National Verifier System Overview Training

January 14, 2020

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**
    - 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 today's presentation is available in the handouts section

Today’s Presenters

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Course Objective

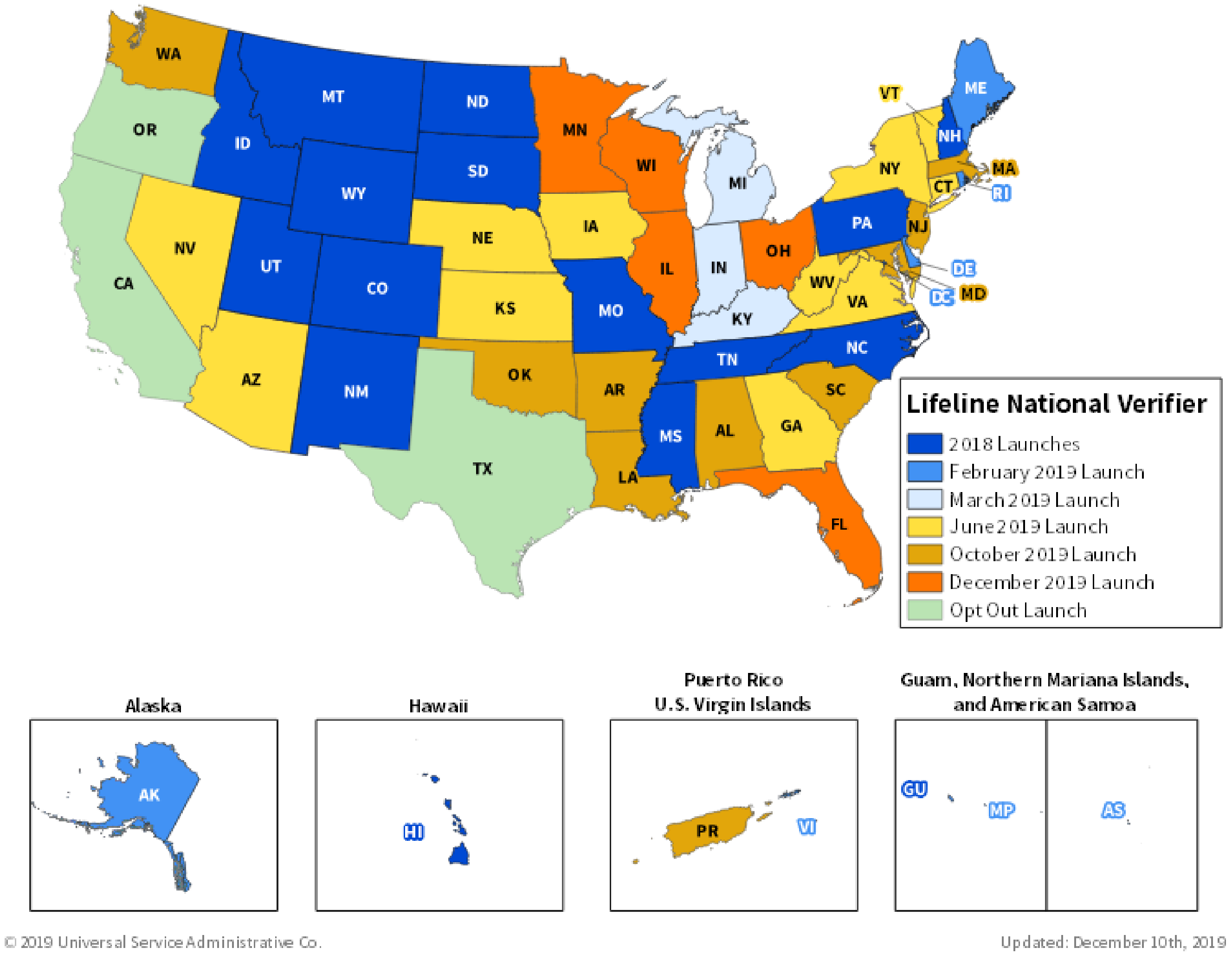
- An overview of the National Verifier system, including:
  - Creating User Accounts and Credentials
  - Creating an NV Application
  - Checking the Status of an Application
  - Submitting Documentation
  - NLAD & the National Verifier

Introduction

National Verifier Overview

The **December 2019** group soft launched on December 16. This includes:

- Florida
- Illinois
- Minnesota
- Ohio
- Wisconsin



National Verifier Overview

- The National Verifier will determine consumer's Lifeline eligibility
- Service providers will no longer determine if consumers are eligible for Lifeline
- The National Verifier will make eligibility determinations, then service providers must enter a consumer in NLAD to enroll in Lifeline
- The National Verifier will handle the annual recertification process

National Verifier Overview

- When the National Verifier launches in a state there is an **optional soft launch** period followed by a mandatory hard launch
- At the **hard launch**, consumers in a state can apply directly through the National Verifier
- When a state enters the National Verifier, all current Lifeline consumers go through a one-time **reverification** process that ensures they meet all Lifeline requirements

Get Started

Get Started
Creating User Accounts and Credentials

Service provider administrators (ETC Admins) can grant National Verifier service provider portal access to their employees using the NLAD system. The following guidance applies to all service providers:

- Each National Verifier user must have unique login credentials. **Users are not permitted to share accounts.**
- **Service providers with NLAD credentials can use the same credentials** to access and use the National Verifier service provider portal.
    - NLAD's existing user permissions are not changing.
    - Anyone with NLAD access will have National Verifier access.
- **A new account category has been created (ETC Agent)** for sales associates who will access to the National Verifier service provider portal but do not need NLAD access.
- **USAC has removed the limit on how many NLAD sub-accounts a service provider can create**.
- USAC will track account activity in the NV service provider portal.

Get Started
Creating User Accounts and Credentials

There are **four** different types of service provider user accounts within NLAD that map to two NV service provider portal account types.

		NV SP Portal Permissions			
NLAD Account Types	**NV SP Portal Account Types**	**NLAD Access**	**Check Eligibility**	**Upload Supporting Documents**	**View Dashboard of Applications Submitted for Review**
ETC Admin	**ETC Admin**	X	X	X	X
ETC Analyst					
ETC Ops					
ETC Agent	**ETC Agent**		X	X	X

Get Started
Creating User Accounts and Credentials

The process for creating NV credentials is same the same as creating NLAD sub-accounts:

