

E-rate Productivity Center: Administrative How-To Guide



- ✓ How to Log-In to One-Portal/EPC (slide 2)
- ✓ How to Reset your EPC Password (slide 6)
- ✓ How to Change Account Administrators (only AA can do) (slide 9)
- ✓ How to Create New EPC Users (only AA can do) (slide 16)
- ✓ How to Change User Permissions (only AA can do) (slide 24)
- ✓ How to Remove User from Your EPC Account (slide 26)
- ✓ How to Remove Consultant User from Your EPC Account (slide 30)

Created by Julie Tritt Schell
PA E-rate Coordinator
for the Pennsylvania Department of Education
April 2023

How to Log into One Portal

For instructions on how to set up your One Portal Account, see One Portal/MFA Set Up Guide

Logging in to One Portal (1P)



Subscribe Payment

Sign In



About

E-rate

Rural Health Care

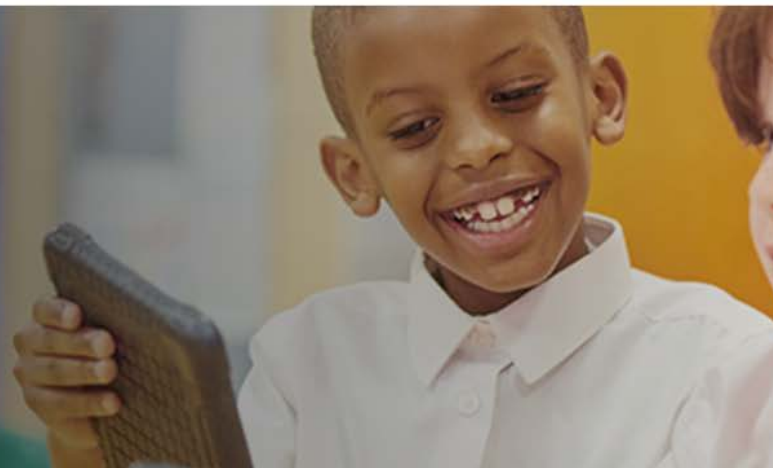
Lifeline

High Cost

Service Providers

E-rate

Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet



Intro Screen

- This screen will appear each time you log in to One Portal.
- Click **Continue**:

EPC users and BEAR Form filers: If this is your first time logging in to One Portal, please read this information carefully.

USAC has added multifactor authentication (MFA) to increase the security of our Universal Service Fund (USF) IT applications. The first time you sign into an application, the system will prompt you to set up MFA for your account. To do this:

1. Click the blue **Continue** button below.
2. Click the **Forgot Password** link.
3. Enter your Username (your email address) and click **Reset via Email**.
4. When you receive the email, click the link to create a password. Your password must be at least eight characters long and include one lowercase letter, one uppercase letter, one number, and one special character.
5. Accept the system's terms of use and click **Sign In**.
6. On the next page, confirm the email associated with your account and click **Send Email**.
7. Check your email for a verification code.
8. Enter the code and click **Verify**.

After logging in, you will see USAC's new single portal application dashboard if you have access to more than one application. On this page you can access all of the USF applications associated with your log in. This means users no longer have to sign into multiple applications to interact with different USF programs.

From the dashboard, you can visit the "Settings" page to add a cell phone number to your account. This will allow you to receive verification codes via either email or text message when you log in in the future.

To learn more about USAC's MFA and to find a list of all USF IT applications included in the single portal, visit [USAC's website](#). If you cannot access the email associated with your account and need to set up a new log in, please contact your organization's USF administrator. If you need to reset your password, click the "forgot password" link. More detailed instructions are available in [this video](#).

Continue

Dashboard: You're In!



Sign Out

jtschell@comcast.net ▾

Dashboard

Dashboard will show systems for which you have access:

- To enter **EPC**, click **here**:
- To enter the **BEAR** system, click **here**:
- To enter the **ECF** system, click **here**:

E-rate Productivity Center (EPC) - E-rate Program participants use the E-rate Productivity Center to manage program processes, receive notifications and to contact customer service.

FCC Form 472 (BEAR) - Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount amount of the eligible products or services that the applicant has received and paid for in full.

Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form 474 (SPI) to request ECF reimbursement.

Help?

