May 2023 Monthly Webinar
NLAD 101: Part Two

May 10, 2023

Universal Service
Administrative Co.

DISCLAIMER

To accommodate all attendees, real-time closed captions will be present during this presentation. 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

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.

Meet Our Team

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.

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

Tribal Waiver Extension Expired

- On January 30, 2023, WCB released a limited waiver to provide relief for Tribal subscribers impacted by the COVID-19 pandemic. This waiver expired on Sunday, April 30, 2023.

- As of Monday, May 1, 2023, Tribal Lifeline subscribers are required to complete recertification and reverification. USAC has started outreach to consumers.

Tribal Waiver Extension Expired (Cont.)

Service Provider Role

- To support consumers in preparing to resume the requirements of recertification and reverification, service providers should:

  - Reference the "Recertification Subscriber Status Report" in the National Lifeline Accountability Database (NLAD) to see which subscribers passed recertification during the automated check.
  - Monitor the "Recertification Subscriber Status Report" regularly to identify subscribers undergoing recertification
  - Educate subscribers about who USAC is, why we are reaching out to them, and our recertification process.
  - Avoid providing or estimating deadlines, as these are subject to change.

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.
- Starting Monday, May 1, 2023, USAC will initiate 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 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.

Recertification

What This Means for Subscribers

- Starting in May, USAC will conduct outreach to subscribers who fail the automated eligibility checks. Subscribers will have an approximately 60-day window 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.

National Lifeline Accountability Database (NLAD) Overview

NLAD Overview

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.

NLAD Overview

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 that subscriber to the service provider's NLAD subscriber records.
- **Transfer:** Moves an existing Lifeline subscriber from their current service provider in NLAD to another service provider. The second provider performs the transfer transaction in NLAD.
- **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 from NLAD who is no longer eligible to receive the Lifeline benefit.

NLAD Overview

Subscriber Consent

- According to the Code of Federal Regulation (47 CFR § 54.404(b)(9)), all eligible telecommunications carriers must:
  - Describe to the subscriber the specific information being transmitted using clear language.
  - Obtain consent to transmit the subscriber's information from each new and existing subscriber.

Note: ETCs must obtain consent before enrolling and transferring subscribers. Failure to provide consent will result in the subscriber being denied the Lifeline service.

NLAD Overview

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.

Performing Transactions

Performing Transactions

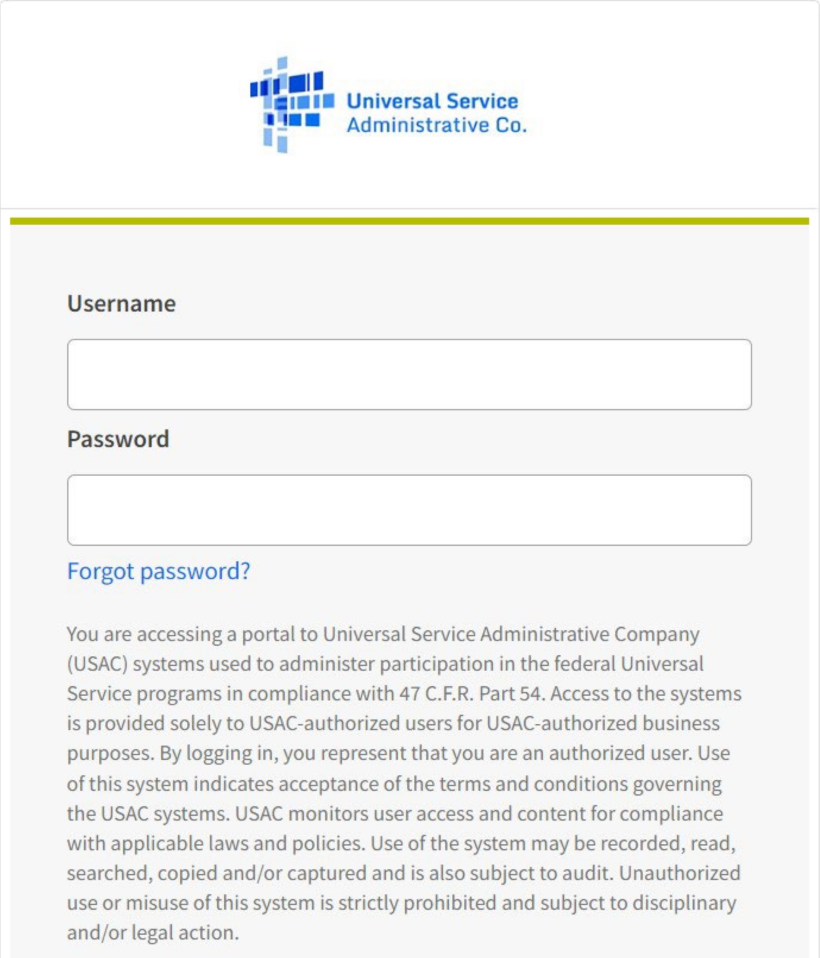
- An ETC can perform transfer, update, and enroll transactions in NLAD using:
  - **Manual Upload**: Add or update one subscriber at a time
  - **Bulk Upload:** Add or update many subscribers at once by using the National Verifier NLAD Input Template
    - Download the CSV file, add data, and upload the file to NLAD
    - Bulk Upload Instructional video
  - **NLAD API:** Add or update subscribers via an automated process

Transfer Subscriber

Transfer Subscriber

Sign In- Step 1

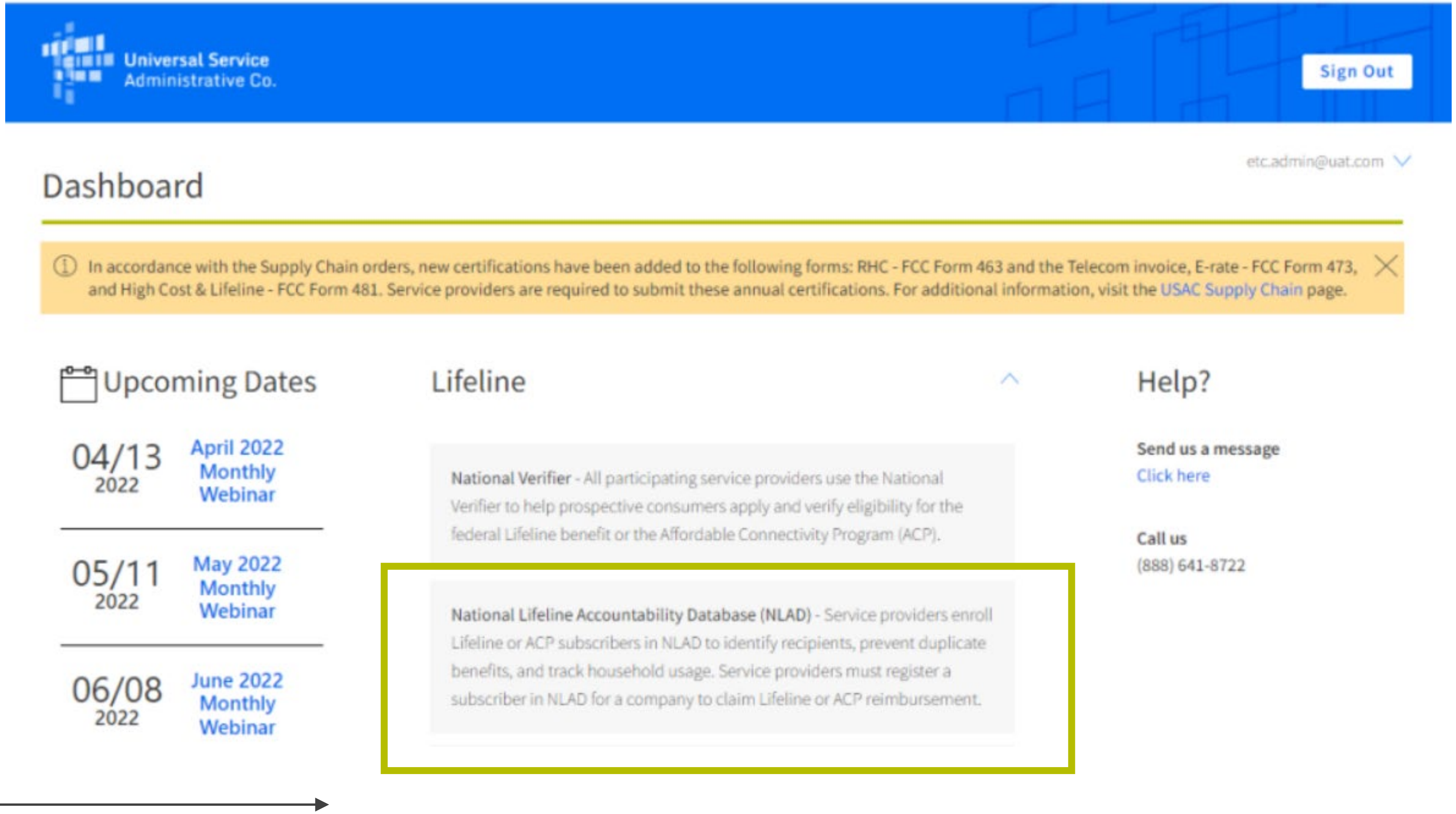
- Access NLAD through [One Portal]



Transfer Subscriber

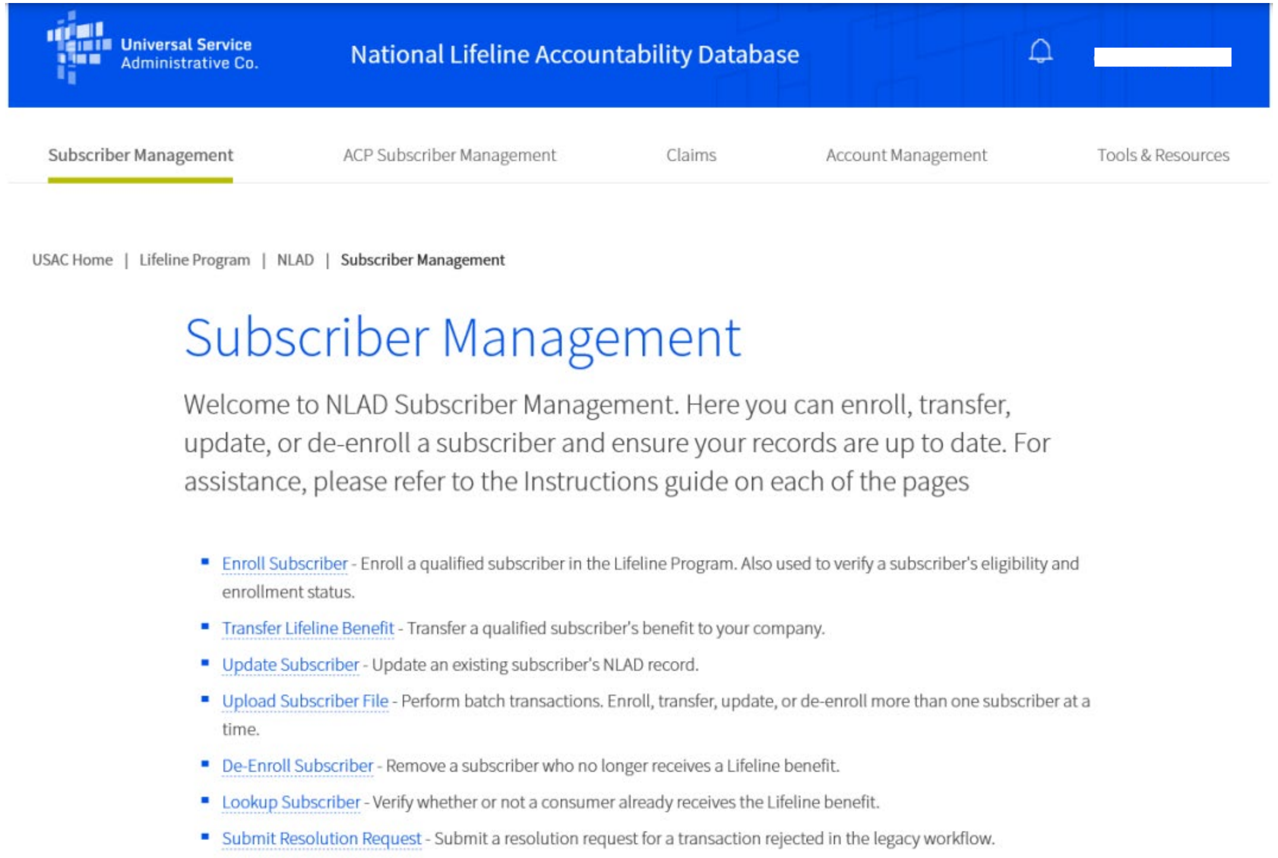
Sign In- Step 2

- After logging into One Portal, you will arrive on the homepage.
  - The home page will differ depending on the user's assigned role in NLAD
- Locate NLAD



