Schools and Libraries (E-rate) Program

EPC User Guide: Customer Service

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SCHOOLS AND LIBRARIES (E-RATE) PROGRAM

Last Modified: February 2017

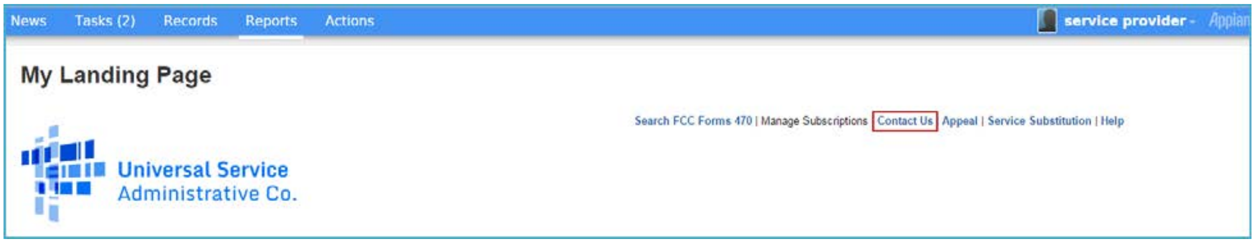
Customer Service in the E-rate Productivity Center (EPC)

Create a Customer Service Case

1. Click the **Contact Us** link in the upper right menu on your landing page.

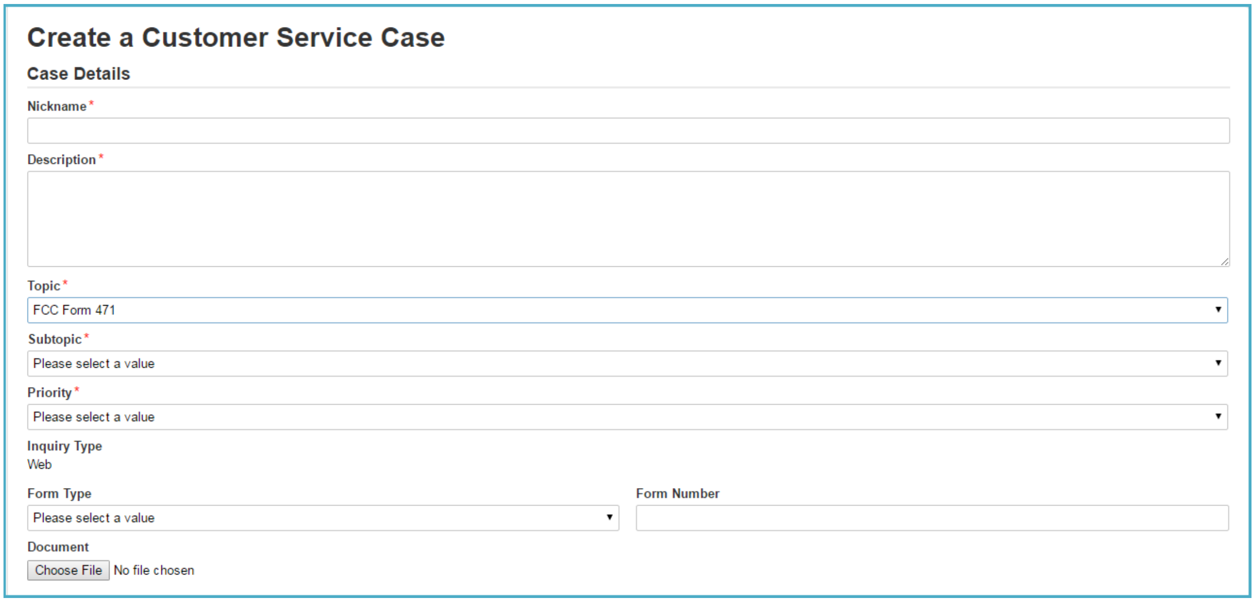
Applicant Account:

Service Provider Account:

