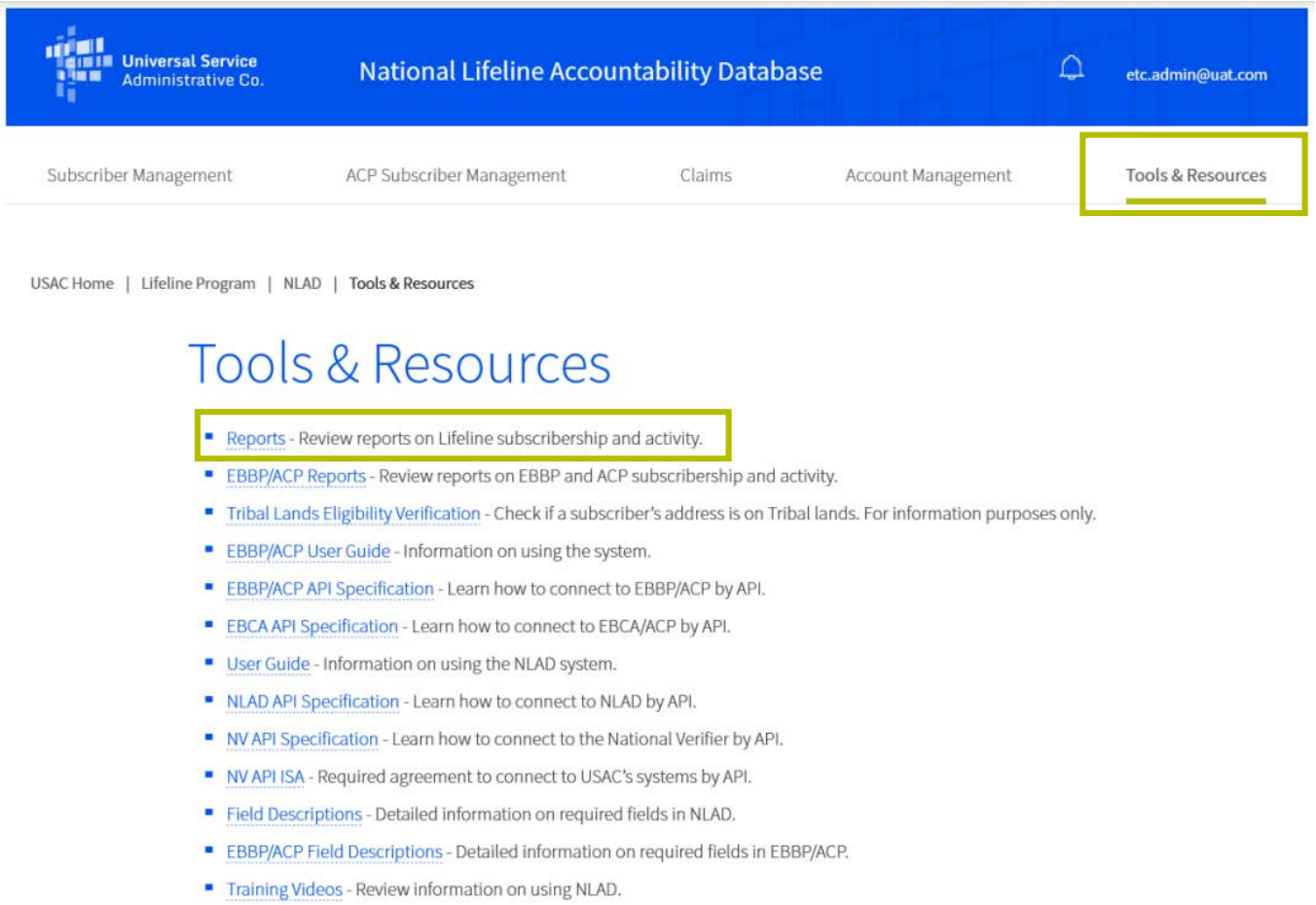
- Upon successful de-enrollment, you will receive confirmation that the subscriber was de-enrolled



