National Verifier Training: Checking Lifeline Eligibility
Housekeeping

- Audio is available through your computer’s speakers
- The audience will remain on mute
- **Enter questions at any time using the “Questions” box**
  - There is a large audience signed in today. We will accept as many questions as possible!
- If your audio or slides freeze, restart the webinar
- **A copy of the slide deck is in the “Handouts” section of webinar panel**
National Verifier Training Refresher

  - Log in with NLAD credentials
  - Create NV-only credentials or bulk credentials
- Pre-Production Environment: [https://nationalverifiertraining.service-now.com/lifeline](https://nationalverifiertraining.service-now.com/lifeline)
  - February launch states added February 20
  - Pre-production user guide available
**Course Objectives**

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

...**be able to:**

- Navigate the National Verifier (NV) Provider Portal
- Assist a consumer with the eligibility application process through the National Verifier (NV) Provider Portal
- Assist a consumer with the paper eligibility application process

...**understand:**

- A consumer’s options for checking their eligibility
- Procedural guidelines (ex. responsibilities service providers have when supporting consumers in checking their eligibility / applying for Lifeline)
- The role of the Lifeline Support Center, service providers, and consumers in the eligibility process
- How to navigate common eligibility scenarios
Course Overview

01 | Introduction
   - Eligibility Check Overview

02 | Applying for lifeline with assistance from a service provider
   - Help a consumer apply via the National Verifier (NV) Provider Portal
   - Help a consumer apply using the paper application process
   - What are the service provider’s responsibilities?

03 | Summary
   - What are the key themes and takeaways?
Section 1: Introduction
With the introduction of the National Verifier (NV) System, the eligibility check processes have changed:

- The eligibility verification process has been streamlined. The National Verifier checks and determines a consumer’s Lifeline eligibility.

- Applicants can check eligibility directly via the National Verifier (NV) Web Portal, by mail, or with assistance from a service provider.

- Consumers can **check their application status online**. They can also contact the Lifeline Support Center to check their **application status** or their **enrollment status**.

It is important to note that the National Verifier will provide a centralized location for checking the eligibility of consumers. Consumers, however, must still be enrolled with a service provider in NLAD to start receiving Lifeline services.
Applying for Lifeline with Assistance from a SP
Enter Subscriber’s Information

The representative will ask the consumer for their information in order to enter it into the required fields.

Subscriber’s Information
We will use this information to find out if the subscriber qualifies for the Lifeline Program.

What is their full legal name?
The name they use on official documents, like their Social Security Card or State ID. Not a nickname.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Middle Name (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Suffix (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What is their date of birth?
Month | Day | Year
|------|----|-----
| MM  | DD | YYYY

What are the last 4 numbers of their Social Security Number (SSN)?

What is their home address?
The address where they will get service. Do not use a P.O. Box.

<table>
<thead>
<tr>
<th>Street Number and Name</th>
<th>Apt, Unit, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>123 Street Road</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>00000</td>
</tr>
</tbody>
</table>

Only the consumer’s legal name can be used and not a nickname.

What is your Tribal Identification Number? Give their Tribal Identification Number instead.

I want to give my Social Security Number instead.
Applying for Lifeline with Assistance from a SP
Select Qualifying Program(s)

The service provider representative will then select all programs that the consumer is already participating in that qualify them for Lifeline.

Tell Us Which Program They Are In

To qualify for Lifeline, we need to know which government assistance program the subscriber is in.

Are they in any of these?

Check all that apply.

- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program
- They don’t participate in one of these programs, and want to qualify through income
- They are not in any of these programs, but their child or dependent is (?)

The representative should check the box next to **all** the programs that the consumer is in.

Which tribal specific programs do they have? (Choose one.)

- Bureau of Indian Affairs General Assistance
- Tribally-Administered Temporary Assistance for Needy Families (TANF)
- Food Distribution Program on Indian Reservations (FDPIR)
- Tribal Head Start (only if they qualified for it through their income)

If the Consumer qualifies for Lifeline through an eligible child or dependent, the Service Provider will ask the Consumer for their Benefit Qualifying Person’s (BQP) information.
Applying for Lifeline with Assistance from a SP
Review Subscriber’s Information & Submit Application

The service provider representative and consumer have the opportunity to review the consumer’s information, and can edit it if necessary, prior to submitting the consumer’s information.

Review the Subscriber's Information
Before we check if they qualify for Lifeline, make sure they check and see that their information is right.

Double check the information below.

