Available for Public Use

Navigating USAC Systems

Lifeline Program

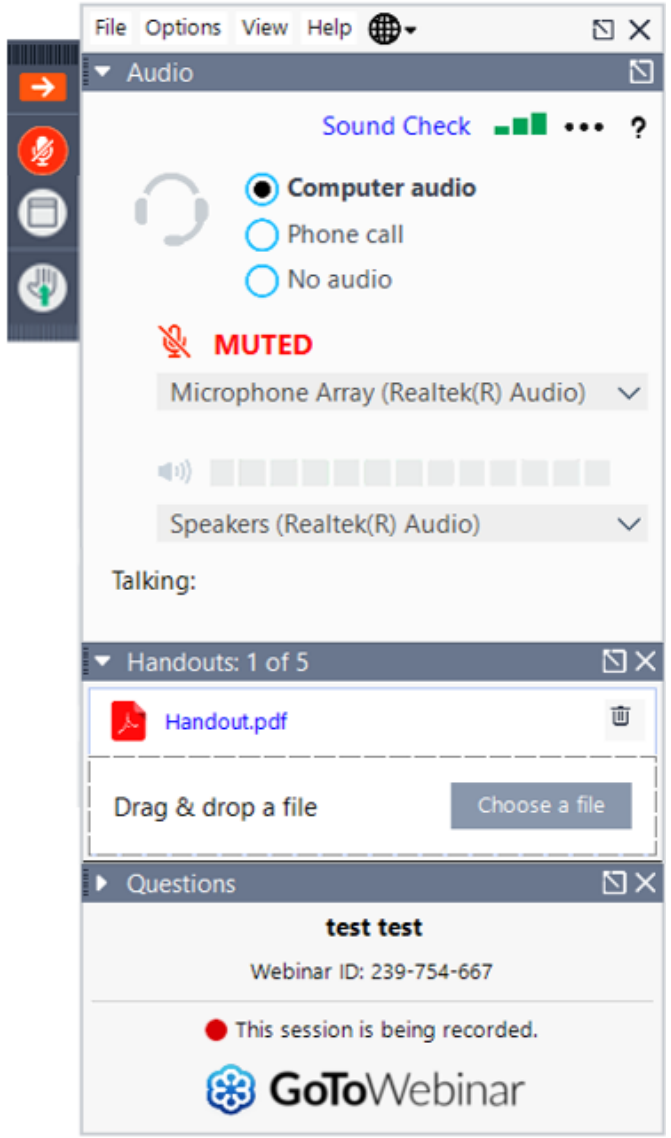
March 12, 2025

Universal Service Administrative Co.

Available for Public Use

Housekeeping

- This webinar is being recorded.
- 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

Oladotun Adio
Communications Specialist

Linnita Hosten
Senior Communications Specialist

Agenda

- Announcements
- Introduction
- Lifeline Systems
  - E-File
  - Representative Accountability Database (RAD)
  - National Lifeline Accountability Database (NLAD)
  - National Verifier
  - Lifeline Claims System (LCS)
- Resources

Available for Public Use

Announcements

Announcements

2025 Recertification Update

- Recertification is an annual requirement that ensures all active Lifeline subscribers are still eligible for the benefit.
- 2025 recertification began on February 13, 2025, when USAC initiated automated eligibility database checks to verify the eligibility of Lifeline subscribers who are due for recertification.
- Subscribers who pass the automated check will not be required to take further action.
- Subscribers who fail the automated check will need to manually recertify their continued eligibility.
  - USAC will send outreach either by email or mail with further instructions on how to complete the process.
- Service providers are advised to regularly monitor the **Recertification Subscriber Status Report** in NLAD to identify subscribers undergoing recertification.
  - This report is updated daily to reflect automated check results.

Announcements

Reminder of Waivers

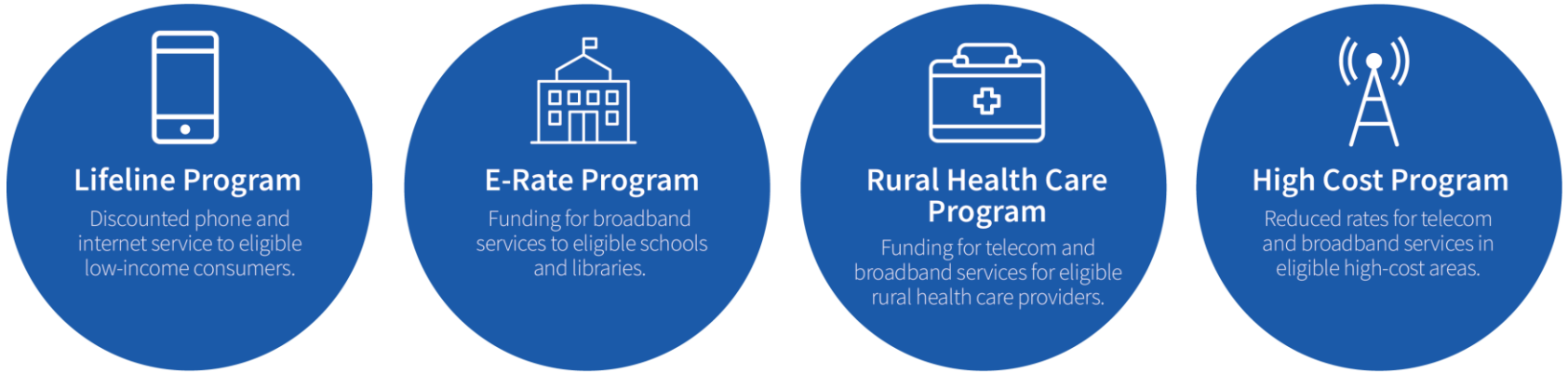
- **California Wildfires Relief (expires March 17, 2025):** On January 16, 2025, the Wireline Competition Bureau (WCB) of the Federal Communications Commission (FCC) released an Order temporarily waiving the annual recertification requirements and de-enrollment for failed recertification under the Lifeline rules for households receiving **broadband-only Lifeline service** in Affected Disaster Areas. Once the waiver period ends, USAC will resume recertification efforts.
- **Hurricane Helene Order (expires April 2, 2025):** On October 2, 2024, the FCC adopted an Order temporarily allowing consumers affected by Hurricane Helene, Tropical Storm Helene, and Post-Tropical Cyclone Helene (collectively referred to as the Helene Weather Events) who are participating in FEMA's Individuals and Households Program (IHP) to qualify for and enroll in the Lifeline program.
- **Hurricane Milton Order (expires April 10, 2025):** On October 10, 2024, the FCC adopted an Order temporarily allowing consumers participating in FEMA's IHP because of Hurricane Milton to qualify and enroll in the Lifeline program.

Introduction

Introduction

USAC Overview

- The Universal Service Administrative Company (USAC) is an independent, not-for-profit organization designated by the Federal Communications Commission (FCC) as the permanent administrator of 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.
  - The FCC develops policies and regulations for all four programs, including Lifeline, and provides guidance to USAC.
  - USAC administers all programs, including Lifeline, and educates stakeholders on processes, systems, and rules and requirements.



Introduction
Lifeline Overview

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

- Eligible households can receive:

$9.25 Standard Discount
Up to $9.25/month discount for internet or bundled services or up to $5.25/month for phone service that meets the minimum service standards.

$34.25 Tribal Discount
Up to $34.25/month discount for households on qualifying Tribal lands.

$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.

$9.25 Survivor Benefit
Monthly discount of up to $9.25 for up to six months on phone, internet, or bundled service for survivors of domestic violence, sexual assault, or related crimes.

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

Introduction

How to Qualify for Lifeline (1/2)

Households can qualify for the **standard Lifeline** benefit in **three ways**:

- Household income at or below 135 percent of the Federal Poverty Guidelines.
- Participation in certain federal assistance programs such as SNAP, Medicaid, Supplemental Security Income, federal housing assistance, or Veterans Pension and Survivors Benefit.
- Participation in certain Tribal assistance programs (only available to households that live on Tribal lands) such as Bureau of Indian Affairs General Assistance, Head Start, Tribal Temporary Assistance for Needy Families (Tribal TANF), or Food Distribution Program on Indian Reservations.

Introduction

How to Qualify for Lifeline (2/2)

- There are several ways a survivor can qualify for the Survivor Benefit. Qualifying survivors experiencing financial hardship who have attempted a line separation request can:
  - Confirm their financial hardship to participate in Lifeline by meeting existing Lifeline criteria, or through the expanded qualification criteria below:
    - Household income at or below 200 percent of the Federal Poverty Guidelines
    - Enrollment in the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
    - Enrollment in the Free and Reduced-Price School Lunch or Breakfast program, including enrollment at a Community Eligibility Provision (CEP) school or school district
    - Received a Federal Pell Grant in the current award year
- **Note: Survivors must include proof of an attempted line separation request from their mobile phone company.**

Available for Public Use

Lifeline Systems

Lifeline Systems
Overview

- The Lifeline program uses four USAC systems to support service providers. These systems are shown below:

System Name	**Representative Accountability Database (RAD)**	**National Lifeline Accountability Database (NLAD)**	**National Verifier**	**Lifeline Claims System (LCS)**
System Functions	• Representative registration	• Subscriber management	• Consumer eligibility verification	• Claims system for service providers to file reimbursements
User Functions	• Where service provider agents register for their Representative ID	• 497 Officers use this system to assign the ETC Administrator user role • ETC Administrators assign ETC Analyst, ETC Operations, and ETC Agent user roles	• ETC Administrator, Analyst, Operations, and Agent user roles automatically receive access to the National Verifier once their accounts are created in NLAD	• Access to LCS is restricted to 497 Officers and Users

Note: USAC uses a single sign-on dashboard, One Portal, where users can log into NLAD, the National Verifier, and LCS.