Transfer Subscriber
Subscriber Management

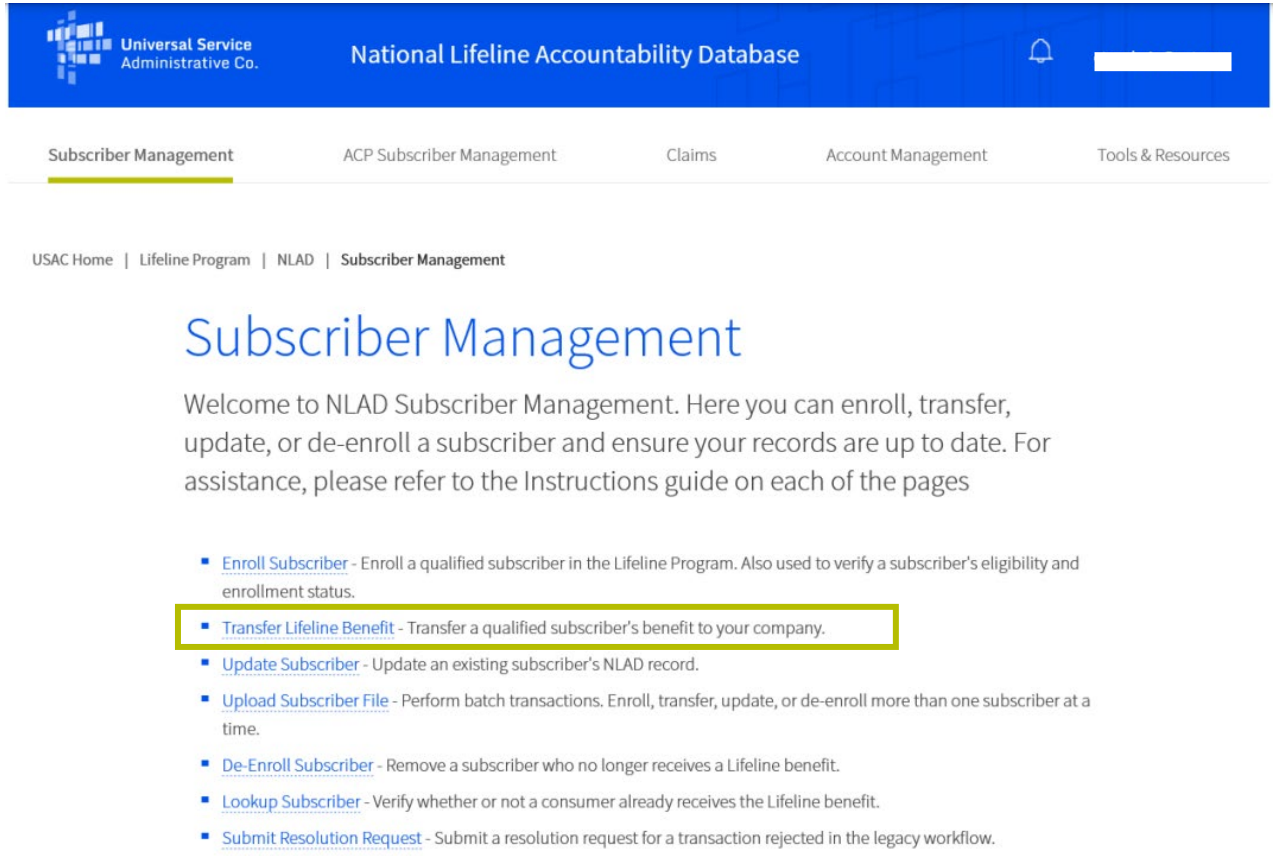
- Select **Subscriber Management** to see the types of transactions your user role can perform.



Transfer Subscriber

Transfer Subscriber

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



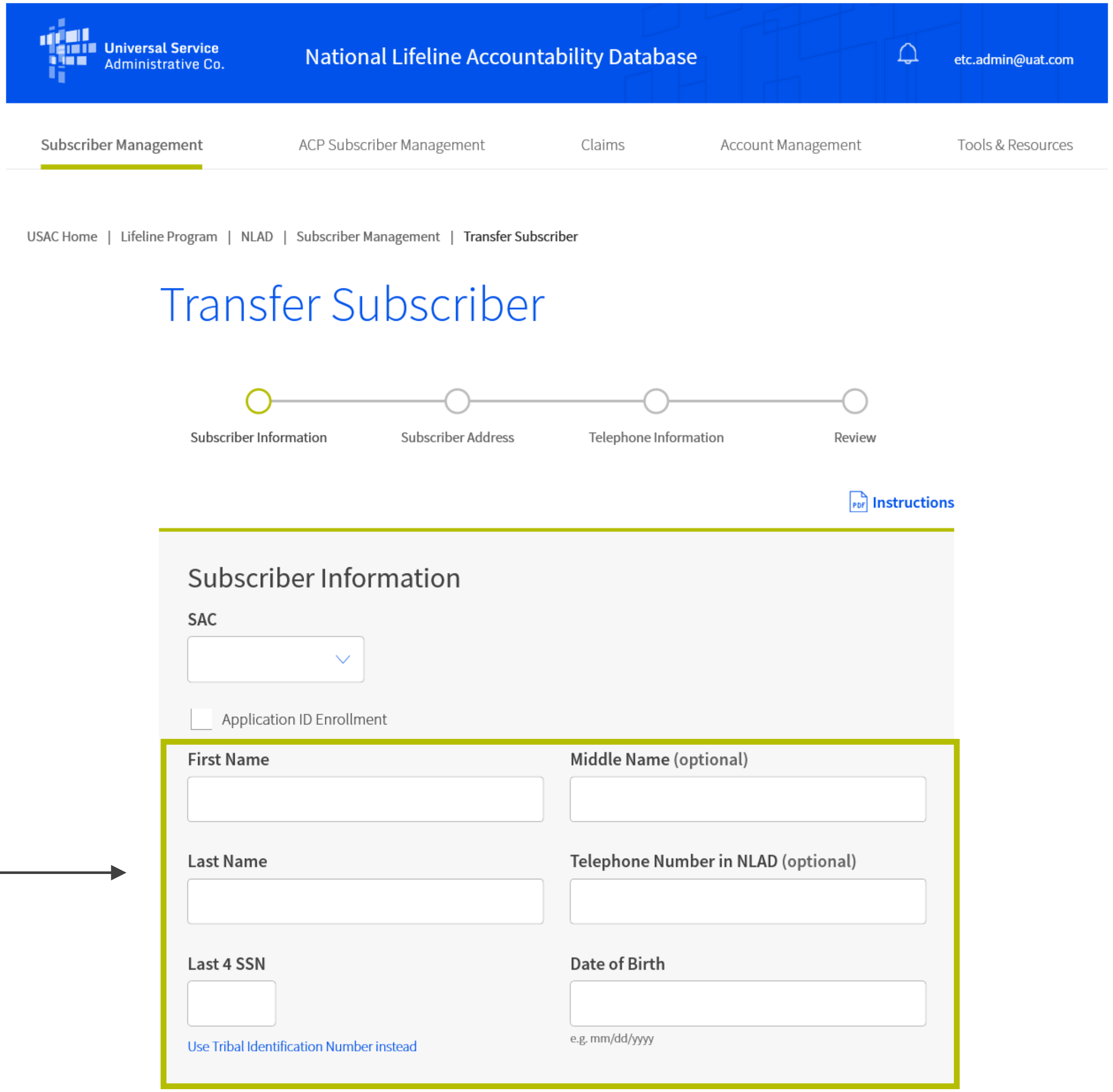
Transfer Subscriber

Subscriber Information

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

Option 1

- Fill in the consumer's information to include:
  - First name
  - Last name
  - Date of birth
  - SSN4 or Tribal ID - if applicable
  - Address

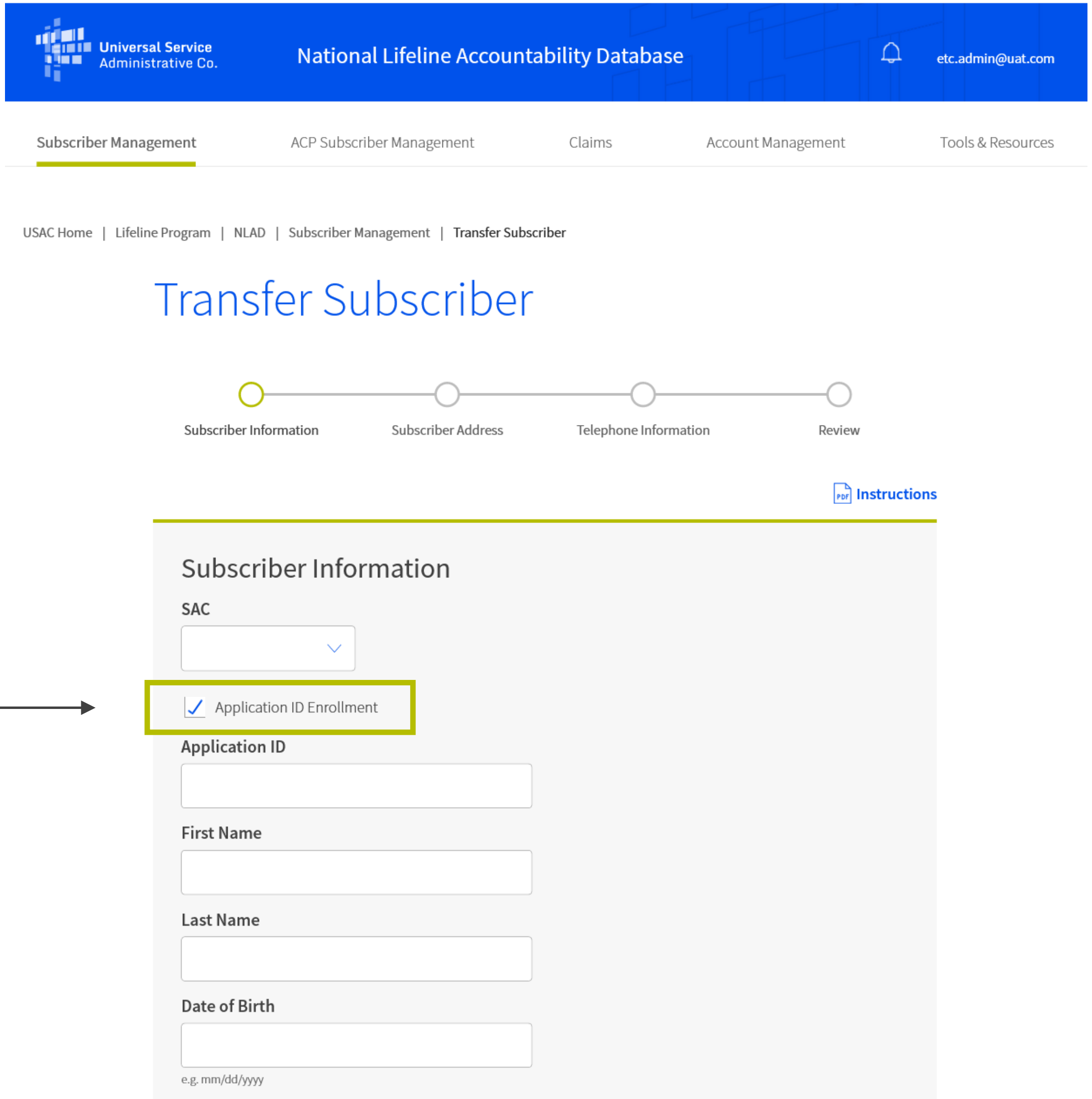


Transfer Subscriber

Subscriber Information

Option 2

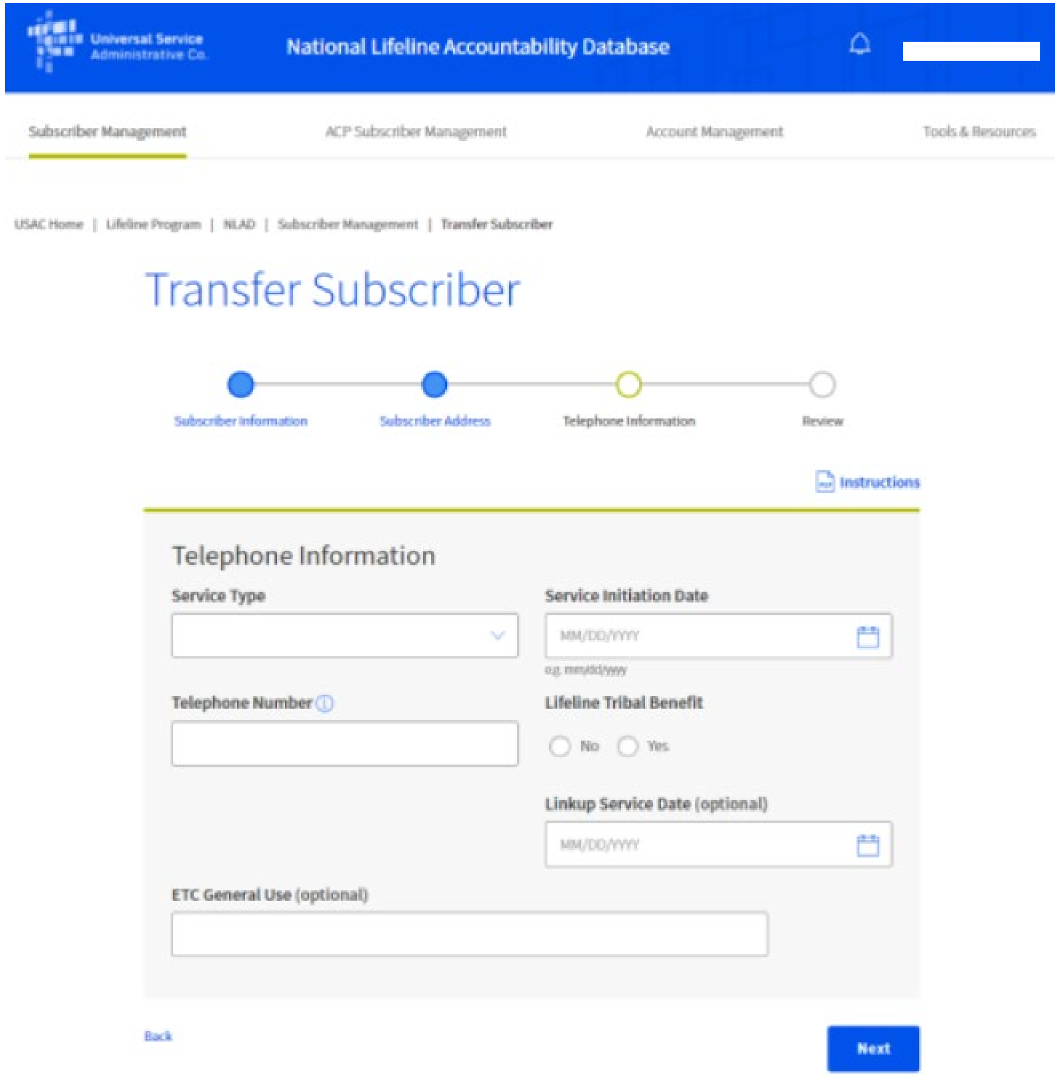
- Select the checkbox "Application ID Enrollment" and fill in the following fields:
    - First name
    - Last name
    - Date of birth
    - Application ID



