E-rate Productivity Center (EPC)

The E-rate Productivity Center (EPC) is the new account and application management portal for the Schools and Libraries (E-rate) Program that was introduced beginning in FY 2016. Applicants, consultants, and service providers participating in the E-rate Program must use this tool to submit forms, manage program processes and to submit questions.

Instead of creating online forms directly from the SLD home page, E-rate applicants must log into their EPC portals and create their forms from within each applicant portal.

The Form 470, Form 471, Form 486 and Form 498 are submitted within each applicant's the EPC portal, but the FY 2015 and FY 2016 Form 472 BEAR Reimbursement Forms will be submitted in the legacy system (Apply Online), not in EPC. The Form 500 is currently submitted via paper but the EPC functionality for this form is expected to be available in the coming months.

Each applicant's portal is managed by their Account Administrator (AA). Once the AA has logged in, that person may create new users, and/or assign the account administration responsibility to someone else.

If you are not sure whether your organization's EPC portal has been set up, contact the Client Service Bureau at 888-203-8100 to ask. The following documents in this training manual contain the specific instructions for how to set up your EPC portal, including the following tasks:

- How to Log-In to EPC
- How to Reset your EPC Password
- How to Change Account Administrators (only AA can do)
- How to Establish Users and Give/Change Permissions (only AA can do)
- How to Join Consortia
- How to Add a Consulting Firm (only AA can do)
- How to Update Building Entity Data
- How to Update Connectivity Survey
- See Tab 11: How to Create a Contract Record in the EPC Contract Module



E-rate Program Applicant Training

EPC Fundamentals

September – November 2016

Washington DC • Orlando • Houston • Philadelphia • Minneapolis • St. Louis • Seattle • Los Angeles

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Overview

Overview

- What is EPC?
- What do I need to begin using EPC?
- How do I log in for the first time?
- How do I navigate to and complete the actions I want to take?
- Where can I go for help?



Getting Started

What is EPC?

- EPC is the E-rate Productivity Center the main point of contact for applicants with the E-rate Program
 - Complete and certify program forms including FCC Forms 498, 470, 471 and 486
 - Obtain the status of applications and requests
 - Submit appeals and post-commitment change requests (e.g., SPIN changes and service substitutions COMING SOON)
 - Receive timely reminders and notifications
 - Respond to PIA questions
 - Ask USAC questions

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Getting Started

What do I need to begin using EPC?

- Organization account
 - Independent school
 - Independent library
 - School district
 - Library system
 - Consortium

NOTE: There are also accounts for service providers and for consultants.

Account administrator



Getting Started

What do I need to begin using EPC?

Organization account

- Your organization account contains information about your organization and any related organizations.
- The information for each organization is located in its profile.
 - Profiles for individual schools are managed through the school district profile.
 - Profiles for library branches are managed through the library system profile.
 - Consortium members manage their own profiles, and the members are listed in the consortium profile.

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Getting Started

What do I need to begin using EPC?

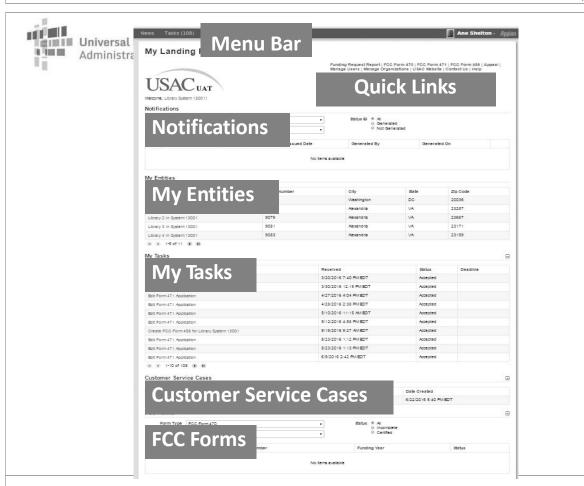
- Account administrator
 - The account administrator can:
 - Create other users on the organization account.
 - Assign user rights (permissions) to those users.
 - Full rights view, complete, and certify program forms, update profile information.
 - Partial rights view and complete program forms, update profile information.
 - View-only rights view program forms and profile information.
 - Update his or her own rights.



