Preparing for Funding Year (FY) 2020

E-rate Program Participant Webinar

December 11, 2019

Universal Service
Administrative Co.

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.

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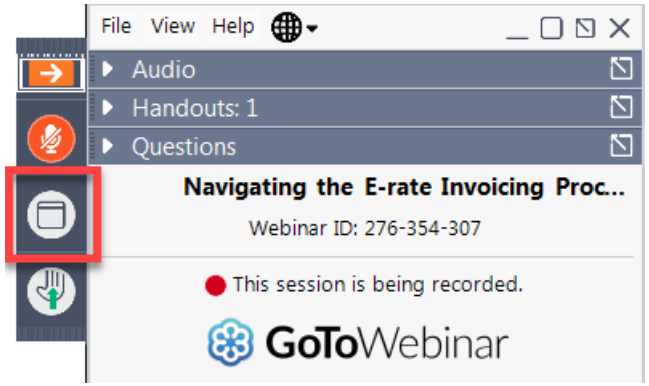
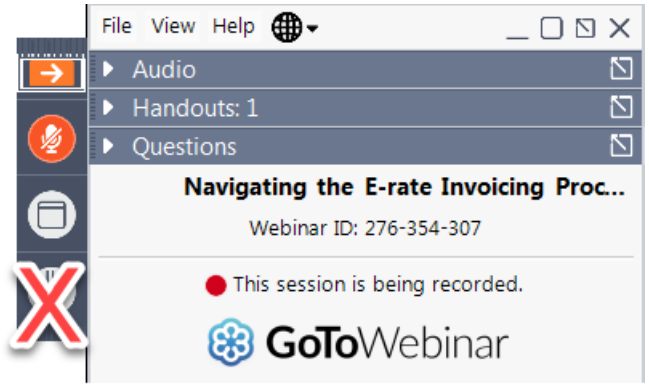
HOUSEKEEPING – WEBINAR PANEL

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



- We are not using the hand raise function.



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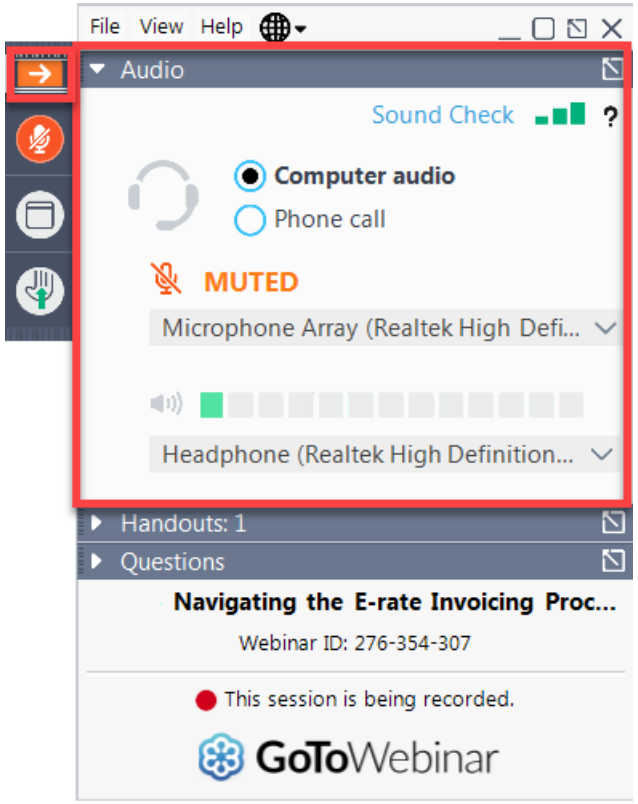
HOUSEKEEPING - AUDIO

- 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.



