

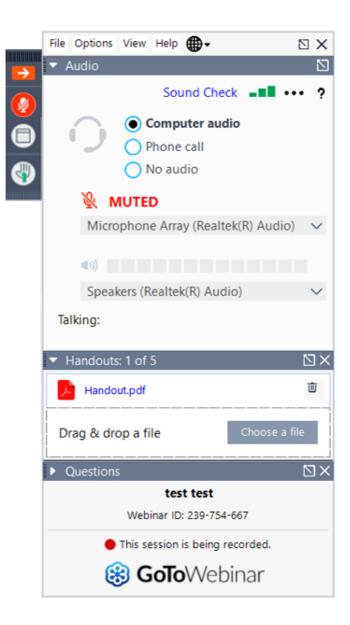
## **Lifeline May 2024 Monthly Webinar**

USAC Systems and Their Functions May 8, 2024



## 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**



Winta Woldu

Communications Specialist |
Lifeline



Senior Communications Specialist | Lifeline

## **Agenda**

- Announcements
- Introduction
- System Resources
  - E-File
  - Create User Accounts
  - Representative Accountability Database (RAD)
  - National Verifier (NV)
  - National Lifeline Accountability Database (NLAD)
  - Lifeline Claims System (LCS)
- Resources

## Lifeline Mailing Address Transition

- The mailing address for the Lifeline Support Center will transition to a new address on June 1st.
- Beginning June 1, 2024, consumers will send their applications and/or supporting documentation to the new mailing address. The support center will forward mail sent to the old P.O. Box for one year to ensure there is no interruption in application/document processing.

#### **New P.O. Box Mailing Address:**

Lifeline Customer Support Center

P.O. Box 1000

Horseheads, NY 14845

• For now, service providers should update-their consumer outreach materials including FCC forms that contain the current Lifeline Support center mailing address to account for the new address.

## Reverification Group Two & Four Updates

- 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.
- USAC implemented reverification in groups. Each reverification group proceeds through a two-part process to reverify subscribers that did not automatically pass the database check:
  - **Part One:** Collect on-hand documentation from service providers. At this stage, service providers were not expected to collect documentation from subscribers.
  - Part Two: Perform direct consumer outreach to collect documentation from subscribers.

## Reverification Group Two

- Reverification Part One for Group Two is complete (Both parts are complete for Group 1).
- Group Two includes Puerto Rico, California (broadband only), Florida, Illinois, Minnesota, Ohio, and Wisconsin.
- On May 21, 2024, USAC will initiate direct outreach to subscribers in Group Two and Group Four to request required documents.
  - Subscribers will have 60 days to submit documentation.
  - USAC will de-enroll from the National Lifeline Accountability Database (NLAD) subscribers that fail to successfully complete reverification and notify affected subscribers by mail.
  - All final documentation is due between July 17- July 21, 2024.

## Reverification Group Four

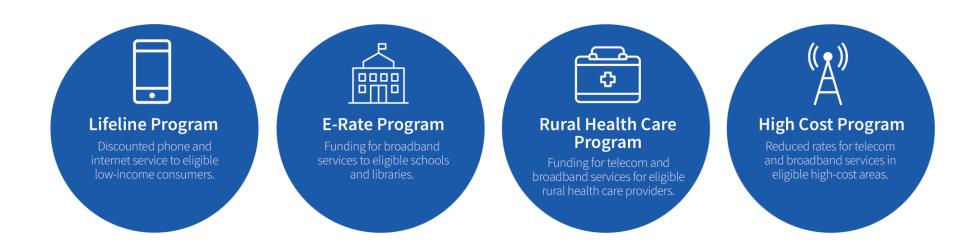
- Reverification Part One for Group Four is complete.
- Group Four includes all states/territories.
- On **May 21, 2024**, USAC will initiate direct outreach to subscribers in Group Four to request required documents.
  - Subscribers will have 60 days to submit documentation.
  - USAC will de-enroll from the National Lifeline Accountability Database (NLAD) subscribers that fail to successfully complete reverification and notify affected subscribers by mail.
  - All final documentation is due between July 17- July 19, 2024.

