



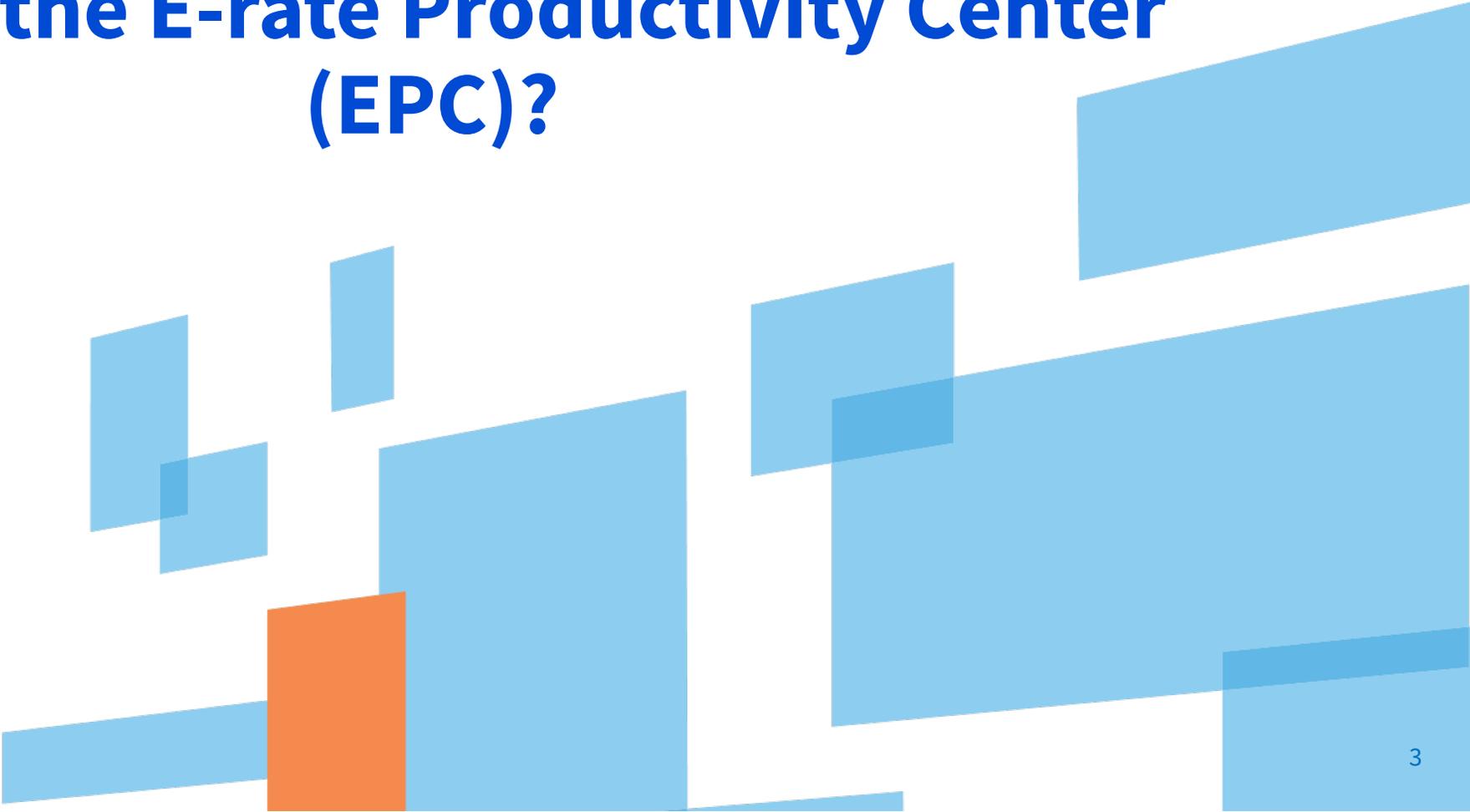
Introduction to the E-rate Productivity Center (EPC)

2018 Applicant Training

AGENDA

1. What is the E-rate Productivity Center (EPC)?
2. Logging into EPC
3. New Users: Terms and Conditions
4. My Landing Page
5. Navigation Bar
6. Your EPC Entity Profile

What is the E-rate Productivity Center (EPC)?

A decorative graphic consisting of several overlapping, semi-transparent rectangular shapes in various shades of blue and one solid orange rectangle. The shapes are arranged in a way that suggests movement or a layered structure, with some appearing to be in front of others.

