

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 Add Text as MFA Option (slide 9)
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How to Log into One Portal

*For instructions on how to set up your One Portal Account, see One Portal/MFA Set Up Guide at:
<http://e-ratepa.org/wp-content/uploads/2020/07/One-Portal-MFA-Set-Up-Guide.pdf>*

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.

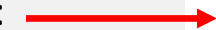
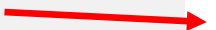

To learn more about USAC's MFA and to find a list of all USF IT applications included in the single portal, visit [USAC's website](#). If you cannot access the email associated with your account and need to set up a new log in, please contact your organization's USF administrator. If you need to reset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

Continue

Dashboard: You're In!

Dashboard

Dashboard will show systems for which you have access:

- To enter **EPC**, click **here**: 
- This link is for reimbursement forms for FY 2015 and prior (rarely used): 
- To enter the **ECF** system, click **here**: 

Schools and Libraries

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. EPC is now active and all the E-Rate invoices (FCC Form 427/BEAR and FCC Form 474/SPI, EPSI) for FY 2016 or later and All FCC Form 473/SPACs can now be submitted in the E-Rate Productivity Center (EPC). For more information on the legacy system consolidation, please visit our website or contact the Customer Service Center at (888) 203-8100.

E-Rate System Consolidation - The E-Rate Legacy system is now down and will only be available for submission for 473 SPAC Forms and invoices 2015 and prior. A [link](#) will take you to the directions on how to submit invoices for those funding years. For more information on the legacy system consolidation, please visit our website or contact the Customer Service Center at (888) 203-8100.

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

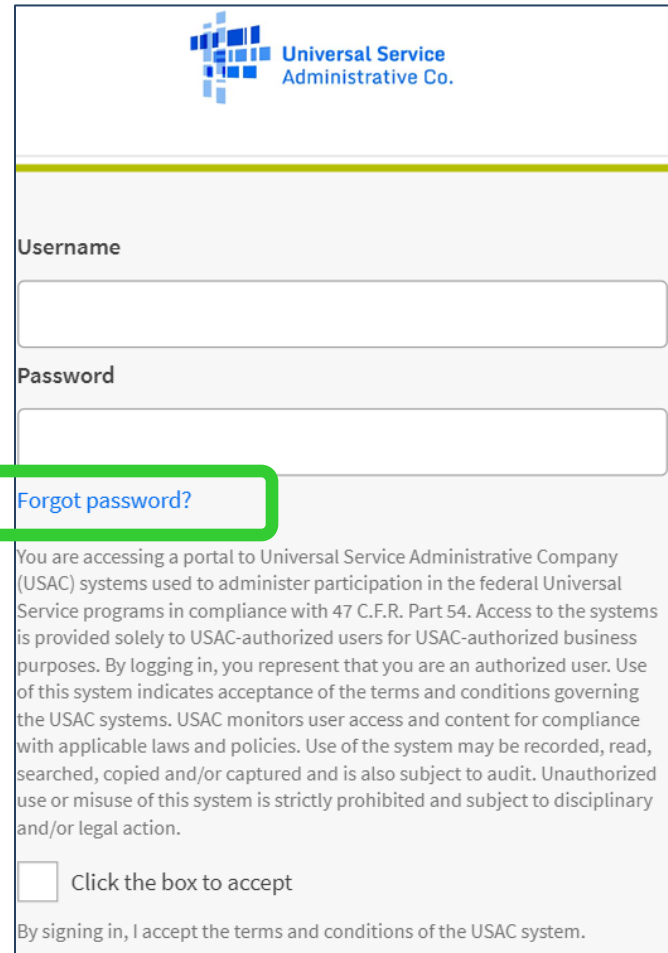
How to Set or Reset One Portal Password

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.



The screenshot shows the login interface for the Universal Service Administrative Company (USAC). At the top right is the USAC logo and name. Below the header are two input fields: 'Username' and 'Password'. A blue link labeled 'Forgot password?' is positioned below the password field and is highlighted with a green rectangular box. Below the input fields is a block of text containing the system's terms and conditions, and a checkbox for accepting these terms.

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.

