Online Form 525:
Access Set-up,
Screen Familiarization,
Bulk Upload

Online Form 525

This is a short introduction to the online Form 525, or e525, including how to set up access within E-File and a brief tutorial on entering data manually or via bulk upload.

Online Form 525

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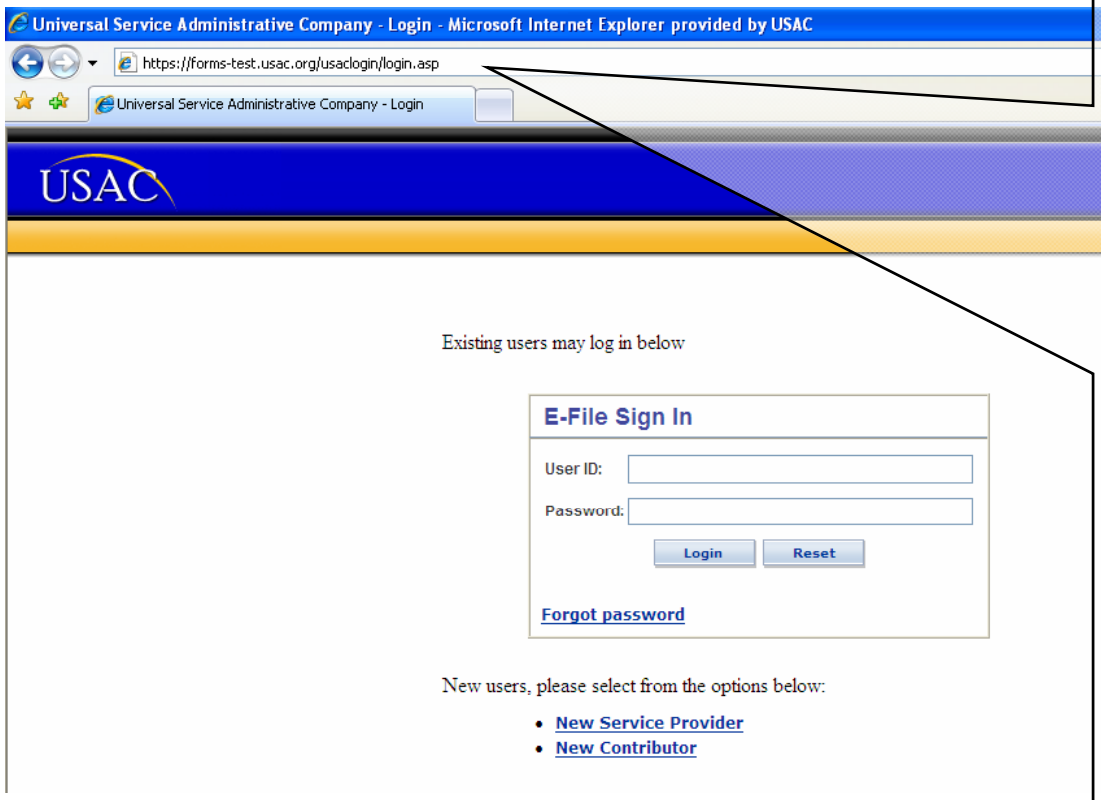
I. E-File:
Setting Up Access

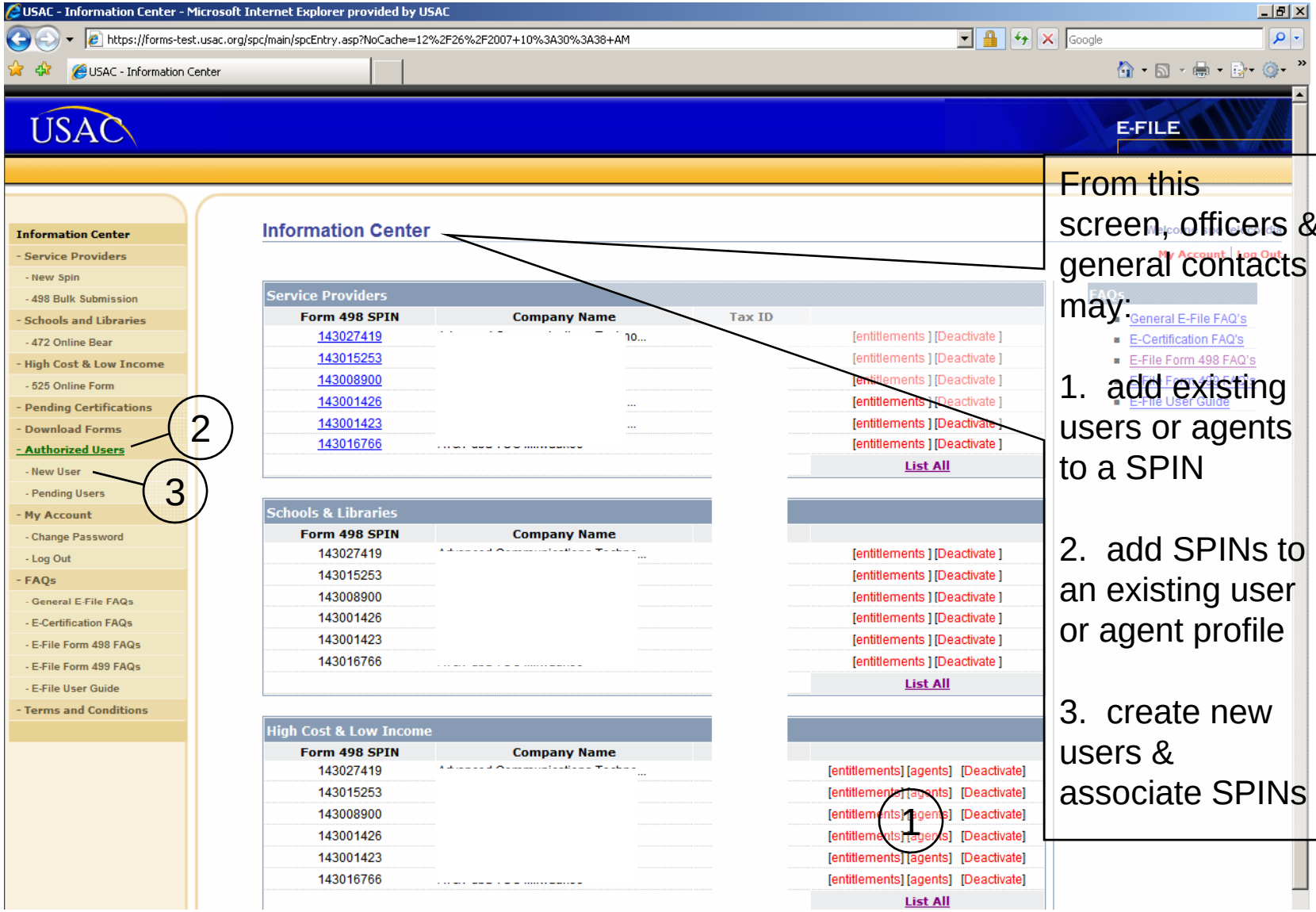
Online Form 525
E-File Login Screen



All e525 entitlements are governed through E-File, so it is important that you have access to an account level that can delegate responsibilities (Company Officer or General Contact), or set these authorized users up in advance, in which case you can skip to Section II.

The login URL is http://forms.usac.org or http://forms.universalservice.org, which will redirect you to the proper login page. The test URL is used throughout this presentation for demonstration purposes only.

E-File:
Start Screen



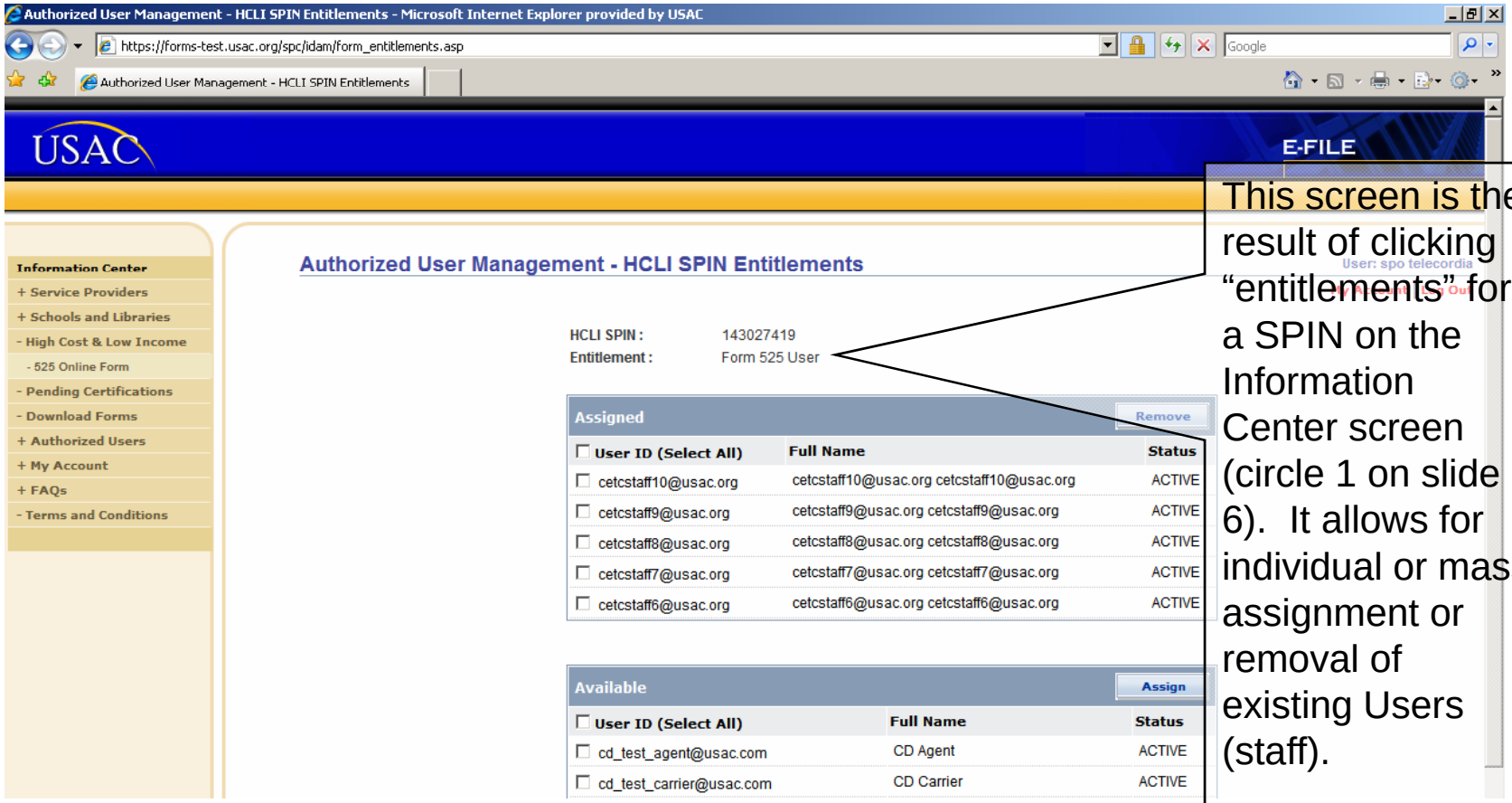
From this screen, officers & general contacts may:

1. add existing users or agents to a SPIN

2. add SPINs to an existing user or agent profile

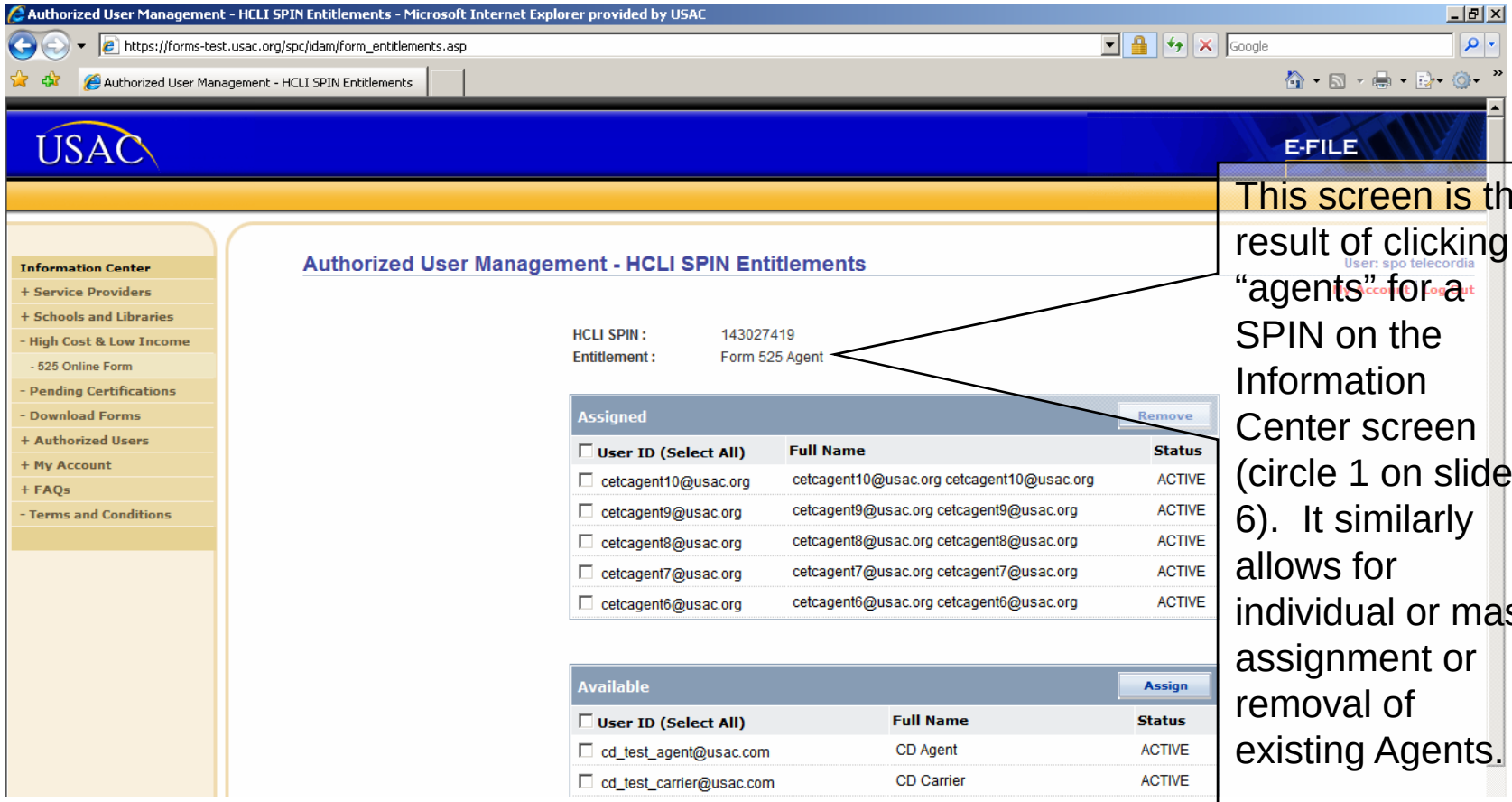
3. create new users & associate SPINs

E-File:
Authorized User Management by SPIN



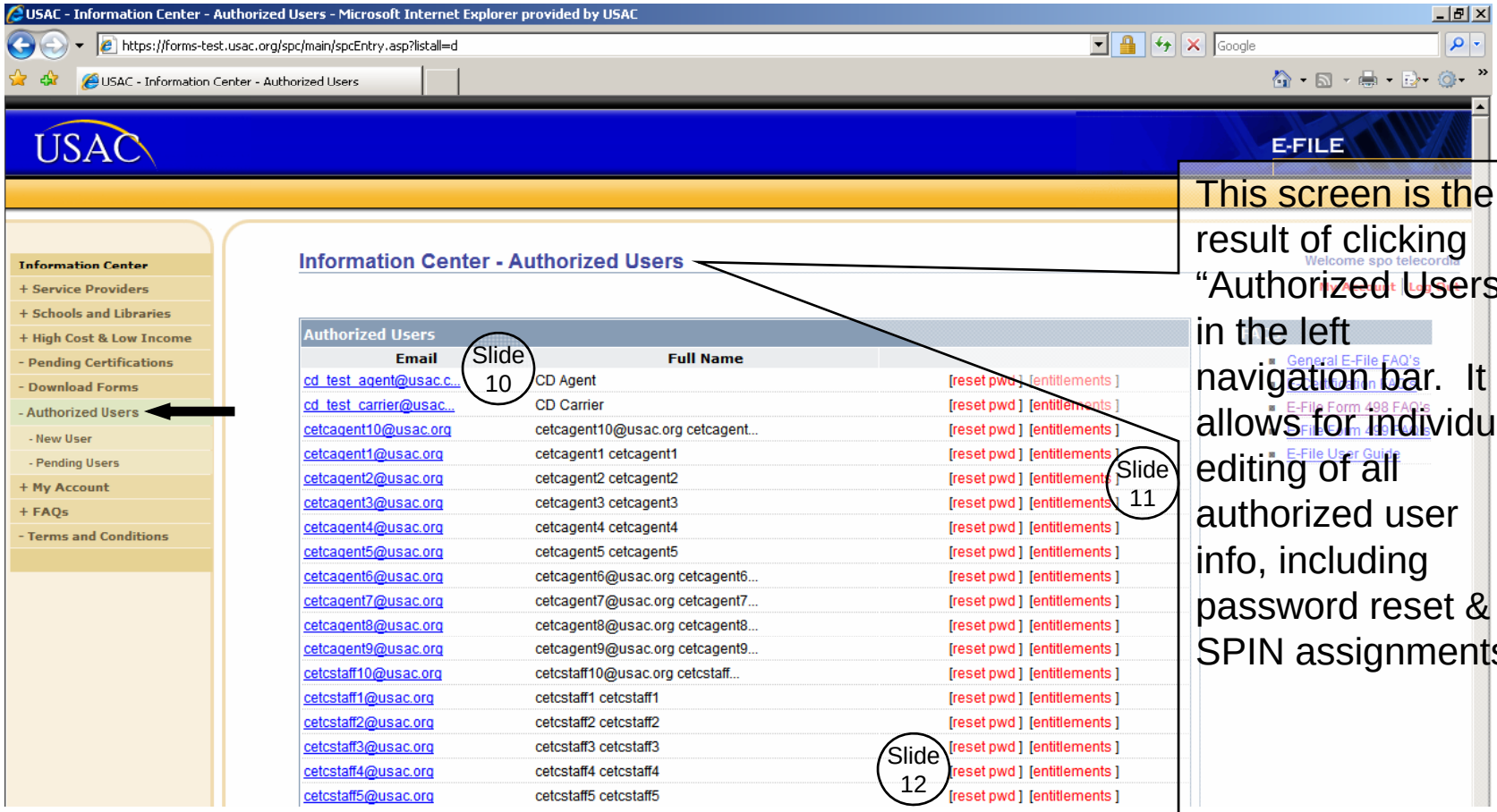
This screen is the result of clicking "entitlements" for a SPIN on the Information Center screen (circle 1 on slide 6). It allows for individual or mass assignment or removal of existing Users (staff).

E-File:
Authorized User Management by SPIN – Agents

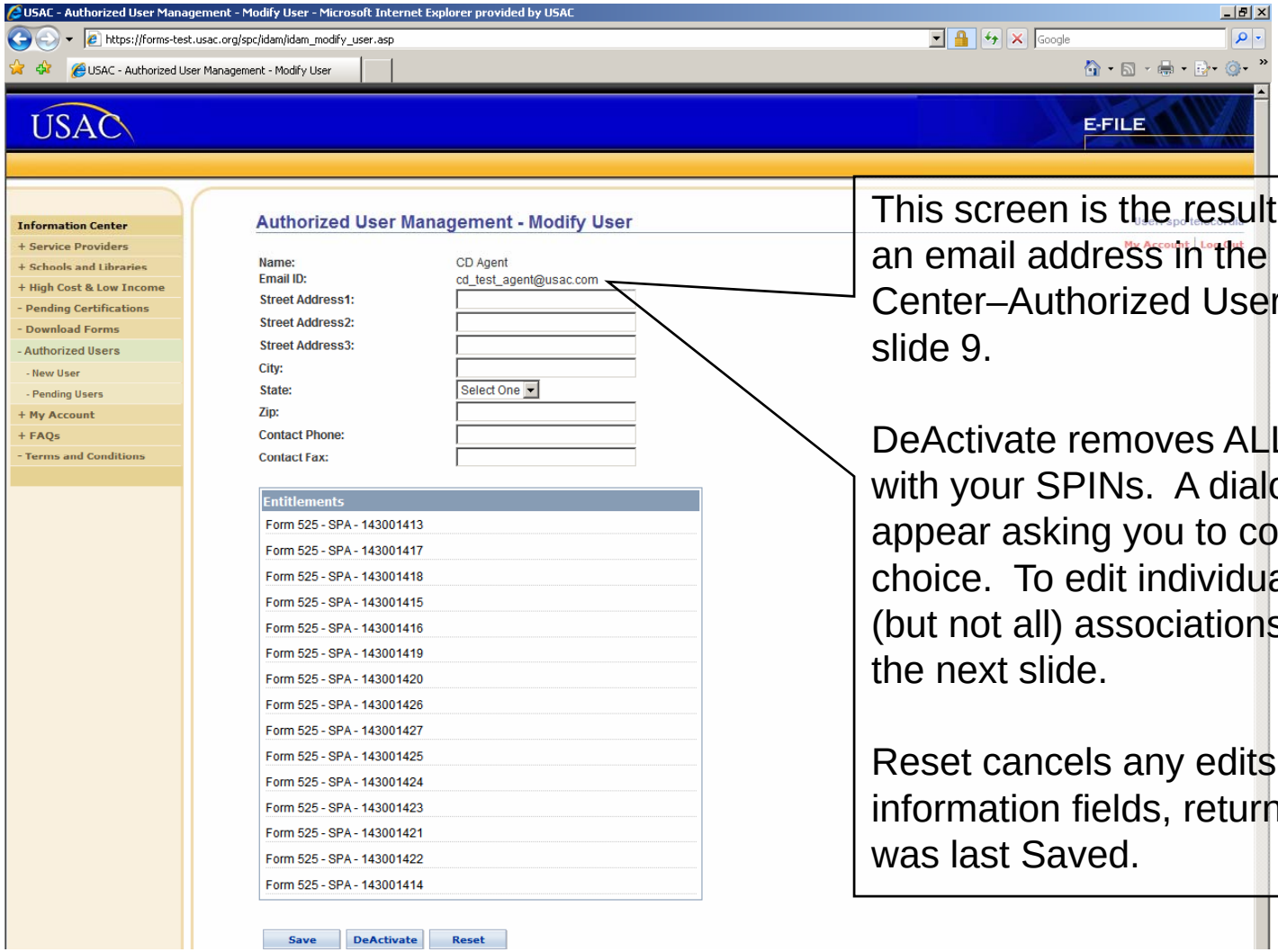


This screen is the result of clicking "agents" for a SPIN on the Information Center screen (circle 1 on slide 6). It similarly allows for individual or mass assignment or removal of existing Agents.

