

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

Managing Users

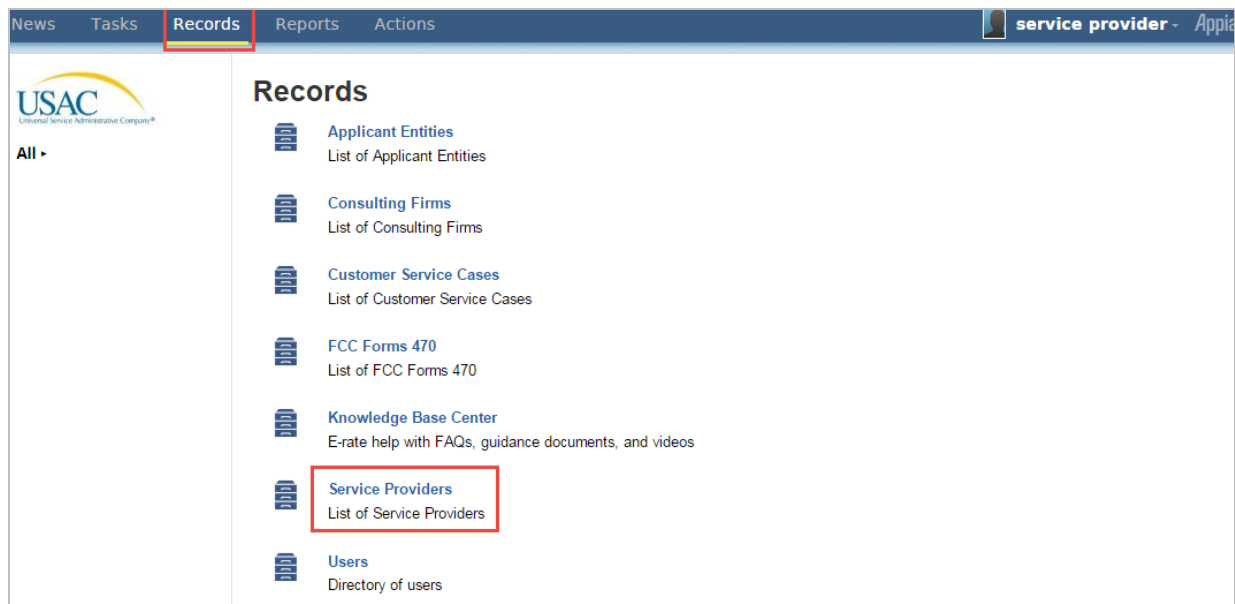
Only account administrator users can manage other users in their organization.

The account administrator has the following capabilities:

- Create a New User
- Add or Remove Existing Users
- Manage Service Provider User Permissions
- Modify Account Administrator
- Create a Customer Service Case
- Manage Organization Relationships

Create a New User

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



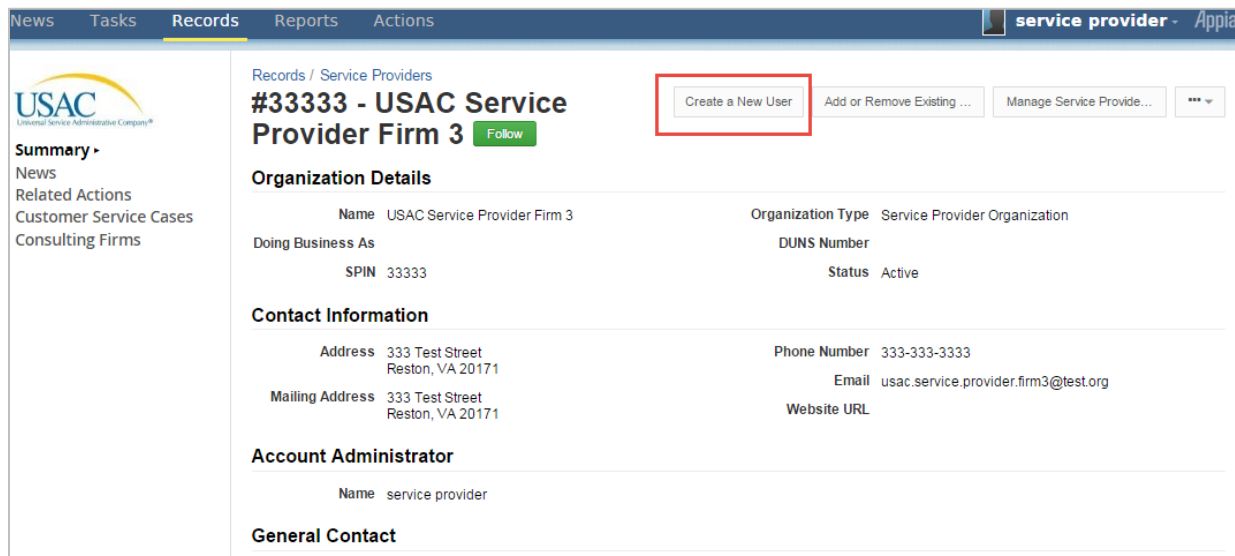
2. Select **Service Providers**.