Transfer Subscriber

Service Information (1 of 2)

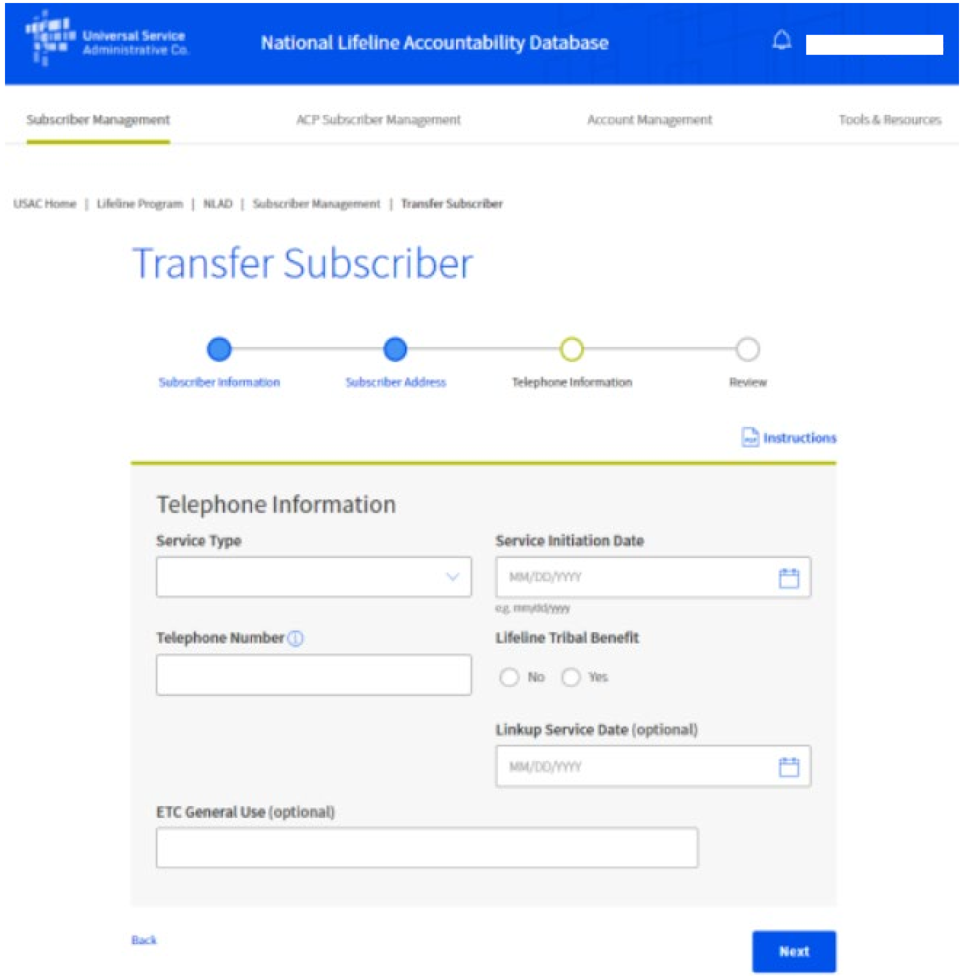
- Enter in the consumer's service information:
  - **Service Type:** Subscriber's Lifeline service offering: Voice, broadband, bundled-voice, bundled-broadband, bundled-voice, and broadband
  - **Service Initiation Date:** Date the service provider-initiated Lifeline service
  - **Telephone Number:**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



Transfer Subscriber

Service Information (2 of 2)

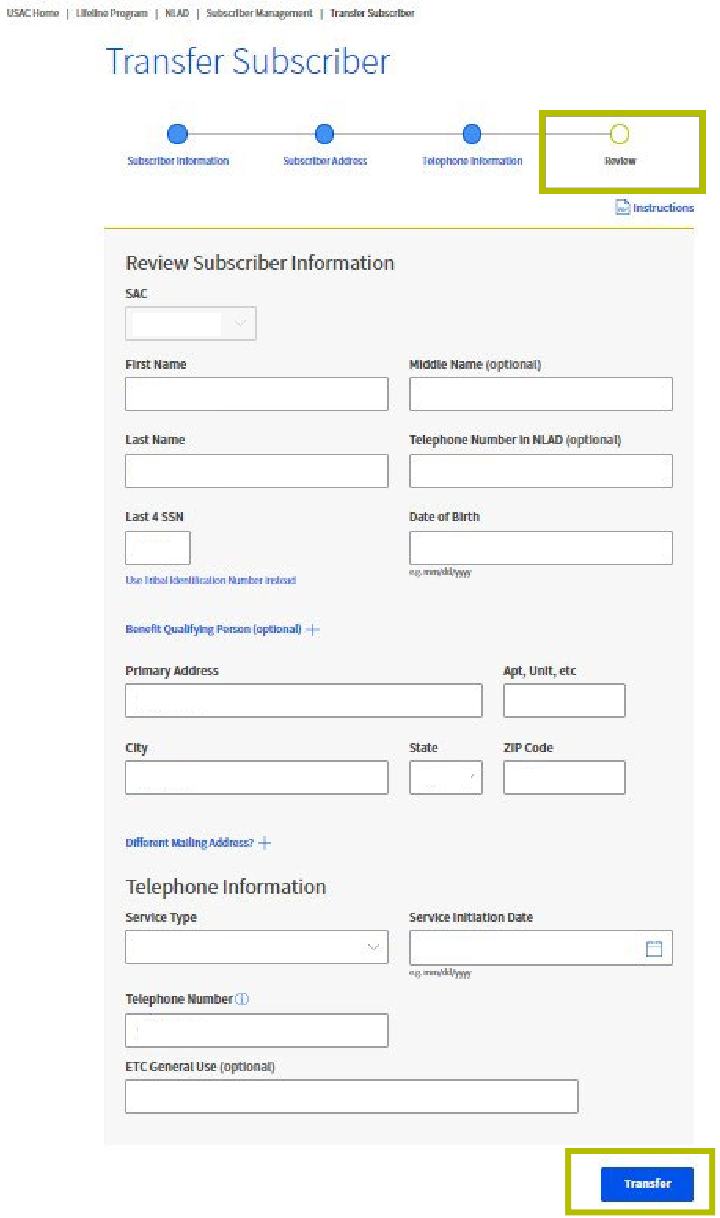
- **Lifeline Tribal Benefit**: Required field to claim Lifeline Tribal support for a qualified subscriber; this field will not appear if the subscriber's address falls on non-Tribal lands
- **Linkup Service Date**: Date of Linkup Service (mm/dd/yyyy format)
- **ETC General:** Optional field that some 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 Lifeline Benefit

You have successfully transferred the Lifeline Benefit.

Subscriber ID:

SAC

First Name

Last Name

Last 4 SSN

Date of Birth

Primary Address

City

State

ZIP Code

Telephone Information

Service Type

Broadband

Service Initiation Date

02/01/2022

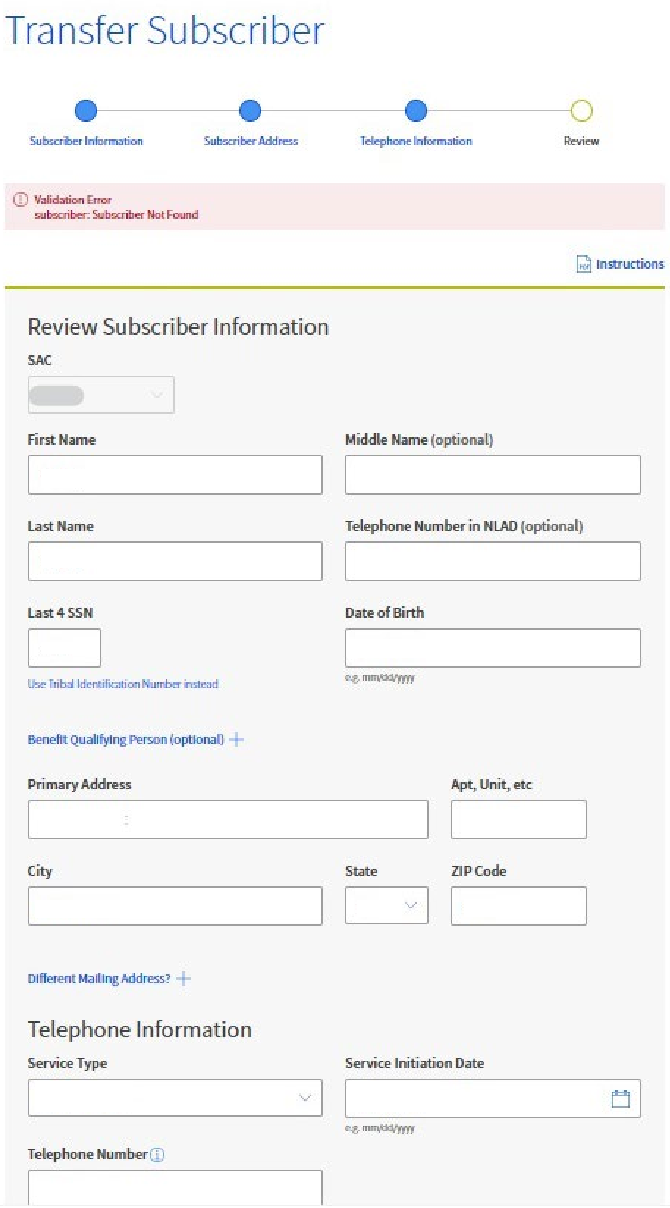
Telephone Number

ETC General Use

Transfer Subscriber

Unsuccessful Transfer

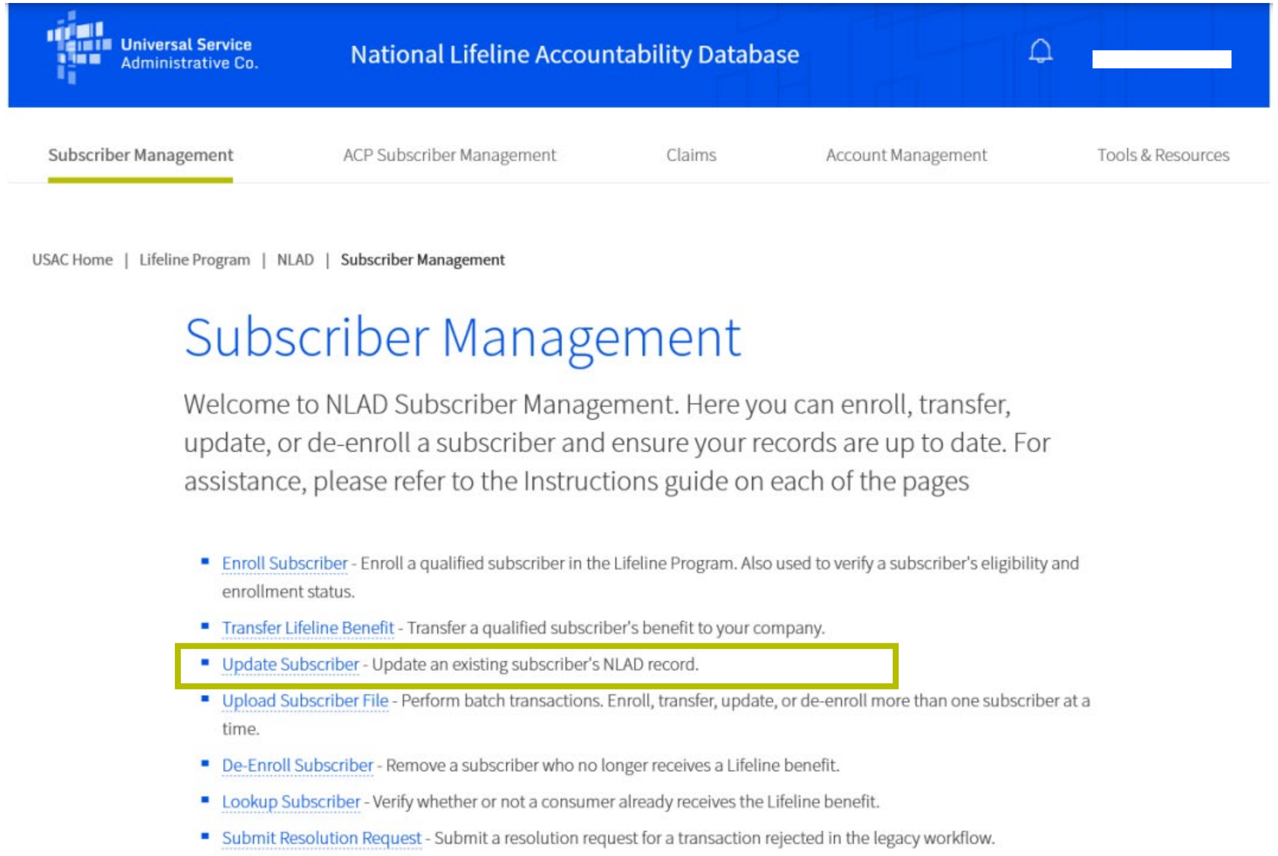
- If a transfer is not successful because of missing or incorrectly formatted data, the associated error messages will display at the top of the page in red.
    - You will be redirected to the **Transaction Unsuccessful** page, where you will see the related error messages, as well as the transaction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



