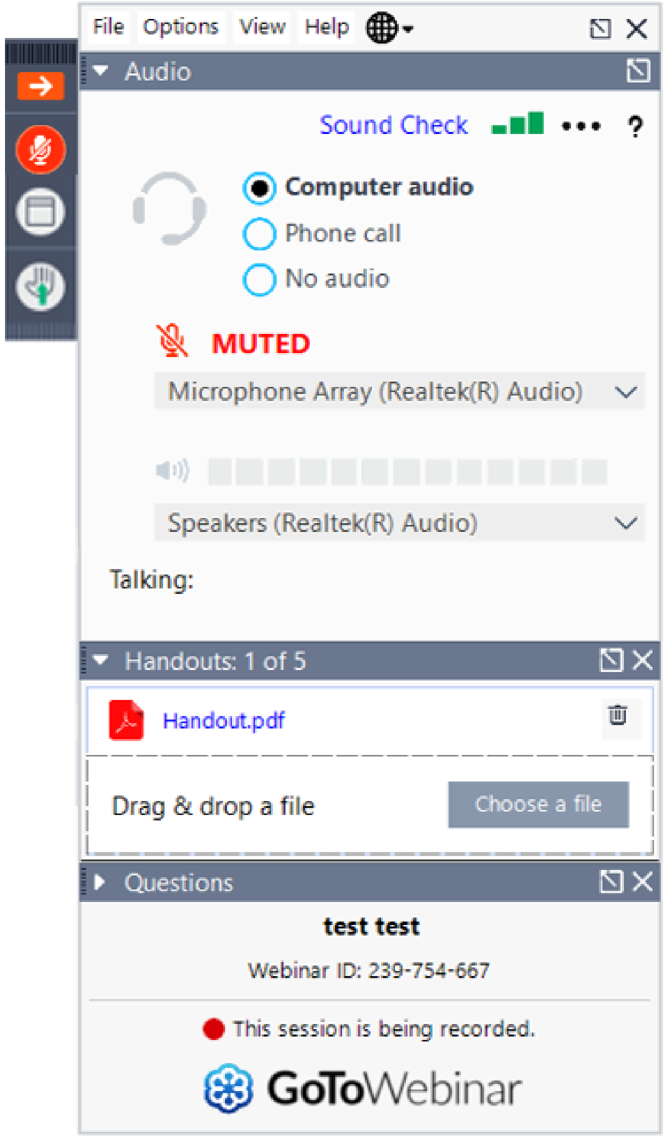
Lifeline April 2024 Monthly Webinar

How to Perform Transactions in the National Lifeline Accountability Database (NLAD)

Universal Service Administrative Co.

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

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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

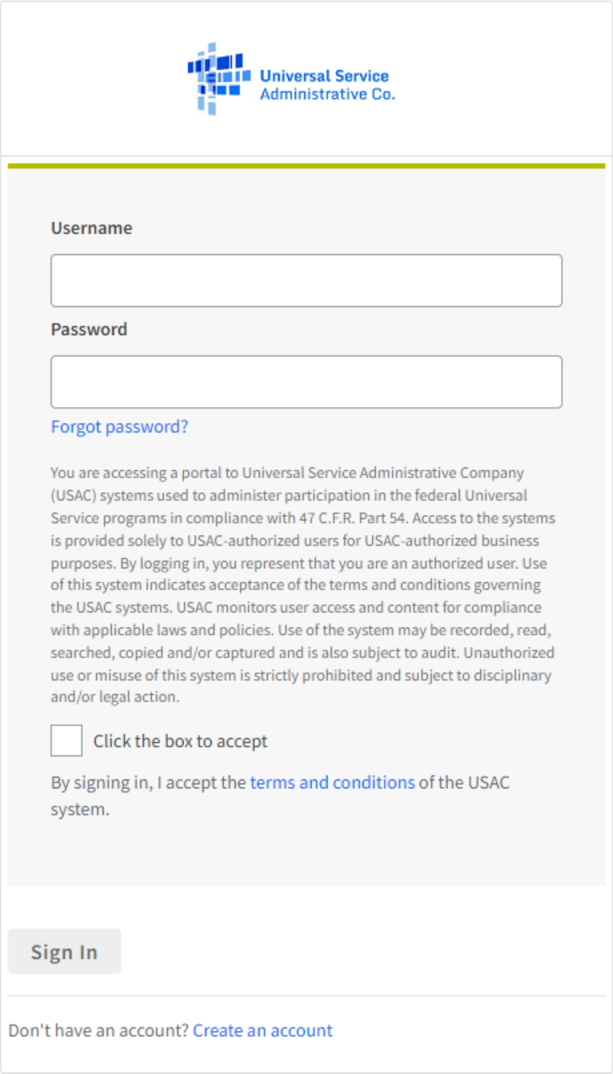
Transaction Methods

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.

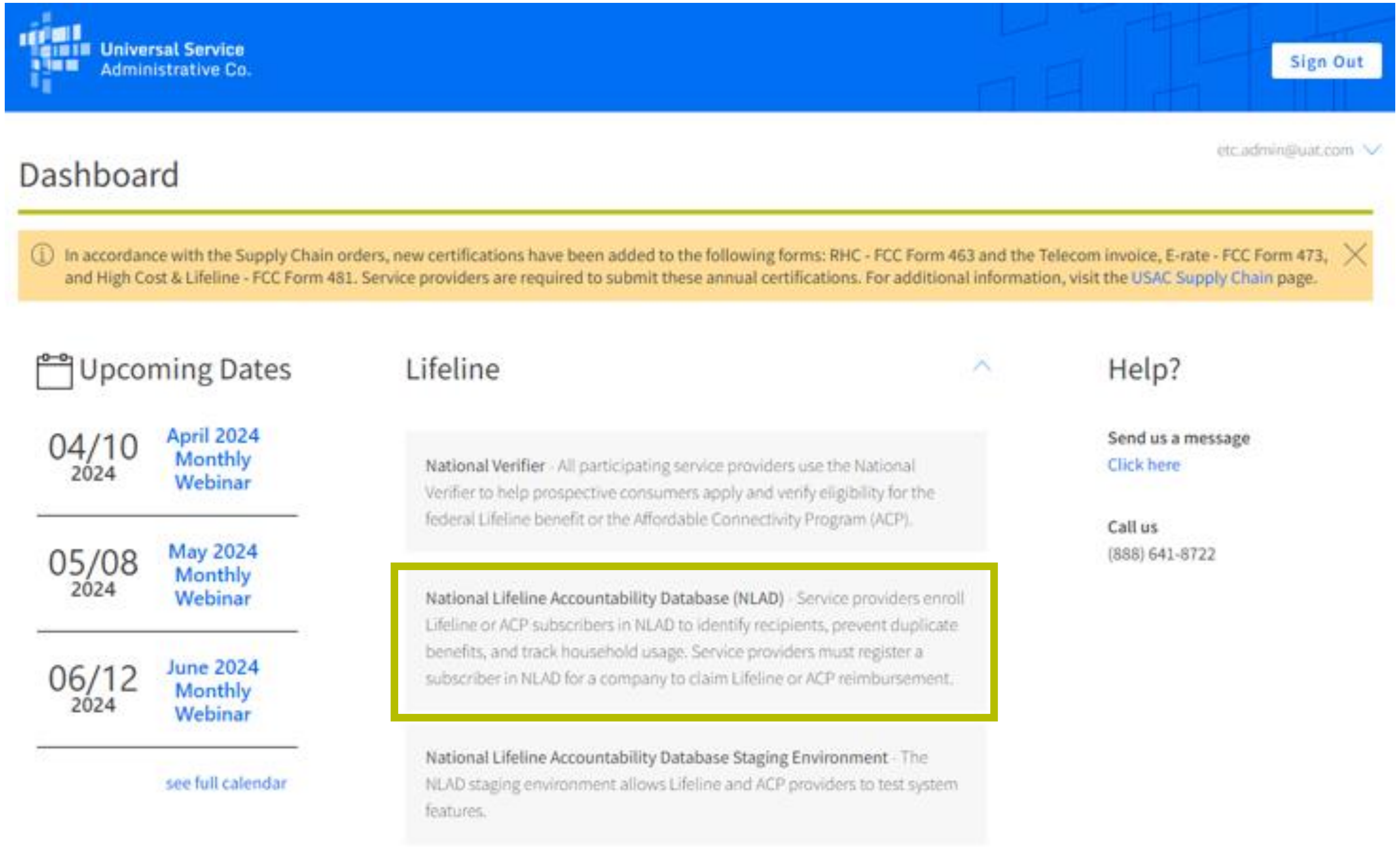
Accessing NLAD

- Access NLAD online through USAC's One Portal.