Send us a message
[Click here](#)

Call us
(888) 641-8722

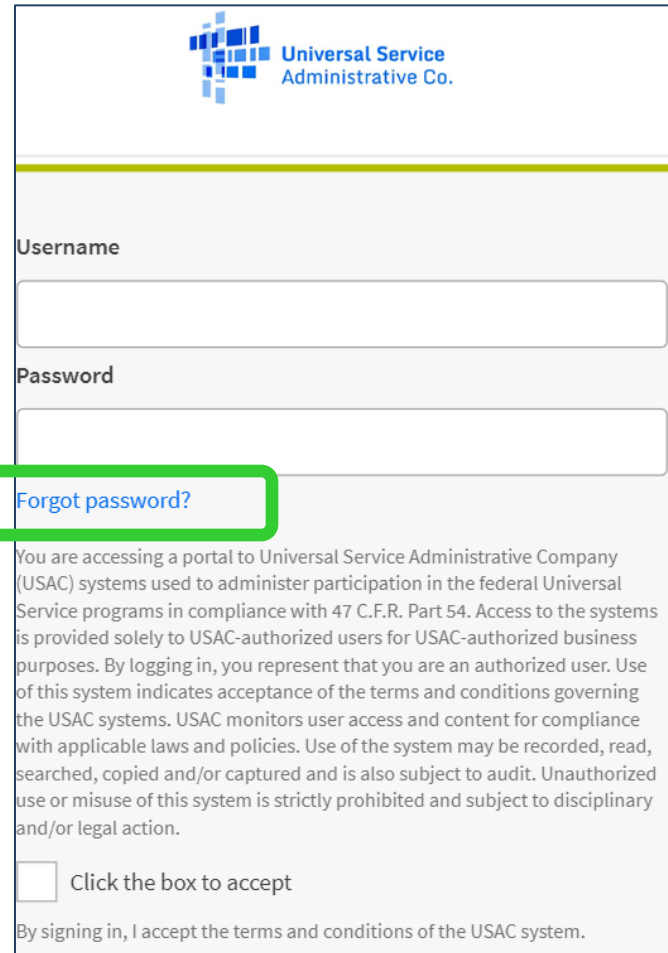
How to Set or Reset One Portal Password

Can't Remember Your Password?

Passwords are only valid for 60 days.

Click **Forgot Password** –
The system will e-mail you a temporary link to reset your password.

If no e-mail is received, it means that you are not yet set up in One Portal and must contact USAC at 888-203-8100 for assistance.



Universal Service Administrative Co.

Username

Password

[Forgot password?](#)

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be 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.

Click the box to accept

By signing in, I accept the terms and conditions of the USAC system.

How to Set or Reset EPC Password

- Passwords must meet all of the following criteria:
 - Contains at least 8 characters
 - Has not been used in the previous 4 passwords
 - Contains at least 1 character of the English alphabet
 - Contains at least 1 number (0-9)
 - Contains at least 1 non-alphabetic character (such as !, &, #, %)
 - Contains at least 1 uppercase character (A – Z)
 - Contains at least 1 lowercase character (a - z)

How to Change EPC Account Administrators

Basics:

- The AA must be school or library employee (not consultants)
- There is only one AA per organization
- AAs first must be set up as “Users” in EPC
- Only AAs or USAC can transfer their AA status to another User

Next Steps:

There are specific steps to updating an organization’s AA, depending on the situation. Select the appropriate situation from the next few slides to see the required steps for updating the AA.

How to Change Account Administrators

Situation A

The *previous* AA is still at the school or library (or if you can still ask them to do it even though they no longer work there),

and...

The *new* AA is already a User in EPC

Instructions:

1. The current AA logs into their EPC account
2. Selects > Name of Entity on Landing Page > Related Actions > Modify Account Administrator and selects the User that should be the new AA

How to Change Account Administrators

Situation A

Step 1:
Click on
Entity
Name



Records / Applicant Entities

#108 - PAS BEST SCHOOL DISTRICT - (PARENT ENTITY)

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

Step 3:
Select Modify
Account
Administrator

- Create a New User**
This function allows you to create a user for your entity.
- Add or Remove Existing Users**
This process allows user to add and remove users from an organization
- Manage User Permissions**
This function allows you manage the permissions for one or more users.
- Manage Organization**
This function allows you to update information about an entity or BEN.
- Modify Account Administrator**
This process allows you to transfer the Account Administrator function to another individual.

Step 2:
Select
Related
Actions

How to Change Account Administrators

Situation B

The previous AA is still at the school or library (or is no longer there but they are willing to access their EPC account to help perform these tasks),
and...

