

March 2021 Monthly Webinar

NLAD 101

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 webinar panel

Meet Our Team



Tiffany BradyManager of Communications | Lifeline

Tiffany manages all communications for Lifeline, including state and federal partnerships



Linnita Hosten

Senior Communications Specialist | Lifeline

Linnita develops external communications and creates content about Lifeline systems and program changes

Objectives

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



...be able to:

- Navigate the National Lifeline Accountability Database (NLAD)
- Define general terms used in NLAD
- Enroll a subscriber in NLAD



...understand:

- The high-level functionality of the (NLAD) system
- The different types of NLAD user accounts
- The role and responsibility of service providers when using NLAD

Agenda

- Program Updates
- NLAD Overview
- Resources

COVID-19 Relief Extended

On February 24, 2021, the <u>FCC released a waiver</u> to ensure low-income consumers continue to have access to affordable communications services needed for telemedicine, telework, and online learning during the ongoing COVID-19 health emergency.

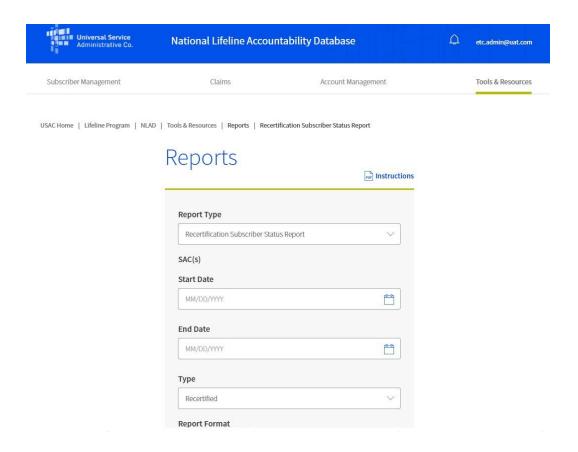
From now through **June 30, 2021**:

- Recertification is on hold for all subscribers with anniversary dates between April 14, 2020, and September 28, 2021
- Reverification activity is on hold
- Consumers will continue to have flexibility related to the documentation they can use to demonstrate income eligibility
- Additional information is available on USAC's <u>Lifeline COVID-19 Response</u> web page

Note: The existing waiver for subscriber usage requirements will only be extended through May 1, 2021

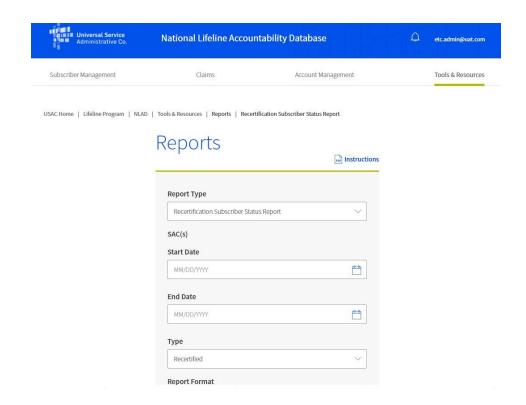
Updated NLAD Recertification Subscriber Status Report

- In mid February, USAC updated Lifeline's Recertification Subscriber Status Report
- Service providers can now reference the recertification reports in NLAD for up-to-date information on their subscribers' recertification status



Updated NLAD Recertification Subscriber Status Report

- Minor updates to the Recertification Subscriber Status Report will allow service providers to:
 - See only one recertification record per anniversary date selected, for each subscriber
 - Pull the same parameters with the same anniversary date for the previous year. This would allow them to see the previous recertification activity



- General Information
- Terms to Know
- NLAD Account Types
- Service Provider Responsibilities
- Subscriber Management Overview
- Enrolling Subscribers
- Error Codes

General Information

NLAD is the system that service providers use to manage their Lifeline subscribers, including enrolling consumers in the program, transferring subscribers, and reviewing reports about their Lifeline subscribers

- Note: CA, OR, and TX do not use NLAD
 - Service providers in these states use the states' existing processes to enroll consumers, except for broadband-only consumers in California
 - Exception: Standalone broadband consumers in California are verified by the National Verifier and enrolled in NLAD