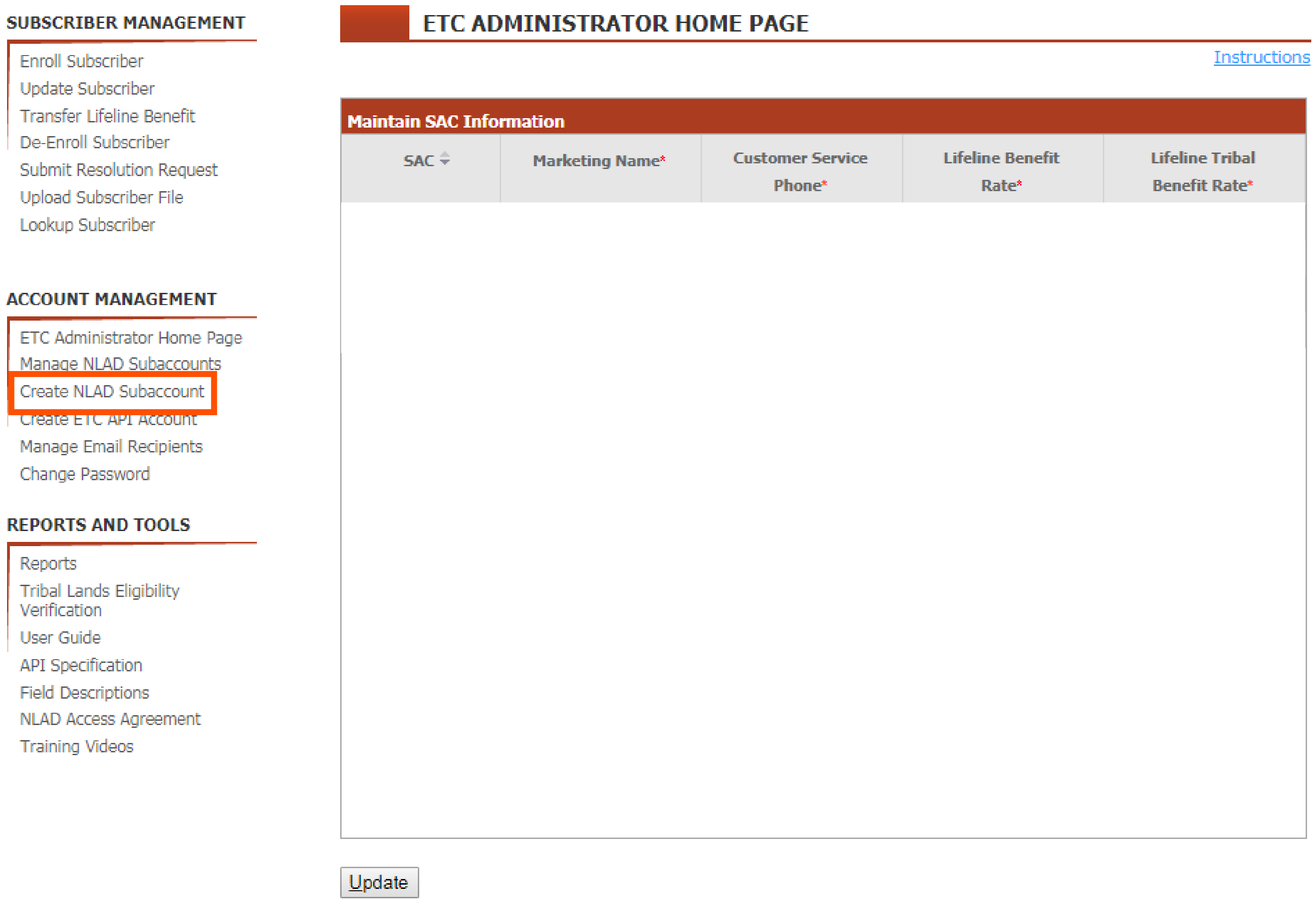
1. In NLAD, **select the "Create NLAD Subaccount"** link in the **"Account Management"** menu on the left.
2. **Enter the user's email address** (required).
3. **Click "Search"** to locate the user information. If an account is found matching that email address, skip to step 5.
4. If no matching account was found, **enter the new user's information**.
5. **Select the desired role for the account from the "NLAD Role"** drop-down menu (i.e. ETC Agent) and **click "Submit"**.

Full video demonstrations available here:

- https://www.usac.org/video/li/nlad/nlad-admin-create-sub-accounts/index.html
- https://www.usac.org/video/li/nlad/nlad-497-officer-create-admin/index.html

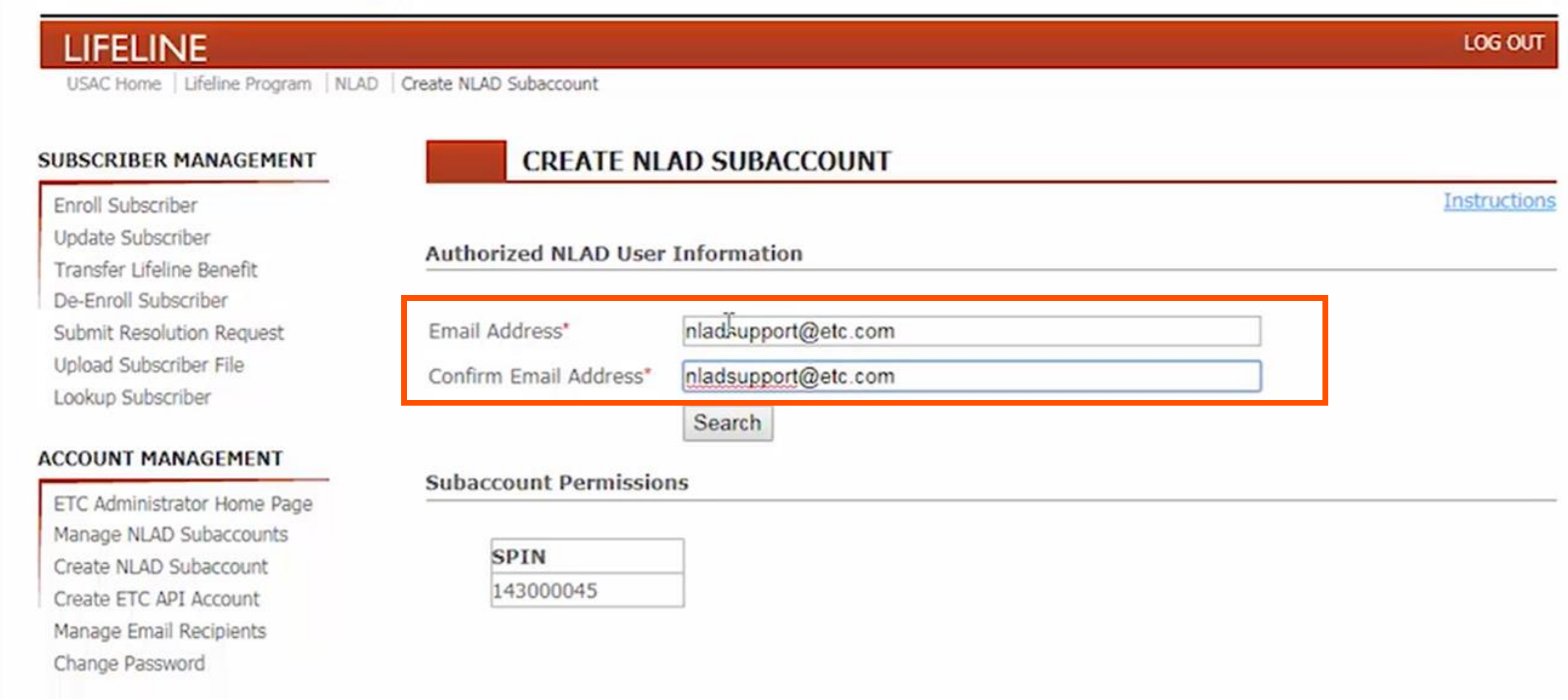
Get Started
Step 1: Create NLAD Sub-account

In NLAD, the ETC Admin user will navigate to the “Account Management” tab, and click “Create NLAD Subaccount”.