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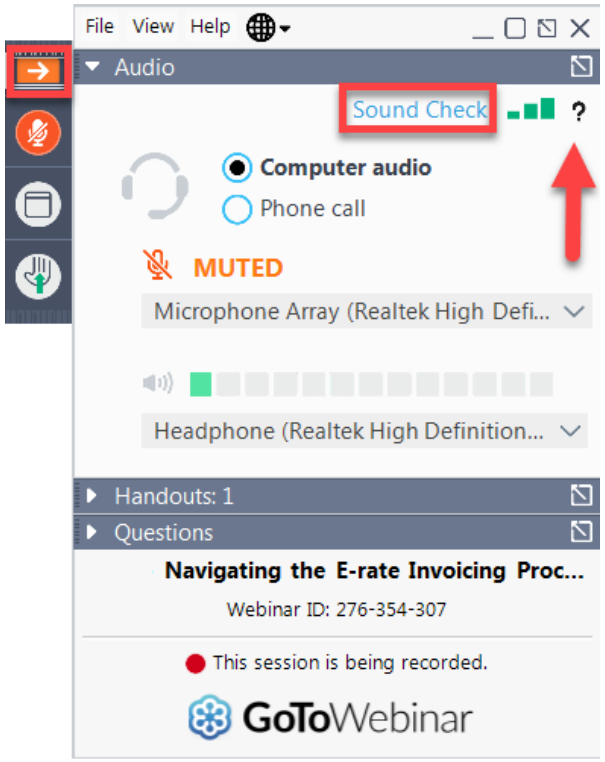
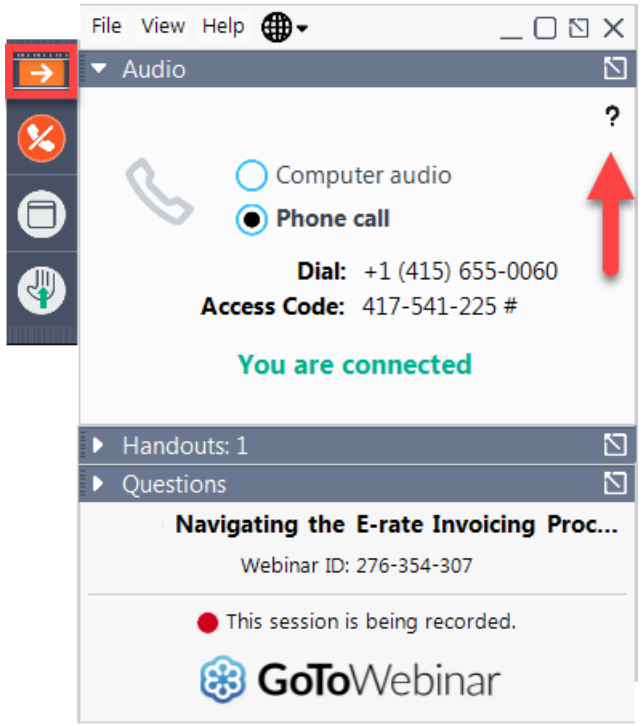
- Use the “Sound Check” link and click question mark icon for audio help.
- Exit webinar, and click the "check system requirements" link in the event confirmation email to determine whether your computer meets the requirements to see and hear the webinar.
- If issues persist, call 877-582-7011 to troubleshoot with GoToWebinar.



Computer Audio



Phone Call

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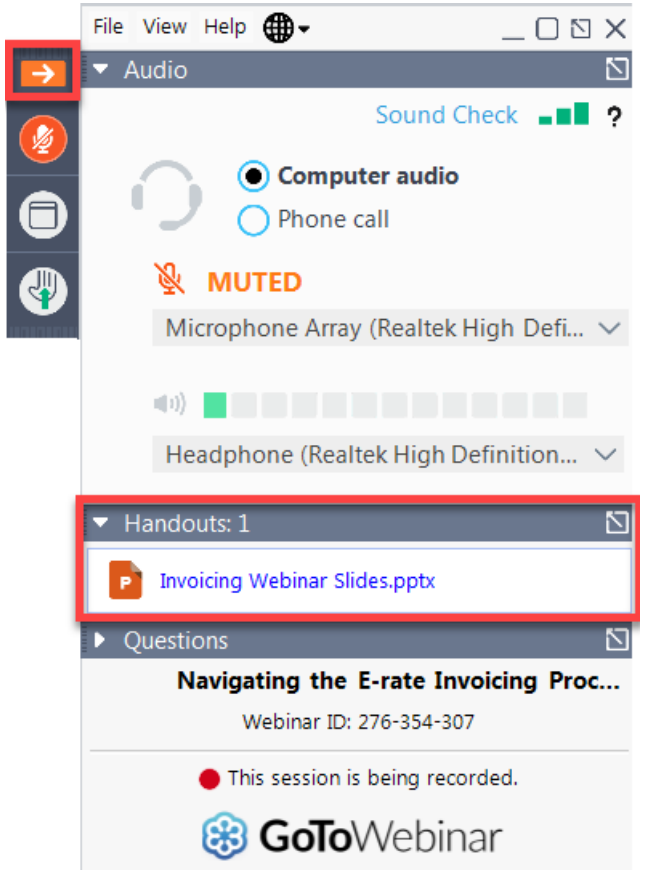
HOUSEKEEPING - RESOURCES

- **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.



