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
Getting Started

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.
Getting Started

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).
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.
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.
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.
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.
• 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

- 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

- 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.
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

• 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.
FCC Forms

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

- Request bids for service,
- Apply for funding,
- Start receiving services, and
- Invoice USAC.

View the [application process flowchart](#) to keep track of where you are in the process.

We're here to help! If you need assistance at any step of the process, please feel free to contact us.

Service providers should see our section on [E-rate for Service Providers](#).

**One: Request Bids for Service (FCC Form 470)**
Questions?