How do I log in for the first time?

- First, USAC sets up accounts for the following (if they do not already exist):
 - The organization.
 - The individual schools or library branches that belong to the organization, if any.
 - The account administrator.
- The account administrator must go to portal.usac.org, create a password, log in to EPC, and accept the terms and conditions of EPC use before he or she can take any actions.
- Account users created by the account administrator must go through the same process (create, log in, accept).

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My Landing Page - Navigation

News Tasks (108) Records Reports Actions

Menu Bar

- The News tab contains your "letters," other notifications from USAC (e.g. FCDL), and information on program activities for example, if someone certifies a form.
- The Tasks tab includes actions for someone in your organization to do, such as respond to PIA requests.
- The Records tab features lists of related groups, such as applicants, service providers, and program forms.

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Navigation

News Tasks (108) Records Reports Actions

Menu Bar (continued)

- At this point, the Reports tab is limited to landing pages and RAL modification requests, but other reports can be added later.
- Actions include things you can do, such as submitting a customer service request or exporting FCC Form 470 or 471 data.



Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | Manage Users | Manage Organizations | USAC Website | Contact Us | Help

Quick Links

- Quick links to actions you can take
 - File a program form (FCC Forms 470, 471, 486)
 - Manage users (edit, create, change permissions)
 - Manage organizations (edit information)
 - Contact us (open a customer service case)

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Navigation

Notes on filing program forms

- FCC Forms 470, 471, 486 can be filed from:
 - The links below the menu bar OR –
 - The parent organization's main page (click "Related Actions" and then the appropriate form, or click "FCC Forms" and then the appropriate button at the top of the page)
- FCC Form 498 can be filed from the parent organization's main page by clicking "Related Actions."
 - Only the school or library official or general financial contact will be able to see the FCC Form 498 link.



Notes on filing program forms

- FCC Form 472 (BEAR) must be filed in the legacy system (from the <u>Forms</u> page on the USAC website).
- •FCC Form 500 must be filed on paper for now.

Other program forms:

- FCC Form 474 (SPI), a service provider form, must be filed in the legacy system.
- FCC Form 473 (SPAC), a service provider form, must be filed in the E-File System.

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Notifications

 From this section, you can search for, generate, and view notifications such as a Funding Commitment Decision Letter or FCC Form 486 Notification Letter.



Entity Number	City	State	Zip Code
8810	Washington	DC	20036
9077	Alexandria	VA	23257
9079	Alexandria	VA	23687
9081	Alexandria	VA	23171
9083	Alexandria	VA	23159
	8810 9077 9079 9081	8810 Washington 9077 Alexandria 9079 Alexandria 9081 Alexandria	8810 Washington DC 9077 Alexandria VA 9079 Alexandria VA 9081 Alexandria VA

My Entities

• From this section, you can access and edit profile information for each of your entities (individual schools, library branches, non-instructional facilities, annexes).

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Navigation

My Tasks			
Name	Received	Status	Deadline
Edit Form 471 Application	3/20/2016 7:40 PM EDT	Accepted	
Create FCC Form 470	3/30/2016 12:15 PM EDT	Accepted	
Edit Form 471 Application	4/27/2016 4:04 PM EDT	Accepted	

My Tasks

- From this section, you can access tasks that need to be completed, such as certifying a form.
- If you start but do not certify a form, the system will create a task for you to return to and finish your work from where you left off.



ice Cases				
Topic	1	Nickname	Status	Date Created
FCC Form 472 - BEAR		kuguiyguig	Pending	6/22/2016 5:40 PM EDT
j	Topic	Topic ↑	Topic ↑ Nickname	Topic ↑ Nickname Status

Customer Service Cases

- EPC users can file customer service cases, which are requests sent to the Client Service Bureau (our call center).
 - To create a case, go to the Actions tab in the Menu Bar and choose "Contact Us."
 - You can ask a question, provide information, or make certain requests.

