

E-RATE PRODUCTIVITY CENTER (EPC) APPLICANT USER GUIDE

Filing the FCC Form 498

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E-RATE PRODUCTIVITY CENTER (EPC) APPLICANT USER GUIDE

Filing the FCC Form 498

Purpose of FCC Form 498

The FCC Form 498 is used to collect contact, remittance, and payment information for service providers and applicants that receive support from the federal universal service programs. For greater flexibility, this form allows service providers to use the same information for all of the programs, different contact and remittance information for each of the four programs, or multiple contact and remittance information. You must report any changes to this information on a revised FCC Form 498 to prevent any delays in notification and the timeliness of disbursements.

To provide eligible services under this program, service providers must file an FCC form 498 to receive a Service Provider Identification Number (SPIN, also known as a 498 ID) from USAC and certify that they will comply with program rules. In addition, all Schools and Libraries (E-rate) Program applicants (billed entities) receiving payments via the Billed Entity Applicant Reimbursement (BEAR) process need to file the FCC Form 498 in the E-rate Productivity Center (EPC) to receive payment.

Assistance in Completing the FCC Form 498

You may direct any questions about completing this form to USAC via the following options:

Website: http://www.usac.org/about/tools/contact/default.aspx

Email: CustomerSupport@usac.org

Telephone: 888-641-8722

Fax: 888-637-6226

User Accounts

The applicant must submit a customer service case to request that USAC establish user accounts for a School or Library Official or General Financial Contact. Applicants can submit a case via the **Contact Us** link in EPC or call the Client Service Bureau (CSB) at (888) 203-8100.

User Roles and Permissions

User rights are provided on a form by form basis. The designated rights are:

School or Library Official - Full Rights: The user can create, edit, and certify these forms.



- **General Financial Contact** Partial Rights: The user can create (start) and edit these forms; however, they are not able to certify the form. Upon the completion of data entry, the system will be automatically route to full rights users in your organization to await certification.
- No Access No Rights: The user cannot sign.

Note: The account administrator for your organization can modify user's permissions.

Certification Requirements

The FCC Form 498 must be certified by a School or Library Official for the following occurrences:

- 1. To create an FCC Form 498.
- 2. To revise an existing FCC Form 498.
- 3. To deactivate an existing FCC Form 498.

Form Prerequisite

Prior to accessing EPC, you must have:

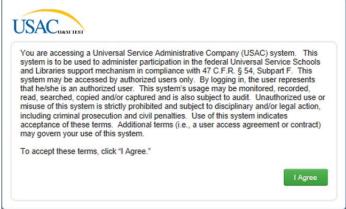
- Applied for a user account by contacting the Client Service Bureau at (888) 203-8100.
- Received an email invitation from <u>admin@portal.usac.org</u> with the subject **USAC EPC-Account** Creation.
- Followed the instructions in the email to setup your username (your email address) and password to sign in.

Note: You will not be able to access the EPC system without a username and password OR user permissions to a designated form.

Applicant Login

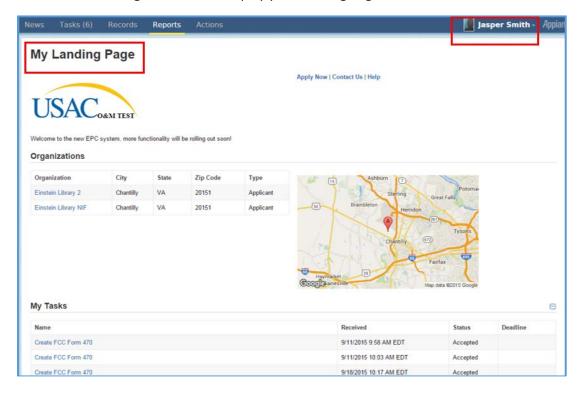
1. Access the system via https://portal.usac.org.



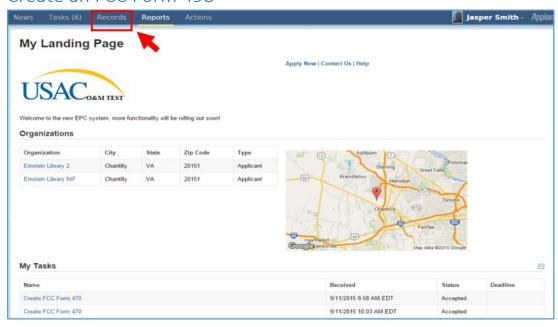




- 2. Enter your **Username** and **Password** and then *click* the **Sign In** button to display the system access information.
- 3. Click the I Agree button to display your Landing Page.