Lifeline Systems

Accessing Lifeline Systems

- Getting access to all Lifeline systems begins with E-File.
  - Service providers must complete the FCC Form 498 and register for a 498 ID by visiting E-File in One Portal.
    - FCC Form 498 is used to collect remittance, payment, and contact information for companies that receive support from the Lifeline program.
    - A 498 ID is required for all service providers and is a unique number that ensures that approved support is directed to the correct service provider.
  - Once FCC Form 498 has been successfully completed, a 498 ID is assigned to the service provider's Company Officer, making them the 498 Officer.

Lifeline Systems

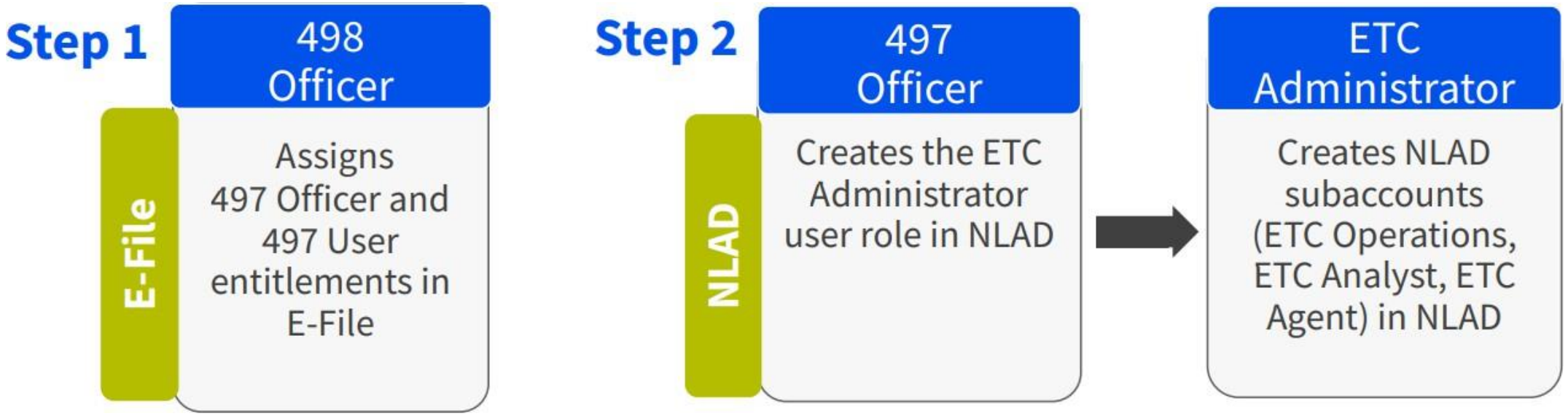
Accessing Lifeline Systems (1/2)

- In E-File, the 498 Officer must assign a 497 Officer who will be responsible for certifying Lifeline reimbursement claims and assigning the ETC Administrator account in NLAD.
  - Once this step is complete, the 497 Officer can access NLAD.
- The 497 Officer creates and assigns an ETC Administrator account by signing into NLAD though One Portal using their E-File credentials.
  - The ETC Administrator is responsible for creating the following NLAD subaccounts:
    - ETC Operations
    - ETC Analysts
    - ETC Agent

Lifeline Systems

Accessing Lifeline Systems (2/2)

Below is a high-level overview of the steps required to access Lifeline systems, beginning with E-File:



Questions?

E-File

E-File

Service Provider User Accounts

The user accounts shown below are created in E-File:

498 Officer

- Authorized to submit and certify the FCC Form 498.
- Permission to assign and manage the 497 Officer and other 497 User roles.

497 Officer

- Responsible for certifying reimbursement claims.
- Manages the ETC Administrator user role in NLAD

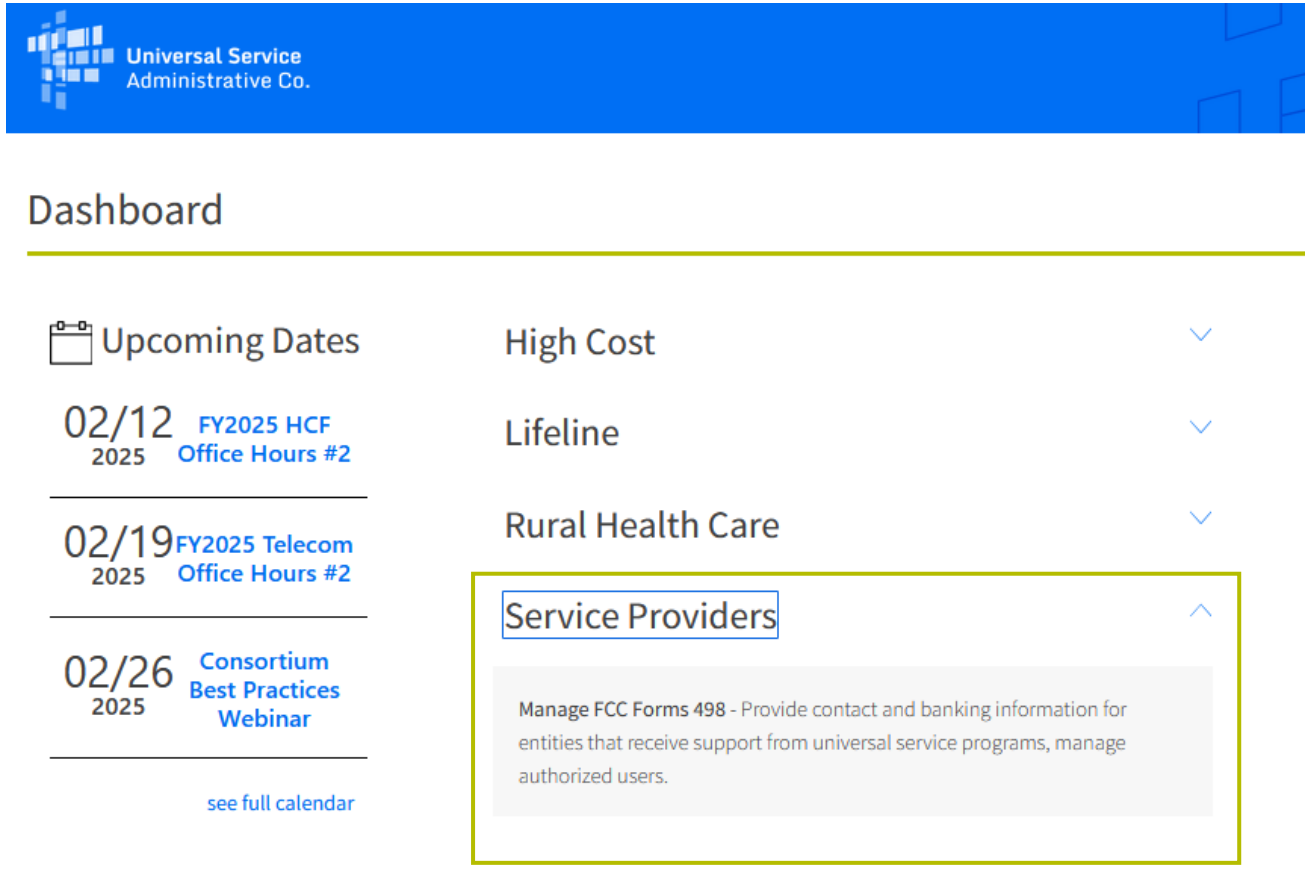
497 User

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

E-File

Access E-File

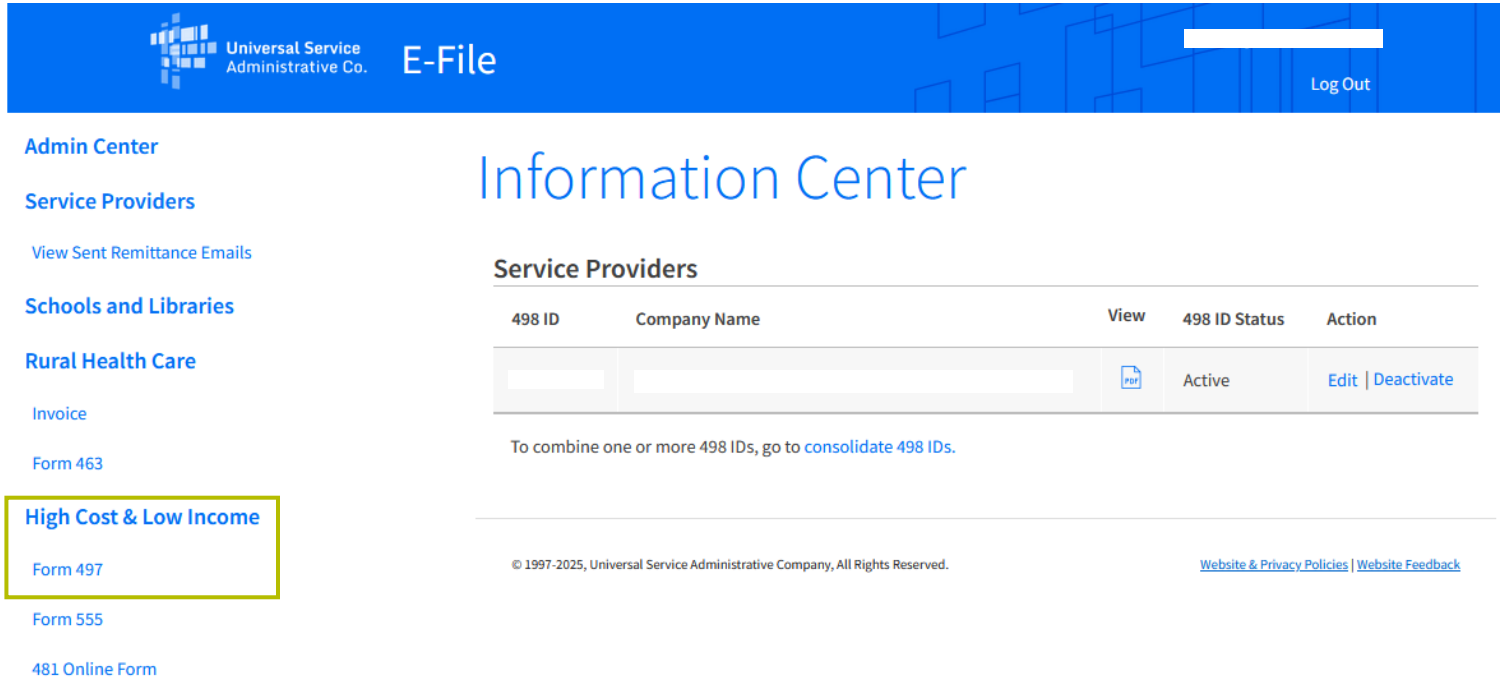
- To access E-File, 498 Officers should log into One Portal.
- From the homepage, select **Manage FCC Forms 498**.
  - This is located under the **Service Provider** section of the dashboard.