View Reports

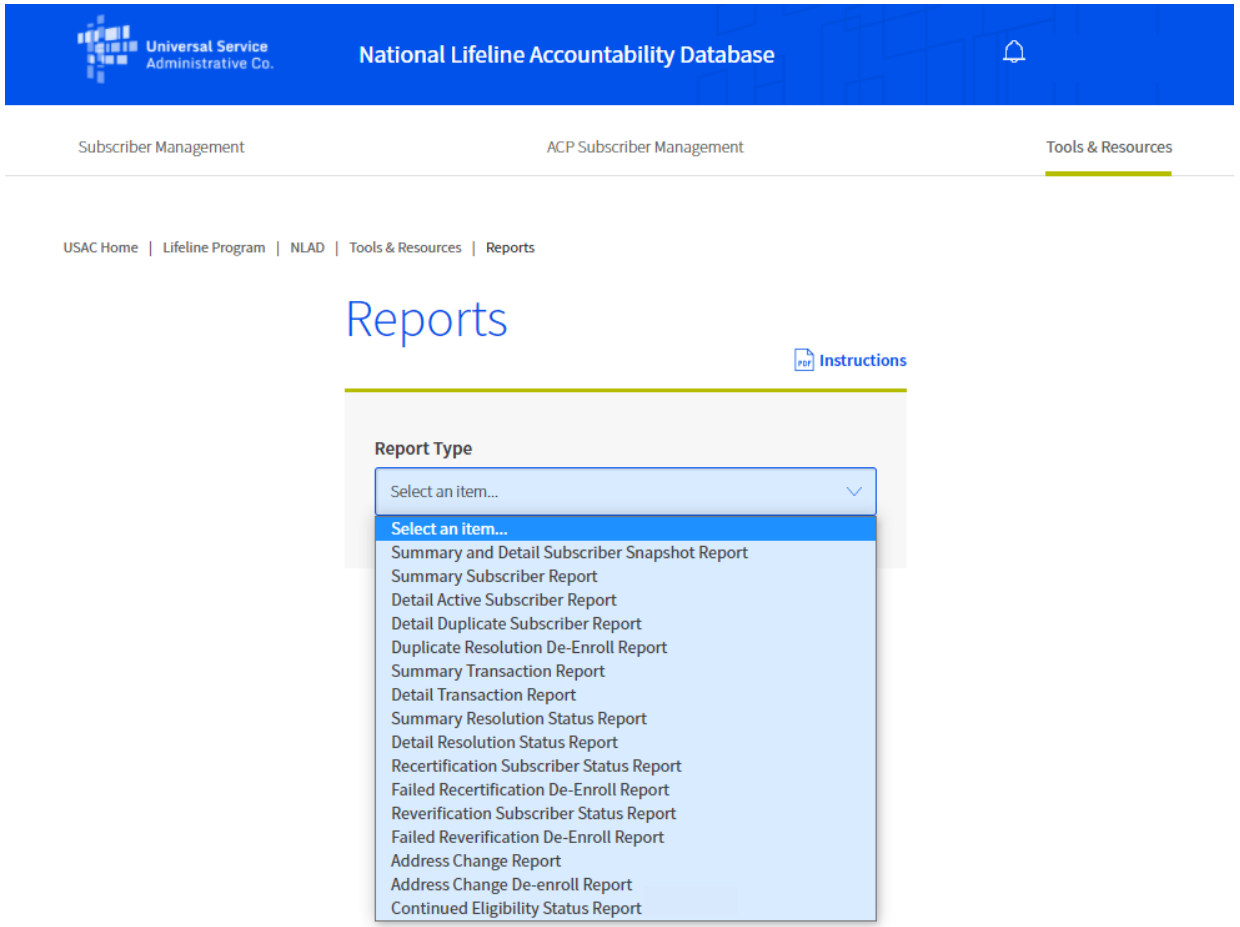
Reports

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



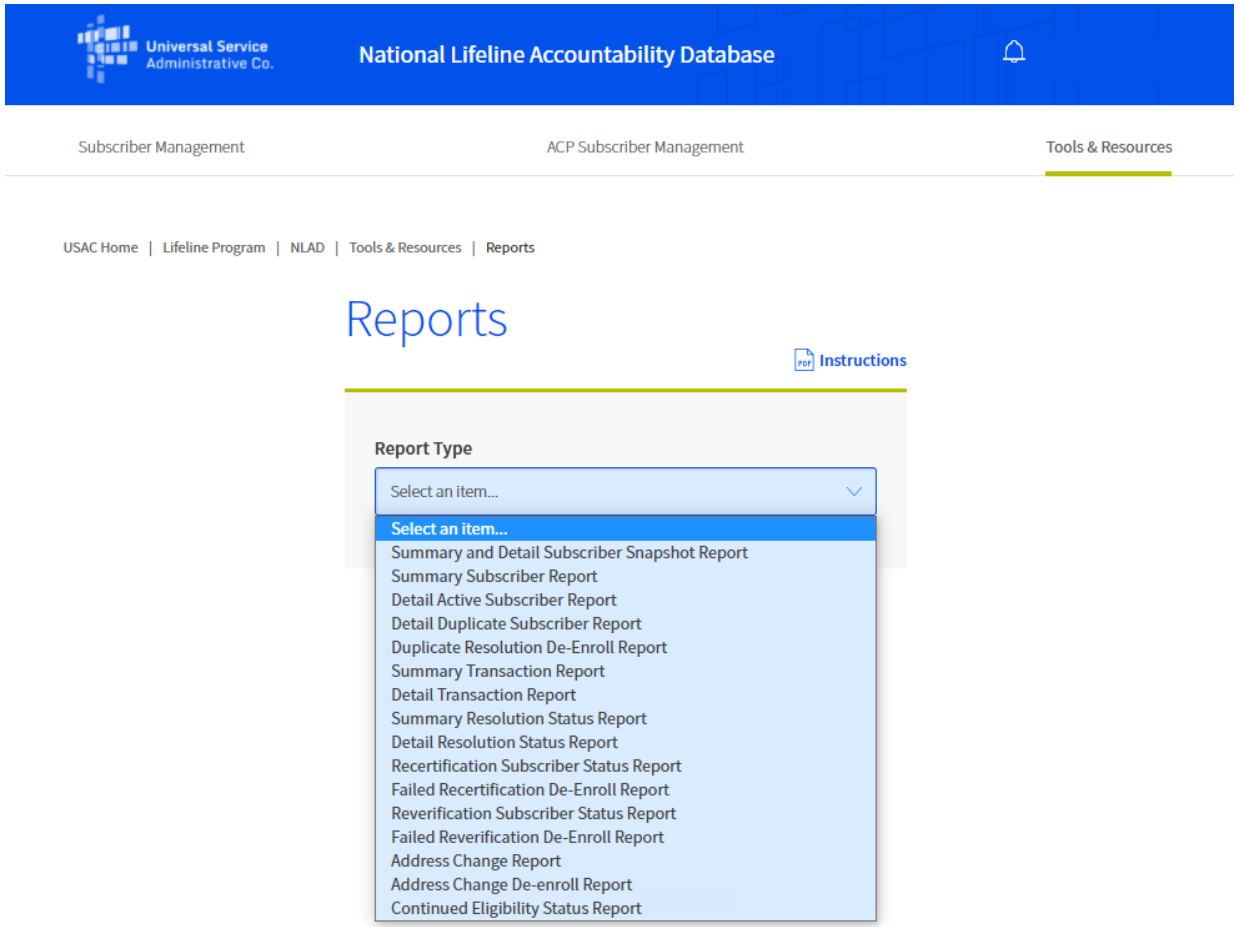
Reports

- 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

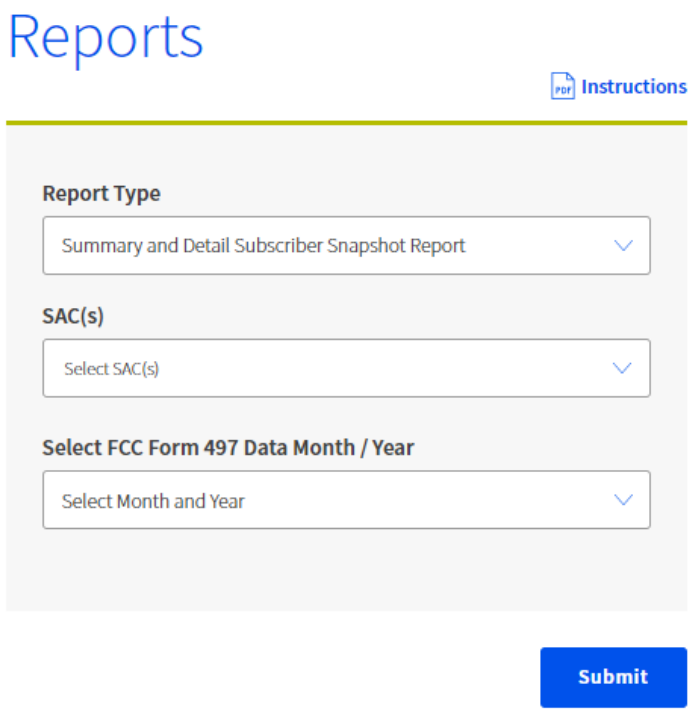
- Select a report to generate from the Report Type field
- Select criteria for all required filters
  - **Report Type**: allows you to select a specific report available in NLAD
  - **SAC**: Optional field that allows you to filter by one or many SACs
  - **SPIN**: Optional field that allows you to filter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



Reports

Summary and Detail Subscriber Snapshot Report

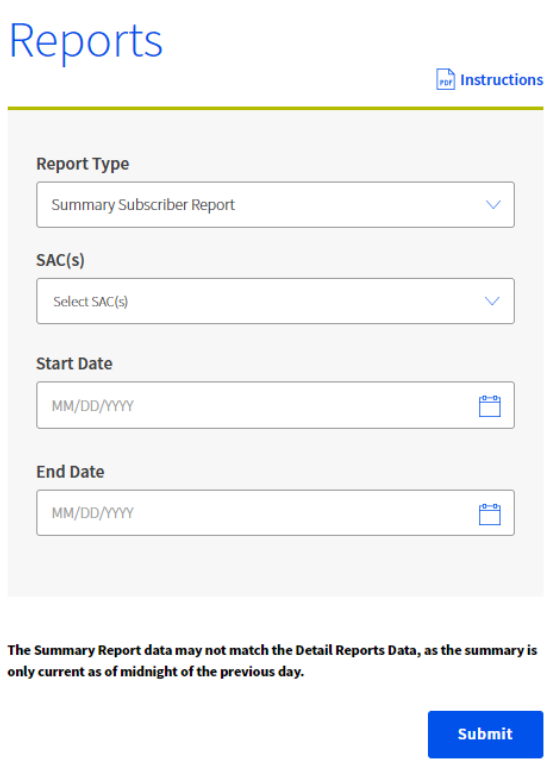
- Shows the monthly snapshot of active subscribers (taken on the 1st of the month)
  - Summary report shows the total non-Tribal and Tribal subscribers by SAC for selected data month
  - Detailed report shows the listing of all active subscribers' records by SAC for the selected data month



Reports

Summary Subscriber Report

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



Reports

Detail Active Subscriber Report

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

Reports

Instructions

Report Type

Detail Active Subscriber Report

SAC(s)

Anniversary Month (optional)

Select Month

Report Format

Display on web page (limited to first 500 responses)

Submit

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.