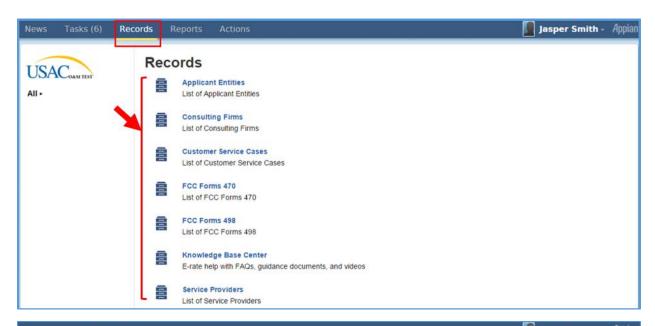


Create an FCC Form 498



1. Click the **Records** tab. The **Records** page displays a list of records.

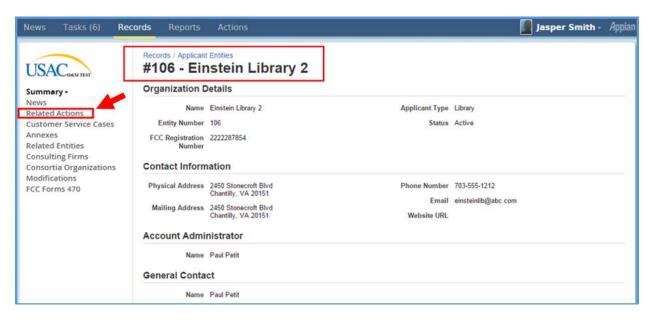




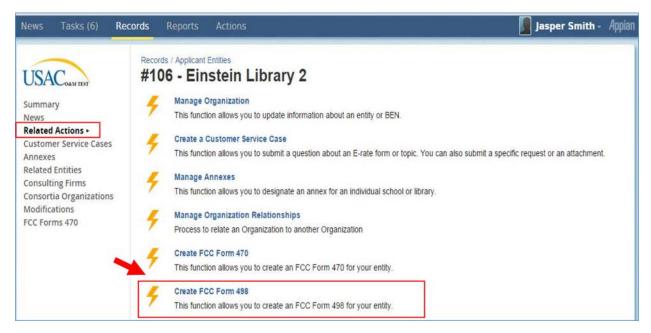


2. Click the Applicant Entities link. The selected entity's page displays.





3. Select the Related Actions link. The Related Actions options displays.



4. Select the Create FCC Form 498 link. The Create a FCC Form 498 page displays.



Basic Information

The Basic Information page requests information regarding the **Application Nickname** and **Organization Information**.



- 5. Enter information into all fields.
- 6. *Click* the **Save and Continue** button.



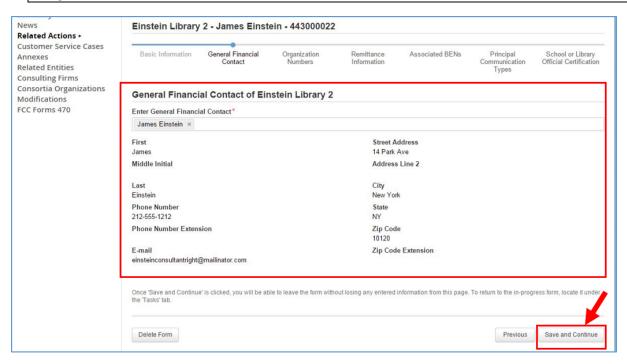
General Financial Contact

The General Financial Contact page requests information on the organization's contacts.



7. Enter information into the appropriate field.

Note: This information will automatically populate the contact information when the name of an assigned contact is entered, as shown below.



8. Click the Save and Continue button.



Organization Numbers

The Organization Numbers page requests Further Details (Federal Employee Identification Number, Dun and Bradstreet Number (DUNS), and FCC Registration Number) information.

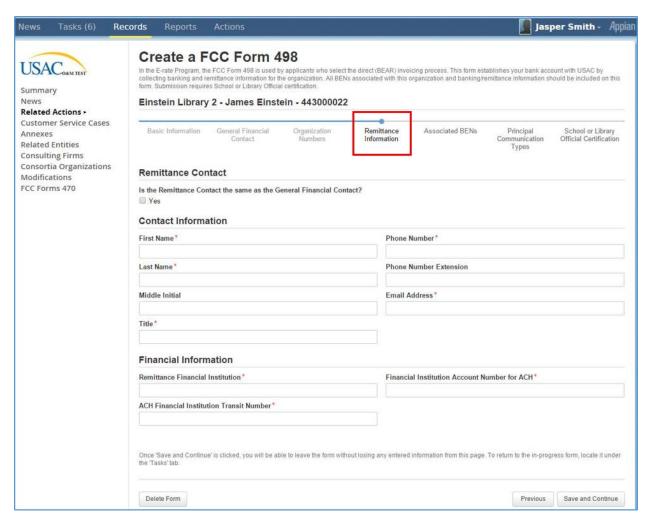


- 9. Enter the appropriate information into each field.
- 10. Click the Save and Continue button.



Remittance Information

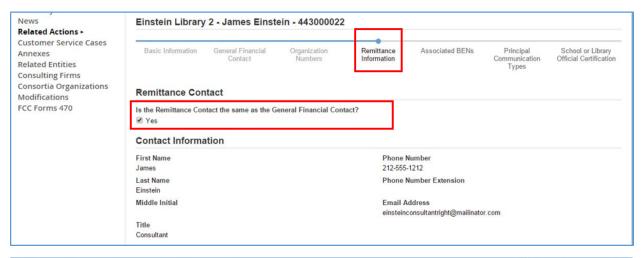
The Remittance Information page requests your **Remittance Contact, Contact Information** and **Financial Information**.