E-File:
Authorized User Management by List



E-File:
Authorized User Management – Modify User Info

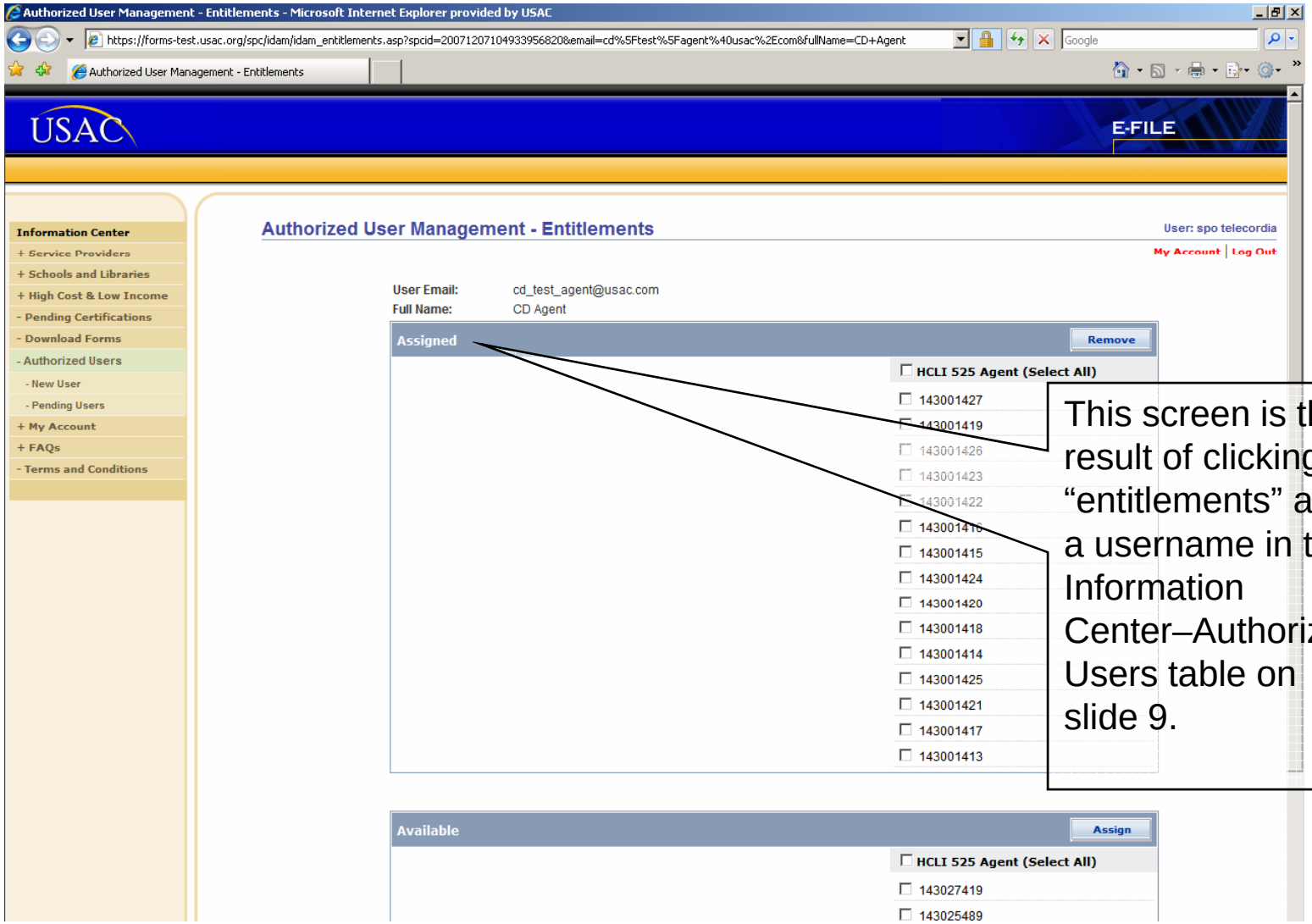


This screen is the result of clicking on an email address in the Information Center–Authorized Users table on slide 9.

DeActivate removes ALL association with your SPINs. A dialog box will appear asking you to confirm this choice. To edit individual or multiple (but not all) associations, please see the next slide.

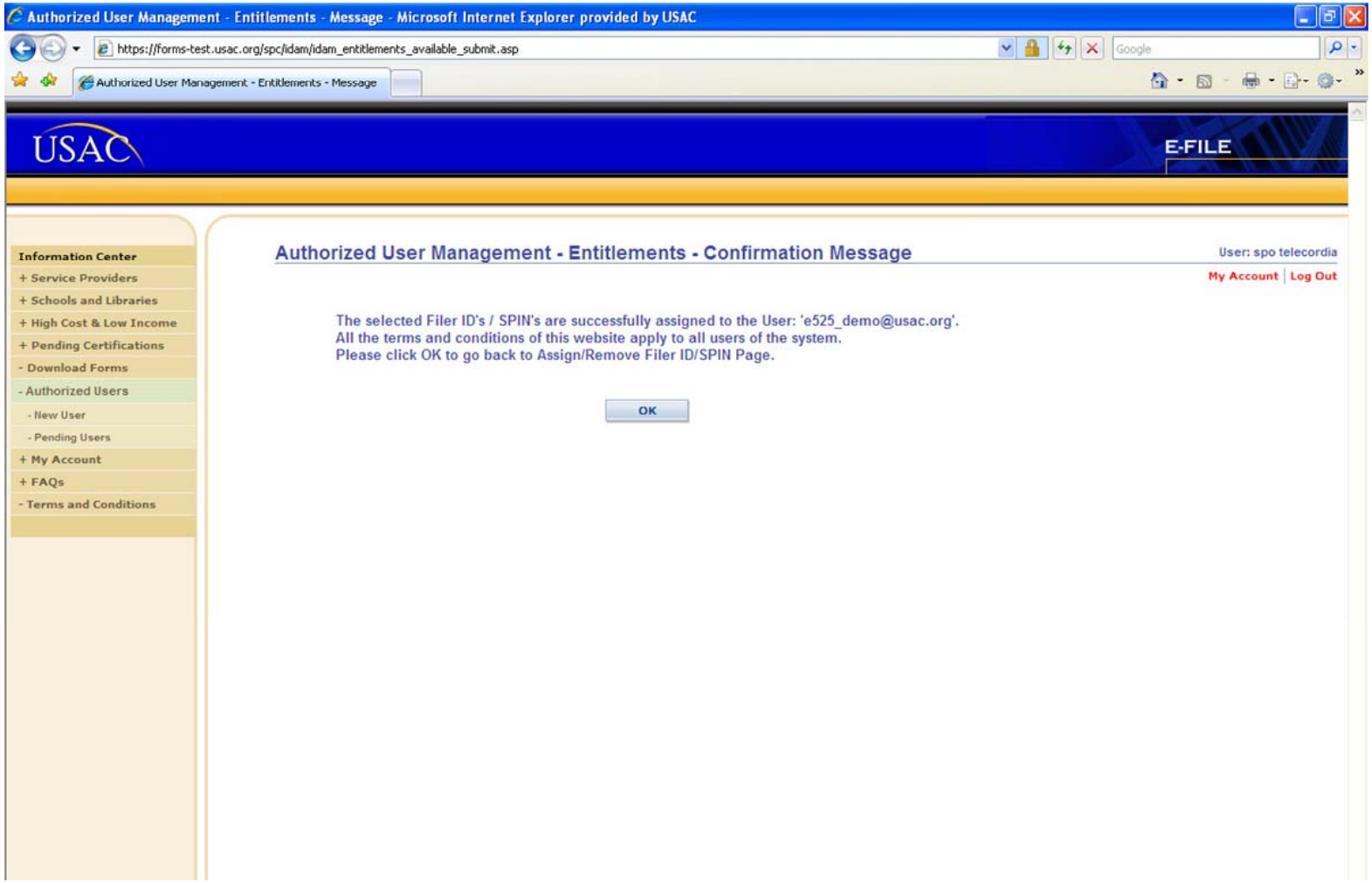
Reset cancels any edits made to the information fields, returning to what was last Saved.

E-File:
Authorized User Management – Modify Entitlements

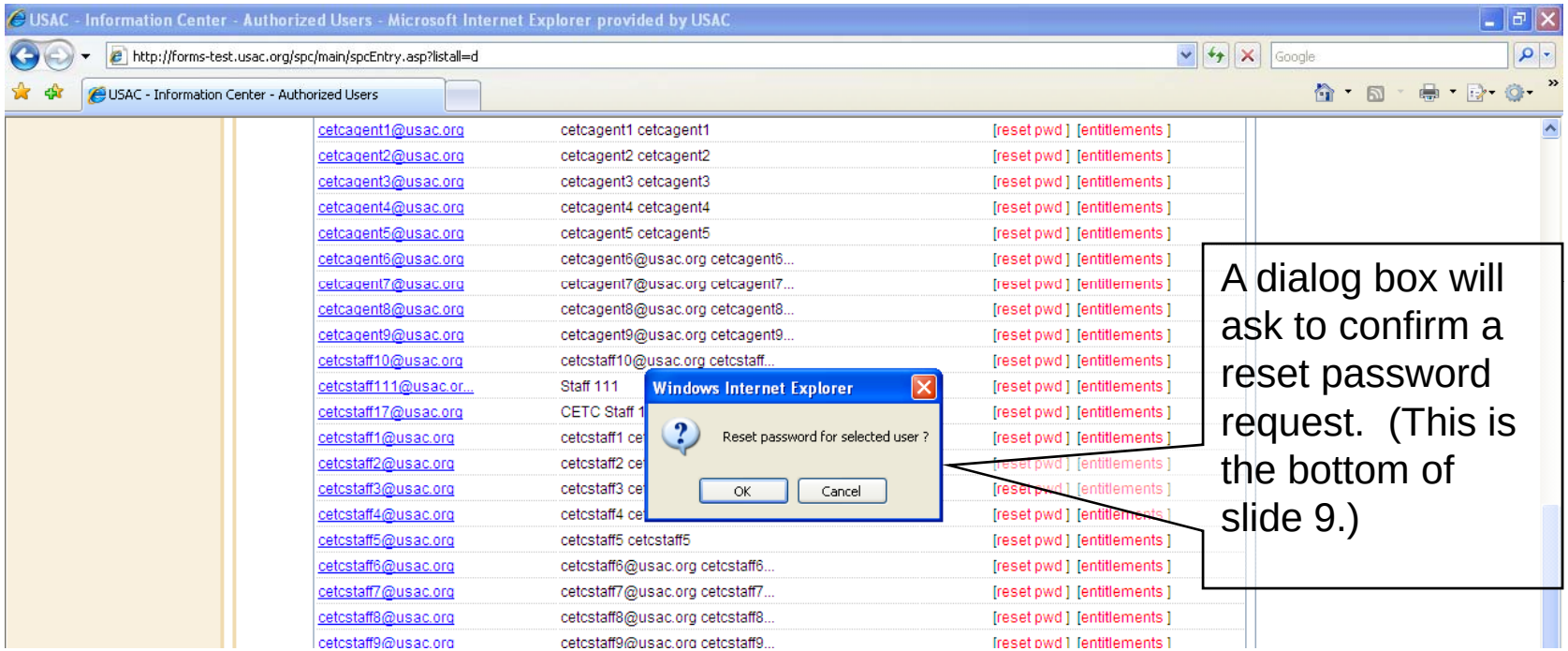


This screen is the result of clicking "entitlements" after a username in the Information Center–Authorized Users table on slide 9.

