

Contributor Office Hours

Accessing E-File

March 7, 2024



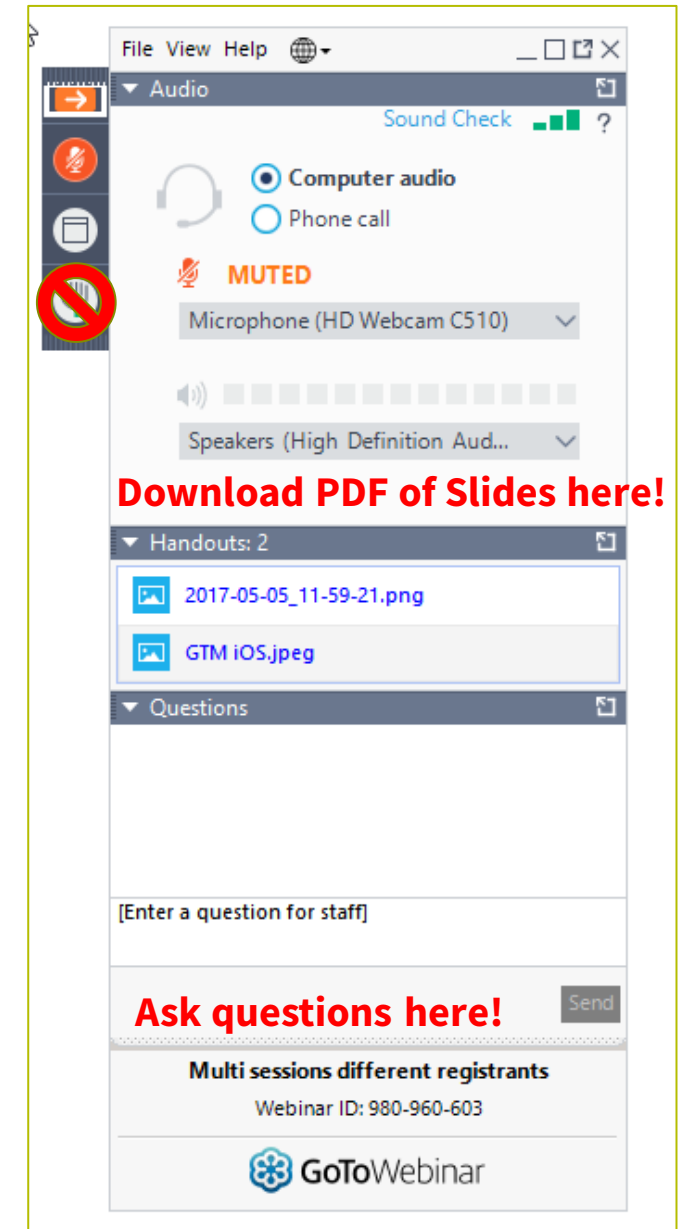
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DISCLAIMER

To accommodate all attendees, real-time closed captions will be present during this presentation. We apologize in advance for any transcription errors or distractions. Thank you for your support.

Housekeeping

- The audience will remain on mute.
- Enter questions at any time using the “**Questions**” box.
- A copy of the slide deck is in the “**Handouts**” section of webinar panel.
- This webinar is being recorded and a copy of the presentation will be on our website under Service Providers and “**Webinars**”.



Meet the Presenter

Amy Kavelman

Senior Telecom Industry Analyst | Contributor Operations

Ms Kavelman is a member of the 499 team that analyzes revenue reported on the FCC Form 499-A.

Amy also develops and delivers most of the 499 training. She has worked at USAC for 13 years.

Raised in central Illinois, she moved to the Washington DC area in 1997.

Agenda

- Introduction
- Webinar Format
- Accessing E-File
- Questions
- Assistance Resources

“Office Hours” Webinar Format

- Office Hours will be held monthly.
- Brief presentation of a common topic at the beginning
- Open the floor to questions from attendees
 - Attendees type their question in the ‘Questions’ box in the GoToWebinar panel
 - USAC staff will repeat the question so everyone can hear
 - USAC staff will answer the question, keeping identify of the asker private
 - If question contains specific company information, USAC staff will follow-up with an email, keeping the question private.