E-File

E-File Landing Page

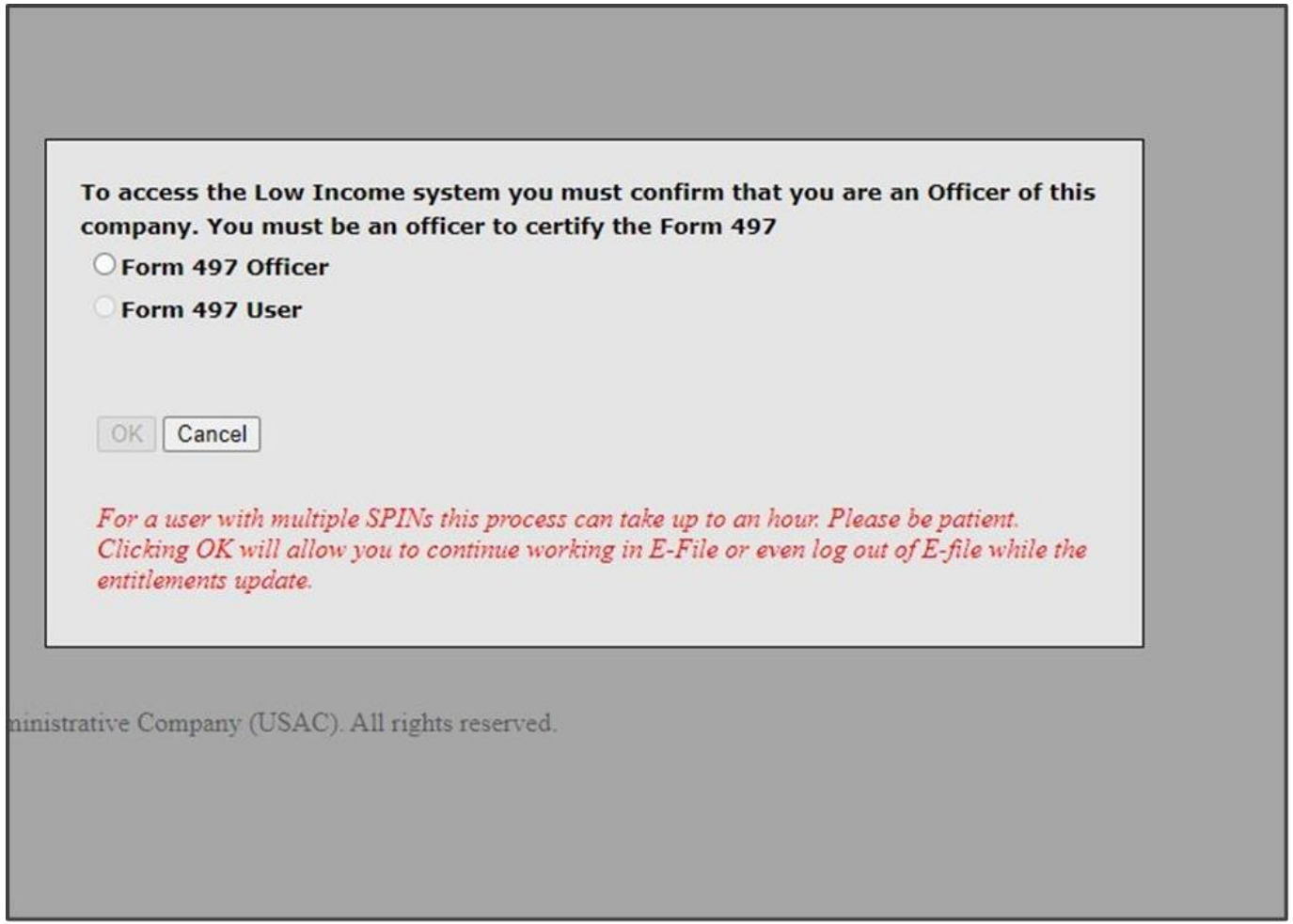
- To complete FCC Form 497, the 498 Officer should select **Form 497** from the navigation menu.



E-File

Certify 497 Entitlement

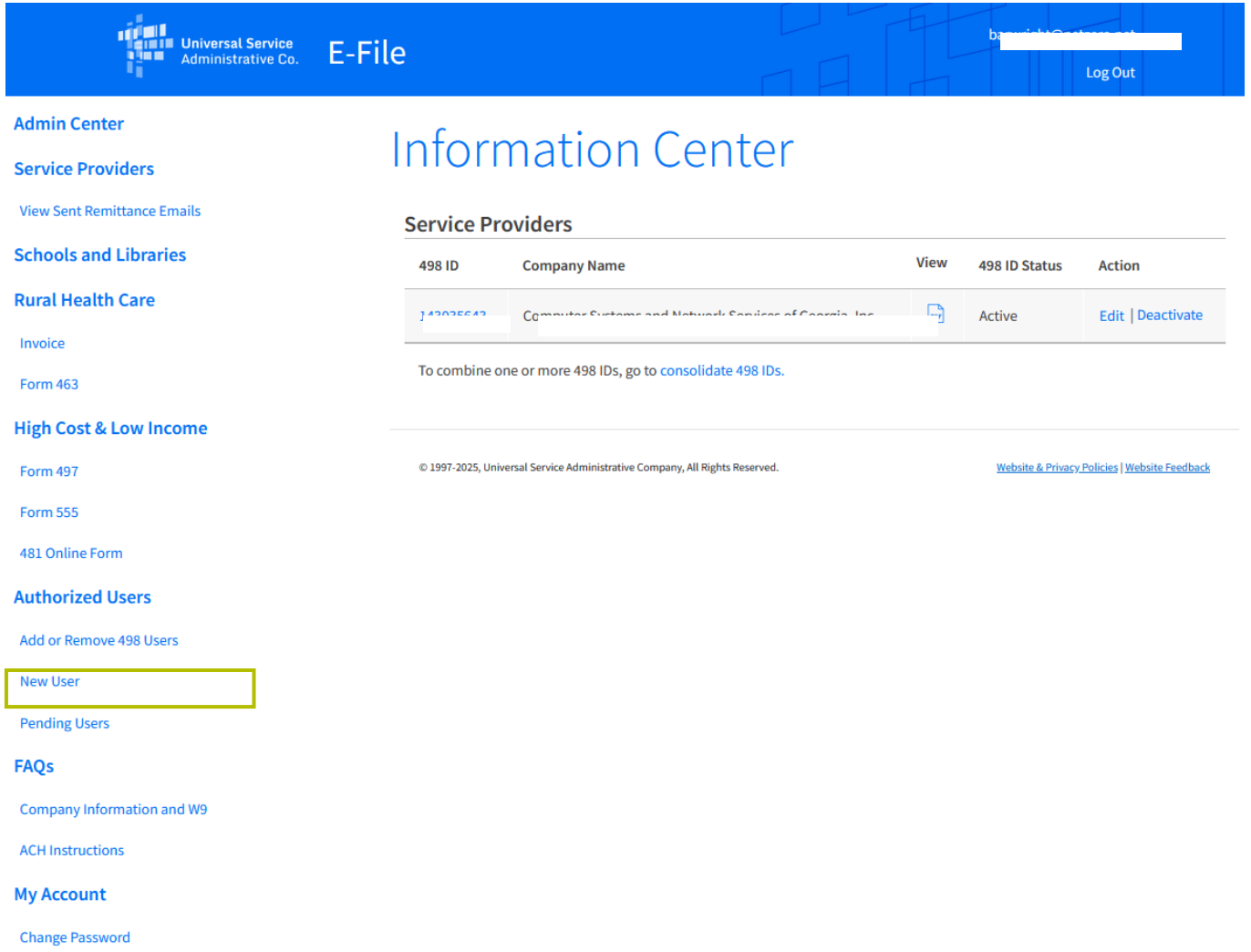
- Select either **Form 497 Officer** or **Form 497 User**.
- **Note**: 498 Officers with multiple Service Provider Identification Numbers (SPINS) may experience a wait time of up to one hour for E-File to update entitlements.



