

E-rate Program Applicant Training

EPC Fundamentals

September – November 2016



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?



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



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



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.



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.



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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	Library 3 in System 13001	9081		Alexandria	VA.	23171
	Library 4 in System 13001	9083		Alexandria	VA.	23159
			Receive	ed	Status	Deadline
			3/20/20	16 7:40 PM EDT	Accepted	
			3/30/20	16 12:15 PM EDT	Accepted	
	Bdt Form 471 Application		4/27/20	16 4:04 PM EDT	Accepted	
	Edit Form 471 Application		5/10/20	16 11-15 AM EDT	Accepted	
	Bit Form 471 Application		5/12/20	16 4:58 PM EDT	Accepted	
	Create FCC Form 498 for Library System 13001		5/16/20	16 9:27 AM EDT	Accepted	
	Edit Form 471 Application		5/23/20	16 1:12 PM EDT	Accepted	
	Bdit Form 471 Application		5/23/20	16 1:13 PM EDT	Accepted	
	Edit Form 471 Application		6/9/201	6 2:42 PM EDT	Accepted	
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	Customer Service Cases					
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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.



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.



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)



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.



Navigation

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 <u>E-File System</u>.



Navigation

Notificat	tions					
Notificatio	on Type	FCDL		¥	Status 😧 🔍 All	
Fundi	ing Year	2016		•	 Generated Not Generated 	
Wave	Number	Please select a valu	e	T		
N	Notificatio	n	Description	Issued Date	Generated By	Generated On

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.



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).



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.



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.



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 <u>Submit a</u> <u>Question</u> function.



Navigation

FCC Forms						
Form Type	FCC Form 470		• Status • All • • Incomplete • • Certified Funding Year Status			
Funding Year	Form Type FCC Form 470 Funding Year Select a Funding Year Nickname Application Number	T		Certified		
Nickname		Application Number		Fundin	ng Year	Status

FCC Forms

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



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.



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.



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.



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)



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



Where to go for help

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



Universal Service Administrative Company ⁴	9			Search	GO
SCHOOLS AND LIBR	ARIES (E-RATE) Apply for E-rate		EPC LOG IN MAR	KING PAYMENTS FORMS T	OOLS
ABOUT THE PROGRAM	APPLICANT PROCESS	▼	SERVICE PROVI	IDER PROCESS	-
Getting Started	APPLY FOR E-RAT	E			
Eligible Services List Document Retention	FY2016 Filing Window	EPC Maintenance S	ichedule		
Glossary of Terms (PDF) FAQs	Welcome to the E-rate Program! This program provides discounts for Wi-Fi, high- speed broadband, and telecommunications services for schools and libraries throughout the country. There are four steps to receive funding:			Returning user? Log in to the E-rate Produc Center (EPC) to access your	ctivity forms
RESOURCES & TOOLS	 Request bids for service, 			and messages.	101110
Apply for E-rate Forms	Apply for funding,				
Blog: File Along with Me	 Start receiving services, and 				
Reference Area	 Invoice USAC. 			New users should call us at (888) 2	203-810
Search Tools Latest News	View the application process flowchar process.	t 😕 to keep track of w	here you are in the	to set up an account in LPC	
Samples & Examples Trainings & Outreach Submit a Question	We're here to help! If you need assist free to contact us.	ance at any step of the	process, please feel		
Submit a Question	Service providers should see our sect	ion on E-rate for Servic	e Providers.		
FY2016 Filing Window Is Now					





Questions?