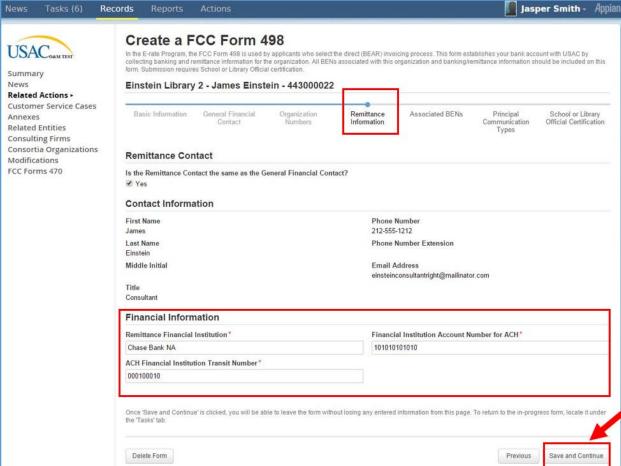


11. *Enter* information into the appropriate fields.

Note: Selecting the Yes check box will automatically populate the Contact Information fields.





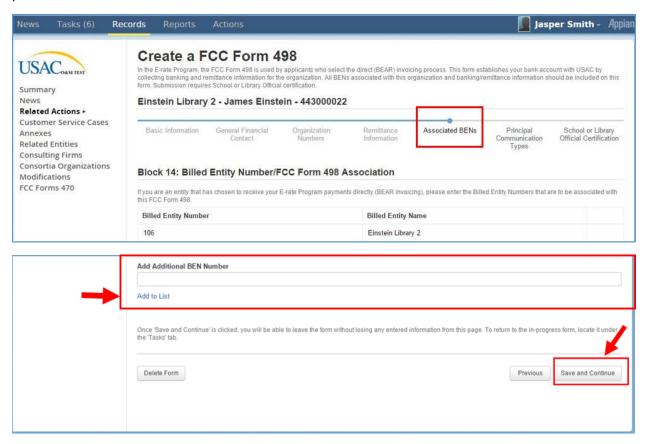


12. Click the Save and Continue button.



Associated BENs

The associated Billed Entity Number (BEN) page requests information regarding the current BEN, Billed Entity Name, and an option for any additional BENs who will use this bank account during the BEAR process.



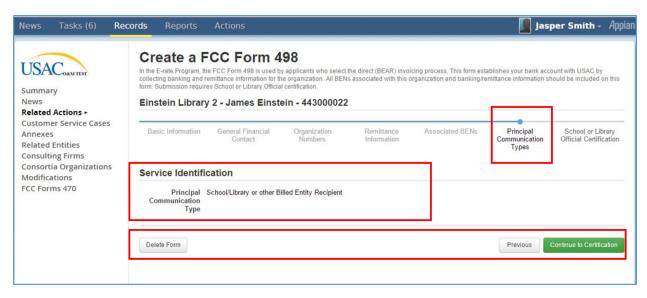
- 13. Enter information into the appropriate fields.
- 14. Click the Add to List link if an additional BEN Number is necessary.
- 15. Click the Save and Continue button.



Principal Communication Types

The Principal Communication Types page displays the **Service Identification** information. For applicants this will always be prepopulated.

Note: Information shown on this page automatically populates from previous captured data.



- 16. Review Service Identification information.
- 17. Select from the following options:
 - a. Click **Delete Form** button to end the certification process.
 - b. Click the **Previous** button to return to the **Associated BENs** page.
 - c. Click Continue to Certification button to proceed with certification. A popup message displays.





18. Click the **No** button to exit the message and return to the **Principal Communication Types** page.

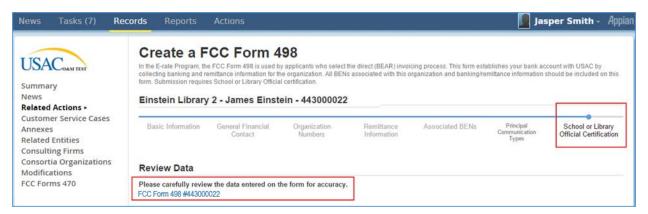
Note: Only the School or Library Official can certify the FCC Form 498. The General Financial Contact can only submit the form.

19. *Click* the **Yes** button to continue. Selecting this option displays the School or Library Official Certification page.

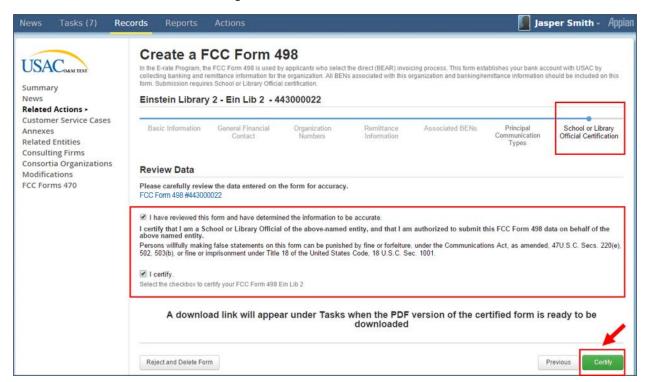


School or Library Official Certification

The School or Library Official Certification page requests that a School or Library Official review the form for accuracy and, if in agreement, to certify the information.



- 20. Review the information by clicking the FCC Form 498 link. The form displays for review.
- 21. Close the form after reviewing information.