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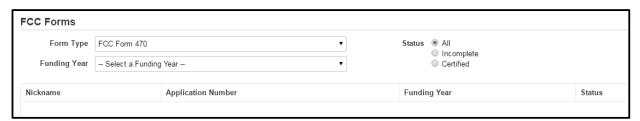
Navigation

Customer Sei	rvice Cases				
Case ID	Topic	1	Nickname	Status	Date Created
2400341	FCC Form 472 - BEAR		kuguiyguig	Pending	6/22/2016 5:40 PM EDT

Customer Service Cases

- From this section, you can view a customer service case that you have already submitted, track USAC actions on the case, attach documentation, and/or ask follow-up questions.
- More interactivity is possible than with the <u>Submit a</u> Question function.





FCC Forms

 From this section, you can search for and view program forms started and/or certified by your organization.

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Additional Actions

How to submit RNL modifications

- USAC issues a Receipt Notification Letter (RNL) in the News feed immediately after an FCC Form 470 is certified.
- Applicants can submit modifications to the form, including adding an RFP document.
- Navigate to the specific form and select the application.
- Under "Related Actions," choose the specific modification you want to make.
- Complete and submit the information requested.



Additional Actions

How to submit RAL modifications

- USAC issues a Receipt Acknowledgment Letter (RAL) in the News feed immediately after an FCC Form 471 is certified.
- Applicants can submit modifications (Submit Modifications).
 - Navigate to the specific form and select it.
 - Under "Related Actions," choose "Submit Modification Request (RAL)." You can submit one or multiple modifications by navigating to the appropriate section(s) of the request.

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Additional Actions

How to respond to PIA questions

- During USAC's review of an FCC Form 471, USAC may have questions for the applicant.
- USAC notifies the applicant of the questions through email to the contact person and an item in the News feed.
- The person who will answer the questions goes to Records and enters the application number to access the questions.
- All questions must be answered before the response can be submitted.



Additional Actions

How to submit appeals

- Applicants can appeal a USAC decision.
 - Click "Appeal" in the list of options just under the menu bar on the landing page. -OR-
 - Under the organization's profile page, click "Related Actions" from the left-hand menu and "Create Appeal" from the list of options.
 - Identify the FRN(s) and provide the information requested.
 - Receipt confirmation sent (COMING SOON)

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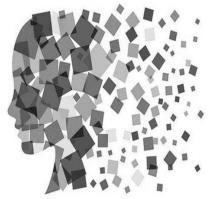


Getting Assistance

Where to go for help

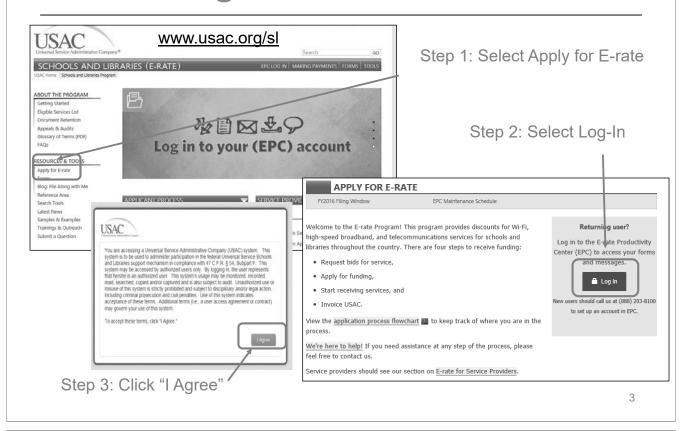
- Call the Client Service Bureau at (888) 203-8100 for help with the following:
 - Verifying accounts and account administrators
 - Updating profile information
 - Creating new users and updating existing users
 - Linking organizations
 - General questions about the portal