Poll the Audience -

- Who in the audience has logged into EPC?
- Who in the audience is an Account Administrator?
- Who in the audience has User rights in EPC?
- Who has no idea?



E-RATE PRODUCTIVITY CENTER (EPC)

- What is EPC?
 - Account and application management portal
 - Manage program processes, receive notifications, and contact customer service.
- What can you do in EPC?
 - File most program forms
 - Maintain a list of your related entities
 - Update entity information
 - **Account Administrators** can add users on their organization's account and assign them rights (permissions) to file program forms.



E-RATE PRODUCTIVITY CENTER (EPC)

- What web browsers are supported by EPC?

Browser	Comments
Microsoft Edge	Microsoft Edge is only supported on Windows 10 operating systems.
Microsoft Internet Explorer 11	Microsoft Internet Explorer 11 is supported on Windows operating systems. Microsoft Internet Explorer 11 is supported on Windows 8.x tablet. Running Internet Explorer in Enterprise or Document Mode to emulate older browser versions is not supported.
Mozilla Firefox	Mozilla Firefox updates automatically. EPC supports the most recent stable version of Mozilla Firefox.
Google Chrome	Google Chrome updates automatically. EPC supports the most recent stable version of Google Chrome.
Apple Safari	Safari is only supported on Mac operating systems.

Logging into EPC

Step 1:

Go to EPC:

- <https://portal.usac.org/suite/>



Step 1:



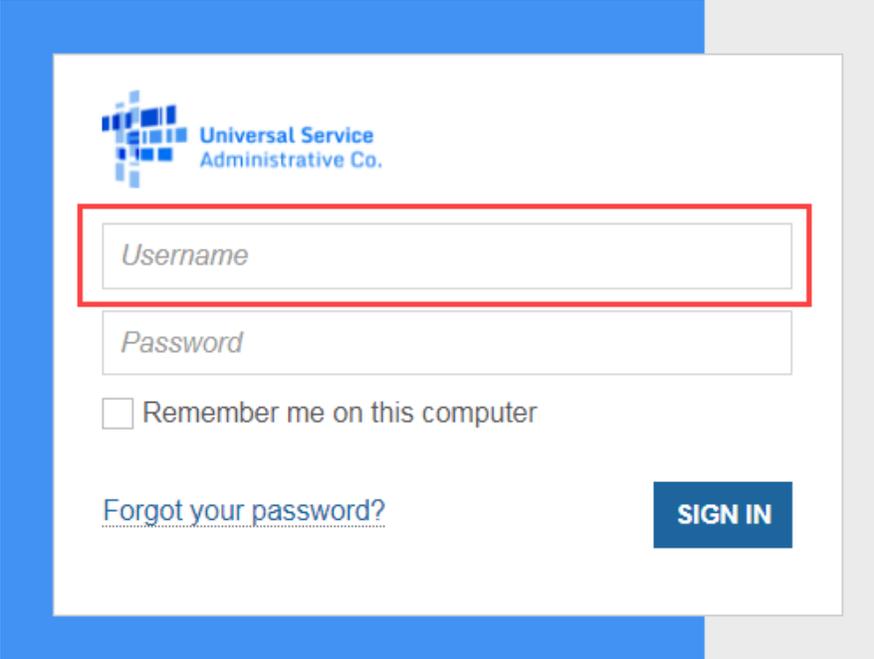
You are accessing a Universal Service Administrative Company (USAC) system. This system is to be used to administer participation in the federal Universal Service Schools and Libraries support mechanism in compliance with 47 C.F.R. § 54, Subpart F. This system may be accessed by authorized users only. By logging in, the user represents that he/she is an authorized user. This system's usage may be monitored, recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary and/or legal action, including criminal prosecution and civil penalties. Use of this system indicates acceptance of these terms. Additional terms (i.e., a user access agreement or contract) may govern your use of this system.

To accept these terms, click "I Agree."