22. Select both **check boxes** in the Review Data section, if acceptable.

Note: Both check boxes must be selected to continue the certification process.

- 23. Select from the following options:
 - a. *Click* the **Reject and Delete Form** button to discontinue the Create a FCC Form 498 process. All of the information entered will be deleted.

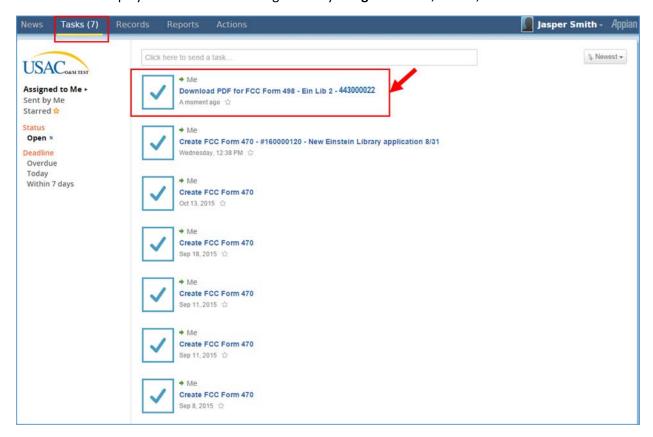


- b. Click the Previous button to return to the Principal Communication Types page.
- c. *Click* the **Certify** button to complete the Create a Form 498 process. Selecting this option displays the **Tasks** tab.

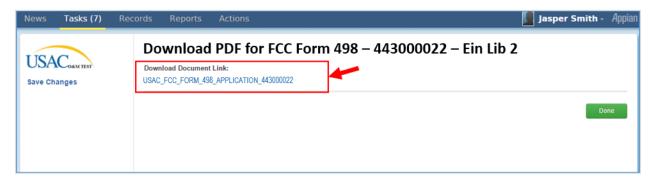
Note: If the Certify button is selected, a download link will appear under the **Tasks** tab when the PDF version of the certified form is ready to be downloaded.

View Form

The Tasks tab displays the user's tasks categorized by Assigned to Me, Status, and Deadline.

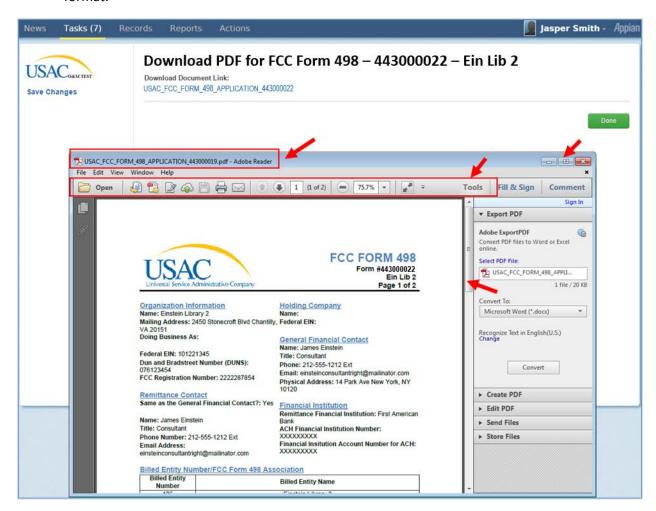


24. *Click* the **Download PDF for FCC Form 498** link. The **Download PDF for FCC Form 498** page displays.





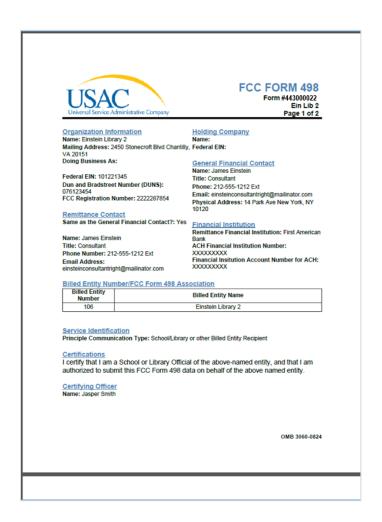
25. *Click* **the Download Document Link**. Your **USAC FCC Form 498 Application** displays in PDF format.



26. Use the Scroll bar to view document OR click the Maximize button to enlarge the document.

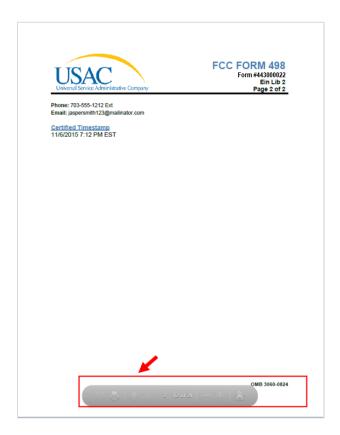
Note: Select options on the PDF toolbar to Open, Save, or Print the document, if preferred.



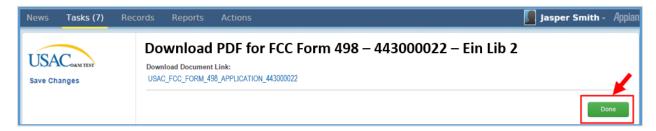


- 27. Select the following options from the page toolbar, if applicable:
 - a. *Click* the **Save** button to save a copy of the document for your records.
 - b. Click Print button to print the document.
 - c. Click the **Minus (-)** button to minimize the view.
 - d. Click the Plus (+) button to enlarge view.
 - e. *Click* the **Home** button to return to the Home page view.