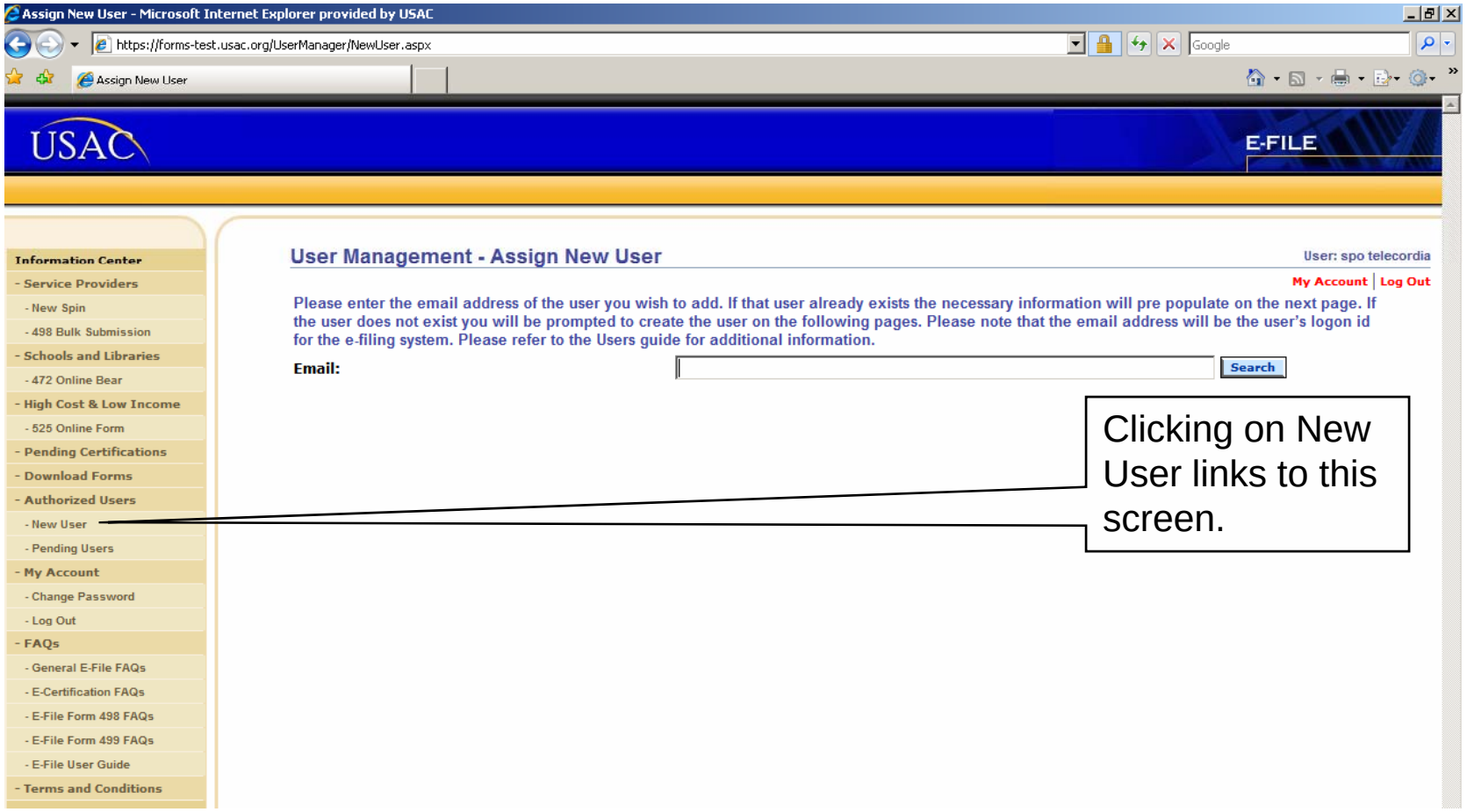
E-File:
Authorized User Management – Confirmation of New Entitlement



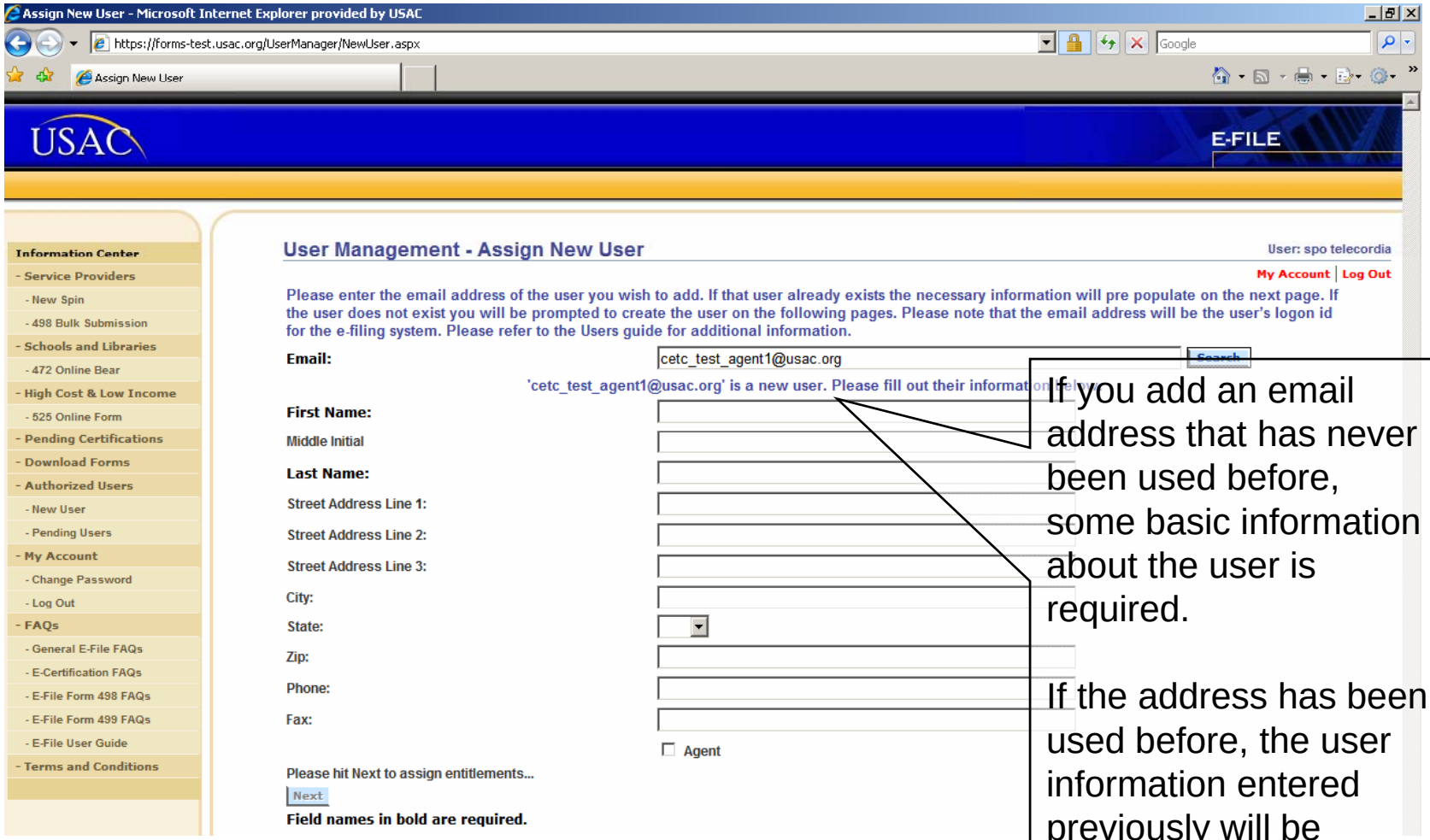
E-File:
User Password Reset by List



E-File:
New Authorized User



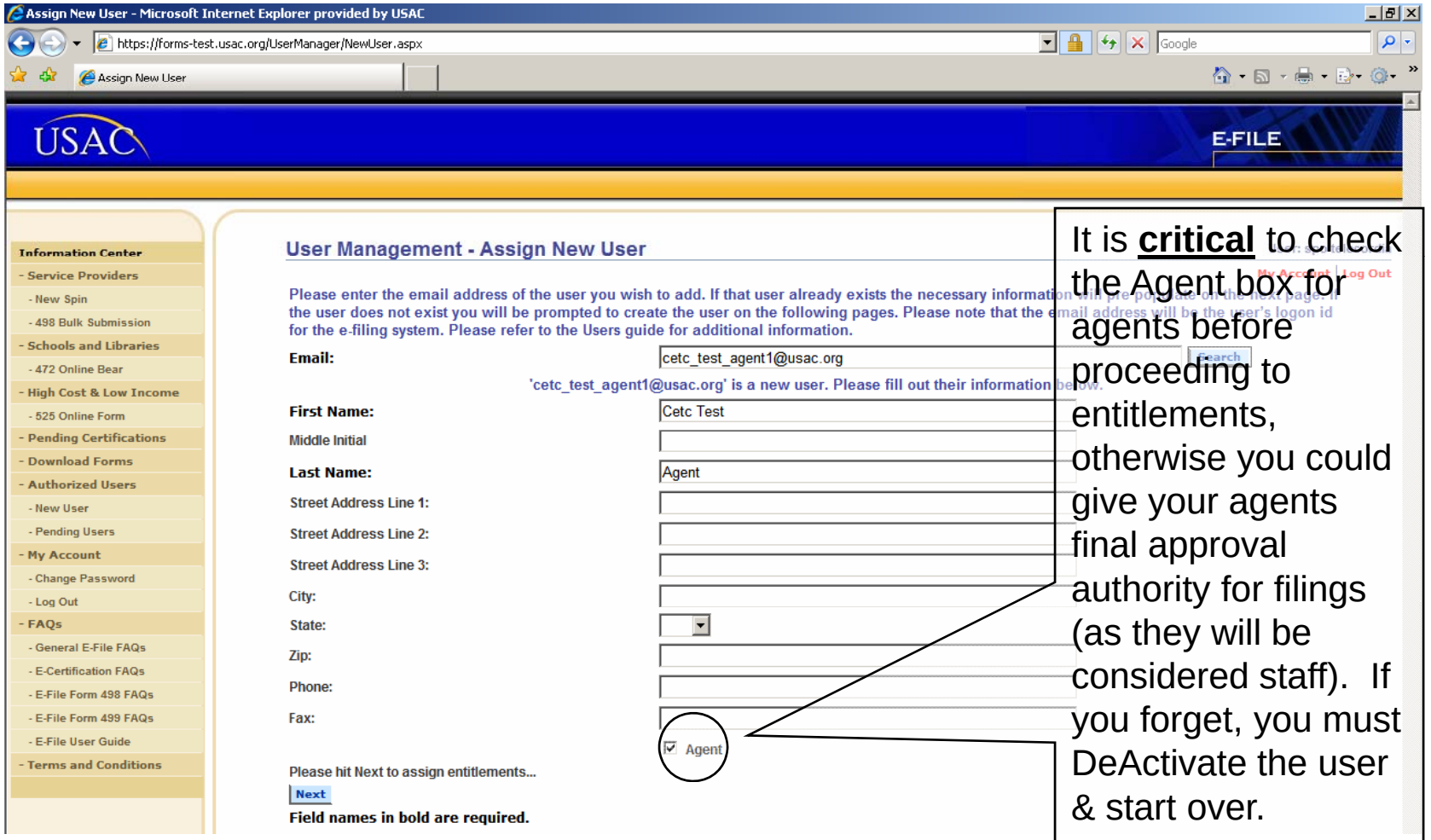
E-File:
New Authorized User – Not in System



If you add an email address that has never been used before, some basic information about the user is required.

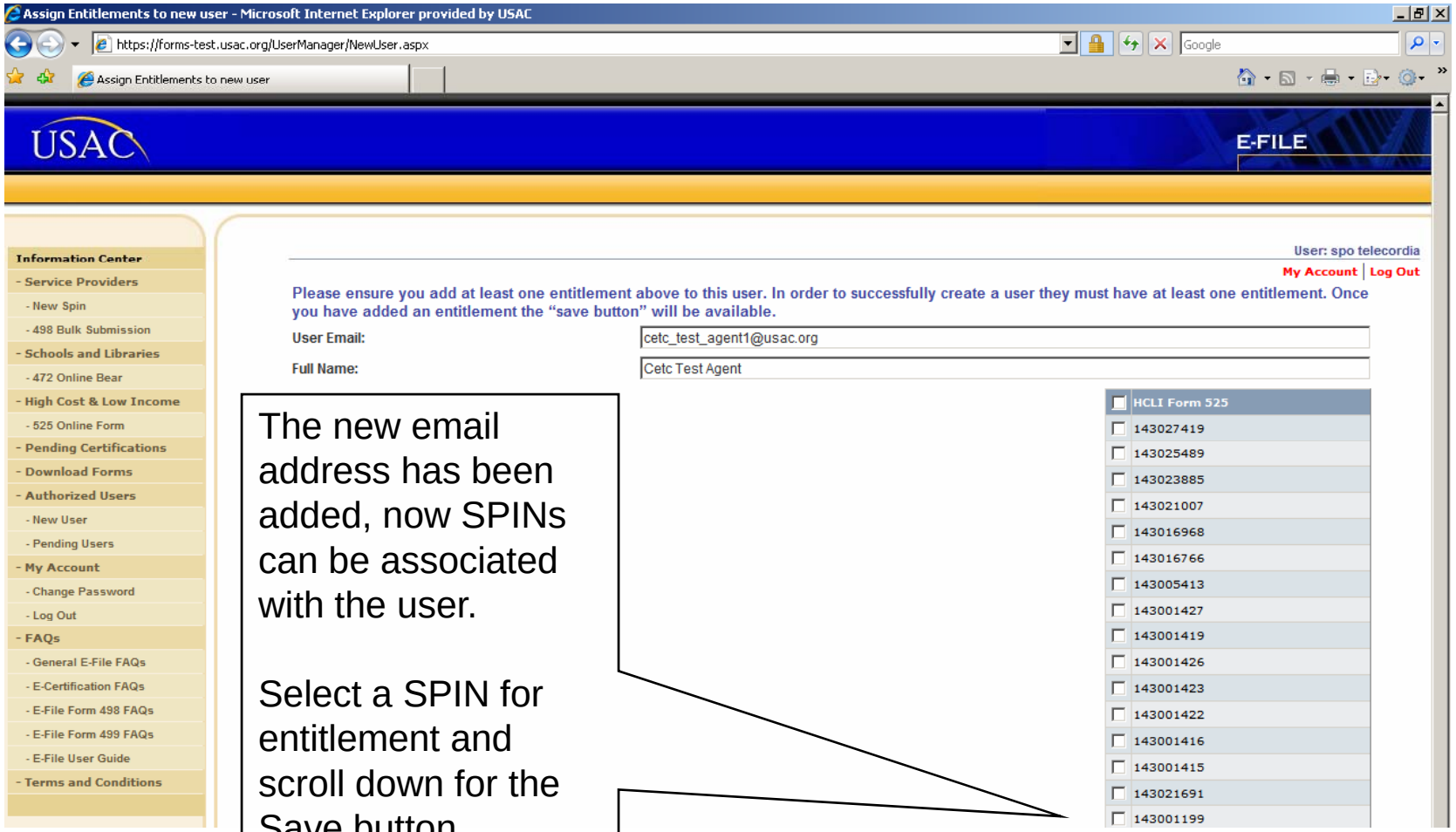
If the address has been used before, the user information entered previously will be displayed.