I AGREE

Step 2: Logging In

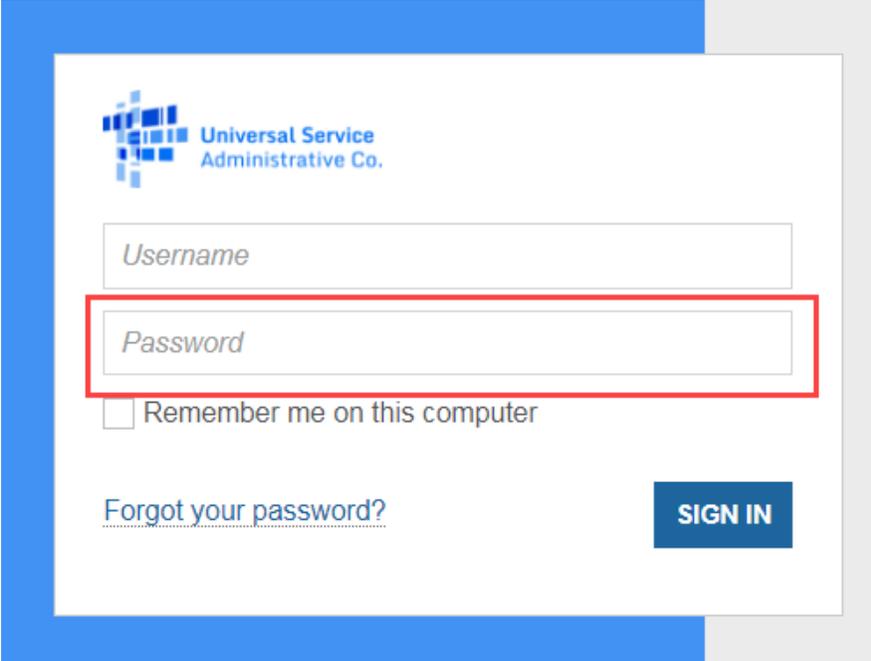
- Tips for Entering your Username
 - Type in your username instead of copying and pasting.
 - Enter it in **all lowercase**.
 - Make sure there are no spaces or erroneous characters in the username.
 - Check for typos.



The screenshot shows the login interface for Universal Service Administrative Co. At the top left is the company logo, a grid of blue squares, followed by the text "Universal Service Administrative Co.". Below the logo are two input fields: "Username" and "Password". The "Username" field is highlighted with a red border. Below the "Password" field is a checkbox labeled "Remember me on this computer". At the bottom left is a link that says "Forgot your password?". At the bottom right is a blue button with the text "SIGN IN" in white capital letters.

Step 2: Logging In (Continued)

- Tips for Creating your Password
 - Be at least eight characters
 - Has not been used in the previous four passwords
 - Contains at least one numeral (0 through 9)
 - Contains at least one special character (such as !, \$, #, %)
 - Contains at least one uppercase letter (A through Z)
 - Contains at least one lowercase letter (a through z)



Universal Service
Administrative Co.

Username

Password

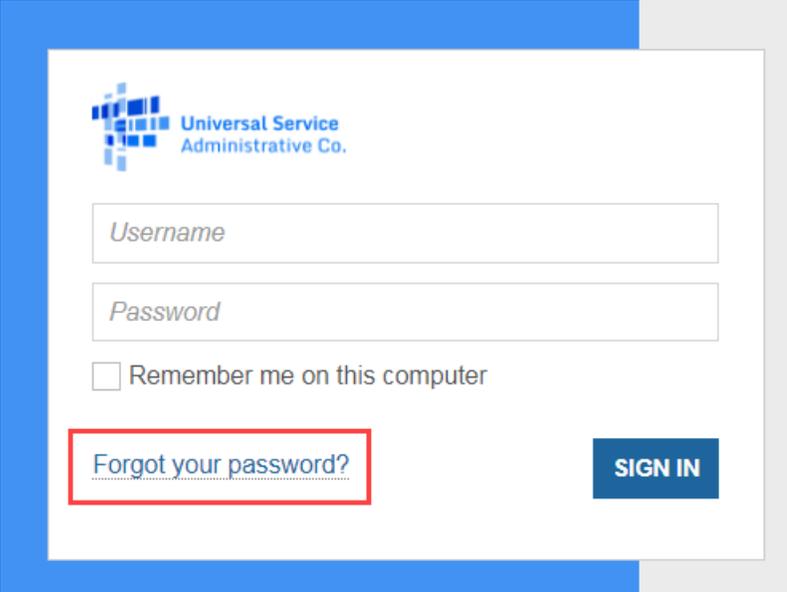
Remember me on this computer

[Forgot your password?](#)

SIGN IN

Step 2: Logging In (Continued)

- Forgot your Password?
- Enter the email address associated with the account (the EPC username).
- Click SEND EMAIL.
- You will receive email from portal@usac.org, subject "Universal Service Administrative Company (USAC) Password Reset".



Universal Service Administrative Co.