Update Subscriber

Update Subscriber

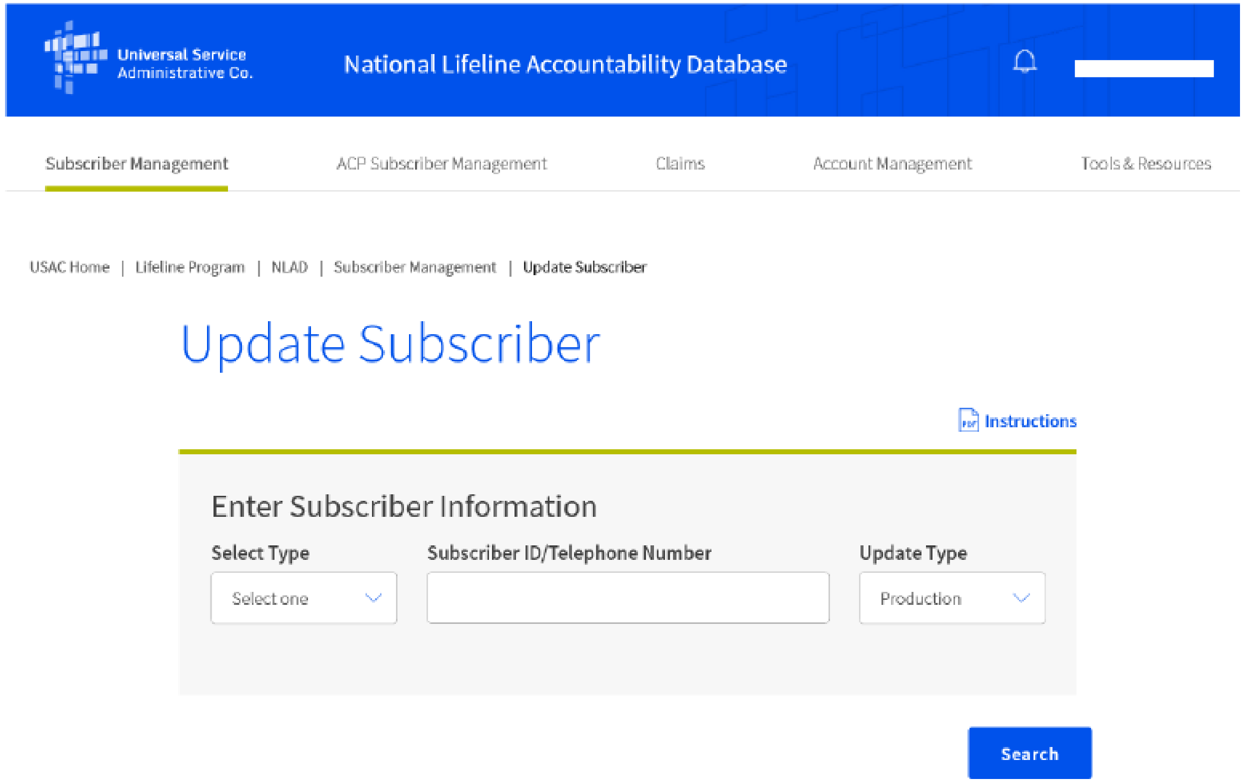
- From the **Update Subscriber** workflow, you can search for a subscriber using their phone number or Subscriber ID, edit available data, and submit changes to the subscriber's record.



Update Subscriber

Enter Subscriber Information

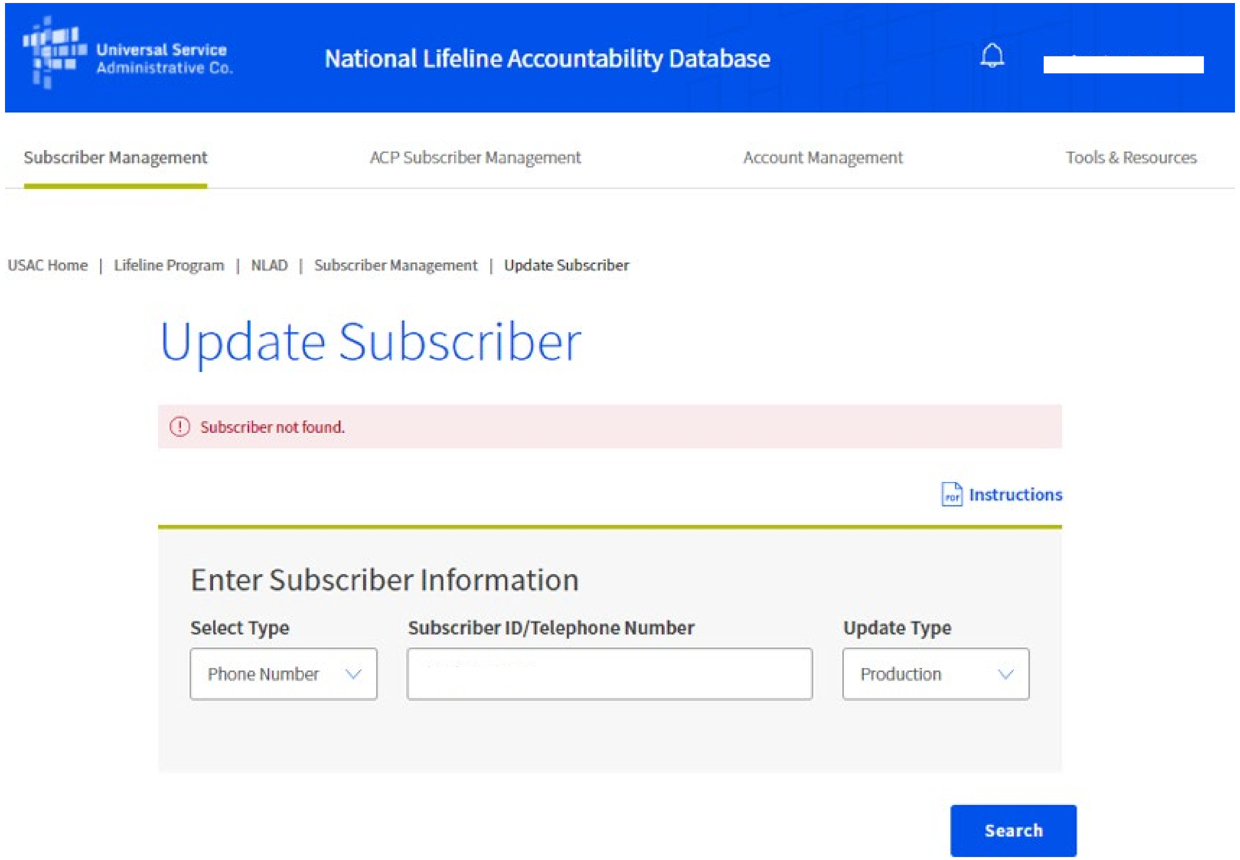
- **Select Type:** Search by Subscriber ID or Phone Number.
    - If Phone Number is selected, enter in the subscriber’s Phone Number
    - If Subscriber ID is selected, enter in the subscriber ID
- **Update Type:** Select **Production** to search for an active subscriber.



Update Subscriber

Subscriber Not Found

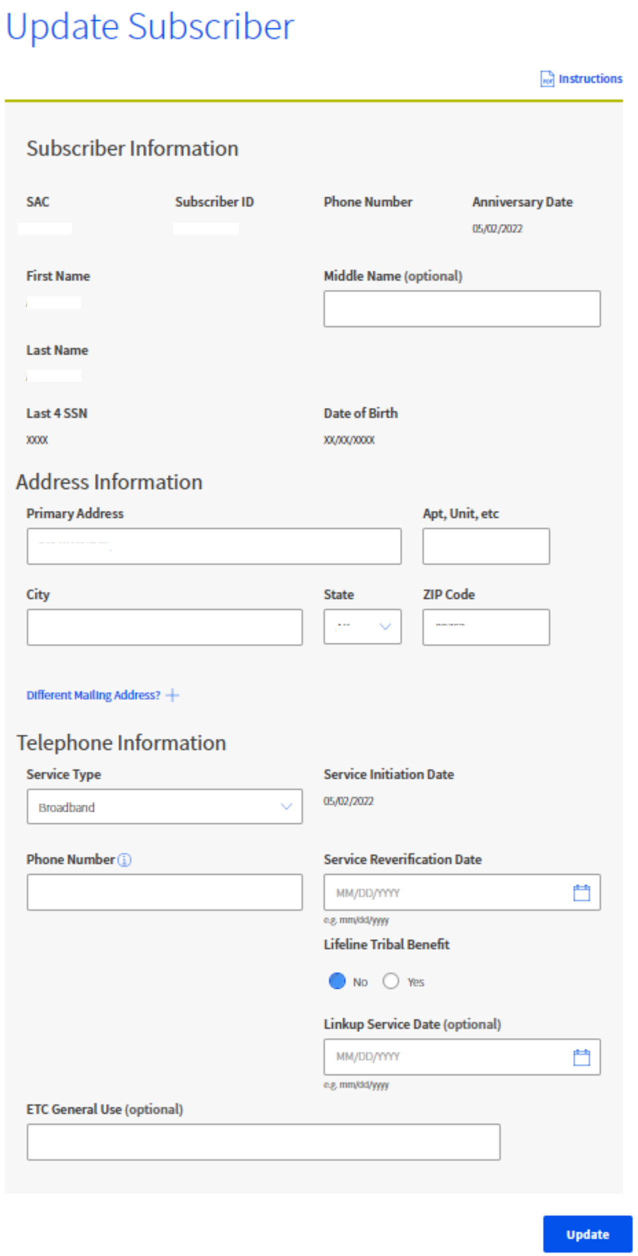
- If a match is not found, you will receive a **Subscriber Not Found** error message.



Update Subscriber

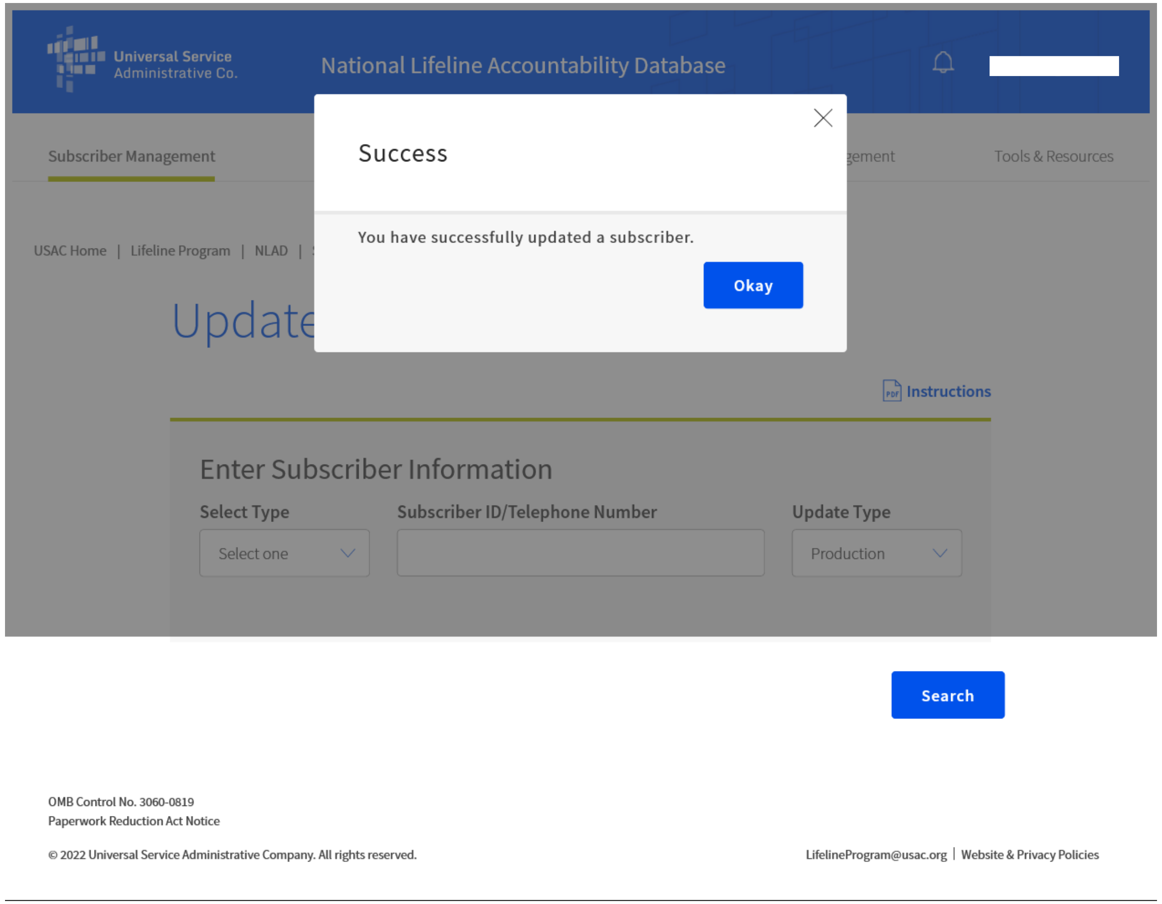
Edit Subscriber Record

- 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.