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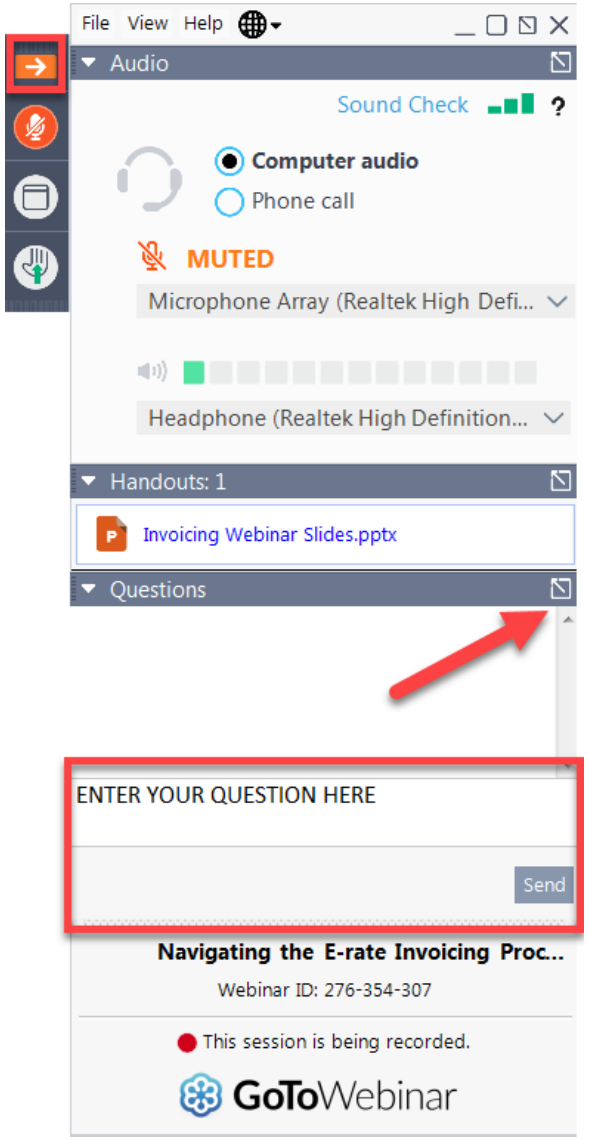
HOUSEKEEPING – Q&A

- **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.



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CLIENT SERVICE BUREAU (CSB)

Call us at (888) 203-8100

Monday – Friday 8:00 a.m. to 8:00 p.m. ET

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.

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MEET OUR WEBINAR STAFF

Nkeshi Free
Moderator

Communications Specialist

John Noran
Presenter

Senior Manager

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AGENDA

1. EPC Administrative Window
2. EPC User Roles and Permissions
3. Important Reminders
4. Q&A

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E-rate Productivity Center (EPC) Administrative Window

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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.

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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.

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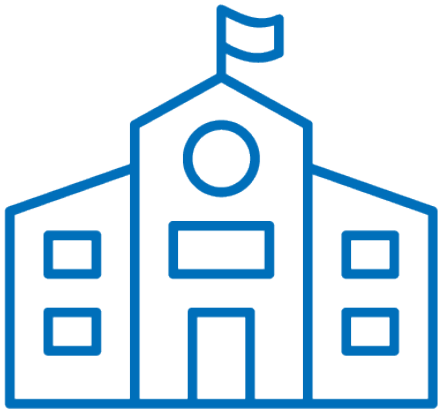
Schools - Update Your Organization's Profile



- **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.**

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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.**

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EPC User Roles and Permissions

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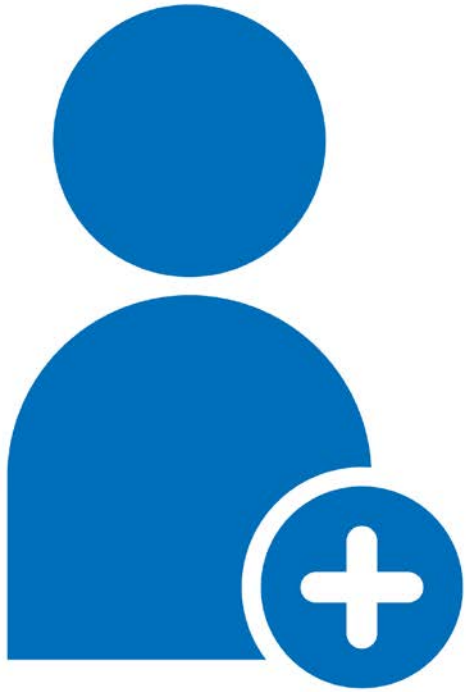
Roles