The new AA is not already a User in EPC

Instructions:

1. The current AA logs into their EPC account
2. Selects > Name of Entity on Landing Page > Related Actions > Create New User and enters the new user's information (including giving them Full Rights to all the forms)
3. The EPC system will then send an automated e-mail to the New User asking them to log-in to EPC, establish their password (by clicking "Forgot Password"), and accept their EPC Terms and Conditions in EPC
Note: This is different than the log-in Ts & Cs
4. After the New User has logged into EPC and accepted their Ts & Cs, the New User will appear in EPC as a user for that entity
5. Current AA can then select > Related Actions > Modify Account Administrator and selects the New User that should be the new AA

How to Change Account Administrators

Situation B

Step 1:
Click on
Entity
Name



Records / Applicant Entities

#108 - PAS BEST SCHOOL DISTRICT - (PARENT ENTITY)

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

Step 3: Select Create a New User. The new User will receive an e-mail with steps to follow. After User logs in/accepts their Ts/Cs, the AA can select 'Modify AA'

- Create a New User**
This function allows you to create a user for your entity.
- Add or Remove Existing Users**
This process allows user to add and remove users from an organization
- Manage User Permissions**
This function allows you manage the permissions for one or more users.
- Manage Organization**
This function allows you to update information about an entity or BEN.
- Modify Account Administrator**
This process allows you to transfer the Account Administrator function to another individual.

Step 2:
Select
Related
Actions

How to Change Account Administrators

Situation C

The current AA is no longer at the school or library and no one has access to their EPC account

Instructions:

1. New AA must contact USAC's Customer Support Center (CSC) for assistance at **888-203-8100**
2. CSC will ask New AA for contact information and will have the New AA send the CSC rep the following information from their school or library's e-mail account:

"I am writing to ask to be set up as the new Account Administrator in our EPC Portal. The previous AA has left the organization."

- Name:
- Title:
- Billed Entity Number (BEN):
- Organization:
- Address:
- Phone:
- E-mail:

How to Change Account Administrators

3. USAC will then establish the New AA as a “User” in the entity’s EPC portal
4. The EPC system will send an e-mail with a link to log into their EPC account
 - *The log-in page will require the New AA to set up their EPC password which is done by clicking on the “Forgot Password” link*
5. Please note that the Terms/Conditions that must be accepted in the portal are not the same as accepting the password terms/conditions.
6. After logging in to EPC, the New AA will accept the Terms and Conditions
 - *Note: These T/Cs are different than the password T/Cs*
7. The new AA will contact CSB again to let them know this has been done and ask CSC to designate them as the official Account Administrator

How to Create a New EPC User

Basics:

- Only AAs can create EPC Users for their organization (BEN)
- There can be multiple Users in an organization
- Every User must have a distinct EPC ID (e-mail address)
- If a person is a User in more than one organization (BEN), they must have a different e-mail address for each organization
- Only AAs can assign User Rights

How to Create a New EPC User

Instructions:

1. The AA logs into their EPC account
2. Selects > Name of Entity on Landing Page > Related Actions > Create New User and enters the new user's information (including giving them Full Rights to all the forms)
3. The EPC system will then send an automated e-mail to the New User asking them to log-in to EPC, establish their password (by clicking "Forgot Password"), and accept their EPC Terms and Conditions in EPC
 - Note: This is different than the log-in Ts & Cs
4. After the New User clicks on the link in the e-mail, they only have 15 minutes to set up their One Portal account.
5. After the New User has logged into One Portal, is in EPC and accepted their Ts & Cs, the New User will appear in EPC as a user for that entity

How to Create a New EPC User

Step 1:
Click on
Entity
Name



Records / Applicant Entities

#108 - PAS BEST SCHOOL DISTRICT - (PARENT ENTITY)

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

Step 3: Select Create
a New User.

- Create a New User**
This function allows you to create a user for your entity.
- Add or Remove Existing Users**
This process allows user to add and remove users from an organization
- Manage User Permissions**
This function allows you manage the permissions for one or more users.
- Manage Organization**
This function allows you to update information about an entity or BEN.
- Modify Account Administrator**
This process allows you to transfer the Account Administrator function to another individual.