## Introduction

## Introduction

#### **USAC Overview**

- The Universal Service Administrative Company (USAC) is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC).
- USAC is responsible for administering the Universal Service Fund (USF) and its four programs.
- The USF aims to ensure that all people in the United States have access to quality, affordable connectivity service.



## Introduction

#### Lifeline Overview

The Lifeline program is a federal benefit program that helps low-income households pay for phone and/or internet service.

#### Eligible households can receive:

#### \$9.25 Standard Discount

Up to \$9.25/month discount for internet or bundled services and up to \$5.25/month for voice-onlyservice that meets the minimum service standards.

#### \$34.25 Tribal Discount

Up to \$34.25/month discount for households on <u>qualifying Tribal</u> <u>lands</u>.

#### \$100 Link Up Discount

A one-time discount of up to \$100 off the initial set up fees at addresses on qualifying Tribal lands receiving voice service from certain service providers.

The Lifeline benefit is limited to one monthly service discount per household.

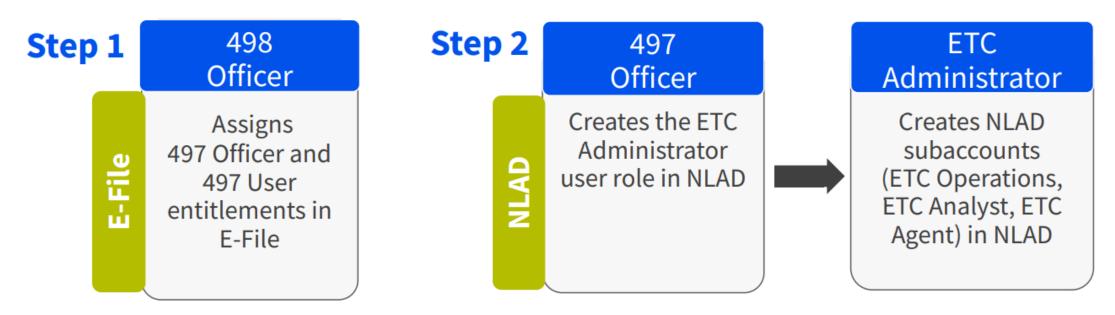
## **System Resources**

**USAC Systems and Their Functions** 

## **System Resources**

## Accessing Lifeline Systems

Getting access to Lifeline systems, including the National Lifeline Accountability Database (NLAD), starts with E-file.



## **System Resources**

## Lifeline Systems Overview

# System Functions • Service provider registration • File FCC Form 498 • 498 Officer assigns 497 Officer and 497 User roles.

#### Representative Accountability Database (RAD)

- Representative registration
- Service provider agents register for a representative ID in RAD.

#### National Lifeline Accountability Database (NLAD)

- Subscriber management
- 497 Officer assigns ETC Administrator user role.
- ETC
  Administrator assigns
  ETC Analyst, ETC
  Operations, and ETC
  Agent user roles.

#### **National Verifier**

- Consumer eligibility verification
- Once the NLAD account is created ETC Administrator, Analyst, Operations, and Agent user roles will automatically have access to the National Verifier.

## Lifeline Claims System (LCS)

- Service provider files claims for reimbursement
- 497 Officer and 497 User are the only users with access to the LCS.

## **Questions?**

#### Service Provider User Accounts for E-File

#### **498 Officer**

Authorized to certify the FCC Form 498.

Also assigns and manages the 497 Officer and 497 User roles in E-File.

#### **497 Officer**

Must certify reimbursement claims.

Manages the ETC Administrator user role in NLAD.