Full Legal Name: PA Person
Date of Birth: July 12, 1900
Last 4 Numbers of SSN: 1234
Address: 123 Fake Street
Gotham, PA 12345

Before the representative can click “Submit”, they must ask and obtain the consumer’s permission to the agreement statement.

Either the consumer or service provider representative can check the consent check box.
Applying for Lifeline with Assistance from a SP
Review Subscriber’s Information (with BQP)

Note: For subscribers applying through a Benefit Qualifying Person (BQP), the system will ask both the subscriber and the BQP to verify their legal information and to confirm that it’s ok to use this information to check for eligibility.

Review the Subscriber’s Information
Before we check if they qualify for Lifeline, make sure they check and see that their information is right.

Double check the information below.

<table>
<thead>
<tr>
<th>Full Legal Name:</th>
<th>PA Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth:</td>
<td>July 12, 1990</td>
</tr>
<tr>
<td>Last 4 Numbers of SSN:</td>
<td>1234</td>
</tr>
<tr>
<td>Child/Dependent’s Full Legal Name:</td>
<td>Junior Fake</td>
</tr>
<tr>
<td>Child/Dependent’s Date of Birth:</td>
<td>June 12, 2017</td>
</tr>
<tr>
<td>Child/Dependent’s Last 4 Numbers of SSN:</td>
<td>8889</td>
</tr>
<tr>
<td>Address:</td>
<td>123 Fake Street, Gotham, PA 12345</td>
</tr>
</tbody>
</table>

Ask the subscriber to confirm that it is okay for us to use their information to check if they qualify for Lifeline.

- By checking this box you are consenting that all of the information you are providing may be collected, used, shared, and retained for the purposes of applying for and/or receiving the Lifeline program benefit.
- By checking this box you are consenting that all of the information you are providing on behalf of a qualifying dependent may be collected, used, shared, and retained for the purposes of applying for and/or receiving the Lifeline program benefit.
NV will make the following verifications:

- **NLAD checks:**
  - Verify a consumer’s address through AMS
  - Verify a consumer’s identity through TPIV
  - Verify if a consumer is already enrolled or if someone at their address is already enrolled

- **Federal Data Sources**
  - HUD
Applying for Lifeline with Assistance from a SP
Subscriber’s Agreement

Next, the consumer’s agreement page will show. The representative must instruct the consumer to read and initial next to the following consent statements:

The representative cannot certify and consent on the subscriber’s behalf. The subscriber can only enter the two initials of their First and Last Name. The benefit recipient must be the one to initial with their initials, even when applying through a Benefit Qualifying Person (BQP).
Applying for Lifeline with Assistance from a SP
Subscriber’s Agreement

After the consumer initials next to the individual consent statements, they must write their name in order to sign the Application Form. Their typed name will act as an e-signature.

The system will limit the subscriber to enter their First and Last Name. Otherwise, the system will display an error message.

It is critical that the consumer understands and consents to the information on this tab. A person assisting a consumer to submit their Application Form cannot initial or enter the e-signature for the consumer.
Applying for Lifeline with Assistance from a SP
Eligibility Statuses

After submitting the application, the subscriber’s application will receive one of **four eligibility statuses**:

<table>
<thead>
<tr>
<th>Eligibility Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualified</td>
<td>Consumer passed all NLAD &amp; state validations and is eligible for Lifeline</td>
</tr>
<tr>
<td>Already Enrolled in Lifeline</td>
<td>Consumer record was found in state or federal data source and is already receiving a Lifeline Benefit</td>
</tr>
<tr>
<td>More Documentation Needed*</td>
<td>Consumer must upload documentation to dispute failures</td>
</tr>
<tr>
<td>Pending Review**</td>
<td>Consumer’s documents are being reviewed; application status will update in real-time</td>
</tr>
</tbody>
</table>

*Note: Consumers who receive a status of More Documentation Needed will be directed to dispute failures before proceeding to the Subscriber’s Agreement*

**Note: Consumers will only receive a status of Pending Review once they have uploaded documents to dispute failures**
Applying for Lifeline with Assistance from a SP
Consumer Passed NLAD & State/Fed Checks

The consumer will receive an eligibility status of “Qualified” if they passed all NLAD and State/Fed data source checks.

Eligibility Status: “Qualified”

They Qualify for Lifeline

You can enroll PA Person in the Lifeline Program

Next Steps

Use this information to enroll the subscriber in NLAD:

- **Full Legal Name:** PA Person
- **Address:** 123 Fake Street, Gotham, PA 12345
- **Application ID:** Q12230-29511

Need help? Call USAC at 1-877-432-1328

Once the service provider representative finishes assisting the consumer with checking their eligibility, the representative will see a message indicating the consumer’s eligibility status.