E-File

Create New User

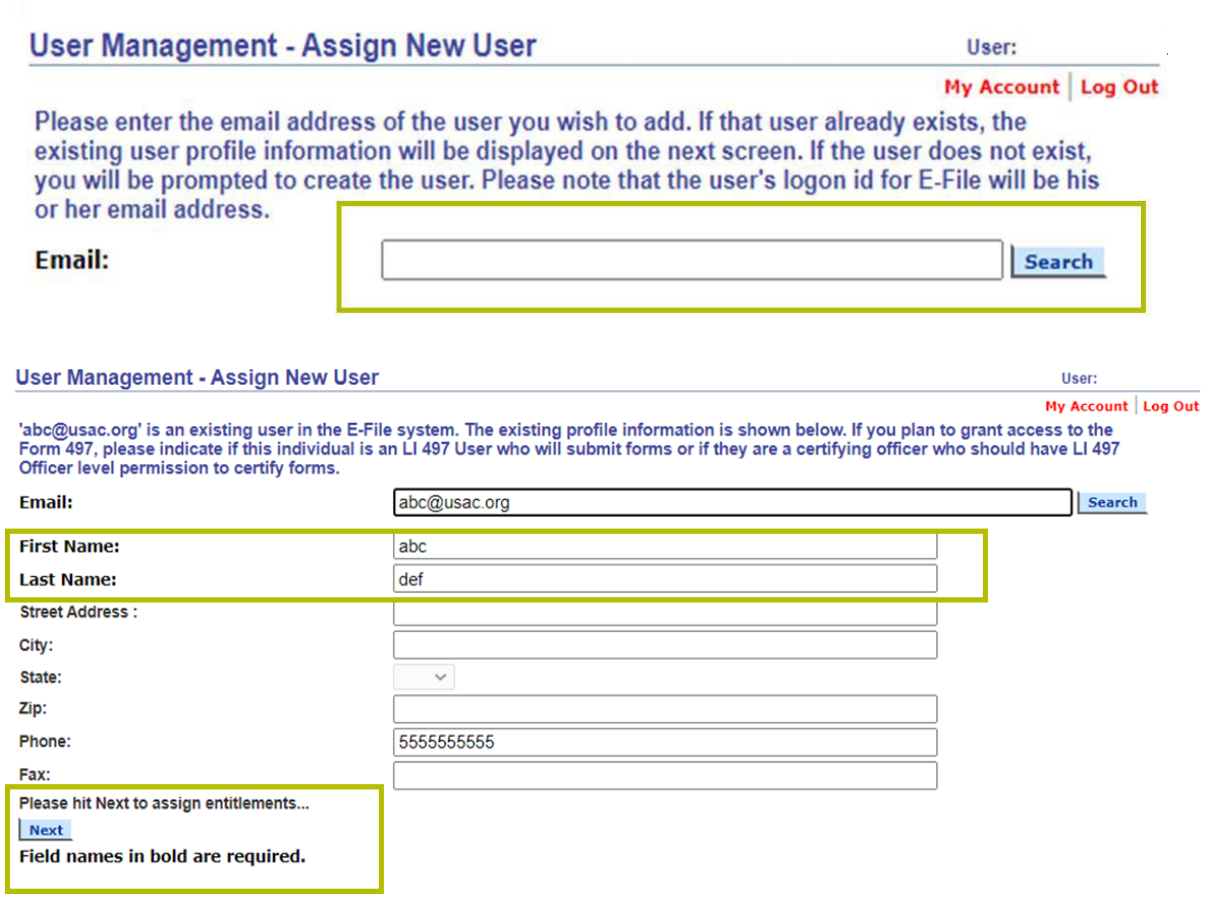
- From the E-File page, select **New User** under the **Authorized Users** section of the navigation menu.



E-File

Create 497 Officer (1/2)

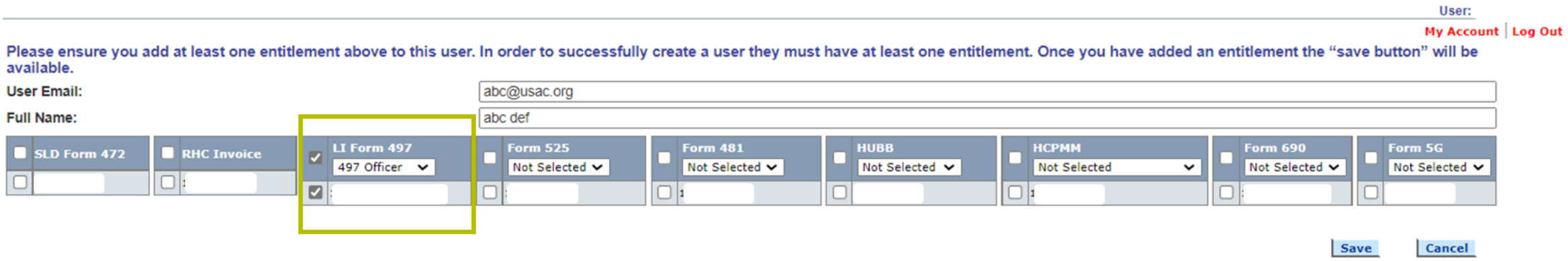
- Provide the **Email** of the user being assigned 497 Officer privileges and then select **Search**.
- Enter the user's **First Name** and **Last Name** in the highlighted fields.
  - This information is required. However, the address information of the user is not.
- Select **Next**.



E-File

Create 497 Officer (2/2)

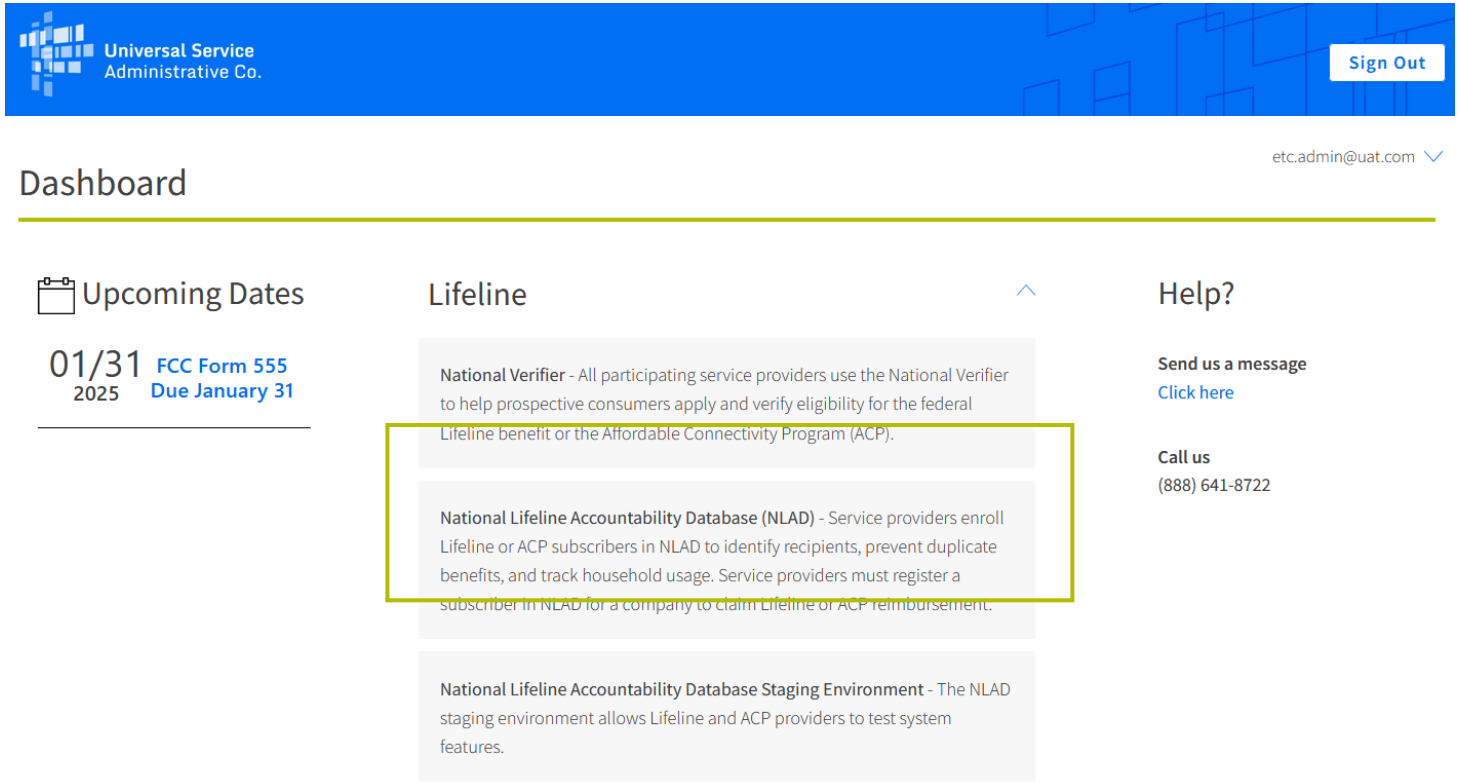
- Click the **LI Form 497** checkbox, and then select **497 Officer** from the dropdown menu.
- Click the checkbox for the SPIN(s) the user should have 497 Officer access to and then select **Save**.
- You will receive a confirmation message that the user was successfully added.