Accessing E-File

Before You Log In

- Firefox and Chrome work best. Safari does not.
- Don't log in on your phone.
- If you get repeated error messages, clear browser history, cache, shut down all tabs and restart the browser.
- Don't open E-File on two different monitors or browsers.
- Lower your browser's display percentage a bit. (80% - 90%)

E-File Users

- Your email address is also your E-File username.
- Only an authorized Company Officer in E-File can add users, USAC staff cannot.
- If your email address changes, a 'new' username must be added and then the old one deleted. USAC staff cannot make these changes.
- If all Company Officers have left, the company will need to add a new one. This removes all old Company Officers.

Temporary Access to E-File

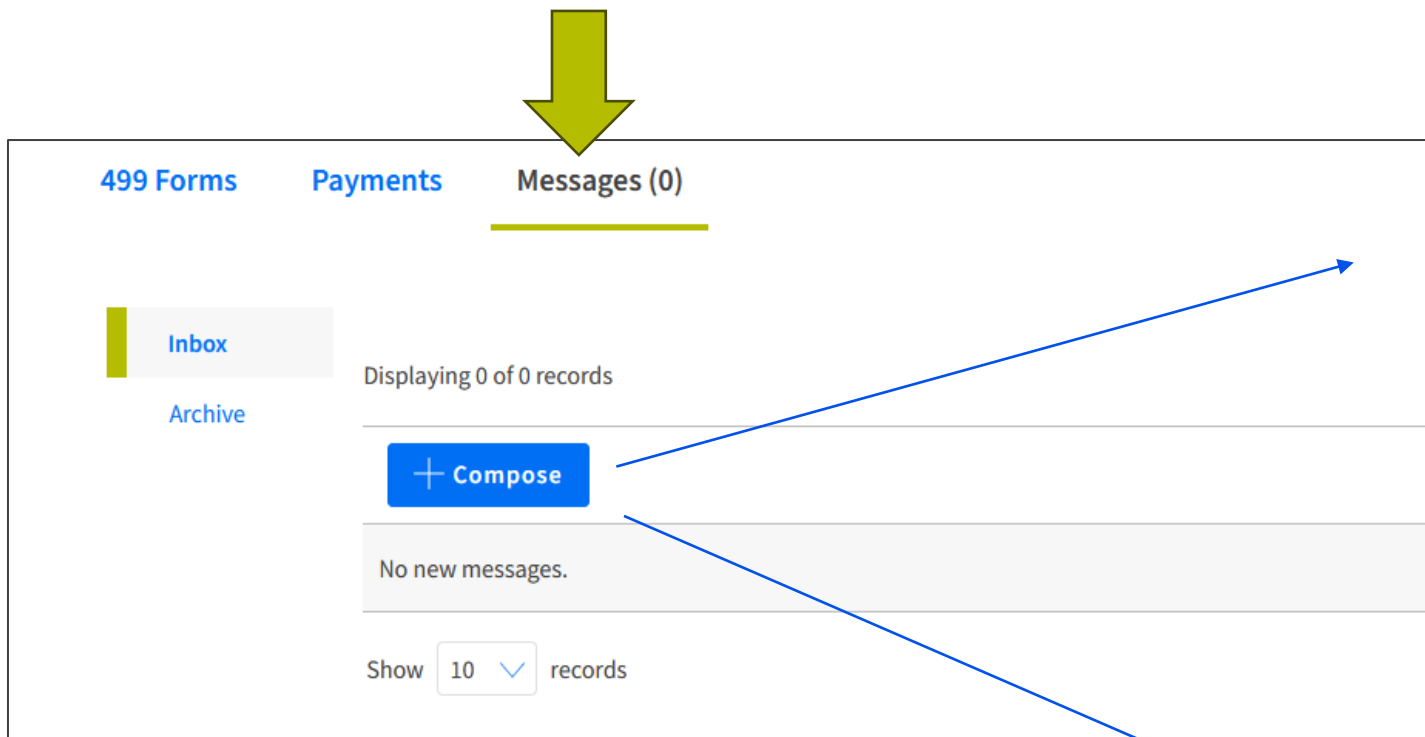
- Sometimes, a user might be asked to correct forms on an inactive 499 Filer ID. This requires temporary access in E-File.
- Only a company officer can request temporary access.
- The request for temporary access is all online. USAC staff do not activate without the company initiating the request.
- USAC online [training module](#) walks the viewer through step by step.

