Preparing for Funding Year (FY) 2020

E-rate Program Participant Webinar

December 11, 2019
HOUSEKEEPING – WEBINAR PANEL

• The webinar panel is located on the right-hand side of the screen.
• Open the panel by clicking the orange arrow.

• Use the white arrows to open the sections in the panel.
HOUSEKEEPING – WEBINAR PANEL

- You can use the panel to view the presentation in full screen or window mode.

- We are not using the hand raise function.
HOUSEKEEPING - AUDIO

• Use the “Audio” section of your control panel to select an audio source.
• Choose one of the audio options:
  • Your computer's audio
  • Call in using an access code and audio PIN.
• The audience will remain on mute.
HOUSEKEEPING – TECHNICAL ISSUES

• Use the “Sound Check” link and click question mark icon for audio help.

• Exit webinar, and click the "check system requirements" link in the event confirmation email to determine whether your computer meets the requirements to see and hear the webinar.

• If issues persist, call 877-582-7011 to troubleshoot with GoToWebinar.
HOUSEKEEPING - RESOURCES

• **Slide deck and other resources** are available when you click the arrow to expand the “Handouts” tab.

• This recording will be available after the event via the registration link.
HOUSEKEEPING – Q&A

• There will be a live Q&A session at the end of the presentation.

• Tips for submitting questions:
  • Use the “Questions” box in your webinar control panel anytime during the presentation.
  • Click the box with the arrow above the questions box to expand it and see all written answers.
  • Write in full sentences.
  • Ask one question at a time.
  • Ask questions related to webinar content.
Create a customer service case in EPC:

1. Log in to EPC.
2. Select the Contact Us link from the upper right menu on your landing page.
MEET OUR WEBINAR STAFF

Nkeshi Free
Moderator
Communications Specialist

John Noran
Presenter
Senior Manager
AGENDA

1. EPC Administrative Window
2. EPC User Roles and Permissions
3. Important Reminders
4. Q&A
E-rate Productivity Center (EPC) Administrative Window
Timeline for Updates

• The EPC administrative window to update profiles is now open.
  • Libraries and consortia depend on student counts to accurately calculate their discounts.
  • Counts will not change during the application filing window.
• As in the past, the EPC administrative window will close – and the applicant profiles will be locked – shortly before the Funding Year (FY) 2020 application filing window opens.
All Entities - Update Your Organization’s Profile

- **FCC Registration Number**
  - Verify that the FCC Registration Number (FCC RN) for your billed entity is correct.
  - If you are a school district or library system, you do not need FCC RNs for each of your individual schools or library branches.

- **Contact information**
  - Verify the name, physical address, mailing address, and other contact information for the billed entity and its child entities (individual schools in a school district or library branches in a library system).

- **New entities**
  - For each new entity that is currently missing in your organization's profile, USAC must create the entity for you.
Schools - Update Your Organization’s Profile

- **Independent school/school district student counts**
  - Update the student counts for each of your schools.
  - Use the most recent student information available.
  - Be sure to review your entries for the "peak part-time student counts" for each school. This is the greatest number of part-time students at a single point during the school day, NOT the total number of part-time students that attend the school during the course of the entire school day.

- For each new school entity that is currently missing in your organization's profile, USAC must create the entity for you.
Libraries - Update Your Organization’s Profile

- Independent library/library system square footage and main branch
  - Verify the square footage for each of your libraries and the designation of your library's main branch.
  - If you are an independent library, choose your library as your main branch.
- For each new library entity that is currently missing in your organization's profile, USAC must create the entity for you.
EPC User Roles and Permissions
Roles

- **Account Administrator**
  - Create new users
  - Modify the rights of existing users
  - Modify information about their organization
  - Link or unlink their organization to consulting firms and consortia
  - Modify the Account Administrator

- **User**
  - View, create, certify, and submit FCC forms depending on user permissions
This video will demonstrate how to create a new user.
This video will demonstrate how to modify your Account Administrator.
Manage User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

<table>
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<tr>
<th>Name</th>
<th>Email</th>
<th>Apply All</th>
<th>470 Permission</th>
<th>471 Permission</th>
<th>498 Permission</th>
<th>Post-Commitment Permission</th>
<th>486 Permission</th>
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<td>Full</td>
<td>Full</td>
<td>School or Library Official</td>
<td>Full</td>
<td>Full</td>
</tr>
</tbody>
</table>
User Permissions

- **Full-rights users** can create, certify, and submit FCC forms and requests.
- **Partial-rights users** can create and edit forms and requests but cannot certify or submit them.
- **View-only users** can see forms and requests created by other users in the organization. They cannot create, edit, certify, or submit them.