E-File

Create ETC Administrator (1/4)

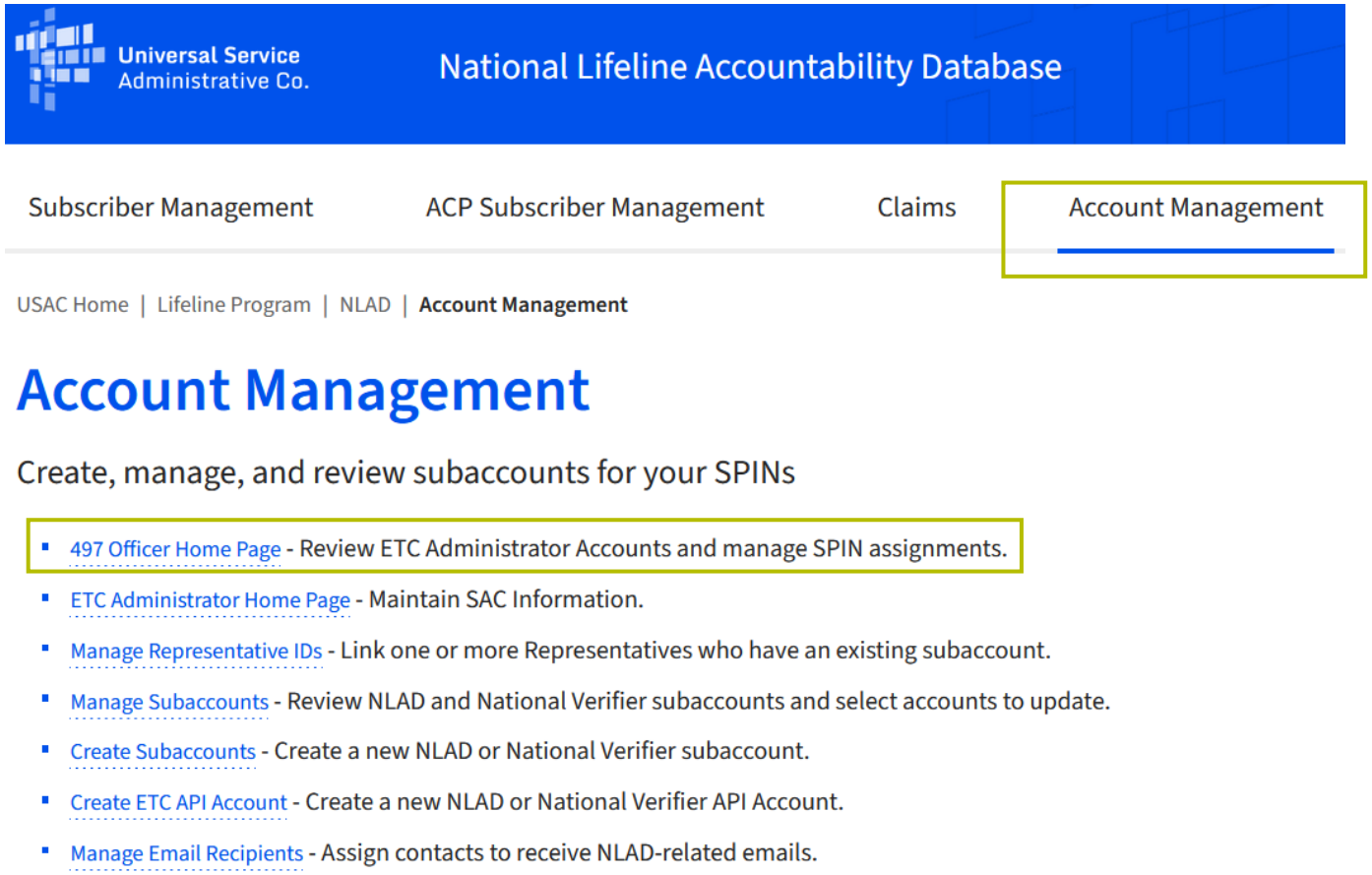
- To create the ETC Administrator user role, login to One Portal.
- Select **National Lifeline Accountability Database** (NLAD) from under the Lifeline section of the dashboard.



E-File

Create ETC Administrator (2/4)

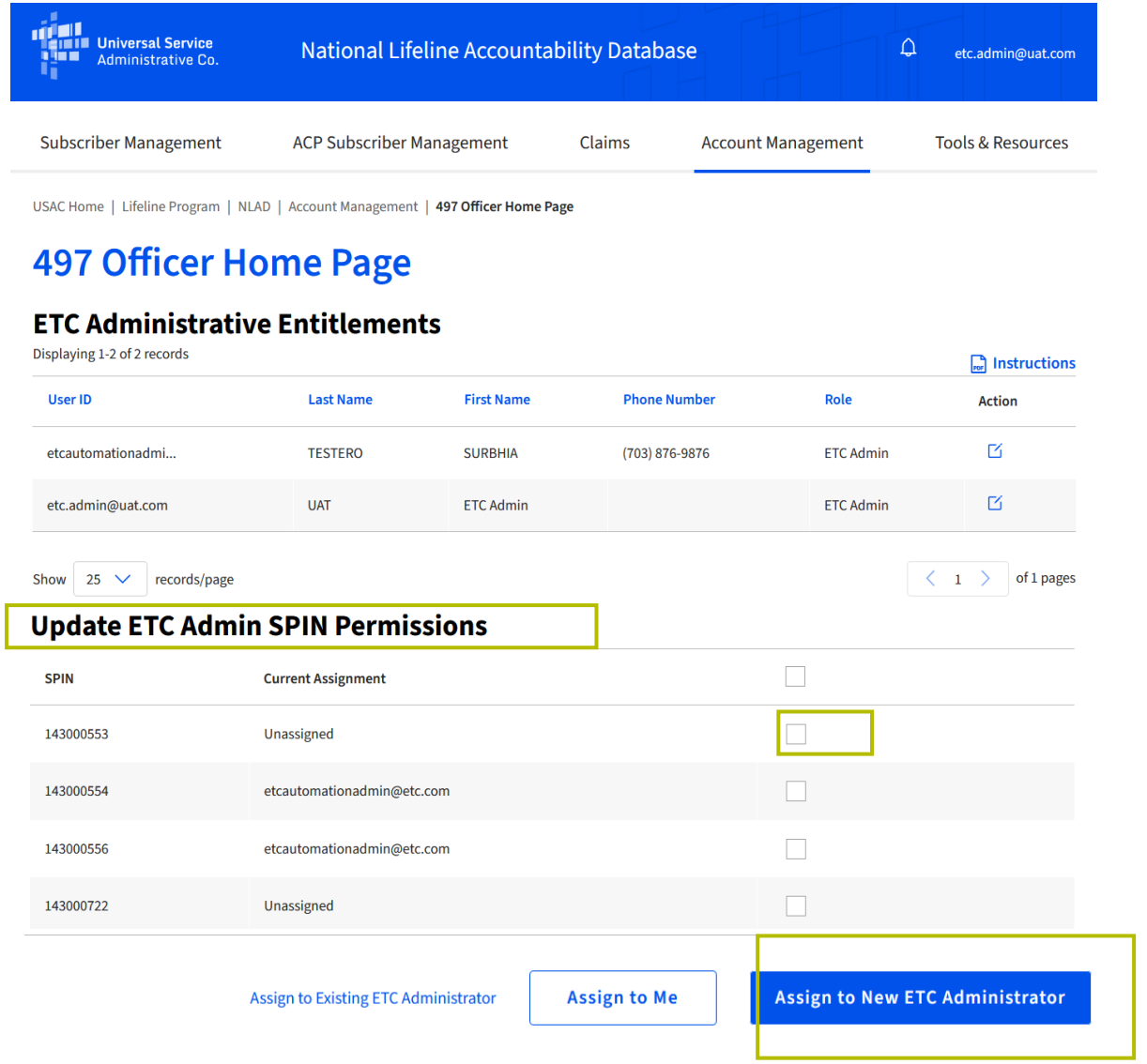
- Select **Account Management** from the header menu.
  - The page will automatically be updated to reflect a new menu under Account Management.
- Select **497 Officer Home Page** to continue with creating the ETC Administrator role.



E-File

Create ETC Administrator (3/4)

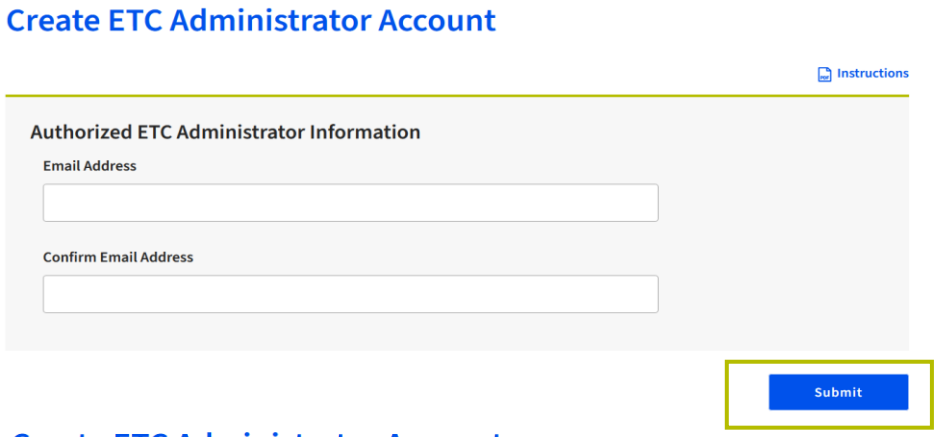
- From the **Update ETC Admin SPIN Permissions** section, select the SPIN(s) you would like to assign to the new ETC Administrator by ticking the corresponding box.
- Select **Assign to New ETC Administrator**.