E-rate Productivity Center: How-To Guide



How to Log into EPC

How to Log-In to EPC

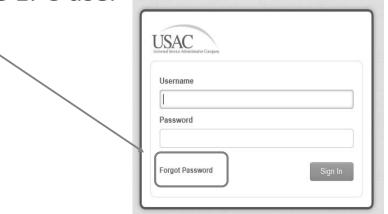


How to Set or Reset EPC Password

How to Set or Reset EPC Password

 Notes: Passwords expire after 60 days, so you'll have to reset your password frequently

 Username is always the lowercase e-mail address of the EPC user

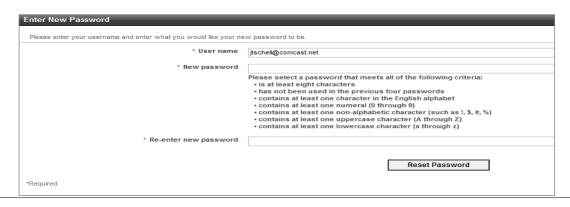


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How to Set or Reset EPC Password

The Password Reset Screen will display





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How to Accept EPC Terms and Conditions

7

How to Accept EPC Terms/Conditions

 If you are logging into EPC for the first time, before you can complete any tasks, you must accept the Terms and Conditions:



Step 1: Click the link



Step 2: Click
"Complete Terms and
Conditions"

Complete Terms of S	Service Agreement			
Please agree to the following Terms of Service before pairing access to EPC.				
Terms of Service:				
Last Updated April 13, 2015				
	EPC ACCESS AGREEMENT			
scollectively "EPC") provided by the Universal Se suite and associated documentation (collective)	poples to the Eriza Productivity Contex and all Erizar Productivity Contex related systems and networks were Administrated Company (1984). Again Corporation's Pappin's Dustriess process management software by the Totherwin is and IPET IPET was mortant in appin of the Nated Universal Sense, Extended to Erizar Program's that holgs orthics such as digitive schools and strates coldain telecommunications at the Company of the Company of the Sense of the Company of the			
service providers ("Sorvice Providers"), (3) consulted fines the relationships between both USAC at	ss and use EPC, each of winch is a "Siltentible" for purposes of this Agreement (1) applicates (Applicates), [2] subsets (Coundates), and (4) United States grammond apporties (Agency or "Agencies). This Agreement of gibb Siltentible or of (1) each proceed what accrease EPC is an abstract by and in belief five Siltentible is EPC as authorized by and on behalf of the Soltectible are referred to as "you" (sind variations such as "you") in			
(1) YOU ARE AT LEAST 18 YEARS OLD. (2) Y STATES AND TERRITORIES (COLLECTIVELY THE COMPANY, ORGANIZATION OR ENTITY O	G FOR ACCESS TO EPC AS A REPRESENTATIVE OR EMPLOYEE OF A SUBSCRIBER, YOU COMFIRM THY OWNER, BE ACCESSION AND USING EPC ONLY WITHIN THE LIMITED STATES, MILLIONIGETS WHOULD REPRETED TO AS WITHING STATESY; (S) YOU HAVE SHAD WITH SECREPHANT ALD YIELDON TO USE AND ON PHONES ESHALLY YOU ARE ACCESSIONED HIS ASSESSMENT AND USE ASSESSMENT ON USING EPC. ON PHONES ESHALLY YOU ARE ACCESSIONED HIS ASSESSMENT AND RECORD STATES OF USING EPC.			