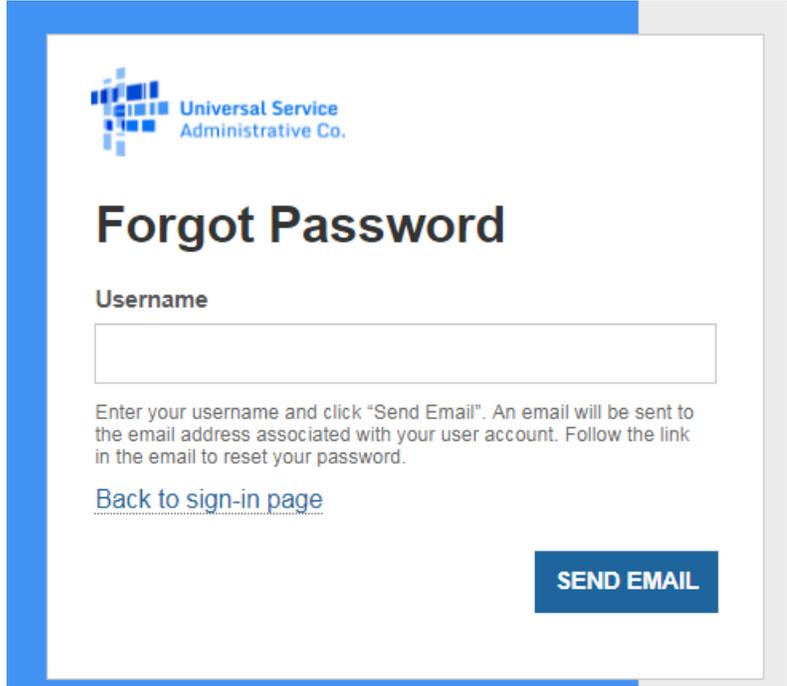
Username

Password

Remember me on this computer

[Forgot your password?](#)

SIGN IN



Universal Service Administrative Co.

Forgot Password

Username

Enter your username and click "Send Email". An email will be sent to the email address associated with your user account. Follow the link in the email to reset your password.

[Back to sign-in page](#)

SEND EMAIL

New Users: Terms and Conditions

A decorative graphic consisting of several overlapping, semi-transparent rectangular shapes in various shades of blue and one solid orange rectangle. The shapes are arranged in a dynamic, layered fashion, creating a sense of depth and movement. The colors range from light sky blue to a vibrant orange.