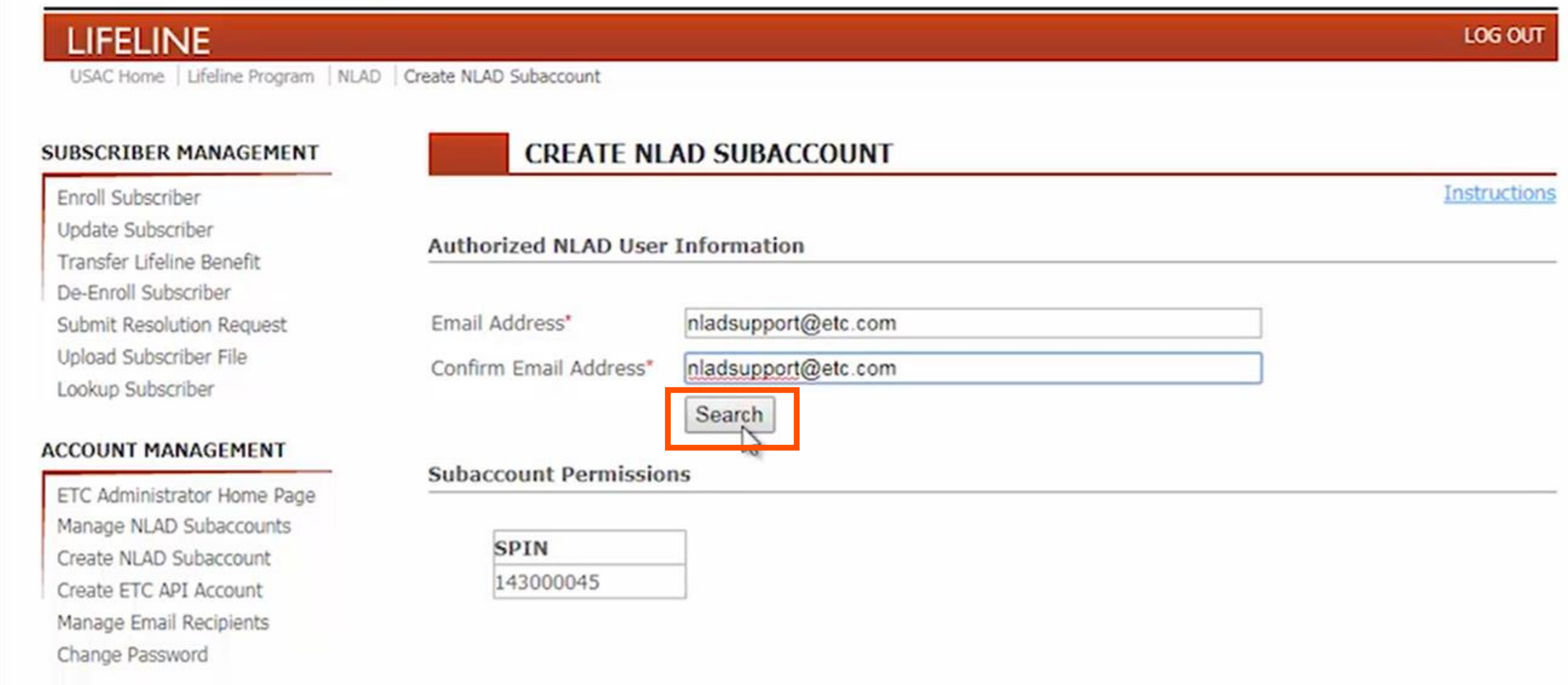
Get Started
Step 2: Enter E-mail Address

The ETC Admin user will enter the desired user's email address.



Get Started
Step 3: Search for User Information

After entering the desired user’s email address, the ETC Admin will click “Search” to locate the user’s information. If their information is found, skip to Step 5.



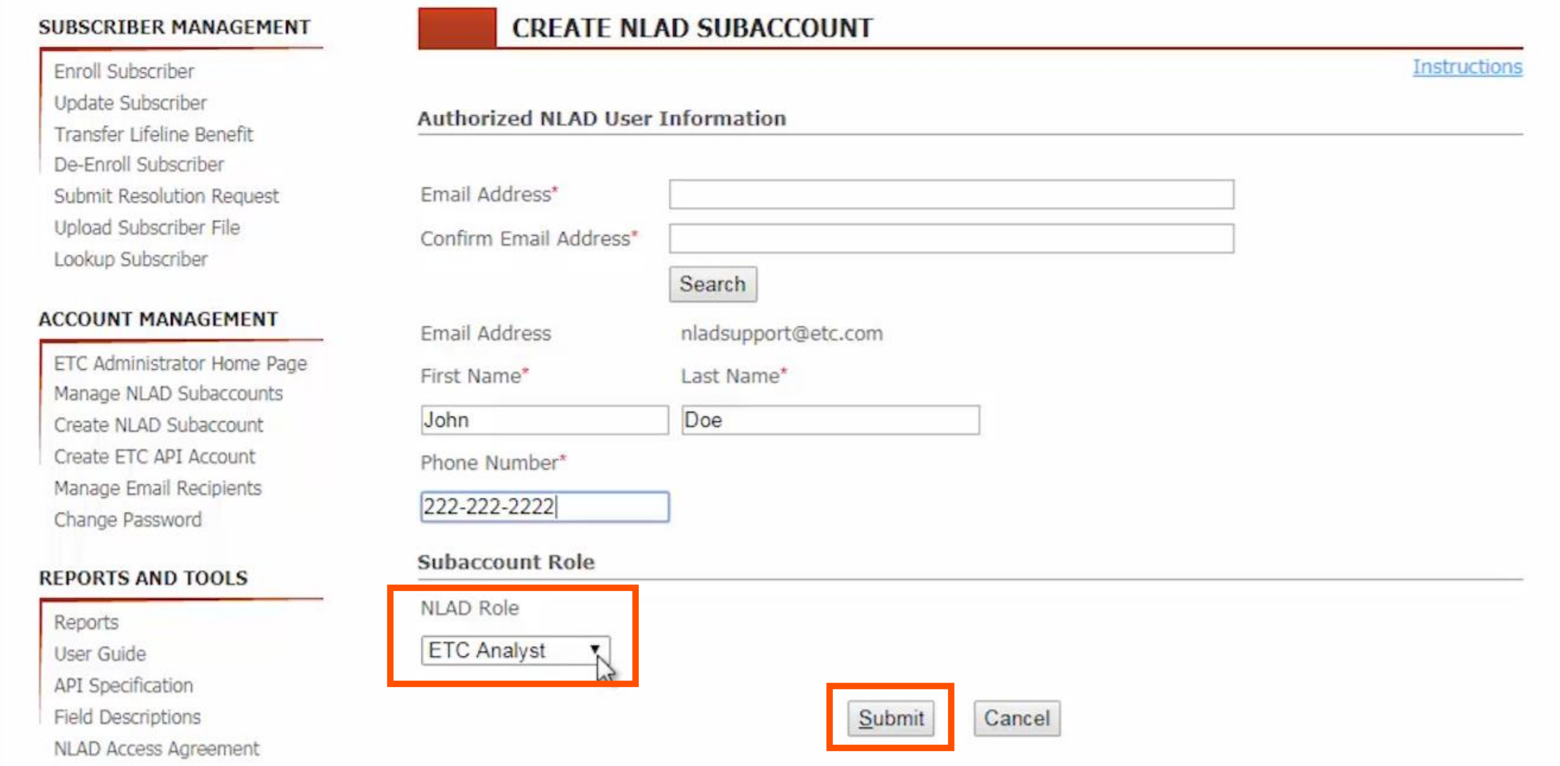
Get Started
Step 4: Enter New User Information