- **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



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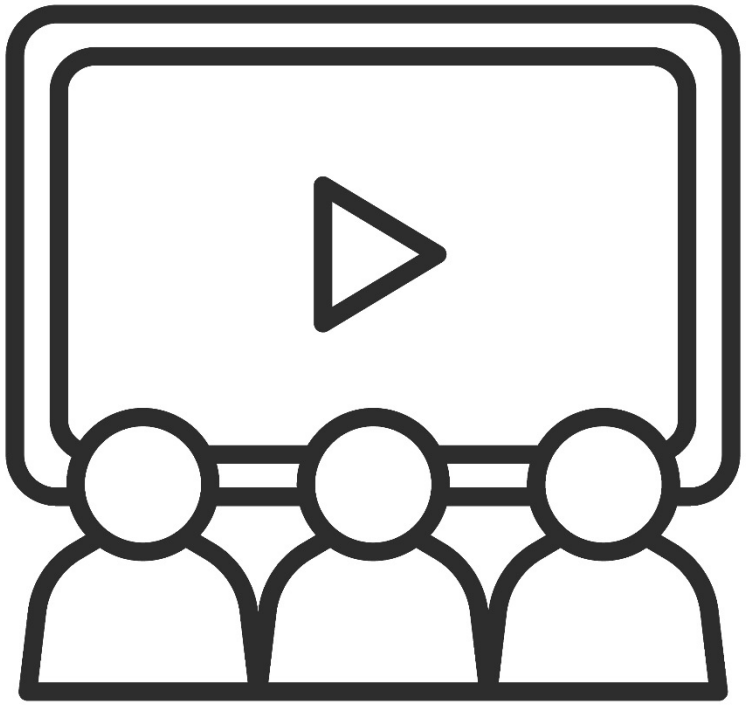
VIDEO

This video will demonstrate how to create a new user.



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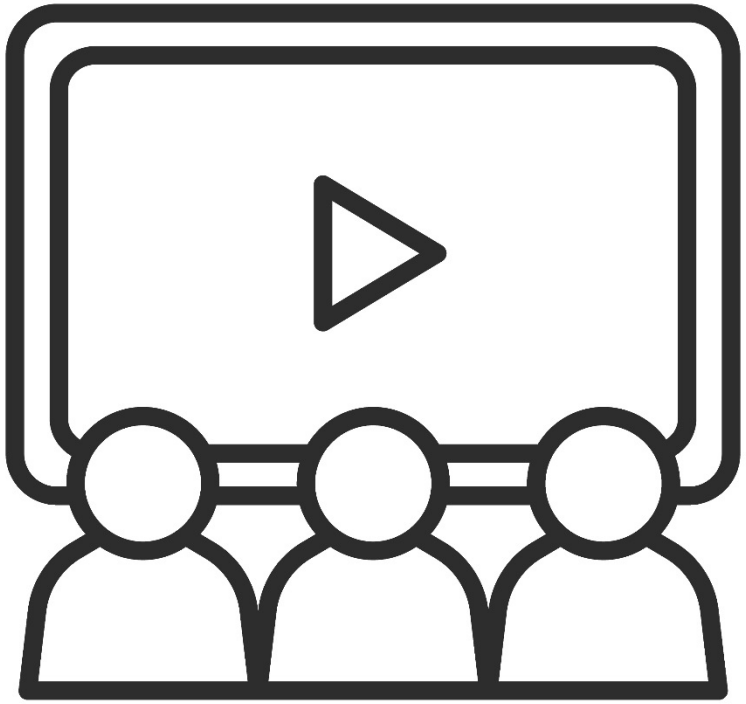
VIDEO

This video will demonstrate how to modify your Account Administrator.