#### **497 User**

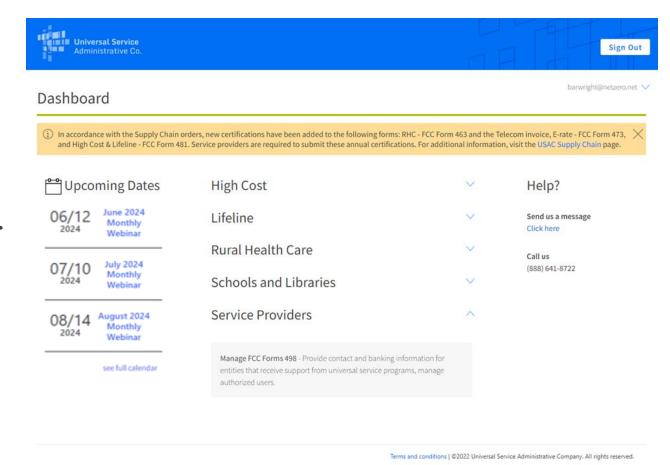
Can upload, modify, and submit claims, but cannot certify claims.

#### 497 Officer Entitlements

- To file a claim using LCS or to submit a downward revision using the FCC Form 497, an E-File account is required.
- 498 Officers have entitlements as a 497 Officer but must certify that entitlement in E-File to access NLAD.
- The company's 498 Officer must log in to E-File and either:
  - Certify themselves as the 497 Officer, or
  - Establish new users and current E-File users associated with the company.

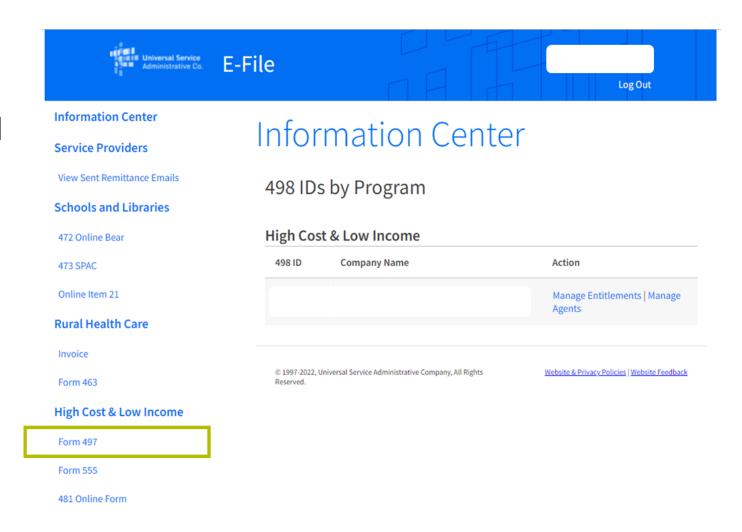
#### Access E-File & New Users

- 498 Officers, may log in to USAC's One Portal to access E-File:
  - Then, Select to Manage FCC
     Forms 498 under the Service
     Provider section of the dashboard.



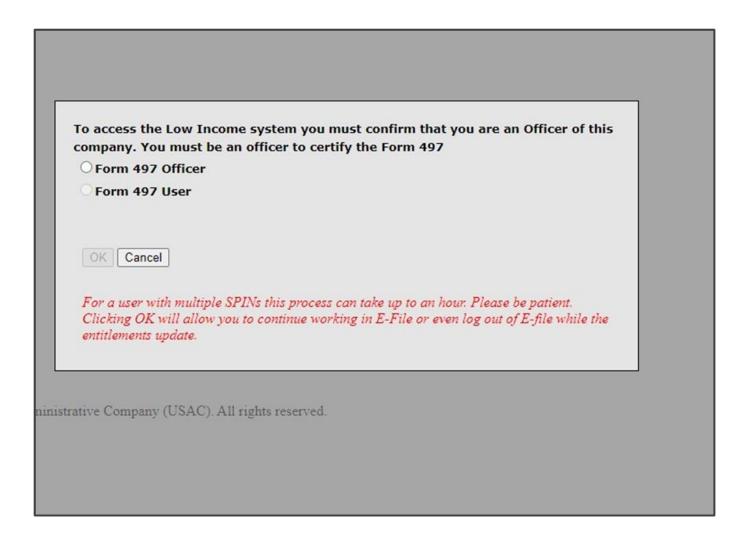
## E-File Landing Page

The 498 Officer can select
 Form 497 from the lefthand menu to access the form.