Terms to Know



Enrollment: Add subscribers to NLAD to claim reimbursement

 To enroll a consumer in NLAD, they must have an approved eligibility decision from the National Verifier before they can be enrolled in NLAD

Terms to Know



The day after a data month ends (i.e., the first day of the next month), NLAD takes a "snapshot" of all of the subscribers that are entered into NLAD

- The snapshot is a record of exactly which subscribers are entered in NLAD at that time
- The subscribers included in the "snapshot" are the population that is eligible for reimbursement

Terms to Know

National Verifier: Lifeline's application system used to determine consumer eligibility for the Lifeline program

Consumers follow a two-step process to apply for the Lifeline benefit:

- 1. Consumer applies to the program through the National Verifier
- 2. Service provider enrolls the consumer in the program using NLAD

Terms to Know

National Verifier Mode

All transactions in NLAD take place through the National Verifier workflow and subscribers' eligibility is routinely confirmed during enroll, transfer, update, and verify transactions

National Verifier Mode



Note: There may be limited waivers or exceptions that permit a service provider to use NLAD's legacy mode and perform transactions without verifying a subscriber's eligibility in the National Verifier prior to enrollment.

Terms to Know



NLAD Accounts refer to the account types that are created in NLAD which allow users to log into NLAD and/or the National Verifier and perform a variety of functions

The number of functions can vary based on the type of account

497 Officer and ETC Administrator



497 Officer: A user with the responsibility of filing and certifying reimbursement claims for the Lifeline program

 497 Officers can assign or create a NLAD ETC Administrator and create and view reports

ETC Administrator: A user with permissions to manage subaccounts (ETC Analyst, Operations, and Agent), including updating account information, resetting account passwords, and deactivating accounts

 ETC Administrators can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests

Subaccounts



ETC Analyst: A user that can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests

ETC Operations: A user that can only query subscriber data, create and view reports, and submit resolution requests

ETC Agent: This user only has access to the National Verifier to perform transactions such as eligibility checks

NLAD Access

NLAD Access							
Account Type	Create/Manage ETC Admin	Create/Manage Subaccounts (ETC Analyst, Ops, & Agent)	Perform Subscriber Transactions	Query Subscriber Data	Create/View Reports	Submit Resolution Requests	
497 Officer	X				X		
ETC Administrator		X	X	X	X	Х	
ETC Analyst			X	Χ	X	Х	
ETC Operations				X	X	Χ	
ETC Agent*							

^{*}ETC Agents do not have access to NLAD

National Verifier Access

National Verifier Access							
Account Type	Check Eligibility	Upload Supporting Documents	View Dashboard of Applications Submitted for Review				
497 Officer*							
ETC Administrator	X	X	X				
ETC Analyst	X	X	X				
ETC Operations	X	X	X				
ETC Agent	X	X	X				

^{*497} Officers do not have access to the National Verifier

Service Provider Responsibilities

Service Provider Responsibilities

Keep NLAD Up-to-Date



- The FCC's Lifeline program rules require all service providers to keep NLAD up-to-date:
 - 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

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 <u>RAD</u> <u>Resources</u> page

Subscriber Management Overview Logging In

- Log into <u>OnePortal</u> with your user name and password
- Accept USAC's system policy



Username

•••••

Password

•••••

Forgot password?

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary and/or legal action.