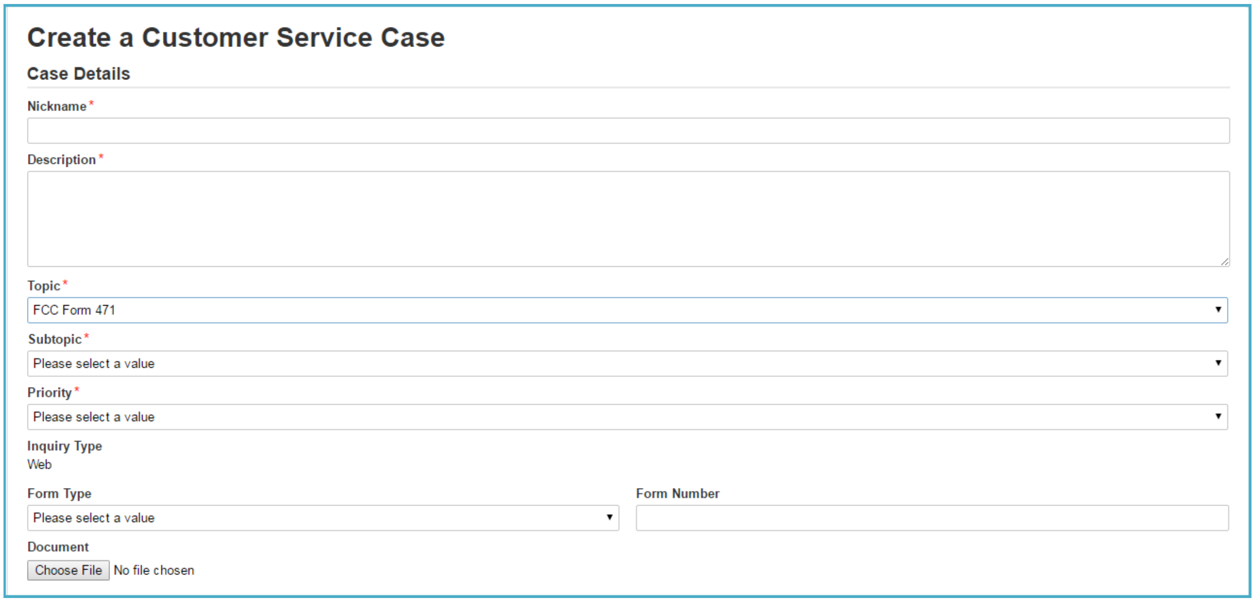


NOTE: There is also a **Contact Us** link in the **Actions** menu of your EPC account.

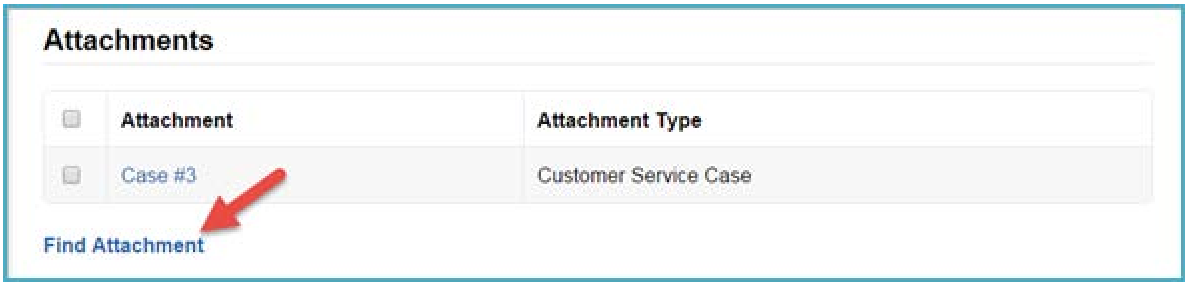
Case Details



2. Enter the **Case Details**:
    - **Nickname** for the case
    - **Description**
3. Select a **Topic** and **Subtopic** and **Priority** for the customer service case from the drop-down menus.
4. Click the **Choose File** button to attach any relevant files.

