Universal Service Administrative Co.

E-rate Program Applicant Training

EPC Fundamentals

September – November 2016

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Overview

- What is EPC?
- What do I need to begin using EPC?
- How do I log in for the first time?
- How do I navigate to and complete the actions I want to take?
- Where can I go for help?

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What is EPC?

- EPC is the E-rate Productivity Center – the main point of contact for applicants with the E-rate Program
  - Complete and certify program forms including FCC Forms 498, 470, 471 and 486
  - Obtain the status of applications and requests
  - Submit appeals and post-commitment change requests (e.g., SPIN changes and service substitutions COMING SOON)
  - Receive timely reminders and notifications
  - Respond to PIA questions
  - Ask USAC questions

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What do I need to begin using EPC?

- Organization account
  - Independent school
  - Independent library
  - School district
  - Library system
  - Consortium

  NOTE: There are also accounts for service providers and for consultants.
- Account administrator

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What do I need to begin using EPC?

- Organization account
  - Your organization account contains information about your organization and any related organizations.
  - The information for each organization is located in its profile.
    - Profiles for individual schools are managed through the school district profile.
    - Profiles for library branches are managed through the library system profile.
    - Consortium members manage their own profiles, and the members are listed in the consortium profile.

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What do I need to begin using EPC?

- Account administrator
  - The account administrator can:
    - Create other users on the organization account.
    - Assign user rights (permissions) to those users.
      - Full rights – view, complete, and certify program forms, update profile information.
      - Partial rights – view and complete program forms, update profile information.
      - View-only rights – view program forms and profile information.
    - Update his or her own rights.

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Logging In

How do I log in for the first time?

- First, USAC sets up accounts for the following (if they do not already exist):
  - The organization.
  - The individual schools or library branches that belong to the organization, if any.
  - The account administrator.
- The account administrator must go to **portal.usac.org**, create a password, log in to EPC, and accept the terms and conditions of EPC use before he or she can take any actions.
- Account users created by the account administrator must go through the same process (create, log in, accept).

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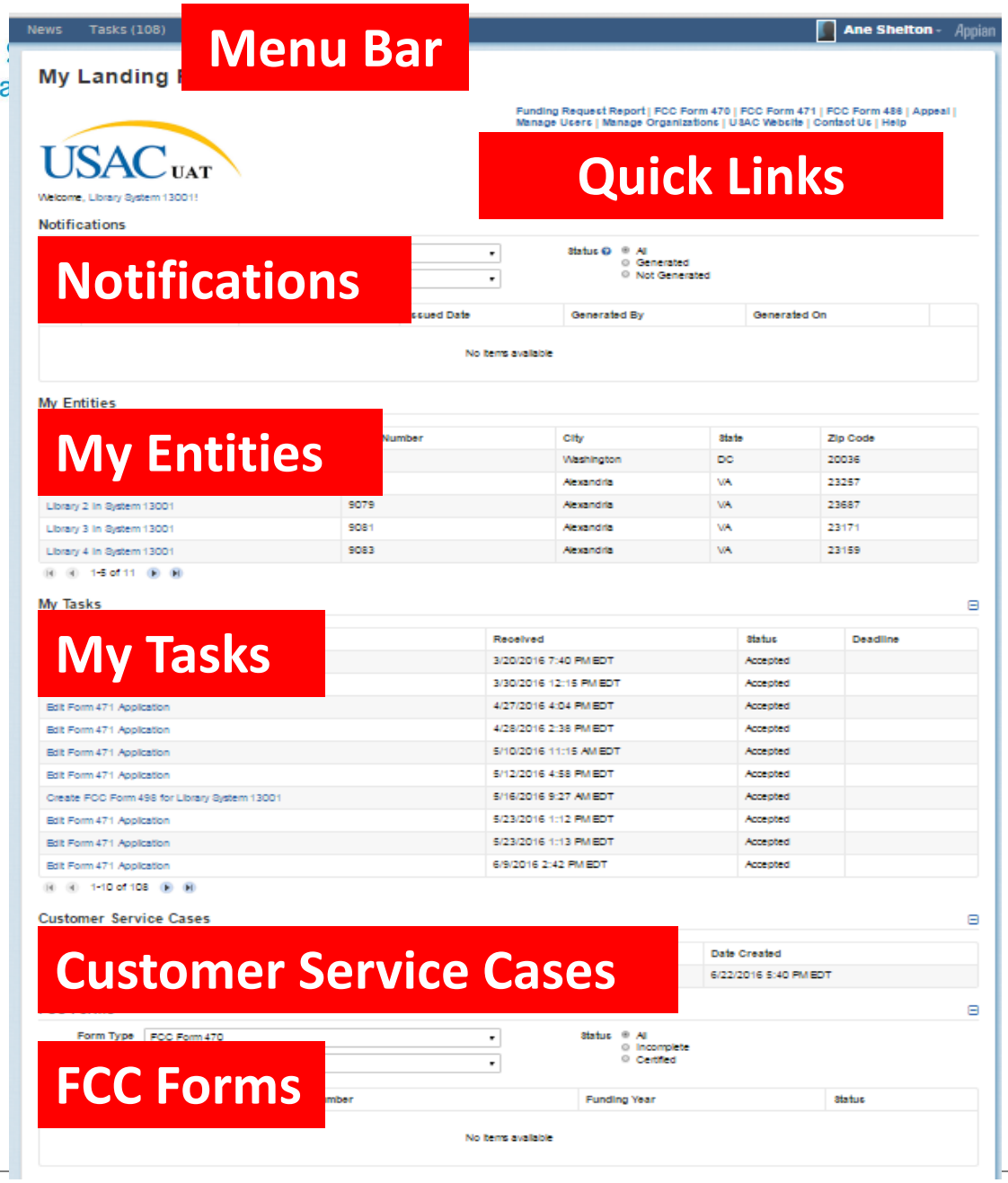

