

## Special EPC Portal Issues for Pennsylvania's Consortia/IUs

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This informal reference document is designed to assist Pennsylvania's IUs and other consortia with the nuances associated with establishing E-rate EPC Portals for their organizations.

### 1) NEW, SEPARATE "CONSORTIA" BENS REQUIRED IF YOU FILE AS A CONSORTIUM

If you apply for E-rate discounts as a district (services just used by your organization), AND you apply as a consortium (services that also are delivered to other entities), you must obtain a separate Billed Entity Number for your consortium applications. In previous years, you could use the same BEN for both your own services and your consortium application. In the new portal, you cannot use the same BEN to file as a district and consortium. When the original EPC accounts were created, most IU BENS were set up as districts. As of 9/23/2015, only these PA consortium have EPC accounts:

<b>BEN</b>	<b>Consortia Name</b>
232427	EINetwork
16044217	PAIUnet
16061287	Eastern Consortium
146681	Montgomery County Library and Information Network Consortium
17000227	Carbon Lehigh Intermediate Unit #21 Consortium
17000234	Intermediate Unit 29
17000344	Lincoln Intermediate Unit 12 - LLN
17000469	Berks County Intermediate Unit
17000531	Bucks County IU RWAN Consortium
17000529	Intermediate Unit 18 & 19 RWAN Consortium
17000532	Allegheny IU RWAN Consortium
17000142	Aspira Philadelphia
17000533	Delaware County IU RWAN Consortium

To obtain a consortium BEN, call CSB at 888-203-8100. I would call it [Name of IU][IU #] - RWAN Consortium so districts will know what to look for. For example, "Beaver Valley IU 27 RWAN Consortium". USAC will send you a message saying they have created your EPC account on the backend and you must establish your password by going to: <https://portal.usac.org/suite>. After you've done this, you must then call USAC back and tell them to identify you as the Account Administrator for the EPC Consortium. Yes, it is a redundant (required) process. When you call them to set up your new entity number, ask them to include your FCC registration number in the set up. This will save you time later. You can obtain this number from your FY 2015 Form 471 application in the basic information section. Also, when you ask them to set up the consortium, be explicit and tell them you are an ESA consortium -- NOT a statewide consortium. Again this will save you time later.

In addition, many BENS were established as NIFs, which isn't permitted in EPC. NIFs are for "administrative buildings" not administrative entities (billed entities). You'll want to check with CSB to make sure that your BEN is not considered a NIF.

### 2) UNIQUE E-MAILS REQUIRED FOR EACH BEN

An individual user is identified in an EPC account by a specific email address. If an individual is associated with two or more applicant accounts, such as an IU and an IU Consortium, that individual must have different email addresses for each. Therefore, if an IU employee works on both the IU's own

application and the IU RWAN application, they will be listed in both portals and must have two separate e-mail addresses. You will need to have the new email address set up before you call CSB to ask them to establish the new entity number for the consortium.

The system will allow you to use a generic e-mail address (such as [e-rate@iu30.org](mailto:e-rate@iu30.org)), but that e-mail must be for a single person – not for several people within your organization – and USAC will periodically ask you to confirm that the person associated with that generic e-mail address has not changed.

#### **9) ADDING CONSORTIA MEMBERS TO YOUR EPC PORTAL**

Once your consortium entity number is set up, then you must add each district/school to the consortium. To do this, follow these steps from your landing page (click on the USAC logo to return to your landing page). Select your entity name>select Related Actions>Manage Organization Relationships>Add Consortium Member.

Once you are in the Add Consortium page, I recommend you search by district and state and you will receive approx. 629 results that are arranged alphabetically. Select each of your consortium district members and then select submit. Then go back and add any individual school or library members (such as CTCs or nonpublic schools) using a similar process.

Note that if you search by entity number or name, and select each district member individually to be linked to your consortium, after you click on the submit button you will then have to “start over” with Related Entities>Manage Organizations>Add Consortium Member.

If you cannot find a particular school, such as a CTC or nonpublic school, it is likely because USAC has inaccurately associated them as part of a school district. You will have to contact USAC to have these schools recognized as “stand alone entities” so they will then show up on the list of entities that you can add to your consortia.

#### **4) E-RATE CONSULTING EPC PORTAL REQUIRED**

If you are consulting for your districts - whether you charge a fee or provide this service with a separate charge, you must establish an EPC Consultant Portal. This is the only way you will be able to easily access each district’s separate EPC portal. I know this is a change from prior years -- which only required a CRN if you charged a fee for consulting. If you already had an E-rate Consultant Registration Number (CRN), an EPC Consultant Portal may already have been created for you. However, you must use another separate e-mail address for the consultant portion. After your EPC Consultant Portal has been created, each of the districts that you’re consulting for must designate you as their consultant in their own EPC portal. There is no way for consultants to identify districts in their Consultant Portal -- districts must opt-in. Therefore it's important for you to make sure your districts have their EPC accounts set up, and identify your IU as their consultant. Instructions to add a consultant can be found at: <http://e-ratepa.org/?p=8451>.

Even if you're not an official E-rate consultant for your districts, if you ever help your applicants by going into see their applications before they're submitted, you should get an E-rate Consultant Registration Number (CRN), set up your consultant EPC account, and have your districts list you as their consultant (or one of them) so that way you will be able to have access to view/modify their application (depending on the permissions given to you).

**\* OTHER RELATED ISSUES\***

**5) ACCOUNT ADMINISTRATORS CAN ONLY SET UP PORTALS**

Much of the information required to set up an applicant portal — including the list of people authorized to access the portal "users", entity and NSLP information, joining consortia, etc. — can only be provided and maintained by the Account's Administrator, who cannot be a consultant. USAC has agreed to change the settings to allow Full Rights Users to perform these tasks (including consultants if they have Full Rights given to them by the AA), but that functionality won't be available until at least late October.

**6) ENCOURAGE MEMBER DISTRICTS TO SET UP EPC PORTALS NOW**

Every applicant will be required to have an EPC Portal established, but as of today, we have no way of seeing which PA applicants have one. Please encourage your districts to set up their EPC passwords and accounts as soon as they can so they can file a Form 470 in the next few months. We can't have districts doing this starting in January!

**7) CONSORTIA MEMBERS THAT DON'T FILE 471S MUST HAVE AN EPC ACCOUNT**

Even if an entity is ONLY listed on a consortium application and doesn't apply for E-rate on their own 471, they must have an EPC Portal in order to be included in your consortium application.

**8) ENROLLMENT/NSLP DATA PORTED FROM FY2015 FORM 471**

All of the district buildings, enrollment and NSLP data have been ported over from their FY 2015 Form 471 (this would have been October 2014 data). The new FY 2016 Form 471 is supposed to ONLY pull this data from district EPC Portals, with no way for consortia applicants to populate their own 471s with this data. The only Block 4-related functions the consortium will perform will be to identify members of their consortium -- nothing else. Districts will have the option of using the data included on their FY 2015 Block 4's or they can update this data with the enrollment/NSLP data that is submitted to PDE in October 2015.

**9) VERIFY THAT ALL IU BUILDINGS ARE INCLUDED IN YOUR 'DISTRICT' PORTAL**

Each IU that has its own buildings that are listed on its own services "district" application should verify that all of these buildings are listed in your portal as being part of your organization. If there are buildings missing, you will need to request them to be added to your portal.