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

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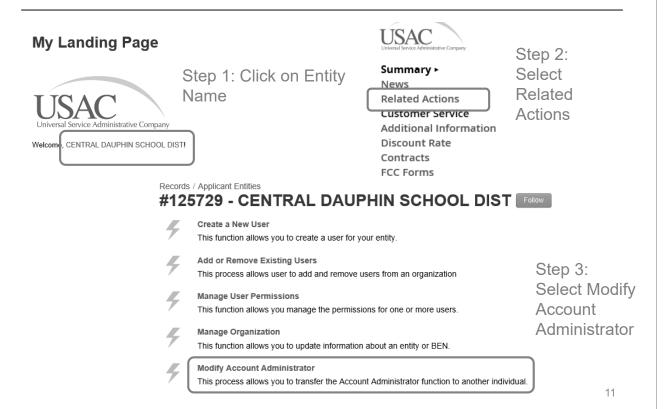
How to Change Account Administrators

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 <u>is already</u> a User in EPC
- Then... the current AA simply 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 B

• 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 <u>not</u> already a User in EPC
- Then the current AA 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)
- The EPC system will then send an automated e-mail to the new user asking them to log-in to EPC, establish their password, and accept their EPC Terms and Conditions.
- After the new user has done this, the current AA can click on Modify Account Administrator and designate the new user as the new AA.

My Landing Page



Step 1: Click on Entity Name



Summary >

News

Related Actions

customer Service

Additional Information
Discount Rate
Contracts
FCC Forms

Step 2: Select Related Actions

Records / Applicant Entities

#125729 - CENTRAL DAUPHIN SCHOOL DIST Follow



ate a New User

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

4

Add or Remove Existing Users

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

7

Manage User Permissions

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

4

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 3: The current AA creates a new user. The new user will receive an e-mail with steps to follow

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How to Change Account Administrators

Situation C

- The previous AA is NOT still at the school or library, USAC must intervene
- The new AA must e-mail the following information to USAC at: <u>sldpr@gdit.com</u> 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:

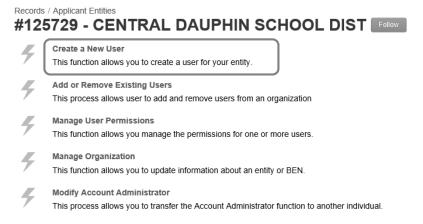
- USAC will then establish the new AA as a "User" in the organization's EPC portal and the system will send an e-mail instructing them to log-in to your EPC account and accept the Terms and Conditions
 - Before they can do this, they will have to establish your EPC password which is done by clicking on the "Forgot Password" link on the EPC log-in page
 - Please note that the Terms/Conditions that must be accepted in the portal are not the same as accepting the password terms/conditions.
- After logging in to EPC and accepting the T/Cs, they must send another e-mail to sldpr@gdit.com telling USAC they have accepted your T/Cs, and ask them to set them up as the Account Administrator

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How to Create a New EPC User

How to Create a New EPC User

- Only the AA can perform this task
- Under Related Actions, select Create a New User

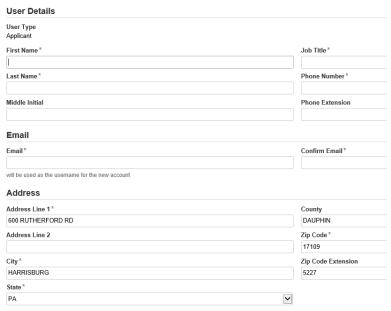


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How to Create a New EPC User

Complete the information form

Create A User for CENTRAL DAUPHIN SCHOOL DIST



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How to Create a New EPC User

- Assign the new user their EPC Permissions
 - View only: can only look at forms
 - Partial: can enter data, but can't submit forms
 - Full: can enter data and submit 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	✓ F	ull 🗸	Full	~	School or Library Official	Full	~	Full	~	Full	~

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How to Create a New EPC User

- The new User will then receive an automated e-mail from EPC asking them to log-in and accept their Terms and Conditions
 - Note: After the new User clicks on the link in the e-mail, they only have 15 minutes to accept the T/Cs

How to Change Users' Permissions

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How to Change Users' Permissions

Only the AA can perform this task

#125729 - CENTRAL DAUPHIN SCHOOL DIST

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.