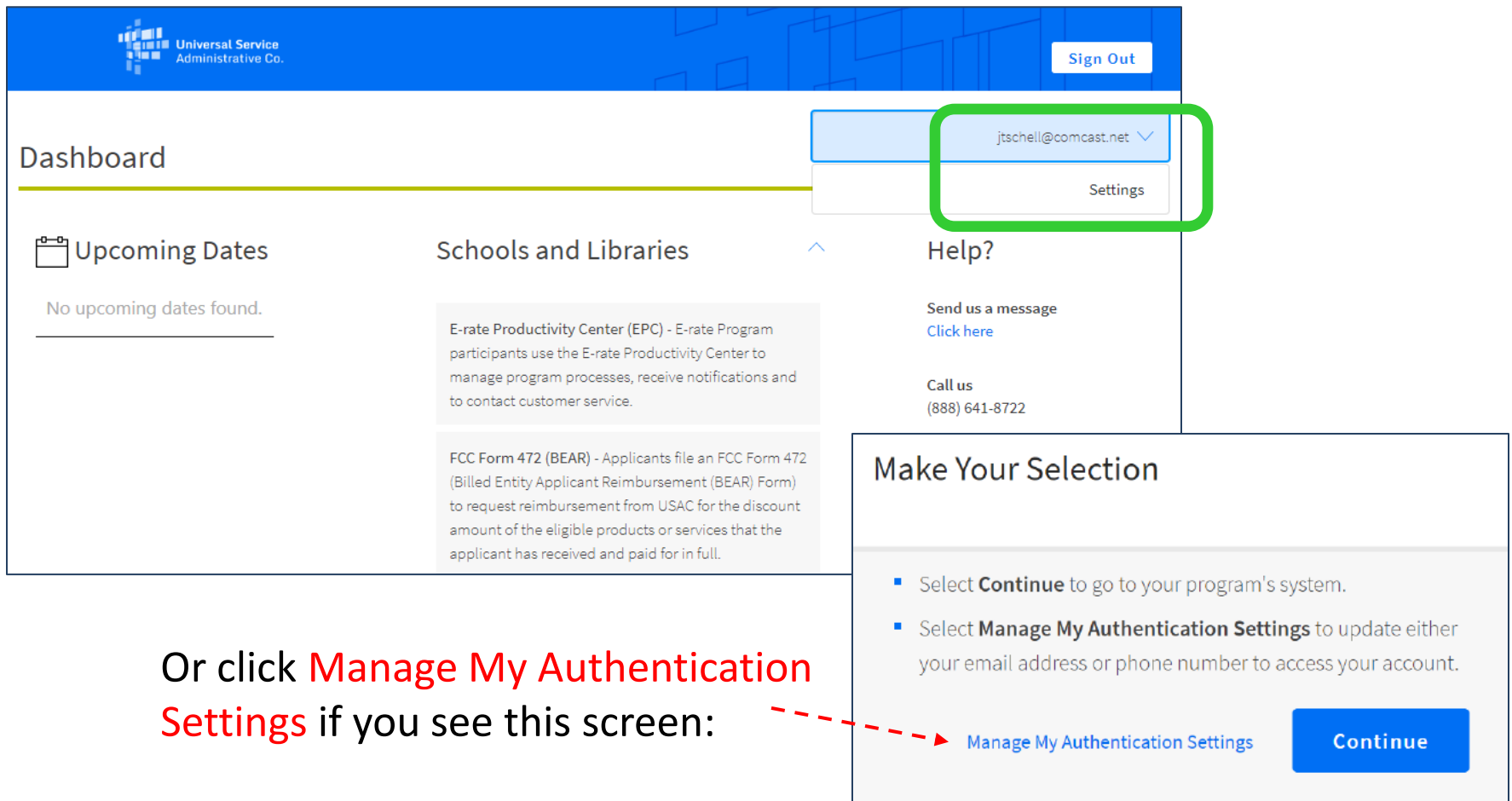
How to Set or Reset EPC Password

- 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 Add Text Multi-Factor Authentication Option

Adding Text MFA Option

Click your **Username (email address)** in the top right corner of Dashboard, then **Settings** to change your profile/settings, including adding text authentication.



The screenshot shows the dashboard of the Universal Service Administrative Co. In the top right corner, there is a 'Sign Out' button and a user menu. The user menu is open, showing the email address 'jtschell@comcast.net' and a 'Settings' option, which is highlighted with a green box. Below the dashboard, there are sections for 'Upcoming Dates', 'Schools and Libraries', and 'Help?'. The 'Upcoming Dates' section shows 'No upcoming dates found.' The 'Schools and Libraries' section has two cards: 'E-rate Productivity Center (EPC)' and 'FCC Form 472 (BEAR)'. The 'Help?' section has links for 'Send us a message' and 'Call us'. In the bottom right, there is a 'Make Your Selection' dialog box with two options: 'Continue' and 'Manage My Authentication Settings'. A red dashed arrow points from the text below to the 'Manage My Authentication Settings' option.

Universal Service Administrative Co. Sign Out

Dashboard

jtschell@comcast.net Settings

Upcoming Dates

No upcoming dates found.

Schools and Libraries

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.

Help?

Send us a message
[Click here](#)

Call us
(888) 641-8722

Make Your Selection

- Select **Continue** to go to your program's system.
- Select **Manage My Authentication Settings** to update either your email address or phone number to access your account.

[Manage My Authentication Settings](#) [Continue](#)

Or click **Manage My Authentication Settings** if you see this screen:

Updating Settings/Profile

On this page, you can add or modify any of these items.

