May 2023 Monthly Webinar
NLAD 101: Part Two

May 10, 2023
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

- 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 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

- 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

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

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
Available for Public Use

Reports

Recertification Subscriber Status Report

- Shows status of subscribers undergoing the recertification process by SAC

![Recertification Subscriber Status Report](image)

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

<table>
<thead>
<tr>
<th>Recertification Status</th>
<th>SAC</th>
<th>Subscriber ID</th>
<th>ETC General Use</th>
<th>Last Name</th>
<th>Sub Recert Deadline</th>
<th>Eligibility Docs Required</th>
<th>Eligibility Docs Accepted</th>
<th>Eligibility Doc Rejection Reason</th>
<th>Address Resolution Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recertified</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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 - ETC Admin

Displaying 1-1 of 1 records

<table>
<thead>
<tr>
<th>SPIN</th>
<th>Username</th>
<th>First Name</th>
<th>Last Name</th>
<th>Representative ID</th>
<th>Status</th>
<th>Lockout Start Date</th>
<th>Annual Agreement Deadline Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>e</td>
<td>t.com</td>
<td>ETC ADMIN</td>
<td>L.AT</td>
<td>-</td>
<td>ACTIVE</td>
<td>09/20/2022</td>
<td></td>
</tr>
</tbody>
</table>

Show: 25 results/page
Export to CSV
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
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Thank You!