↑
Step 2:
Select
Related
Actions

How to Create a New EPC User

- AA will complete the information form for the New User

Create A User for CENTRAL DAUPHIN SCHOOL DIST

User Details

User Type
Applicant

First Name *

Job Title *

Last Name *

Phone Number *

Middle Initial

Phone Extension

Email

Email *

Confirm Email *

will be used as the username for the new account

Address

Address Line 1 *

County

Address Line 2

Zip Code *

City *

Zip Code Extension

State *

PA

How to Create a New EPC User

- AA will assign the New User their EPC Permissions
 - Full: can enter data and submit forms – use this one
 - Partial: can enter data, but can't submit forms
 - View only: can only look at forms

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.

Apply All	470 Permission	471 Permission	498 Permission	FRN Mod Permission	486 Permission	Appeals Permission
Full	Full	Full	School or Library Official	Full	Full	Full

How to Create New EPC User

Newly created user will receive an e-mail from USAC that looks like this:

From: portal@usac.org <portal@usac.org> On Behalf Of EPC Application Administrator
Sent: Tuesday, September 4, 2018 3:03 PM
To: [XXXXXXXXXX](#)
Subject: USAC EPC - Account Creation



Hello,

Your USAC E-rate Productivity Center (EPC) account has been created with the username: [XXXXXXXXXX](#). To log in with your new username, navigate to <https://portal.usac.org/suite/tempo>, and then select the Forgot Password option and follow the directions. You will also receive a separate email shortly from USAC called, "New Task: Complete Terms and Conditions." This email is a reminder that you must first accept USAC's Terms and Conditions before you can get access to the features within EPC.

If you have any questions about your account, please contact USAC's Client Service Bureau at (888) 203-8100.
Thank you,

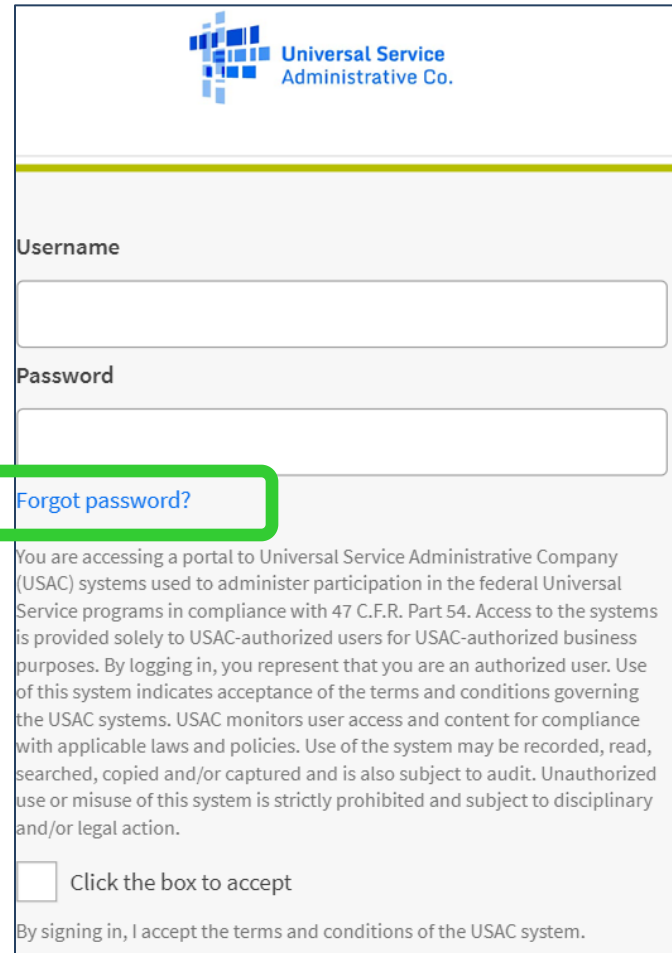
Universal Service Administrative Co.

They must click on this link, create their EPC password, then log into EPC and accept their Terms and Conditions

Establishing New User's Password

Don't enter Username or Password.

Click **Forgot Password** –
The system will e-mail you a temporary link to reset your password.



Universal Service
Administrative Co.

Username

Password

[Forgot password?](#)

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be 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.

Click the box to accept

By signing in, I accept the terms and conditions of the USAC system.