The image shows a vertical list of settings cards. From top to bottom: 'Personal Information' with an 'Edit' button; 'Change Password'; 'Security Image' with an 'Edit' button; 'Extra Verification' (highlighted with a red border), which includes a checkmark icon, a description of extra verification, and a 'Text Message Code' section with a 'Setup' button; and 'Display Language' with an 'Edit' button.

Personal Information [Edit](#)

Change Password

Security Image [Edit](#)

✓ Extra Verification

Extra verification increases your account security when signing in to Okta and other applications you use.

Text Message Code [Setup](#)

Display Language [Edit](#)

To add the option of receiving verification codes via text to your cell phone, click on **Extra Verification**, then **Setup**.

Adding Text MFA Option

Enter your cell phone number, then click **Send Code**. A validation code will immediately be sent via text.

Set Up Text Message Verification

Enter the phone number you'll use to receive codes via text message, then click Send Code to verify that it works.

Country

United States

Select the country where your phone is registered.

Phone number

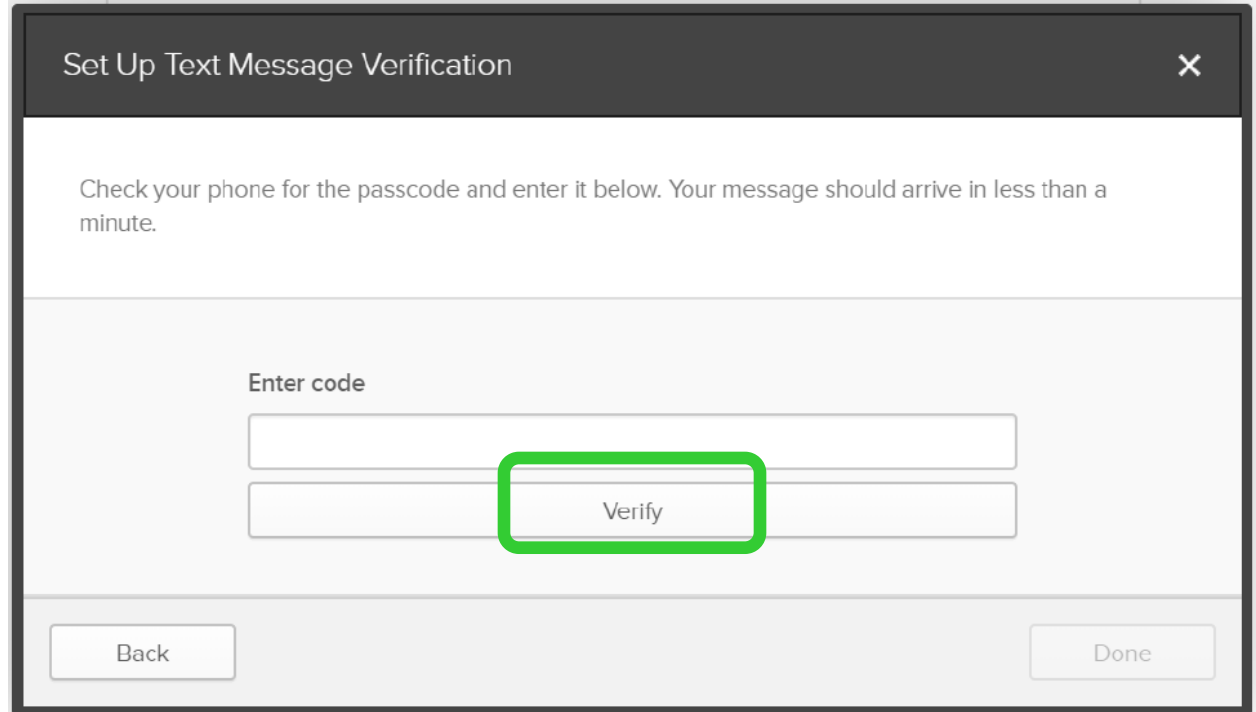
(717) 574-xxx

Enter your number the way you normally dial it. Do not add your country code prefix.

Send Code

Adding Text MFA Option

Enter the code you received, then click **Verify**.



Set Up Text Message Verification

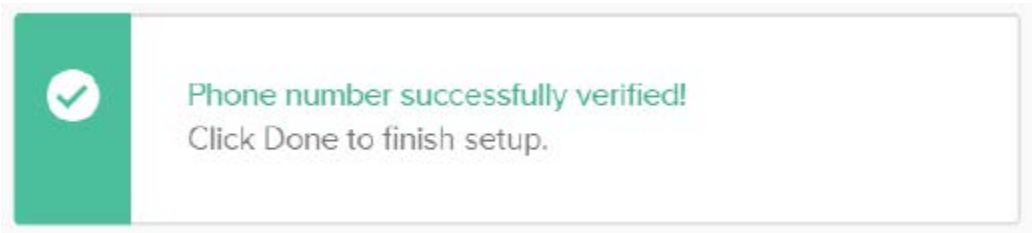
Check your phone for the passcode and enter it below. Your message should arrive in less than a minute.

