

April 2023 Monthly Webinar NLAD 101 April 12, 2023

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- 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



Hannah Fofana

Communications Specialist

Hannah develops internal and external communications for Lifeline and State/Fed partners.



Winta Woldu

Communications Specialist

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

Meet Our Team



Linnita Hosten

Senior Communications Specialist

Linnita develops external communications and creates content about Lifeline systems and program changes.



Delante Cherry

Communications Specialist

Delante develops internal and external communications.

Today's Objectives



- To be able to navigate the National Lifeline Accountability Database (NLAD)
- To enroll a subscriber in NLAD
- To understand the high-level functionality of the NLAD system and different types of NLAD user accounts
- To understand the role and responsibility of service providers when using NLAD

Agenda

- Announcements
- Program Overview
- NLAD Overview
- Lifeline Subscriber Management
 - Portal
 - Batch Upload
 - API
- Resources

AnnouncementsLifeline Mailing Address Updated

- The mailing address for the Lifeline Customer Support Center (CSC) transitioned to a new address at the end of March
- Mail sent to the old mailing address will be forwarded for a period of time to ensure no interruption in application/document processing
- Service providers should update their consumer outreach materials including FCC forms that contain the current ACP and Lifeline CSC mail address

Announcements 2023 Federal Poverty Guidelines Updated

- The <u>2023 Federal Poverty Guidelines (FPG)</u> were released on January 19, 2023
 - 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

Lifeline Program Overview

Lifeline ProgramLifeline Benefit

- Eligible program participants can receive a discount of up to \$9.25 per month, for qualifying fixed or mobile services
 - Can be applied to broadband or bundled voice and broadband services that meet the minimum service standards
- Eligible participants can receive up to \$5.25 for voice-only services
- Program participants who live on qualifying Tribal lands can receive enhanced support of up to an additional \$25 per month
- **Link Up**: a Tribal lands one-time benefit up to \$100 for initial set up fees at residences in specific areas



Lifeline Program

Application Process

Consumers may apply through the National Verifier (NV) using **one** of the three options:

Option 1:

Apply Online

- The consumer visits
 <u>https://nv.fcc.gov/lifeline</u>
- The online application is accessible from any computer or mobile device

Option 2:

Apply by Mail

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

Option 3:

Apply Through a Service Provider or Tribal Partner

- The consumer applies with the assistance of a service provider or Tribal partner
- Service providers or Tribal partners may submit an online application on the consumer's behalf using the NV service provider portal (also available at https://nv.fcc.gov/lifeline), or
- Through the <u>National Verifier Eligibility</u>
 <u>Check API</u> if the service provider has elected to use that option

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 <u>NLAD section</u> 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

Can perform subscriber transactions, query subscriber data, and view reports

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

ETC Operations

Can query subscriber data and view reports

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

ETC Agent

Only has access to the National Verifier to check consumer eligibility

- To perform transactions in NLAD and the National Verifier, service provider representatives must <u>register for a Representative ID</u> (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:

- 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 a 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

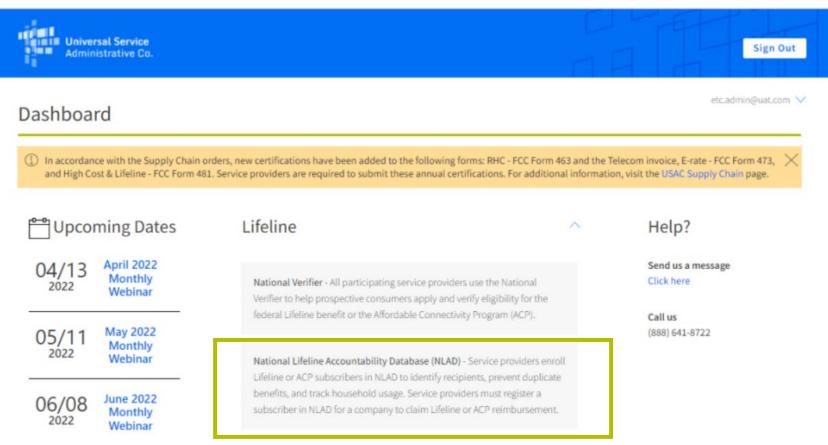
Reminder: To perform applicable NLAD transactions, NLAD users are required to register for a Rep ID and have that Rep ID linked to their account. For more information, visit the <u>RAD Resources</u> page

Poll

Questions?