How to Create a New EPC User

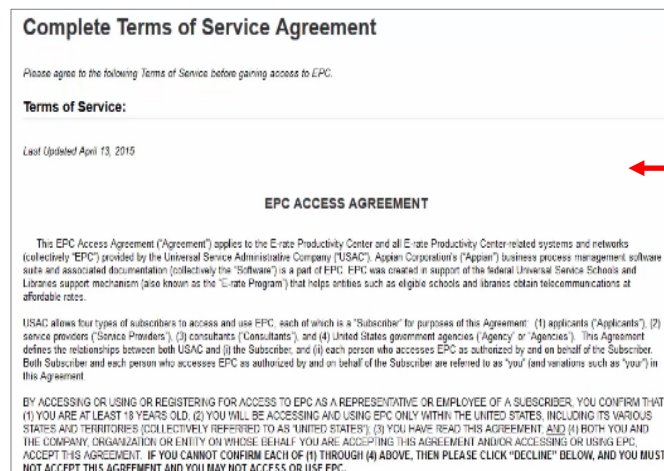
- After creating their password, new EPC users will log into EPC, and then must accept the Terms and Conditions which is found under Tasks:



← Step 1: Click 'Tasks' on the top toolbar



← Step 2: Click "Complete Terms and Conditions"



← Step 3: Scroll to the bottom of the Agreement and click "Agree"

How to Change Users' Permissions

How to Change Users' Permissions

- Only the AA can perform this task

Records / Applicant Entities

#125729 - CENTRAL DAUPHIN SCHOOL DIST Follow



Create a New User

This function allows you to create a user for your entity.



Add or Remove Existing Users

This process allows user to add and remove users from an organization



Manage User Permissions

This function allows you manage the permissions for one or more users.



Manage Organization

This function allows you to update information about an entity or BEN.

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.

Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
School District 4 User 1	school.district4.user1@mailinator.com	▼	Full ▼	Full ▼	Full ▼	School or Library Official ▼	Full ▼	Full ▼	Full ▼

CANCEL

SUBMIT

How to Remove a User from Entity's EPC Account

How to Remove User from EPC Account

- Only the AA can perform this task
- Select “Records” from toolbar at top of EPC Landing Page. Then “Users”

The screenshot shows the EPC Landing Page interface. At the top, there is a blue navigation bar with the following tabs: News, Tasks (7), Records, Reports, and Actions. The 'Records' tab is highlighted with a red box, and a red arrow points to it from the text above. To the right of the navigation bar is a user profile icon and the text 'app'. Below the navigation bar is a search bar with the placeholder text 'Search record types...' and a 'SEARCH' button. The main content area displays a grid of record types, each with a blue folder icon, a title, and a brief description. The 'Users' record type is highlighted with a red box, and a red arrow points to it from the text above. The 'Users' record type is titled 'Users' and has the description 'Directory of users'.

News Tasks (7) **Records** Reports Actions

Search record types... SEARCH

Appeals
List of Appeals

Applicant Entities
List of Applicant Entities

COMAD Outreach
List of available organizations for COMA...

Consulting Firms
List of Consulting Firms

Customer Service Cases
List of Customer Service Cases

FCC Forms 470
List of FCC Forms 470

FCC Forms 471
List of FCC Forms 471

FCC Forms 486
List of FCC Forms 486

FCC Forms 498
List of FCC Forms 498

FCC Forms 500
List of FCC Forms 500

FRN Cases
Cases created for Committed Funding Re...

Funding Requests
A list of all Funding Request Numbers (FR...

Knowledge Base Center
E-rate help with FAQs, guidance docume...

Legacy FCC Forms 500
List of FCC Form 500s from Legacy System

Service Providers
List of Service Providers

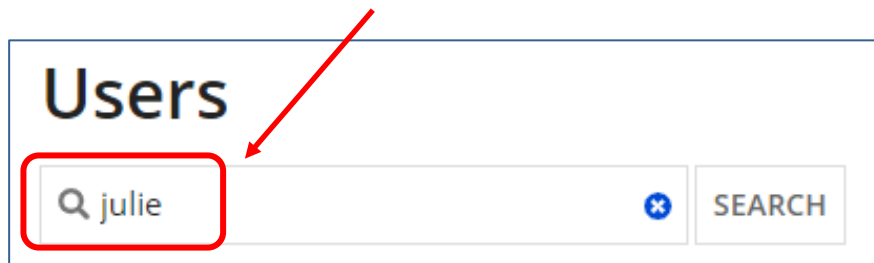
Service Substitutions
List of Service substitution requests

SPIN Changes
List of SPIN change requests.