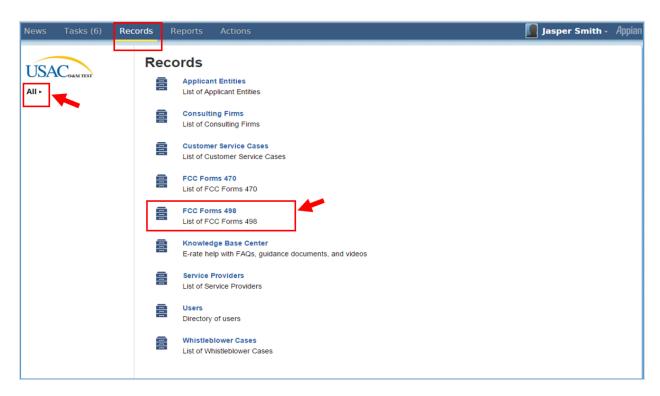
- 28. Complete your selected options and then exit Download PDF for FCC Form 498 page.
- 29. Click the **Done** button. The **Records** tab will display.



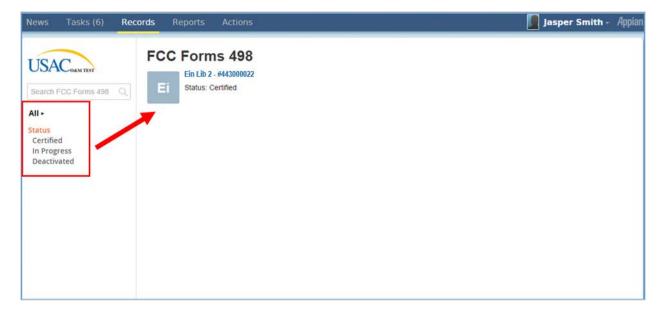
Modify FCC Form 498

The information in the FCC Form 498 document can be modified. The **Records** tab will display your records and the status of each record.





1. *Click* the **drop-down** arrow next to the **ALL** topic OR *click* the **FCC Forms 498** link. The three Status options and records display.



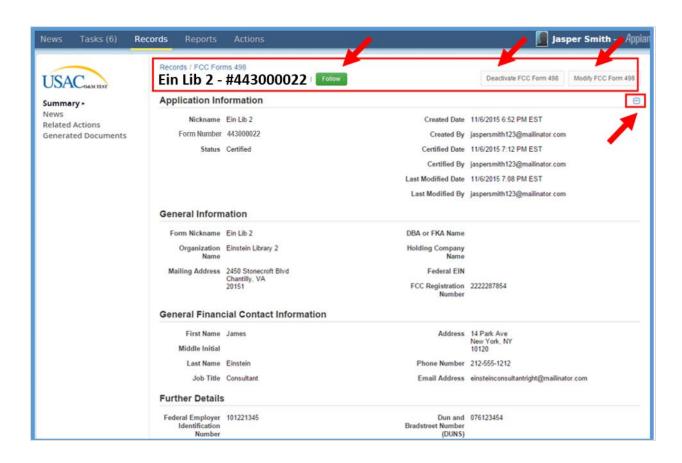
The Nickname and Form Number assigned to the form will display under the Forms 498 topic.





2. Click the Nickname (Example: Ein Lib 2 – 443000022) link. The form information displays.

Note: The Search field can also be used to retrieve records when multiple records exist.



Note: A **Follow** button displays. *Click* the **Follow** button to see news related to this record in your news feed (optional).

3. Click the Collapse (-)/Expand (+) button to adjust the view.

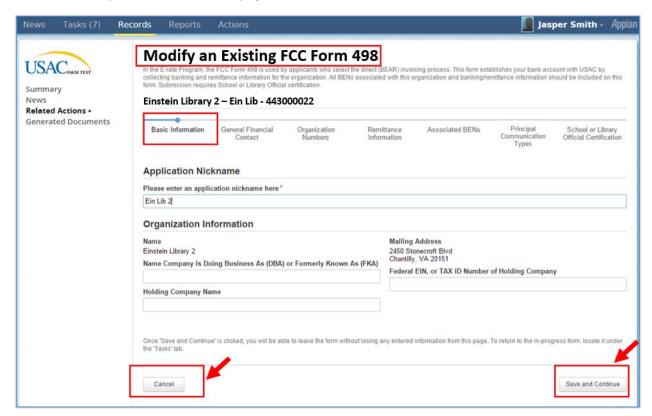
Note: Do not select the Deactivate FCC Form 498 button to modify the form.