Lifeline Subscriber Management

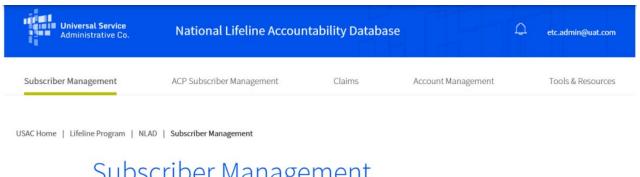
 Access NLAD through <u>One Portal</u>



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



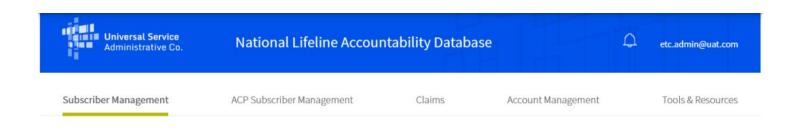
Subscriber Management

Welcome to NLAD Subscriber Management. Here you can enroll, transfer, update, or de-enroll a subscriber and ensure your records are up to date. For assistance, please refer to the Instructions guide on each of the pages

- Enroll Subscriber Enroll a qualified subscriber in the Lifeline Program. Also used to verify a subscriber's eligibility and
- Transfer Lifeline Benefit Transfer a qualified subscriber's benefit to your company.
- Update Subscriber Update an existing subscriber's NLAD record.
- Upload Subscriber File Perform batch transactions. Enroll, transfer, update, or de-enroll more than one subscriber at a
- De-Enroll Subscriber Remove a subscriber who no longer receives a Lifeline benefit
- Lookup Subscriber Verify whether or not a consumer already receives the Lifeline benefit.
- Submit Resolution Request Submit a resolution request for a transaction rejected in the legacy workflow.

Enroll Subscriber

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



USAC Home | Lifeline Program | NLAD | Subscriber Management

Subscriber Management

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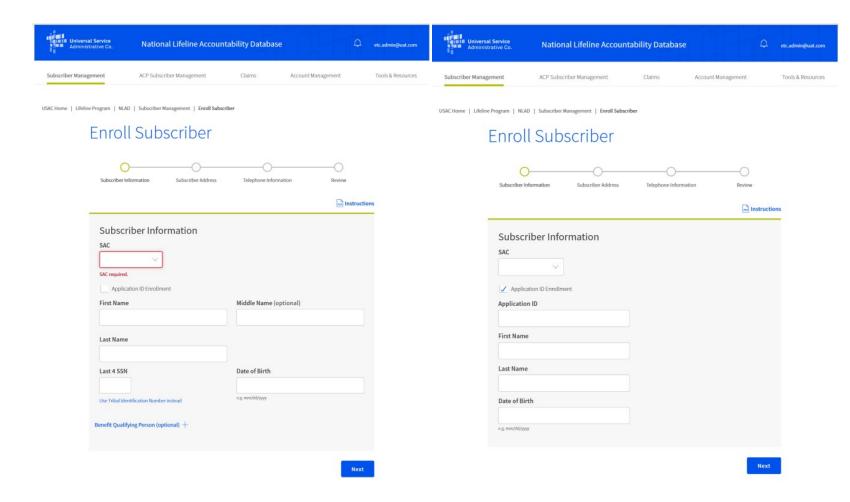
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Enroll Subscriber