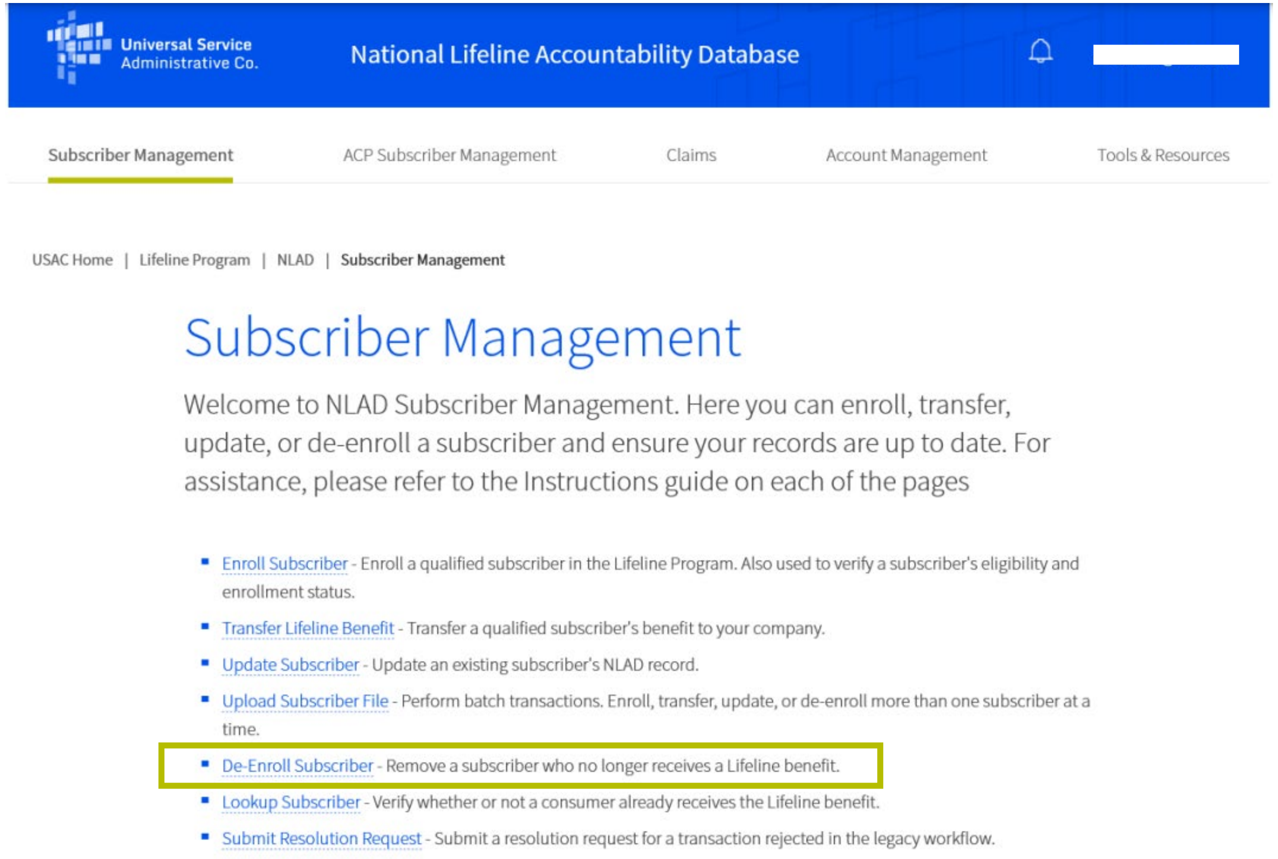


Questions?

De-Enroll Subscriber

De-Enroll Subscriber

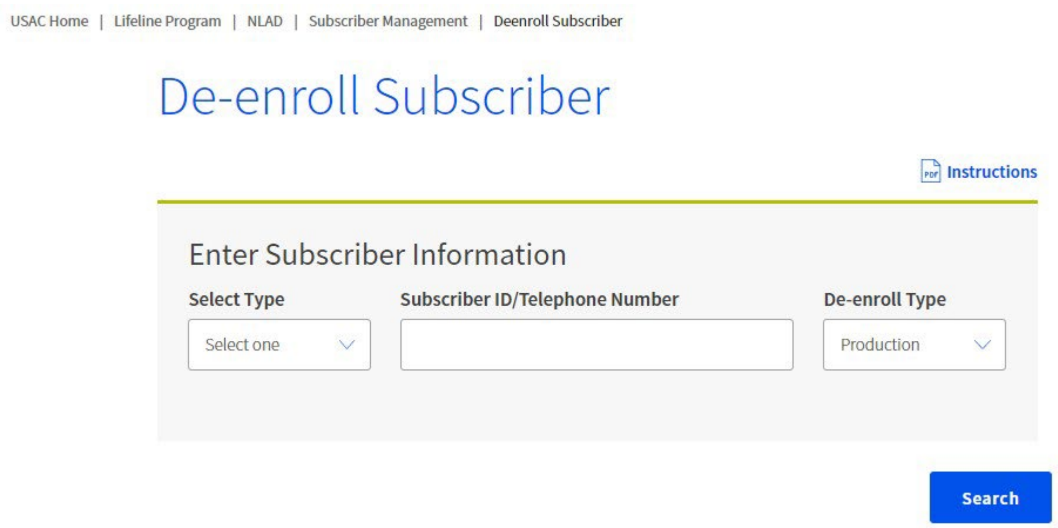
- From the **De-Enroll Subscriber** workflow, you can de-enroll a subscriber who is no longer eligible to receive Lifeline from NLAD.



De-Enroll Subscriber

Enter Subscriber Information

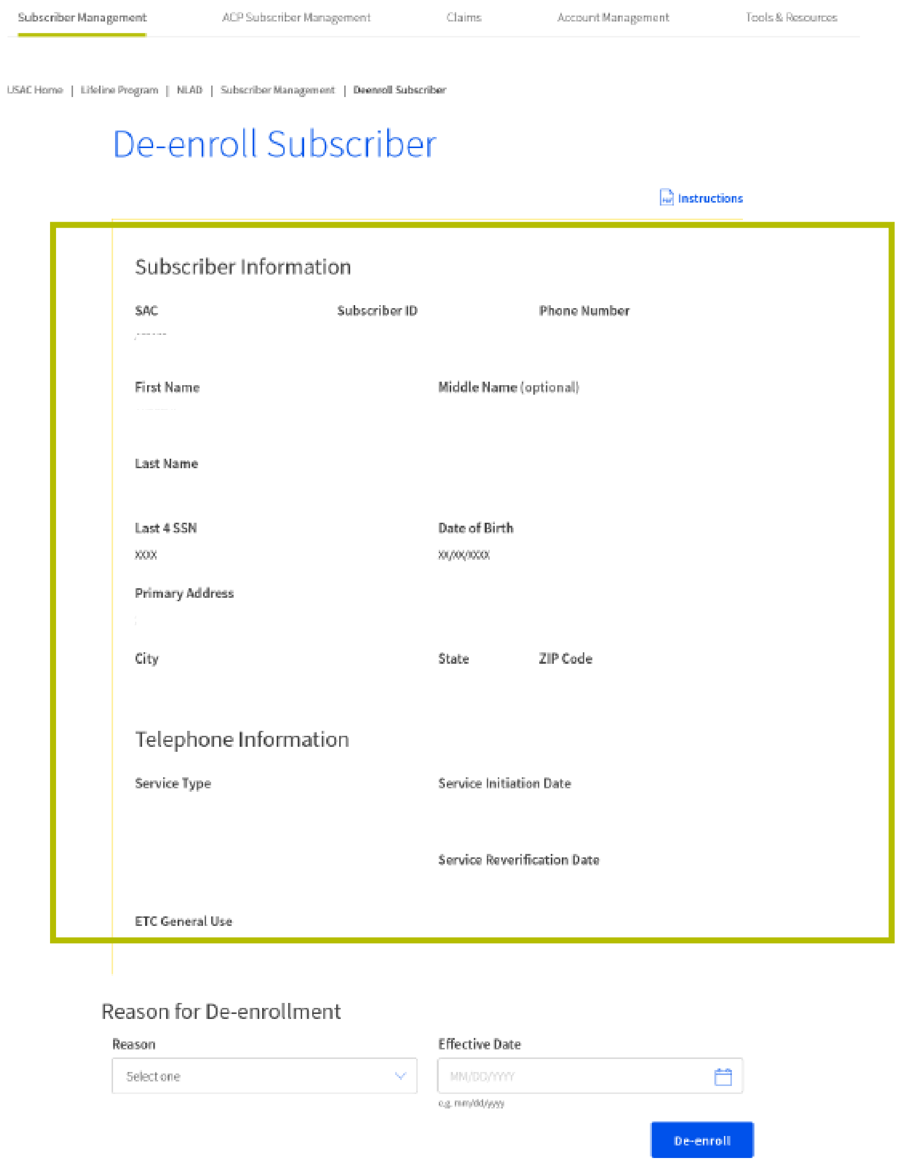
- **Select Type:** Search by Subscriber ID or Phone Number.
  - If Phone Number is selected, enter in the subscriber's Phone Number
  - If Subscriber ID is selected, enter in the subscriber ID
- **De-Enroll Type:** Select **Production** to search for an active subscriber.



De-Enroll Subscriber

Verify Subscriber Information

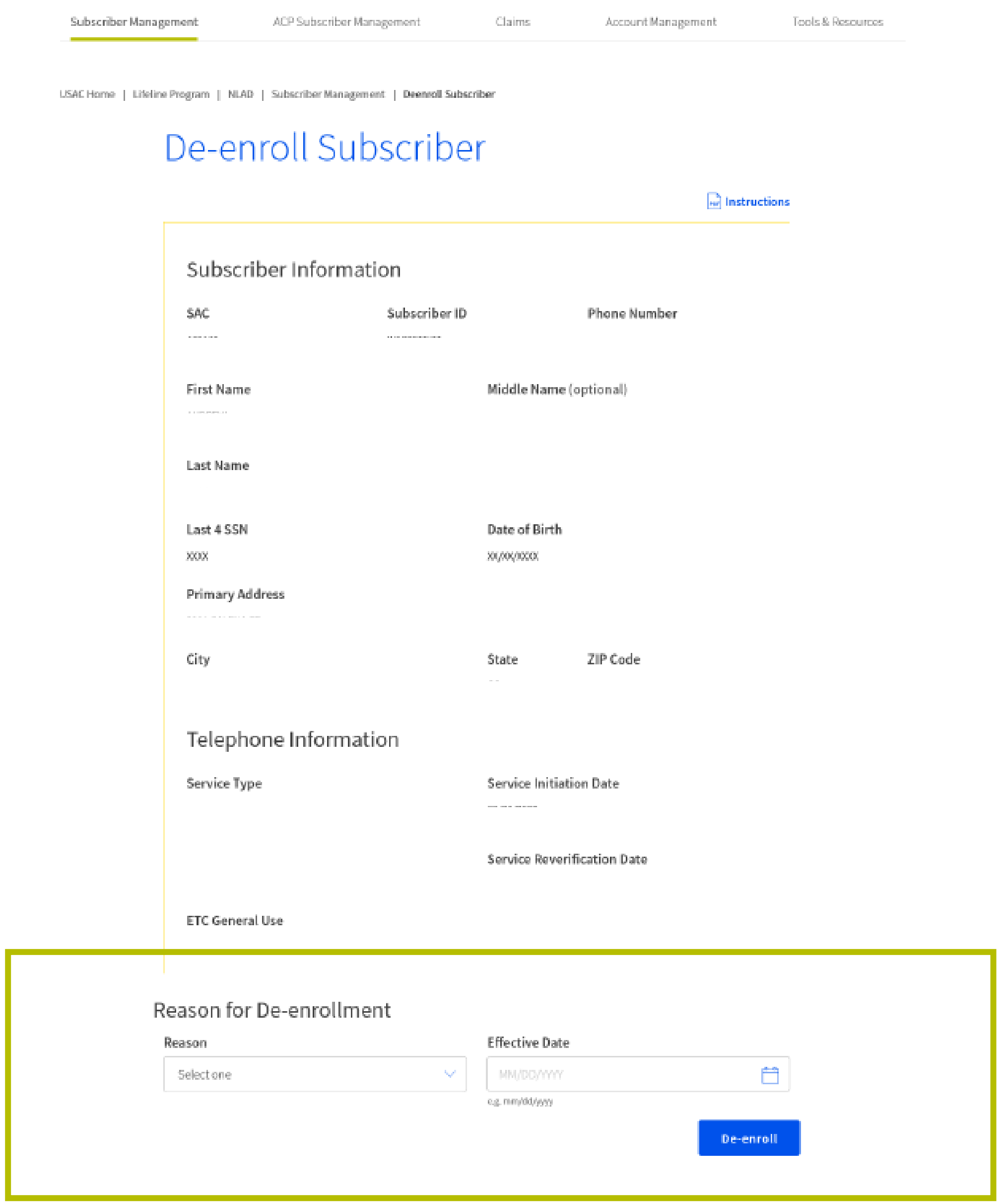
- If a matching subscriber is found, the subscriber's personal information will be displayed for your review.
- **Verify** the subscriber's record returned is the correct subscriber.