## Certify 497 Entitlement

- Then they can select Form 497
   Officer or User and select OK to confirm.
  - For 498 Officers with multiple SPINs, it can take up to an hour for the entitlements to update in E-File.

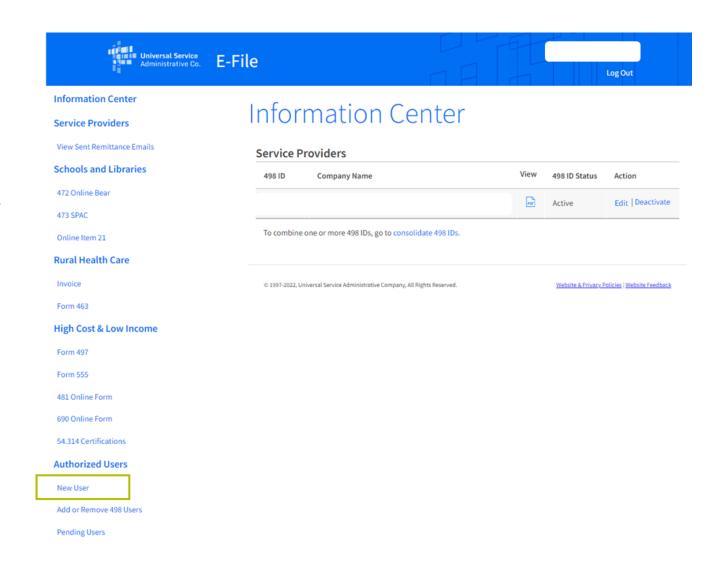




**Create New Users** 

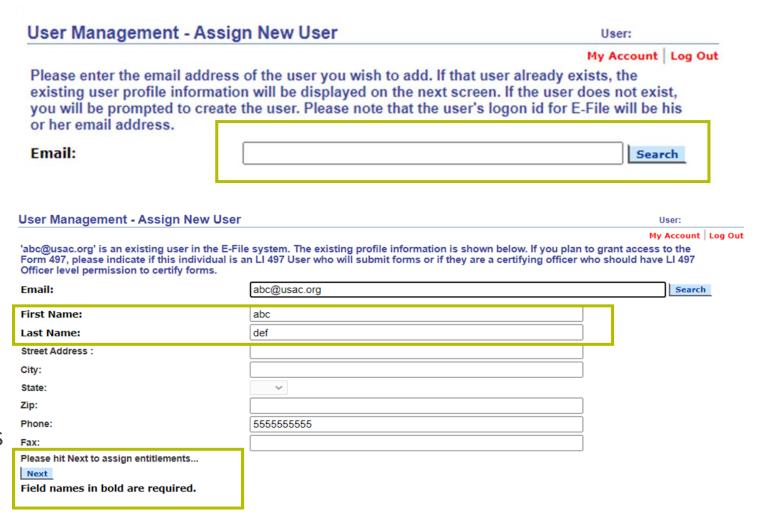
#### Create New User

- To create a new 497 officer:
- They select, New User under the authorized Users section of the left-hand navigation menu.



#### Create 497 Officer

- Enter in the email address of the user to receive the 497 Officer entitlements, and Search.
- Enter in the user's first and last name (these are the only required fields), and
- Click Next
  - Note: It may take a few seconds before the next page loads



#### Create 497 Officer

- Click the LI Form 497 checkbox,
- Select 497 Officer from the dropdown menu,
- Click the checkbox for the SPIN(s) the user should have 497 Officer entitlements, and
- Select Save.
- You will receive a confirmation message that the user was successfully added.



