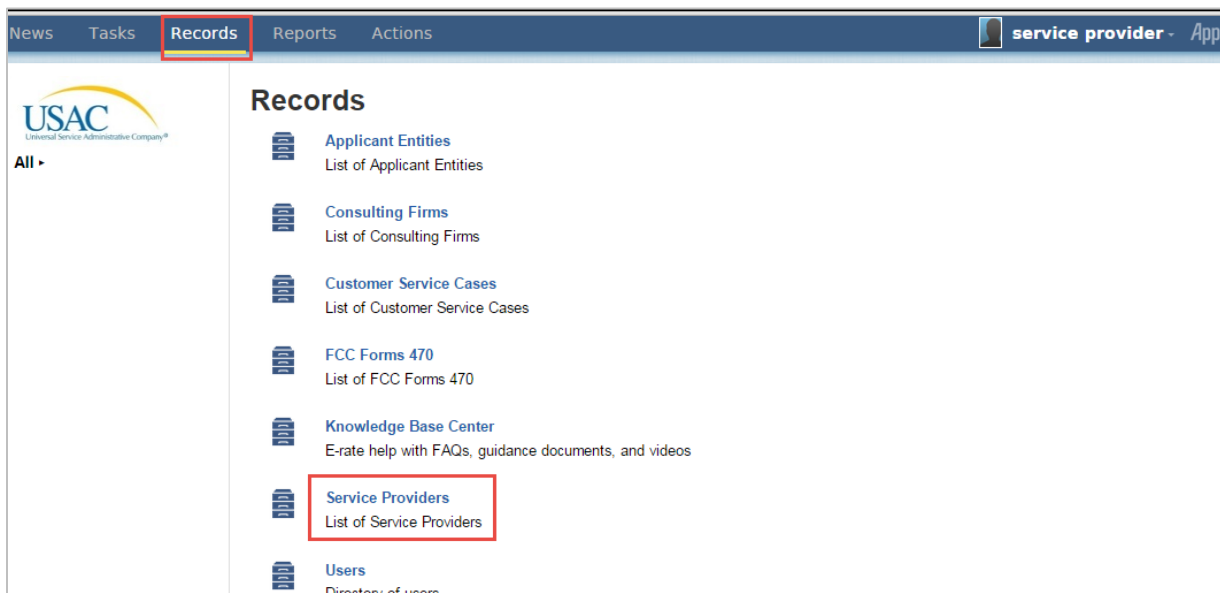


# E-RATE PRODUCTIVITY CENTER (EPC) SERVICE PROVIDER USER GUIDE

## Managing Your Organization

### Modify Account Administrator

1. On the main menu, select **Records**.

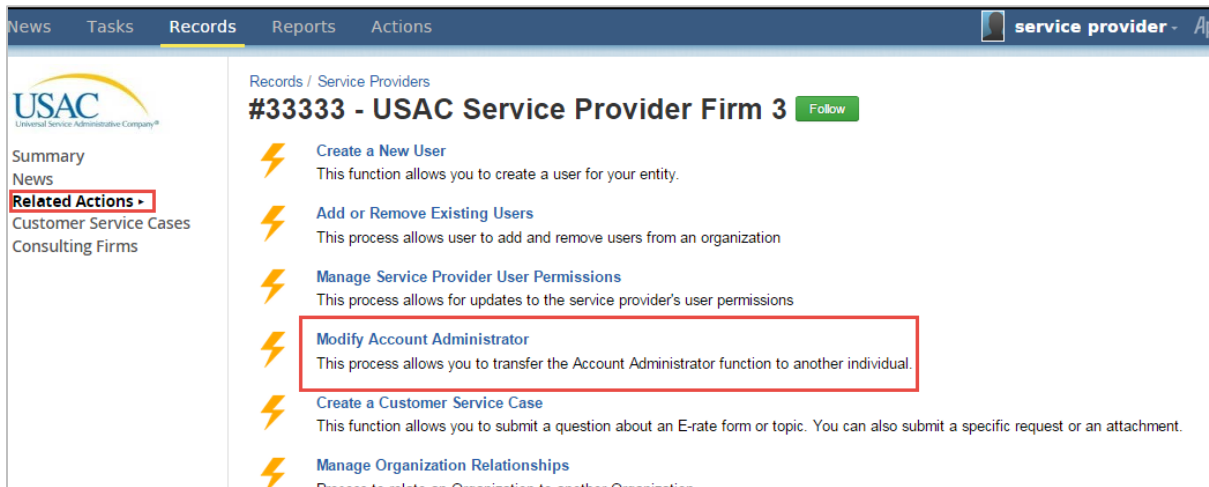


2. Select **Service Providers**.
3. Locate your service provider organization in the list or use the search function.



**DISCUSSED IN THIS GUIDE:** Modifying account administrators, managing organization relationships

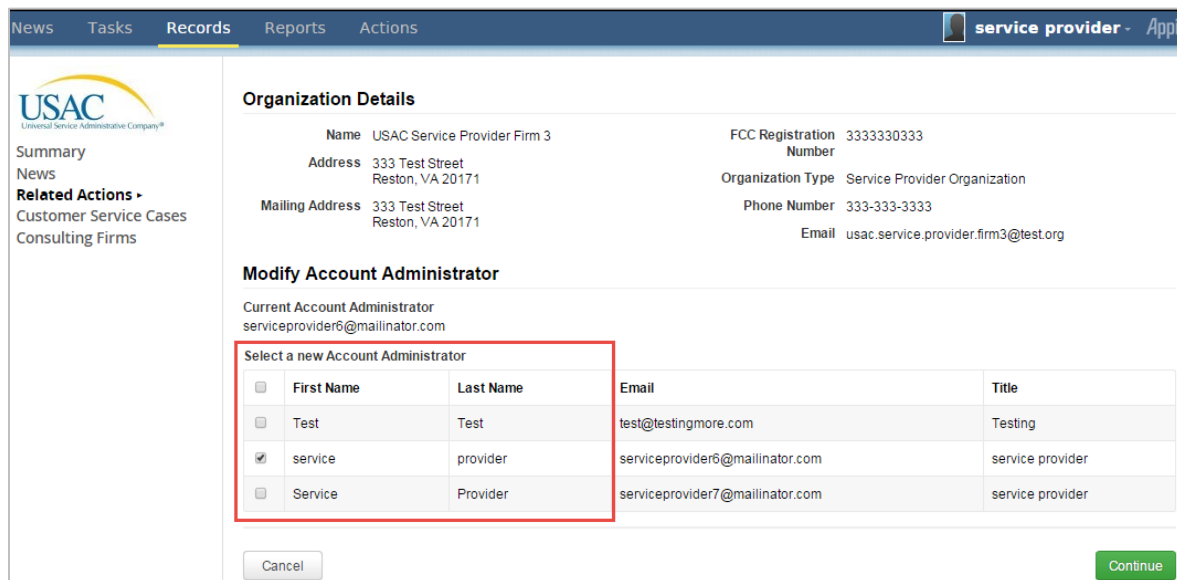
4. Select the link to your organization.
5. Select **Related Actions**.
6. Select **Modify Account Administrator**.



Records / Service Providers  
**#33333 - USAC Service Provider Firm 3** Follow

- Create a New User**  
This function allows you to create a user for your entity.
- Add or Remove Existing Users**  
This process allows user to add and remove users from an organization
- Manage Service Provider User Permissions**  
This process allows for updates to the service provider's user permissions
- Modify Account Administrator**  
This process allows you to transfer the Account Administrator function to another individual.
- Create a Customer Service Case**  
This function allows you to submit a question about an E-rate form or topic. You can also submit a specific request or an attachment.
- Manage Organization Relationships**  
Process to relate an Organization to another Organization.

7. The organization details open displaying users. To change the account administrator, uncheck the box for the current administrator if necessary, then select the new administrator from the list.