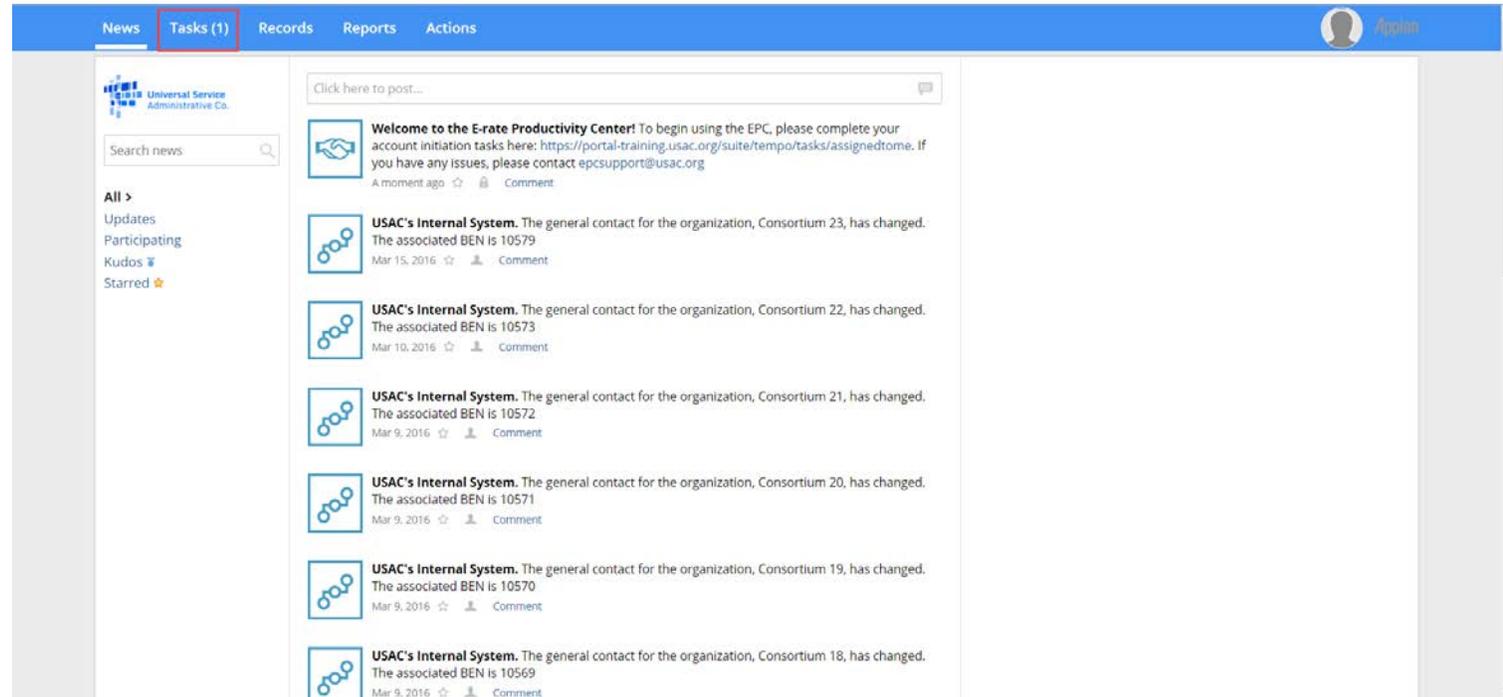
NEW EPC USERS: Terms and Conditions

- In order to access EPC functions, **every user must accept Terms & Conditions.**
- New user accounts are considered inactive and will not have access to anything within EPC until the Terms & Conditions are accepted.
- When a new user is created from an organization, the new user will not appear under the organization's profile until they have accepted the Terms and Conditions.



DEMO NEW EPC USERS: Terms and Conditions

- Once you are created as a new user in EPC:
 - Log in to EPC
 - Once you are logged in, you will be routed to your News screen.
 - Click Tasks (1) on the top left corner



DEMO NEW EPC USERS: Terms and Conditions

The screenshot displays a web application interface for task management. At the top, a blue navigation bar contains the following tabs: News, Tasks (1), Records, Reports, and Actions. On the right side of this bar, there is a user profile icon and the name 'Appian'. Below the navigation bar, the main content area is divided into three vertical sections. The leftmost section is a sidebar containing the 'Universal Service Administrative Co.' logo and several filters: 'Assigned to Me >', 'Sent by Me', 'Starred ☆', 'STATUS' with 'Open ✕' selected, and 'DEADLINE' with options 'Overdue', 'Today', and 'Within 7 days'. The middle section features a search bar with the placeholder text 'Click here to send a task...' and a 'NEWEST' dropdown menu. Below these is a single task card highlighted with a red border. The task card includes a blue checkmark icon, a green arrow pointing to 'Me', the title 'Complete Terms and Conditions', and the text '1 minute ago ☆'. The rightmost section is currently empty.

DEMO NEW EPC USERS: Terms and Conditions

- Read the Terms of Service
- Click the Accept button at the bottom of the screen.
- You will now be able to access your EPC user account and your organization's account!

News Tasks (1) Records Reports Actions

Applan

SAVE DRAFT

Complete Terms of Service Agreement

Please agree to the following Terms of Service before gaining access to EPC.

Terms of Service:

Last Updated October 20, 2017

EPC ACCESS AGREEMENT

This EPC Access Agreement ("Agreement") applies to the E-rate Productivity Center and all E-rate Productivity Center-related systems and networks (collectively "EPC") provided by the Universal Service Administrative Company ("USAC"). Applan Corporation's ("Applan") business process management software suite and associated documentation (collectively the "Software") is a part of EPC. EPC was created in support of the federal Universal Service Schools and Libraries Support Mechanism (also known as the "E-rate Program") that helps entities such as eligible schools and libraries obtain telecommunications at affordable rates.

USAC allows four types of subscribers to access and use EPC, each of which is a "Subscriber" for purposes of this Agreement: (1) applicants ("Applicants"), (2) service providers ("Service Providers"), (3) consultants ("Consultants"), and (4) United States government agencies ("Agency" or "Agencies"), excluding the Federal Communications Commission. This Agreement defines the relationships between both USAC and (i) the Subscriber, and (ii) each person who accesses EPC as authorized by and on behalf of the Subscriber. Both Subscriber and each person who accesses EPC as authorized by and on behalf of the Subscriber are referred to as "you" (and variations such as "your") in this Agreement.

6. Confidentiality of the Software

(a) General. As between the parties, the Software and associated data base contains confidential and proprietary information of USAC and its licensors. You agree not to use the Software except as expressly set forth herein and to maintain reasonable procedures to prohibit the unauthorized disclosure, duplication, misuse or removal of the Software. You agree not to disclose the Software to any third party. Without limiting the foregoing, you agree to use the same procedures and degree of care to avoid unauthorized disclosure or use of the Software as you use to protect your own similar information, but in no event using less than a reasonable degree of care.