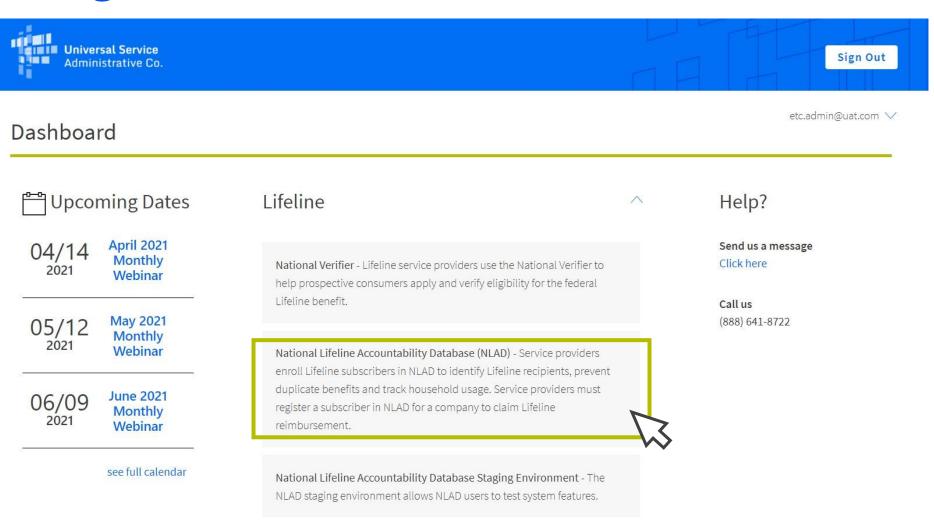
Click the box to accept

By signing in, I accept the terms and conditions of the USAC system.

Sign In

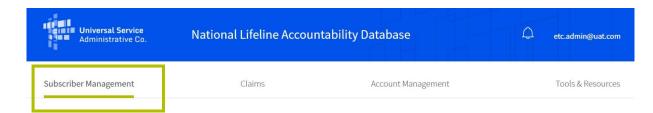
Don't have an account? Create an account

Logging In



NLAD Home Page

- The home page will differ depending on the user's assigned role in NLAD
- Users can perform any action listed under the Subscriber Management menu
- Today's webinar will focus on the functions included under the "Subscriber Management" menu



USAC Home | Lifeline Program | NLAD | Subscriber Management

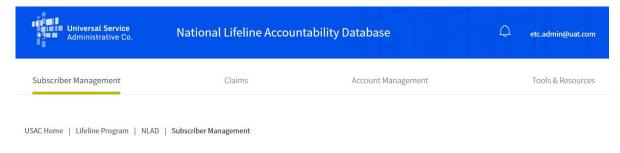
Subscriber Management

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

NLAD Subscriber Management Menu Options

- Enroll Subscriber: Add a new Lifeline subscriber to NLAD
- Transfer Lifeline Benefit: Transfer the subscriber's Lifeline benefit from their current service provider to your company. The consumer must have a qualified application in the National Verifier to be eligible for transfer
- Update Subscriber: Update/change an existing subscriber's information



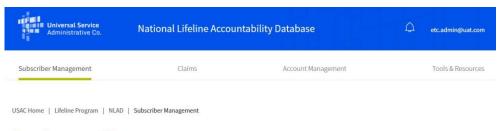
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NLAD Subscriber Management Menu Options

- Upload Subscriber File: Complete many transactions at once (bulk upload) using the National Verifier NLAD Input Template
- De-Enroll Subscriber: Remove a subscriber from NLAD
- Lookup Subscriber: Check if a potential subscriber (or someone at their address) already exists in NLAD
- Submit Resolution Request: Provide details to resolve an enrollment error



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

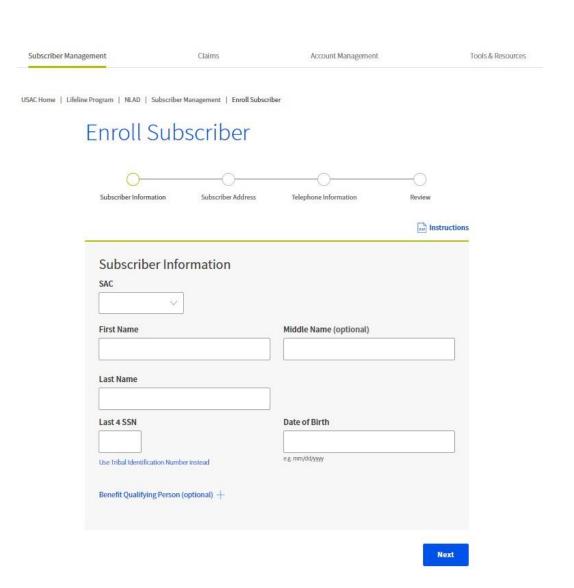
- Enroll Subscriber Enroll a qualified subscriber in the Lifeline Program. Also used to verify a subscriber's eligibility and enrollment status.
- Transfer Lifeline Benefit Transfer a qualified subscriber's benefit to your company.
- Update Subscriber Update an existing subscriber's NLAD record.
- Upload 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.