Organization Details

Name USAC Service Provider Firm 3      FCC Registration Number 3333330333  
 Address 333 Test Street, Reston, VA 20171      Organization Type Service Provider Organization  
 Mailing Address 333 Test Street, Reston, VA 20171      Phone Number 333-333-3333  
 Email usac.service.provider.firm3@test.org

**Modify Account Administrator**

Current Account Administrator  
 serviceprovider6@mailinator.com

<input type="checkbox"/>	First Name	Last Name	Email	Title
<input type="checkbox"/>	Test	Test	test@testingmore.com	Testing
<input checked="" type="checkbox"/>	service	provider	serviceprovider6@mailinator.com	service provider
<input type="checkbox"/>	Service	Provider	serviceprovider7@mailinator.com	service provider

Cancel      Continue

8. Select **Continue**.
9. Confirm the new account administrator information on the next page, then select **Submit**.

## Manage Organization Relationships

Any organization modifications will need approval by the Client Service Bureau.

### Add a Consulting Firm


1. On the main menu, select **Records**.

**DISCUSSED IN THIS GUIDE:** Modifying account administrators, managing organization relationships

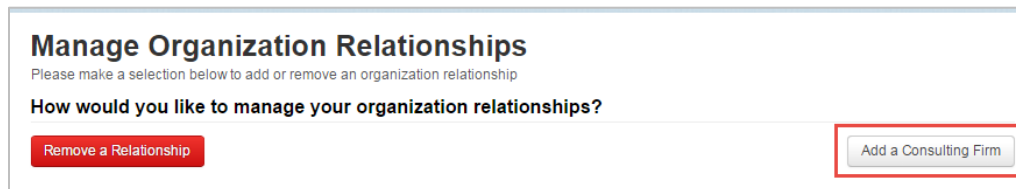
2. Select **Service Providers**.
3. Locate your service provider organization in the list or use the search function.
4. On the left-hand menu, select **Related Actions**.
5. Select **Manage Organization Relationships**.