2023 E-File Enhancements

E-File Contributor Messages

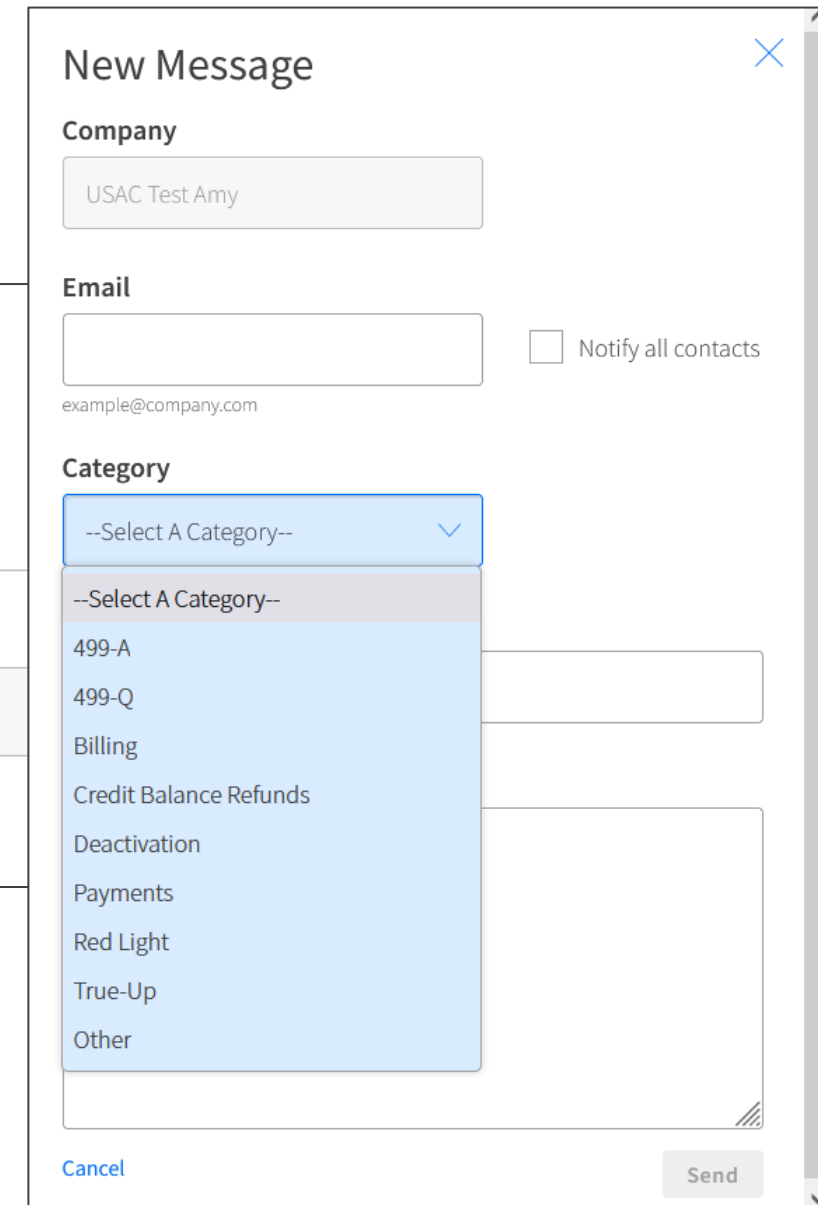
- This new feature provides:
 - A tool to communicate securely regarding revenue reporting on FCC Forms 499 while capturing and saving all of that correspondence in one secure location.
 - In so doing, communication that previously occurred using e-mail will be performed directly in E-File.
- The tool does not allow attachments. You'll need to email those to 'Form499@usac.org'.