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My Landing Page - Navigation

Menu Bar

- The News tab contains your “letters,” other notifications from USAC (e.g. FCDL), and information on program activities – for example, if someone certifies a form.
- The Tasks tab includes actions for someone in your organization to do, such as respond to PIA requests.
- The Records tab features lists of related groups, such as applicants, service providers, and program forms.

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Navigation

Menu Bar (continued)

- At this point, the Reports tab is limited to landing pages and RAL modification requests, but other reports can be added later.
- Actions include things you can do, such as submitting a customer service request or exporting FCC Form 470 or 471 data.

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Navigation

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

Quick Links

- Quick links to actions you can take
  - File a program form (FCC Forms 470, 471, 486)
  - Manage users (edit, create, change permissions)
  - Manage organizations (edit information)
  - Contact us (open a customer service case)

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Notes on filing program forms

- FCC Forms 470, 471, 486 can be filed from:
  - The links below the menu bar – OR –
  - The parent organization's main page (click "Related Actions" and then the appropriate form, or click "FCC Forms" and then the appropriate button at the top of the page)
- FCC Form 498 can be filed from the parent organization's main page by clicking "Related Actions."
  - Only the school or library official or general financial contact will be able to see the FCC Form 498 link.

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Notes on filing program forms

- FCC Form 472 (BEAR) must be filed in the legacy system (from the Forms page on the USAC website).
- FCC Form 500 must be filed on paper for now.

Other program forms:

- FCC Form 474 (SPI), a service provider form, must be filed in the legacy system.
- FCC Form 473 (SPAC), a service provider form, must be filed in the E-File System.

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Navigation

Notifications

- From this section, you can search for, generate, and view notifications such as a Funding Commitment Decision Letter or FCC Form 486 Notification Letter.