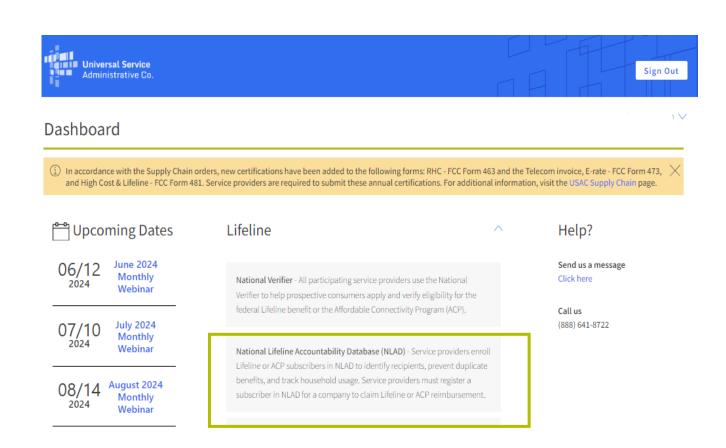
## **ETC Administrator**

**Create New Users** 

## **Create ETC Administrator**

#### **Access NLAD**

- To create an ETC admin, log in to USAC's <u>One Portal</u> to access NLAD.
  - Select National Lifeline
     Accountability Database
     (NLAD) under the Lifeline section of the dashboard.



## **Create ETC Administrator**

## **Account Management**

- From the 497 Officer
  Homepage workflow, you can create a new ETC
  Administrator account or assign it to an existing account.
- Select 497 Officer Home
   Page from the Account
   Management section.

Claims Account Management Tools & Resources

USAC Home | Lifeline Program | NLAD | Account Management

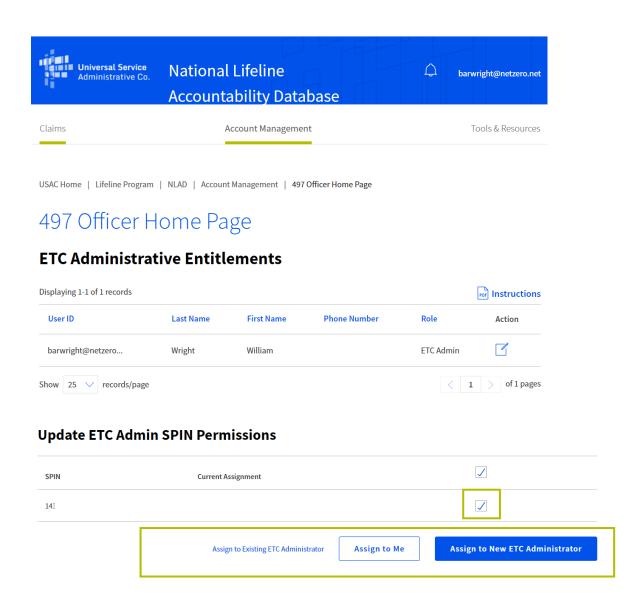
#### Account Management

Create, manage, and review subaccounts for your SPINs

- 497 Officer Home Page Review ETC Administrator Accounts and manage SPIN assignments.
- ETC Administrator Home Page Maintain SAC Information.
- Manage Representative IDs Link one or more Representatives who have an existing subaccount.
- Manage Subaccounts Review NLAD and National Verifier subaccounts and select accounts to update.
- Create Subaccounts Create a new NLAD or National Verifier subaccount.
- Create ETC API Account Create a new NLAD or National Verifier API Account.
- Manage Email Recipients Assign contacts to receive NLAD-related emails.

## **Create ETC Administrator** ETC Entitlements

- Select the SPIN(s) you want to assign.
- Select one of the options below:
  - Assign to new ETC Administrator
  - Assign to me
  - Assign to existing ETC Administrator

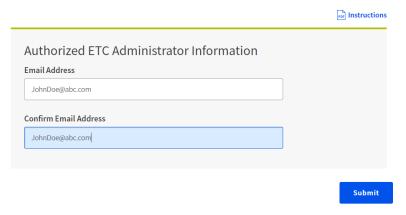


## **Create ETC Administrator**

#### **New ETC Administrator**

- Enter the email address for the account you want to set up as the ETC Administrator and Submit.
- Then the new user's account and company information into the Authorized ETC Administrator Information section.
- Click Create.
- You will receive a confirmation message that the user was successfully added as an ETC Administrator.