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3. Locate your service provider organization in the list or use the search function.



4. Select the link to your organization. The organization details open.
5. Click **Create a New User**.



6. Enter the **User Details**:
 - Name
 - Title
 - Phone
 - Email

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- Modify the address if necessary. The address for the user defaults to the address for the organization.

Create A User for USAC Service Provider Firm 3

User Details

User Type
Service Provider

First Name * Job Title *

Last Name * Phone Number *

Middle Initial Phone Extension

Email

Email * Confirm Email *

This email will be used as the username for the new account

Address

Address Line 1 * County

333 Test Street

Address Line 2 Zip Code *

20171

City * Zip Code Extension

Reston

State *

- Select the permissions for the new user:
 - “Full rights” users can certify invoices and forms.
 - “Partial rights” users can create and edit invoices and forms.
 - “View only” users can see invoices and forms for your organization but not create or edit them.
 - To apply the same permissions to all forms, use the **Apply All** drop-down menu. To set the permissions at the individual form level, use the associated drop-down menu.

User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow (for example, to including invoicing) as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.

Apply All	Invoice Permission	473 Permission
<input type="text"/>	<input type="text" value="View Only"/>	<input type="text" value="View Only"/>

- Click **Continue**.
- Review the information on the **Confirm User Details** page.
- To confirm the information, click **Submit**.
- A pop-up window appears. To confirm that you would like to proceed, click **Yes**.

The new user will receive an invitation email to sign in to EPC, create a password, and accept the terms and conditions.

NOTE: The user must accept the terms and conditions before you can modify his or her role. Once the new user accepts the terms and conditions, he or she will have access to the functionality that the role permits.

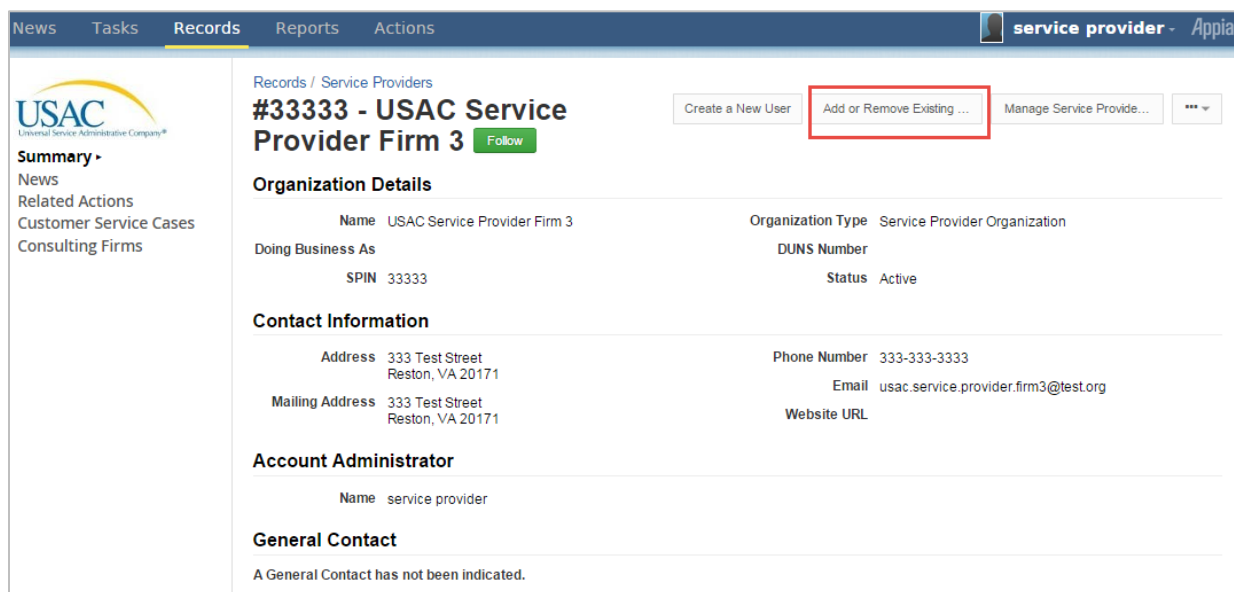
Add or Remove Existing Users

Use the **Add or Remove Existing Users** function to add an existing user to an organization, including adding a consultant.