E-File:
New Authorized User – Not in System



It is **critical** to check the Agent box for agents before proceeding to entitlements, otherwise you could give your agents final approval authority for filings (as they will be considered staff). If you forget, you must DeActivate the user & start over.

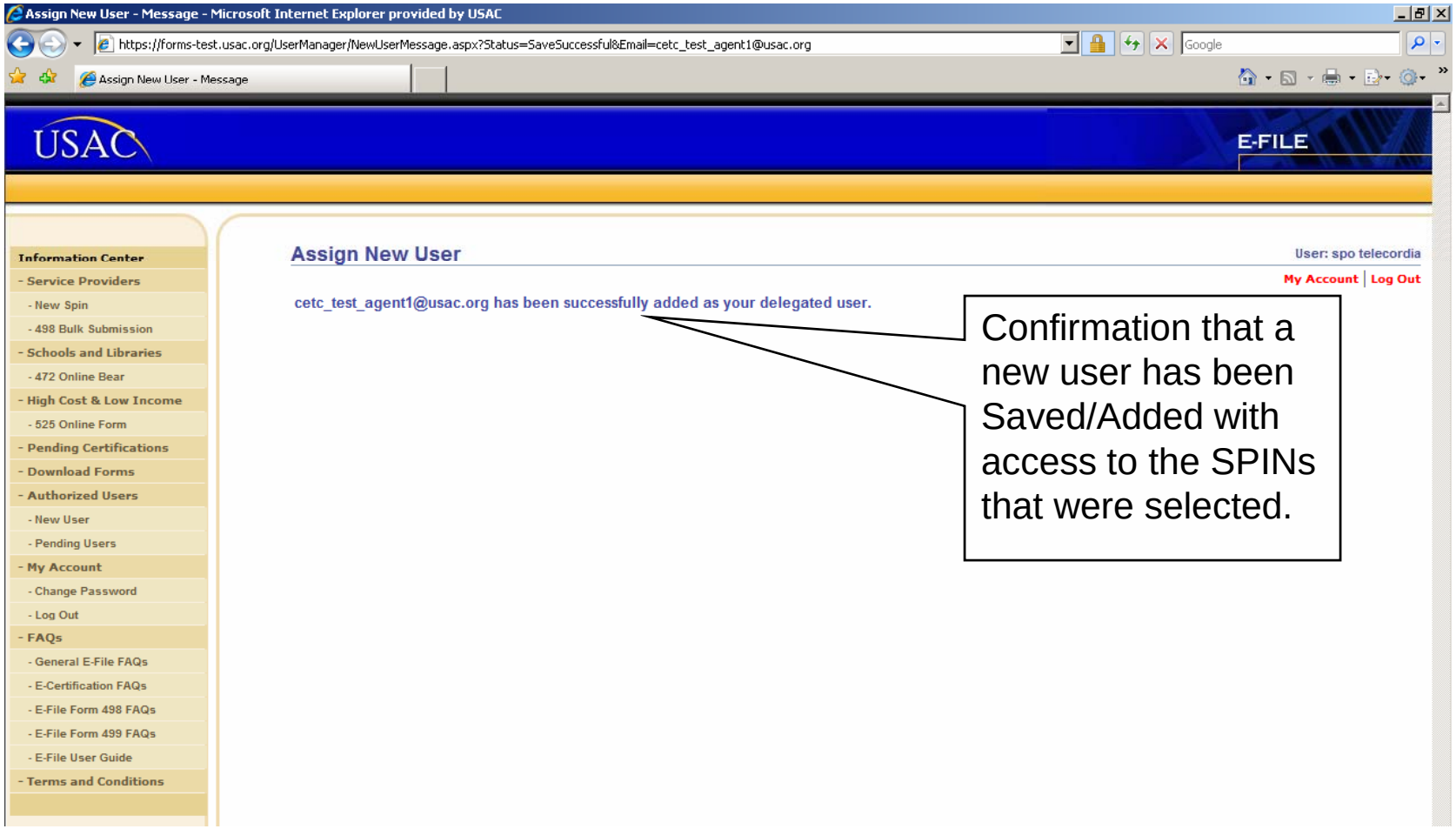
E-File:
New Authorized User – Not in System



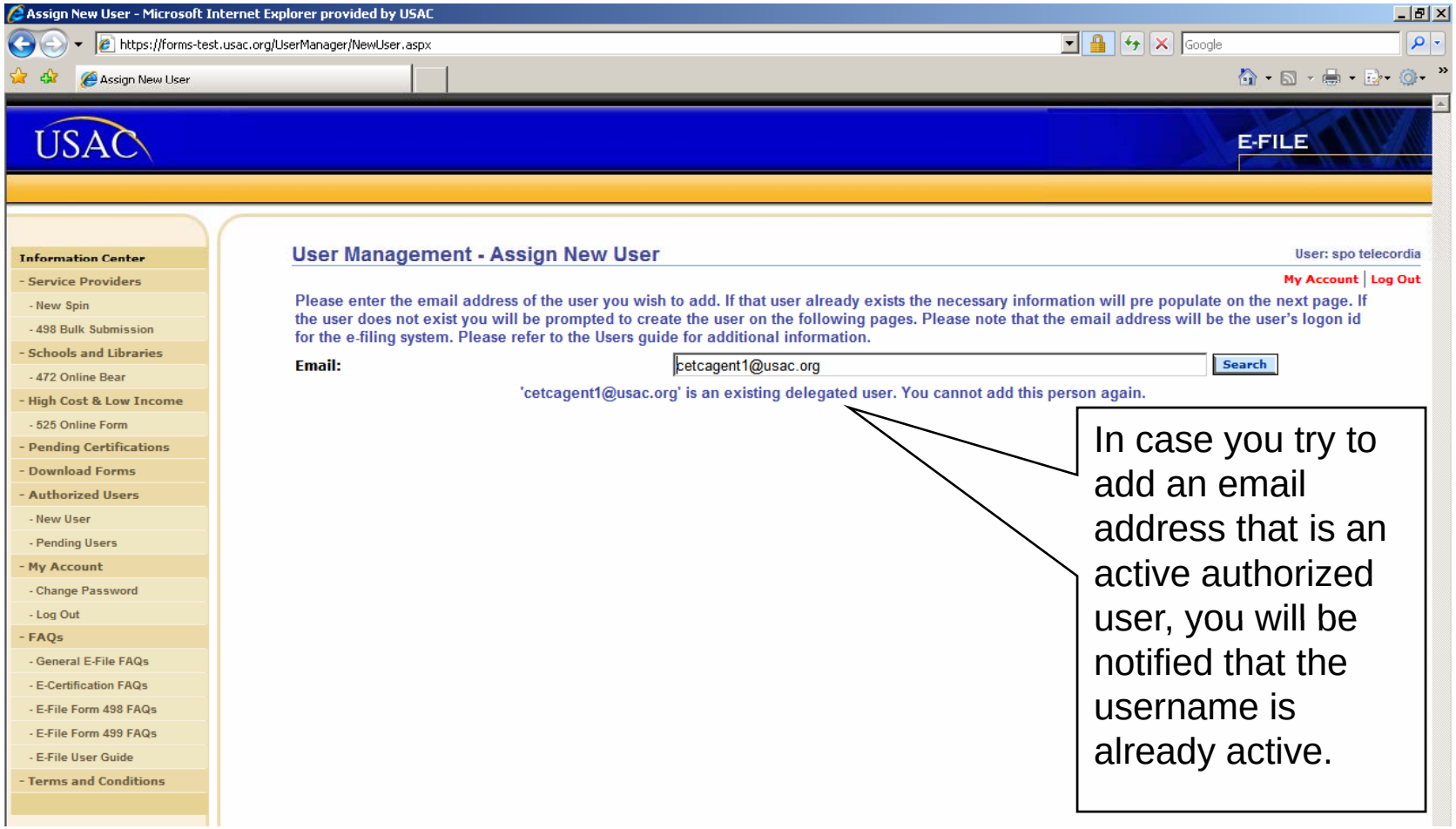
The new email address has been added, now SPINs can be associated with the user.

Select a SPIN for entitlement and scroll down for the Save button.

