



EPC FUNDAMENTALS

E-RATE PROGRAM TRIBAL APPLICANT TRAINING

2016



Universal Service
Administrative Co.

OVERVIEW

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?

GETTING STARTED

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

GETTING STARTED

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.

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).

News Tasks (108) **Ane Shelton - Applian**

Menu Bar

My Landing **Quick Links**

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 488 | Appeal | Manage Users | Manage Organizations | UAC Website | Contact Us | Help

USAC UAT
Welcome, Library System 13001

Notifications

Notifications

Issued Date Generated By Generated On

No items available

My Entities

My Entities

Number	City	State	Zip Code
	Washington	DC	20036
	Alexandria	VA	23287
	Alexandria	VA	23687
	Alexandria	VA	23171
	Alexandria	VA	23199

Library 2 in System 13001 9079
Library 3 in System 13001 9081
Library 4 in System 13001 9083

1-8 of 11

My Tasks

My Tasks

Received	Status	Deadline
3/20/2016 7:40 PM EDT	Accepted	
3/20/2016 12:15 PM EDT	Accepted	
4/27/2016 4:04 PM EDT	Accepted	
4/28/2016 2:38 PM EDT	Accepted	
5/10/2016 11:15 AM EDT	Accepted	
5/12/2016 4:58 PM EDT	Accepted	
Create FCC Form 488 for Library System 13001	Accepted	
5/16/2016 9:27 AM EDT	Accepted	
5/23/2016 1:12 PM EDT	Accepted	
5/23/2016 1:13 PM EDT	Accepted	
5/23/2016 1:13 PM EDT	Accepted	
6/9/2016 2:42 PM EDT	Accepted	

Btt Form 471 Application
Btt Form 471 Application

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Customer Service Cases

Customer Service Cases

Date Created
6/22/2016 5:40 PM EDT

FCC Forms

FCC Forms

Form Type | FCC Form 470
Number Funding Year Status

No items available

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.

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)

NAVIGATION

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 [E-File System](#).

NAVIGATION

Notifications

Notification Type

Funding Year

Wave Number

Status  All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
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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.

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).

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.

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

- 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.

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.

NAVIGATION

FCC Forms

Form Type ▼

Funding Year ▼

Status All
 Incomplete
 Certified

Nickname	Application Number	Funding Year	Status
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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.

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.

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

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

APPLY FOR E-RATE PAGE

USAC En Español | Contributors | Service Providers | Subscribe | Contact USAC

USAC
Universal Service Administrative Company®

Search

SCHOOLS AND LIBRARIES (E-RATE) [EPC LOG IN](#) | [MAKING PAYMENTS](#) | [FORMS](#) | [TOOLS](#)

[USAC Home](#) | [Schools and Libraries Program](#) | [Apply for E-rate](#)

ABOUT THE PROGRAM

- [Getting Started](#)
- [Eligible Services List](#)
- [Document Retention](#)
- [Appeals & Audits](#)
- [Glossary of Terms \(PDF\)](#)
- [FAQs](#)

RESOURCES & TOOLS

- [Apply for E-rate](#)
- [Forms](#)
- [Blog: File Along with Me](#)
- [Reference Area](#)
- [Search Tools](#)
- [Latest News](#)
- [Samples & Examples](#)
- [Trainings & Outreach](#)
- [Submit a Question](#)

APPLICANT PROCESS ▼

SERVICE PROVIDER PROCESS ▼

APPLY FOR E-RATE

[FY2016 Filing Window](#) [EPC Maintenance Schedule](#)

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](#).

Returning user?

Log in to the E-rate Productivity Center (EPC) to access your forms and messages.

New users should call us at (888) 203-8100 to set up an account in EPC.

FY2016 Filing Window Is Now Closed

One: Request Bids for Service (FCC Form 470)



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QUESTIONS?

EPC FUNDAMENTALS



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THANK YOU!
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BREAK

NEXT PRESENTATION: EPC HANDS-ON WORKSHOP

usac.org/sl • TribalTraining@usac.org • (888) 203-8100