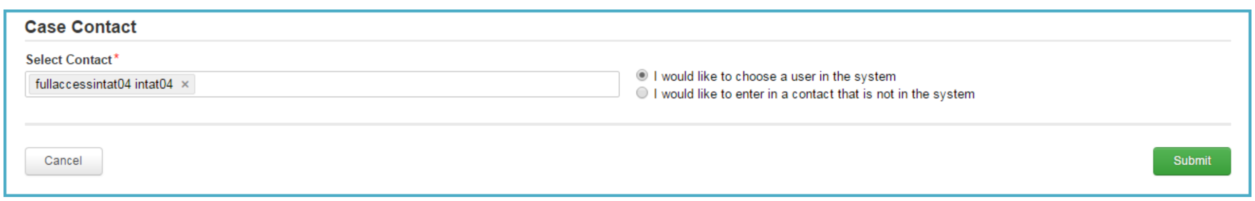


5. You can also attach files that are already in EPC, for example, forms or other customer service cases. To add an attachment, click **Find Attachment**.

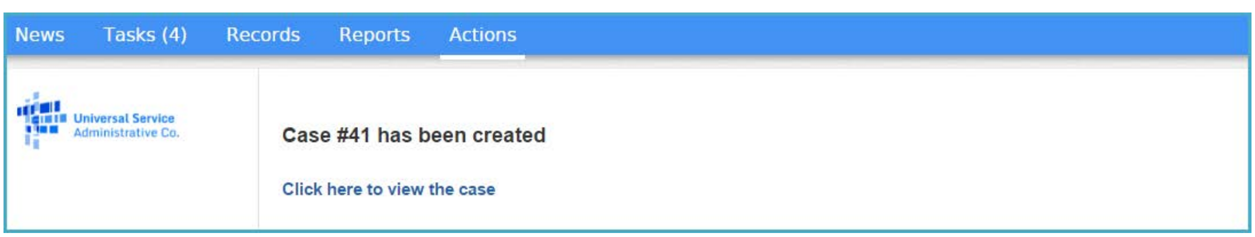


6. Select the **Attachment Type** from the drop-down menu.
7. Choose the attachment from the list and click **Add Attachments**. Repeat for additional attachments as needed.

8. Enter the contact information for the case. The system will automatically enter your information by default. To remove yourself from the list, click the **x** next to your username.



9. Select whether the case contact is someone who is already in the system or a new contact who you would like to enter contact information for. Enter their information.
10. Click **Submit**.

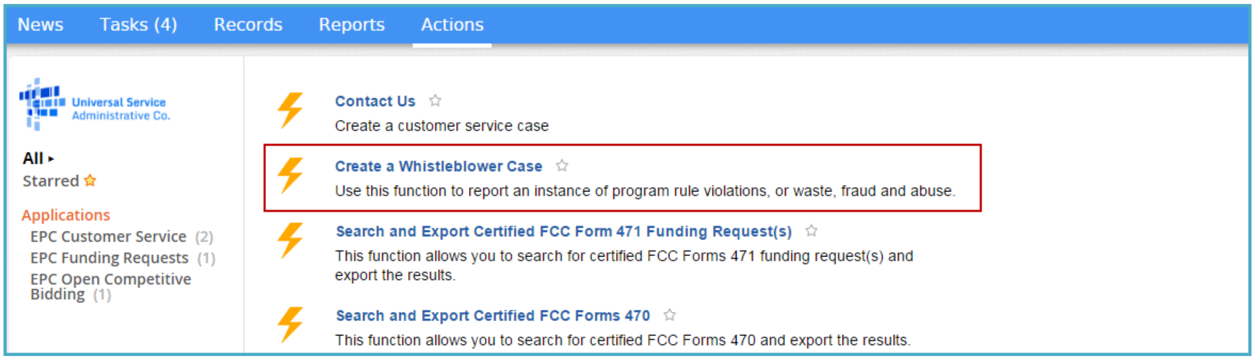


The system will display your case number. You can review the case by clicking the link. The system may take up to one minute to display your uploaded documents. Refresh the page if necessary.