De-Enroll Subscriber

Verify Subscriber Information

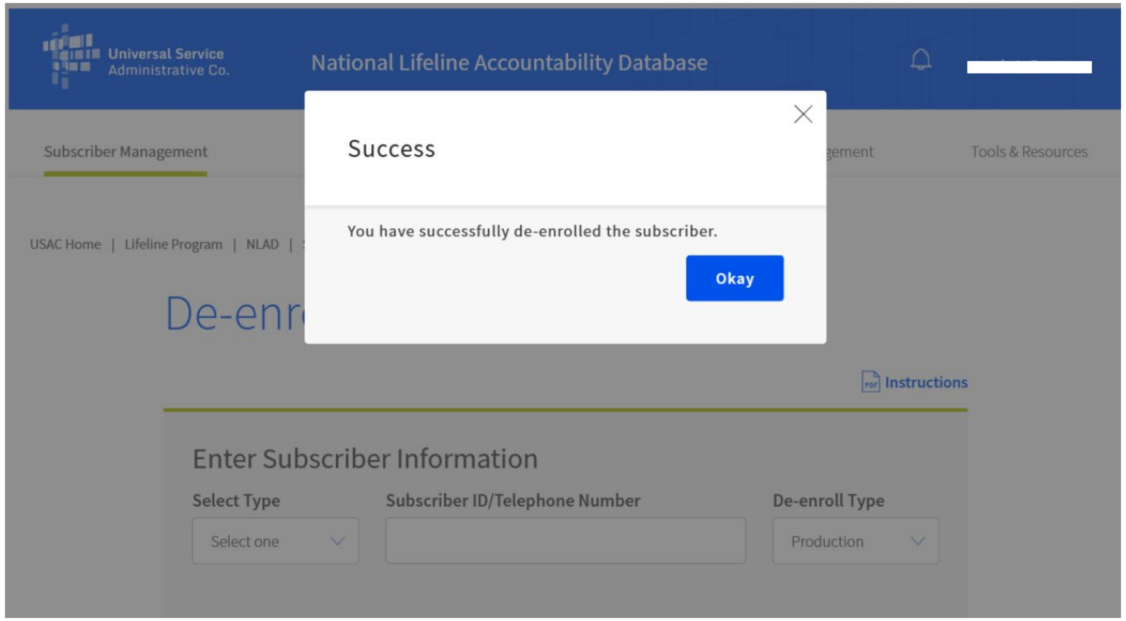
- Select the de-enrollment reason.
  - Subscriber is deceased
  - Subscriber is leaving the program
  - Subscriber failed to recertify
  - Subscriber non-usage
- Select the effective date .
  - Date that the de-enrollment of the subscriber occurs with the service provider and marks the last day of the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



De-Enroll Subscriber

Verify Subscriber Information

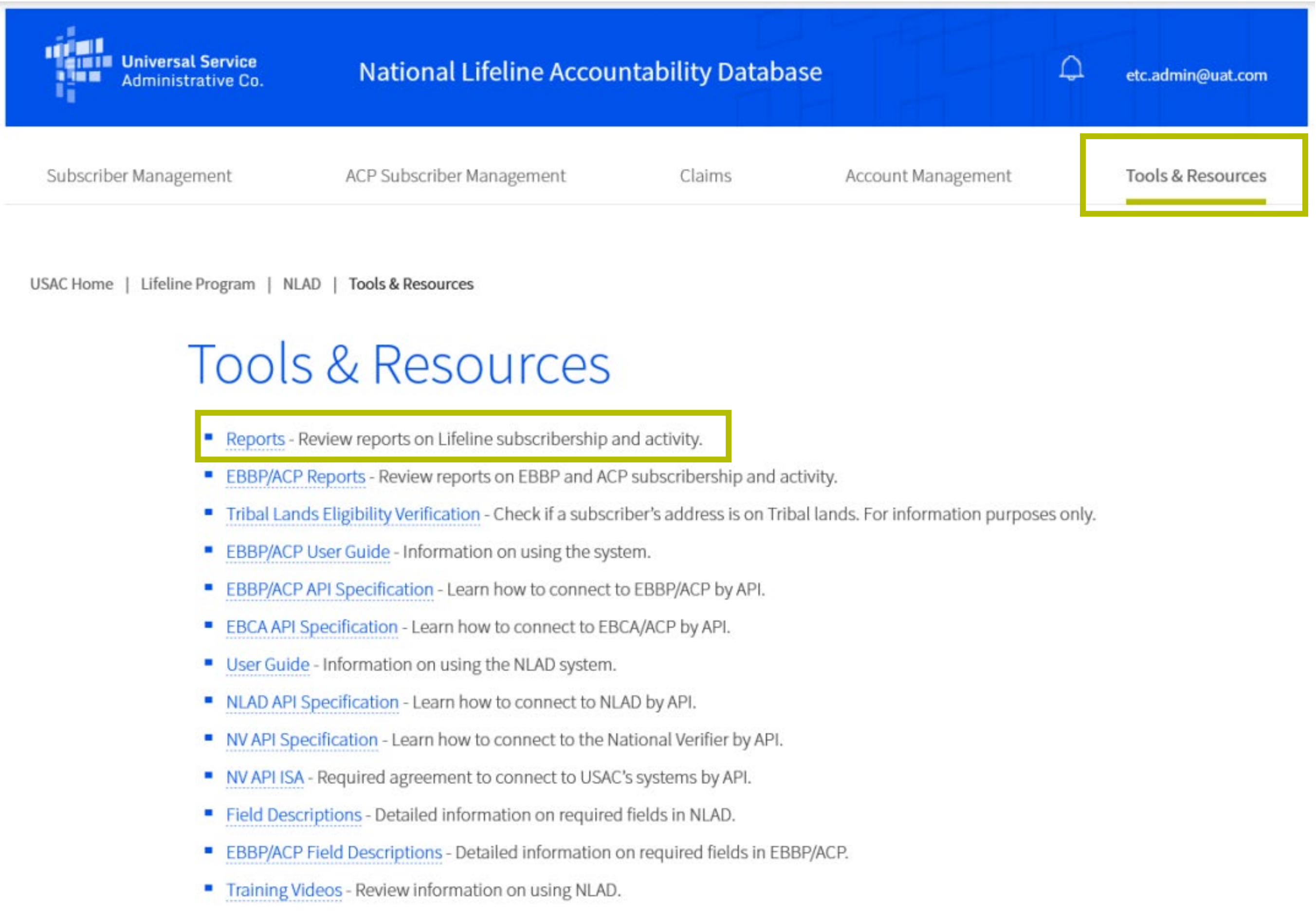
- Upon successful de-enrollment, you will receive confirmation that the subscriber was de-enrolled.



Reports

Reports

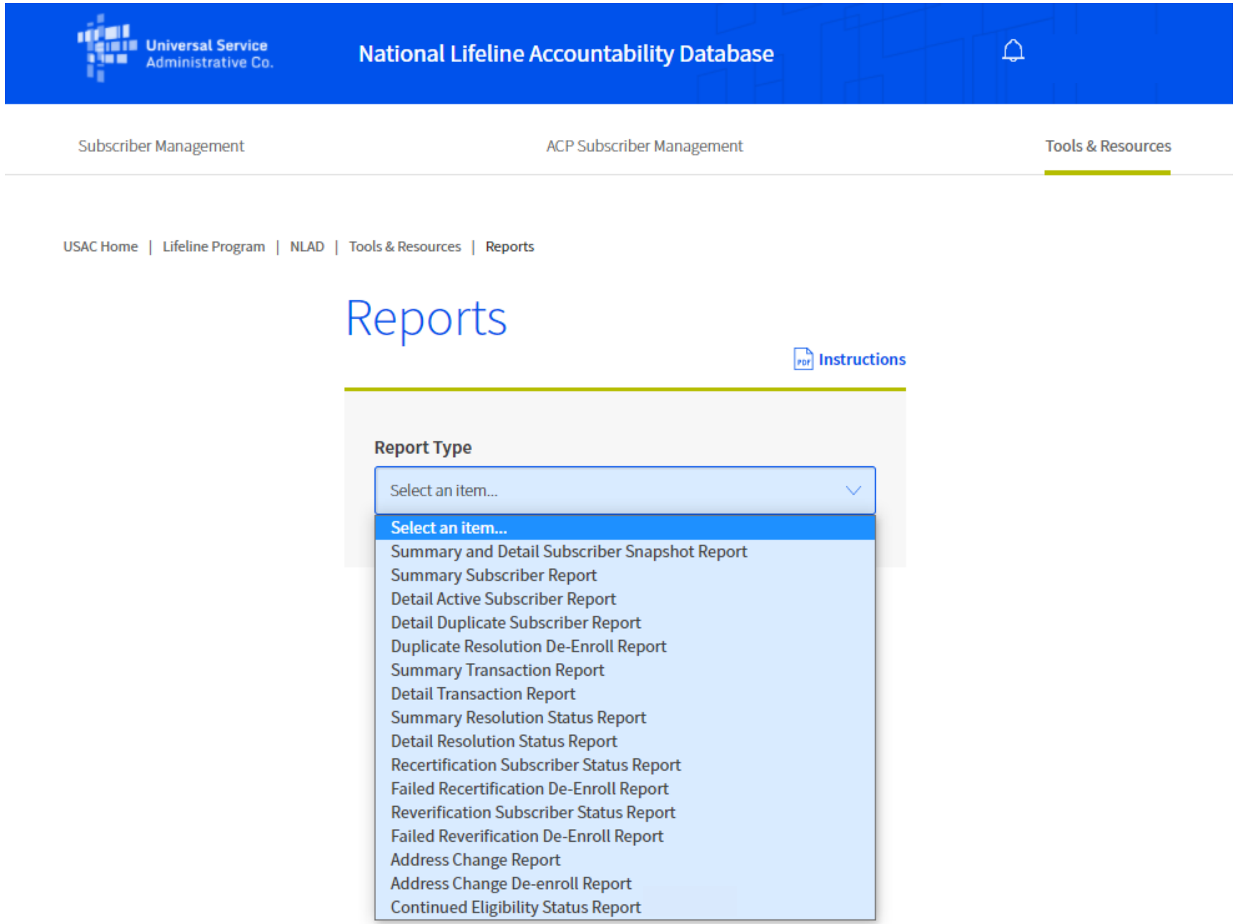
- From the **Tools and Resources** section select **Reports** to view information on Lifeline subscribers and activity.



Reports

Types of Reports

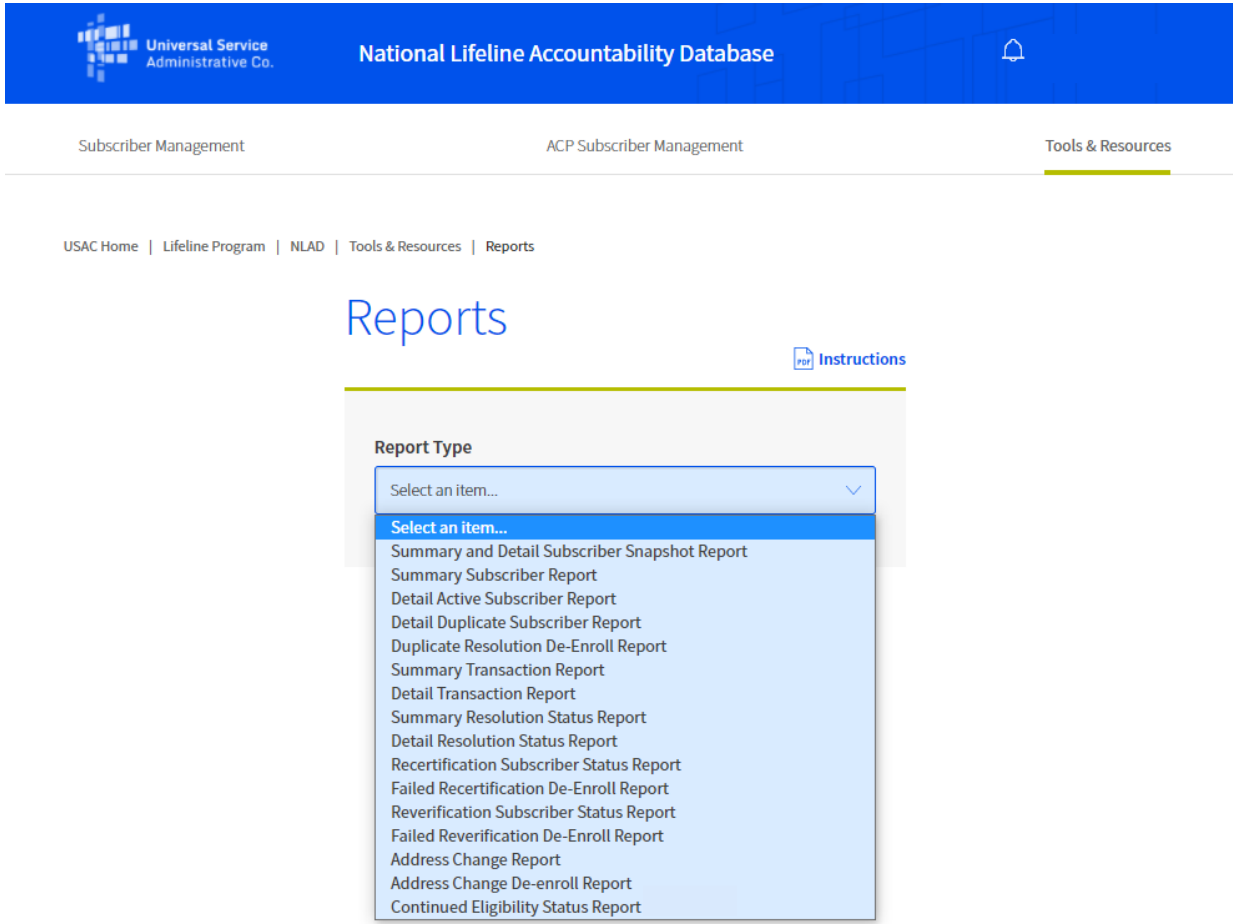
- From the **Reports** workflow, select the type of report you'd like to review.
  - **Summary Reports**: Provide counts of records that fall within the specified parameters
  - **Detail Reports**: Return the full records along with other relevant reporting fields
- Report data is limited to the SACs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



Reports

Report Criteria

- 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 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

Instructions

Report Type

Summary and Detail Subscriber Snapshot Report

SAC(s)

Select SAC(s)

Select FCC Form 497 Data Month / Year

Select Month and Year

Submit

Summary Subscriber Snapshot Report

FCC 497 Form Data (Month/Year): March 2022

Displaying 1-1 of 1 records

Instructions

SAC	Non-Tribal Voice	Non-Tribal Broadband	Non-Tribal Bundled	Tribal Voice	Tribal Broadband	Tribal Bundled	Total No. of Subscribers	Detailed Subscriber Snapshot Report
	19	3	16	0	0	0	38	