NOTE: Before you can add a user from a consulting firm to an organization, the consulting firm must be related to the organization. See the service provider user guide named, “Managing your Organization” for information about how to add a consulting firm.

Add a User

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. The organization details open.



The screenshot shows the 'Records / Service Providers' page for organization '#33333 - USAC Service Provider Firm 3'. The 'Add or Remove Existing ...' button is highlighted with a red box. The page displays organization details, contact information, and account administrator information.

Organization Details	
Name	USAC Service Provider Firm 3
Organization Type	Service Provider Organization
Doing Business As	DUNS Number
SPIN 33333	Status Active

Contact Information	
Address	Phone Number
333 Test Street Reston, VA 20171	333-333-3333
Mailing Address	Email
333 Test Street Reston, VA 20171	usac.service.provider.firm3@test.org
	Website URL

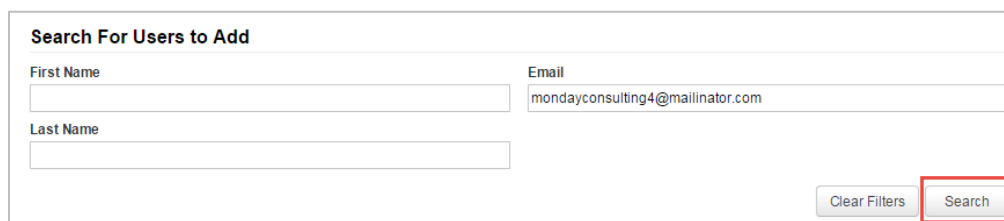
Account Administrator

Name	service provider
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General Contact

A General Contact has not been indicated.

5. Click **Add or Remove Existing Users**.
6. The list of **Existing User Permissions** opens.
7. In the **Search for Users to Add** section, enter the first name, last name, or email of the new user.



The screenshot shows the 'Search For Users to Add' form with the following fields:

- First Name:
- Last Name:
- Email:
- Buttons: Clear Filters, Search (highlighted with a red box)

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8. Click **Search**.
9. Select the user from the list.
10. Click **Submit**.

Search For Users to Add

First Name Email

Last Name

<input checked="" type="checkbox"/>	Name	Email	Primary Organization
<input checked="" type="checkbox"/>	Monday Consulting	mondayconsulting4@mailinator.com	Monday Testing Consulting Firm

11. A pop-up window appears to confirm if you would like to proceed. Click **Yes**.

Remove a Consultant User

To remove a consultant user, select the **X** icon next to the user name on the list of users.



Summary
News
Related Actions -
Customer Service Cases
Consulting Firms

Manage User Organization Associations

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

Existing User Permissions

Name	Email	Invoice Permission	473 Permission	
Test Test	test@testingmore.com	Partial	Full	
service provider	serviceprovider6@mailinator.com	Full	Full	
Service Provider	serviceprovider7@mailinator.com	Full	Full	
Consulting Firm3	consultingfirm3@mailinator.com	View Only	View Only	✕
Service Provider	serviceprovider8@mailinator.com	View Only	View Only	
Monday Consulting	mondayconsulting4@mailinator.com	View Only	View Only	✕