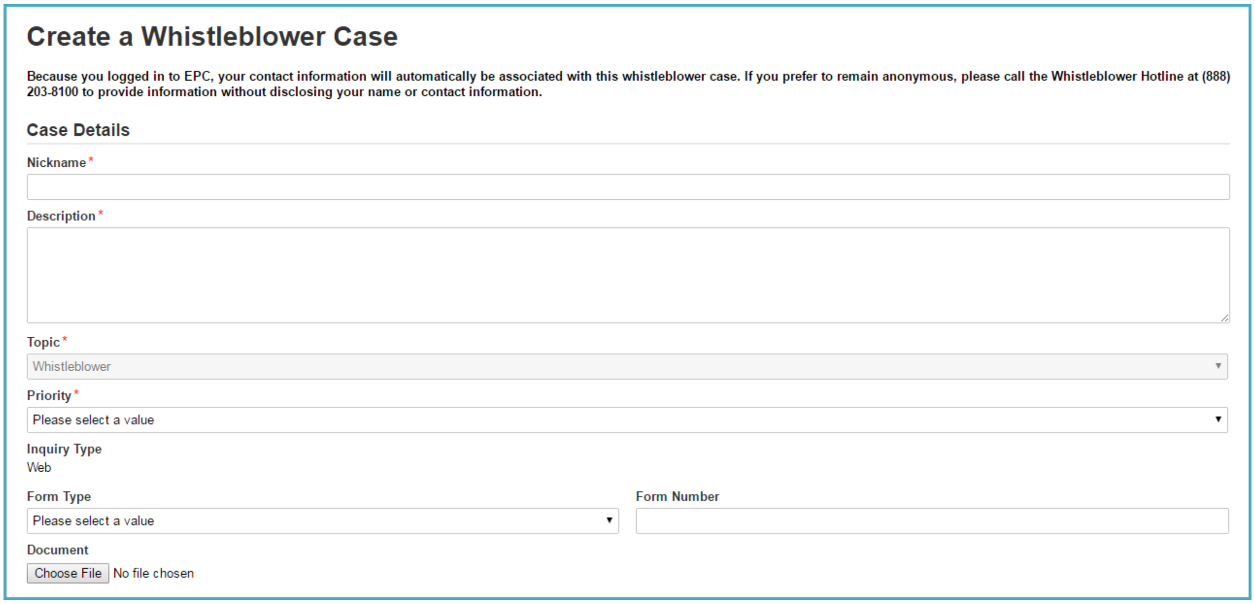
Create a Whistleblower Case

Because you are logged in to EPC, your contact information will automatically be associated with this whistleblower case. If you prefer to remain anonymous, please call the Whistleblower Hotline at (888) 203-8100 to provide information without disclosing your name or contact information.

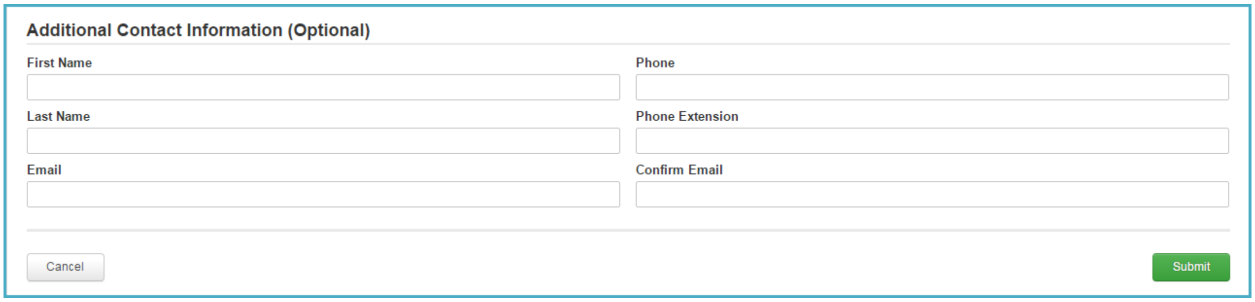
1. Go the **Actions** tab on your landing page.
2. Select **Create a Whistleblower Case**.



3. Enter the case details as needed:
   - **Nickname**
   - **Description**
   - **Topic**
   - **Priority**
   - **Form Type**
   - **Form Number**
4. Click the **Choose File** button to attach documents as needed.



5. Enter additional contact information (optional).



6. Click **Submit**.

View Your Whistleblower Cases

You can view whistleblower cases you have created.

Select **Records** in the main menu, and then select the link for **Whistleblower Cases**.