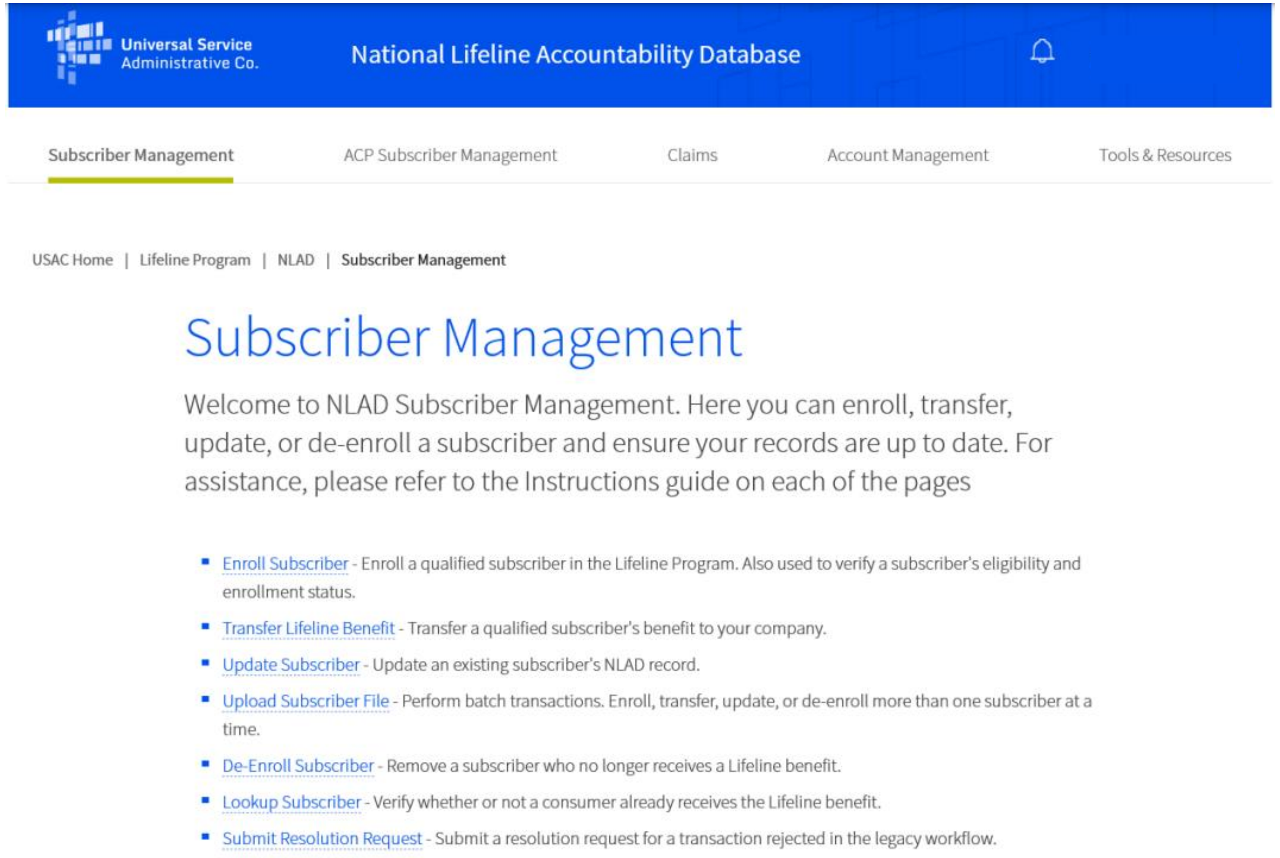
Accessing NLAD

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



Accessing NLAD

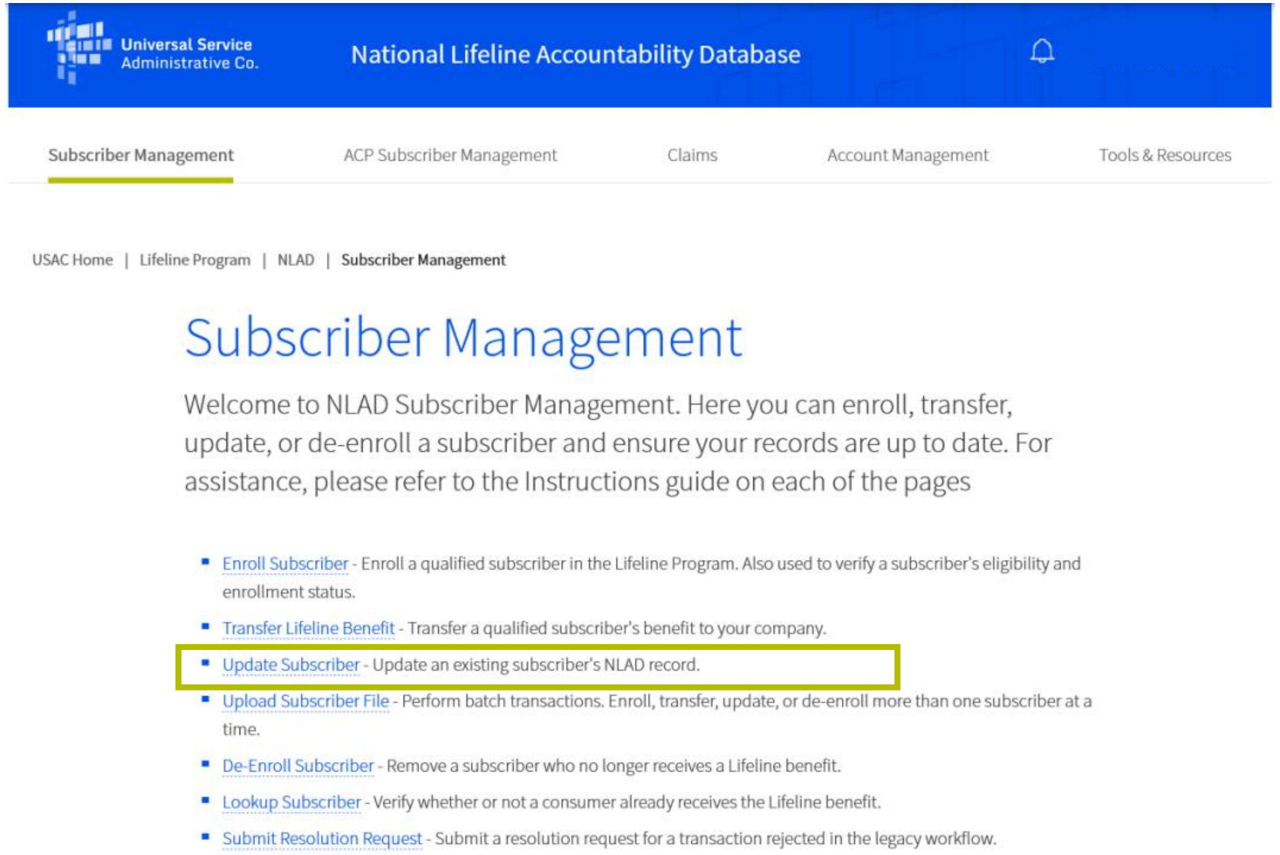
- After logging into NLAD, the default homepage will lead to the Subscriber Management section of NLAD, where service providers can access workflows to perform various transactions.



Update Subscriber

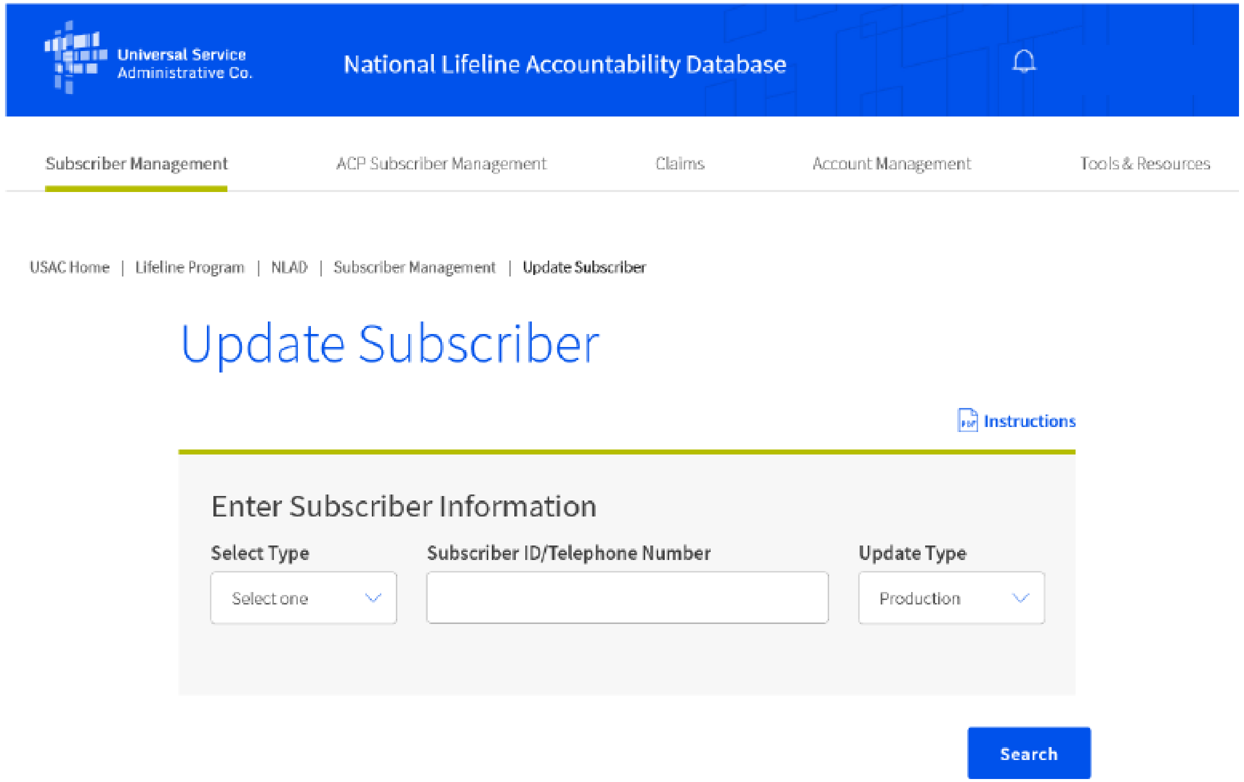
Update Subscriber

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



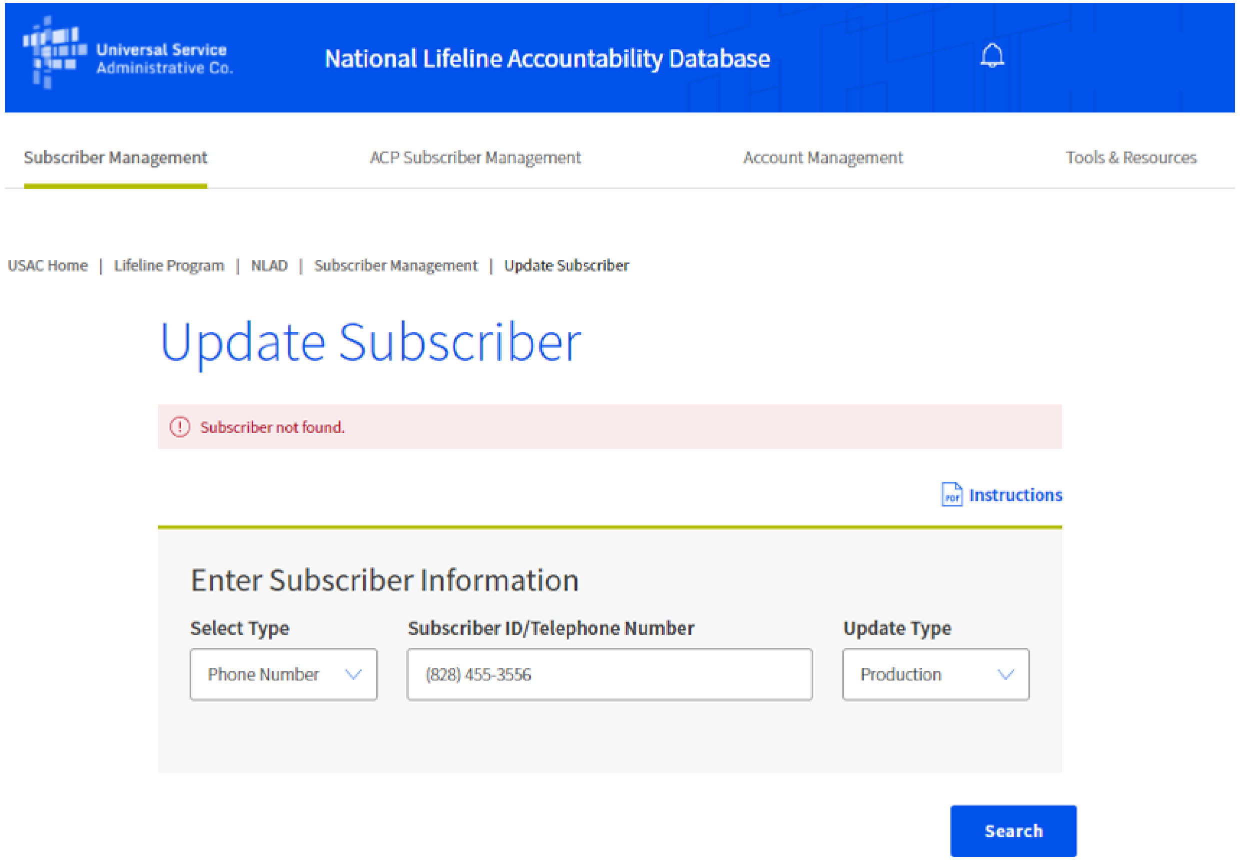
Update Subscriber

- 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).