4. Click the Modify FCC Form 498 button to update existing information.

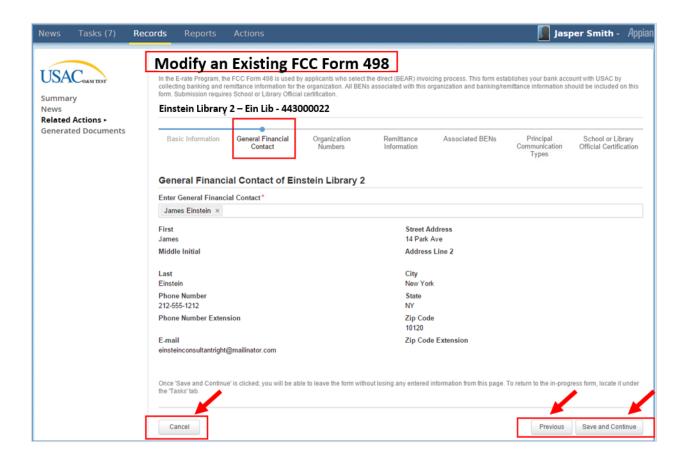


When you select the **Modify FCC Form 498** button, the **Modify an Existing Form 498** page displays. The modification process will take you through the original steps (Basic Information, General Financial Contact, Organization Numbers, Remittance, Associated BENs, Principal Communication Types, and School or Library Official Certification pages).



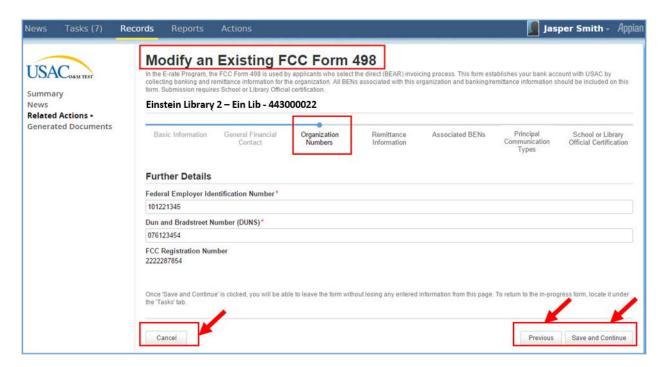
- 5. Review or update information displayed in the Basic Information page.
- 6. *Click* the **Cancel** button to exit the modification process. Selecting this option will discard the new updates.
- 7. *Click* the **Save and Continue** button. Selecting this button will display the **General Financial Contact** page.





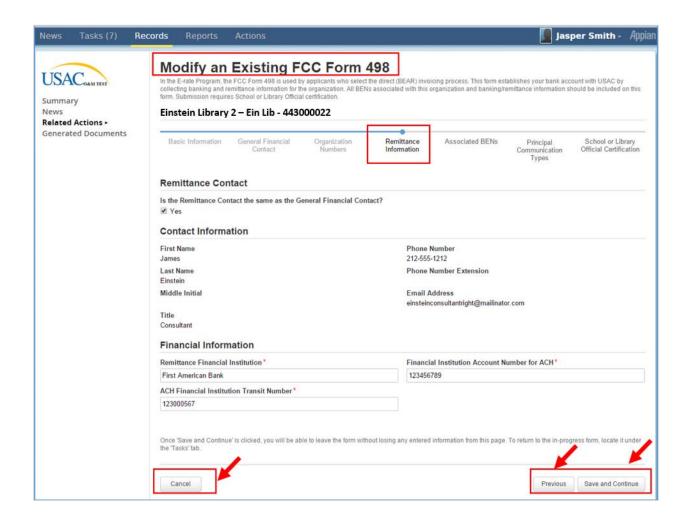
- 8. Review or update information displayed on the General Financial Contact page.
- 9. *Click* the **Cancel** button to exit the modification process. Selecting this option will discard the new updates.
- 10. *Click* the **Previous** button to return to the **Basic Information** page.
- 11. *Click* the **Save and Continue** button. Selecting this button will display the **Organization Numbers** page.





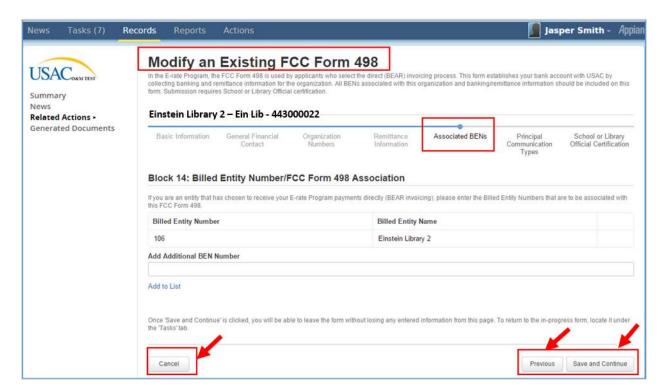
- 12. Review or update information displayed on the Organization Numbers page.
- 13. *Click* the **Cancel** button to exit the modification process. Selecting this option will discard the new updates.
- 14. Click the Previous button to return to the General Financial Contact page.
- 15. *Click* the **Save and Continue** button. Selecting this button will display the **Remittance Information** page.





- 16. Review or update information displayed on the Remittance Information page.
- 17. *Click* the **Cancel** button to exit the modification process. Selecting this option will discard the new updates.
- 18. Click the **Previous** button to return to the **Organization Numbers** page.
- 19. Click the Save and Continue button. Selecting this button will display the Associated BENs page.