The representative can then **proceed to enroll the consumer in NLAD**. The consumer will need to enroll via NLAD within 90 days or their “Qualified” eligibility result will expire.

Consumers in batch states who pass NLAD and Federal data source checks will be immediately directed to this page.
Applying for Lifeline with Assistance from a SP
Consumer Failed One or More NLAD or State/Fed Checks

Eligibility Status: “Already Enrolled in Lifeline”

Our Records Show That The Subscriber Already Has Lifeline

If they don’t have a Lifeline benefit now, they had one in the past and are still in our system.

Let them know that these are their options:

Stay with their current Company
They do not need to do anything else here. But if they updated their address, they must notify their phone or internet company of their new address within 30 days.

Restart their service or cancel their benefit.
If they need to restart their service or want to cancel their benefit, they need to contact their current phone or Internet company.
If they don’t know what company is giving them service, they can log in to the Lifeline National Verifier consumer portal or call Lifeline Customer Service at 1-877-4LIFELINE.

Transfer their benefit.
If they want to transfer their Lifeline benefit to your company, you can log into NLAD and use the Transfer Lifeline Benefit feature to enroll the subscriber with your company.
Or they can find a new company using the list of phone or internet companies near them and ask them to transfer their service.

If the consumer thinks this is fraud, they should call USAC.
If they think this message is wrong, they should call Lifeline Customer Service at 1-877-4LIFELINE. For example:
• If they never had a Lifeline benefit and think someone else is using their information.
• If they think they already cancelled their benefit.

If the consumer received this eligibility status and would like to transfer their benefit, they are able to do so with their chosen new service provider.
Questions?
Eligibility Status: “More Documentation Needed”

If the Consumer receives a eligibility status of More Documentation Needed, they must upload documentation to dispute any of the following errors they may have received. For most of the following errors, the Lifeline Support Center will conduct a manual review of the submitted documentation.

<table>
<thead>
<tr>
<th>Error</th>
<th>Document/Proof Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMS (Address Matching Service Error)</td>
<td>Address validation</td>
</tr>
<tr>
<td>Duplicate Address</td>
<td>Duplicate address flow</td>
</tr>
<tr>
<td>Under 18</td>
<td>Proof of emancipated minor status</td>
</tr>
<tr>
<td>TPIV (Identity Verification Error)</td>
<td>Proof of identity</td>
</tr>
<tr>
<td>Program Eligibility</td>
<td>Proof of program/income eligibility</td>
</tr>
</tbody>
</table>

Note: A consumer can ask a service provider to help them submit documentation via their service provider NV Web Portal account.
Applying for Lifeline with Assistance from a SP
Upload Documents

If the consumer is not found in the applicable data source, the following screen will display.

We Could Not Confirm That They Are in One of These Programs
To qualify for Lifeline, the subscriber needs to give us more information.

Which program do they want to qualify through?
They will need to show proof that they are in the program they choose.
Choose one.
- SNAP (Supplemental Nutrition Assistance Program) or Food Stamps
- Medicaid
- Supplemental Security Income (SSI)
- Federal Public Housing Assistance
- Veterans Pension and Survivors Benefit Programs
- Tribal Specific Program (only choose if they live on tribal lands)
- They don’t participate in one of these programs, and want to qualify through income
- They are not in any of these programs, but their child or dependent is in one of these programs

Service providers will see this screen, which states that more information is needed from the consumer.

If the consumer is not found in the real time data source, they will need to choose a qualifying program and upload corresponding documents.

They will have 45 days to provide more documents so we can determine whether they qualify for Lifeline; if we don’t receive this information by 12/10/2018, they will need to come back to this site and fill this form out again.

Back

Next
Applying for Lifeline with Assistance from a SP Pending Review

Once the consumer has submitted documentation for review, the following screen will display.

We Are Checking Their Documents

We need to check their documents to make sure they qualify. When we finish, the status on your account dashboard will change.

This will take a few minutes.

Please come back when the status changes on your account dashboard.

The Lifeline Support Center hours are 9 a.m. - 9 p.m. ET, Monday - Sunday. If you’re using the system outside of those hours, please check back today or tomorrow morning after 9 a.m. ET to see if they qualify for Lifeline.

If they qualify...

You will have 90 days to enroll NC Person in NLAID.

If they do not qualify...

We’ll ask for more information or tell you what to do next. You will have until 12/9/2018 (Based on US Eastern Time) to send us the information or complete the next steps.