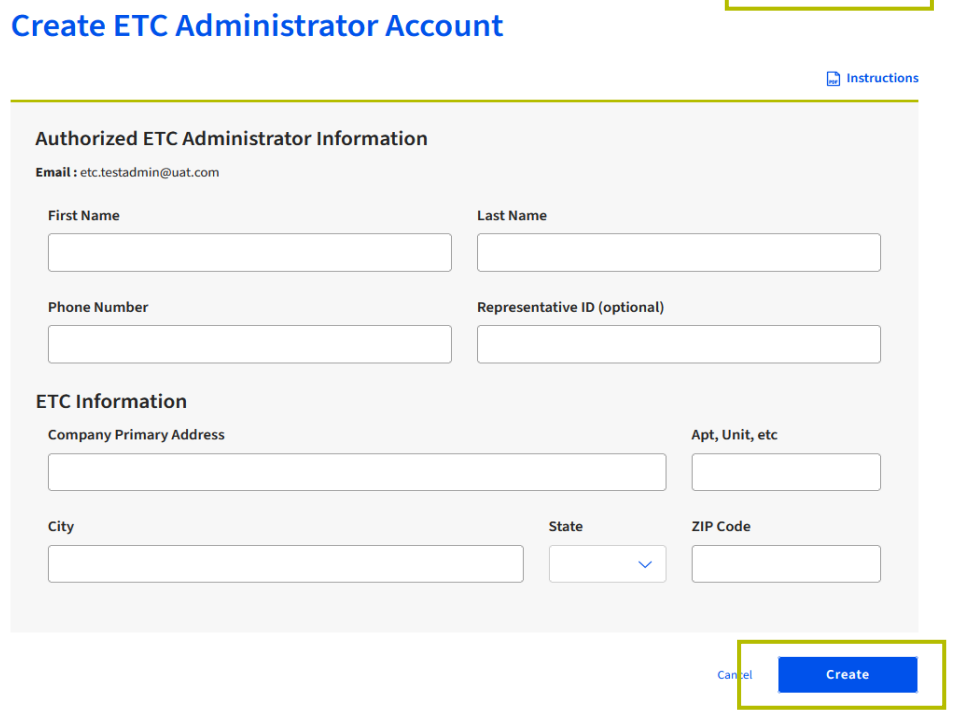


E-File

Create ETC Administrator (4/4)

- Enter the **email address** of the new ETC Administrator and **confirm their details**.
- Select **Submit**.
- Then provide the information requested in each empty field and select **Create**.
- You will receive a confirmation message that the user was successfully added as an ETC Administrator.





Questions?

Representative Accountability Database

Representative Accountability Database

Overview

- The Representative Accountability Database (RAD) is a registration system that validates the identities of service provider representatives performing transactions in NLAD and the National Verifier.
- All NLAD subaccounts, except the 497 Officer, are required to register for a **Representative ID** to verify their identity.
  - Once a user's identity is verified, RAD issues a unique 9-digit number called the **Representative ID** which connects them to the transactions they perform in NLAD and the National Verifier.
  - **Representative IDs should only be shared with the carrier(s) for which the representative works**.

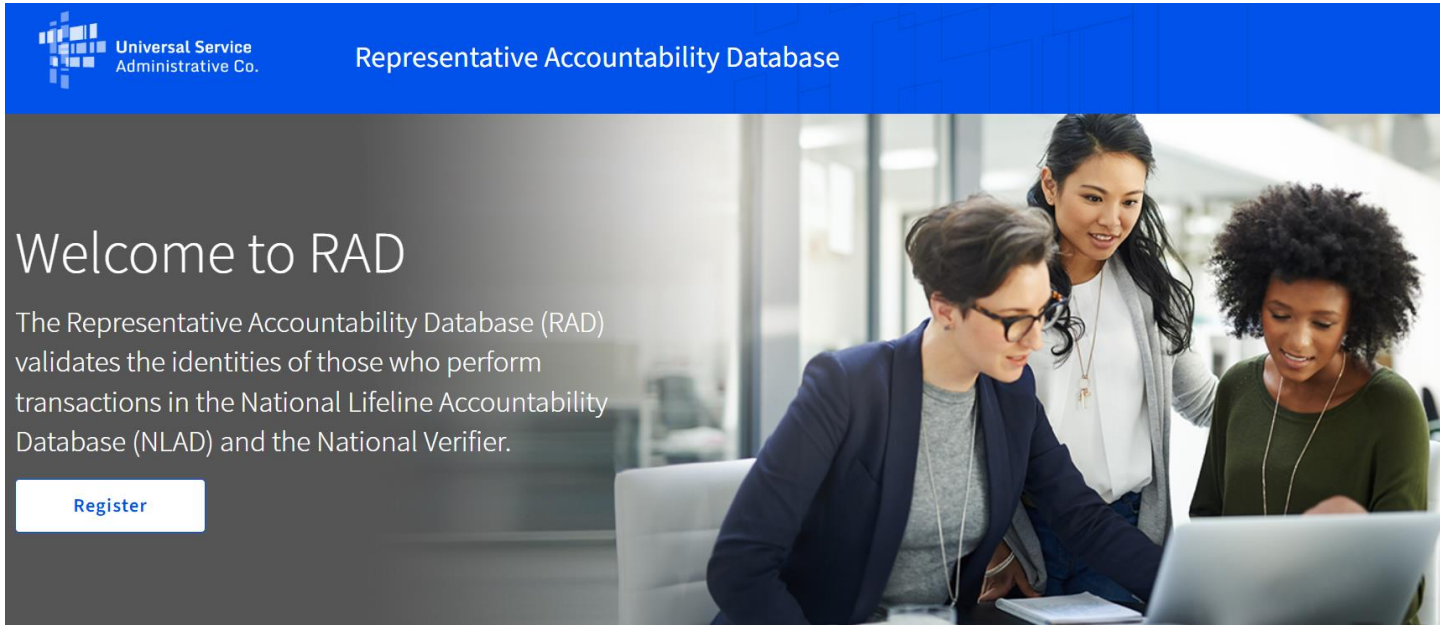
Representative Accountability Database
Registration & User Roles

- RAD registration is a two-step process:
  1. Representatives self-register for a Representative ID, which is needed to perform transactions in NLAD and the National Verifier.
  2. Once a representative has received their Representative ID, they are required to provide it to their 497 Officer or ETC Administrator.
     - The 497 Officer or ETC Administrator will use the Representative ID to create the representative's NLAD and National Verifier account credentials.
- Once the account credentials and Representative ID are linked, users can perform transactions in NLAD and the National Verifier. These users are:
  - ETC Administrators
  - ETC Analysts
  - ETC Operations
  - ETC Agents

Representative Accountability Database

Register Online

Representatives can begin the registration process at LifelineRad.org.



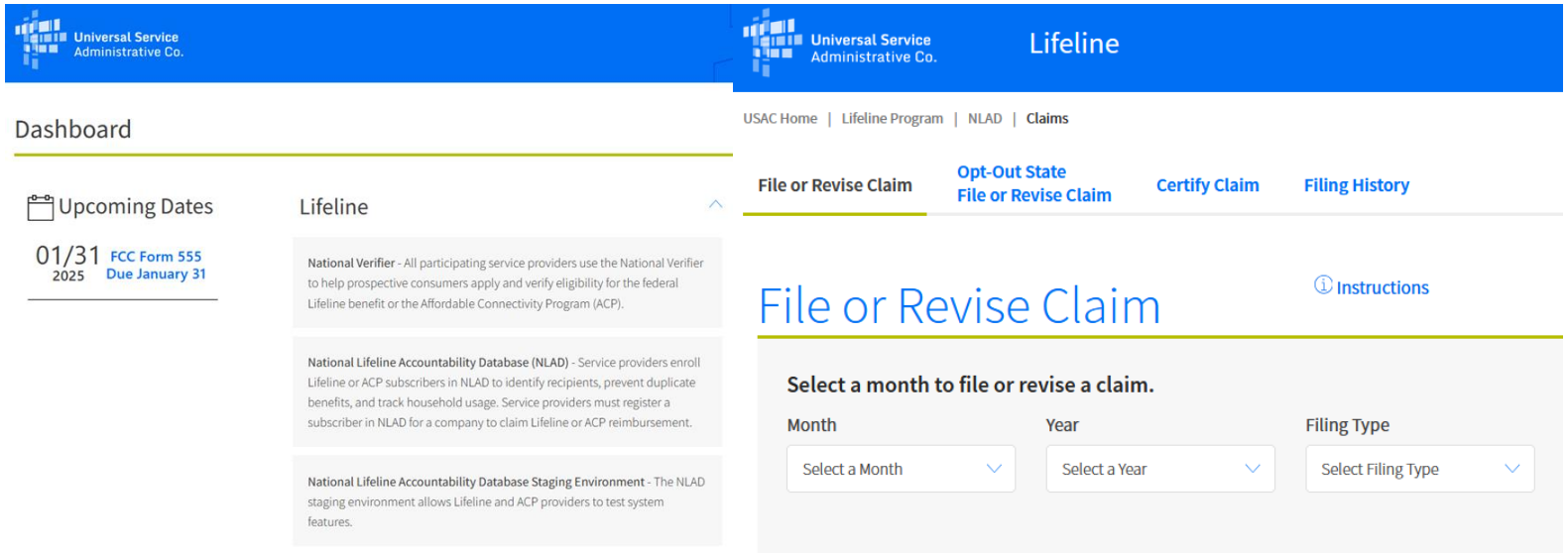
Representative Accountability Database
Resources

- For additional information on RAD, view the following:
  - The Representative Accountability Database 101 webinar
  - USAC's RAD page which provides a detailed overview of RAD and lists important links on how to register and manage representative IDs
  - The RAD Resources page which lists frequently asked questions and has an instructional video

National Lifeline Accountability Database

National Lifeline Accountability Database
Overview

- NLAD is used to enroll Lifeline-eligible consumers and manage existing subscribers' benefits.
- Once a consumer qualifies for the Lifeline program through the National Verifier, their service provider must enroll them using NLAD so that the subscriber can receive the benefit and so that service providers can claim reimbursements.
  - NLAD is available in all states except for California*, Oregon, and Texas, which are considered *NLAD opt-out states*.