E-File Message Portal



The screenshot shows the E-File Message Portal interface. At the top, there are three tabs: "499 Forms", "Payments", and "Messages (0)". A large yellow arrow points down to the "Messages (0)" tab, which is underlined. Below the tabs, there is a sidebar with "Inbox" and "Archive" options. The main area displays "Displaying 0 of 0 records" and a blue "+ Compose" button. Below the button, it says "No new messages." and "Show 10 records". Two blue arrows originate from the "+ Compose" button and point towards the "New Message" modal on the right. Another blue arrow points from the message list area towards the same modal.

Send a message to the Service Provider team directly through the new Message Portal in E-File.



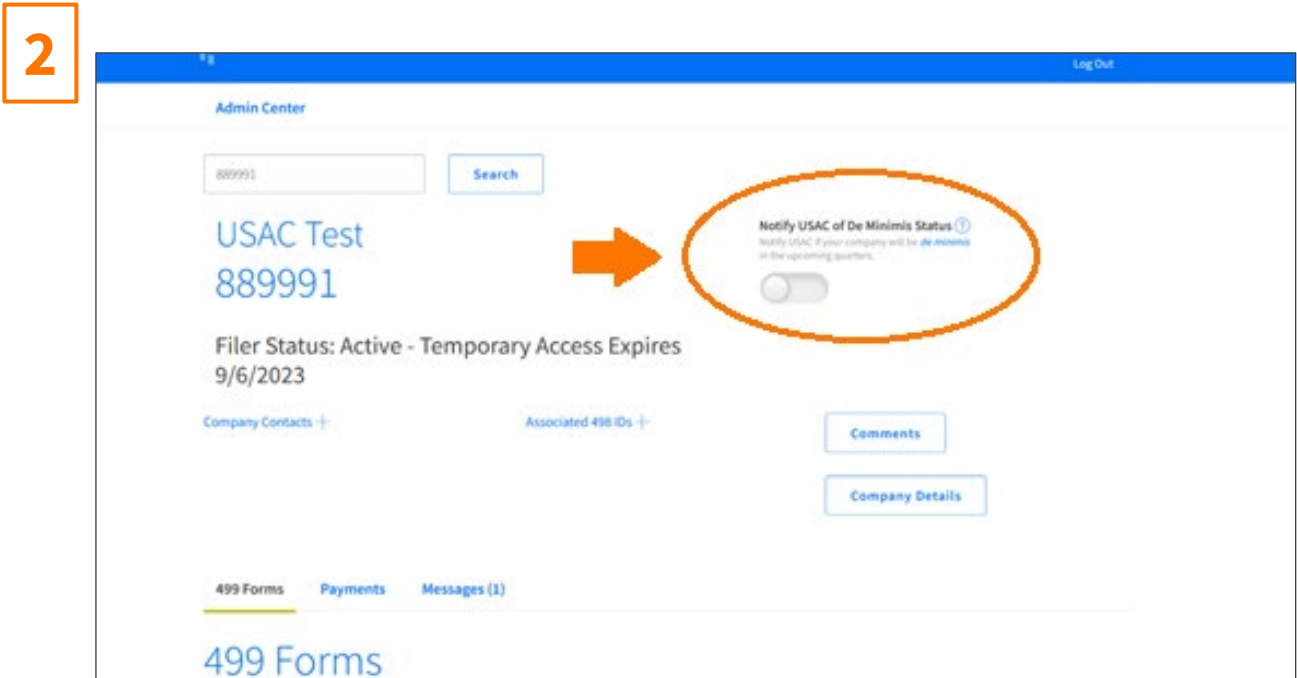
The "New Message" modal form is shown on the right. It includes a close button (X) in the top right corner. The form has the following fields and options:

- Company:** A text input field containing "USAC Test Amy".
- Email:** A text input field containing "example@company.com". To the right of this field is a checkbox labeled "Notify all contacts".
- Category:** A dropdown menu with a blue background. The selected option is "--Select A Category--". The dropdown list is open, showing the following options: "--Select A Category--", "499-A", "499-Q", "Billing", "Credit Balance Refunds", "Deactivation", "Payments", "Red Light", "True-Up", and "Other".
- Buttons:** "Cancel" and "Send" buttons at the bottom.