Enter code

Verify

Back Done

You'll receive this message if your code was validated. Click **Done**.



Adding Text MFA Option

An e-mail confirmation will be sent, confirming that you've successfully entered an additional MFA option.

MFA Factor Enrolled



USAC <noreply@usac.org>
To jtschell@comcast.net

Hi Tritt Schell,

Tritt Schell Julie enrolled in multi-factor authentication for your account jtschell@comcast.net.

Details

SMS Authentication

Tuesday, July 28, 2020

Mechanicsburg, Pennsylvania, United States

Adding Additional E-mail Address MFA

- You can also choose to receive verification codes to an e-mail address that is different from your account login username e-mail address and/or include a second e-mail address MFA option.
 - This will not change the username address you use to log in to One Portal.
- Go to Personal Information on the Settings page and click Edit



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.

Note: By far, the easiest way to change an EPC AA is to have the new AA call USAC’s Client Services Center (CSC) at: 888-203-8100 and they can perform the steps on the backend.

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

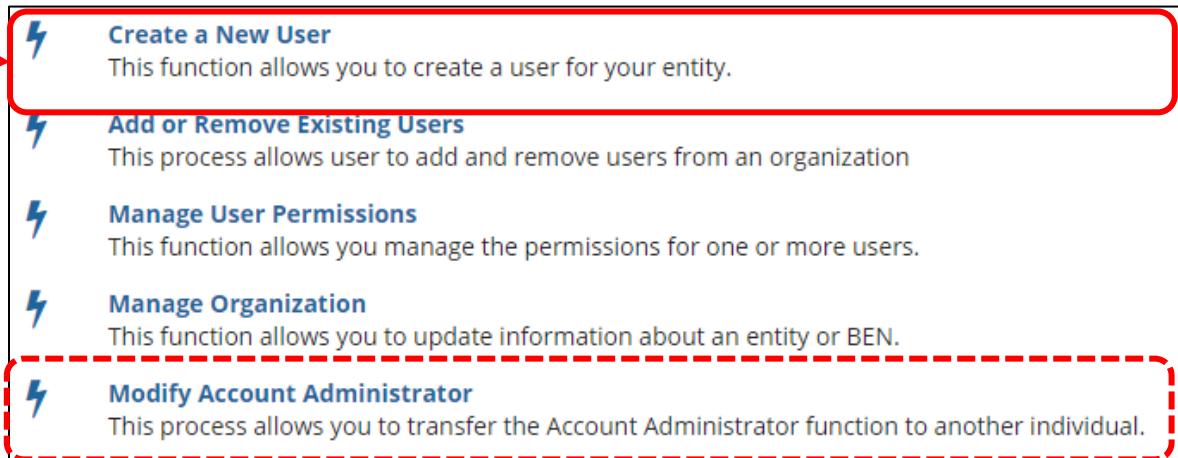


Records / Applicant Entities

#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'



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 Add 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 Add 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 Add 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 Add 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 *	<input type="text"/>	Job Title *	<input type="text"/>
Last Name *	<input type="text"/>	Phone Number *	<input type="text"/>
Middle Initial	<input type="text"/>	Phone Extension	<input type="text"/>

Email

Email *	<input type="text"/>	Confirm Email *	<input type="text"/>
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will be used as the username for the new account

Address

Address Line 1 *	<input type="text" value="600 RUTHERFORD RD"/>	County	<input type="text" value="DAUPHIN"/>
Address Line 2	<input type="text"/>	Zip Code *	<input type="text" value="17109"/>
City *	<input type="text" value="HARRISBURG"/>	Zip Code Extension	<input type="text" value="5227"/>
State *	<input type="text" value="PA"/>		<input type="text"/>

How to Add 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 Add 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,

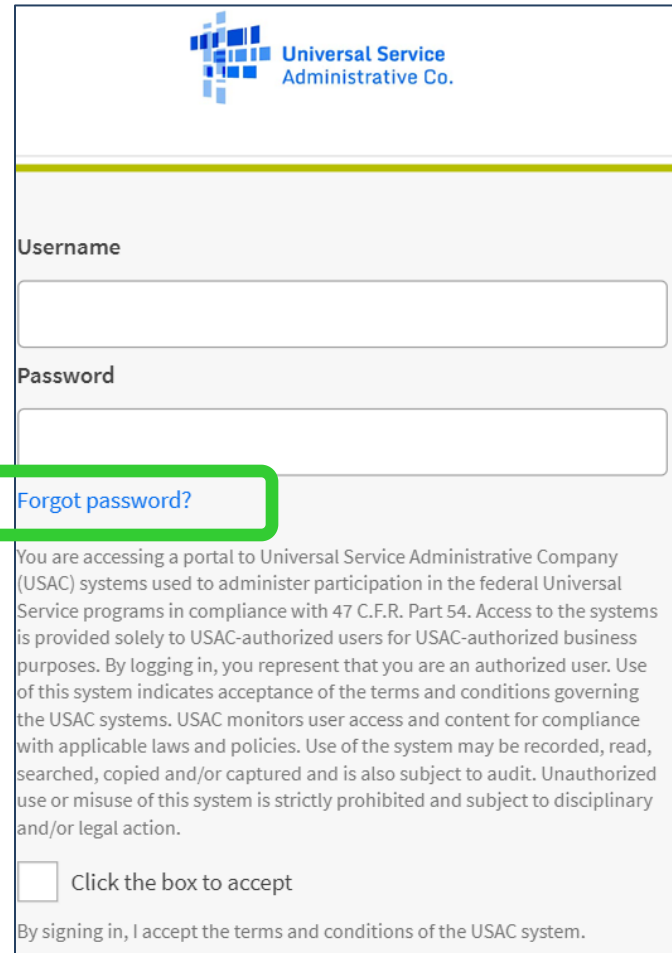
Universal Service Administrative Co.