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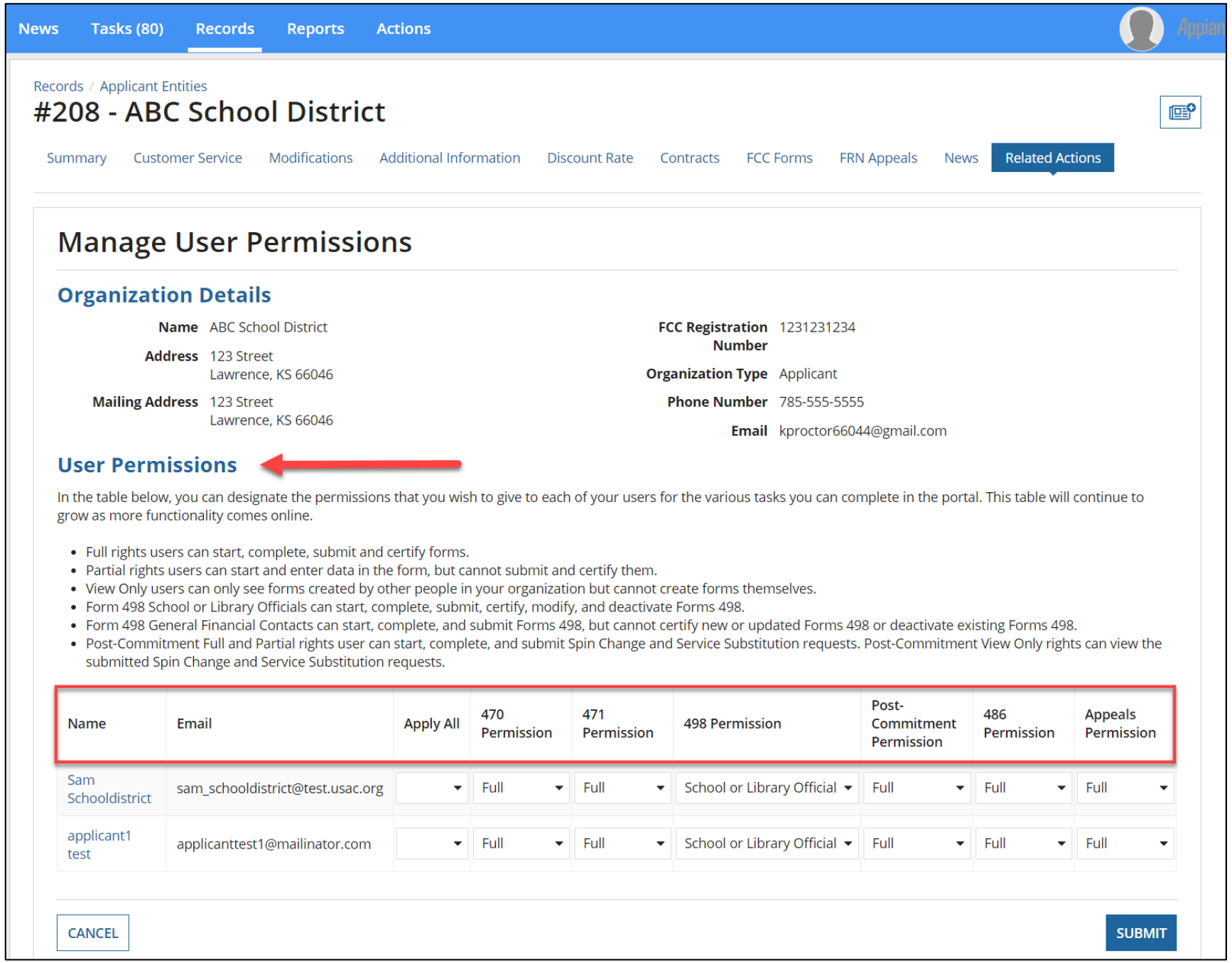
User Permissions



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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.

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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

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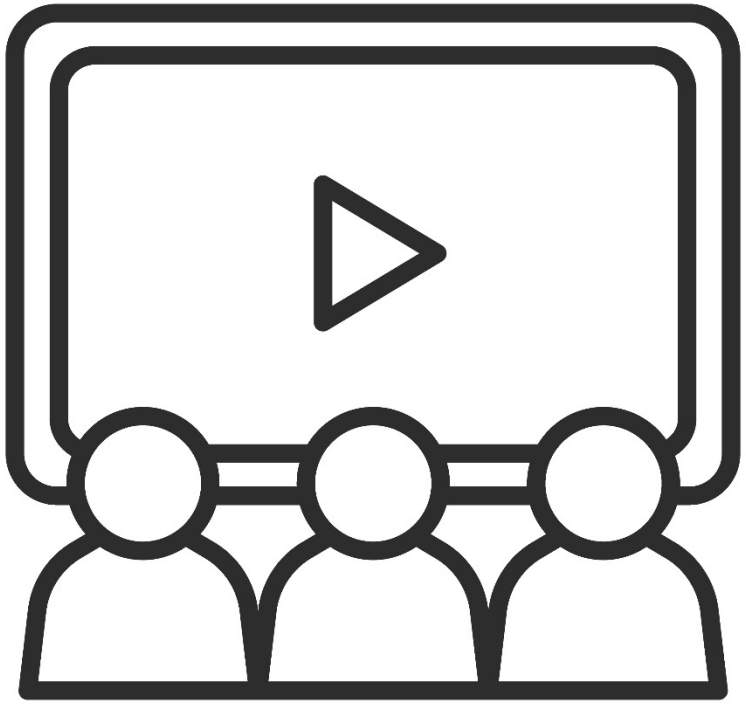
VIDEO

This video will demonstrate how to manage user permissions in EPC.