In the NV Provider Portal, the application status will appear as “Pending Review” until the Lifeline Support Center representative has finished their review and has updated the consumer’s status.

For applications that require more documentation, subscribers will have 45 days to submit documentation from the date of the initial application. Otherwise, a new application will need to be started.
Service providers can see the status of a consumer application on their home page:

Welcome Service Provider Agent

Pending Applications

Displaying 25 of 642 records

<table>
<thead>
<tr>
<th>Subscriber Name</th>
<th>Application ID</th>
<th>Application Created</th>
<th>Status</th>
<th>Failure Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA Person</td>
<td>Q97434-19793</td>
<td>08/29/2018 08:06:28</td>
<td>Pending Review</td>
<td>tvpiIdentity, Eligibility, InvalidAddress</td>
</tr>
<tr>
<td>NC PERSON</td>
<td>Q16232-36056</td>
<td>08/29/2018 08:05:15</td>
<td>More Documentation Needed</td>
<td>tvpiIdentity, Eligibility, InvalidAddress</td>
</tr>
<tr>
<td>North Carolina Test</td>
<td>Q68468-36835</td>
<td>08/29/2018 07:59:56</td>
<td>More Documentation Needed</td>
<td>tvpiIdentity, Eligibility, InvalidAddress</td>
</tr>
<tr>
<td>NC PERSON</td>
<td>Q61617-19693</td>
<td>08/28/2018 21:36:21</td>
<td>Pending Batch Decision</td>
<td>tvpiIdentity, Eligibility, InvalidAddress</td>
</tr>
</tbody>
</table>
Applying for Lifeline via the NV Web Portal

Check Status

• If a consumer needs to submit documentation and is waiting for an updated status from the Lifeline Support Center, the service provider can help a consumer check the status of a Lifeline application through the NV Provider Portal account or by calling the Lifeline Support Center.

   Lifeline Support Center (for SPs)
   1-877-524-1325
   Mon-Sun
   9:00 AM to 9:00 PM ET

• If a consumer has provided an email address, they will be contacted by email when there are any changes to their application. If no email has been provided, the consumer will be contacted by mail.
Questions?
Apply with a Paper Form

Required Fields

• Consumers must complete all sections of the application.

• Write clearly, using black ink and capital letters.

• Required fields include:
  • Full name, home address, whether the address is permanent or temporary, billing address (if different), date of birth, last four digits of SSN or Tribal identification number, and the name of the qualifying program or number of household members
Apply with a Paper Form
Qualification

- Applicants must show how they qualify for the Lifeline Program, either through a government program or based on their income.
- Only one method – an eligibility program or income eligibility – must be selected.
- The income table is based on 135% of the Federal Poverty Guidelines. This table is updated annually, typically in January.
- To decrease processing time, consumers can include copies of documentation with their application.
• Consumer must review and initial next to each statement

• Then, the consumer must sign and date the application at the bottom of the page

A service provider assisting a consumer cannot initial or sign for the consumer. The benefit recipient must be the one to initial with their initials, even when applying with a BQP.
Apply with a Paper Form
Representative Information

• This page is not required at this time
Apply with a Paper Form Submission

- Service providers should mail completed applications to:

  USAC Lifeline Support Center  
P.O. Box 7081  
London, KY 40742

- USAC will send an eligibility decision via email (if available) or mail.
- Eligibility decisions will be sent directly to the consumer.
- Most eligibility decisions will be made in 7 – 10 days.
- Consumers can call the Lifeline Support Center to check their application status at (800) 234-9473.
Questions?
Applying for Lifeline with Assistance from a SP
Service Provider Responsibilities

Service providers may assist consumers in checking their eligibility through the National Verifier.

Service providers are **able to aid** consumers by:

- Helping consumers understand their responsibilities as a Lifeline benefit recipient
- Providing instructions and guidance
- Providing consumers with a means to use the NV Web Portal or provide printed forms to complete an application and/or check the status of their eligibility
- Assisting consumers in their application through the service provider representative’s own NV Web Portal account as long as the consumer is present in person to give their consent on the certification and consent fields, and provides their e-signature

Service providers are **unable to aid** consumers by:

- Entering a consumer’s information without their consent
- Signing a consumer’s consent and certification statements
- Submitting false documentation and information on the consumer’s behalf
- Claiming to verify a consumer’s eligibility and promising the consumer the Lifeline benefit prior to verification
- Writing down, copying, or saving the consumer’s PII
Section 3: Summary
Lesson Summary
Key Takeaways and Tips

In this section, you have learned:

• **A service provider representative can use their existing NLAD credentials** in order to access the NV Web Portal.

