Lifeline April 2024 Monthly Webinar

How to Perform Transactions in the National Lifeline Accountability Database (NLAD)
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.
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!
Meet Our Team

Linnita Hosten
Senior Communications Specialist | Lifeline

Delanté Cherry
Communications Associate | Lifeline
Agenda

• Announcements
• Lifeline Program Overview
• National Lifeline Accountability Database (NLAD) Overview
• Performing NLAD Transactions
  • Update Subscriber
  • Transfer Subscriber
  • De-enroll Subscriber
• Reports
• Resources
Announcements
Announcements
Updated 2024 Federal Poverty Guidelines

• The 2024 Federal Poverty Guidelines (FPGs) were released on January 17, 2024. These guidelines determine if a consumer can qualify for Lifeline through their income.
  • To qualify for Lifeline through income, a consumer’s income has to be at or below 135% of the FPGs.

• USAC has updated the Lifeline application and recertification forms, consumer outreach materials (mail and email), and website content to reflect the 2024 FPGs at 135%.

• Service providers should update their forms and systems as soon as possible.

• Service providers in opt-out states (California, Texas, and Oregon) that have state-issued forms should follow their state’s guidance.
Announcements
Lifeline Mailing Address Transition (Coming Soon)

• The mailing address for the Lifeline Support Center will transition to a new address in June.
• USAC will release further guidance, including the new PO box address soon.
Announcements
Reverification Group Two: Document Submission Reminder

- **Reverification** is a one-time process to confirm that all subscribers enrolled in the Lifeline program through legacy processes (i.e., pre-National Verifier processes) meet the National Verifier’s eligibility standards.

- Reverification is currently ongoing for Group Two. This group includes Puerto Rico, California (broadband only), Florida, Illinois, Minnesota, Ohio, and Wisconsin.

- Service providers have until **May 5, 2024**, to view the Reverification Subscriber Status Report in NLAD, review any failures, and submit existing on-hand documentation to resolve the failure(s).
Announcements
Reverification: Document Submission Reminder (Cont.)

• Existing on-hand documentation will be accepted to resolve address, duplicate address, or identity failures.
  • **Note:** Proof of life and eligibility documents must be current and valid. Service providers are not expected to have these documents on hand. USAC will perform outreach to consumers if these documents are needed.

• Service providers have **two options** to submit documents:
  • Mail
  • Online
  • **Incorrectly formatted documents will not be processed.** Be sure to follow the [Reverification Document Upload Process](#) instructions.
Announcements
Reverification Subscriber Status Report Enhancement

- On March 20, 2024, USAC added a **Reverification End Date** column to the Reverification Subscriber Status Report.
- This enhancement enables service providers to view when subscribers could potentially be de-enrolled due to failed reverification.
National Lifeline Accountability Database Overview
National Lifeline Accountability Database

Background

The National Lifeline Accountability Database (NLAD) allows service providers to enroll Lifeline eligible consumers in the program and perform certain transactions to manage their Lifeline subscribers.

- NLAD is available through USAC’s One Portal system, which allows users to access all Universal Service Fund IT applications through the same portal.
  - In most states (with the exception of NLAD opt-out states – California*, Oregon, and Texas), service providers use NLAD to enroll their consumers.
- Service providers must enroll subscribers in NLAD to claim reimbursements.

*Service providers in California with broadband-only subscribers must use NLAD to enroll these subscribers.
National Lifeline Accountability Database
Update Requirements

- 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.
  - When a service provider de-enrolls a subscriber from Lifeline, NLAD must be updated within one (1) business day.
  - Service providers must update NLAD within ten (10) business days of receiving an account information change (for example, change of address or name change).

Reminder: To perform applicable NLAD transactions, NLAD users are required to register for a Representative ID and link that ID to their NLAD account. For more information, visit the Representative Accountability Database (RAD) webpage.
Performing NLAD Transactions
National Lifeline Accountability Database

Transaction Types

• **Verify**: Allows a provider to pre-validate whether a subscriber transaction would successfully process in NLAD.

• **Enroll**: Enrolls a new subscriber in Lifeline and adds the consumer to the service provider’s NLAD subscriber records.

• **Update**: Allows a provider to update certain subscriber information such as the subscriber’s contact information.

• **Transfer**: Transfers an existing Lifeline subscriber from their current service provider in NLAD to allow the transacting provider to provide Lifeline service to the subscriber.

• **De-Enroll**: Removes or de-enrolls a subscriber from NLAD who no longer receives the Lifeline benefit.
National Lifeline Accountability Database
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).

• **Batch Upload:** Providers can complete a [batch template](#) (CSV format file) to perform multiple transactions from a single file upload in NLAD.