National Lifeline Accountability Database
Account Types and Functions

- NLAD has 4 account types and functions:
  - **497 Officers** are responsible for certifying claims and overseeing the ETC Administrator user role.
  - **ETC Administrators** manage all sub-accounts (Analyst, Operations, and Agent roles) and can perform subscriber transactions, query subscriber data, and view reports.
    - These users can also access the National Verifier to check consumer eligibility.
  - **ETC Analysts** can perform subscriber transactions, query subscriber data, view reports in NLAD, and can use National Verifier to confirm consumer eligibility.
  - **ETC Operations** users can query data and view reports in NLAD, as well as use National Verifier to confirm consumer eligibility.
  - **ETC Agents do not** have access to NLAD and can only use National Verifier to confirm consumer eligibility.

National Lifeline Accountability Database
Transaction Types

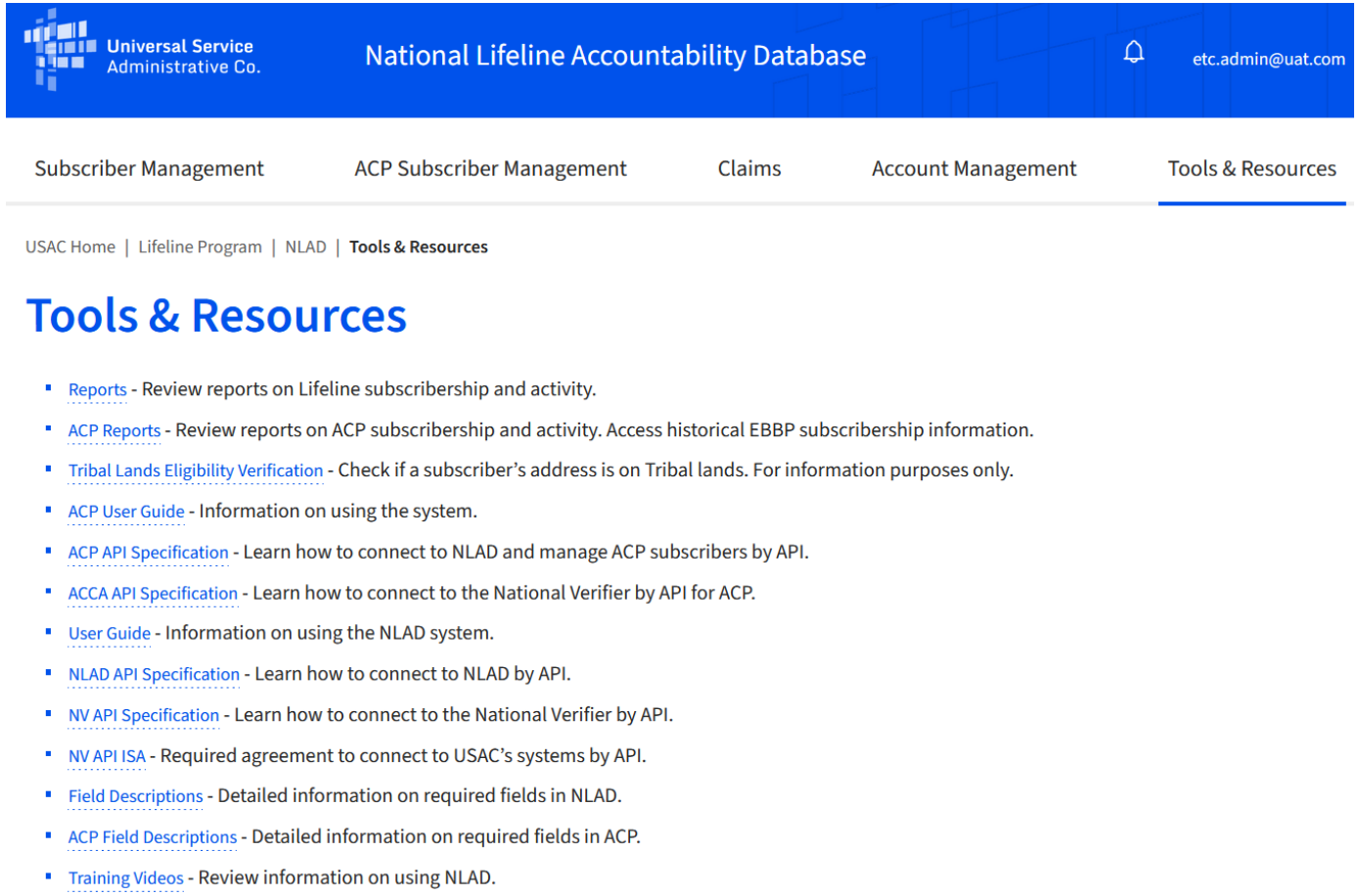
- Users can perform 5 types of transactions in NLAD to manage subscribers:
  - **Verify**: Allows providers to pre-validate whether a subscriber transaction would successfully process in NLAD
  - **Enroll**: Enrolls new subscribers in Lifeline and adds them to the service provider's NLAD subscriber records
  - **Transfer**: Transfers existing Lifeline subscribers from their current service provider in NLAD to allow the transacting provider to provide Lifeline service to the subscriber
  - **Update**: Allows providers to update subscriber information such as contact information
  - **De-Enroll**: Removes or de-enrolls subscribers from NLAD who no longer receive the Lifeline benefit

National Lifeline Accountability Database
Subscriber Management

- Service providers can manage subscribers in NLAD using the following methods:
  - **Individual Transactions (Portal)**: Providers can perform individual transactions for one consumer at a time using the NLAD user interface (UI), which is accessible via One Portal.
  - **Bulk Upload**: Providers can add or update many subscribers at once by using a bulk upload 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 and automatically pull reports.
    - To use the NLAD API, service providers must have a signed Interconnection Security Agreement (ISA) with USAC.

National Lifeline Accountability Database
Resources

- Additional resources are available in the **Tools & Resources** section of NLAD and include some of the following:
  - Reports
  - User Guide
  - NLAD API Specifications
  - Field Descriptions
- For common questions about NLAD, review the NLAD FAQs.



Questions?

National Verifier

National Verifier

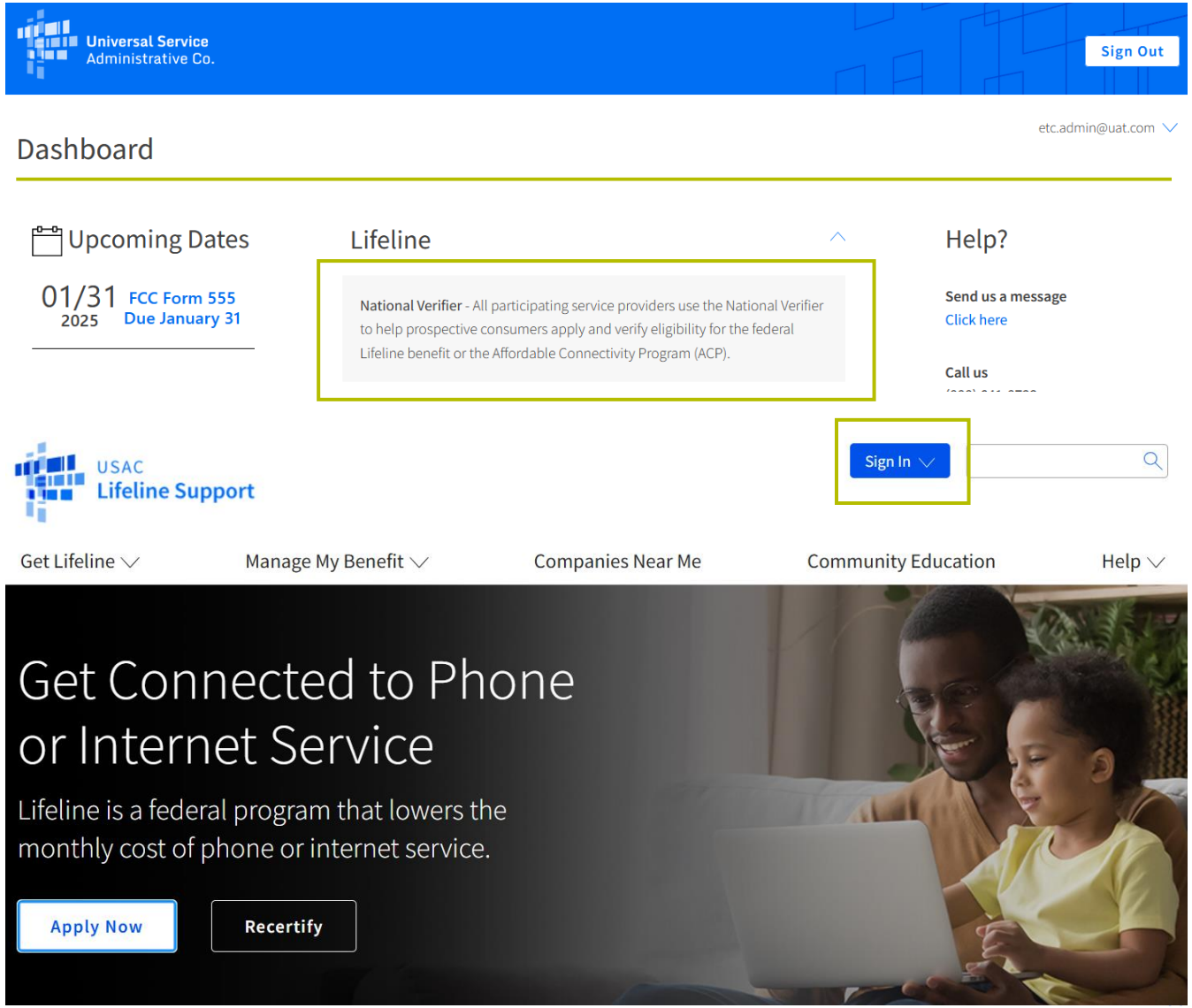
Overview

- The National Verifier is Lifeline's centralized application system that determines whether consumers are eligible for Lifeline.
- Service providers in all 56 states and territories (except in NLAD opt-out states (California*, Texas, and Oregon) helping consumers apply to Lifeline, must use the National Verifier.
- Both service providers and consumers have access to the National Verifier.
  - Service providers can use the National Verifier service provider portal to help consumers complete an application.
  - Consumers can use the National Verifier to apply for Lifeline using the online application.