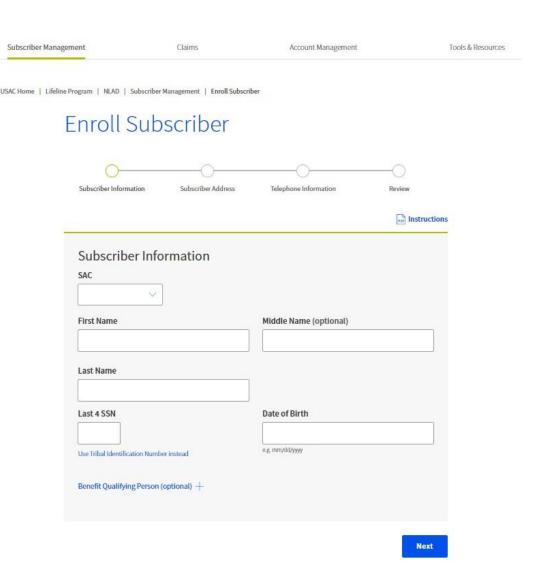
From the **Enroll Subscriber** page, users can:

- Verify that a subscriber is able to be enrolled
- Enroll a subscriber in NLAD
- Confirm Link Up eligibility



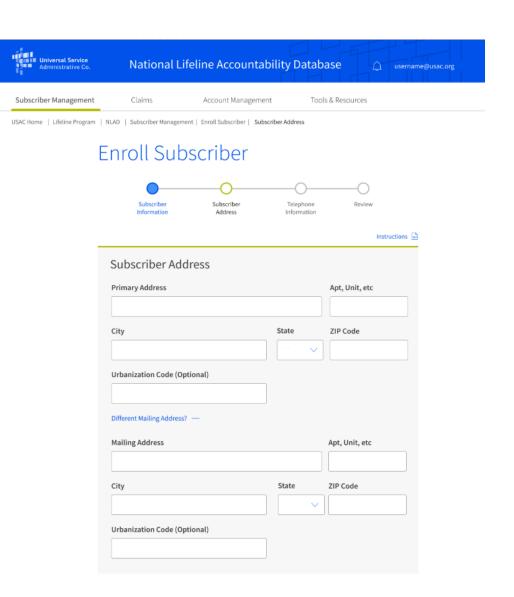
Enter Subscriber Information

- SAC: A six-digit number associated with the Eligible Telecommunications Carrier (ETC) providing the Lifeline benefits to the subscriber
- Name: Subscriber's full legal name
- Last 4 SSN: Subscriber's last four digits of their social security number (or Tribal ID)
- Date of Birth: Subscriber's date of birth
- BQP: "Benefit qualifying person;" only include this information if the applicant is qualifying through their child or dependent



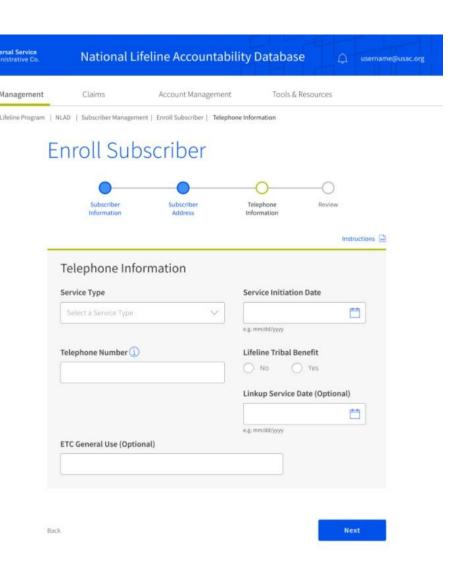
Enter Subscriber Address

- Primary Address: Subscriber's primary residential address (cannot be a PO Box)
- Mailing Address: Subscriber's mailing address, if different from their primary address