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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.

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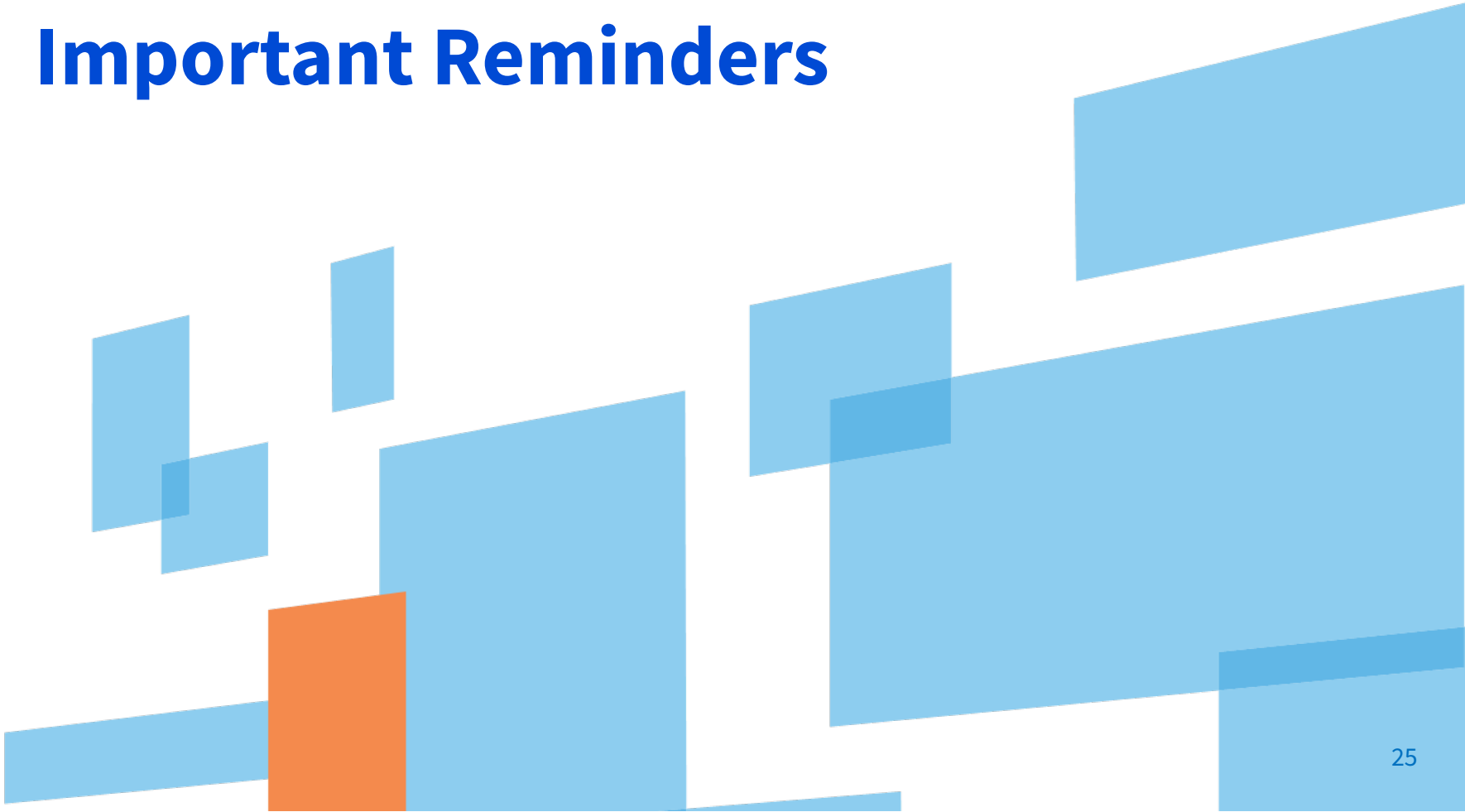
Important Reminders



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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.

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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**.