Export to CSV

Displaying 1-25 of 40 records

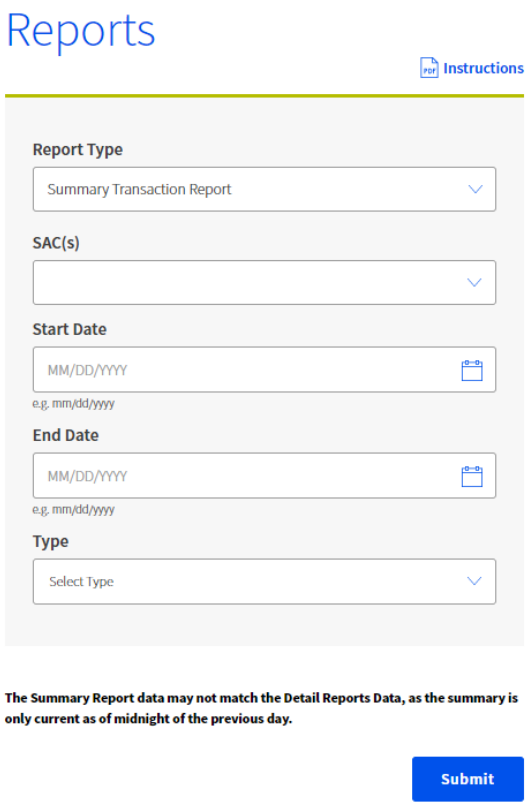
Instructions

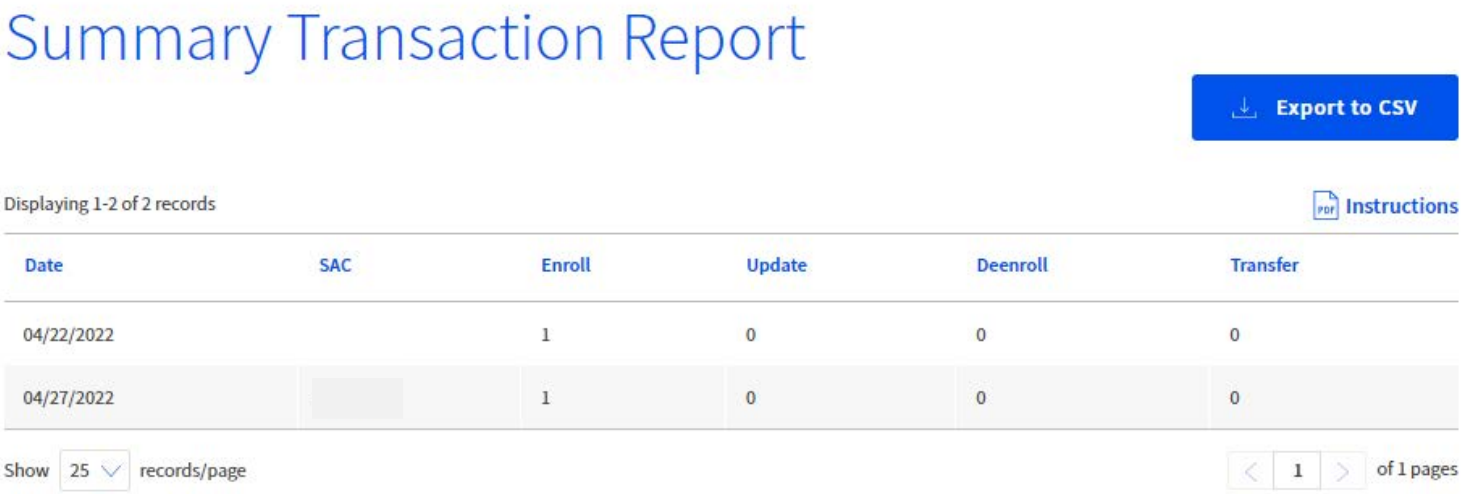
Study Area Code	Enrollment Date	Last Transaction Type	Last Name	First Name	Subscriber ID	Telephone Number	Service Type	Lifeline Tribal Benefit Flag	Anniversary Date
							BUNDLEDVOICEBROAD...	0	Sep 30
							BUNDLEDVOICEBROAD...	0	Sep 24
							BUNDLEDVOICEBROAD...	0	Oct 1
							BUNDLEDVOICEBROAD...	0	Sep 24
							VOICE	0	Sep 20
							VOICE	0	Oct 2
							VOICE	0	Nov 21

