June 2023 Monthly Webinar
Account Management in Lifeline Systems

June 14, 2023
To accommodate all attendees, real-time closed captions will be present during this presentation. This feature is 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 Presenters

Delante Cherry
Communications Specialist
Delante develops internal and external communications.

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.

**Hannah Fofana**
Communications Specialist
Hannah develops internal and external communications for Lifeline and state/federal partners.
Objectives

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

be able to:

• Assign a 497 Officer in E-File.
• Manage accounts in NLAD.

understand:

• Account management functions in our systems.
• Various user role types such as a 498 Officer, 497 Officer, ETC administrator, etc.
Agenda

• Program Updates
  • Recertification

• Account Management
  • E-File
    • Certify 497 Officer Entitlements
    • Assign 497 Officer
    • Remove Entitlements
  • NLAD
    • Create ETC Administrator
    • Create NLAD Subaccounts
    • Manage NLAD Subaccounts

• Resources
Program Updates
Recertification

• **Recertification** is an annual requirement for Lifeline subscribers. USAC conducts recertification to ensure that active Lifeline subscribers, including those who also participate in the Affordable Connectivity Program (ACP), are still eligible for the Lifeline benefit.

• On May 1, 2023, USAC initiated automated eligibility database checks to verify the eligibility of all Lifeline subscribers due for recertification in 2023. This process will occur over the course of a few months.
  
  • Subscribers who **pass** the automated check will complete the 2023 recertification requirement and will not need to take any action for their 2023 recertification.
  
  • Subscribers who **fail** the automated check will be required to recertify their continued eligibility through a manual process. USAC will conduct outreach to those subscribers.
Recertification
What This Means for Subscribers

• In May, USAC began outreach to subscribers who failed the automated eligibility checks. Subscribers have approximately 60-days to recertify through a manual process.

• If a subscriber receives a letter in the mail from USAC, they must take action to recertify their benefit. Subscribers will need to complete the Lifeline Recertification Form (English and Spanish). Some subscribers will need to provide income or eligibility documentation to prove their continued eligibility for the program. USAC will notify subscribers if they need to provide documentation.

• Lifeline Recertification is still underway. Providers can check the Recertification reports daily for more information.
Recertification

What This Means for Service Providers

• Service providers should regularly monitor the “Recertification Subscriber Status Report” in the National Lifeline Accountability Database (NLAD) to identify subscribers undergoing recertification. This report will update daily to reflect the results of the automated checks.

• USAC encourages service providers to educate subscribers about USAC, why we are reaching out to them, and our recertification process. However, service providers should not provide or estimate deadlines, as these deadlines are subject to change.

• To learn more about the recertification process, visit the Recertification webpage or view the Recertification 101 training.
Account Management
Account Management
Accessing Lifeline Systems

- Getting access to Lifeline systems, including the National Lifeline Accountability Database (NLAD), starts with E-file:

  **Step 1**
  - 498 Officer
    - Assigns 497 Officer and 497 User entitlements in E-File

  **Step 2**
  - 497 Officer
    - Creates the ETC Administrator user role in NLAD
  - ETC Administrator
    - Creates NLAD subaccounts (ETC Operations, ETC Analyst, ETC Agent) in NLAD
E-File
**E-File**

**Overview**

**E-File** is the USAC system that service providers use to submit the FCC Form 498 (a form used to collect remittance, payment, and contact information for companies that receive support from any of the universal service programs).

1. **E-File** 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.

2. The Company Officer listed on FCC Form 498 on file with USAC can access the form online using E-File and can establish authorized users.
## E-File

### Account Types for E-File

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>498 Officer</strong></td>
<td>Authorized to certify the FCC Form 498</td>
</tr>
<tr>
<td></td>
<td>Also assigns and manages the 497 Officer and 497 User roles in E-File</td>
</tr>
<tr>
<td><strong>497 Officer</strong></td>
<td>Certifies reimbursement claims and manages the ETC Administrator user role in NLAD</td>
</tr>
<tr>
<td><strong>497 User</strong></td>
<td>Can upload, modify, and submit claims, but cannot certify claims</td>
</tr>
</tbody>
</table>
Certify 497 Officer Entitlements
E-File

497 Officer Entitlements

• 498 Officers have an entitlement as a 497 Officer, but must certify that entitlement in E-File to access NLAD.