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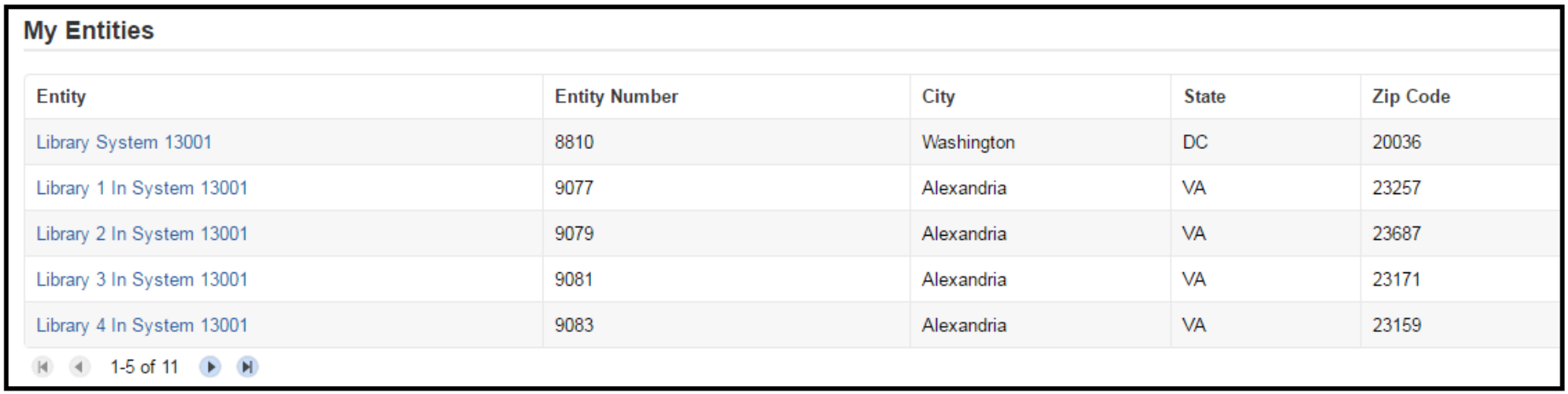
Navigation



My Entities

Entity	Entity Number	City	State	Zip Code
Library System 13001	8810	Washington	DC	20036
Library 1 In System 13001	9077	Alexandria	VA	23257
Library 2 In System 13001	9079	Alexandria	VA	23687
Library 3 In System 13001	9081	Alexandria	VA	23171
Library 4 In System 13001	9083	Alexandria	VA	23159

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My Entities

- From this section, you can access and edit profile information for each of your entities (individual schools, library branches, non-instructional facilities, annexes).

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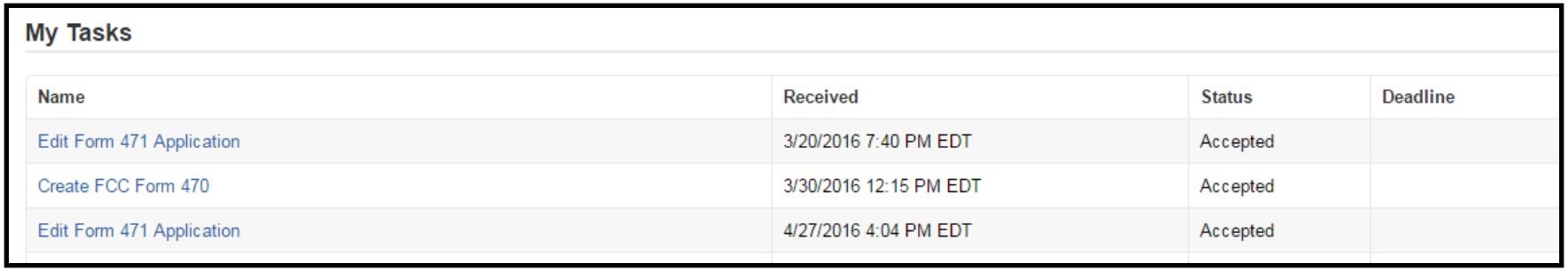
Navigation


My Tasks

Name	Received	Status	Deadline
Edit Form 471 Application	3/20/2016 7:40 PM EDT	Accepted	
Create FCC Form 470	3/30/2016 12:15 PM EDT	Accepted	
Edit Form 471 Application	4/27/2016 4:04 PM EDT	Accepted	

My Tasks

- From this section, you can access tasks that need to be completed, such as certifying a form.
- If you start but do not certify a form, the system will create a task for you to return to and finish your work from where you left off.