Reports

Summary Transaction Report

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

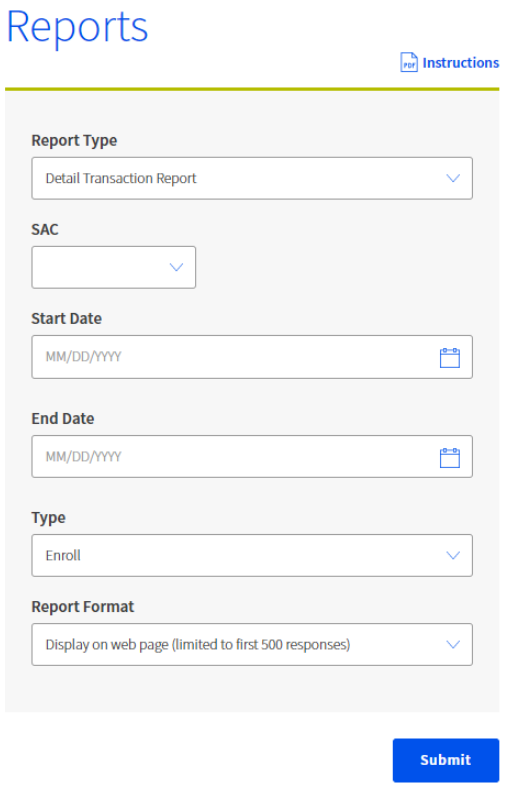


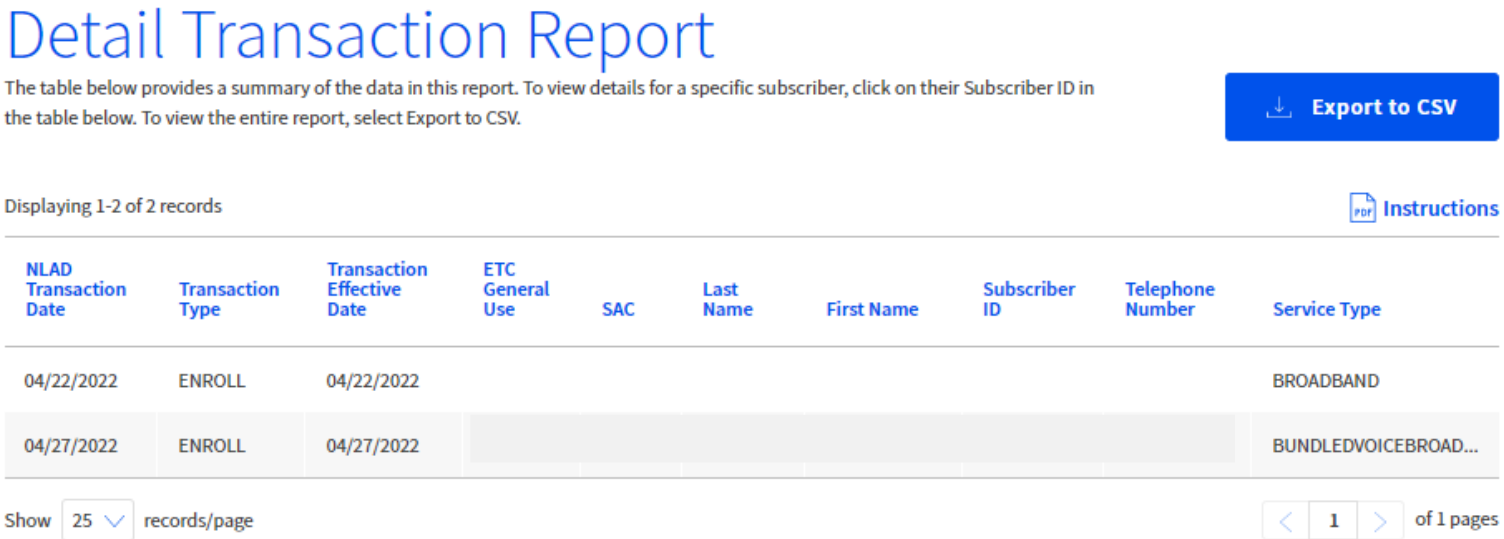


Reports

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

Reports

Instructions

Report Type

Recertification Subscriber Status Report

SAC(s)

Type

Recertified

Report Format

Display on web page (limited to first 500 responses)

Submit

Recertification Subscriber 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.

Export to CSV

Instructions

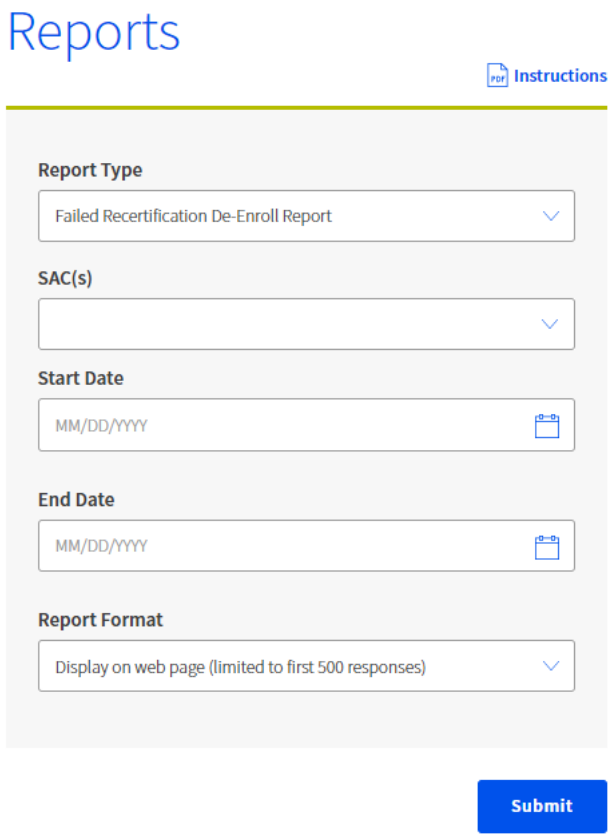
Recertification Status	SAC	Subscriber ID	ETC General Use	Last Name	Sub Recert Deadline	Eligibility Docs Required	Eligibility Docs Accepted	Eligibility Doc Rejection Reason	Address Resolution Required

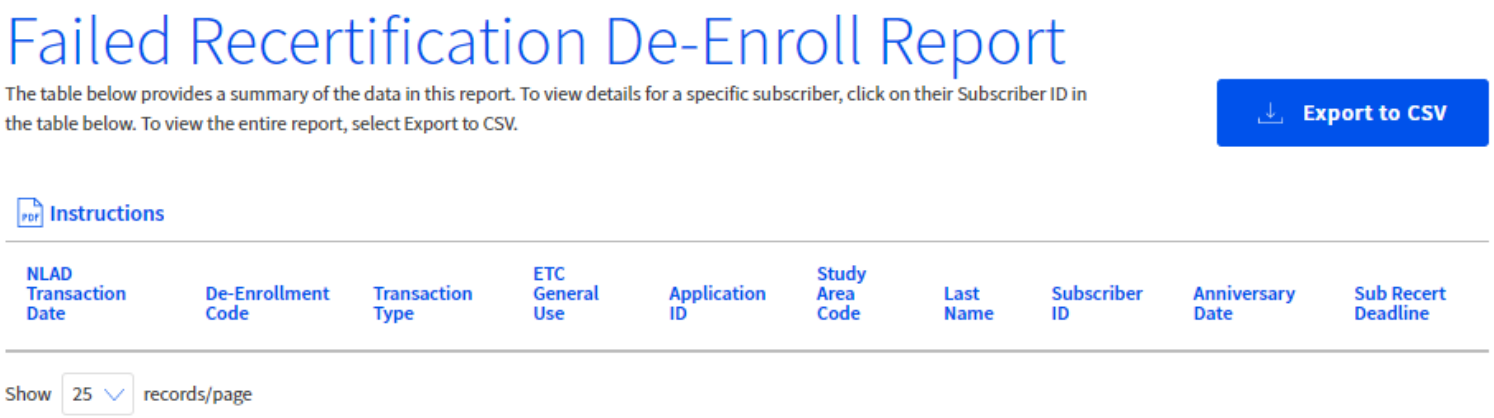
Show 25 records/page

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

Reports

Instructions

Report Type

Reverification Subscriber Status Report

SAC(s)

Group

Status

Report Format

Display on web page (limited to first 500 responses)

Submit

Reverification Subscriber 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.