E-File:
New Authorized User – Not in System

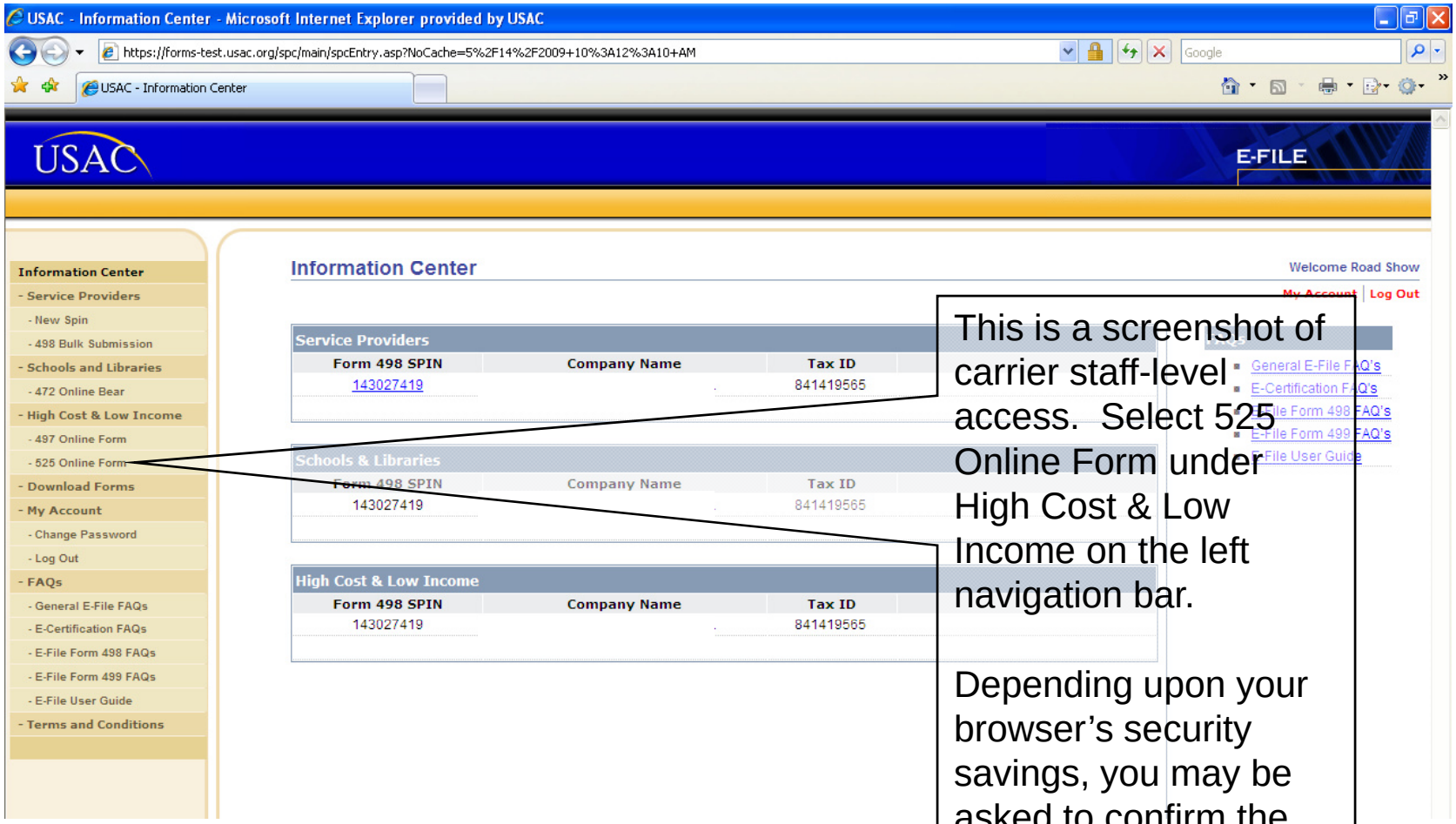


E-File:
New Authorized User – Exists in System



II. Introducing Form 525 Online

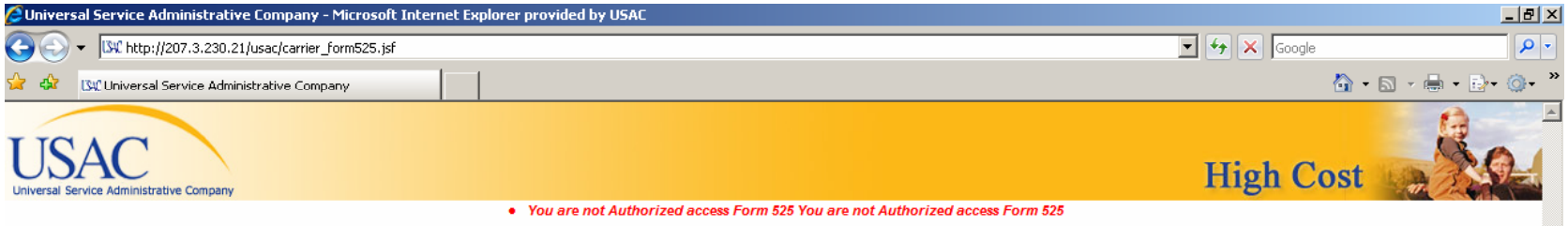
Online Form 525
Click-thru to e525 from E-File



This is a screenshot of carrier staff-level access. Select 525 Online Form under High Cost & Low Income on the left navigation bar.

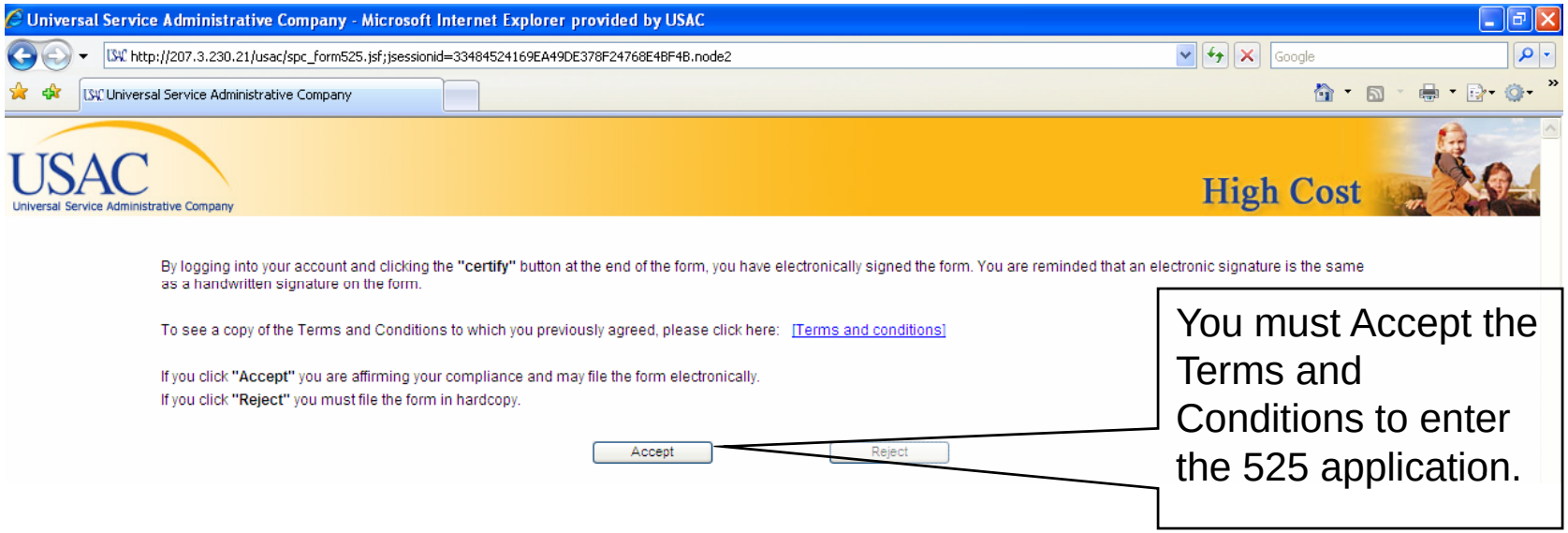
Depending upon your browser's security savings, you may be asked to confirm the link (via dialog box).

Online Form 525
Click-thru Failure

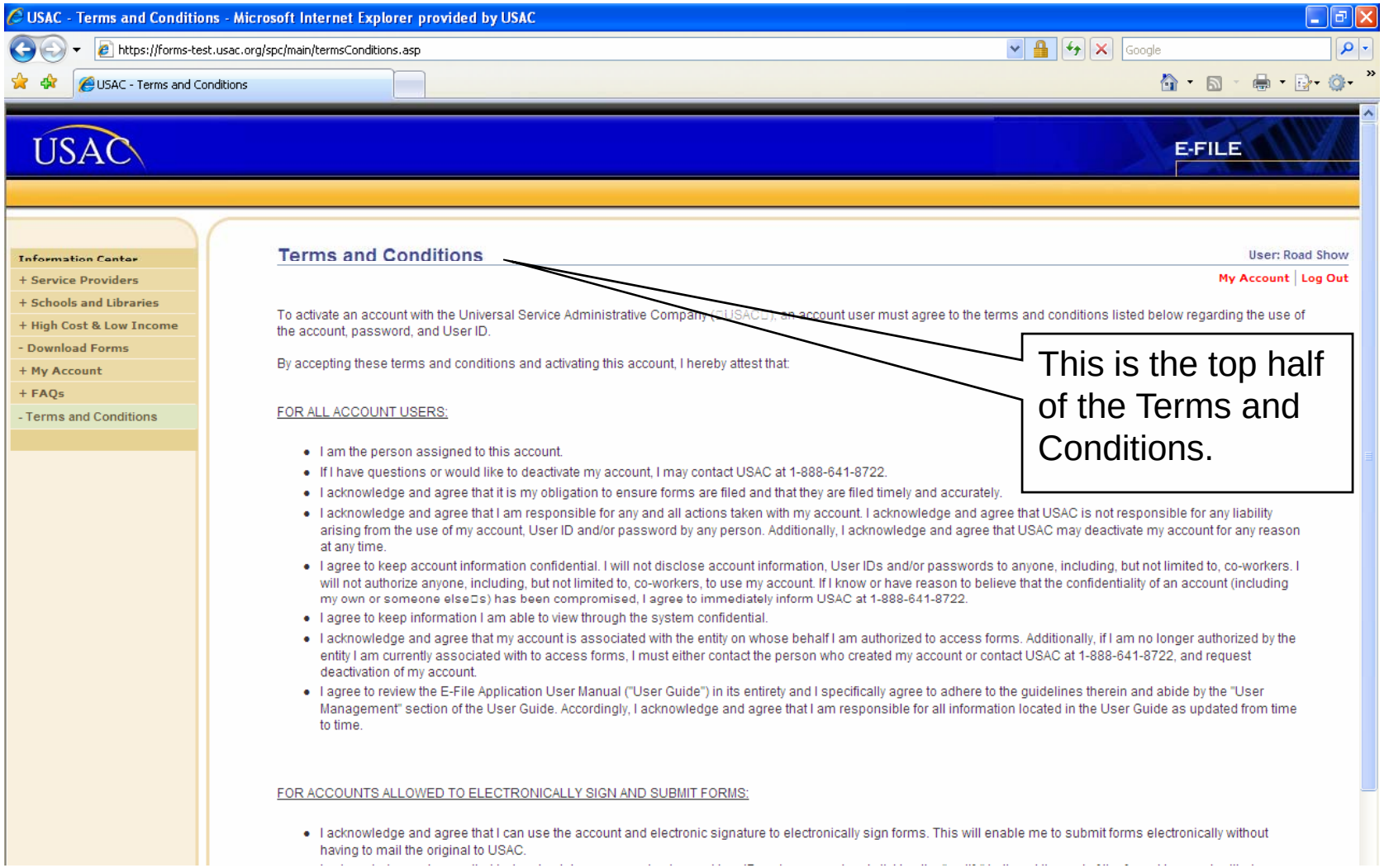


If your e-File username has no 525 Online Form authorization, you cannot be authenticated and will receive this message.

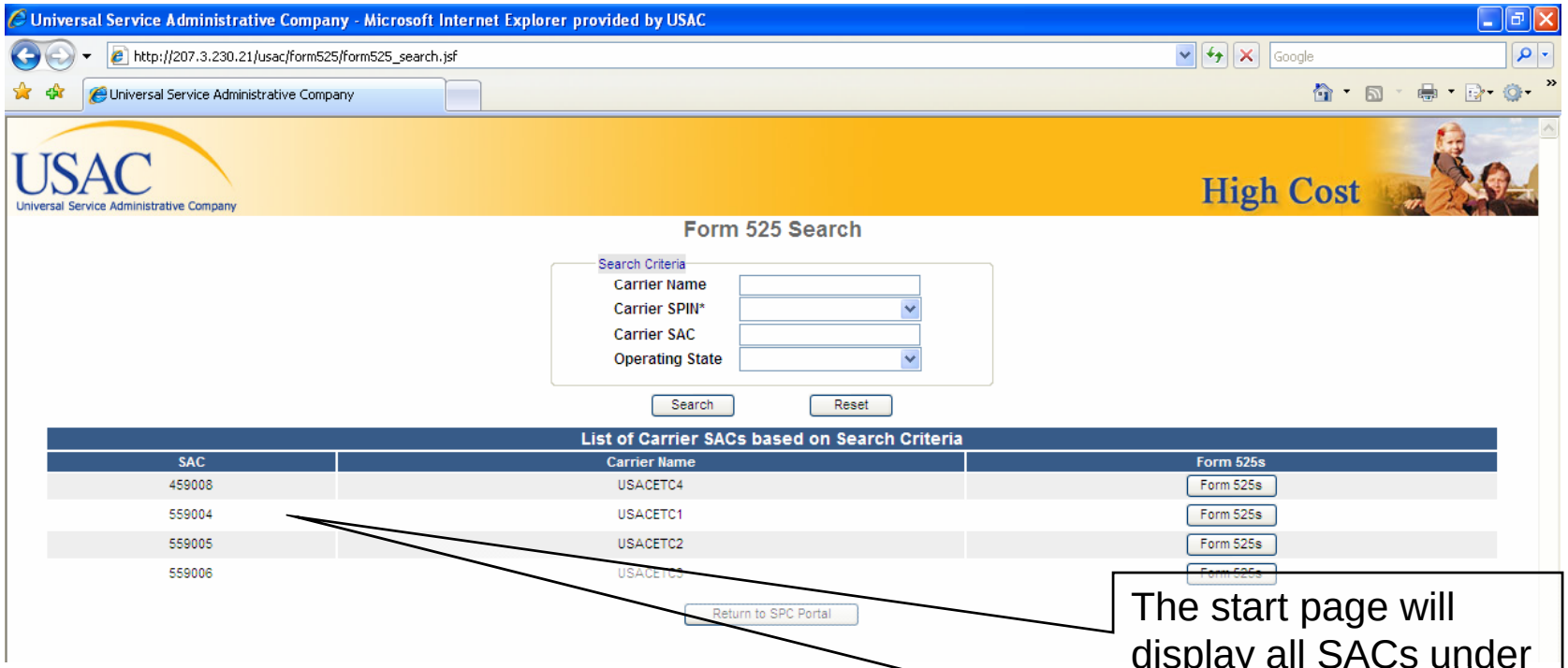
Online Form 525
Click-thru Success – Disclaimer