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 Add 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"

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"), Aptian Corporation's ("Aptian") business process management, software suite and associated documentation (collectively the "Software") is 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"





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 ▼

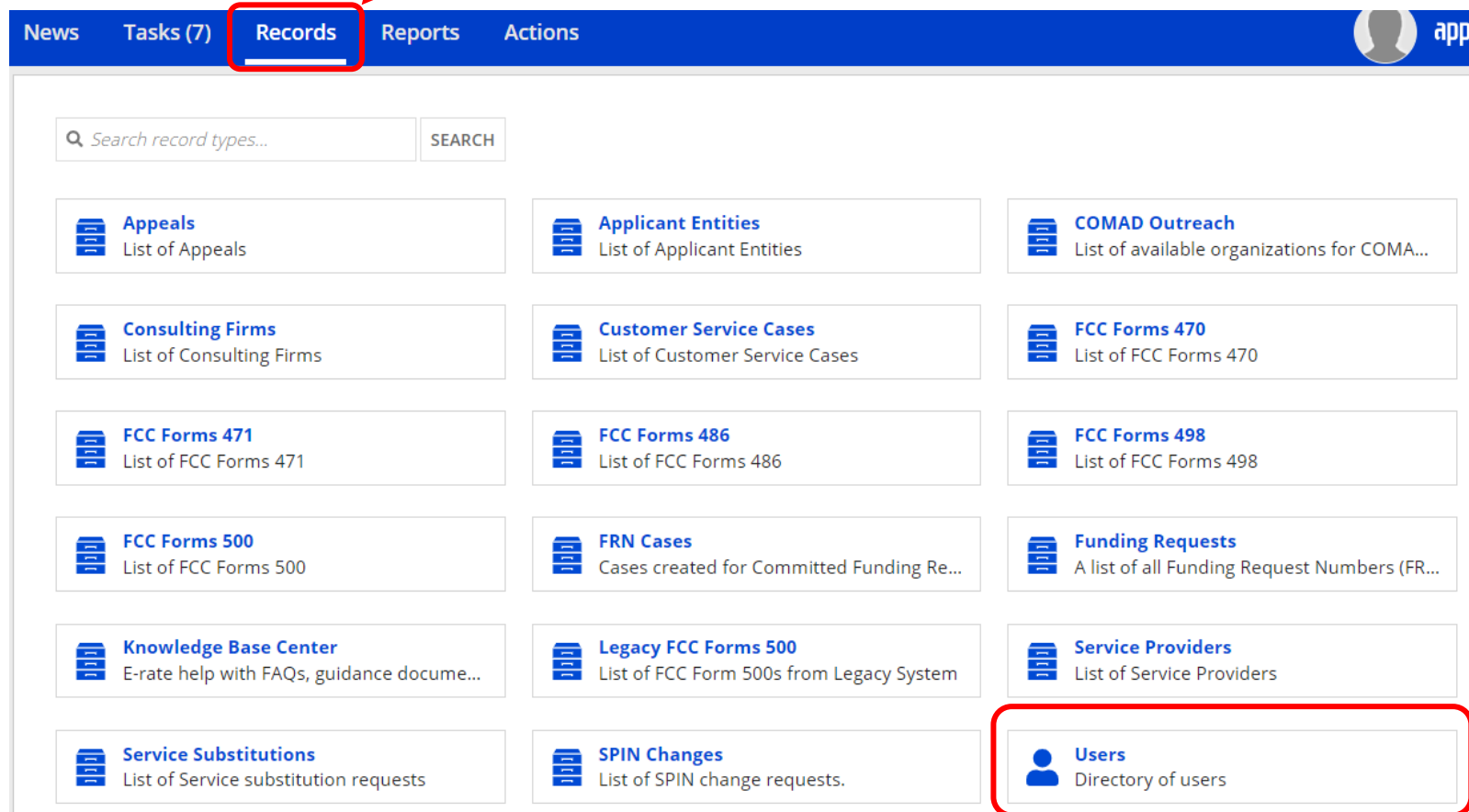
CANCEL