(b) Exceptions. The foregoing restrictions will not apply to information that (i) is known to you at the time of communication from USAC or its licensors, (ii) has become publicly known through no wrongful act of you, (iii) has been rightfully received by you from a third party authorized to make such communication without restriction, (iv) has been independently developed by you as evidenced by your written records, or (v) is required to be disclosed pursuant to a subpoena or other validly issued administrative or judicial process, provided that you must give USAC sufficient notice of such disclosure to allow USAC and its licensors a reasonable opportunity to object to and take necessary legal action to prevent such disclosure. Notice must be provided to USAC's Client Service Bureau at 1-888-203-8100.

7. Miscellaneous.

Each party is an independent contractor and nothing herein will be deemed to constitute the parties as partners, agents or joint ventures. Any disputes or claims that you may bring against USAC under or related to this Agreement must be brought consistent with the requirements of 47 C.F.R Part 54, Subpart I. This Agreement (including without limitation notices and any other USAC documentation referenced herein) embodies the entire agreement between the parties and supersedes all previous and contemporaneous agreements, understandings and arrangements, with respect to the subject matter hereof.

ACCEPT DECLINE

My Landing Page

A decorative graphic consisting of several overlapping, semi-transparent rectangular shapes in various shades of blue and one solid orange rectangle. The shapes are arranged in a dynamic, layered composition that suggests movement and depth, primarily located in the lower right and bottom center of the slide.

Ask the Audience -

- What functions can be performed from your landing page?



DEMO SLIDE My Landing Page

News Tasks Records **Reports** Actions

Applan

My Landing Page



Universal Service Administrative Co.

Welcome, Consortium-200085!

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Hurricane Impact Designation](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Notifications

Notification Type

Funding Year

Status All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

Entity	Entity Number	City	State	Zip Code
Consortium-200085	11547	The City	MD	20850

Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
---------	-------	----------	--------	--------------

DEMO SLIDE My Landing Page: Notifications

Notifications

Notification Type

Please select a value



Status ?

All

Generated

Not Generated

Funding Year

-- Select a Funding Year --



Notification	Description	Issued Date	Generated By	Generated On	
No items available					

- Notifications
 - Applicants can view their decision letters (FCDL, FCC Form 486 Notification Letters, FCC Form 486 Certification, etc.) by funding year.

DEMO SLIDE My Landing Page: My Entities

My Entities

Entity	Entity Number	City	State	Zip Code
Testing SD 123	19554	Lake Oswego	OR	97034
quiz	19700	test	VA	12345
Egret Quiz	19701	Chesapeake	VA	23320

- My Entities
 - For applicants: My Entities will display all entities you have rights to access.
 - For consultants: My Clients will display all client entities associated with the consulting firm.

DEMO SLIDE My Landing Page: Customer Service Cases

- Customer Service Cases
- You will see all the customer service cases you have opened.

▼ Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
1424	Online Navigation Help	FCC Form Review	Pending Customer	5/21/2018 12:02 PM EDT
1425	Online Navigation Help	FCC Form Help	Closed	5/21/2018 12:03 PM EDT
1426	Online Navigation Help	Finding FCC Forms	Closed	5/21/2018 12:03 PM EDT
1427	Online Navigation Help	Finding Forms	Closed	5/21/2018 12:04 PM EDT
1428	Online Navigation Help	Finding FCC Forms	Closed	5/21/2018 12:05 PM EDT
1429	Online Navigation Help	Finding FCC Forms	Pending	5/21/2018 12:06 PM EDT
1430	Online Navigation Help	Finding FCC Forms	Closed	5/21/2018 12:06 PM EDT
1431	Online Navigation Help	Finding FCC Forms	Closed	5/21/2018 12:08 PM EDT
1432	Online Navigation Help	Finding FCC Forms	Closed	5/21/2018 12:08 PM EDT
1433	Online Navigation Help	Finding FCC Forms	Pending Customer	5/21/2018 12:09 PM EDT
1434	Online Navigation Help	Finding FCC Forms	Closed	5/21/2018 12:10 PM EDT
1435	Other	Finding FCC Forms	Closed	5/21/2018 12:11 PM EDT
1436	Online Navigation Help	Finding FCC Forms	Pending	5/21/2018 12:11 PM EDT

