

# E-RATE PRODUCTIVITY CENTER (EPC)

## FCC FORM 471 QUICK FILING GUIDE FOR LIBRARY SYSTEMS

### GETTING STARTED

To file E-rate Program forms for FY2016, you must have an account in the E-rate Productivity Center (EPC). EPC is the customer portal where you will complete and file program forms, obtain the status of applications, submit requests, receive timely reminders and notifications, respond to USAC questions about your applications, and ask USAC questions.

Before you can file the FCC Form 471 for FY2016, you must be set up as a user in EPC, created a password, logged in, and accepted the terms and conditions for using EPC.

- If you have received an email from USAC telling you that you can log in to EPC but you have not done so, follow the login process, create a password, and accept the terms and conditions.
- If someone in your organization is already set up as an account administrator, that person can create you as a user. Follow the login process, create a password, and accept the terms and conditions.
- If you have not received an email from USAC or you are not sure where to start, call the Client Service Bureau (CSB) at (888) 203-8100 for their assistance in setting up your account.

A glossary of terms, frequently asked questions (FAQs), user guides, video tutorials, and other useful information is available on the [E-rate Productivity Center page](#) on the USAC website.

### REVIEW & UPDATE PROFILE INFORMATION

Review and update your profile information. Your profile is important because much of this information is imported directly into your FCC Form 471.

- Log in to your account in EPC and go to **My Landing Page** under the **Reports** tab. Then click your library system name under **My Entities**.
- Review the information displayed. To update information for the library system, click **Manage Organization** at the top of the page. Fields with a red asterisk must have an entry.
  - If you do not have an FCC Registration Number, register on the FCC's [CORES website](#).
  - Answer your connectivity questions by clicking **Related Actions** and then **Manage Connectivity Questions**.
  - If you have one or more contracts, enter their information by clicking **Related Actions** and then **Manage Contracts**.
- Review the information for each of your individual libraries and make any necessary corrections by clicking on the library name and then click **Manage Organization**.
  - If one or more non-instructional facilities (NIF) are missing from your list of entities, call CSB for assistance.
  - Be sure the urban/rural status is correct – you can enter or change this status if incorrect.

- Review the main branch and the public school district in which the main branch library is located. There can only be one main branch library.
- Be sure your library square footage information is correct.
- To add an annex, click **Related Actions** and then **Manage Annexes**.

## START YOUR FCC FORM 471

From **My Landing Page**, click **FCC Form 471**. Your library system information is automatically populated from your profile.

- Create a nickname for this form. The nickname should be unique but concise, and it will appear along with your form number anywhere your form is listed.
- Identify the main contact person for questions about this form. This can be you or any other user in your organization.
- Choose the category of service for this form – Category One or Category Two.
  - You cannot change your selection after you leave this page.
- Review your entity and discount information.
  - Information on your individual libraries and their associated discount information will be automatically populated from their profiles. If any information is correct, you must return to their profiles in your organization account to correct it.

## ADD A FUNDING REQUEST.

For each funding request you add, this is a two-step process –you create an FRN (funding request number), then you create one or more FRN line items to provide the details.

- First, click the green **Add FRN** button.
  - If you choose **Contract**, you can choose the appropriate contract from the information you already entered in your profile.
  - If you choose **Tariff** or **Month-to-Month**, provide the details requested on your service.
  - You will then return to the **Funding Requests** page.
- Second, click the box to the left of your funding request and click the **Manage FRN Line Items** button, and enter the information requested.
  - Note that the definitions of some of the individual fields have changed from last year. For example, the entry in the first field for recurring costs (left-hand side) is the TOTAL (eligible + ineligible) cost of the recurring service, and the entry in the first field for one-time costs (right-hand side) is the TOTAL (eligible + ineligible) cost of the one-time service. Also, check the final **Pre-discount Total Eligible Costs** figure to make sure it is close to your estimate for the total eligible costs for that line item.
  - For Category One services, you will be asked to allocate the number of “units” (connections, such as telephone lines or circuits or Internet lines or circuits) among the individual libraries receiving service. This is the number you entered in the **Monthly Quantity** field in the **Cost Calculation** section for this FRN line item.
  - For Category Two services, you will be asked to allocate the total costs for this FRN line item among the entity or entities receiving service.
- Third, review the connectivity questions.
  - The information you provided in the profiles for your individual libraries will be automatically populated into the form. If any information is incorrect, you must return to the profiles in your organization account to correct it.

## REVIEW YOUR COMPLETED FORM.

- If you are ready to review your form, click the **Yes** button at the bottom of the connectivity questions.
- The system will generate a task for all full- and partial-rights users when a PDF of the form is available and notify them by email.
- Review the PDF. If you need to make changes, click **Edit Form**.
  - To make changes to the form, return to the **Tasks** tab and click on the task.
  - You can also find the task on **My Landing Page**.
- If you are a partial-rights user, approving the PDF will notify the full-rights users in your organization that the form is available for certification. If you are a full-rights user, you can certify the form yourself or allow another full-rights user to pick up the task.

## CERTIFY THE FORM.

- After you have reviewed the PDF and made any necessary changes, click the **Ready for Certification** button.
- Enter the amount set aside in your budget for necessary resources (e.g., computers, training, software, electrical capacity – not eligible for E-rate Program support but necessary to use the E-rate Program discounted services effectively).
- You must check every certification before you can certify the form.

## NEXT STEPS.

- You can view and print your form using the link to your form from the bottom of your Receipt Acknowledgment Letter (RAL) located under your **News** tab. Click **Generated Documents** to view and print a PDF version of your form.
- If you need to make RAL corrections, go to your form and click **Related Actions** to see a list of allowable corrections.