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

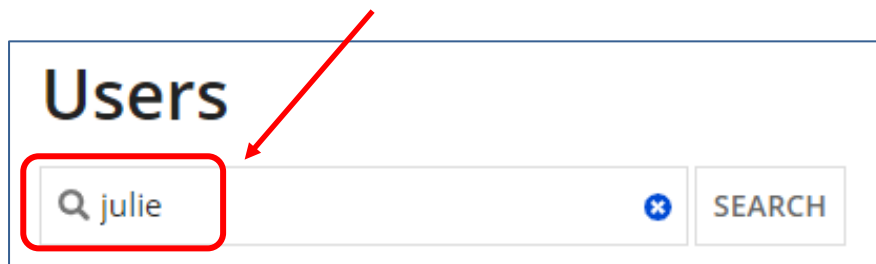
Service Substitutions
List of Service substitution requests

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

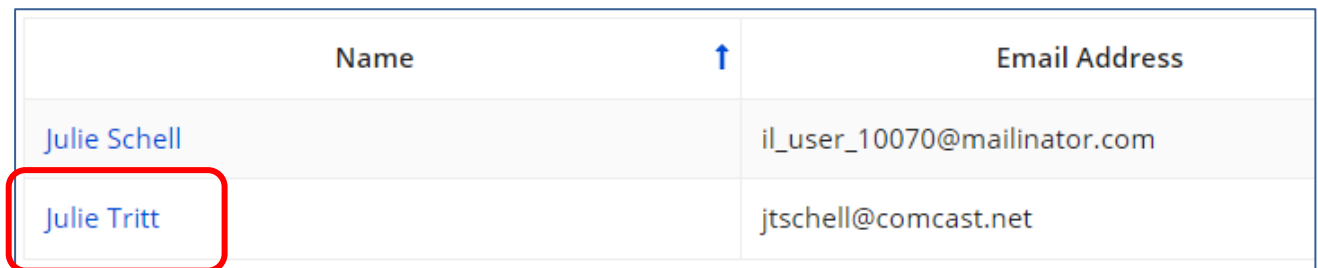


Users

Q julie

SEARCH

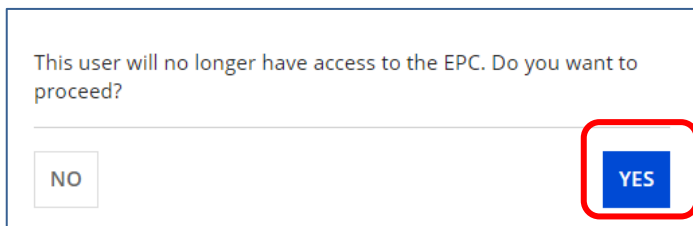
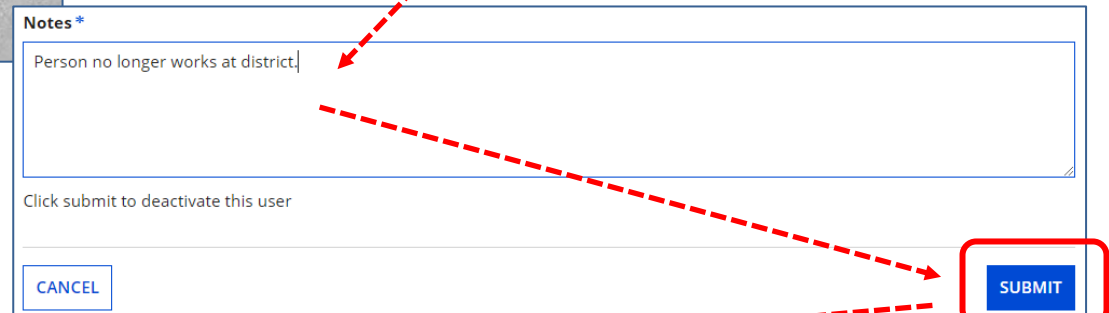
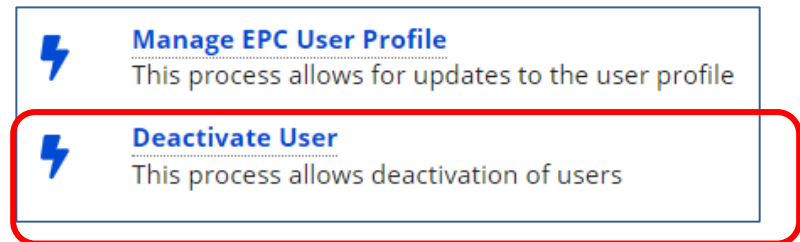
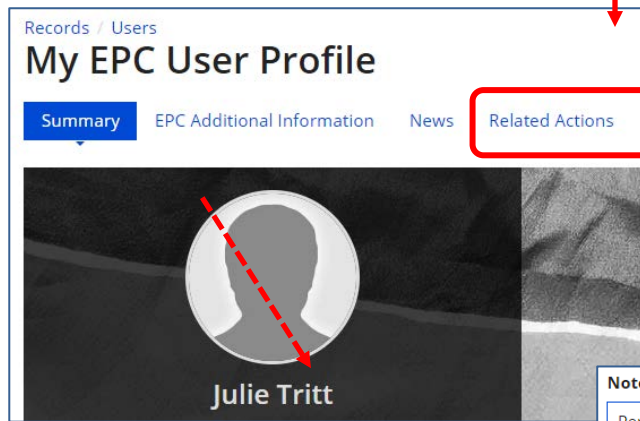
- Then click on the User's Name that you wish to remove