Export to CSV

Displaying 1-25 of 38 records

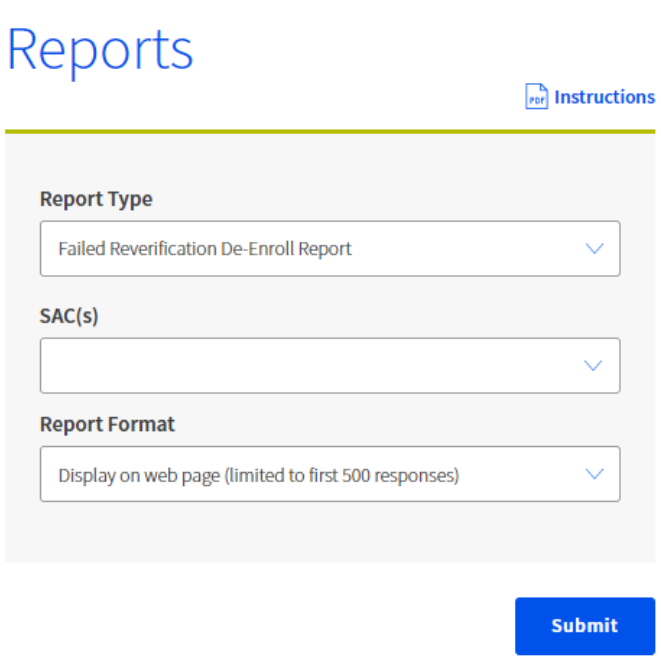
Instructions

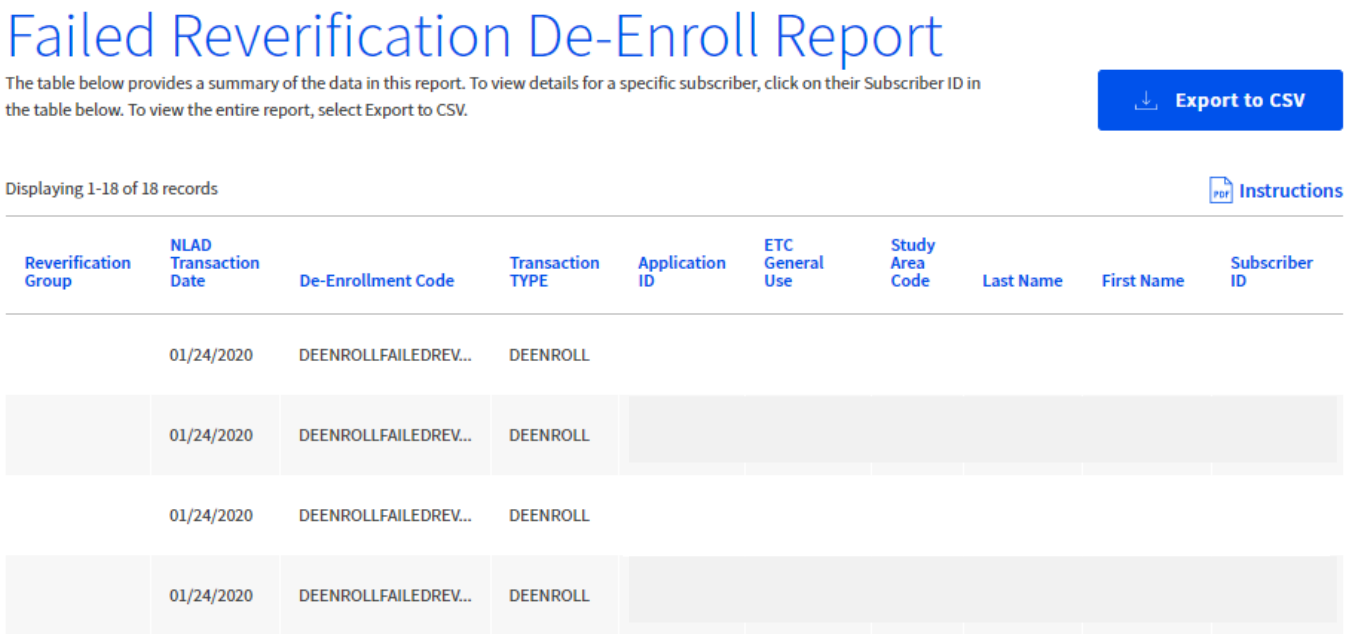
Reverification Group	Application ID	Study Area Code	ETC General Use	Last Name	First Name	Subscriber ID	Last Updated Date	Reverification Check Decision
2	V99308-95630	100002		DYER SR	RODNEY	1UA6E60EF	09/28/2019	PASS
2	V95827-58989	100002		HARRINGTON	MARK	G03AJWF9U	09/29/2019	PASS
2	V92652-49443	100002		BENNETT	DAVID	G0U68AGB3	09/29/2019	PASS
3	V90530-54549	100002		TAYLOR	ANGELA	BNSAN3752	09/29/2019	PASS
2	V90082-63375	100002		BONNEY	ALLIENE	N03685TA1	09/30/2019	PASS