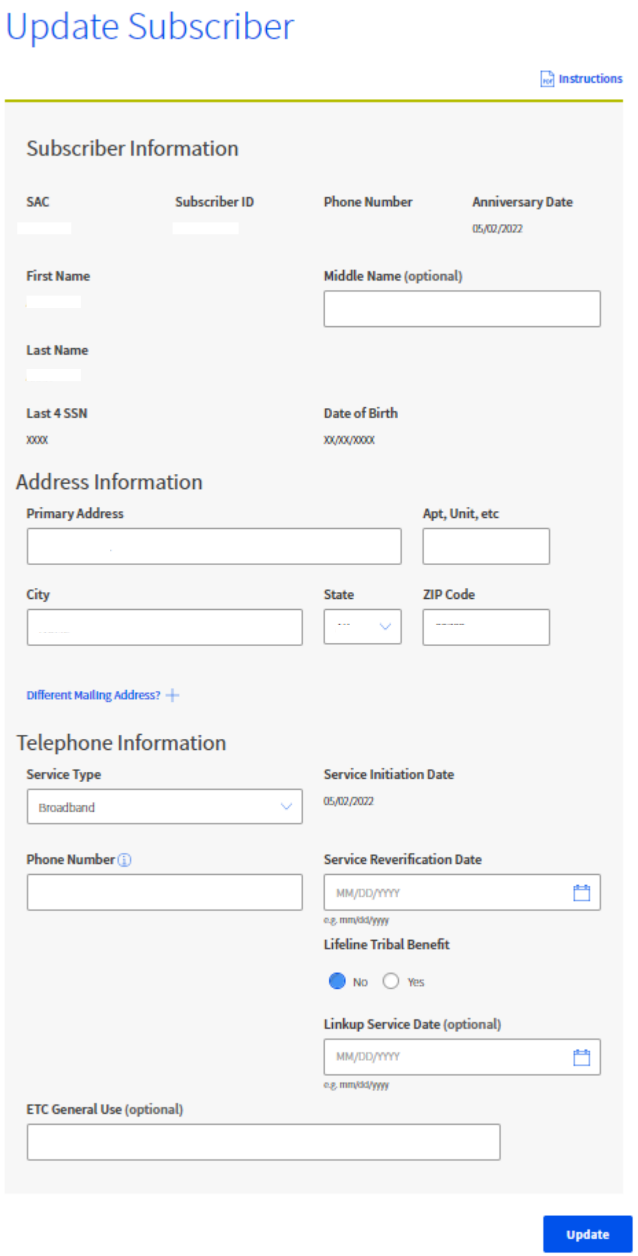
Update Subscriber

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



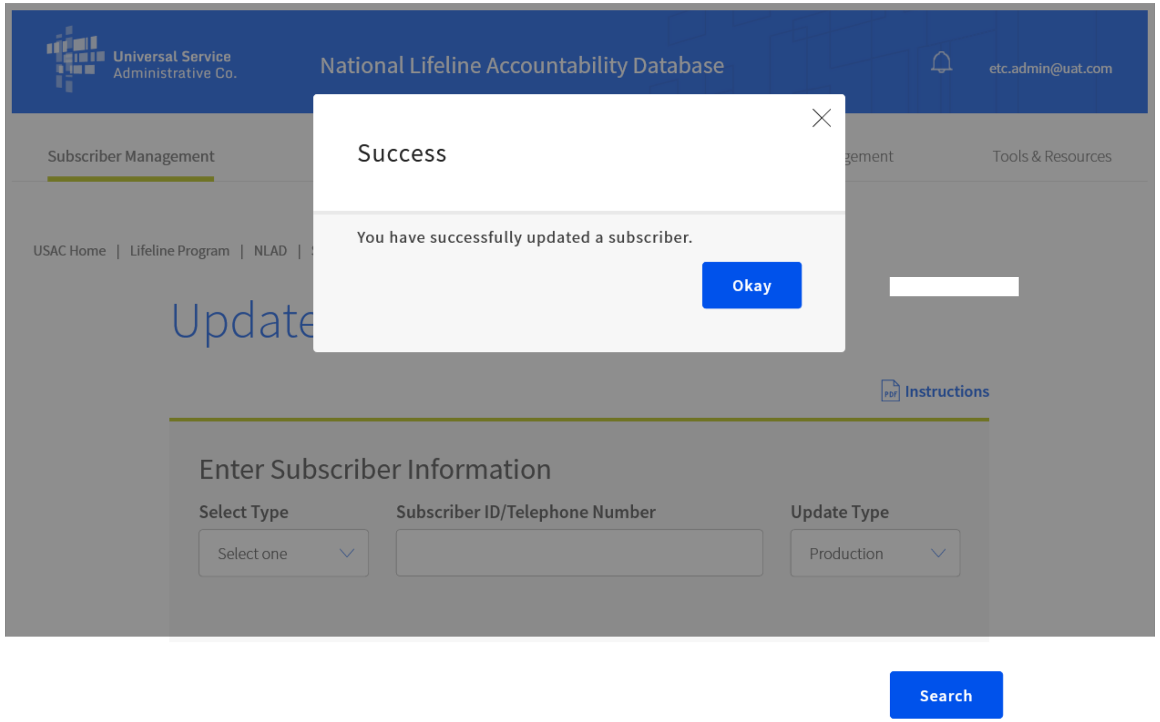
Update Subscriber

- 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.

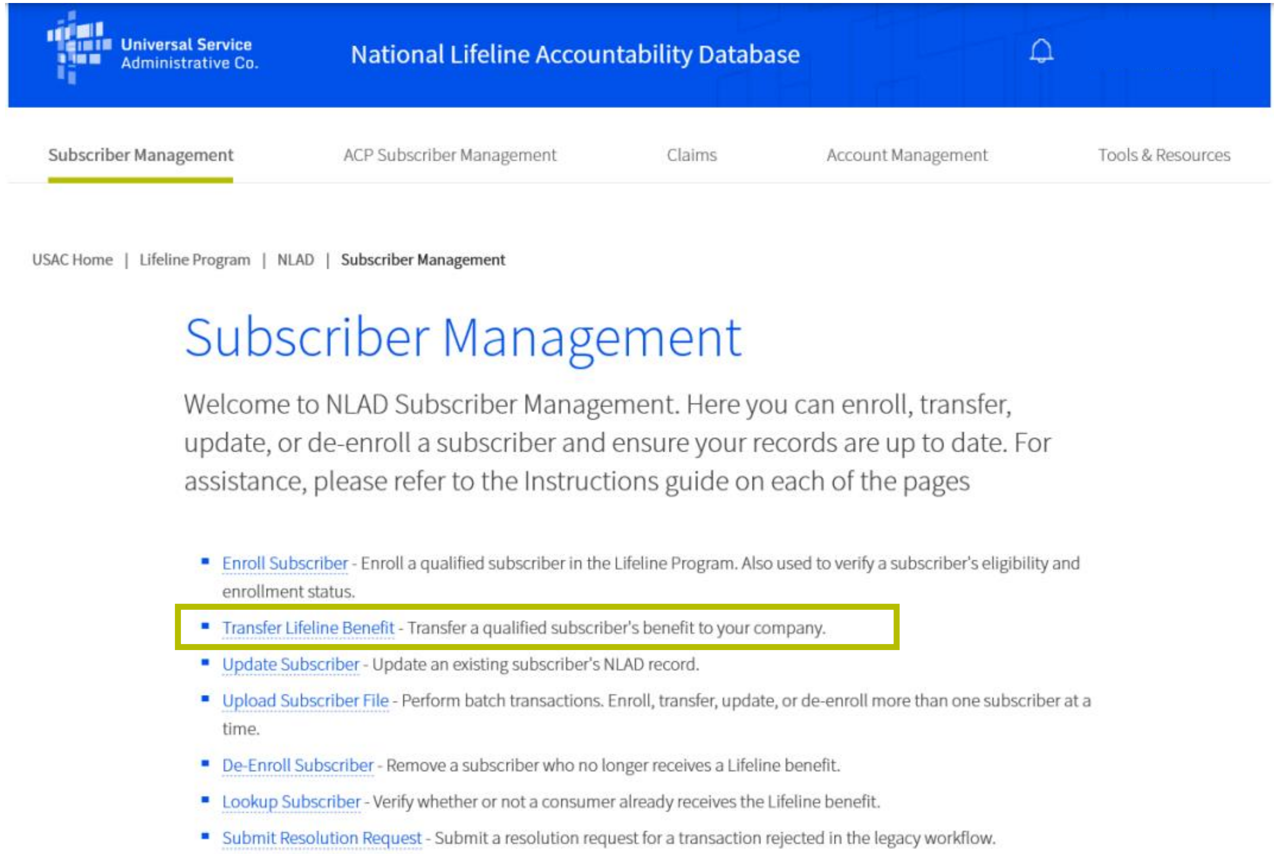


Questions?

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

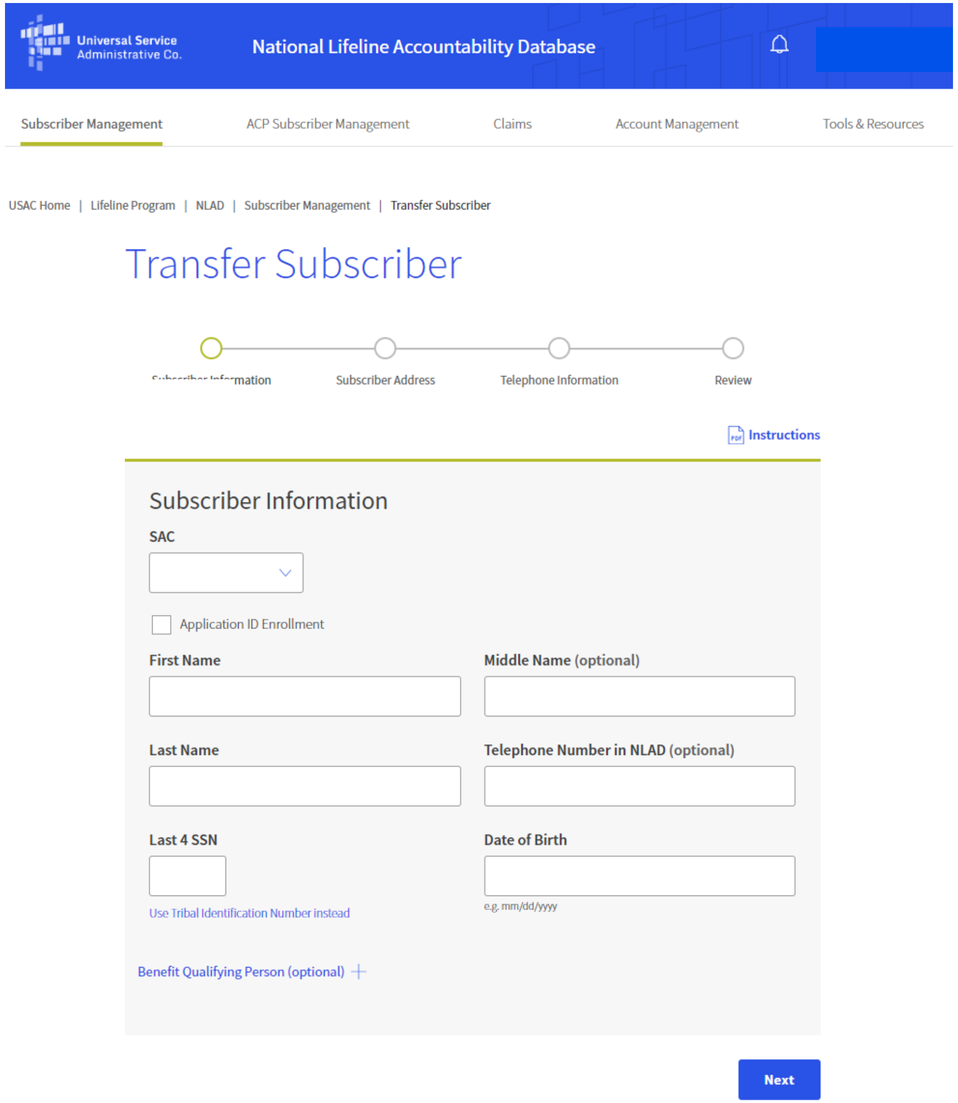
Enter Subscriber Information

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.