• Some of the participating states will use **real-time data systems**, which means that a **consumer application can have near real-time response on a consumer’s eligibility**.

• If a service provider collects a consumer's paper application, **they must submit that application to the Lifeline Support Center**. They cannot enter the consumers information into the service provider portal.

• **A service provider representative can assist a consumer** submit their Application Form via their own NV Provider Portal account.

• If necessary, a service provider can help the consumer **to submit more documentation** to verify their eligibility depending on their error type.

• A service provider is also able to **provide consumers with information and guidance to apply for Lifeline**, and help consumers **understand their responsibilities as Lifeline benefit recipients**.

• A service provider **cannot sign a consumer’s consent and certification statements** on the consumer’s behalf.
Questions?
Looking Ahead
National Verifier Training and Support

Trainings for February Launch:

- **February 21**: Correcting Errors & Submitting Documents
- **February 26**: Pre-production Workshop
- **March 7**: NV Processes for SPs without the SP Portal

Office Hours for February Launch:

- **February 19**: Topic TBD

* Please note, USAC will add additional office hours as needed/requested.*
Thank You!

• Thank you for joining us!

• If you received this webinars training invitation from another member of your team or know of others who should receive training invitations please email us at LifelineProgram@usac.org to be added to the National Verifier training and outreach list for these states.

• Sign up for Lifeline Program email updates and upcoming events
  • Visit usac.org/li and click “Subscribe” in the upper right hand corner

• Need help? Contact us!
  • General: LifelineSupport@usac.org
Appendix
# Introduction

## Key Definitions and Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply / Check Eligibility</strong></td>
<td>Consumer submits their Application Form via the NV Web Portal, mail, or with assistance from a service provider (SP) to determine their Lifeline eligibility</td>
</tr>
<tr>
<td><strong>Benefit Qualifying Person (BQP)</strong></td>
<td>The person in the consumer’s household who is eligible for Lifeline Program benefits when the consumer does not qualify. Typically, this person qualifies for Lifeline Program benefits, but cannot subscribe to a carrier on their own, and is a dependent of the consumer</td>
</tr>
<tr>
<td><strong>Document Submission</strong></td>
<td>Consumer submits copies of official documents that prove their identity, eligibility status, or address using the NV Web Portal or mail</td>
</tr>
<tr>
<td><strong>Enroll</strong></td>
<td>After being deemed eligible, the consumer contacts a participating service provider to start receiving their Lifeline service and benefit.</td>
</tr>
<tr>
<td><strong>Hard Error</strong></td>
<td>A problem with a consumer's Lifeline application that prevents it from being submitted. For example, entering a number into the &quot;Name&quot; field. Hard errors can be resolved by fixing or re-entering the information.</td>
</tr>
<tr>
<td><strong>Household Worksheet</strong></td>
<td>This worksheet must be submitted in cases when multiple eligible consumers who are not part of the same household or family live at the same address</td>
</tr>
<tr>
<td><strong>IVR (Interactive Voice Response)</strong></td>
<td>Automated system that allows humans to interact with a computer over the phone, through the use of voice, touchpad, and dialing</td>
</tr>
</tbody>
</table>
# Introduction

## Key Definitions and Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lifeline Navigator</strong></td>
<td>A person who assists eligible consumers when applying for Lifeline</td>
</tr>
<tr>
<td><strong>Lifeline Support Center</strong></td>
<td>Responsible for conducting manual eligibility reviews and operating the consumer call center</td>
</tr>
<tr>
<td><strong>National Verifier (NV) Web Portal</strong></td>
<td>The National Verifier's website. A one-stop-shop where users can log in to check eligibility for Lifeline, view application status, resolve problems, and receive notifications.</td>
</tr>
<tr>
<td><strong>NLAD (National Lifeline Accountability Database)</strong></td>
<td>The NLAD system is the repository for enrolling consumers in the Lifeline program after their eligibility has been verified through the NV. NLAD initiates recertification and helps service providers initiate eligibility checks for benefit transfers and claim current consumers for facilitating disbursements.</td>
</tr>
<tr>
<td><strong>Personally Identifiable Information (PII)</strong></td>
<td>Any information about an individual that can be used to distinguish or trace an individual’s identity either alone or when combined with other information that is linked or linkable to a specific individual. Examples include name, social security number, date and place of birth, etc.</td>
</tr>
<tr>
<td><strong>Soft Error</strong></td>
<td>An error in a submitted application that can be addressed through document submission</td>
</tr>
</tbody>
</table>