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' interface shows a section for 'Existing Organizations' with a table. The first row is selected, indicated by a red box around the checkbox and a red arrow pointing to it from the left. Below the table are three buttons: 'CANCEL', 'CREATE A NEW USER', and 'ADD AND REMOVE EXISTING USERS' (circled in red with a red arrow pointing to it from the right). A third button, 'MANAGE USER PERMISSIONS', is located below the second button.

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

CANCEL CREATE A NEW USER **ADD AND REMOVE EXISTING USERS** MANAGE USER PERMISSIONS

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

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.

Note: By far, the easiest way to change an EPC AA is to have the new AA call USAC’s Client Services Center (CSC) at: 888-203-8100 and they can perform the steps on the backend.

How to Link to a Consortium

How to Link to a Consortium

- In order for an entity to participate in an E-rate 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 Link to a Consortium

Step 1:
Click on
Entity
Name

My Landing Page

Training
Universal Service
Administrative Co.

Welcome, PAS BEST SCHOOL DISTRICT - (PARENT ENTITY)!

Step 2:
Select
'Related
Actions'

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
'Manage
Organization
Relationships'

- Manage General Contact**
This function allows you to designate the general contact for your entity.
- Manage Organization Relationships**
Process to relate an Organization to another Organization
- Create FCC Form 470**
This function allows you to create an FCC Form 470 for your entity.

Step 4: Select
'Sign up for a
Consortium'

Manage Organization Relationships

Please make a selection below to add or remove an organization relationship

How would you like to manage your organization relationships?

[Remove a Relationship](#) [Sign up for a Consortium](#) [Add a Consulting Firm](#)

How to Link to a Consortium

Sign up for a Consortium
Please enter search criteria below and hit search to continue

Which organization are you looking for?

BEN Search

Name Search

State Search

Zip Code Search

Step 5: Enter the Consortium BEN or partial name

Add Relationship(s)

<input type="checkbox"/>	BEN	Name	City	State	Zip Code
<input checked="" type="checkbox"/>	17000531	Bucks County IU RWAN Consortium			18901