Show 25 records/page

1 of 1 pages

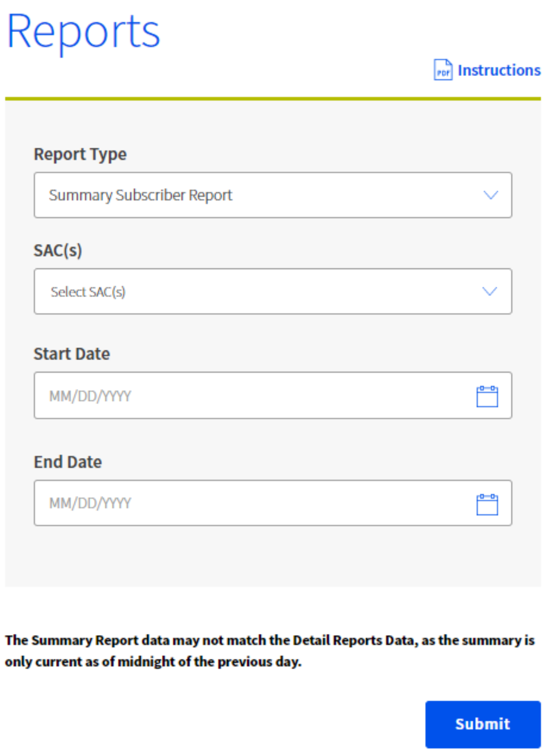
Summary Report

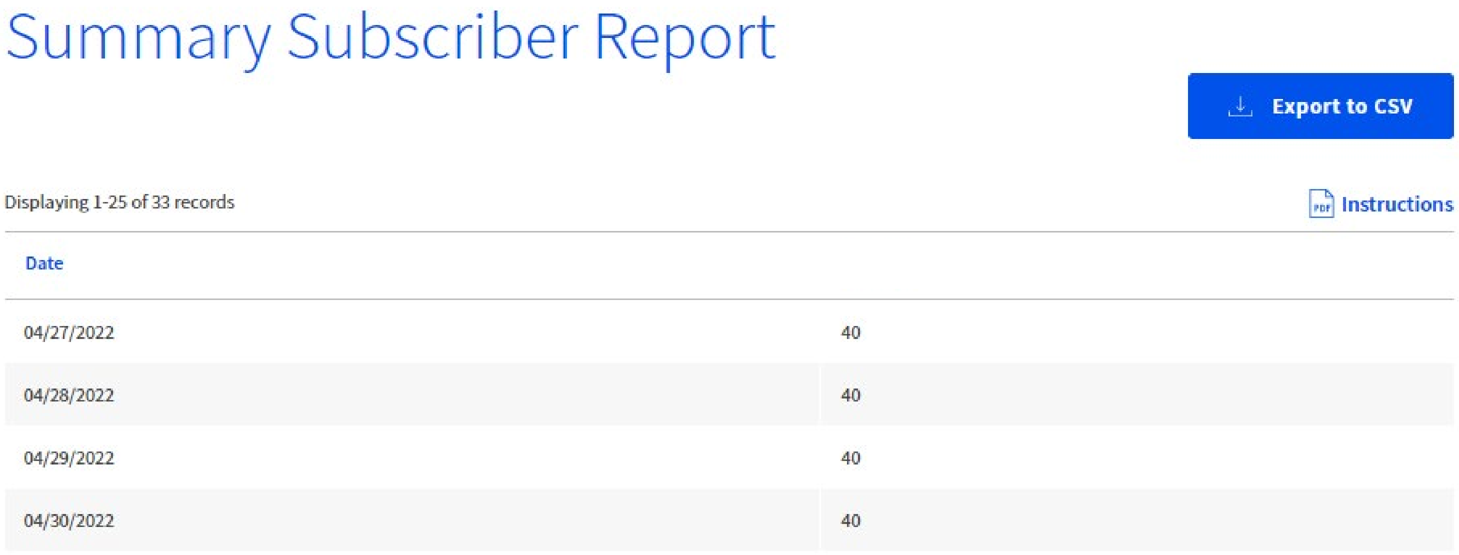
Consolidated Detail Report

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

Instructions

Report Type

Summary Transaction Report

SAC(s)

Start Date

MM/DD/YYYY

e.g. mm/dd/yyyy

End Date

MM/DD/YYYY

e.g. mm/dd/yyyy

Type

Select Type

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

Submit

Summary Transaction Report

Export to CSV

Displaying 1-2 of 2 records

Instructions

Date	SAC	Enroll	Update	Deenroll	Transfer
04/22/2022		1	0	0	0
04/27/2022		1	0	0	0

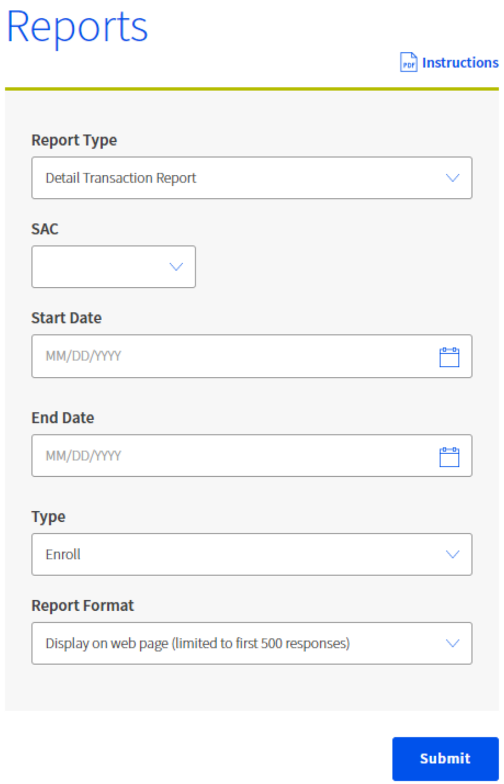
Show 25 records/page

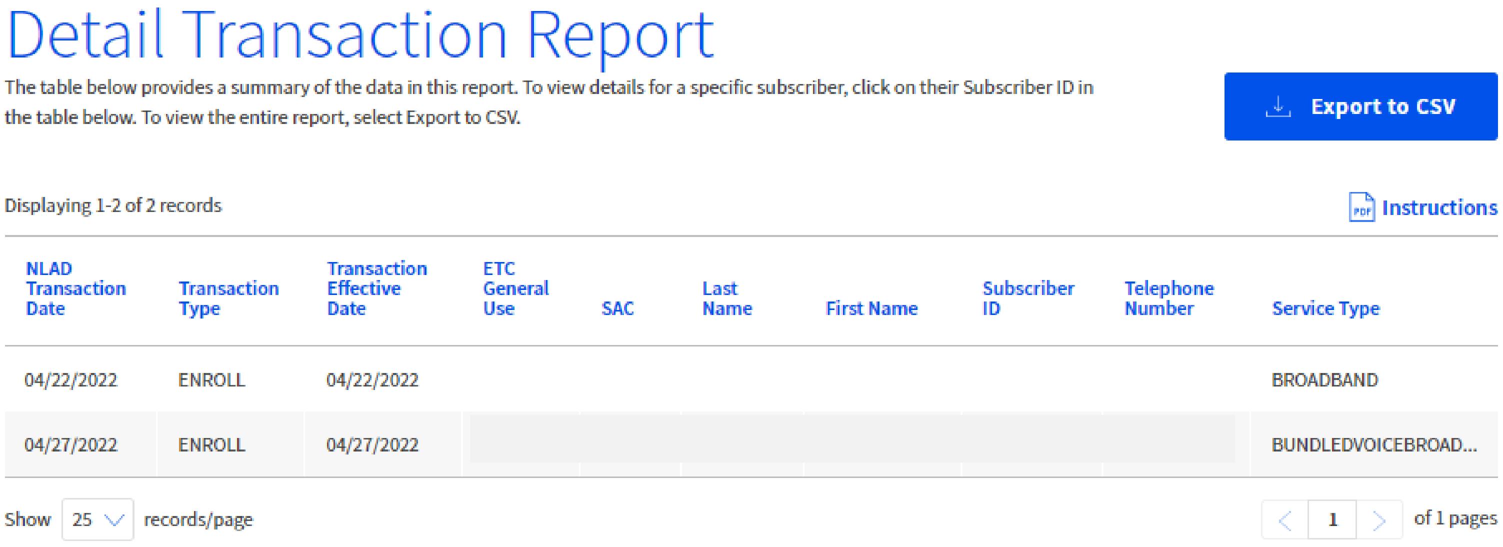
1 of 1 pages

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




Detail Transaction 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 1-2 of 2 records

Instructions

NLAD Transaction Date	Transaction Type	Transaction Effective Date	ETC General Use	SAC	Last Name	First Name	Subscriber ID	Telephone Number	Service Type
04/22/2022	ENROLL	04/22/2022							BROADBAND
04/27/2022	ENROLL	04/27/2022							BUNDLEDVOICEBROAD...

Show 25 records/page

1 of 1 pages

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

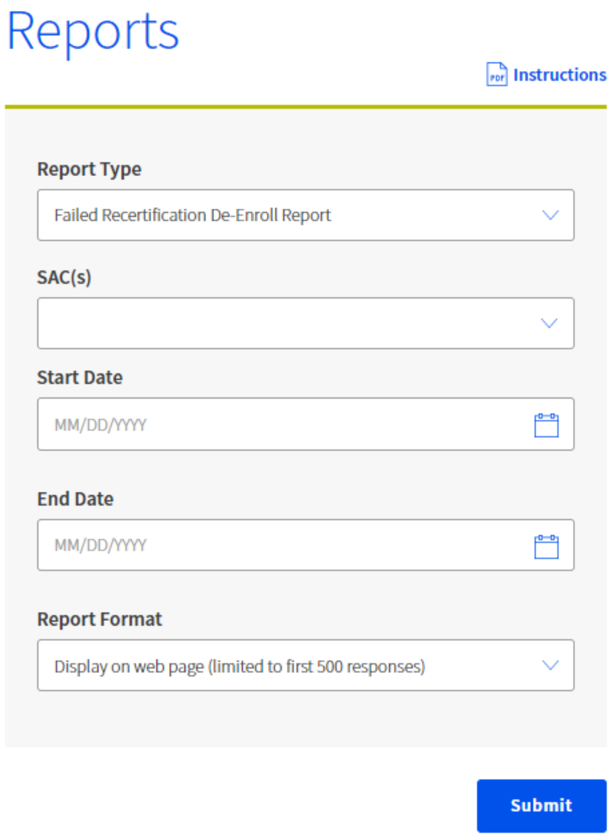
Recertification Status	SAC	Subscriber ID	ETC General Use	Last Name	Sub Recert Deadline	Eligibility Docs Required	Eligibility Docs Accepted	Eligibility Doc Rejection Reason	Address Resolution Required