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

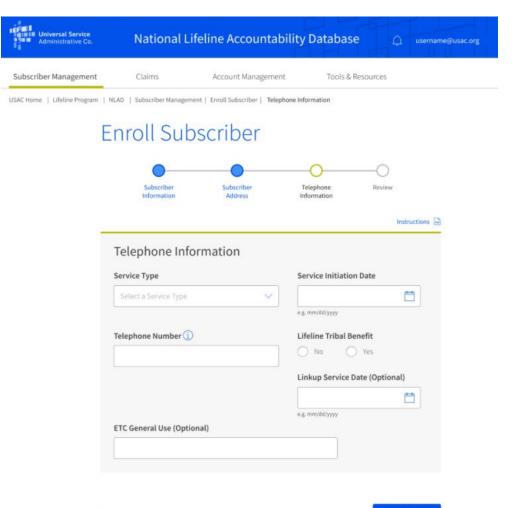
OR

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



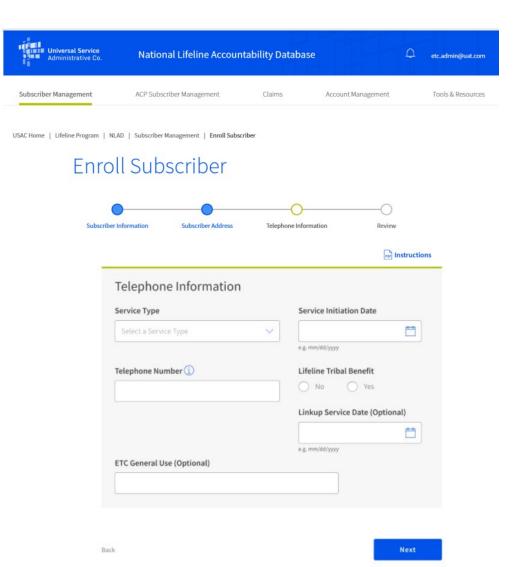
Service Information (1 of 2)

- 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)



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



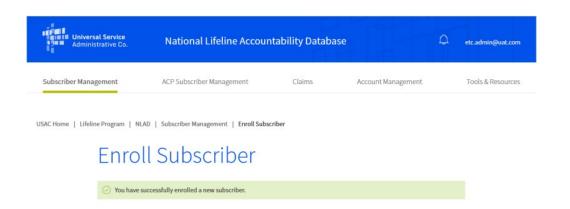
Lifeline Subscriber Management – Portal Enrollment Status

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



Lifeline Subscriber Management – Batch UploadOverview

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

- Batch uploads can:
 - Contain one or many transactions
 - Include multiple Study Area Codes (SACs) and transaction types

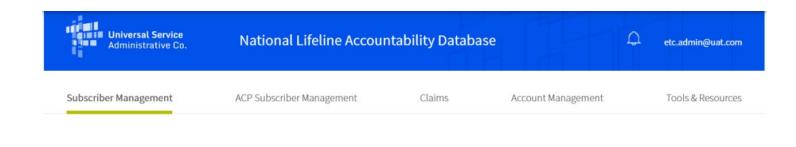
Lifeline Subscriber Management – Batch UploadPrepare Batch Files

- Fill in the <u>batch template</u> 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 <u>detailed field descriptions</u>
- 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



Subscriber Management

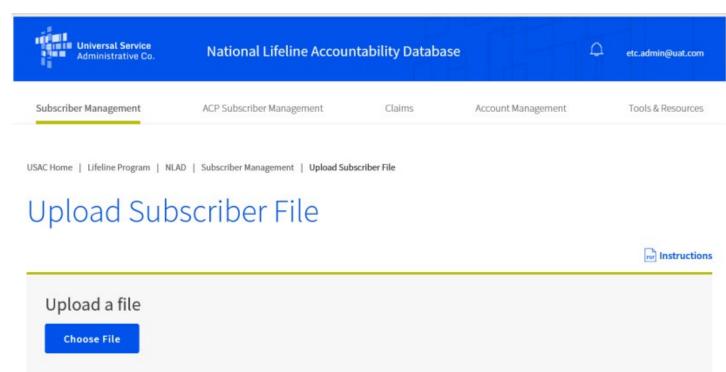
USAC Home | Lifeline Program | NLAD | Subscriber Management

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Lifeline Subscriber Management – Batch Upload Upload Subscriber File

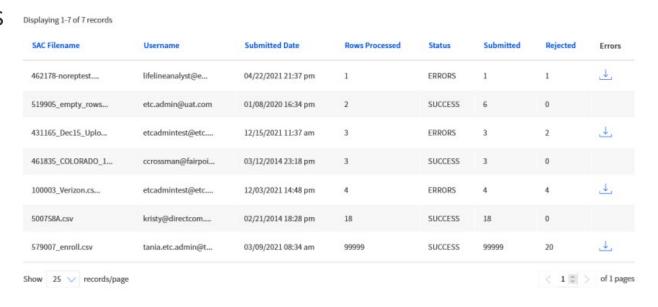
- Click "Choose File" button and select the file you want to upload, then
- Click "Upload" button to submit the file



Enrolling Subscribers Using Batch Load 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



Poll

Questions?