De Minimis Notification Button

- **Process:**

1. Sign into E-File.
2. Select the “Notify USAC of De Minimis Status” button.
3. Complete the confirmation popup.
(shown on next slide)
 - a) **Note:** USAC won’t receive any notifications until you click “Notify USAC” in the confirmation screen.



New Process: Confirmation Popups

3 – Standard Confirmation

- In most cases, your notification will apply to multiple upcoming quarters. The confirmation screen will list the affected quarters:

Quarters →

Notify USAC

You may notify USAC that your company expects to qualify for *de minimis* status for calendar year **2024** and that the company will not be filing the following FCC Form(s) 499-Q:

- February 2024 FCC Form 499-Q
- May 2024 FCC Form 499-Q
- August 2024 FCC Form 499-Q

Once you notify USAC of your company's expected *de minimis* status, USAC will generate *de minimis* estimates for the FCC Form(s) 499-Q listed above. Notifying USAC of your company's FCC Form(s) 499-Q *de minimis* status does not exclude you from filing the FCC Form(s) 499-Q within the 45-day filing window.

You may turn off the *de minimis* notifications at any time and file your future FCC Form(s) 499-Q.

To determine if your company qualifies for *de minimis* status or if you were billed for a prior FCC Form(s) 499-Q projecting revenues for calendar year year **2024**, please visit USAC's [De Minimis](#) webpage and [Appendix A](#) of the FCC Form 499-A Instructions.

Cancel Notify USAC

3 – Alternatives

- In rare cases you may receive an alternate popup. This popup will inform you of your next steps.

Form Already Filed

You have already filed the August [Year] FCC Form 499-Q. If you want to make changes, please file a revision.

OK

Form Already Generated

USAC has already generated estimates for the current calendar year FCC Forms 499-Q. If you wish to claim *de minimis* status for the August FCC form 499-Q, please file the form.

OK

Questions?

Additional Help

Training Videos

USAC has pre-recorded [videos](#) outlining steps for accessing E-File.

The screenshot shows the USAC website's 'Service Providers' section. The top navigation bar includes links for 'About', 'E-Rate', 'Rural Health Care', 'Lifeline', 'High Cost', and 'Service Providers' (which is highlighted with a blue underline). Below this, a breadcrumb trail reads 'USAC | Service Providers | Learn | Videos'. On the left, a 'Learn' sidebar contains links for 'Videos' (highlighted with a yellow bar), 'Webinars', 'Newsletter', and 'FAQs'. The main content area is titled 'Videos' and contains a paragraph: 'These videos are designed to help you understand and manage the form filing process, FCC requirements, and other elements to offer service provider support.' Below this paragraph is a table of video links.

Overview	FCC Form 498
Accessing E-File	FCC Form 499-A
499 Filer ID Basics	FCC Form 499-Q
E-File Navigation	

Customer Service Center (CSC)

Contributors/Service Providers



Call us at (888) 641-8722

Monday – Friday 9 a.m. to 5 p.m. ET



Email: CustomerSupport@usac.org

- Include in your email
 - 498 ID/Service Provider ID Number (SPIN)
 - 499 Filer ID

Weekly Webinars - Questions about the Annual Form

*** New * this year. Scheduled opportunities to ask questions about completing the 2024 FCC Form 499-A**

Friday, March 8 – **Annual Form Training: Registration Questions**

- Review of information found in Block 1 and Block 2.

Friday, March 15 – **Annual Form Training: Wholesale Revenue (Block 3)**

- Review of line numbers reporting revenue in Block 3.

Friday, March 22 - **Annual Form Training: End User Revenue (Block 4)**

- Review of line numbers reporting revenue in Block 3.

Friday, March 29 – **Annual Form Training: Regional Percentages and Certification**

- Review of information reported in Block 5.

All webinars are 2 p.m. – 3 p.m ET. [Register here](#).

Webinars will be recorded and posted on the same website where you register.



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