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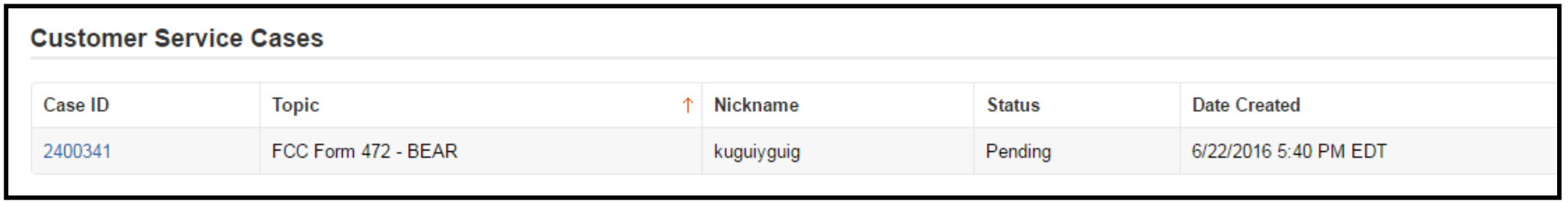
Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
2400341	FCC Form 472 - BEAR	kuguiyguig	Pending	6/22/2016 5:40 PM EDT

Customer Service Cases

- EPC users can file customer service cases, which are requests sent to the Client Service Bureau (our call center).
  - To create a case, go to the Actions tab in the Menu Bar and choose “Contact Us.”
  - You can ask a question, provide information, or make certain requests.

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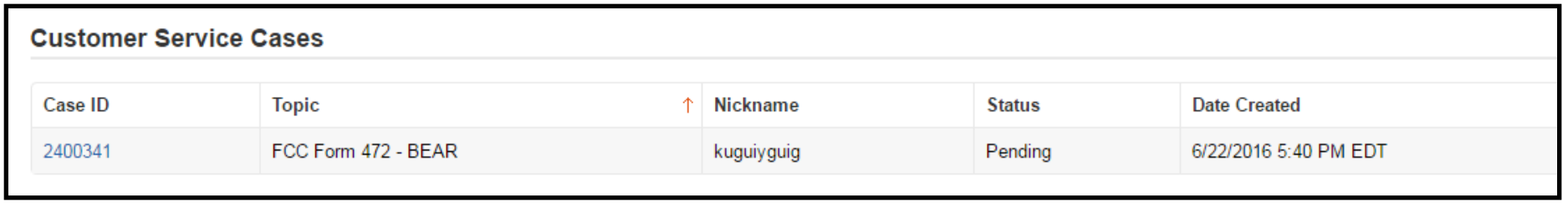
Navigation



Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
2400341	FCC Form 472 - BEAR	kuguiyguig	Pending	6/22/2016 5:40 PM EDT

Customer Service Cases

- From this section, you can view a customer service case that you have already submitted, track USAC actions on the case, attach documentation, and/or ask follow-up questions.
- More interactivity is possible than with the Submit a Question function.

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Navigation

FCC Forms

- From this section, you can search for and view program forms started and/or certified by your organization.

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Additional Actions

How to submit RNL modifications

- USAC issues a Receipt Notification Letter (RNL) in the News feed immediately after an FCC Form 470 is certified.
- Applicants can submit modifications to the form, including adding an RFP document.
- Navigate to the specific form and select the application.
- Under “Related Actions,” choose the specific modification you want to make.
- Complete and submit the information requested.

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Additional Actions

How to submit RAL modifications

- USAC issues a Receipt Acknowledgment Letter (RAL) in the News feed immediately after an FCC Form 471 is certified.
- Applicants can submit modifications (Submit Modifications).
  - Navigate to the specific form and select it.
  - Under “Related Actions,” choose “Submit Modification Request (RAL).” You can submit one or multiple modifications by navigating to the appropriate section(s) of the request.

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Additional Actions

How to respond to PIA questions

- During USAC's review of an FCC Form 471, USAC may have questions for the applicant.
- USAC notifies the applicant of the questions through email to the contact person and an item in the News feed.
- The person who will answer the questions goes to Records and enters the application number to access the questions.
- All questions must be answered before the response can be submitted.