Records / Service Providers  
#33333 - USAC Service Provider Firm 3 Follow

-  **Create a New User**  
This function allows you to create a user for your entity.
-  **Add or Remove Existing Users**  
This process allows user to add and remove users from an organization
-  **Manage Service Provider User Permissions**  
This process allows for updates to the service provider's user permissions
-  **Modify Account Administrator**  
This process allows you to transfer the Account Administrator function to another individual.
-  **Create a Customer Service Case**  
This function allows you to submit a question about an E-rate form or topic. You can also submit a specific request or an attachment.
-  **Manage Organization Relationships**  
Process to relate an Organization to another Organization

6. Select **Add Consulting Firm**.

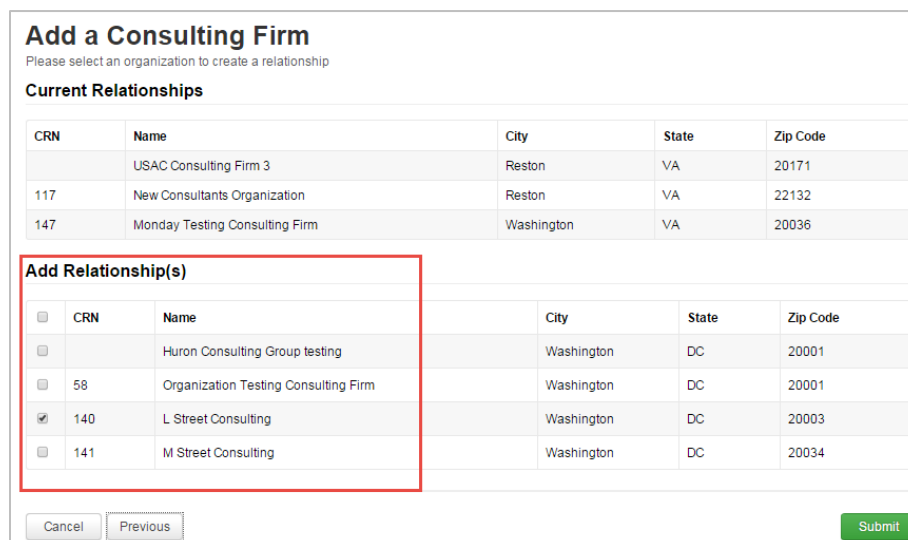


**Manage Organization Relationships**  
Please make a selection below to add or remove an organization relationship

How would you like to manage your organization relationships?

Remove a Relationship Add a Consulting Firm

7. On the **Add a Consulting Firm** page, enter search information for the consulting firm, for example, consultant registration number (CRN), name, state, or zip code.
8. Click **Search**.
9. The list of current relationships opens, and a list of matching consulting firms is shown. Select the consulting firm from the **Add Relationships** list.
10. Select **Submit**.



**Add a Consulting Firm**  
Please select an organization to create a relationship

**Current Relationships**

CRN	Name	City	State	Zip Code
	USAC Consulting Firm 3	Reston	VA	20171
117	New Consultants Organization	Reston	VA	22132
147	Monday Testing Consulting Firm	Washington	VA	20036

**Add Relationship(s)**

<input type="checkbox"/>	CRN	Name	City	State	Zip Code
<input type="checkbox"/>		Huron Consulting Group testing	Washington	DC	20001
<input type="checkbox"/>	58	Organization Testing Consulting Firm	Washington	DC	20001
<input checked="" type="checkbox"/>	140	L Street Consulting	Washington	DC	20003
<input type="checkbox"/>	141	M Street Consulting	Washington	DC	20034

Cancel Previous Submit

DISCUSSED IN THIS GUIDE: Modifying account administrators, managing organization relationships

11. The account administrator for the new consulting firm will receive a notification in their news feed with the new organization relationship.

## Remove a Relationship

1. On the main menu, select **Records**.
2. Select **Service Providers**.
3. Locate your service provider organization in the list or use the search function.
4. On the left-hand menu, select **Related Actions**.
5. Select **Manage Organization Relationships**.
6. Click **Remove a Relationship**.

### Manage Organization Relationships

Please make a selection below to add or remove an organization relationship

**How would you like to manage your organization relationships?**

7. Check the checkbox next to the organization name to remove the relationship.

**NOTE:** If there are users in the consulting firm that are associated with your organization, you will have to remove the users first.

8. Select **Submit**.
9. Confirm by clicking **Yes** on the pop-up window.