Online Form 525
Click-thru Success – Terms and Conditions



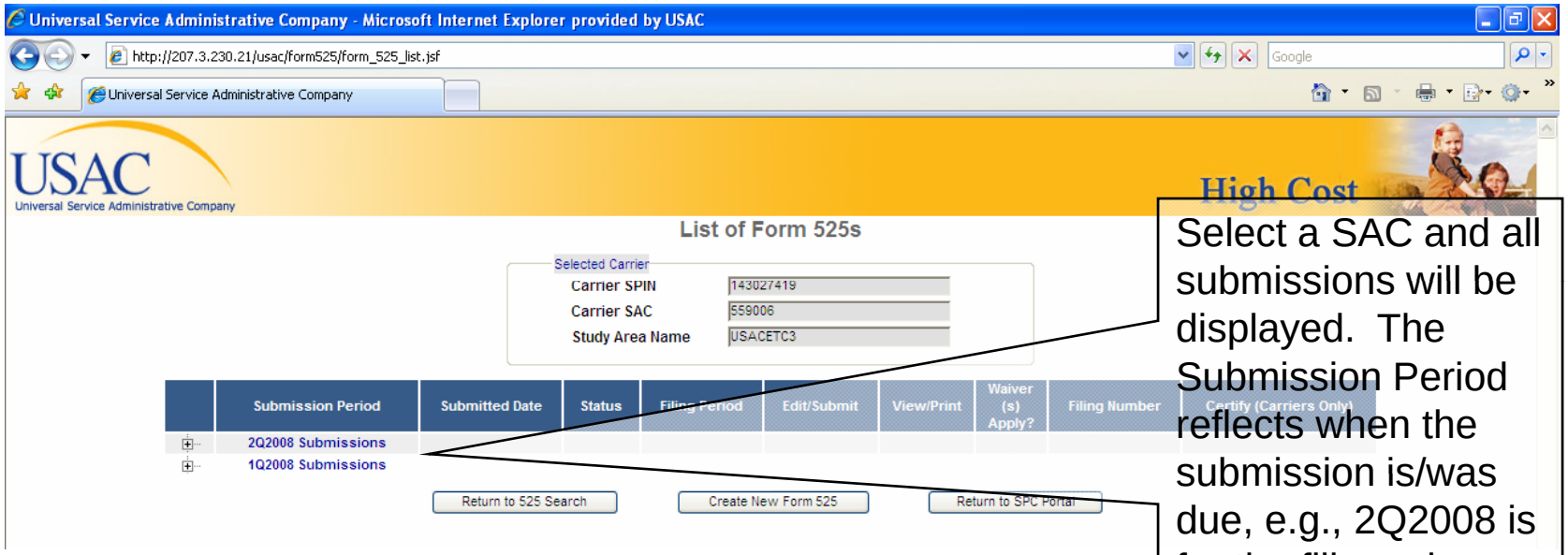
Online Form 525
e525 Start Page – Multiple SAC Display



The start page will display all SACs under the SPINs associated with your E-File login.

You can filter the SAC list by several criteria.

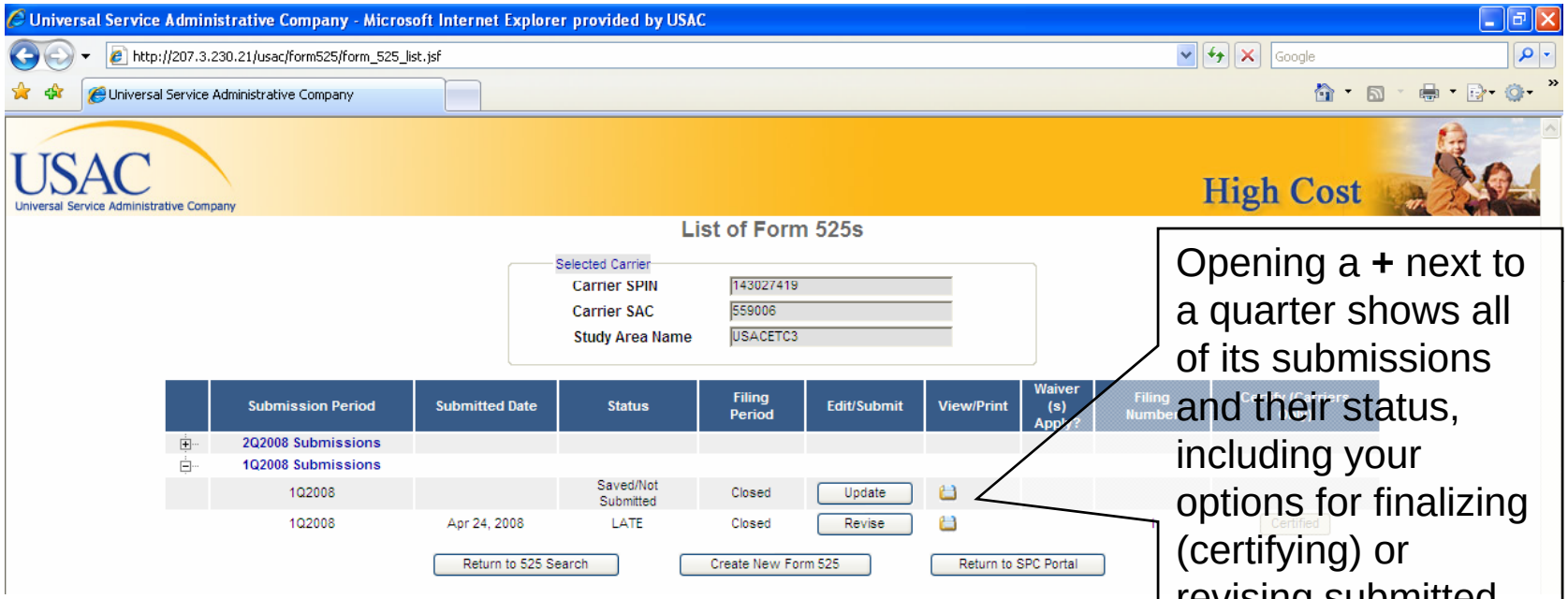
Online Form 525
Individual SAC View



Select a SAC and all submissions will be displayed. The Submission Period reflects when the submission is/was due, e.g., 2Q2008 is for the filings due June 30, 2008.

You may review previously saved/ submitted filings or create a new Form 525.

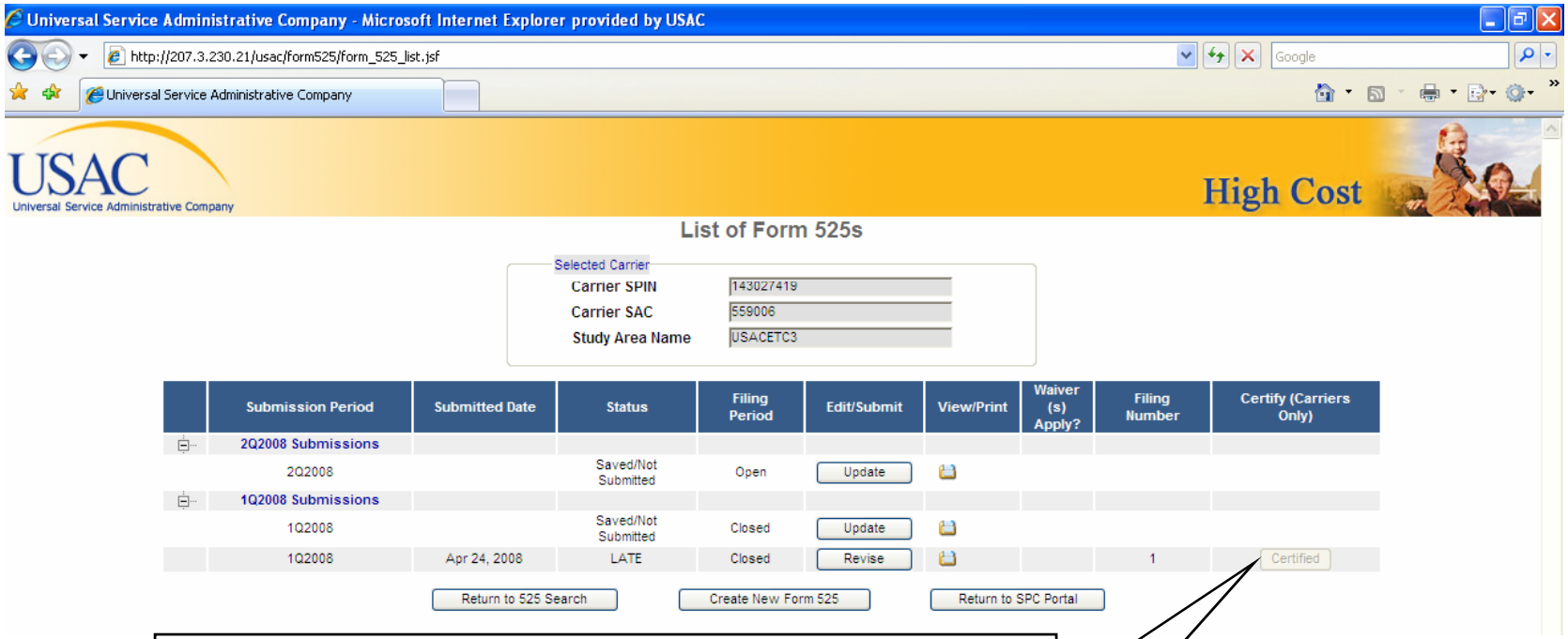
Online Form 525
Expanded Filing Detail



Opening a **+** next to a quarter shows all of its submissions and their status, including your options for finalizing (certifying) or revising submitted data.

Multiple time periods may be displayed concurrently…

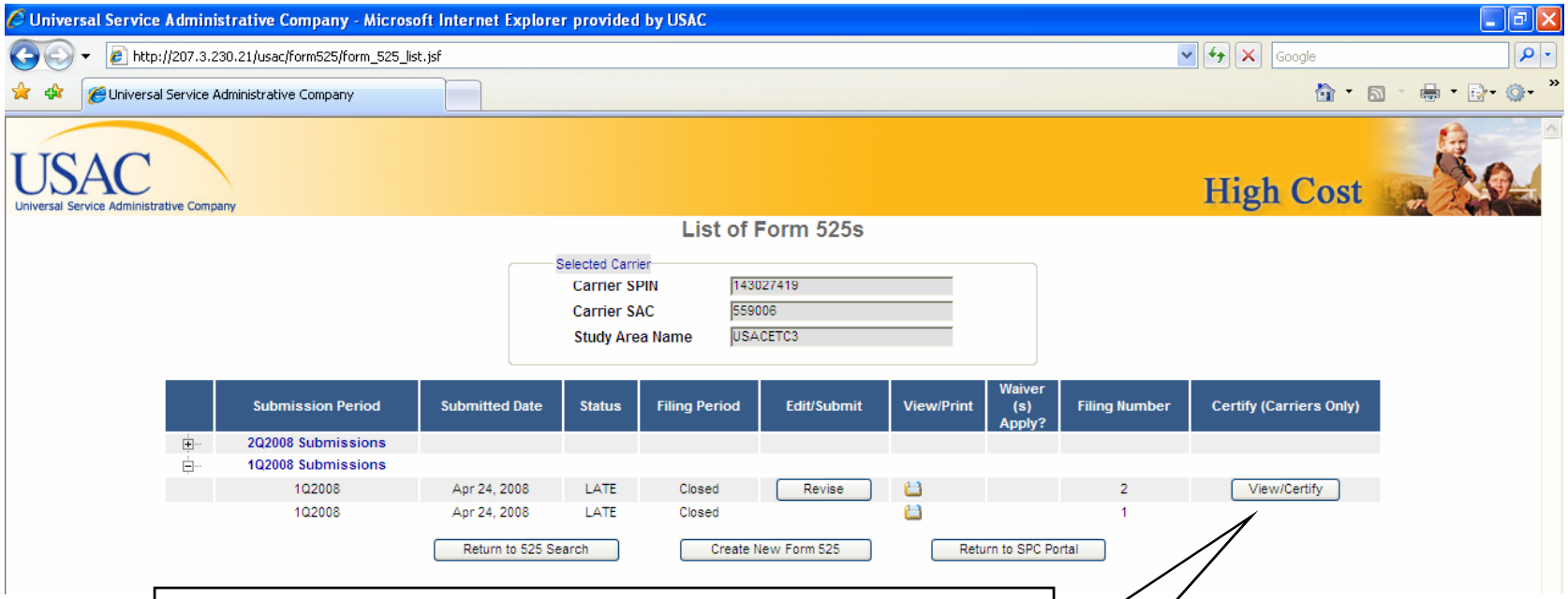
Online Form 525
Expanded Filing Detail



You can see here that the 1Q08 submission has been filed (late) because the Certify button is grayed-out. An update has been started, but not Submitted so it has no Filing Number.