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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

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FCC Form 498 Assistance

Applicants and Service Providers:

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

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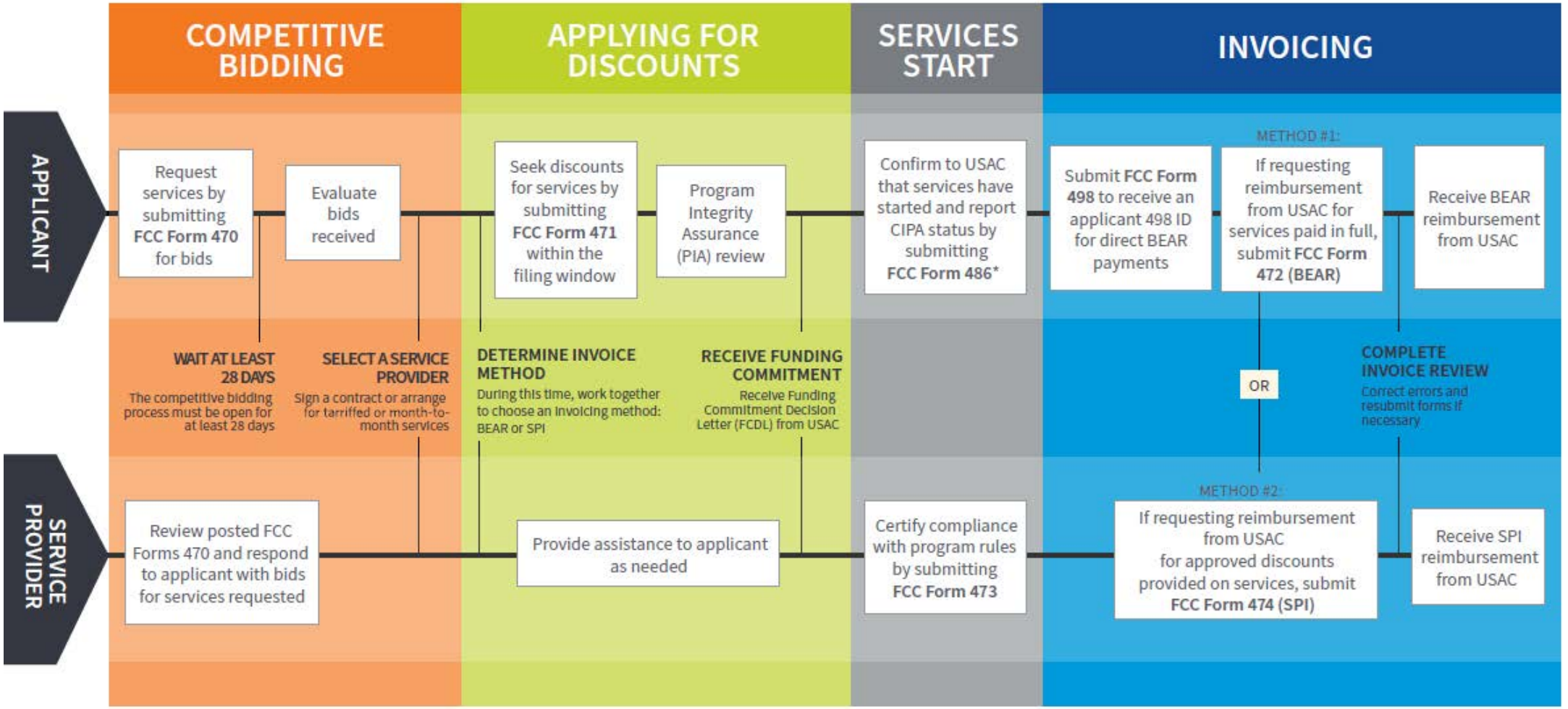
Schools and Libraries (E-rate) Program
APPLICATION PROCESS

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.



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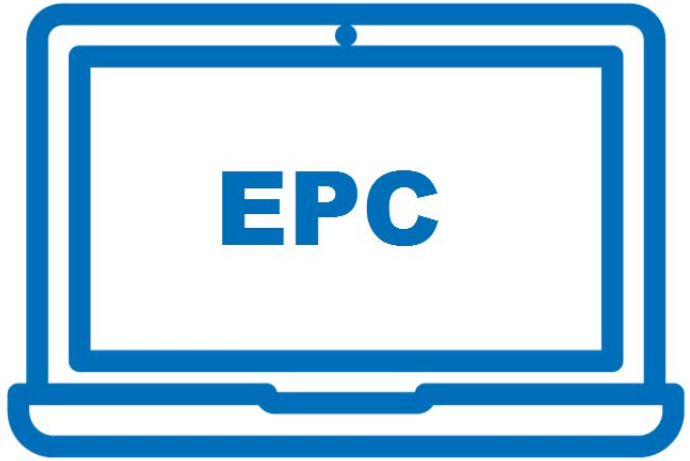
File in the E-rate Productivity Center (EPC)

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



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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*