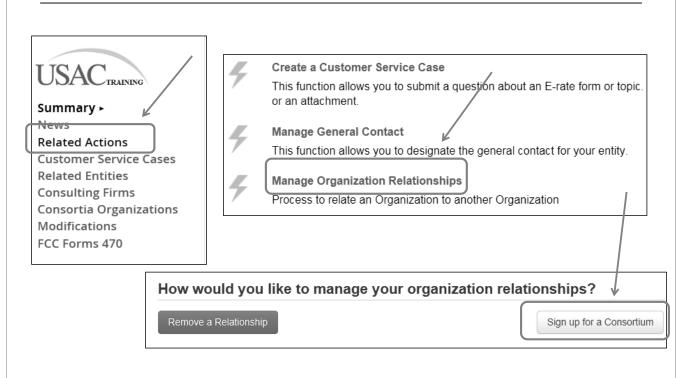
How to Join a Consortium

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How to Join a Consortium

- In order for an entity to participate in an Erate consortium, they must be "linked" to that consortium in EPC
- This linkage may be done by the school/library or by the consortium lead

How to Join a Consortium

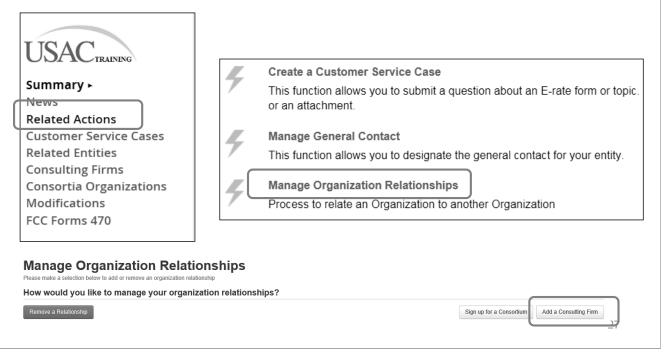


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How to Add a Consulting Firm

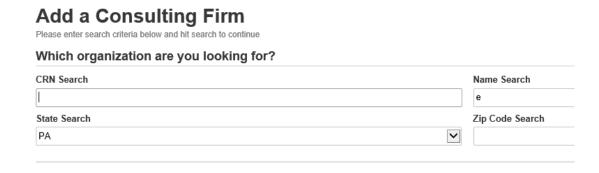
How to Add a Consulting Firm

Only the AA can perform this task



How to Add a Consulting Firm

 Enter one piece of search criteria, or click search to see all consultants based in your state



How to Add a Consulting Firm

- After you have selected the Consulting Firm, you
 must next add the actual consultant (person) with
 whom you are working as a User in your organization
- Select > Related Actions > Add Existing Users to search for the person's name





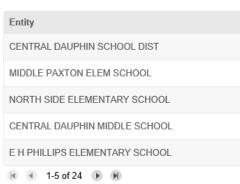
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How to Update Building Entity Data

How to Update Building Entity Data

- From EPC Landing Page, look under Entities
- Select the building whose data you would like to modify
- If you have more than 5 buildings, scroll through the list

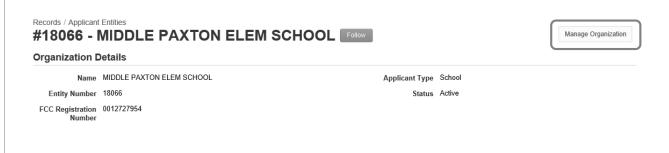
 My Entities
 - (You can sort)