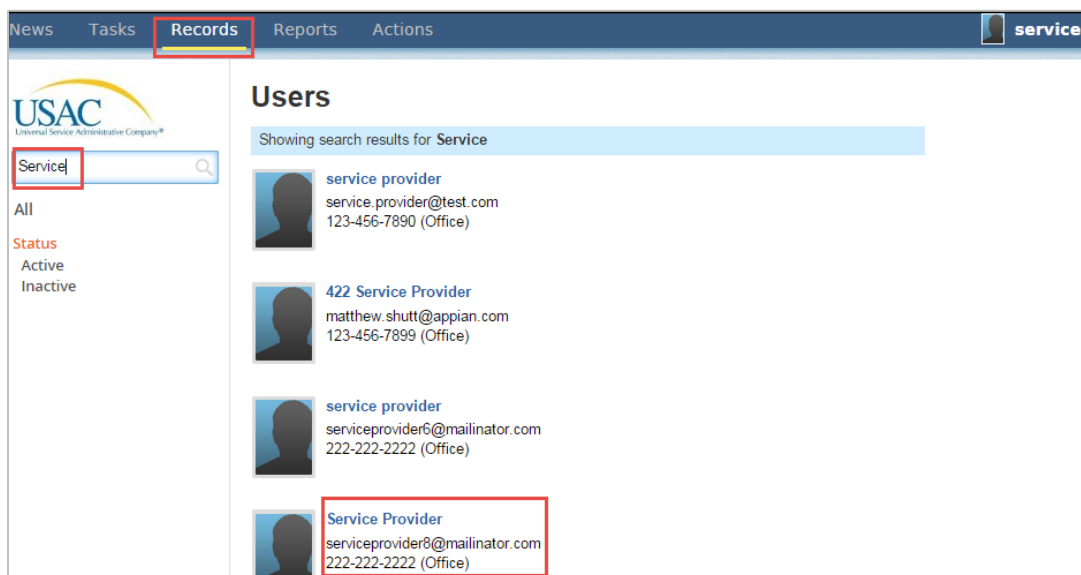
Remove Other Users in Your Organization

You can deactivate other users in your organization.

1. Select **Records** from the main menu.
2. Click on the **Users** link.



3. Locate the user in the list by entering his or her user name.
4. After locating the user, click the user name link.

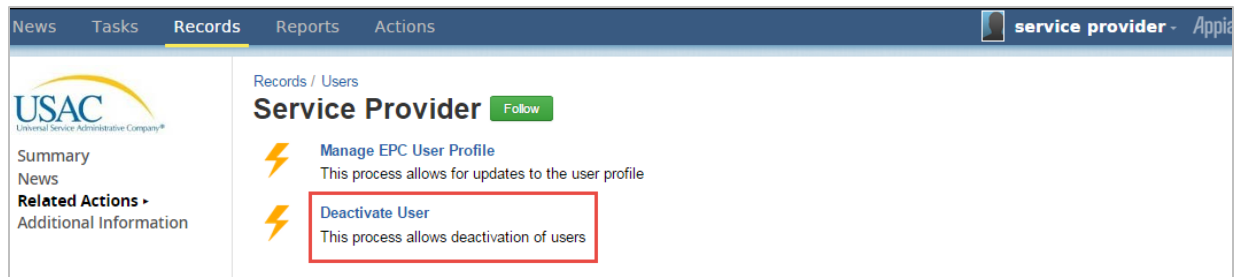


5. The user profile opens. Click **Related Actions**.

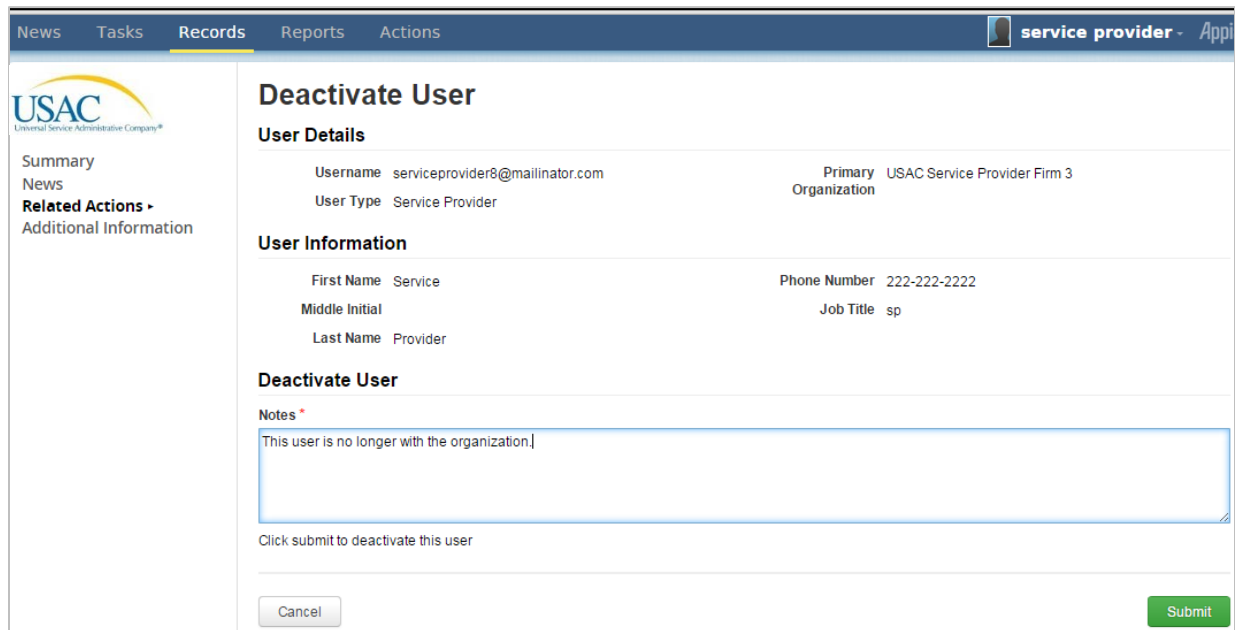


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6. Click **Deactivate User**.