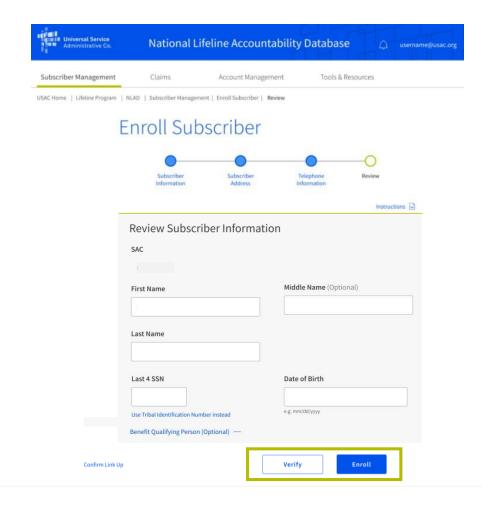
Enter Service Information

- 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)
- 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



Enrolling SubscribersReview Subscriber Information

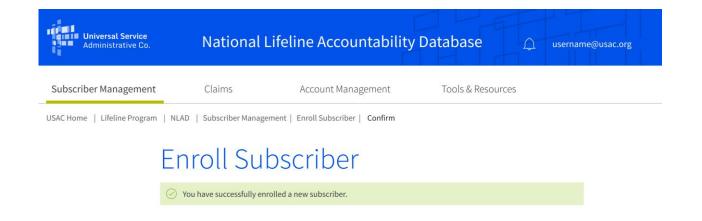
- Verify: button that allows a service provider to check for errors or issues that would prevent a successful enrollment
- Enroll: button that allows a service provider to add a subscriber to NLAD



Enrolling Subscribers

Example of Successful Transaction

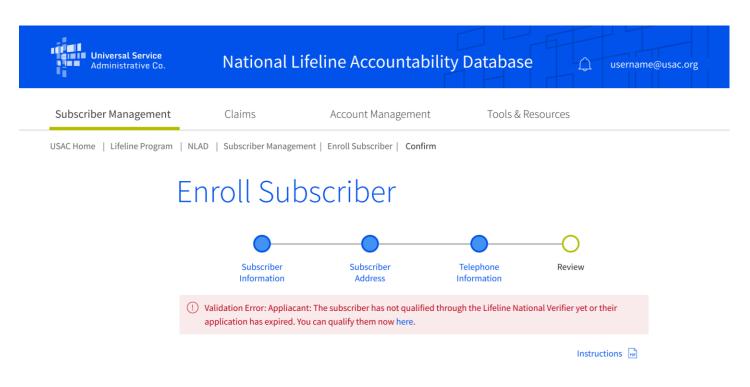
- A subscriber can be enrolled if they have:
 - Qualified through the National Verifier,
 - Are not already receiving a benefit, and
- When all of the above have been met, a service provider will receive this success screen, indicating successful enrollment in NLAD



Enroll Subscribers

Example of Failed Transaction

- A subscriber cannot be enrolled if the information entered in NLAD does not match information entered in the National Verifier or if they have not qualified through the National Verifier
- The error message provides the error type, and the reason for the failure



Enrolling Subscribers

Upload Subscriber File

- Users may add or update multiple subscribers at once using the <u>National Verifier</u> <u>NLAD Input Template</u> available on the <u>NLAD Resources</u> page
- Review what each field means and which fields are required by downloading the <u>National Verifier NLAD Input Templates Field Names and Descriptions</u>



Enrolling Subscribers

NLAD Application Program Interface (API)

- The NLAD Application Program Interface (API) is another connection option
- The NLAD API allows service providers to connect their billing or customer management system directly to NLAD so that their system can send enrollments or other transactions and pull reports automatically
 - For example, a service provider captures a consumer's enrollment in their own billing system, and the billing system sends the enrollment to NLAD

Third Party Identity Verification (TPIV)

If a consumer has an application in the National Verifier with unresolved <u>TPIV errors</u>, NLAD will return the unresolved errors in this format. These error messages are:

Error Code	Description	Address the error:
TPIV_FAIL_IDENTITY_NOT_FOUND	The subscriber's identity could not be found	This error will need to be resolved by submitting documentation to the National Verifier
TPIV_FAIL_NAME_SSN4	The subscriber's full name and/or SSN4 could not be validated	This error will need to be resolved by submitting documentation to the National Verifier
TPIV_FAIL_DOB	The subscriber's date of birth could not be validated	This error will need to be resolved by submitting documentation to the National Verifier
TPIV_FAIL_DECEASED	The subscriber is identified as deceased	This error will need to be resolved by submitting documentation to the National Verifier

Address

If a consumer has an application in the National Verifier with an unresolved <u>United States Postal Service's Address Matching Service (AMS)</u> error, NLAD will provide the following error message:

Error Code	Description	Address the error:
INVALID_ADDRESS	Address unrecognized	This error will need to be resolved by submitting information to the National Verifier

Error CodesSubscriber Under 18

If a consumer has an application in the National Verifier with an unresolved <u>under</u> <u>18 years of age error</u>, NLAD will provide the following error message:

Error Code	Description	Address the error:
SUBSCRIBER_UNDER_18	No subscriber can be less than 18 years of age	This error will need to be resolved by submitting documentation to the National Verifier

Duplicate

If a consumer's information is found as a duplicate in the National Verifier or NLAD, NLAD will provide the following error messages:

Error Code	Description	Address the error:
DUPLICATE_ADDRESS_NLAD	The primary address in this transaction matches the primary address of another subscriber	This error will need to be resolved by submitting documentation to the National Verifier

Error Codes Duplicate

Error Code	Description	Address the error:
DUPLICATE_PHONE_NUMBER	The phone number in this transaction matches the phone number of another subscriber	Confirm the phone number is not already assigned to a consumer
DUPLICATE_SUBSCRIBER_NLAD	The subscriber in this transaction is a duplicate of another subscriber	Obtain consent to transfer the subscriber's Lifeline Program benefit and completing a benefit transfer in NLAD

Specific to National Verifier Workflow

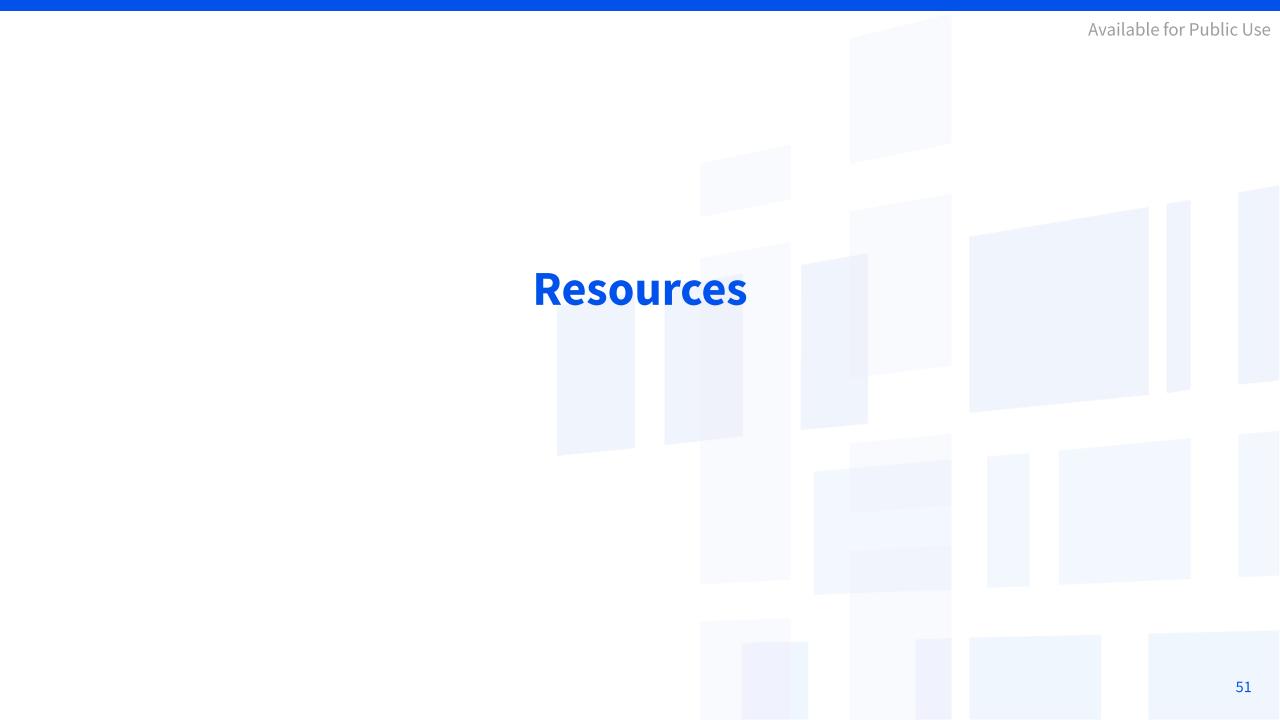
Error Code	Description	Address the error:
APPLICATION_NOT_FOUND	The subscriber has not qualified through the Lifeline National Verifier yet or their application has expired	Confirm that the PII submitted in NLAD is exactly what the customer submitted when they applied. If the customer has not yet applied, tell them to do so or help them using the service provider portal
APPLICATION_NOT_COMPLETE	The subscriber has not finished qualifying through the National Verifier	Any documentation that the customer needs to submit to resolve errors will be listed. You can assist the customer through the National Verifier service provider portal
APPLICATION_PENDING	The subscriber's application is currently under review	For more information please contact USAC at <u>LifelineProgram@usac.org</u>