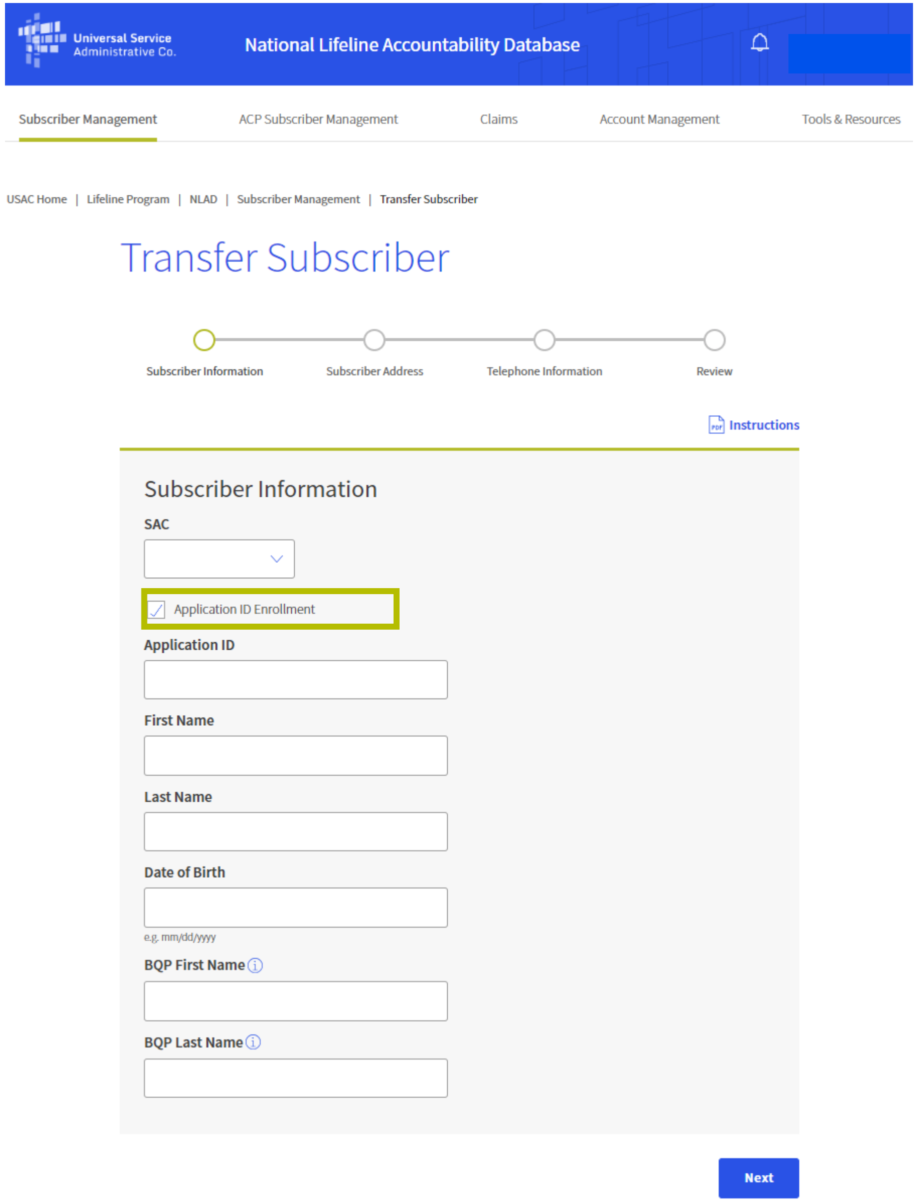


Transfer Subscriber

Enter Subscriber Information

Option 2

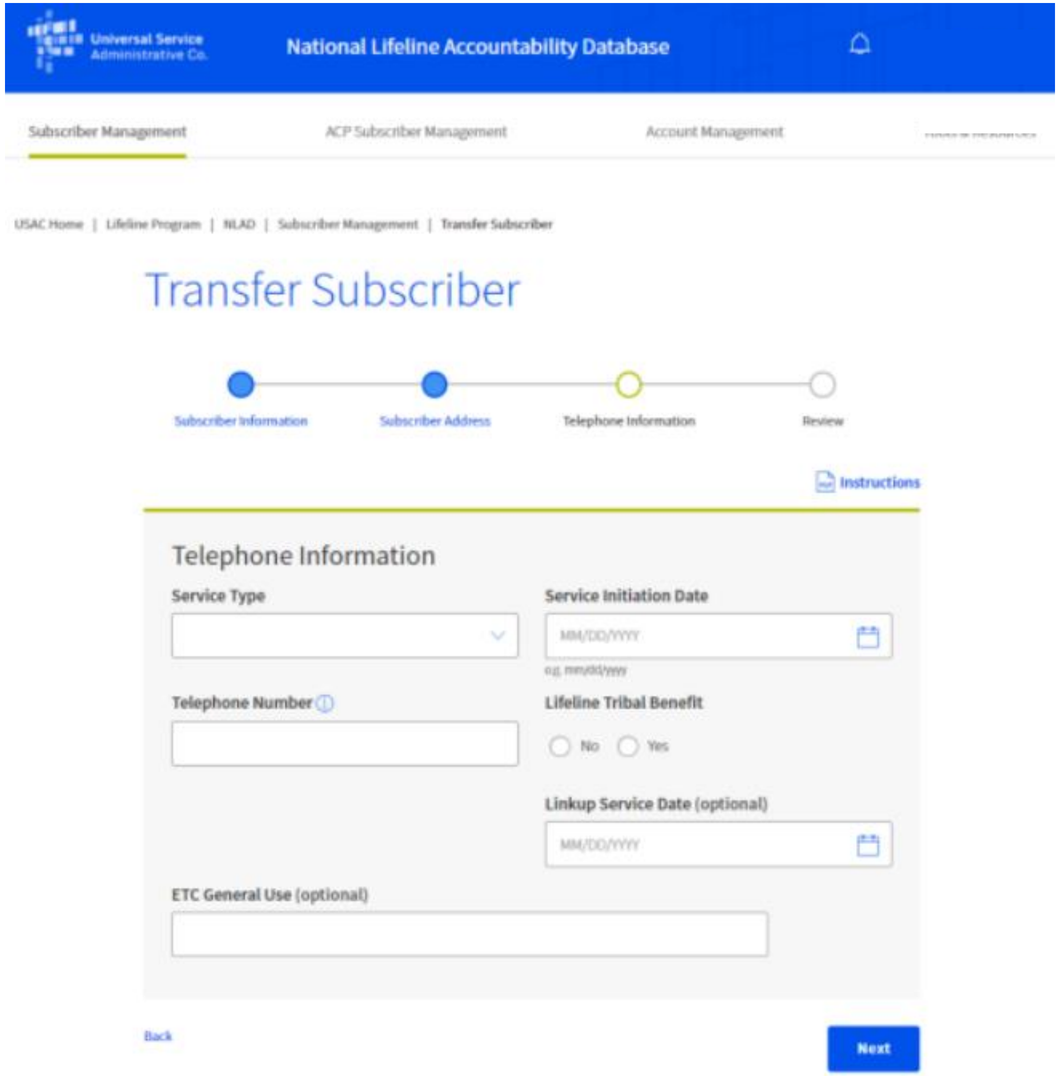
- Select the **Application ID Enrollment** checkbox and complete the following fields:
  - First Name
  - Last Name
  - Date of Birth
  - Application ID
  - BQP First Name (if applicable)
  - BQP Last Name (if applicable)



Transfer Subscriber

Enter Service Information (1 of 2)

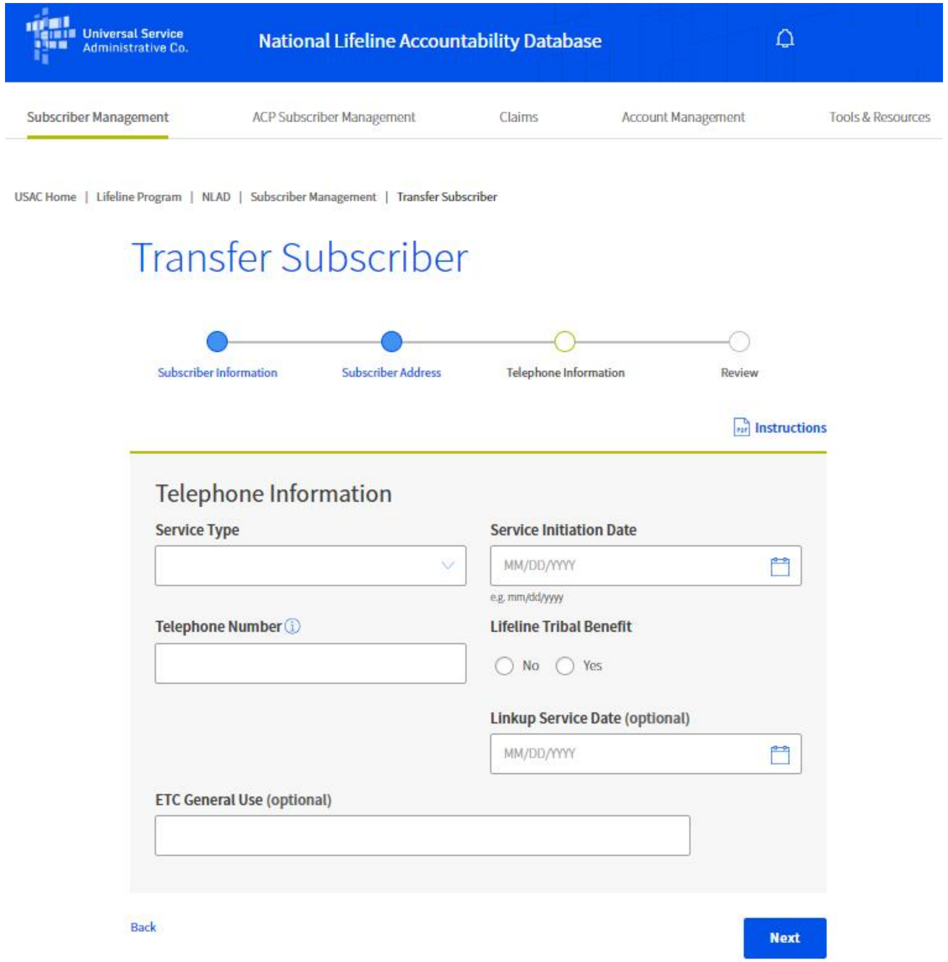
- Enter in the consumer's service information:
  - **Service Type**: Subscriber's Lifeline service offering: voice, broadband, bundled voice, bundled broadband, or bundled voice and broadband.
  - **Service Initiation Date**: Date the service provider initiated the Lifeline service.
  - **Telephone Number**: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