Lifeline Subscriber Management - NLAD API

Lifeline Subscriber Management – NLAD APIOverview

- The NLAD Application Programming Interface (API) allows for a computer-tocomputer 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 APIAPI 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 <u>NLAD API Specifications</u> 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 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 APIAPI Access to NLAD

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

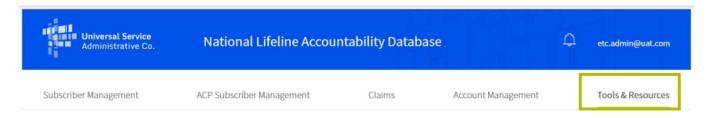
- API ID(s) they would like to register for API production access
 - If provider has not created an API ID yet, the ETC Administrator can create an API account in NLAD
- Completed and signed ISA
- The domain information for the service provider

Available for Public Use Resources 41

Resources

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

- Reports
- User Guide
- API Specifications
- Field Descriptions



USAC Home | Lifeline Program | NLAD | Tools & Resources

Tools & Resources

- Reports Review reports on Lifeline subscribership and activity.
- EBBP/ACP Reports Review reports on EBBP and ACP subscribership and activity.
- Tribal Lands Eligibility Verification Check if a subscriber's address is on Tribal lands. For information purposes only.
- EBBP/ACP User Guide Information on using the system.
- EBBP/ACP API Specification Learn how to connect to EBBP/ACP by API.
- EBCA API Specification Learn how to connect to EBCA/ACP by API.
- User Guide Information on using the NLAD system.
- NLAD API Specification Learn how to connect to NLAD by API.
- NV API Specification Learn how to connect to the National Verifier by API.
- NV API ISA Required agreement to connect to USAC's systems by API.
- Field Descriptions Detailed information on required fields in NLAD.
- EBBP/ACP Field Descriptions Detailed information on required fields in EBBP/ACP.
- Training Videos Review information on using NLAD.

NLAD Resources



- More information can be found on the <u>NLAD section</u> of our website, including:
 - National Verifier NLAD Input Templates Field Names and Descriptions
 - NLAD Maintenance Schedule and Release Notes



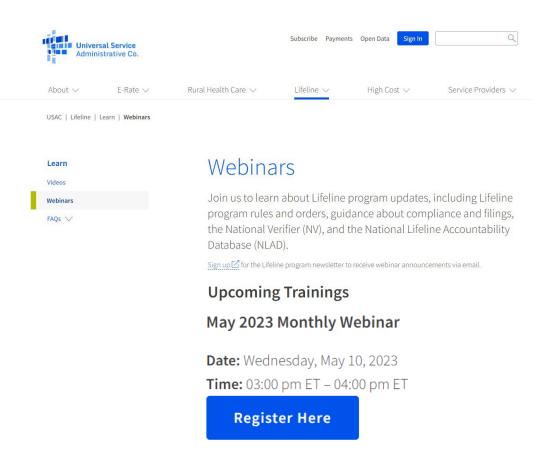
 Contact <u>LifelineProgram@usac.org</u> for technical questions and assistance and general NLAD inquiries



Subscribe to receive the <u>NLAD Bulletin</u>

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,
 <u>Register Here</u>



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: <u>LifelineProgram@usac.org</u>

Questions?

We'd love your feedback

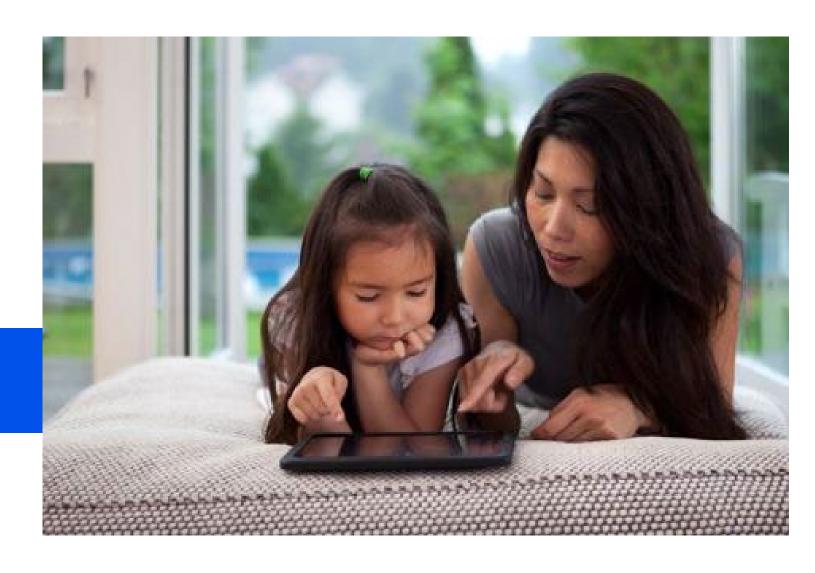


- We want to hear what topics you'd like the Lifeline Communications team to cover in future webinars this year.
- Please provide your responses to the questions box now.
- Thank you!

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- 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!