• **NLAD API:** Providers can use an Application Programming Interface (API), which connects their billing or customer management system directly to NLAD to perform transactions.
Accessing NLAD

- Access NLAD online through USAC’s One Portal.
Accessing NLAD

- Once logged into One Portal, select NLAD.
Accessing NLAD

- After logging into NLAD, the default homepage will lead to the Subscriber Management section of NLAD, where service providers can access workflows to perform various transactions.

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 enrollment status.
- **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 time.
- **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.
Update Subscriber
Update Subscriber

- The Update Subscriber workflow allows service providers to:
  - Search for a subscriber using their phone number or Subscriber ID.
  - Edit specific subscriber information.
Update Subscriber

• In the Select Type field, service providers should indicate how they would like to search for a subscriber and enter the subscriber’s phone number or Subscriber ID.

• In the Update Type field select Production (to search for active subscribers).
Update Subscriber

- If a match is not found, a Subscriber Not Found error message will display.
Update Subscriber

- If a matching subscriber is found, their personal information will be displayed along with the following editable fields:
  - 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.
- Confirmation that the subscriber’s record has updated will appear on the screen.
Questions?
Transfer Subscriber
Transfer Subscriber

- Navigate to the **Subscriber Management** page and locate Transfer Lifeline Benefit.
- The Transfer Lifeline Benefit workflow allows service providers to transfer a qualified subscriber’s benefit to another company.
Transfer Subscriber
Enter 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

Note: If a Benefit Qualifying Person (BQP) is included on the enrollment record, their first and last name, date of birth, last 4 digits of SSN, or Tribal ID (if applicable) must be included on the transfer record.
Transfer Subscriber
Enter Subscriber Information

Option 2

• Select the **Application ID Enrollment** checkbox and complete the following fields:
  • First Name
  • Last Name
  • Date of Birth
  • Application ID
  • BQP First Name (if applicable)
  • BQP Last Name (if applicable)
Transfer Subscriber
Enter 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, or bundled voice and broadband.
  • **Service Initiation Date:** Date the service provider initiated the Lifeline service.
  • **Telephone Number:** Subscriber's phone number (if applicable).
Transfer Subscriber
Enter 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 service providers 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 for accuracy and click Transfer to complete the transaction.
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.
Transfer Subscriber
Successful Transfer

• Confirmation that you have successfully completed the subscriber transfer includes 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.
De-Enroll Subscriber
De-Enroll Subscriber

- Navigate to the **Subscriber Management** page and locate De-enroll Subscriber.
- The De-Enroll Subscriber workflow allows you to remove a subscriber from NLAD who no longer receives the Lifeline benefit.
De-Enroll Subscriber

• In the Select Type field, service providers should indicate how they would like to search for a subscriber and enter the subscriber’s phone number or Subscriber ID.

• In the De-enroll Type field, select **Production** (to search for active subscribers to de-enroll).
De-Enroll Subscriber

- If a matching subscriber is found, the subscriber's personal information will be displayed for review.
- Be sure to verify the correct subscriber's record is displayed.
De-Enroll Subscriber

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

- If the transaction is successful, confirmation that the subscriber was de-enrolled will be displayed.
Poll
Questions?
Reports Overview
Reports Overview

- NLAD reports are located in the Tools & Resources section.
Reports Overview

Types of Reports

- Select the type of report you would like to review.
  - **Detail Reports**: Full records along with other relevant reporting fields.
  - **Summary Reports**: Records that fall within the specified parameters.
- Report data is limited to the Study Area Codes (SACs) and Service Provider Identification Numbers (SPINs) assigned to a user’s NLAD account.
**Reports Overview**

**Report Criteria Selection**

- Service providers can select the following criteria when generating a report in NLAD:
  - **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.
Reports
Reports Overview

Types of Reports

- A few of the reports available in NLAD are described in the proceeding slides:
  - Detail Active Subscriber Report
  - Detail Transaction Report
  - Recertification Subscriber Status Report
  - Reverification Subscriber Status Report
  - Continued Eligibility Status Report
Reports
Detail Active Subscriber Report

- This report displays all active subscriber records for a specified SAC at the time the report is generated.
- To view the subscriber data in an Excel file, select Export to CSV.
Reports
Detail Transaction Report

- This 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

- This report displays subscribers undergoing the recertification process arranged by SAC.

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.

<table>
<thead>
<tr>
<th>Instructions</th>
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<table>
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<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>
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Show 25 records/page
Reports
Reverification Subscriber Status Report

- This report displays all subscribers undergoing the reverification process arranged by SAC.
Reports

Continued Eligibility Status Report

• This report displays all subscribers undergoing the continued eligibility process.
Resources
Resources

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

- User Guide
- Field Descriptions
NLAD Resources

• NLAD 101 for Beginner Users.
• NLAD FAQs.
• 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.
• View NLAD instructional videos on USAC.org.
• Contact LifelineProgram@usac.org for technical questions and assistance and general NLAD inquiries.
Universal Service Administrative Co.