• Your company’s 498 Officer must log in to E-File and either:
  • Certify themselves as the 497 Officer, or
  • Assign a 497 Officer entitlement to another person at the company.
Certify 497 Officer Entitlement

Access E-File

• As the 498 Officer, log in to USAC’s One Portal to access E-File:
  • Select Manage FCC Forms 498 under the Service Provider section of the dashboard.
Certify 497 Officer Entitlement

E-File Landing Page

- Select **Form 497** from the left hand menu.
Certify 497 Officer Entitlement

• Select Form 497 Officer and select OK to confirm.
  • For 498 Officers with multiple SPINs, it can take up to an hour for the entitlements to update in E-File.
Questions?
Assign a 497 Officer
Assign 497 Officer

- 498 Officers can assign a 497 Officer entitlement to either:
  - New users, or
  - Current E-File users associated with their company.
Assign 497 Officer

New Users

- As the 498 Officer, log in to USAC’s One Portal to access E-File:
  - Select **Manage FCC Forms 498** under the Service Provider section of the dashboard.
**Assign 497 Officer**

**New Users**

- Select **New User** under the Authorized Users section of the left-hand navigation menu.
Assign 497 Officer
New Users

• Enter in the email address of the user you want to add the 497 Officer entitlements to, and
• Click Search.
Assign 497 Officer
New Users

• Enter in the user’s **first and last name** (these are the only required fields), and

• Click **Next**:  
  • Note: It may take a few seconds before the next page loads.
Assign 497 Officer
New Users

- Click the **LI Form 497** checkbox,
- Select **497 Officer** from the dropdown menu,
- Click the checkbox for the SPIN(s) the user should have 497 Officer entitlements, and
- Click **Save**.

```
<table>
<thead>
<tr>
<th>User Name</th>
<th>User Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>abcd</td>
<td><a href="mailto:abc@usac.org">abc@usac.org</a></td>
</tr>
</tbody>
</table>

Please ensure you add at least one entitlement above this user. In order to successfully create a user they must have at least one entitlement. Once you have added an entitlement the “save button” will be available.
```
Assign 497 Officer
New Users

• You will receive a confirmation message that the user was successfully added.
Assign 497 Officer

Current Users

- As the 498 Officer, log in to USAC’s One Portal to access E-File:
  - Select Manage FCC Forms 498 under the Service Provider section of the dashboard.
Assign 497 Officer

Current Users

- Select **Authorized Users** on the left-hand navigation menu to view current users,

- Select **Manage Entitlements** to modify the entitlements for an existing user.
Assign 497 Officer
Current Users

The Authorized User Management page will show the current user’s assigned entitlements:

- Select **LI 497** under the Available Entitlements section,
- Select **497 Officer** from the drop-down,
- Click the checkbox for the SPIN(s) the user should have 497 Officer entitlements, and
- Click **Assign**.

Authorized User Management - Entitlements

User Information

Email Address: John123@abc.com

Full Name: John Doe

Assigned Entitlements

Available Entitlements
Assign 497 Officer
Current Users

- You will receive a confirmation message that the user role was successfully assigned.

Result

Selected roles were assigned to John123@abc.com successfully!

Continue
Remove Entitlements
Remove 497 Officer Entitlements

- As the 498 Officer, log in to USAC’s One Portal to access E-File:
  - Select Manage FCC Forms 498 under the Service Provider section of the dashboard.
Remove 497 Officer Entitlements

- Select **Authorized Users** on the left-hand navigation menu,
- Select **Manage Entitlements** to remove the entitlements for an existing user.
Remove 497 Officer Entitlements

- Select **LI 497** under the Assigned Entitlements section,
- Select the **SPIN(s)** where the user should no longer have 497 Officer entitlements, and
- Click **Remove**.
Remove 497 Officer Entitlements

- You will receive a confirmation message that the user was successfully removed.

Result

Selected roles were removed from MarySmith@abc.com successfully!

Continue
Questions?
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)

<table>
<thead>
<tr>
<th>497 Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must certify reimbursement claims and <strong>manages the ETC Administrator user role</strong> in NLAD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ETC Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Manages subaccounts</strong> (Analyst, Operations, and Agent) and can perform subscriber transactions, query subscriber data, and view reports</td>
</tr>
</tbody>
</table>

User also has access to the National Verifier to check consumer eligibility
# National Lifeline Accountability Database (NLAD)

## Account Types (2 of 2)

<table>
<thead>
<tr>
<th>ETC Analyst</th>
<th>ETC Operations</th>
<th>ETC Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>This user can perform subscriber transactions, query subscriber data, and view reports.</td>
<td>This user can query subscriber data and view reports.</td>
<td>This user <strong>only</strong> has access to the National Verifier to check consumer eligibility.</td>
</tr>
<tr>
<td>User also has access to the National Verifier to check consumer eligibility.</td>
<td>User also has access to the National Verifier to check consumer eligibility.</td>
<td></td>
</tr>
</tbody>
</table>

- 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.
Create ETC Administrator
Create ETC Administrator