If the user's information is not found then the ETC Admin will enter the user's information. The user's first name, last name, and phone number are required fields.

Get Started

Step 5: Select Desired Role

Select the desired role for the account from the “NLAD Role” drop-down menu (i.e. ETC Agent) and click "Submit”.



Questions?

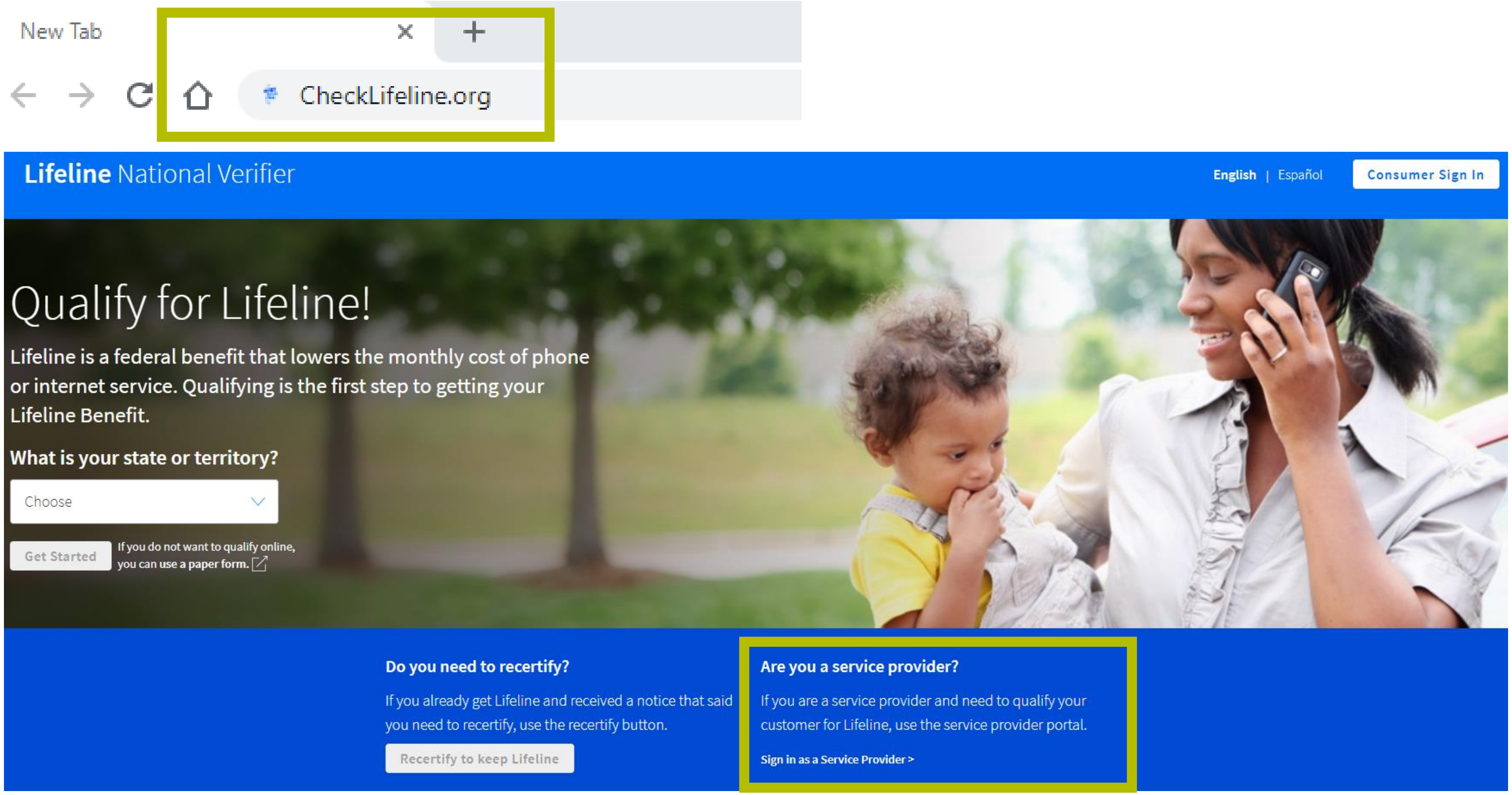
Create an NV Application

Create an NV Application

The process for creating applications in the service provider portal is:

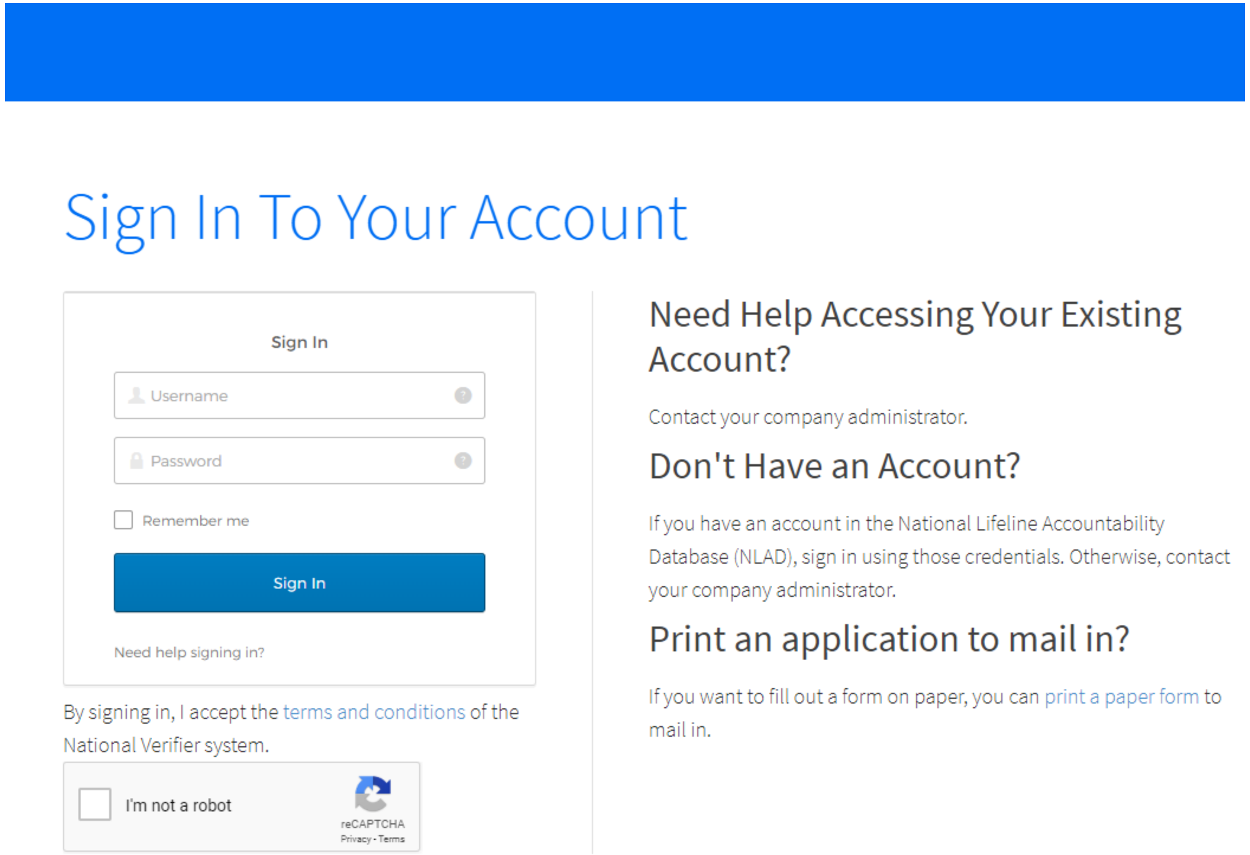
1. Sign into your **service provider account** on the National Verifier homepage.
2. **Start a new application** in the service provider portal.
3. **Enter the subscriber's information** (name, date of birth, SSN4, and address).
4. Select the subscriber's **qualifying program(s)**.
5. **Review** the subscriber's information.
6. Ask the subscriber to initial and e-sign the **Subscriber's Agreement**.

Create an NV Application



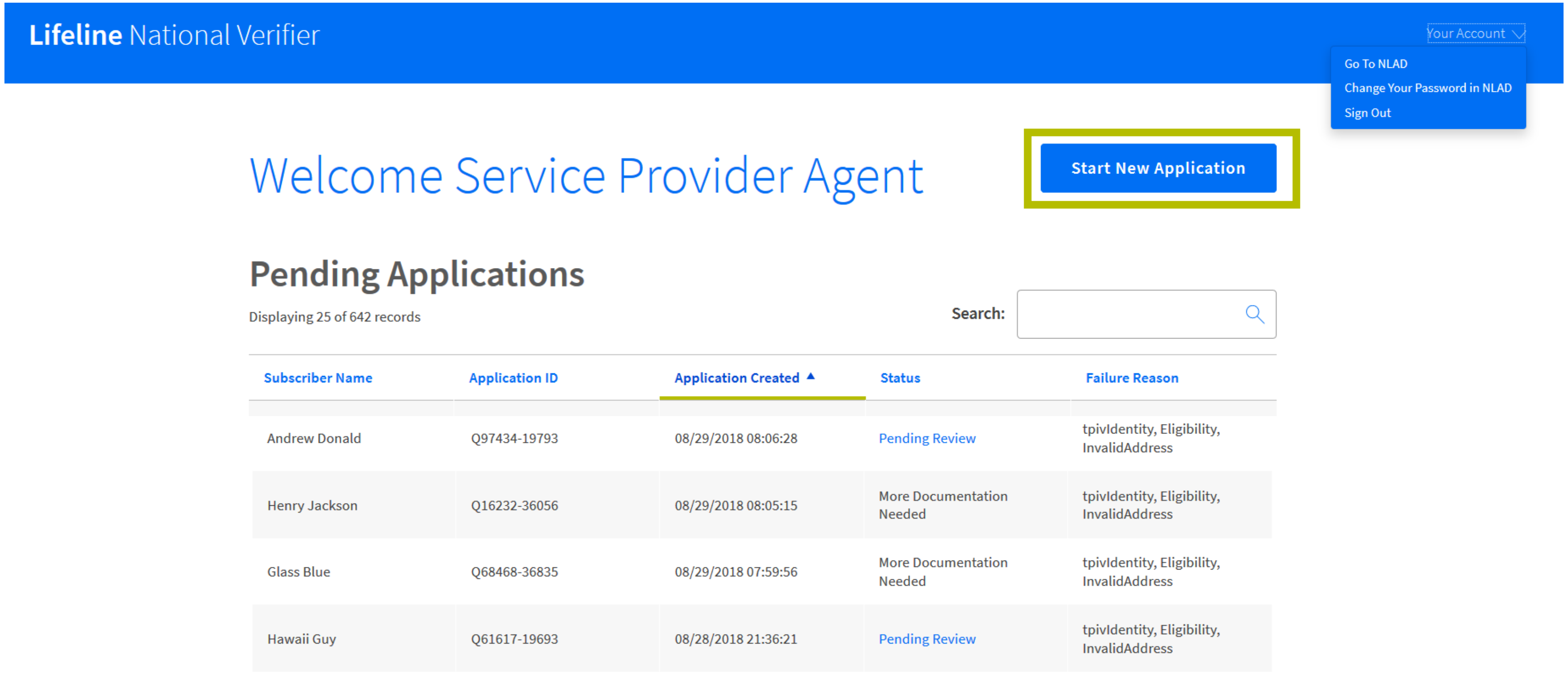
Create an NV Application

Note: SP representatives should not allow their browsers to store their NV SP portal username and password. They must enter their username and password each time they log in.



Create an NV Application
Home Page View – Apply

The service provider can assist a consumer start a new application by clicking the “**Start New Application**” button on their home page.



Create an NV Application
Home Page View – Apply

1 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.

First Name

Middle Name (Optional)

Last Name

Suffix (Optional)

What is their date of birth?

Month MM

Day DD

Year YYYY

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

Give their Tribal Identification Number instead.

What is their Tribal Identification Number?

Give their Social Security Number instead.

What is their home address?

The address where they will get service. Do not use a P.O. Box.

Street Number and Name

Apt, Unit, etc.

City

State

Zip Code

Clear All

Next

OMB Control Number: 3060-0819 Paperwork Reduction Act Notice Privacy Act Statement

Note: A consumer can find the last four numbers of their social security number on their social security card, tax returns, W-2, and bank statements. A consumer can find their Tribal ID number on their Tribal ID card or relevant documentation.