Reports

Failed Reverification De-Enroll Report

- Shows subscribers de-enrolled for a failure to complete reverification

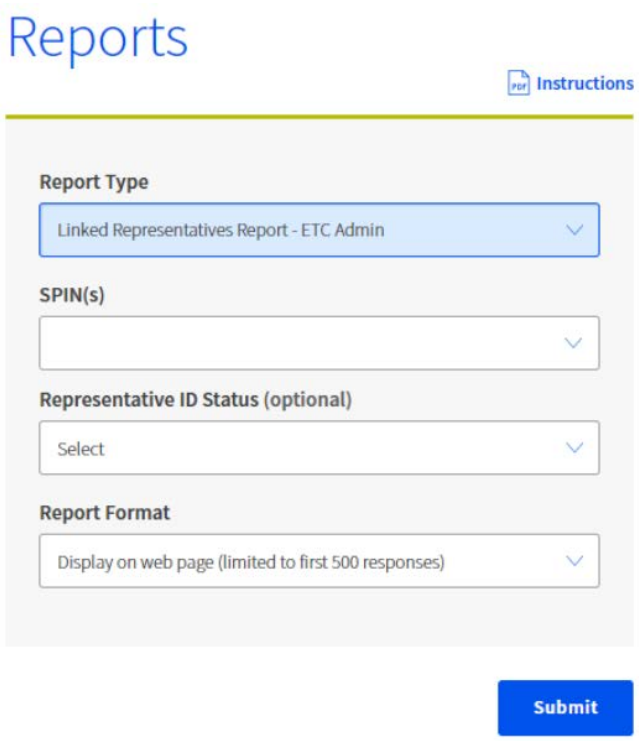




Reports

Linked Representatives Report – ETC Admin

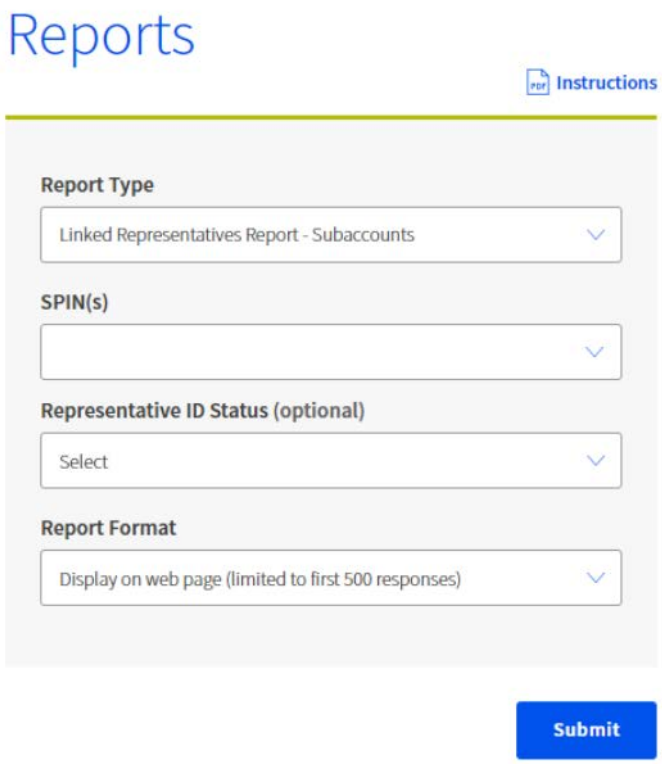
- Shows ETC Administrators that are linked to a particular SPIN
  - This report is only available to 497 Officers



Reports

Linked Representatives Report – Subaccounts

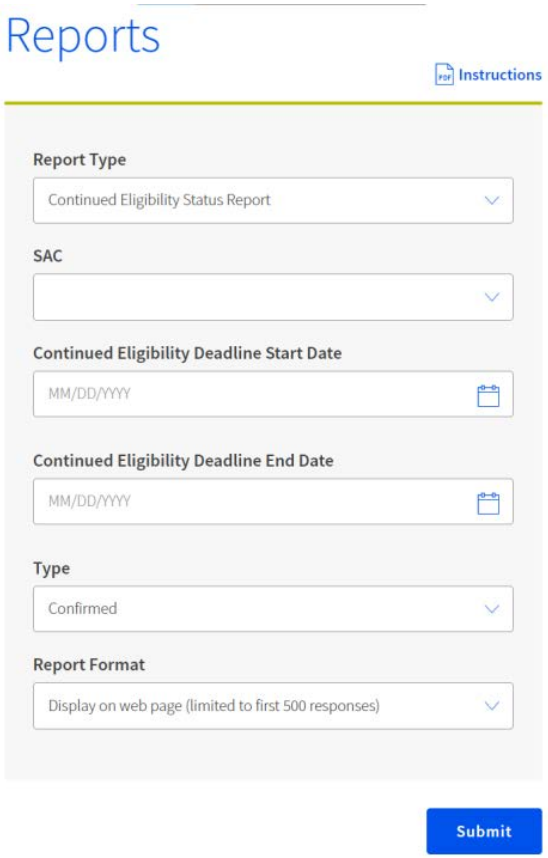
- Shows NLAD subaccount users that are linked to a particular SPIN
  - This report is only available to ETC Administrators