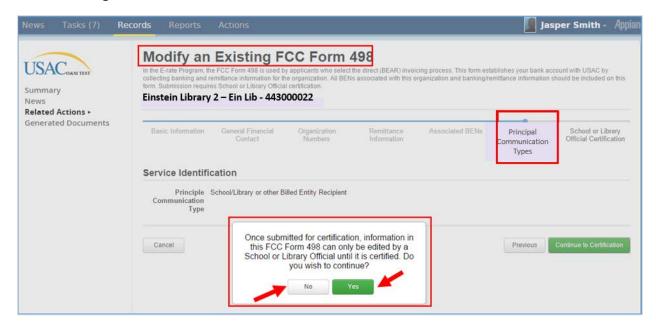
- 20. Review or update information displayed on the Associated BENs page.
- 21. *Click* the **Cancel** button to exit the modification process. Selecting this option will discard the new updates.
- 22. Click the **Previous** button to return to the **Remittance Information** page.
- 23. *Click* the **Save and Continue** button. Selecting this button will display the **Principal Communication Types** page.



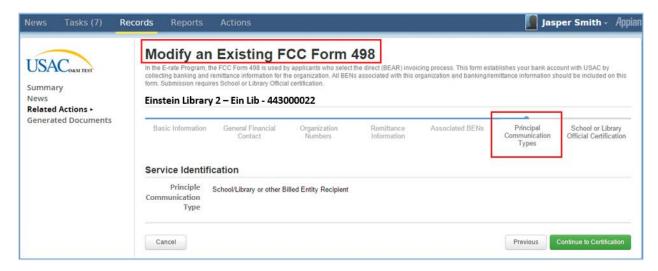
- 24. Review information displayed on the Principal Communication Types page.
- 25. *Click* the **Cancel** button to exit the modification process. Selecting this option will discard the new updates.
- 26. Click the **Previous** button to return to the **Associated BENs** page.



27. *Click* the **Continue to Certification** button. Selecting this button will display a **Submittal warning** message.

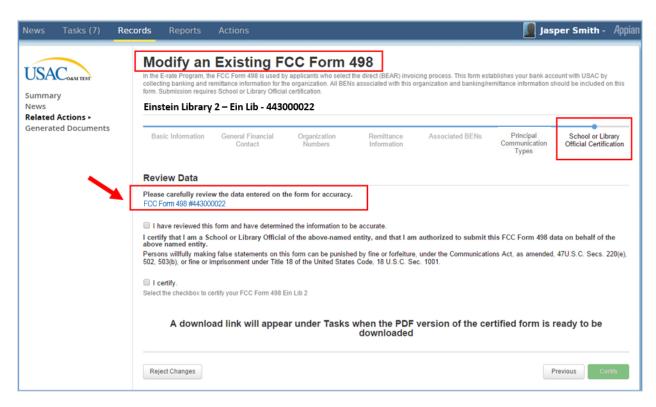


28. *Click* the **No** button to exit the modification submittal process. Selecting this option returns the user to the **Principal Communication Types** page.

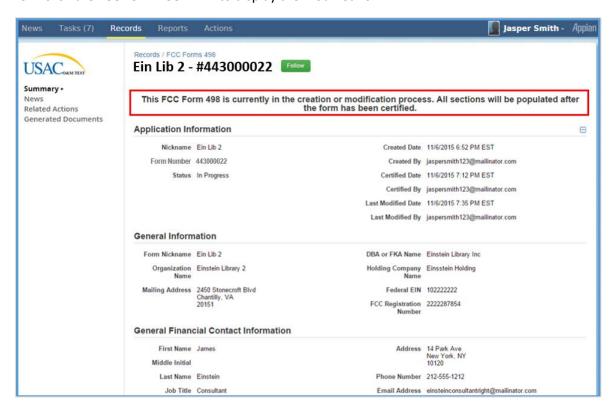


29. *Click* the **Yes** button to Continue to Certification. Selecting the **Yes** button displays the **School or Library Official Certification** page.





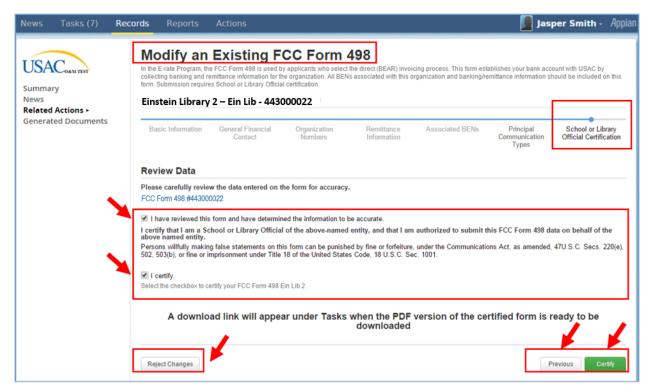
- 30. Review information displayed on the School or Library Official Certification page.
- 31. Click the FCC Form 498 # link to display the modified form.







32. *Review* the modified form for accuracy, and then close the form to return to the **School or Library Official Certification** page.



33. Select both check boxes in the Review Data section, if acceptable.

Note: Both check boxes must be selected to continue the certification process.



- 34. *Select* from the following options:
 - d. *Click* the **Reject Changes** button to discontinue the Modify an Existing FCC Form 498 process and discard the updated information entered.
 - e. Click the Previous button to return to the Principal Communication Types page.
 - f. *Click* the **Certify** button to complete the **Modify an Existing Form 498** process. Selecting this option displays the **Tasks** tab.