Transfer Subscriber

Enter Service Information (2 of 2)

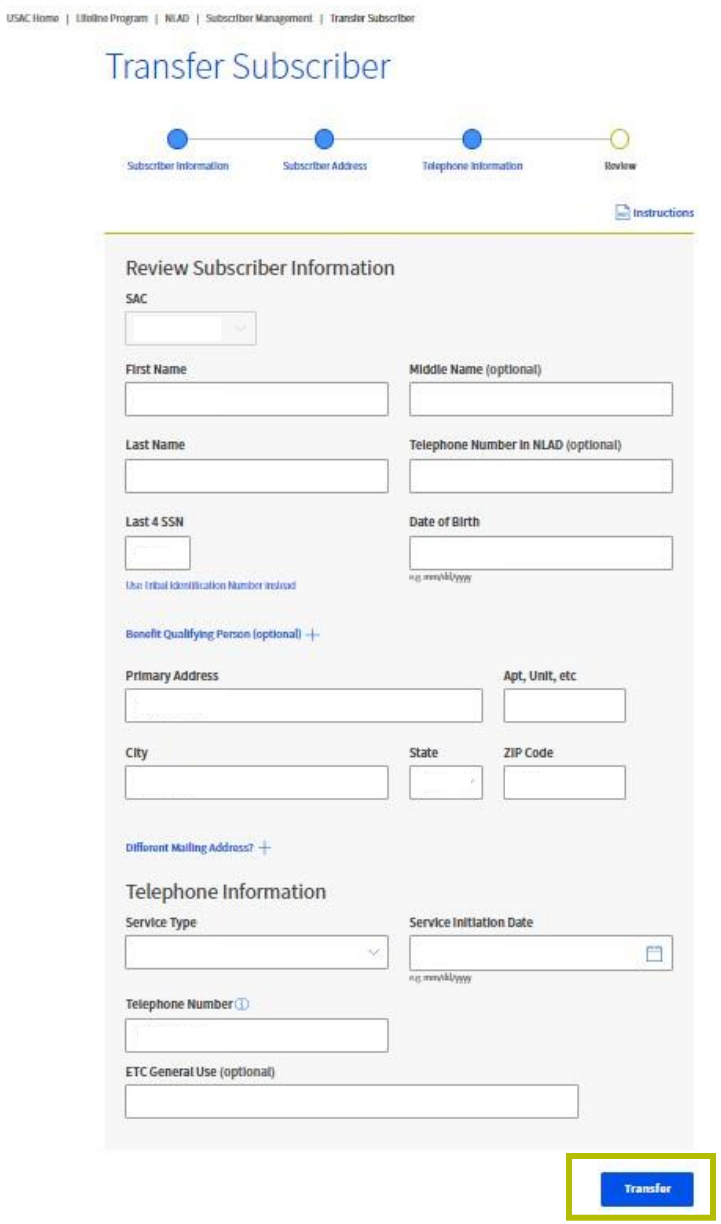
- **Lifeline Tribal Benefit**: Required field to claim Lifeline Tribal support for a qualified subscriber. This field will not appear if the subscriber's address falls on non-Tribal lands.
- **Linkup Service Date**: Date of Linkup Service (mm/dd/yyyy format).
- **ETC General:** Optional field that some service providers use to enter a subscriber's account number or to track the subscriber in their internal systems.



Transfer Subscriber

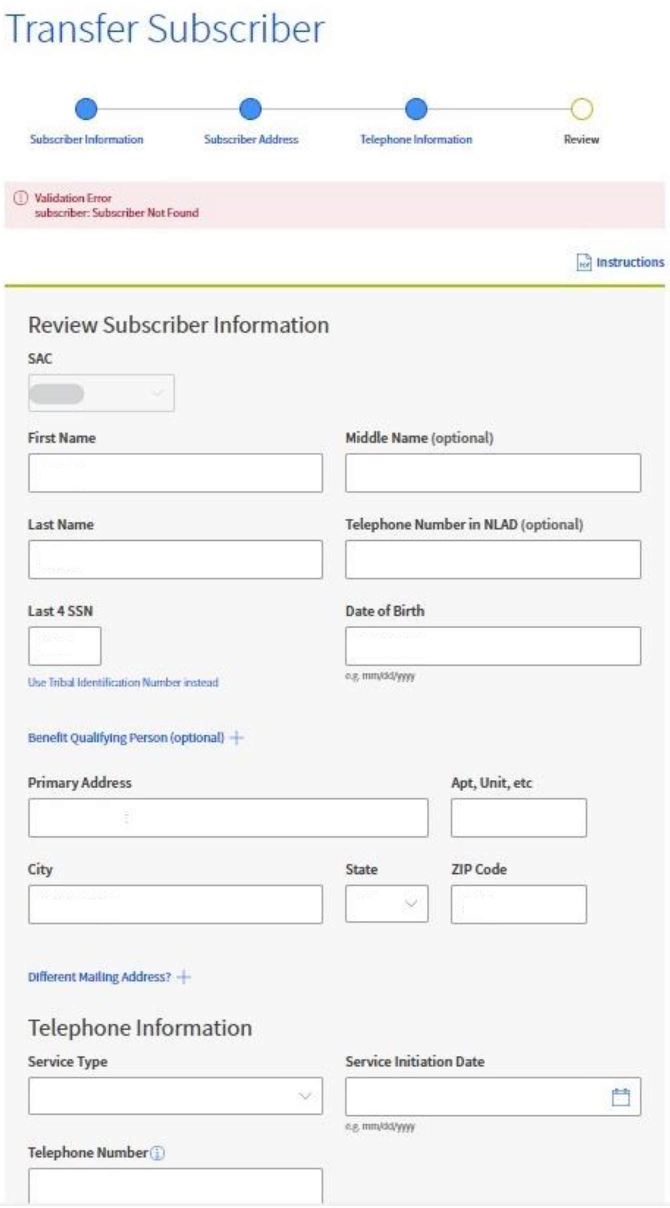
Review Subscriber Information

- Review the subscriber information for accuracy and click **Transfer** to complete the transaction.



Transfer Subscriber
Unsuccessful Transfer

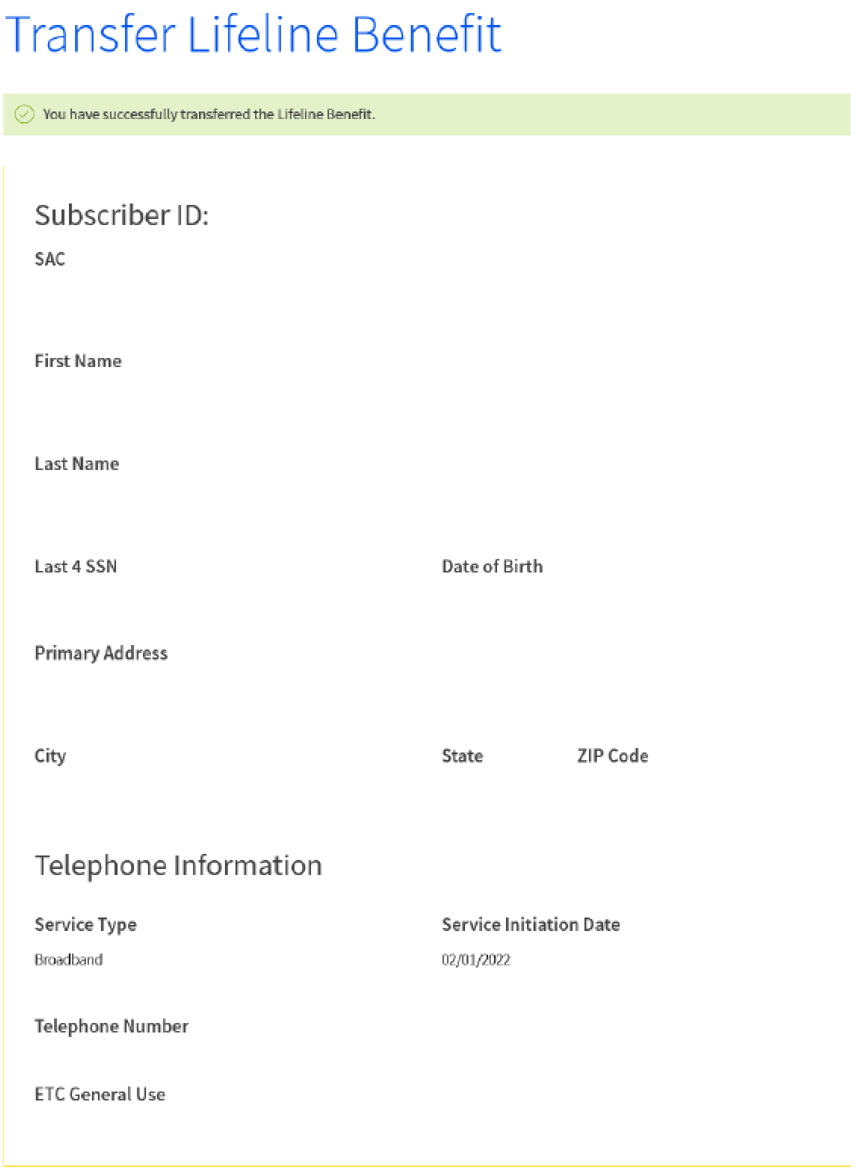
- If a transfer is not successful because of missing or incorrectly formatted data, the associated error messages will display at the top of the page in red.
    - You will be redirected to the **Transaction Unsuccessful** page, where you will see the related error messages, as well as the transaction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