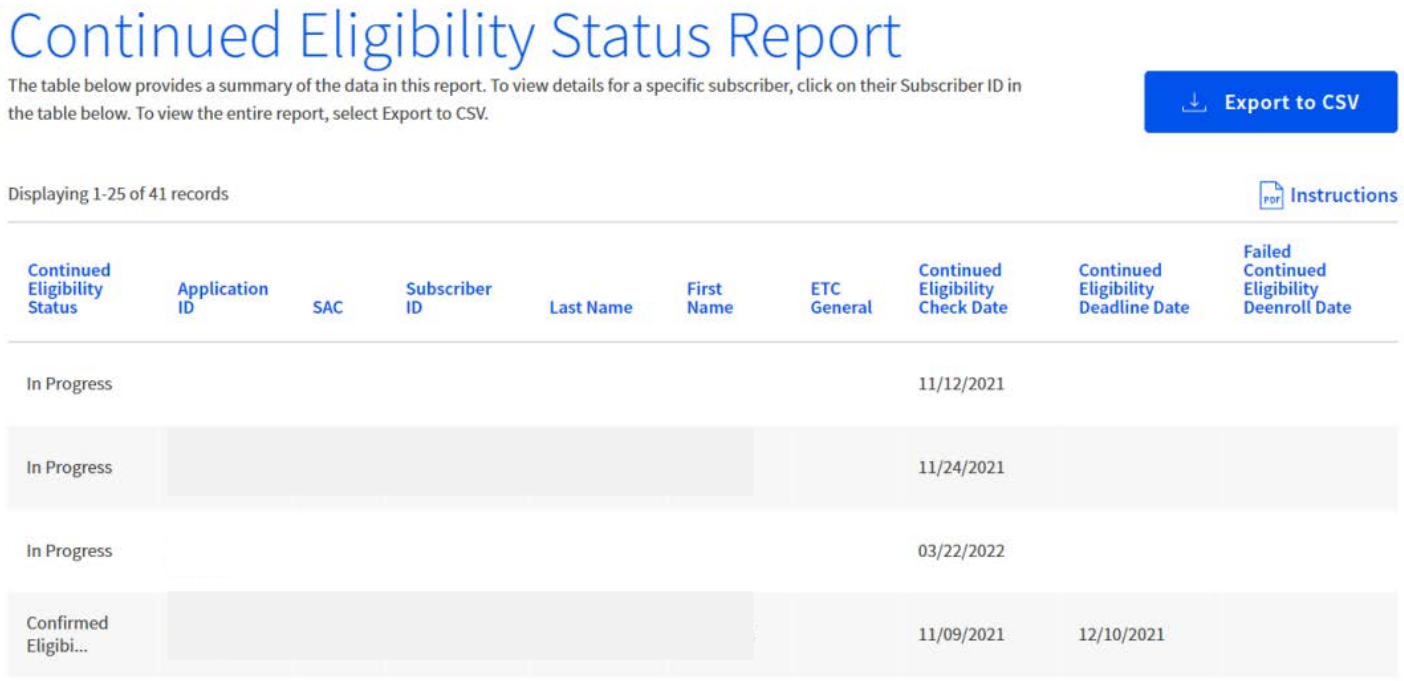


Reports

Continued Eligibility Status Report

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





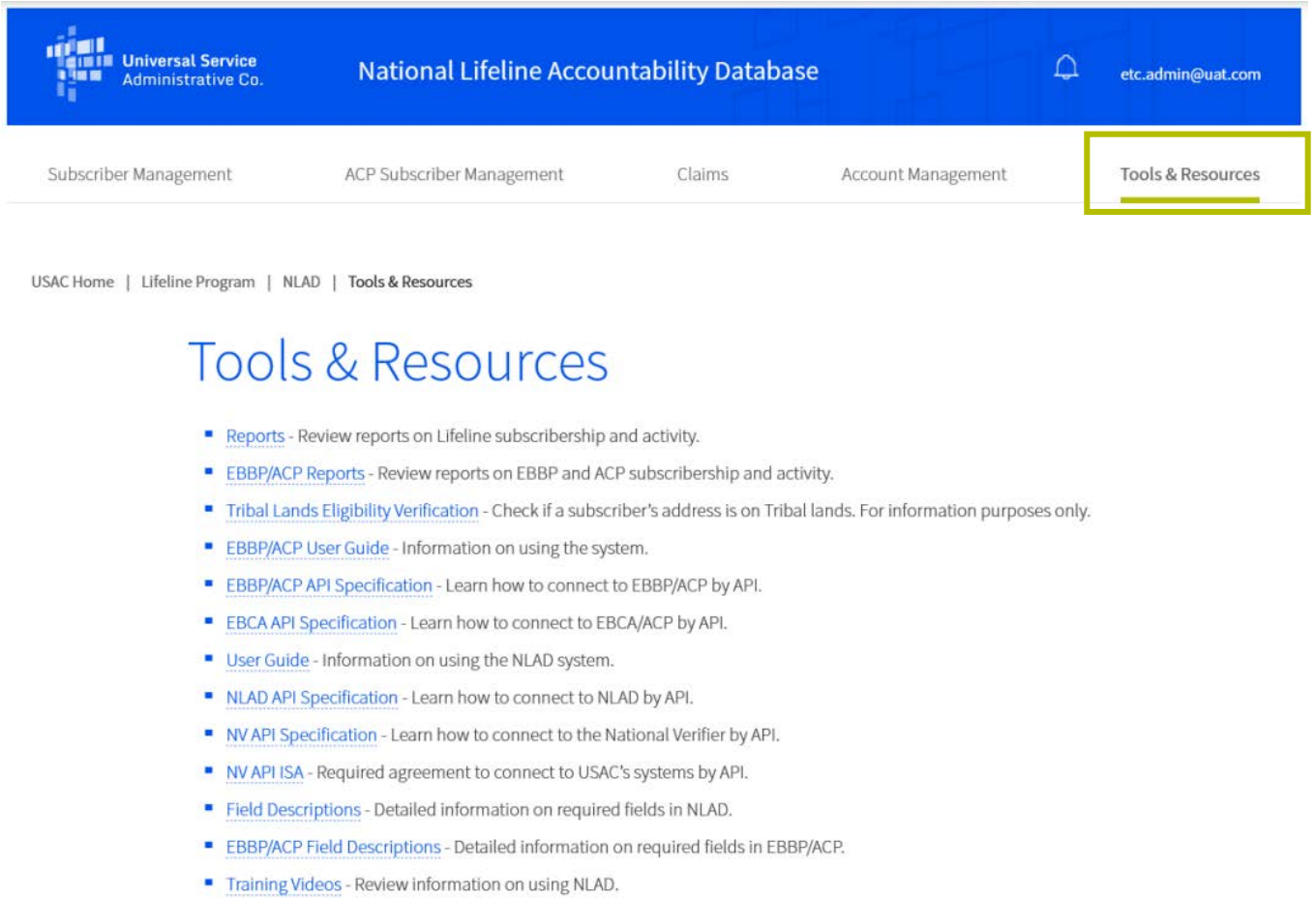
Questions?

Resources

Resources

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

- Reports
- User Guide
- API Specifications
- Field Descriptions



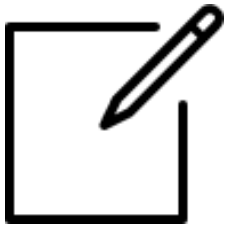
NLAD Resources

- 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

Learn More About Lifeline

- Sign up for Lifeline email updates and upcoming events
  - Visit usac.org and click “subscribe” in the upper-right corner
- Need help? Contact us!
  - General inquiries: LifelineProgram@usac.org

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!

Universal Service
Administrative Co.