Create an NV Application
Home Page View – Apply

2

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 ?

Back

Next

3

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:	**Jane Mary Smith**
Date of Birth:	**March 10, 1959**
Last 4 Numbers of SSN:	**1234**
Address:	**123 Main Street, Apt 206 Chicago, IL 56789**

Edit

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

- [x] 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.

Back

Next

Create an NV Application
Home Page View – Apply

3 Subscriber's Agreement

Please have the subscriber initial next to each statement and sign this form to finish the process.

I understand that it is against the law to lie on this form and agree, under penalty of perjury, to the following statements:

Initial

JS

I (or my dependent or other person in my household) currently get benefits from the government program(s) listed on this form or my annual household income is 135% or less than the Federal Poverty Guidelines (the amount listed in the Federal Poverty Guidelines table on this form).

…There are 9 total statements to initial.

Scroll Down

Subscriber's Signature

Type your full legal name (the same as you gave us before) below.

Jane Mary Smith

☑ I understand this is a digital signature, and is the same as if I signed my name with a pen.

Back   Submit

! It is critical that the consumer understands and consents to the information in each statement.

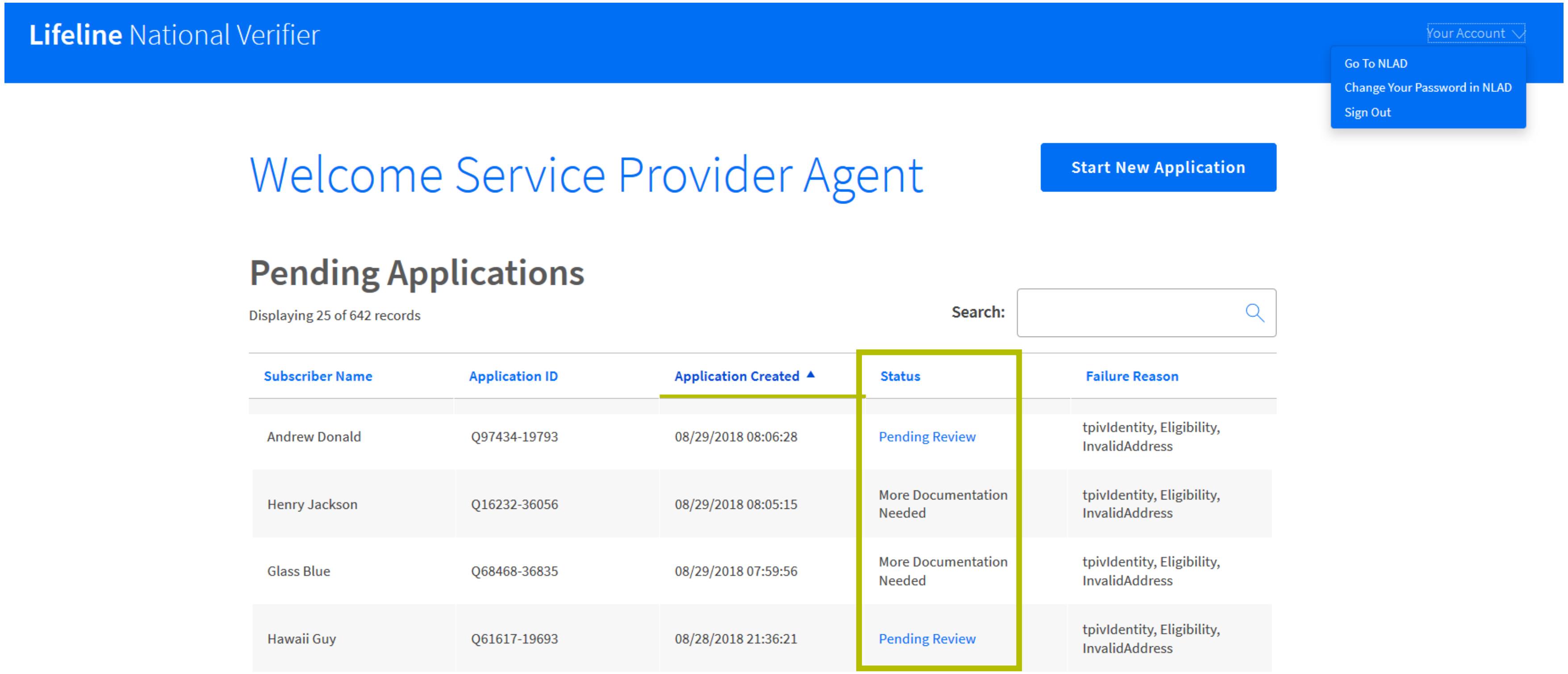
The representative cannot initial the boxes on the form or enter the e-signature for the consumer. The benefit recipient must be the one to initial, even when applying with a BQP.

After submission is complete, user will be redirected to the page corresponding to eligibility application status (i.e. Qualified, Already Enrolled in Lifeline, Pending Review).

Check Application Status

Check Application Status

Once a service provider has assisted a consumer in submitting an application, they will be able to see all pending applications they have submitted.