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Additional Actions

How to submit appeals

- Applicants can appeal a USAC decision.
  - Click “Appeal” in the list of options just under the menu bar on the landing page. -OR-
  - Under the organization’s profile page, click “Related Actions” from the left-hand menu and “Create Appeal” from the list of options.
  - Identify the FRN(s) and provide the information requested.
  - Receipt confirmation sent (COMING SOON)

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Getting Assistance

Where to go for help

- Call the Client Service Bureau at (888) 203-8100 for help with the following:
  - Verifying accounts and account administrators
  - Updating profile information
  - Creating new users and updating existing users
  - Linking organizations
  - General questions about the portal

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Getting Assistance

Where to go for help

- Visit the USAC website for the following:
  - Glossary of terms
  - Frequently asked questions
  - Applicant user guides
  - Video tutorials
  - Copy of the portal terms and conditions

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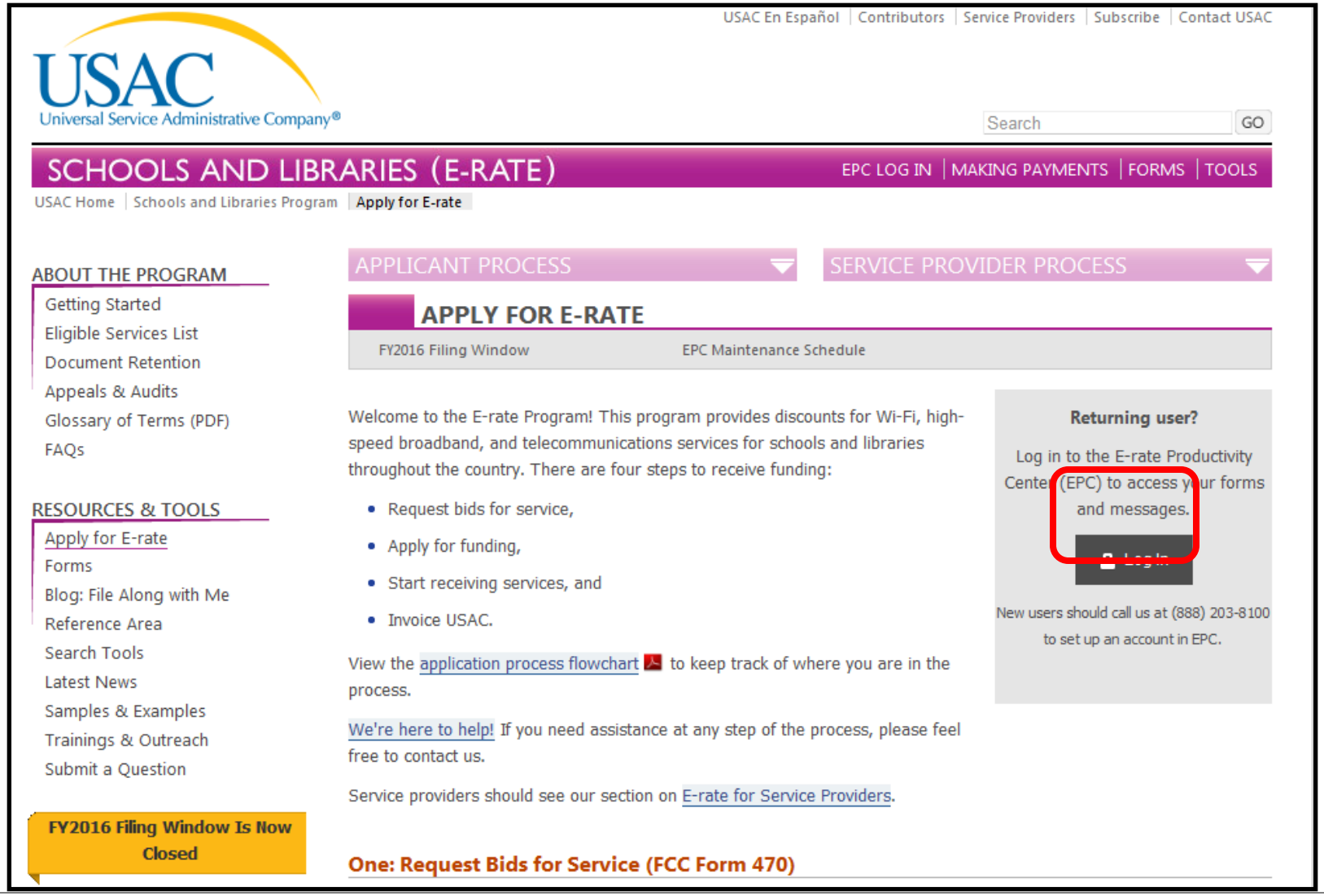
Apply for E-rate page



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Questions?

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