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HOUSEKEEPING – Q&A

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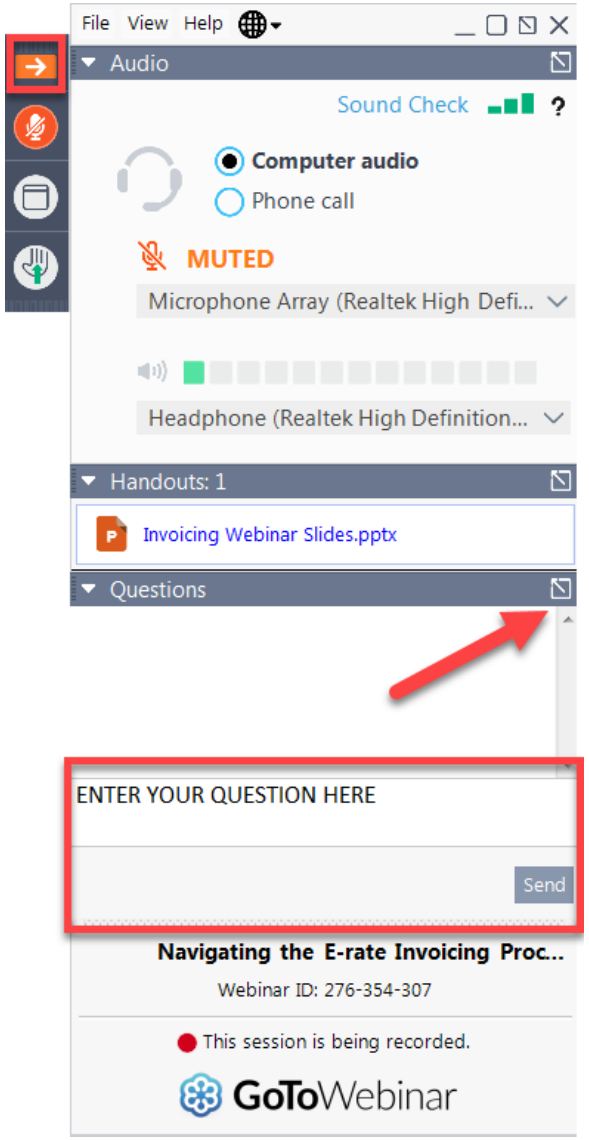

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Q&A SESSION

SUBMIT YOUR QUESTIONS DURING THE LIVE WEBINAR

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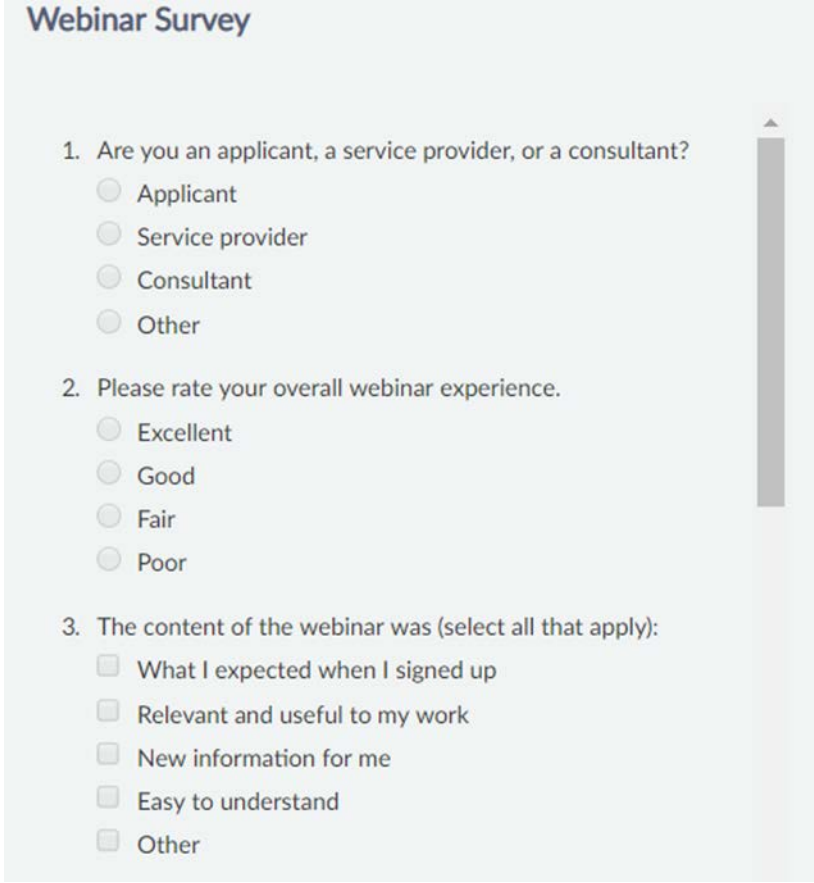

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THANK YOU!

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