Step 6: Select the consortium you wish to join in EPC

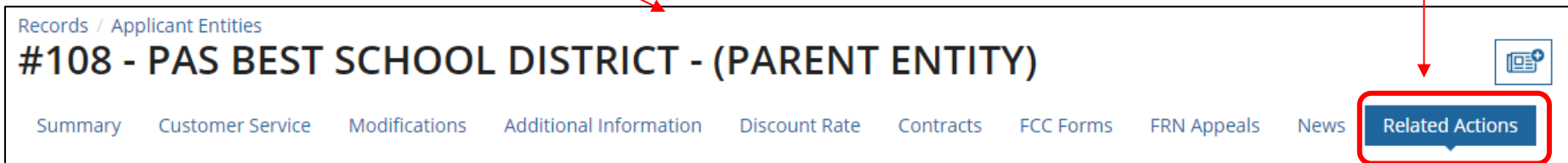
How to Add a Consulting Firm

How to Add a Consulting Firm

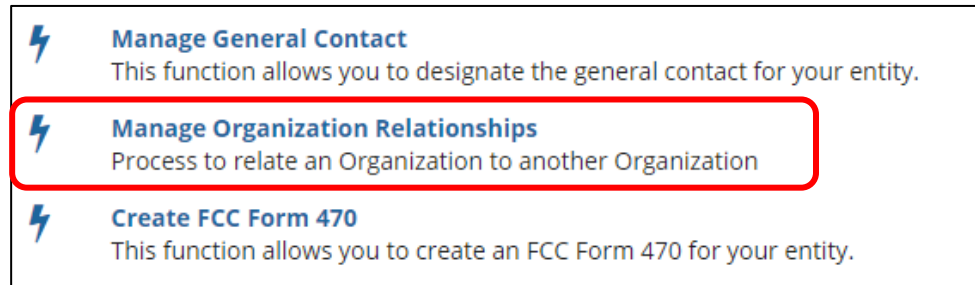
Step 1:
Click on
Entity
Name



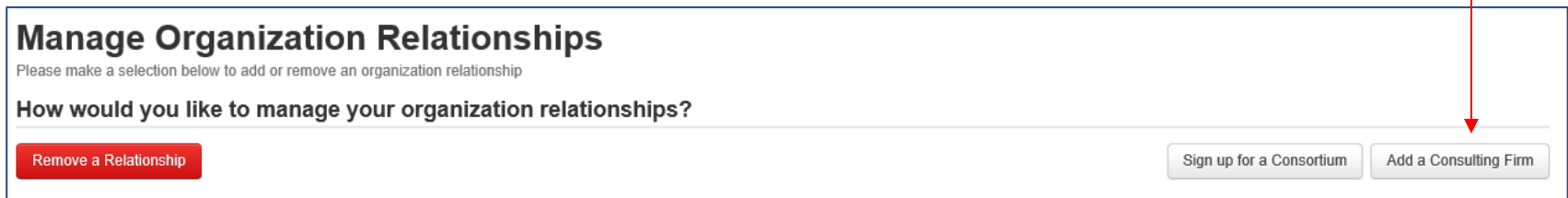
Step 2:
Select
'Related
Actions'



Step 3: Select
'Manage
Organization
Relationships'



Step 4: Select
'Add a
Consulting Firm'



How to Add a Consulting Firm

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

Add a Consulting Firm

Please enter search criteria below and hit search to continue

Which organization are you looking for?

CRN Search	<input type="text"/>	Name Search	<input type="text" value="e"/>
State Search	<input type="text" value="PA"/> <input type="button" value="v"/>	Zip Code Search	<input type="text"/>

How to Add a Consultant

- 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

Records / Applicant Entities

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

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



Create a New User

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



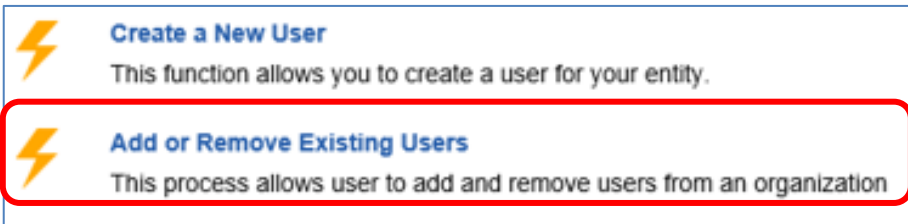
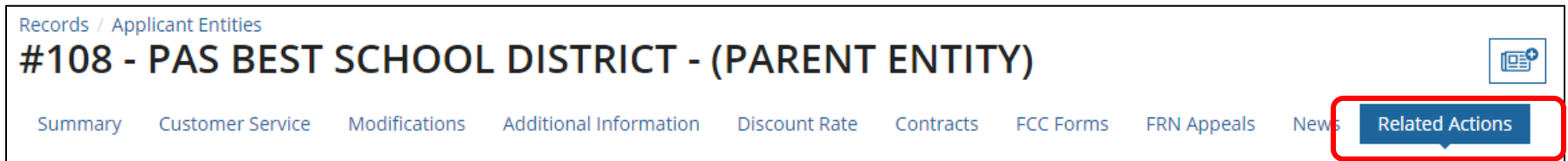
Add or Remove Existing Users

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

How to Remove a Consulting Firm

How to Remove a Consulting Firm

- Before you can remove a Consulting Firm, you first must remove all Consultant Users in your EPC profile
- Click District Name >> Related Actions > Add/Remove Existing Users to remove the Consultant User(s) > Click X to remove the Consultant User(s) > Submit



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

How to Remove a Consulting Firm

- Next, return to Related Actions
- Select Manage Organization Relationships, then Remove a Relationship

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**

-  **Manage General Contact**
This function allows you to designate the general contact for your entity.
-  **Manage Organization Relationships**
Process to relate an Organization to another Organization
-  **Create FCC Form 470**
This function allows you to create an FCC Form 470 for your entity.

Manage Organization Relationships

Please make a selection below to add or remove an organization relationship

How would you like to manage your organization relationships?

Remove a Relationship

Sign up for a Consortium

Add a Consulting Firm

How to Remove a Consulting Firm

- Enter one piece of search criteria in one of the search fields, then Search

Remove Organization Relationship

Please enter search criteria below and hit search to continue

Which organization are you looking for?

BEN/CRN Search	Name Search
<input type="text"/>	<input type="text" value="penguin"/>
State Search	Zip Code Search
<input type="text" value="Please select a value"/>	<input type="text"/>

Leave this blank

How to Remove a Consulting Firm

- Select the Consulting Firm that you would like to remove, then Submit

Remove Organization Relationship

Select a relationship from the grid below to remove

Which relationship would you like to remove?

*

<input checked="" type="checkbox"/>	BEN/CRN	Name	City	State	Zip Code	Organization Type
<input checked="" type="checkbox"/>	19637	Penguin Consulting	Baltimore	MD	21117	Consulting Firm

Questions?

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