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

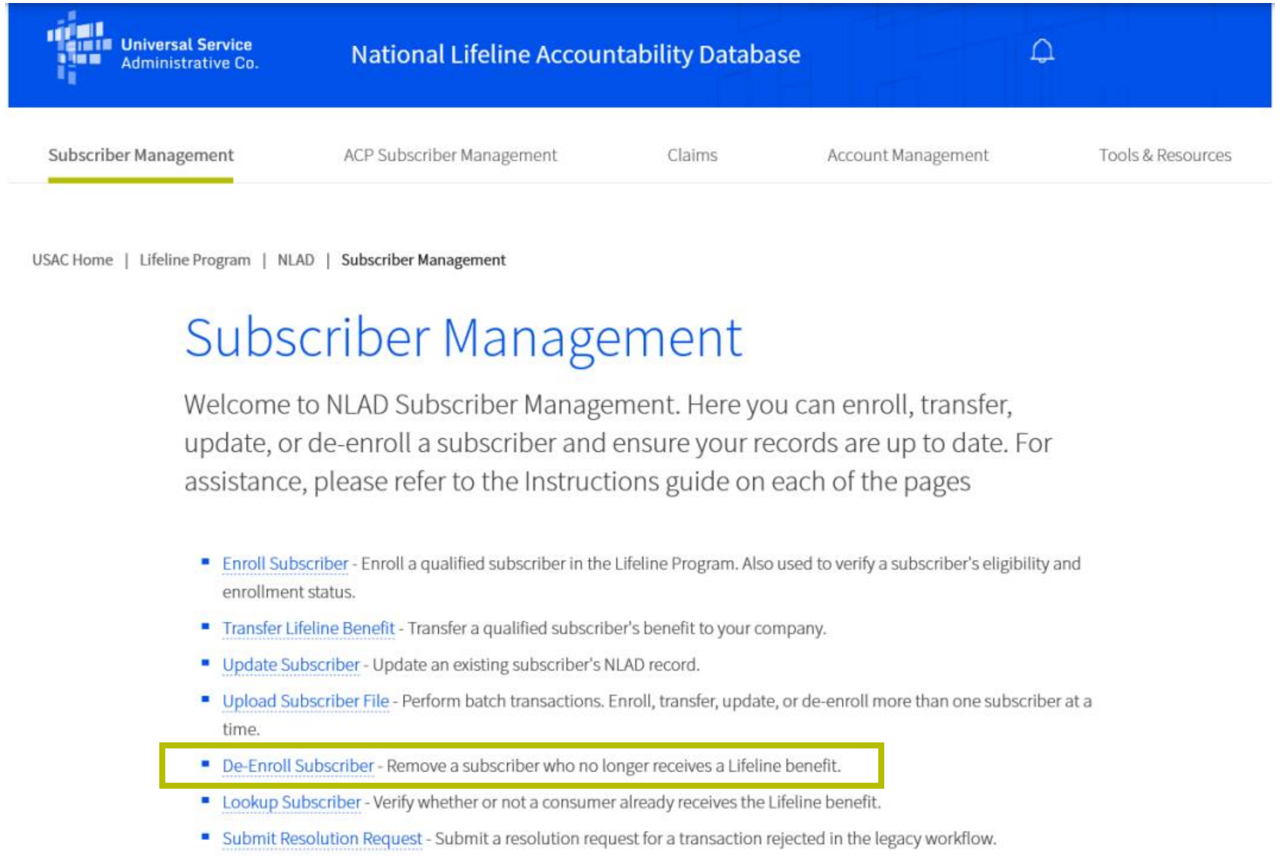
Telephone Number

ETC General Use

De-Enroll Subscriber

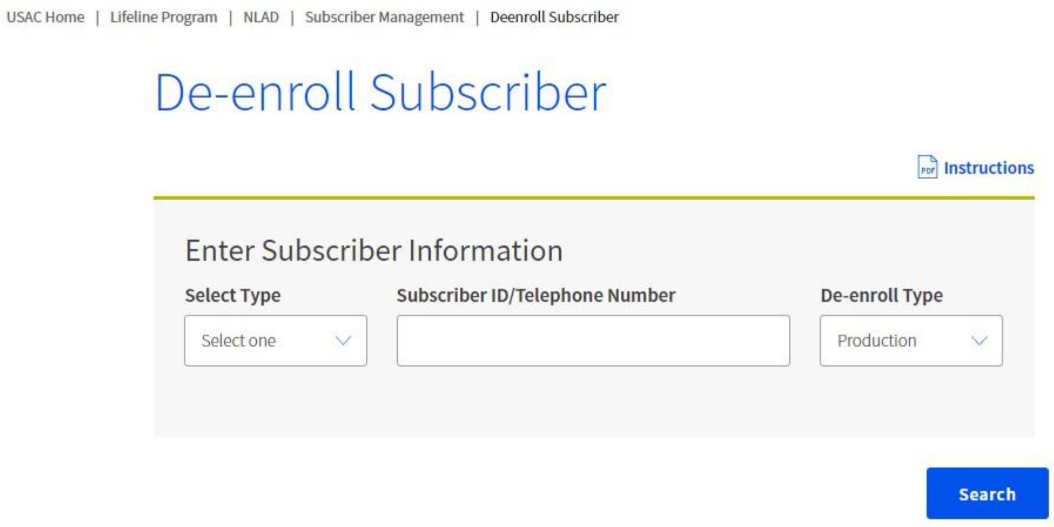
De-Enroll Subscriber

- 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.



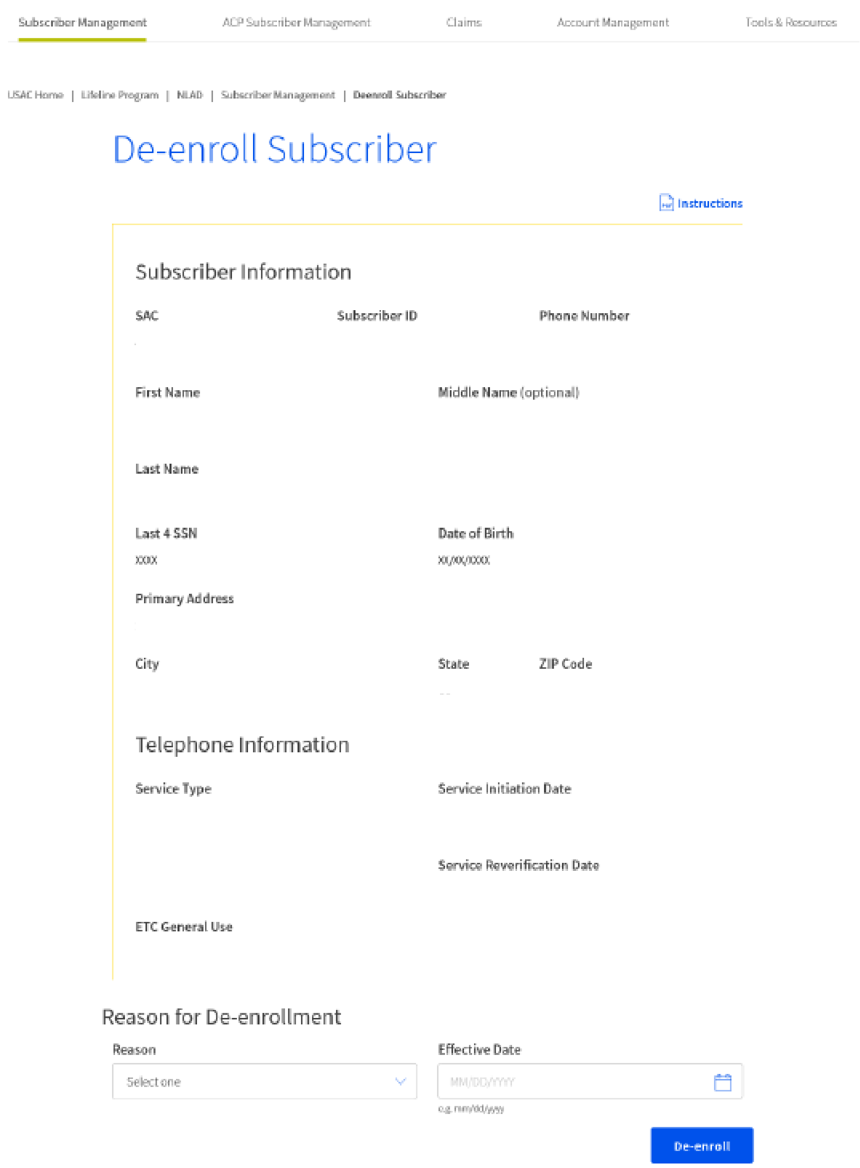
De-Enroll Subscriber

- 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).



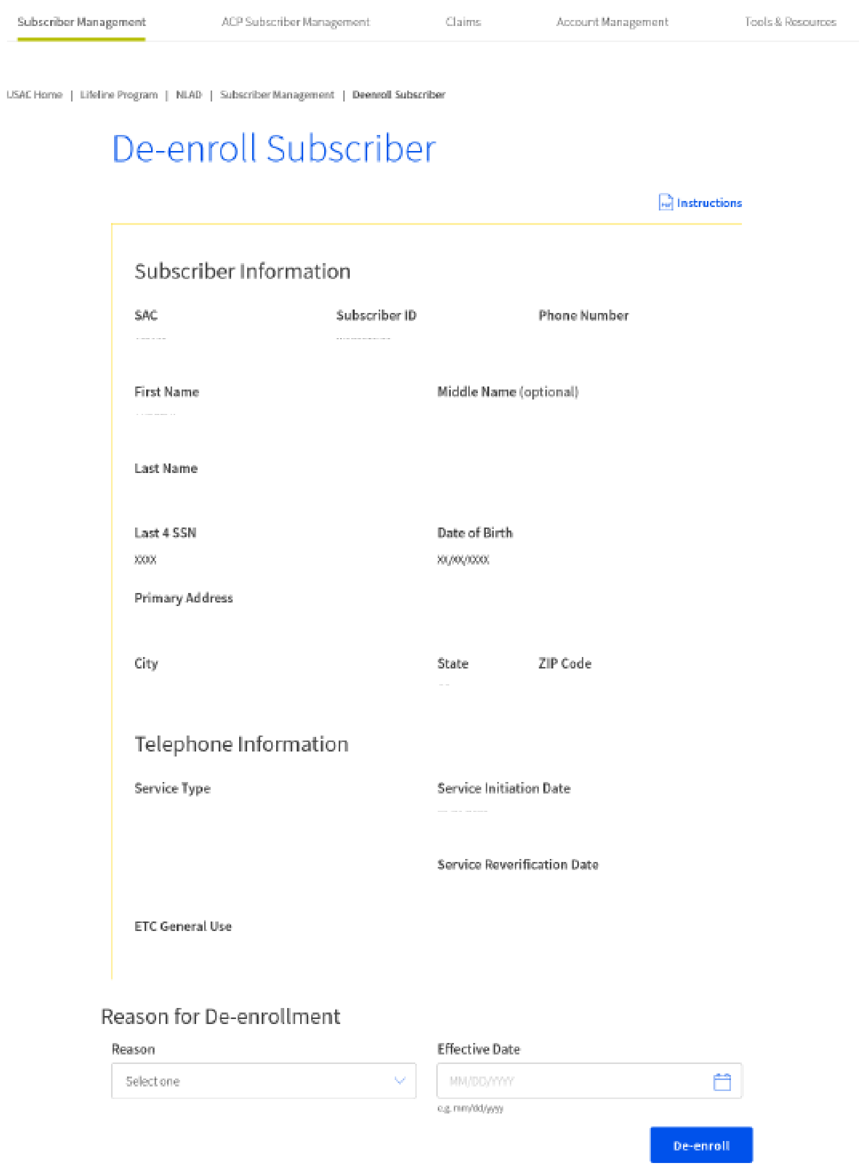
De-Enroll Subscriber

- 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.