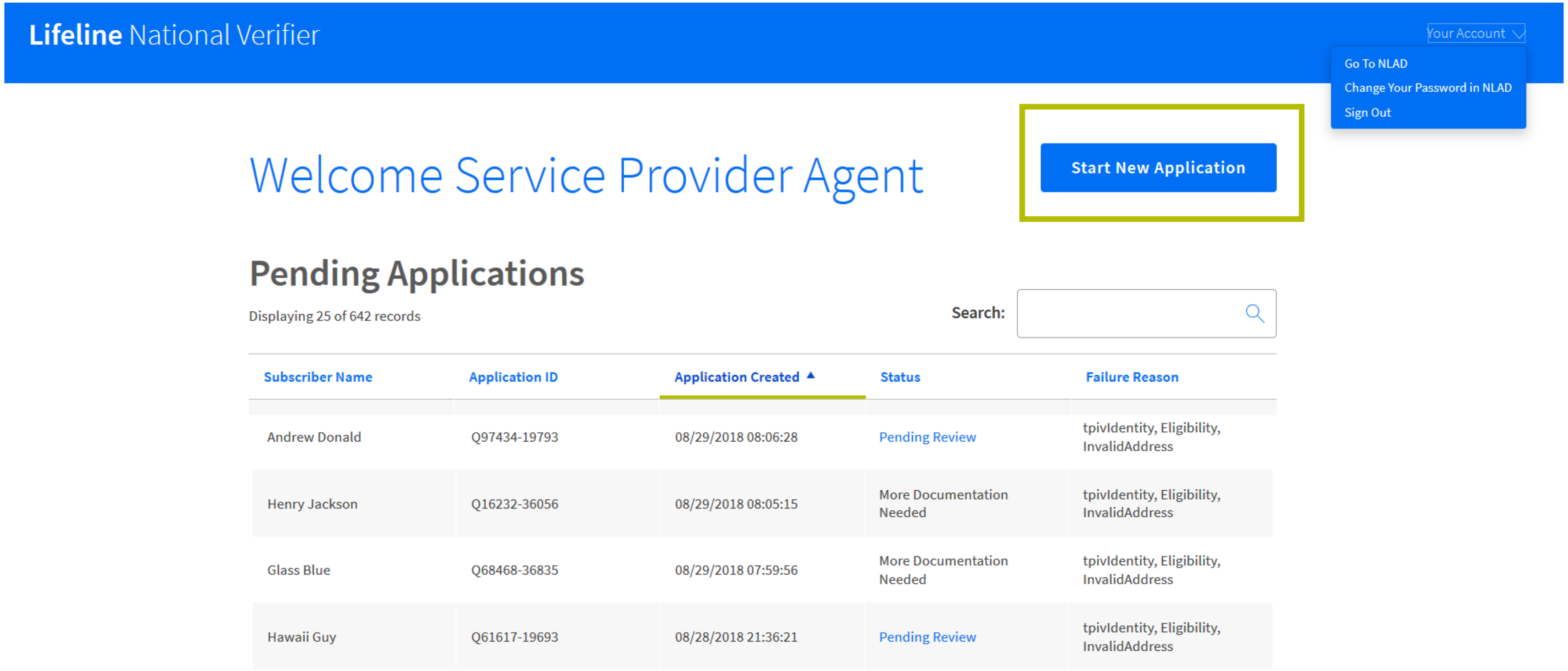


Note: If an application is in **"More Documentation Needed"** status, service provider representatives must select "Start New Application" and **re-enter the consumer's PII** to retrieve the current application.

Submit Documentation

Submit Documentation

1. If a consumer requests assistance from a service provider representative in uploading documentation, they can help via their NV service provider portal account.
2. The representative will need to click "**Start New Application**" and follow the same steps as when creating a new application to then enter the consumer's PII and retrieve the consumer's application errors.



Submit Documentation

1

We Didn't Recognize Their Information

We couldn't match the subscriber in our records.

Show that they are this person.

This is the information you gave us.

Full Legal Name:	**Pending Again**
Date of Birth:	**October 13, 1987**
Last 4 SSN:	**3312**

If you see a typo in their information, fix it here.

2

Show us that this information is right.

We couldn't confirm the subscriber's identity. We need to see an official document that has their first name, last name, date of birth, and Social Security Number (SSN) on it. Please show us something from one of the following lists.

Show us 1 item:

To be accepted, the copy must have their first name, last name, date of birth, and SSN on it.

- U.S. government, military, state, or Tribal issued ID (unexpired)
- Military discharge documentation
- Weapons permit (unexpired)
- Government assistance program document (that includes proof of identity)
- Statement of benefits from a qualifying program (that includes proof of identity)
- Unemployment or worker's compensation statement of benefits

Or, show us 2 items:

To be accepted, both copies must have their first name and last name on them, and one must have their date of birth on it and the other must have their SSN on it.

Show their date of birth

- Driver's license (unexpired)
- Birth certificate
- Passport (unexpired)
- Certificate of Naturalization (or Certificate of U.S. Citizenship)
- Permanent Resident Card (unexpired)

Show their SSN

- Social Security card
- Social Security Benefit Statement (SSA-1099)
- W-2
- Prior year's state, federal, or Tribal tax return

Give us your documents.

Upload the file here

Choose file

Back Next

Submit Documentation

3

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Document submission complete!

Submit Documentation

4 If the NV system is sending the eligibility check in real-time, the consumer will be redirected to the page here.

This page will update once the consumer's documentation is reviewed.

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.

If they qualify...

You will have 90 days to enroll Water Bottle in NLAD.

If they do not qualify...

We'll ask for more information or tell you what to do next. **You will have until 3/6/2018 (Based on US Eastern Time)** to send us the information or complete the next steps.