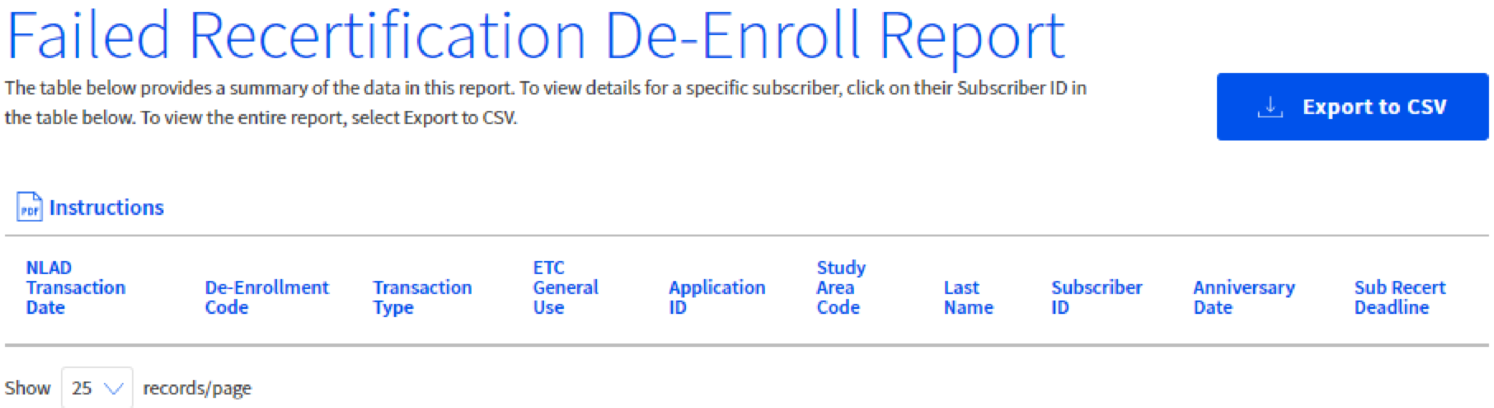
Show 25 records/page

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

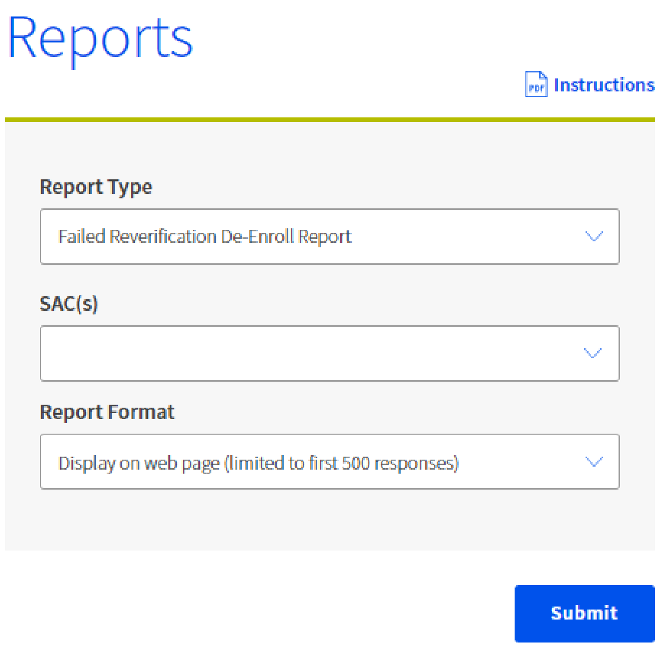
Instructions

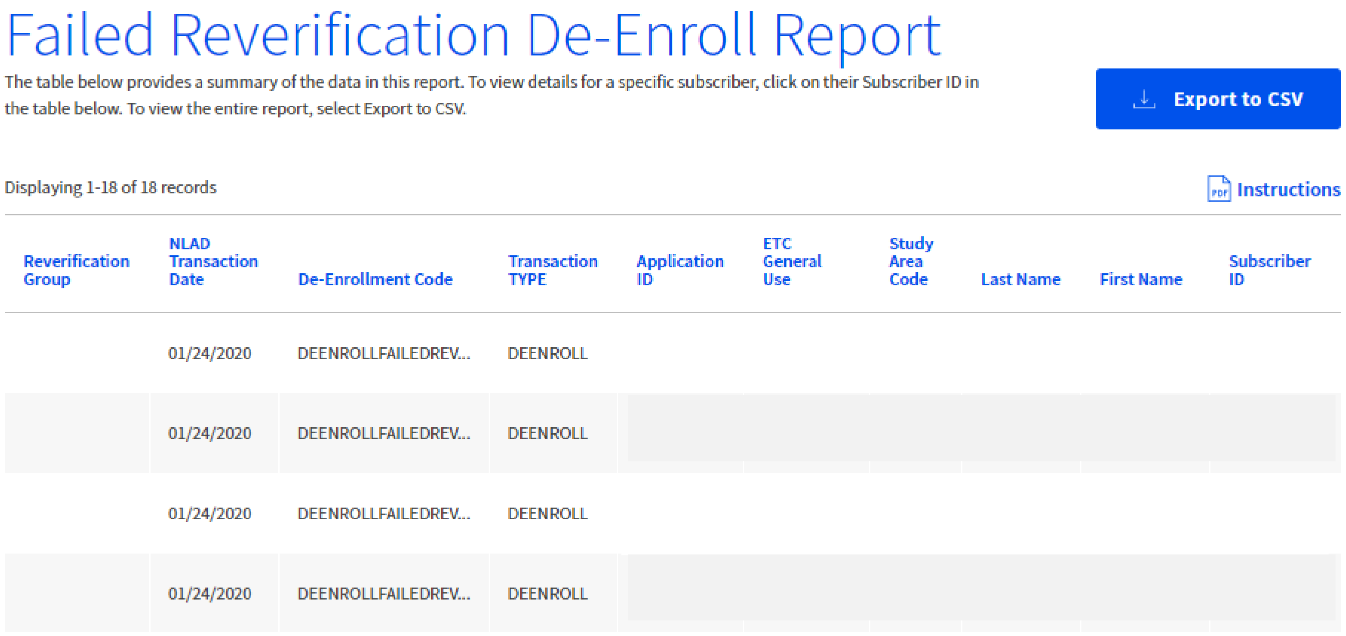
Reverification Group	Application ID	Study Area Code	ETC General Use	Last Name	First Name	Subscriber ID	Last Updated Date	Reverification Check Decision
2	V99308-95630	100002		DYER SR	RODNEY	1UA6E60EF	09/28/2019	PASS
2	V95827-58989	100002		HARRINGTON	MARK	G03AJWF9U	09/29/2019	PASS
2	V92652-49443	100002		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





Failed Reverification De-Enroll 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 1-18 of 18 records

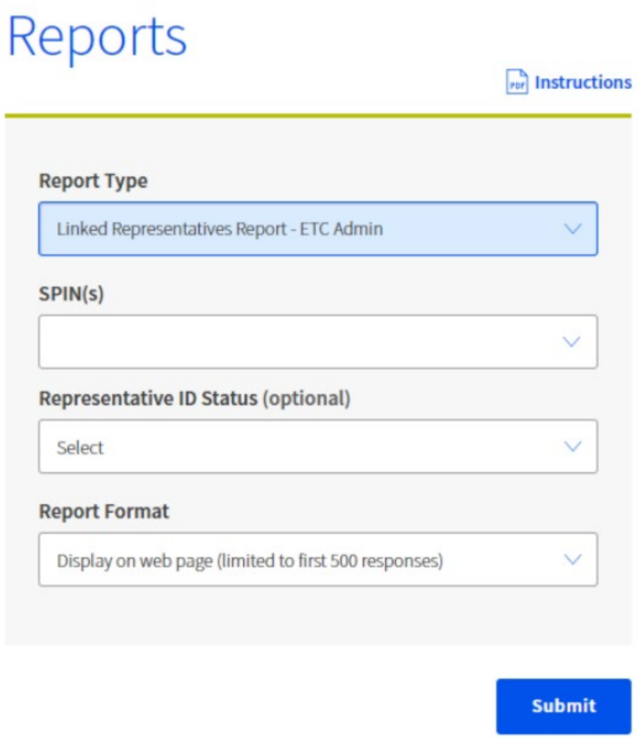
Instructions

Reverification Group	NLAD Transaction Date	De-Enrollment Code	Transaction TYPE	Application ID	ETC General Use	Study Area Code	Last Name	First Name	Subscriber ID
	01/24/2020	DEENROLLFAILEDREV...	DEENROLL						
	01/24/2020	DEENROLLFAILEDREV...	DEENROLL						
	01/24/2020	DEENROLLFAILEDREV...	DEENROLL						
	01/24/2020	DEENROLLFAILEDREV...	DEENROLL						

Reports

Linked Representatives Report – ETC Admin

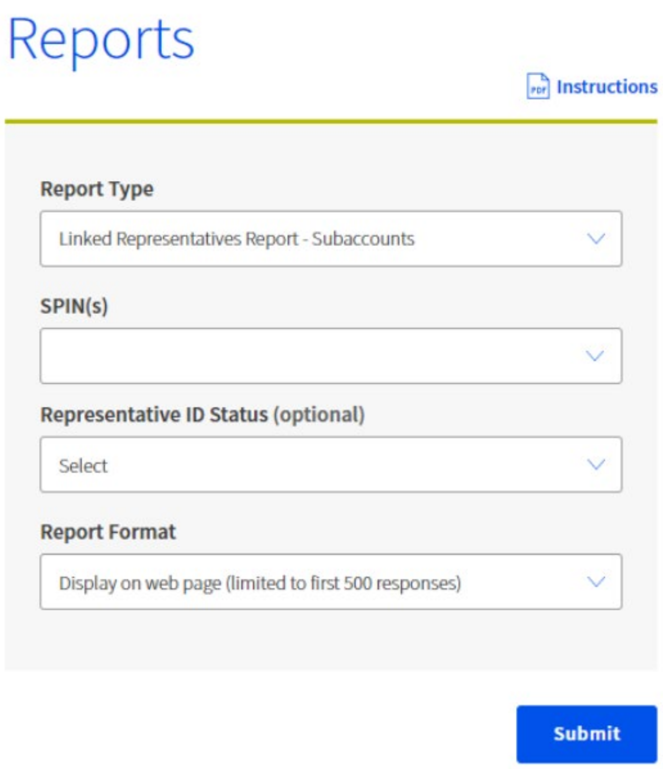
- Shows ETC Administrators that are linked to a particular SPIN
    - This report is only available to 497 Officers.



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

Instructions

Report Type

Linked Representatives Report - Subaccounts

SPIN(s)

Representative ID Status (optional)

Select

Report Format

Display on web page (limited to first 500 responses)

Submit

Linked Representatives Report - Subaccounts

Export to CSV

Displaying 1-1 of 1 records

Instructions

SPIN	Username	First Name	Last Name	Representative ID	Status	Lockout Start Date	Annual Agreement Deadline Date
					ACTIVE		06/14/2022

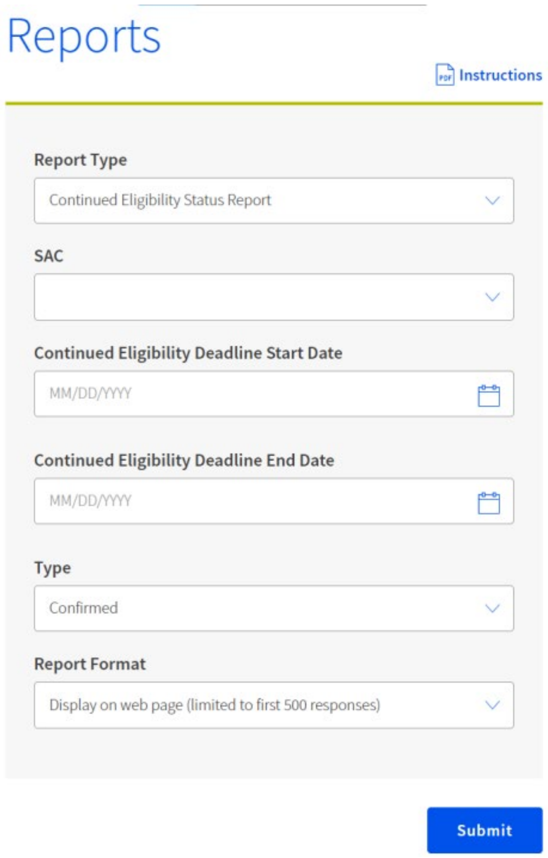
Show 25 records/page

1 of 1 pages

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.

Export to CSV

Displaying 1-25 of 41 records

Instructions

Continued Eligibility Status	Application ID	SAC	Subscriber ID	Last Name	First Name	ETC General	Continued Eligibility Check Date	Continued Eligibility Deadline Date	Failed Continued Eligibility Deenroll Date
In Progress							11/12/2021		
In Progress							11/24/2021		
In Progress							03/22/2022		
Confirmed Eligibi...							11/09/2021	12/10/2021	

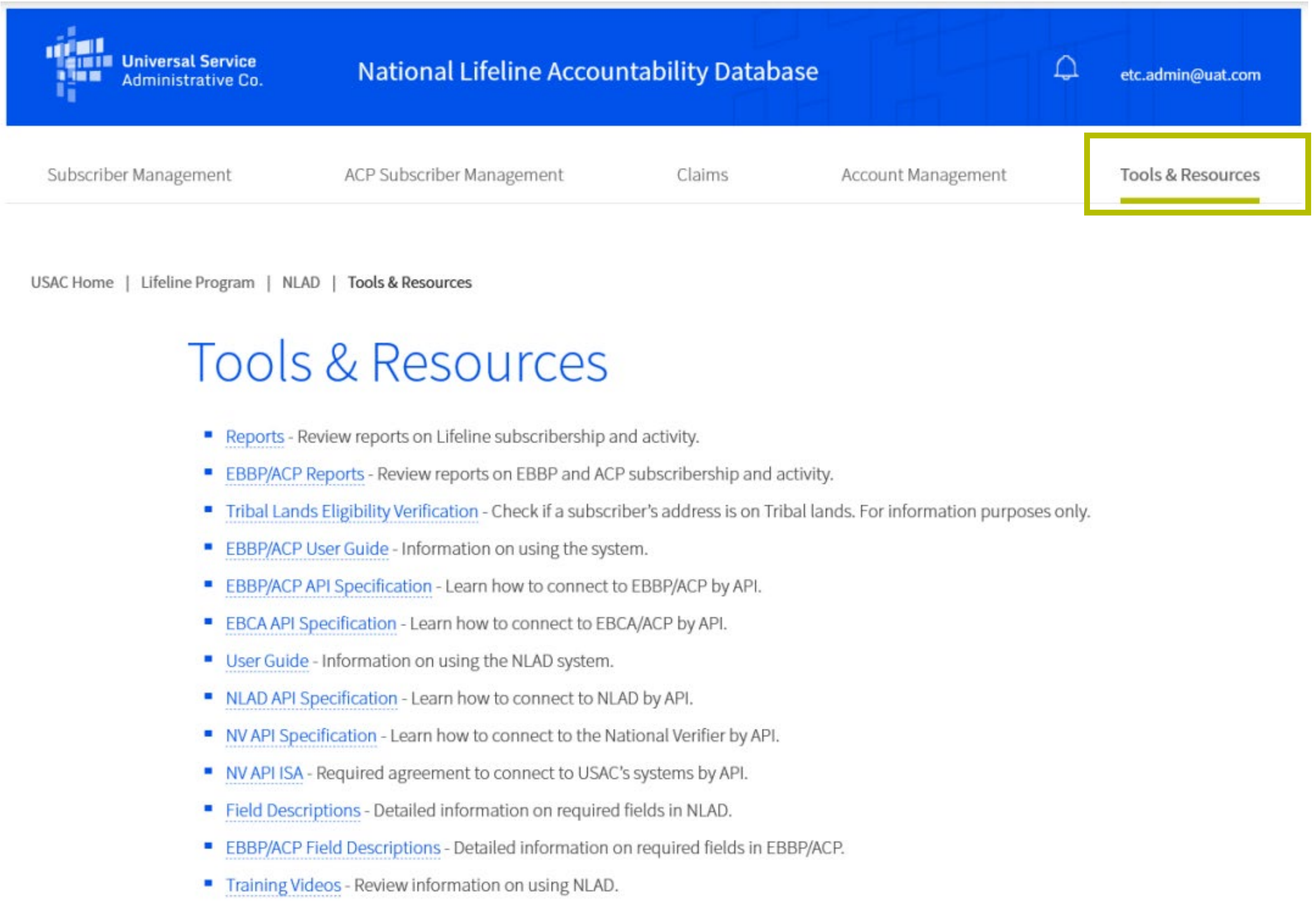
Questions?

Resources

Resources

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

- Reports
- User Guide
- API Specifications
- Field Descriptions



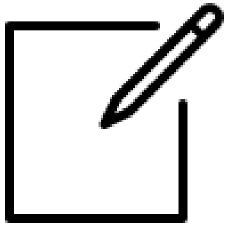
NLAD Resources

- 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.