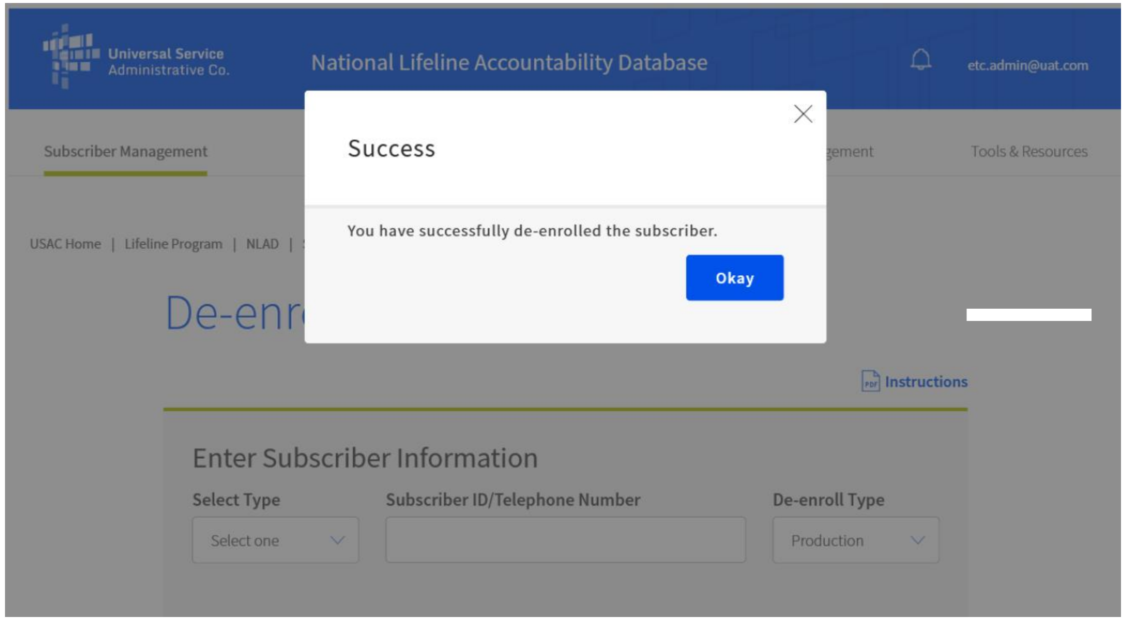
De-Enroll Subscriber

- 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.



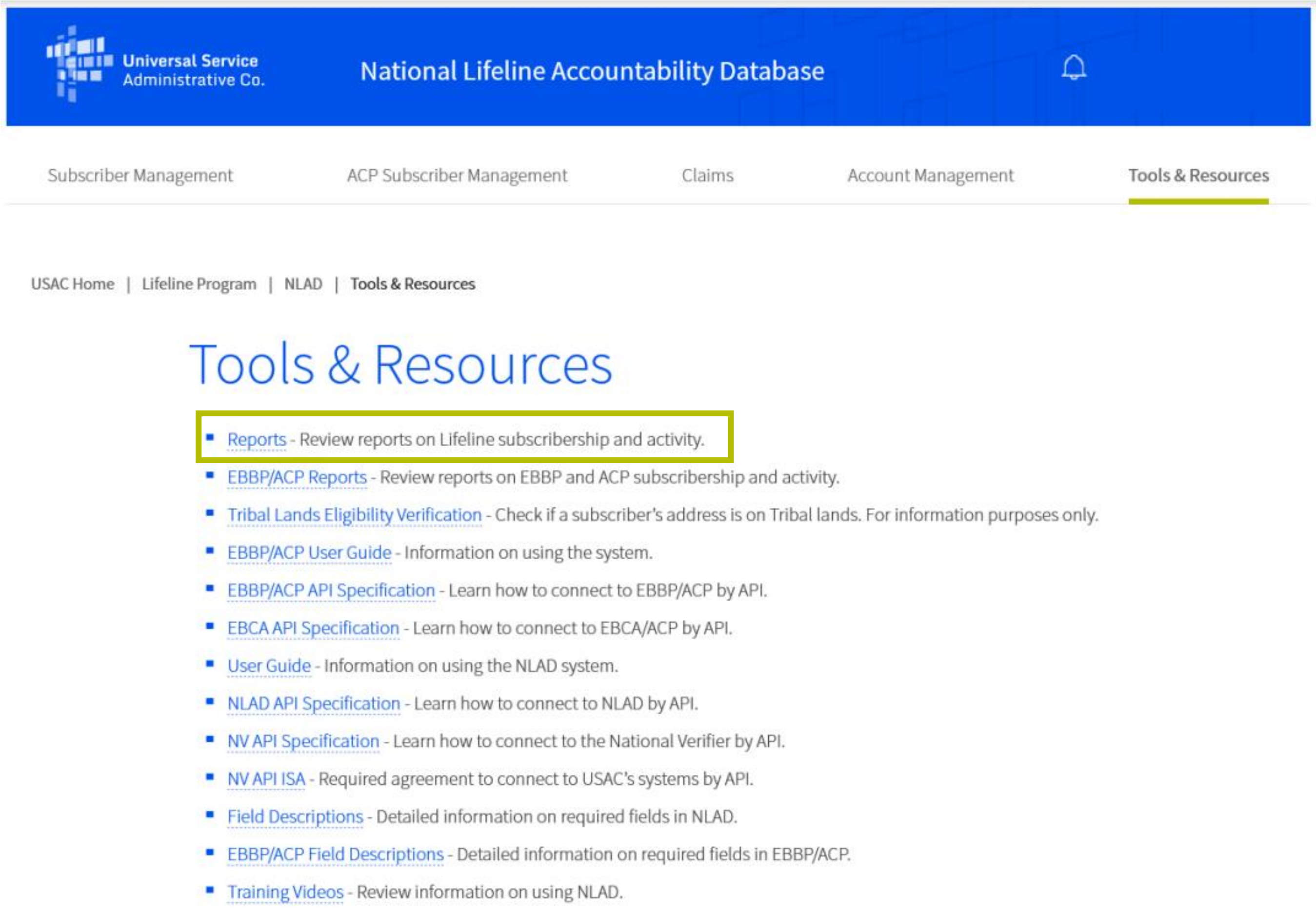
Poll

Questions?

Reports Overview

Reports Overview

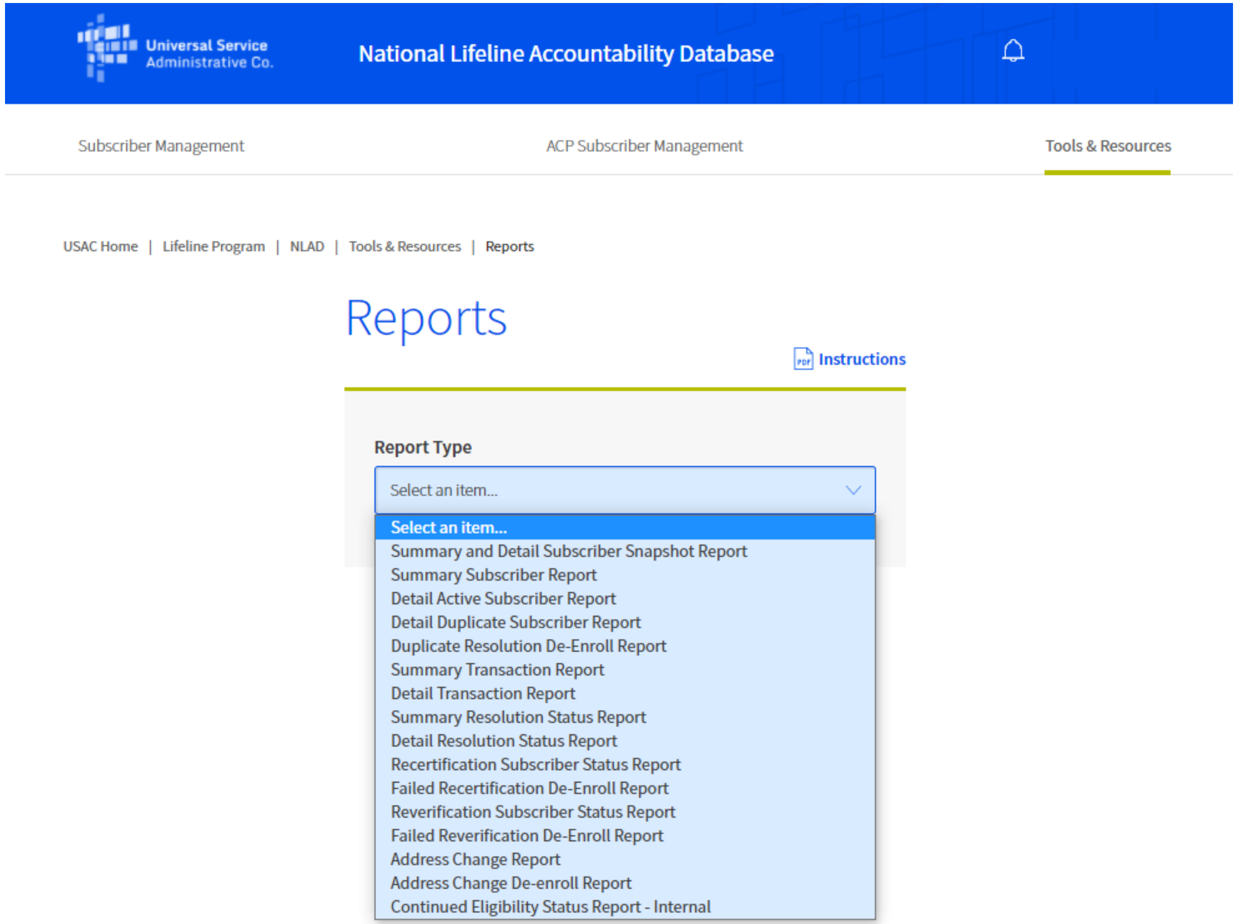
- NLAD reports are located in the Tools & Resources section.