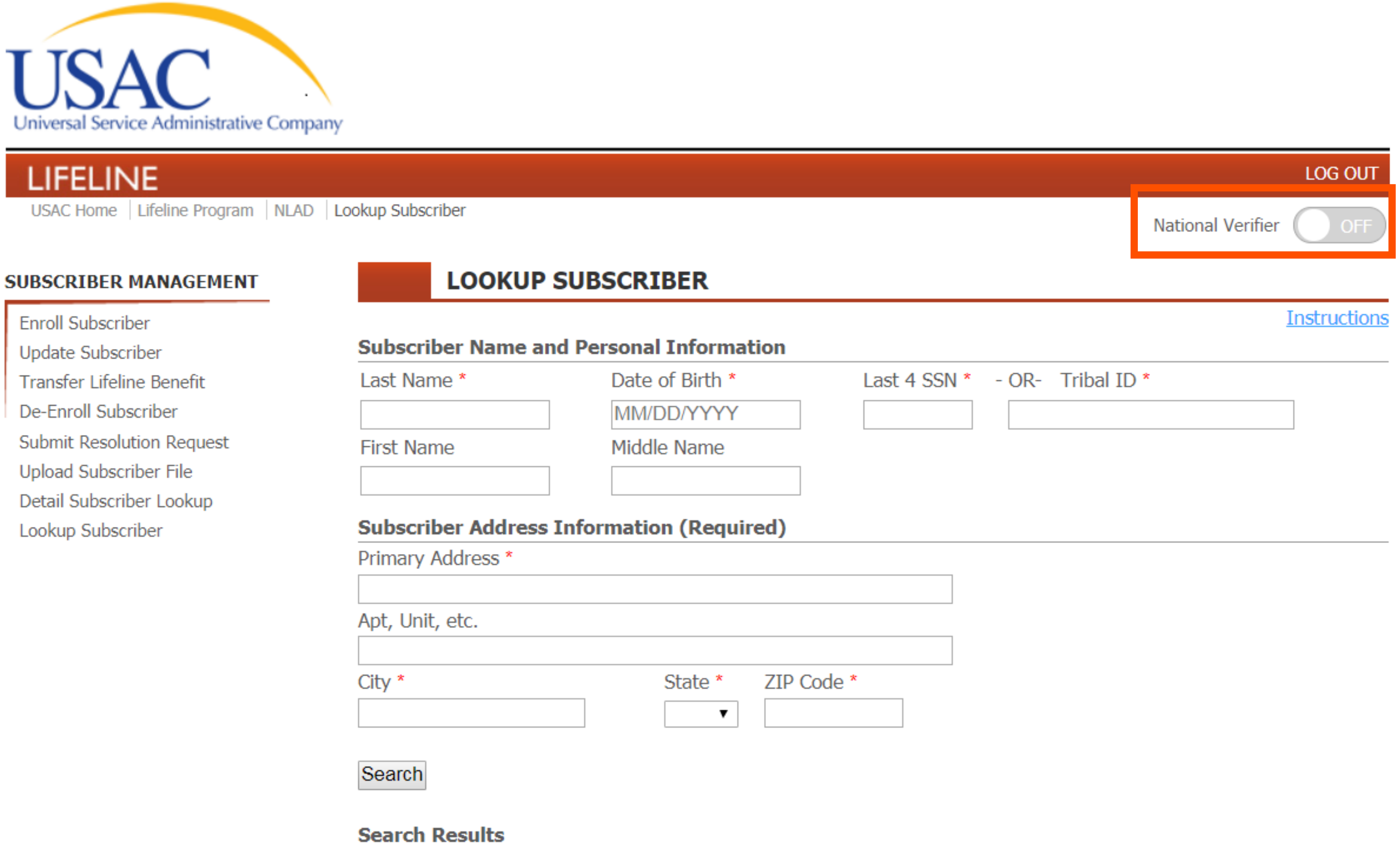
NLAD and the National Verifier

NLAD and the National Verifier

- Before a service provider enrolls a new subscriber in Lifeline, NLAD will prompt them to confirm the consumers' eligibility through the National Verifier
- Once the consumer is approved by the National Verifier, the service provider can enroll them in NLAD using the National Verifier mode
- During the soft launch, service providers have the option to use NLAD in the National Verifier or legacy mode

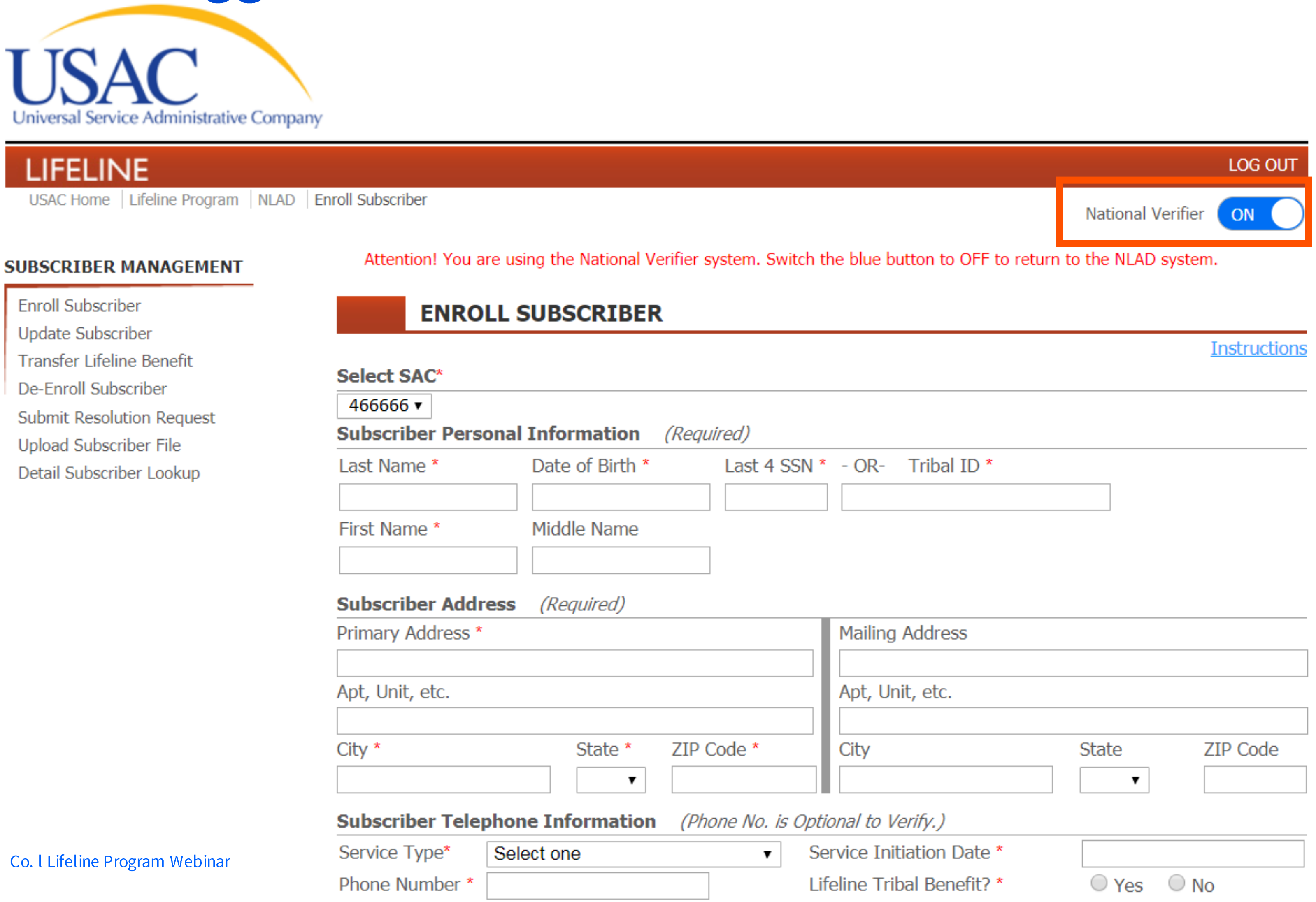
NLAD and the National Verifier

National Verifier Toggle: Off



NLAD and the National Verifier

National Verifier Toggle: On



Questions?

Training & Resources

Upcoming Training
December 2019 Launch Schedule

January

January 21, 2020 3:00 – 4:00 PM ET	**National Verifier Training 3 (Application Submission Process)** This training provides a high-level overview of the application submission process through the NV, submitting paper applications, and eligibility checking.	Register
January 23, 2020 3:00 – 4:00 PM ET	**National Verifier Office Hours 1** This training is an open forum for service providers to ask questions about the first three training sessions.	Register

February

February 6, 2020 3:00 – 4:00 PM ET	**National Verifier Training 4 (Correcting Eligibility Errors)** This training focuses on the processes to correct eligibility errors in the NV and document submission. Trainees will learn all of the potential errors they may encounter and how to resolve them.	Register
February 18, 2020 3:00 – 4:00 PM ET	**National Verifier Training 5 (Using the National Verifier without Portal Access)** This training provides a high-level overview of program rules and how SPs can work with consumers without the SP portal.	Register
February 25, 2020 3:00 – 4:00 PM ET	**National Verifier Office Hours 2** This training provides an open forum for SPs to ask questions about the soft launch of the NV.	Register

National Verifier Overview
Resources

USAC is committed to helping service providers prepare to use the National Verifier

- Series of training sessions and videos
- Office hours (open sessions where SPs can ask questions)
- Staging (pre-production) environment and Staging Guide
- National Verifier Service Provider web pages
- Outreach emails (not receiving these? Email us at LifelineProgram@usac.org)

Thank You!

- **Thank you for joining us!**
- Please email us at LifelineProgram@usac.org to be added to the **National Verifier training and outreach list** with the list of states that you do business in.
- **Sign up for Lifeline Program email updates and upcoming events**
  - Visit our subscription center
- **Need help? Contact us!**
  - General: LifelineProgram@usac.org

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