#### Create ETC Administrator Account



#### Create ETC Administrator Account

Email: JohnDoe@abc.com		
First Name	Last Name	
John	Doe	
Phone Number	Representative ID (optional)	
(202) 999-9999		
TC Information		
Company Primary Address		Apt, Unit, etc
700 12th St NW		
City	State	ZIP Code

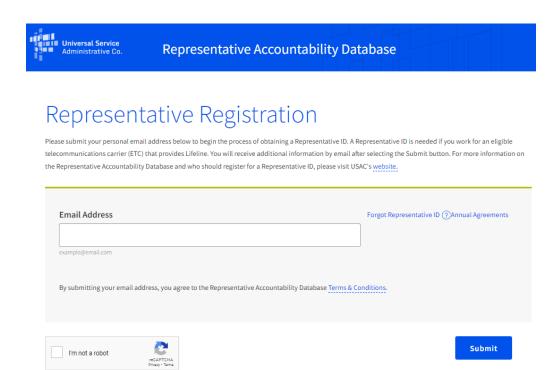
## **Questions?**

## **Representative Accountability Database**

## Representative Accountability Database

#### Overview

- The <u>Representative Accountability Database (RAD)</u> is the registration system that validates the identities of service provider representatives performing transactions in <u>NLAD</u> and the <u>National Verifier</u>.
- The Representative ID is a unique 9-digit number that connects Service provider's identity to the transactions they complete in NLAD and the National Verifier.
- The 497 Officer is responsible for linking ETC Administrator accounts.
  - The ETC Administrator is responsible for linking NLAD subaccount users (ETC Analyst, ETC Operations, ETC Agent).



# Representative Accountability Database Obtain a Rep ID

Register

• Representative registers and receives a Rep ID at LifelineRAD.org.

Link

 Rep ID is shared with the 497 Officer who links the ETC Admin to Rep ID in NLAD then the ETC Admin links the Rep ID to the company in NLAD via the user's account.

Perform

 After the Rep ID is linked, Service providers users access and perform transactions in the National Verifier and NLAD.

Note: Any international representatives cannot be linked to NLAD subaccounts. They can only be linked to APIs.

#### Overview

- The <u>National Lifeline Accountability Database</u> (NLAD) is the system that service providers
  use to manage their Lifeline subscribers, including enrolling consumers in the program,
  transferring and de-enrolling subscribers, and reviewing reports about their Lifeline
  subscribers.
- Use of NLAD is available through USAC's <u>One Portal</u> system, which allows users to access all Universal Service Fund IT applications through the same portal.
  - In most states (with the exception of <u>NLAD opt-out states</u> California, Oregon, and Texas), service providers use NLAD to enroll their consumers.
- After qualifying for the Lifeline program through the National Verifier, service providers
  must enroll them in NLAD in order to claim reimbursements.
- All account types for NLAD and the National Verifier are created in NLAD.

#### **NLAD Subaccounts**

#### **ETC Admin**

Can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests in NLAD. User can create and manage the other three account types.

User also has access to the National Verifier to check consumer eligibility.

#### **ETC Analyst**

Can perform subscriber transactions, query subscriber data, create and view reports, and submit resolution requests in NLAD.

User also has access to the National Verifier to check consumer eligibility.

#### **ETC Operations**

Can query subscriber data and view reports in NLAD.

User also has access to the National Verifier to check consumer eligibility.

#### **ETC Agent**

Only has access to the National Verifier to check consumer eligibility.

User does not have NLAD access.

To perform transactions in NLAD and the National Verifier, service provider representatives must register for a Representative ID (Rep ID).

### Subscriber Management

Service providers must update NLAD every time a customer enrolls or de-enrolls in Lifeline or changes their account information.

- **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.

### Subscriber Management

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 <u>batch template</u> (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.