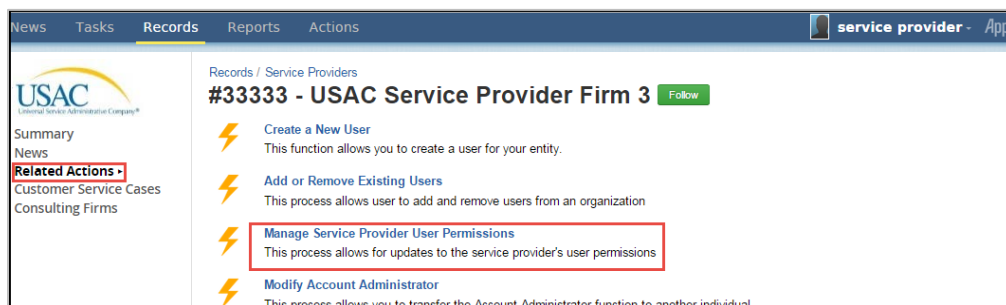
7. Enter a note explaining the reason for deactivating the user.



8. Click **Submit** and confirm this action.

Manage Service Provider User Permissions

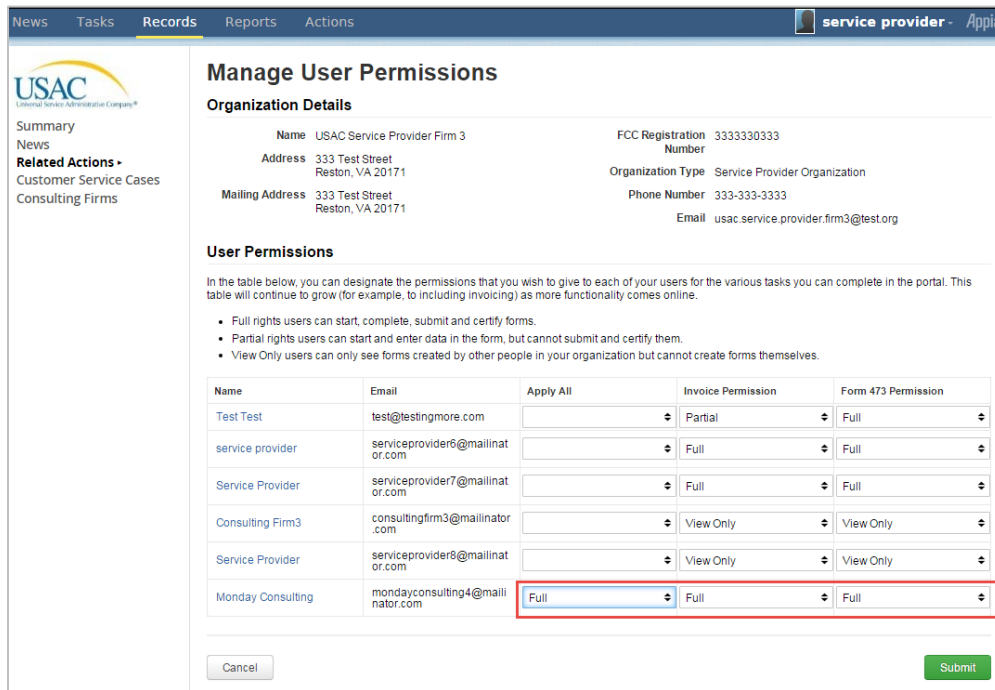
1. On the main menu, select **Records**.
2. Select **Service Providers**.
3. Locate your service provider organization in the list.
4. Select **Related Actions**.
5. Click **Manage Service Provider User Permissions**.



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6. Locate the user's name, then use the drop-down menu to assign the correct permissions.

NOTE: "Full permission" users can certify invoices and forms, "partial permission" users can create and edit, "view only" users cannot create or edit invoices or forms, just view them.



Manage User Permissions

Organization Details

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

User Permissions

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- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.

Name	Email	Apply All	Invoice Permission	Form 473 Permission
Test Test	test@testingmore.com		Partial	Full
service provider	serviceprovider6@mailinator.com		Full	Full
Service Provider	serviceprovider7@mailinator.com		Full	Full
Consulting Firm3	consultingfirm3@mailinator.com		View Only	View Only
Service Provider	serviceprovider8@mailinator.com		View Only	View Only
Monday Consulting	mondayconsulting4@mailinator.com	Full	Full	Full

Buttons: Cancel, Submit

7. Select **Submit**.