National Verifier

Access National Verifier

- The National Verifier can be found online at LifelineSupport.org.
  - Service providers can click the **Sign In** button to be redirected to the sign-in page for access to the system.
  - Consumers can select **Apply Now** to begin their application.
- Service providers can also access National Verifier from the One Portal dashboard.



Available for Public Use

Poll

Lifeline Claims System

Lifeline Claims System

Overview

- The Lifeline Claims System (LCS) is the online filing system that service providers use to receive reimbursements for offering Lifeline-supported services to eligible consumers.
- After providing eligible consumers with Lifeline-supported service, service providers must submit claims to receive reimbursement.
- Service providers must submit one reimbursement claim for each month they are claiming support through LCS.
- Service providers have up to one year after the data month to submit original claims and upward revisions.

Lifeline Claims System Overview

Review Claims

Download and review the list of subscribers eligible for reimbursement.

Complete Claims Template

Populate and submit the template with necessary information about subscribers.

Certify Claims

Certify claims submissions within one year of the snapshot date (taken on 1st of the month).

Lifeline Claims System
Reimbursement

- Service providers must submit one reimbursement claim for each month they claim support, even if there are no subscriber changes within the last month.
- A snapshot is taken in NLAD on the 1st of the month and shows the total number of subscribers eligible for reimbursement for the prior month.
  - For example, a snapshot taken on March 1, 2025, shows the subscribers eligible for reimbursement for the February 2025 data month.
- In NLAD opt-out states (California, Oregon, and Texas) service providers can only claim subscribers listed on the file in LCS provided by their state Public Utility Commission (PUC).
- Claims certified by the 8th of the month are processed for reimbursement in the same month.

Lifeline Claims System

User Roles and Responsibilities

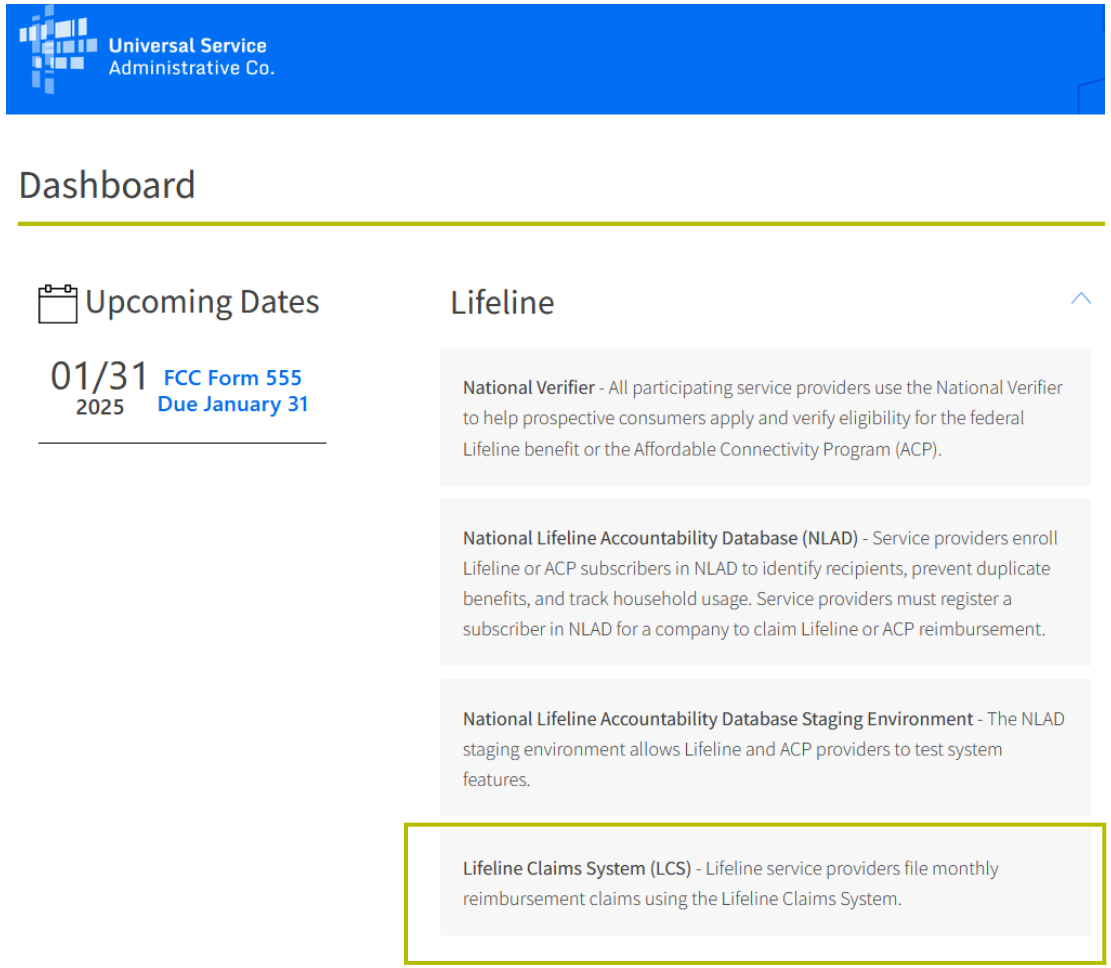
497 Officer	497 User
• Must certify reimbursement claims, and can upload, modify, and submit claims.	• Can upload, modify, and submit claims, but **cannot** certify claims.

As a reminder, the 497 Officer and 497 User roles are assigned and managed in E-File, which can be accessed through USAC's One Portal system.

Lifeline Claims System

LCS Access

- Service providers can access LCS from the One Portal dashboard.
  - **Reminder**: LCS users must have 497 Officer or 497 User credentials to access LCS.



Lifeline Claims System
Resources

- For more information on the LCS, view:
  - Lifeline Claims System (LCS)
  - Lifeline Claims System User Guide
  - Reimbursement FAQs
  - LCS Upload Field Descriptions
- For instructional videos, view:
  - How to Submit Claims in LCS in NLAD States
  - How to Submit Claims in LCS in NLAD Opt-Out States
- Email Form497@usac.org for questions about claims and disbursements.

Questions?

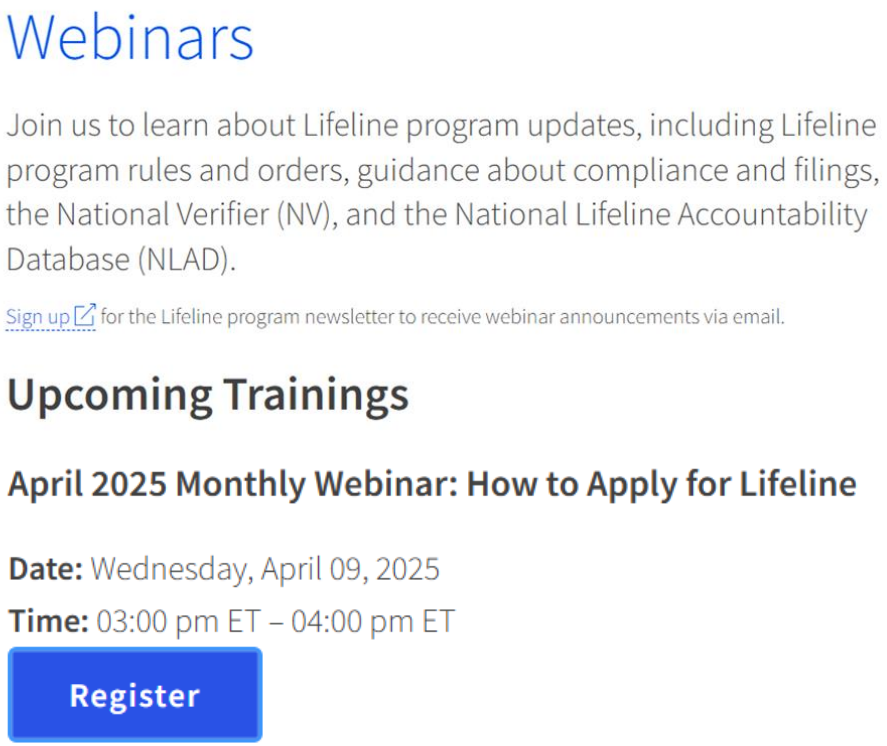
Resources

- Visit usac.org/lifeline for general program information.
- Email LifelineProgram@usac.org for technical support and additional information on processes, rules, and requirements.
- Visit Lifeline's Webinars page to review past trainings and register for upcoming events.

April Webinar

Register for the next Lifeline webinar.

- **Date**: April 9, 2025
- **Time**: 3:00 p.m. ET – 4:00 p.m. ET
- **Topic**: How to Apply for Lifeline



Available for Public Use

Thank You!

Available for Public Use

Universal Service
Administrative Co.