Reports Overview

Types of Reports

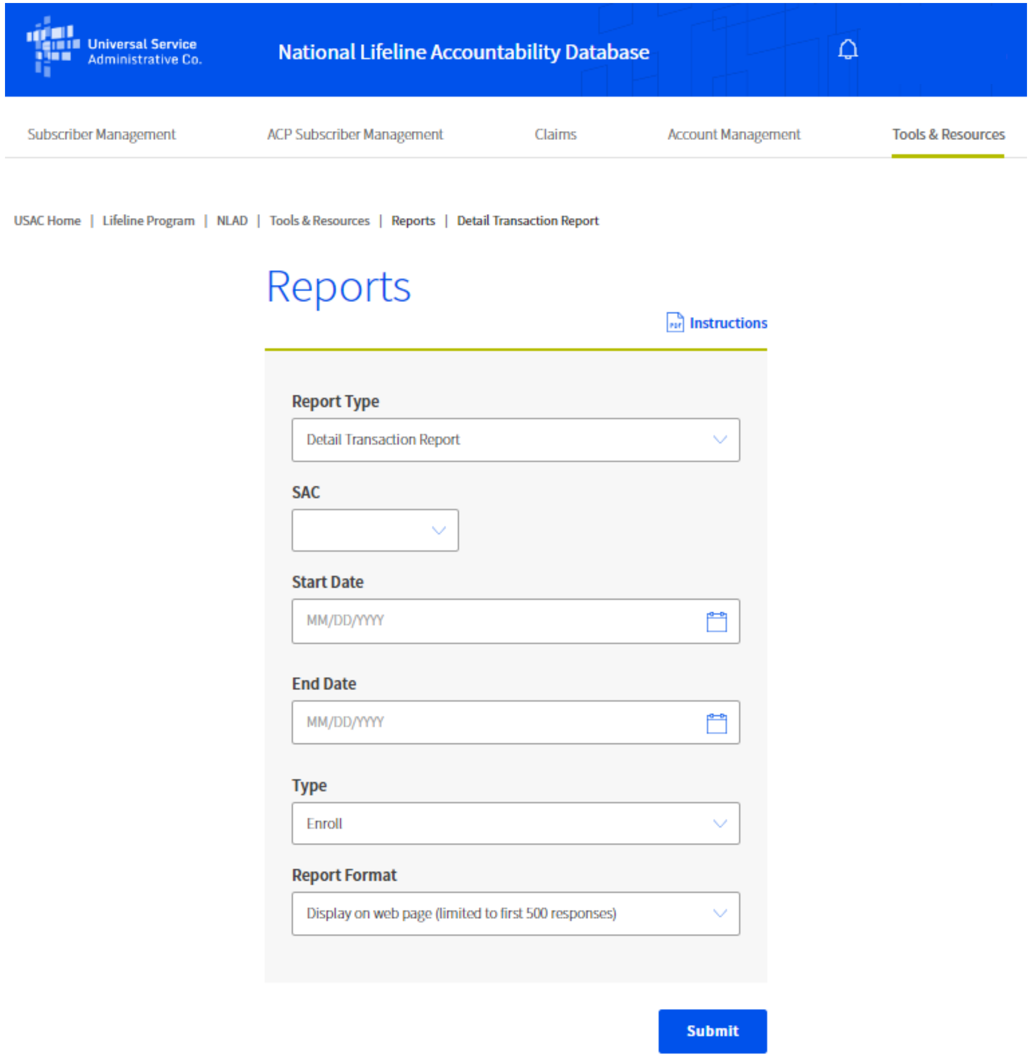
- Select the type of report you would like to review.
  - **Detail Reports**: Full records along with other relevant reporting fields.
  - **Summary Reports**: Records that fall within the specified parameters.
- Report data is limited to the Study Area Codes (SACs) and Service Provider Identification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

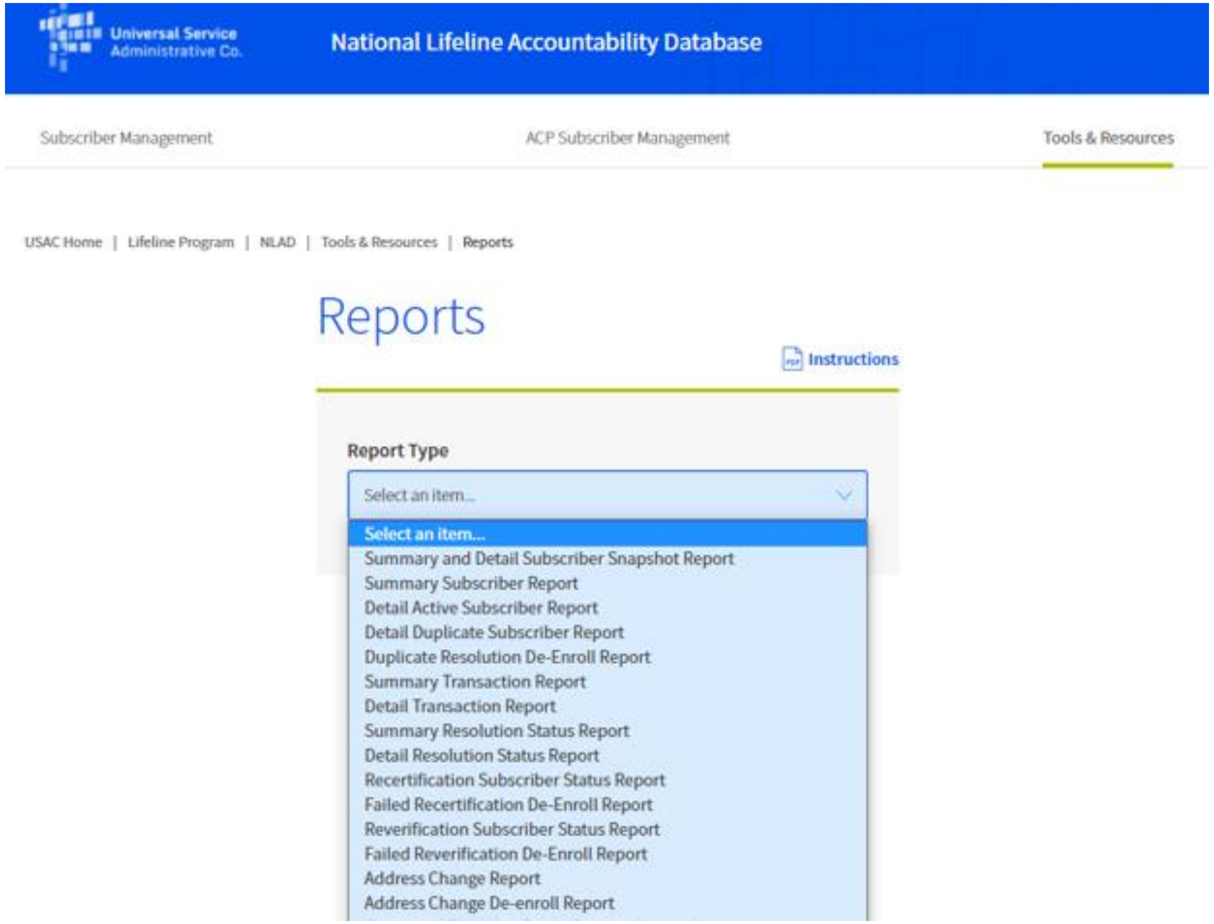


Reports

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.

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

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.

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
04/8/2024	ENROLL	04/08/24							BROADBAND
04/8/2024	ENROLL	04/08/24							BUNDLEDVOICEBROAD...

Show 25 records/page

1 of 1 pages

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.

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

Reverification Subscriber Status Report

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

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								PASS
2								PASS
2								PASS
3								PASS
2								PASS

Reports

Continued Eligibility Status Report

- This report displays 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									
In Progress									
In Progress									
Confirmed Eligibi...									

Poll

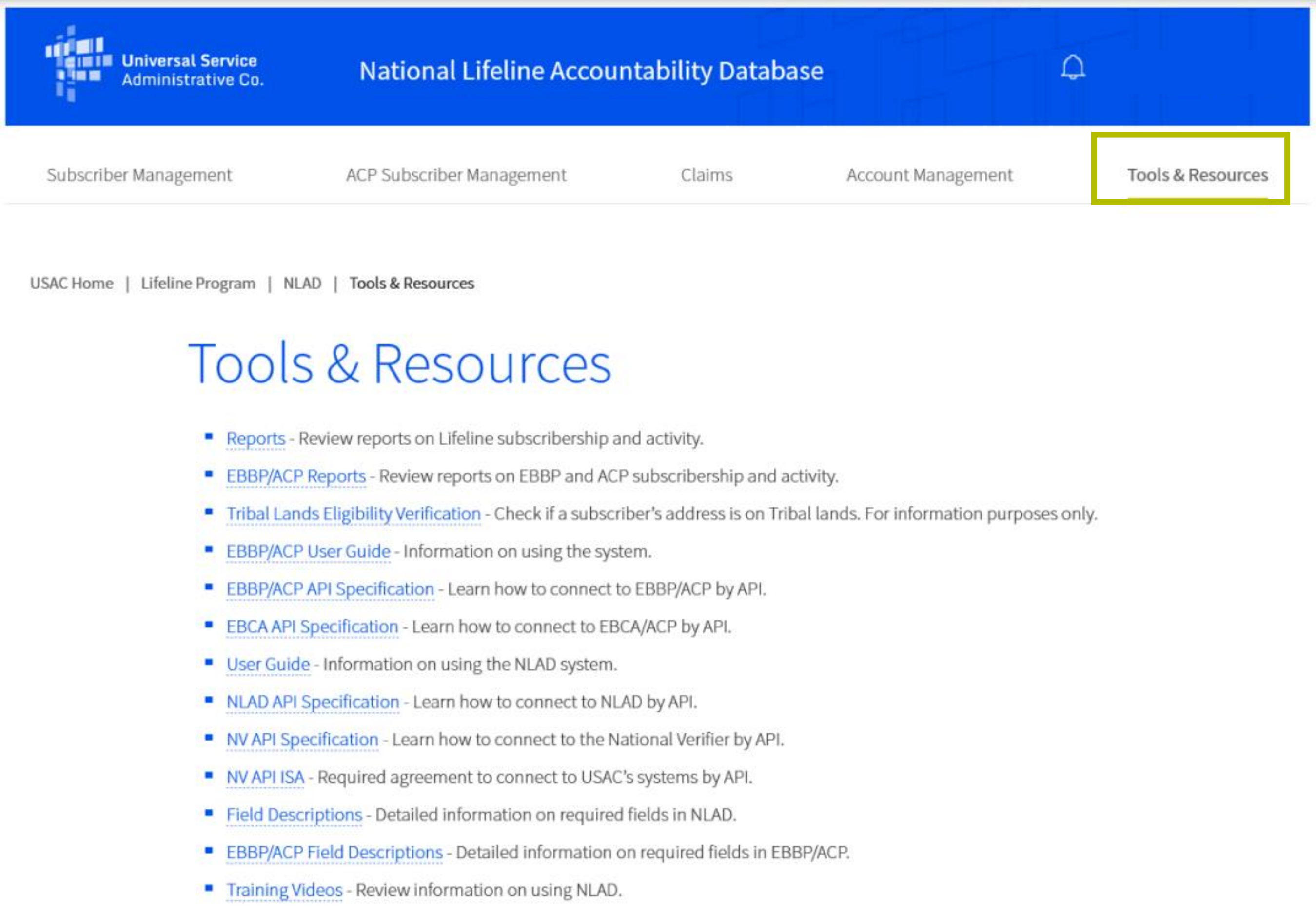
Questions?

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
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