**NOTE:** All users can create customer service cases in EPC.
Other User Permissions

- **FCC Form 498 School or Library Official**
  - Full-rights user: create, edit, certify, and deactivate FCC Form 498

- **FCC Form 498 General Financial Contact**
  - Partial-rights user: create, edit, and deactivate FCC Form 498
  - Not able to certify the form - Upon the completion of data entry, an EPC task will be automatically routed to the FCC Form 498 School or Library Official in your organization to await certification.

- **Post-Commitment (SPIN Change and Service Substitution requests)**
  - Full-rights user: create, edit, and certify requests
  - Partial-rights user: create and edit requests
  - View-only rights: view submitted requests
This video will demonstrate how to manage user permissions in EPC.
Assistance

Call CSB at (888) 203-8100 if:

• You want to request a user account.
• You do not know who your Account Administrator is.
• The Account Administrator no longer works for your organization.
• You need to add/remove an entity.
• You have questions or technical issues.
Important Reminders
Applicant Reminders

• Update your entity profile in EPC.
  • Entity information
  • User permissions

• Check the [Category One (C1) services drop-down menu table](#) to determine if a request for proposal (RFP) is required.

• All potential bidders must have access to your [FCC Form 470](#), RFP and RFP documents.

• Determine what [invoicing method](#) you prefer and discuss this with your service provider at the time you file your FCC Form 471.
Applicants - Add Contracts to Your Profile

From your entity profile page:

- Click **Contracts**.
- All contracts that were completed in EPC will populate.
  - To enter a contract into EPC select **Manage Contracts**.
Service Provider Reminders

• Make sure your FCC Form 498 information is current.

• Provide responsive bids to the applicant’s FCC Form 470 and RFP.

• Have a discussion with the applicant to determine what invoicing method they prefer.

• File your FCC Form 473 (SPAC) to certify compliance with program rules.

• File for each funding year and for each Service Provider Identification Number (SPIN)/498 ID
FCC Form 498 Assistance

Applicants and Service Providers:

- Call USAC at (888) 641-8722
- Select **Option 4: Contributors**
BEFORE YOU BEGIN:

**APPLICANTS:** Applicants must first have an entity number and an E-rate Productivity Center (EPC) account.

**SERVICE PROVIDERS:** Service providers must first obtain a Service Provider Identification Number (SPIN) (service provider 498 ID) by submitting FCC Form 498.
Forms and requests for **FY2016 and forward**:  
- FCC Form 470, FCC Form 471, FCC Form 486, FCC Form 500  
- FCC Form 498 (applicants)  
- Services substitutions, SPIN changes, appeals  
- Invoice deadline extension requests
File in Legacy Systems

Applicants

• FCC Form 472 (BEAR)

• FCC Form 486 - *FY2015 and previous years*

• Invoice deadline extensions - *FY2015 and previous years*

Service Providers

• FCC Form 473 (SPAC), FCC Form 474 (SPI), and FCC Form 498 in the E-File System

• Invoice deadline extensions - *FY2015 and previous years*
HOUSEKEEPING – Q&A

- Use the “Questions” box in your webinar control panel to submit your question in writing.
  - Click the box with the arrow above the questions box to expand it.
  - Ask questions related to webinar content.
Q&A SESSION

SUBMIT YOUR QUESTIONS DURING THE LIVE WEBINAR
Create a customer service case in the E-rate Productivity Center (EPC).

1. Log in to EPC.
2. Select the Contact Us link from the upper right menu on your landing page.
Winter Webinar Schedule Coming Soon!

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WEBINAR SURVEY

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THANK YOU!