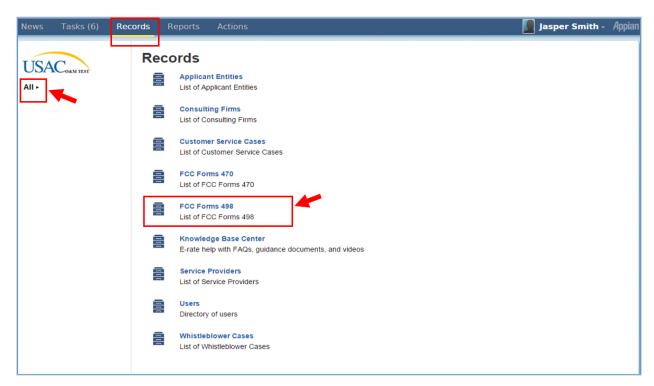
Note: If the **Certify** button is selected, a download link will appear under the **Tasks** tab when the PDF version of the certified form is ready to be downloaded.

35. See <u>View Form</u> section to view the user's tasks categorized by **Assigned to Me**, **Status** and **Deadline**.

Note: You can download the modified FCC Form 498 by following the steps in the View Form section.

Deactivate FCC Form 498

The information in the FCC Form 498 document can be deactivated. The **Records** tab will display your records and the status of each record.



1. *Click* the **drop-down** arrow next to the **ALL** topic OR *click* the **FCC Forms 498** link. The three Status options and records displays.





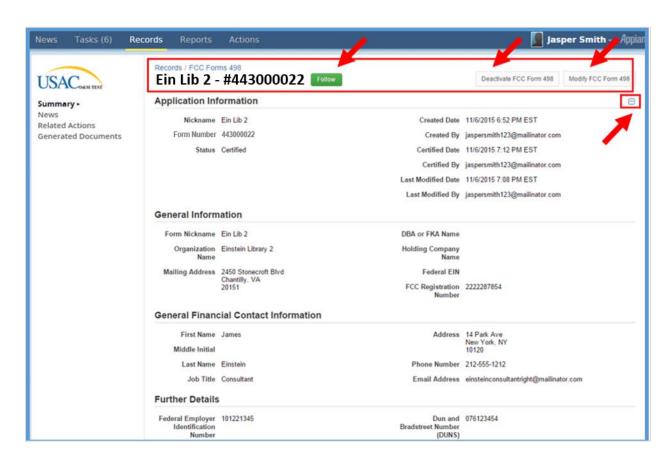
The **Nickname** and **Form Number** assigned to the form will display under the Forms 498 topic.



2. Click the Nickname (Example: Ein Lib 2 – 443000022) link. The form information displays.

Note: The Search field can also be used to retrieve records when multiple records exist.





Note: A **Follow** button displays. *Select* the **Follow** button to view news related to this record in your news feed (Optional).

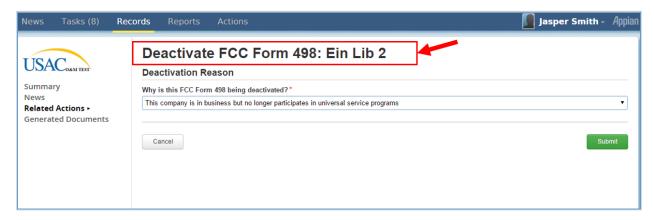
3. Click the Collapse (-)/Expand (+) button to adjust the view.

Note: Do not select the **Modify FCC Form 498** button to modify the form if you are deactivating this form.

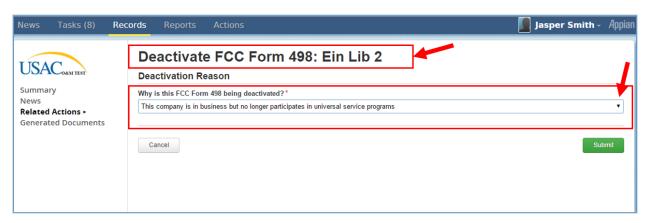
4. *Click* the **Deactivate FCC Form 498** button to disable the form. The **Deactivate FCC Form 498**: (Nickname) page displays.



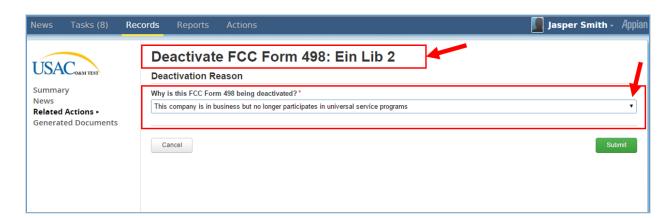




5. *Click* the **drop-down** arrow to select the **Deactivation Reason**. The selected Deactivation Reason displays.



--- Select a Reason --This company is going out of business
This company is in business but no longer participates in universal service programs
This company is being sold
This company has merged with another company
This company has consolidated with another company



6. Select from the following options:



- a. *Click* the **Cancel** button to discontinue the Deactivation process and keep the form in its current status.
- b. Click the Submit button to deactivate the form. The form displays a Deactivated status.