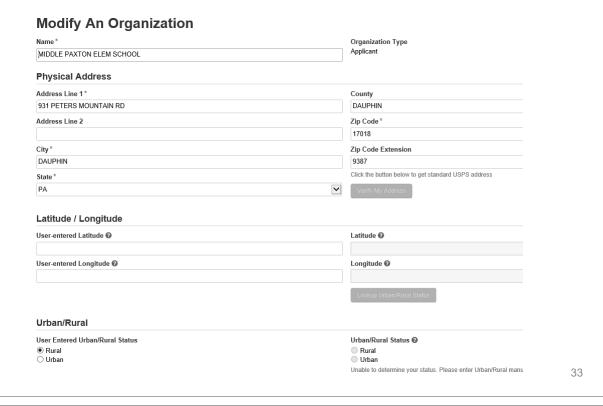
31

How to Update Building Entity Data

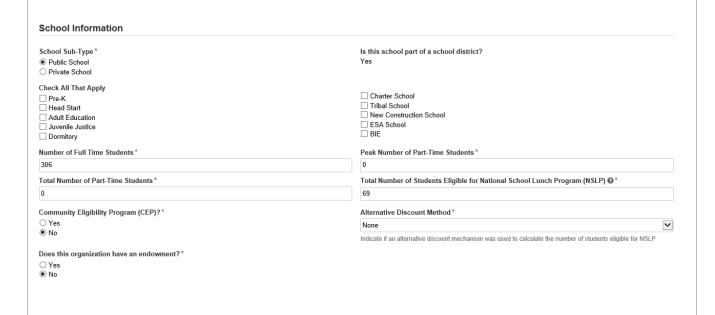
- Click Manage Organization in the top right to view the page and edit data
- This is the page where you will update enrollment/NSLP data each year



How to Update Building Entity Data



How to Update Building Entity Data



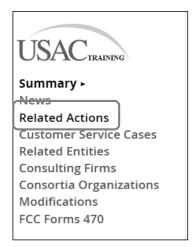
How to Update Connectivity Survey

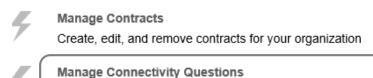
35

How to Update Connectivity Survey

- The connectivity survey should be completed annually, unless there are no changes from the previous year
- The data should be as of the date you complete the survey
- The survey is then ported over to the Form
 471

How to Update Connectivity Survey





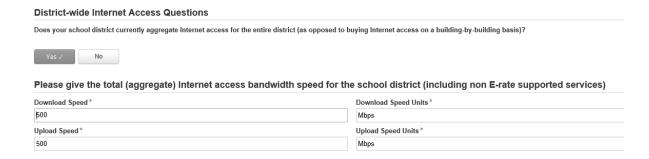
Note: This link is at the bottom of the lightning bolt list

Form for Entities to answer required Connectivity Questions.

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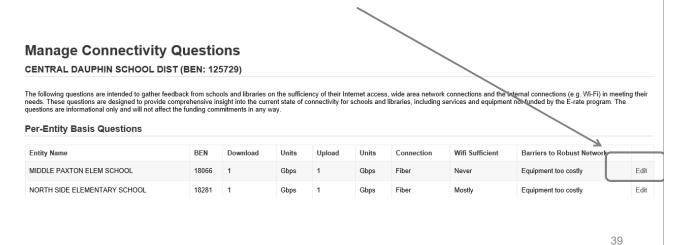
How to Update Connectivity Survey

 The first page is related to the Entity's Internet Access (not building-level data)



How to Update Connectivity Survey

- The second page is related to the broadband and Wi-Fi data for each school/library
- Click "Edit" to edit building's data



How to Update Connectivity Survey

- After clicking "Edit," that building's survey will appear at the bottom of the page
- Enter the broadband and Wi-Fi data for that building and click "Save Changes"
- Complete this task for each building by returning to the list of buildings

What is the total bandwidth speed from this location (including non E-rate supported services)?	
Download Speed*	Download Speed Units *
1	Gbps
Upload Speed*	Upload Speed Units *
1	Gbps
What is the predominant connection type coming to this location?*	How sufficient is the quality of the Wi-Fi at this location?
Fiber	Never
What are your biggest barriers to having a robust internal network in your classrooms at this location? $^{\!$	
Equipment too costly	