- As the 497 Officer, log in to USAC’s One Portal to access NLAD:
  - Select National Lifeline Accountability Database (NLAD) under the Lifeline section of the dashboard.
Create ETC Administrator

From the 497 Officer Homepage workflow, you can create a new ETC Administrator account or assign it to an existing account:

- Select **497 Officer Home Page** from the Account Management section.
Create ETC Administrator

• Select the **SPIN(s)** you want to assign.
• Select **one** of the options below:
  • Assign to new ETC Administrator,
  • Assign to me, or
  • Assign to existing ETC Administrator.
Create ETC Administrator
New ETC Administrator

- Enter the **email address** for the account you want to set up as the ETC Administrator, and

- Click **Submit**.
Create ETC Administrator

New ETC Administrator

• Enter the **new user’s account information** into the Authorized ETC Administrator Information section:
  • First Name
  • Last Name
  • Phone Number
  • Representative ID

• Enter the **company information** in the ETC Information section
  • Primary Address
  • City, State, and Zip

• Click **Create**.
Create ETC Administrator
New ETC Administrator

• You will receive a confirmation message that the user was successfully added as an ETC Administrator.

• Click **Okay** to return to the 497 Officer Home Page and review the ETC Administrator Entitlements table.
Questions?
Create NLAD Subaccounts
Create NLAD Subaccounts

As the ETC Administrator, log in to USAC’s One Portal to access NLAD:

- Select National Lifeline Accountability Database (NLAD) under the Lifeline section of the dashboard.
Create NLAD Subaccounts

- From the Create Subaccounts workflow, you can create a new NLAD or National Verifier account:
  - Select Create Subaccounts from the Account Management section.
Create NLAD Subaccounts

• Enter in the **email address** for the account you want to set up as a new authorized user, and

• Click **Submit**.
Create NLAD Subaccounts

- Enter the new user information:
  - First Name
  - Last Name
  - Phone Number
  - Representative ID
  - Master Agent (optional)
- Select the user’s role from the drop-down menu:
  - ETC Agent
  - ETC Analyst
  - ETC Operations
- Click **Submit**.
Create NLAD Subaccounts

• You will receive a confirmation message that the subaccount was successfully created.
• Click Okay.
Manage NLAD Subaccounts
Manage NLAD Subaccounts

- As the ETC Administrator, log in to USAC’s **One Portal** to access NLAD:
  - Select **National Lifeline Accountability Database (NLAD)** under the Lifeline section of the dashboard.
Manage NLAD Subaccounts

- From the **Manage Subaccounts** workflow, you can view, update, and deactivate subaccounts:
  - Select **Manage Subaccounts** from the Account Management section.

**Account Management**

Create, manage, and review subaccounts for your SPINs

- 497 Officer Home Page - Review ETC Administrator Accounts and manage SPIN assignments.
- ETC Administrator Home Page - Maintain SAC Information.
- Manage Representative IDs - Link one or more Representatives who have an existing subaccount.
- **Manage Subaccounts** - Review NLAD and National Verifier subaccounts and select accounts to update.
- Create Subaccounts - Create a new NLAD or National Verifier subaccount.
- Create ETC API Account - Create a new NLAD or National Verifier API Account.
- Manage Email Recipients - Assign contacts to receive NLAD-related emails.
Manage NLAD Subaccounts

• Under the Authorized Subaccount section, click the icon to select the account you wish to update or deactivate.
Manage NLAD Subaccounts
Update Subaccount

• Update the subaccount user information:
  • First Name
  • Last Name
  • Phone Number
• Click Update.
Manage NLAD Subaccounts
Deactivate Subaccount (1 of 2)

- Click **Deactivate** to remove the authorized permissions for the subaccount.
Manage NLAD Subaccounts
Deactivate Subaccount (2 of 2)

• You will receive a warning message confirming that you’d like to deactivate the account:
  • Click **Confirm** to deactivate the account, or
  • Click **Cancel** to go back.
Questions?
Resources
Resources

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

- Reports
- User Guide
- API Specifications
- Field Descriptions

Tools & Resources

- Reports - Review reports on Lifeline subscriberhip and activity.
- EBBP/ACP Reports - Review reports on EBBP and ACP subscriberhip 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.
- EBRA API Specification - Learn how to connect to EBRA/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.
- Tutorial Videos - Review information on using NLAD.
Resources

E-File Questions
• Email: customersupport@usac.org
  Phone: (888) 641-8722

NLAD Questions
• Email: LifelineProgram@usac.org
• Subscribe to Lifeline distribution lists:
  • Lifeline Newsletter
  • NLAD Bulletin
Take Our Survey

• We want to hear about your webinar experience.
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