13 items

DEMO SLIDE My Landing Page: FCC Forms and Post-Commitment Requests

▼ FCC Forms and Post-Commitment Requests

FCC Forms

Post-Commitment Requests

Form Type

Funding Year

Status All

Incomplete

Certified

Nickname	Application Number	Funding Year	Status
No items available			

- FCC Forms and Post Commitment Requests
 - Users can view all of their FCC Forms by funding year.
 - FCC Form 470, FCC Form 471, FCC Form 486, FCC Form 500

EPC Navigation Bar

EPC Navigation Bar

News Tasks (3) Records Reports Actions



- Made up of five tabs:
 - News
 - Tasks
 - Records
 - Reports
 - Actions

EPC Navigation Bar – News

- Populate notifications on actions taken in EPC
- Entity Changes
- Successful application submissions
- All USAC Notifications (e.g., Funding Commitment Decision Letter)

EPC Navigation Bar – Tasks

News

Tasks (3)

Records

Reports

Actions



- Tasks populate notifications that require action by the user.
- Leaving an incomplete form (whether voluntary or accidental) will populate a task.
- Completing data entry on a form will populate a task to certify the form.
- PIA inquiries will populate a task.

EPC Navigation Bar – Records

News Tasks (3) **Records** Reports Actions



- Contains all the records within EPC
 - All Entities
 - Applications
 - Customer service cases

EPC Navigation Bar – Reports

News Tasks (3) Records **Reports** Actions



- This tab allows users to view various Reports depending on their rights in EPC.
 - My Submitted Modification Requests (RAL)
 - My Landing Page

EPC Navigation Bar – Actions

News Tasks (3) Records Reports **Actions**



- This tab allows users to take various Actions depending on their rights in EPC.
 - Create a Customer Service Case (Contact Us)
 - Create a Whistleblower Case
 - Search and Export Certified FCC Forms 470 and 471

Your EPC Entity Profile

An abstract graphic consisting of several overlapping, semi-transparent rectangular shapes in various shades of blue and one solid orange rectangle. The shapes are arranged in a way that suggests a modern, layered design, with some shapes appearing to be in front of others, creating a sense of depth and movement.

Ask the Audience -

- How can you navigate to your EPC profile?



EPC Entity Profile – How do I get there from My Landing Page?

News Tasks Records **Reports** Actions

Applan

My Landing Page

Universal Service Administrative Co.

Welcome, [Consortium-200085!](#)

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Hurricane Impact Designation](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Notifications

Notification Type

Funding Year

Status All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

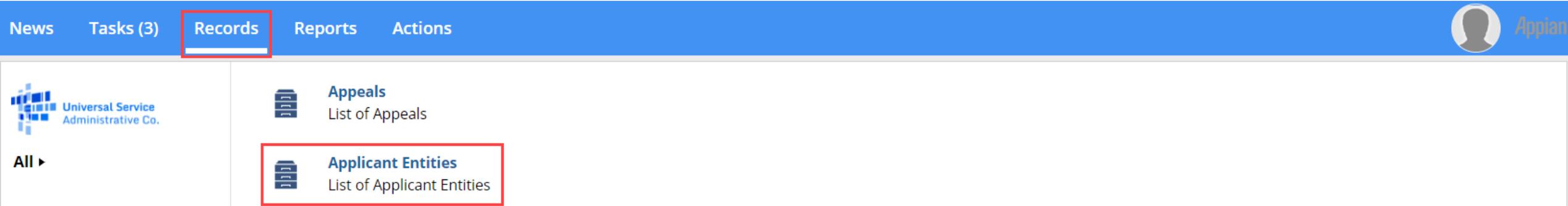
My Entities

Entity	Entity Number	City	State	Zip Code
Consortium-200085	11547	The City	MD	20850

Customer Service Cases

Case ID	Topic	Nickname	Status	Date Created
---------	-------	----------	--------	--------------

EPC Entity Profile – How do I get there from the Records tab?



The screenshot shows a software interface with a blue navigation bar at the top. The navigation bar contains the following items: 'News', 'Tasks (3)', 'Records' (highlighted with a red box), 'Reports', and 'Actions'. On the right side of the navigation bar, there is a user profile icon and the name 'Applan'. Below the navigation bar, there is a sidebar on the left with the 'Universal Service Administrative Co.' logo and the text 'All >'. The main content area contains two menu items: 'Appeals' with a list icon and the text 'List of Appeals', and 'Applicant Entities' with a list icon and the text 'List of Applicant Entities'. The 'Applicant Entities' item is highlighted with a red box.