Users
Directory of users

How to Remove User from EPC Account

- Type in first or last name of EPC User, then Search



Users

Q julie

SEARCH

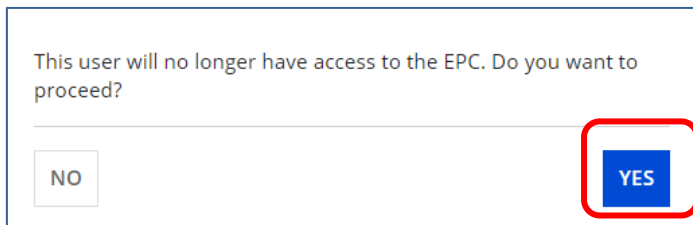
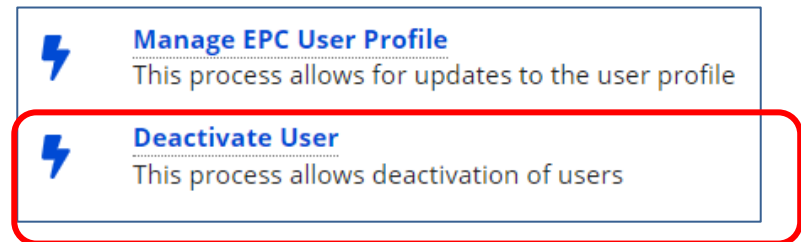
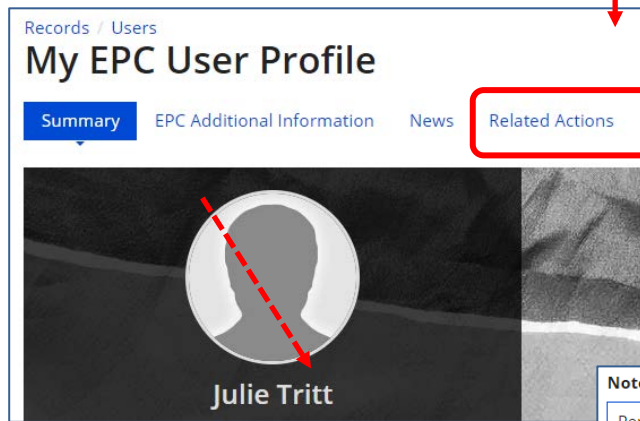
- Then click on the User's Name that you wish to remove



Name	↑	Email Address
Julie Schell		il_user_10070@mailinator.com
Julie Tritt		jtschell@comcast.net

How to Remove User from EPC Account

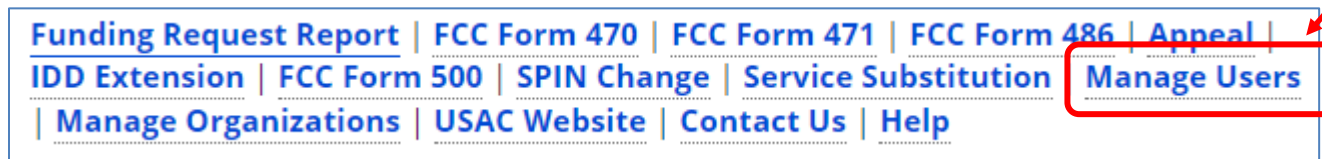
- Next, you will see the User's Profile screen. Select **“Related Actions”**, then **“Deactivate User”**
- Then enter a sentence that explains why that they should be removed, and click Submit



How to Remove a Consultant User from Your EPC Account

How to Remove Consultant User

- Only the AA can perform this task
- Select “**Manage Users**” from EPC Landing Page (shortcuts), select name of the organization, then “**Add and Remove Existing Users**”



The 'Manage Users' page has a section titled 'Existing Organizations' containing a table. A red box highlights the checkbox for the first organization, 'THE BEST SCHOOL DISTRICT - (PARENT ENTITY)'. A red arrow points from the top-left to this checkbox. At the bottom of the page, three buttons are visible: 'CANCEL', 'CREATE A NEW USER', and 'ADD AND REMOVE EXISTING USERS'. The 'ADD AND REMOVE EXISTING USERS' button is highlighted with a red box and a red arrow points to it from the right. Below it is a 'MANAGE USER PERMISSIONS' button.

<input checked="" type="checkbox"/>	Billed Entity Name	City	State
<input checked="" type="checkbox"/>	THE BEST SCHOOL DISTRICT - (PARENT ENTITY)	Springfield	PA

How to Remove Consultant User

- Click **X** in last column to remove Consultant User

Consultant Permissions

Name	Email	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission	Active	Click X to Remove
John Smith	johnsmith414@yahoo.com	Full	Full	Full	No Access	Full	Full	Full	Yes	X

Questions?

Contact USAC's Customer Service Center (CSC) at 888-203-8100 for assistance