Error CodesTribal Benefit

Error Code	Description	Address the error:
TRIBAL_BENEFIT_FLAG_NONTRIBAL	The consumer does not live on Tribal lands and is not eligible for the enhanced benefit	The consumer must be enrolled without the Tribal lands flag to receive Lifeline-supported service
TRIBAL_BENEFIT_FLAG_DEFICIENT	The consumer does not yet have a qualified application in the National Verifier for this transaction	If it is an enrollment/transfer , the consumer must finish qualifying. If it is an update , the consumer must complete an address update in the National Verifier portal, or the service provider should assist the consumer to start a new application and resolve the address errors.
TRIBAL_BENEFIT_FLAG_NONTRIBAL	The consumer has a qualified application in the National Verifier, but the latitude and longitude provided indicate they do not reside on Tribal lands, or the lat/long provided are not in the same state as the subscriber's residential address	Contact <u>LifelineProgram@usac.org</u> to request additional information and to enable the consumer to provide more accurate address details if applicable.



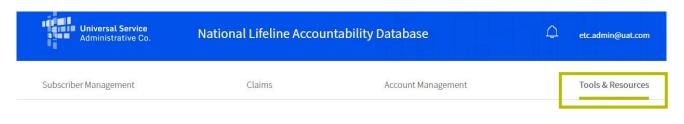




Resources

Resources are accessible in the NLAD mega menu under *Tools & Resources*:

- NLAD User Guide
- API Specifications
- & more



USAC Home | Lifeline Program | NLAD | Tools & Resources

Tools & Resources

- Reports Review reports on Lifeline subscribership and activity.
- Tribal Lands Eligibility Verification Check if a subscriber's address is on Tribal lands. For information purposes only.
- User Guide Information on using the NLAD system.
- NLAD API Specification Learn how to connect to NLAD by API.
- NV API Specification Learn how to connect to the National Verifier by API
- NV API ISA Required agreement to connect to USAC's systems by API.
- Field Descriptions Detailed information on required fields in NLAD.
- Training Videos Review information on using NLAD.

NLAD Resources



- More information can be found on the <u>NLAD section</u> of our website, including:
 - National Verifier NLAD Input Templates Field Names and Descriptions,
 - NLAD Maintenance Schedule and Release Notes



 Contact <u>LifelineProgram@usac.org</u> for technical questions and assistance and general NLAD inquiries



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