

E-rate Productivity Center: How To Change Account Administrators & Create Users



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How to Change 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 previous 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 previous 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. Previous 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

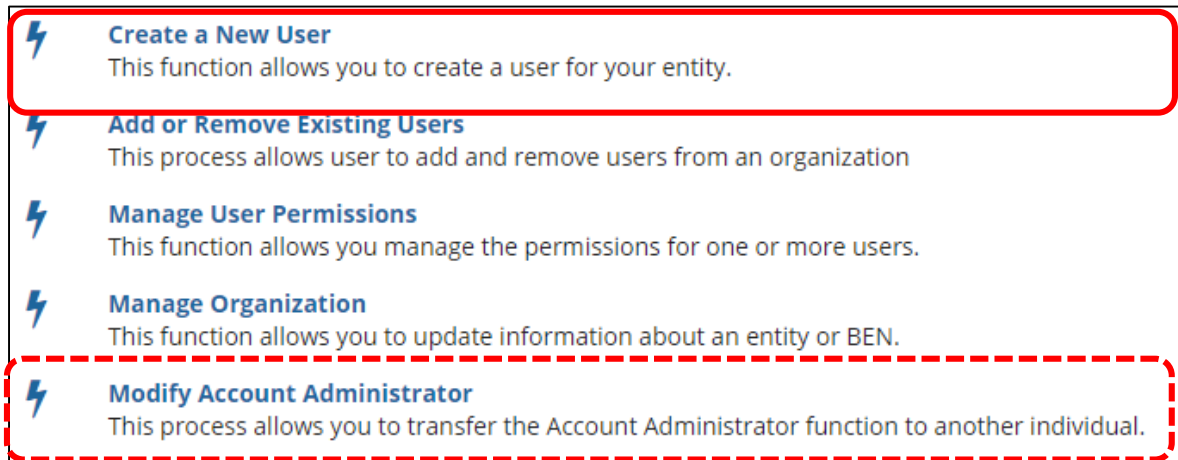


Records / Applicant Entities

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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



↑
Step 2:
Select
Related
Actions

How to Change Account Administrators

Situation C

The previous 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 Client Services Bureau (CSB) for assistance
2. CSB will ask New AA for contact information and will have the New AA send the CSB 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 CSB 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 accept the T/Cs
5. 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

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

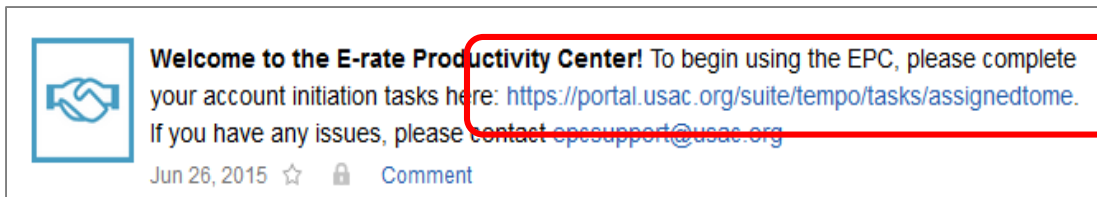
In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- 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 Accept EPC Terms/Conditions

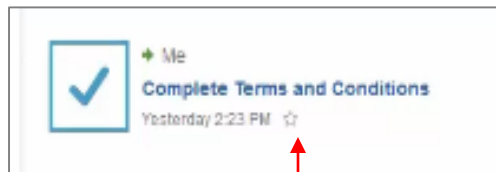
- If you are logging into EPC for the first time, before you can complete any tasks, you must accept the EPC Terms and Conditions:



Welcome to the E-rate Productivity Center! To begin using the EPC, please complete your account initiation tasks here: <https://portal.usac.org/suite/tempo/tasks/assignedtome>. If you have any issues, please contact opesupport@usac.org.

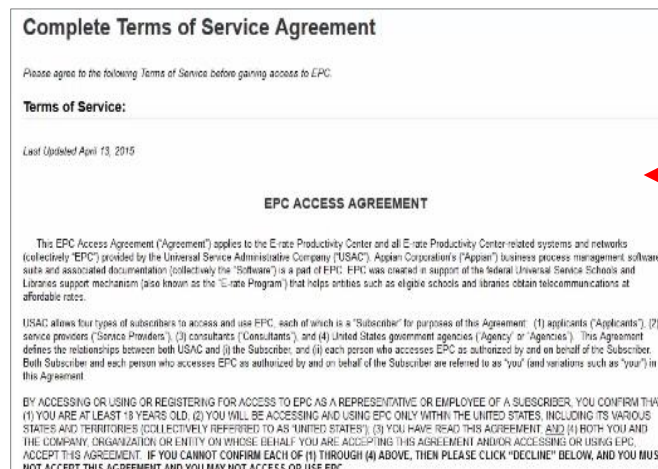
Jun 26, 2015 ☆ 🔒 Comment

← Step 1: Click the link



Me Complete Terms and Conditions Yesterday 2:23 PM ☆

Step 2: Click "Complete Terms and Conditions"



Complete Terms of Service Agreement

Please agree to the following Terms of Service before gaining access to EPC.

Terms of Service:

Last Updated April 13, 2015

EPC ACCESS AGREEMENT

This EPC Access Agreement ("Agreement") applies to the E-rate Productivity Center and all E-rate Productivity Center-related systems and networks (collectively "EPC") provided by the Universal Service Administrative Company ("USAC"), Assiitan Corporation's ("Assiitan") business process management, software suite and associated documentation (collectively the "Software") as a part of EPC. EPC was created in support of the Federal Universal Service Schools and Libraries support mechanism (also known as the E-rate Program) that helps entities such as eligible schools and libraries obtain telecommunications at affordable rates.

USAC allows four types of subscribers to access and use EPC, each of which is a "Subscriber" for purposes of this Agreement: (1) applicants ("Applicants"), (2) service providers ("Service Providers"), (3) consultants ("Consultants"), and (4) United States government agencies ("Agency" or "Agencies"). This Agreement defines the relationships between both USAC and (i) the Subscriber and (ii) each person who accesses EPC as authorized by and on behalf of the Subscriber. Both Subscriber and each person who accesses EPC as authorized by and on behalf of the Subscriber are referred to as "you" (and variations such as "you") in this Agreement.

BY ACCESSING OR USING OR REGISTERING FOR ACCESS TO EPC AS A REPRESENTATIVE OR EMPLOYEE OF A SUBSCRIBER, YOU CONFIRM THAT (1) YOU ARE AT LEAST 18 YEARS OLD, (2) YOU WILL BE ACCESSING AND USING EPC ONLY WITHIN THE UNITED STATES, INCLUDING ITS VARIOUS STATES AND TERRITORIES (COLLECTIVELY REFERRED TO AS "UNITED STATES"), (3) YOU HAVE READ THIS AGREEMENT AND (4) BOTH YOU AND THE COMPANY, ORGANIZATION OR ENTITY ON WHOSE BEHALF YOU ARE ACCEPTING THIS AGREEMENT AND/OR ACCESSING OR USING EPC, ACCEPT THIS AGREEMENT. IF YOU CANNOT CONFIRM EACH OF (1) THROUGH (4) ABOVE, THEN PLEASE CLICK "DECLINE" BELOW, AND YOU MUST NOT ACCEPT THIS AGREEMENT AND YOU MAY NOT ACCESS OR USE EPC.

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