EPC Entity Profile – Account Administrator View

Records / Applicant Entities

#11296 - New Consortia 3

 CREATE A NEW USER ADD OR REMOVE EXISTING USERS MANAGE USER PERMISSIONS 

- Summary**
- Customer Service
- Modifications
- Additional Information
- Contracts
- FCC Forms
- FRN Appeals
- News
- Related Actions

Organization Details

Name New Consortia 3
Entity Number 11296
FCC Registration Number 0123456789

Applicant Type Consortium
Status Active

Contact Information

Physical Address 123 Florida street
Hollywood , FL 33019
Mailing Address 123 Florida street
Hollywood , FL 33019

Phone Number 954-222-7777
Email newcon3@testmail.usac.org
Website URL www.google.com

- Manage Organization
- Modify Account Administrator
- Create a Customer Service Case
- Manage General Contact
- Manage Organization Relationships
- Create FCC Form 470
- Create FCC Form 471
- Create FCC Form 486
- Manage Contracts
- Create Appeal
- Create SPIN Change Request

EPC Entity Profile – Full Rights User View

Records / Applicant Entities

#19554 - Testing SD 123

 [MANAGE ORGANIZATION](#) [CREATE A CUSTOMER SERVICE CA...](#) [MANAGE ORGANIZATION RELATI...](#) 

- Summary**
- Customer Service
- Modifications
- Additional Information
- Discount Rate
- Contracts
- FCC Forms
- FRN Appeals
- News
- Related Actions

- Create FCC Form 470
- Create FCC Form 471
- Create FCC Form 486
- Manage Contracts
- Create Appeal
- Create SPIN Change Request
- Create Service Substitution Request
- Create FCC Form 500
- Hurricane Impact Designation

Organization Details

Name Testing SD 123
Entity Number 19554
FCC Registration Number 1234567890

Applicant Type School District
Status Active

Contact Information

Physical Address 2455 Country Club Rd
Lake Oswego, OR 97034
Mailing Address 2455 Country Club Rd
Lake Oswego, OR 97034

Phone Number 123-456-7898
Email
Website URL

Ask the Audience -

- What is the difference between the Account Administrator's rights and a regular user?
- Who can be an Account Administrator?



EPC Entity Profile: Parent-Child Relationship (School District or Library System)

- To see if other entities are linked to your organization, use the Additional Information Tab.
- For Example: A School district would like to know if the correct schools are linked to them in EPC.
 - Click **Additional Information**.
 - Under category selected **Related Organizations**.
 - Under Relationship Type select **Related Entities**.

The screenshot shows the EPC system interface for entity #19555 - Testing School 123. The 'Additional Information' tab is selected. The 'Category' dropdown is set to 'Related Organizations' and the 'Relationship Type' dropdown is set to 'Related Entities'. Below these are empty 'Entities' search fields.

Entity Number	Entity Name	City	State	Zip Code
No items available				

EPC Entity Profile: Contracts

Records / Applicant Entities

#19554 - Testing SD 123



Summary Customer Service Modifications Additional Information Discount Rate **Contracts** FCC Forms FRN Appeals News Related Actions

- 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.

EPC Entity Profile: FCC Forms

Records / Applicant Entities

#19554 - Testing SD 123

 [CREATE FCC FORM 470](#) [CREATE FCC FORM 471](#) [CREATE FCC FORM 486](#) [...](#)

[Summary](#) [Customer Service](#) [Modifications](#) [Additional Information](#) [Discount Rate](#) [Contracts](#) **[FCC Forms](#)** [FRN Appeals](#) [News](#) [Related Actions](#)

Category

- To find information on FCC Forms 470, 471, 486 or 500 by funding year, use the FCC Forms tab on your Entity Profile

EPC Entity Profile: FRN Appeals

Records / Applicant Entities

#19554 - Testing SD 123



Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms **FRN Appeals** News Related Actions

- To find information on all appeals submitted by the entity use the FRN Appeals tab.

EPC Entity Profile: News

Records / Applicant Entities

#19554 - Testing SD 123



Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals **News** Related Actions

- To view recently issued decision letters (Funding Commitment Decision Letters, FCC Forms 486 Notification Letters, etc.) for this entity use the News tab.

Pop Quiz-

- What are the 3 areas you can locate your Funding Commitment Decision Letter?
- Where can you find your Program Integrity Assurance (PIA) inquiries?
- Who can create a new entity?
- Who can manage user permissions?
- If all fails who can help you?