**Note:** Enrolling subscribers is necessary in order for service providers to claim reimbursements.

# **National Verifier**

### **National Verifier**

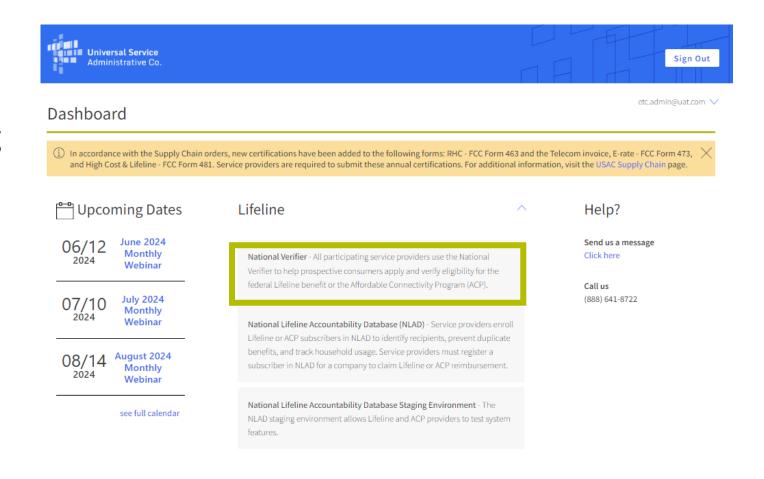
#### Overview

- The <u>National Verifier</u> is the centralized application system where consumers can apply for and determine whether they are eligible for Lifeline.
  - Use of the National Verifier is required in all 56 states and territories to determine eligibility (with the exception of the <u>NLAD opt-out states</u>: Texas, Oregon, and California, where the National Verifier monitors the state administrator Lifeline eligibility verification process).
- After qualifying for Lifeline, service providers must enter subscribers in NLAD and enroll them in order to claim reimbursement.

### **National Verifier**

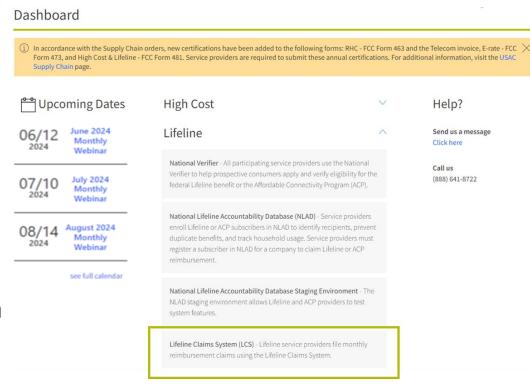
#### **Access National Verifier**

- Access the National Verifier through USAC's <u>One Portal</u> using their NLAD credentials.
  - Select National Verifier



#### Overview

- The <u>Lifeline Claims System (LCS)</u> is the online filing system that service providers use to receive reimbursement for offering Lifeline-supported services to eligible Lifeline subscribers.
- After providing subscribers with Lifeline-supported service, a service provider must submit a claim to receive reimbursement.
- Service providers must submit one reimbursement claim for each month they are claiming support through LCS.
  - A 497 officer or 497 user account is required to file a claim.
- Service providers have up to one year after the data month to submit original claims and upward revisions.



#### **User Accounts**

- LCS User Account Types:
  - A **497 Officer** can enter data, is authorized to certify the claim and is responsible for password resets for sub-accounts.
  - A **497 User** (sub-account) can enter data, but does not have the authority to certify the claim.

#### How to File Claim

1

Access LCS and download the Claims Input Template for a list of subscribers eligible for reimbursement

ž

Modify the appropriate data on the list as needed

3

Upload the report in LCS

4

Set the claim as "ready to certify"

5

Certify the submission (497 Officer must complete this step)

# **Questions?**

### Resources

#### Service Provider Resources

- Service Provider Toolkit
- USAC's Lifeline website for service providers: <u>usac.org/lifeline</u>
  - Lifelines Webpages for: <u>RAD</u>, <u>NV</u>, <u>NLAD</u>, <u>LCS</u>.
- <u>Service Provider FAQs</u>
- Contact <u>LifelineProgram@usac.org</u> for technical questions, assistance, and general inquiries.
- The Lifeline Support Center:
  - Available by email at <u>LifelineSupport@usac.org</u> or telephone (800) 234-9473 seven days a
    week from 9 a.m. to 9 p.m. ET.

# **Thank You!**