Similarly, the 2Q08 filing has been started, but not Submitted.

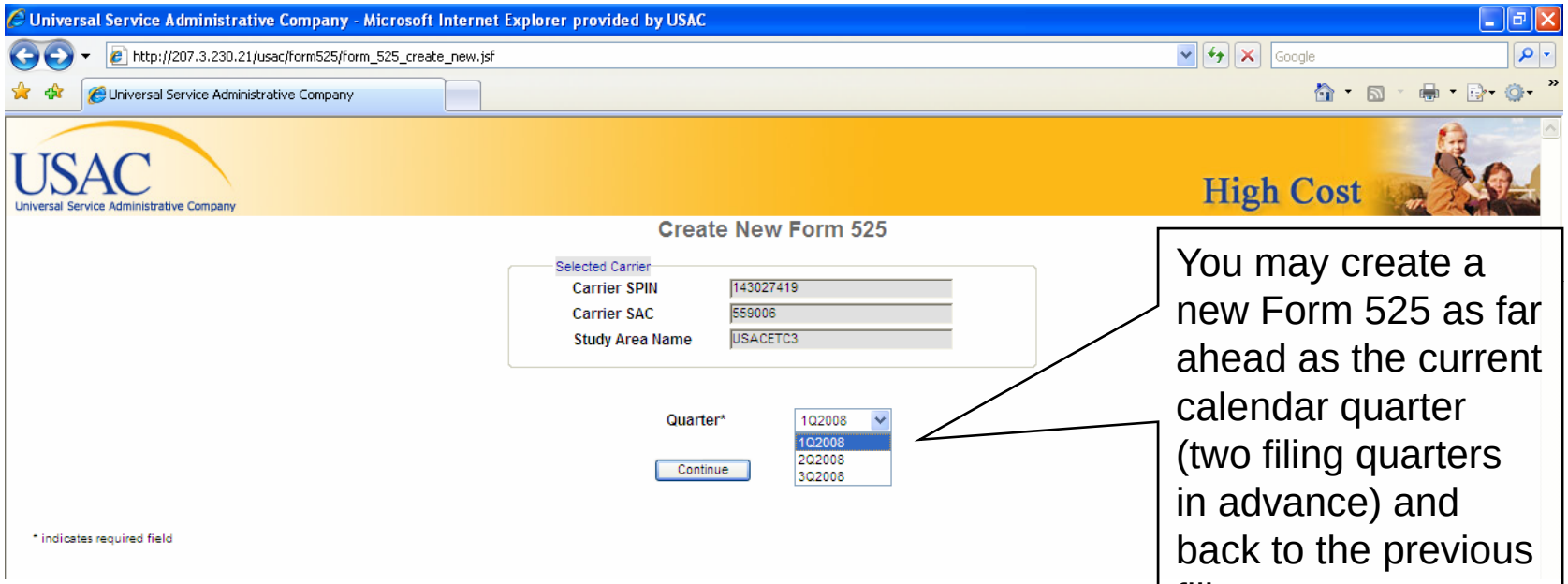
Online Form 525
Expanded Filing Detail



Here, the 1Q08 update has been filed by an agent, and the carrier representative must Certify it for it to be considered Submitted (slide 45).

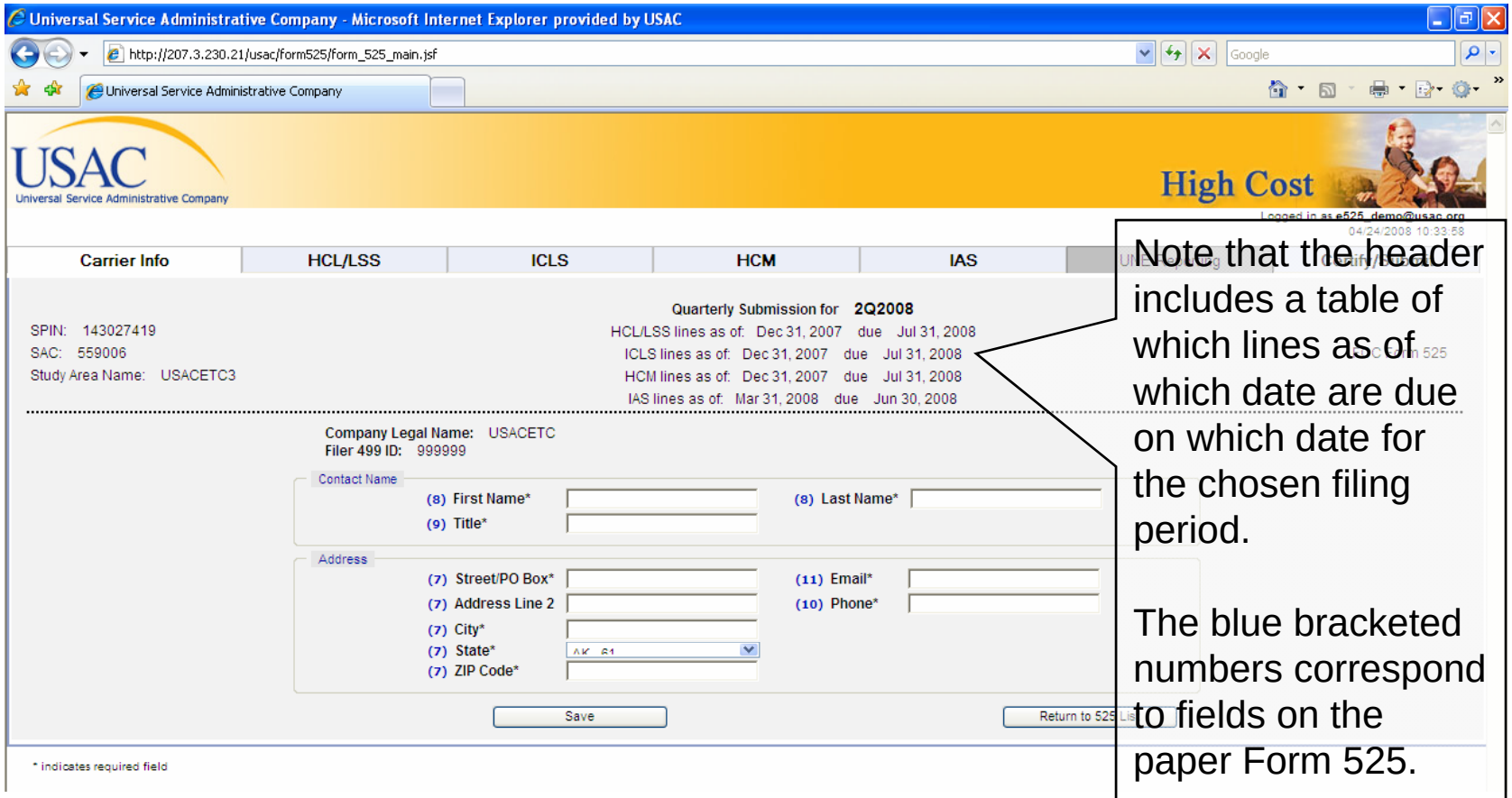
If there are changes to be made, the carrier can use the Revise button.

Online Form 525
New Filing – Form 525 Creation



You may create a new Form 525 as far ahead as the current calendar quarter (two filing quarters in advance) and back to the previous filing quarter.

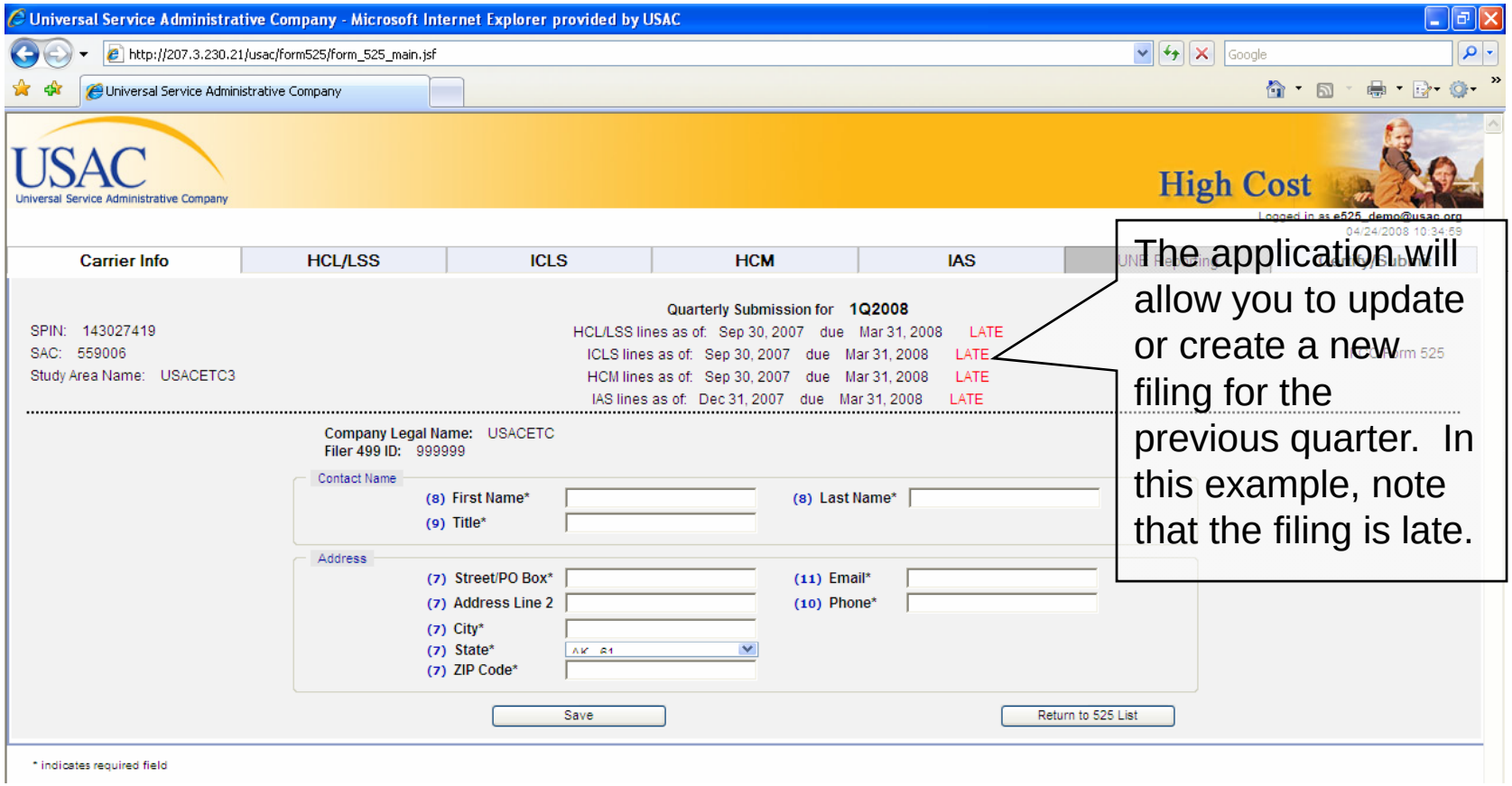
Online Form 525
New Filing – Carrier Info Page



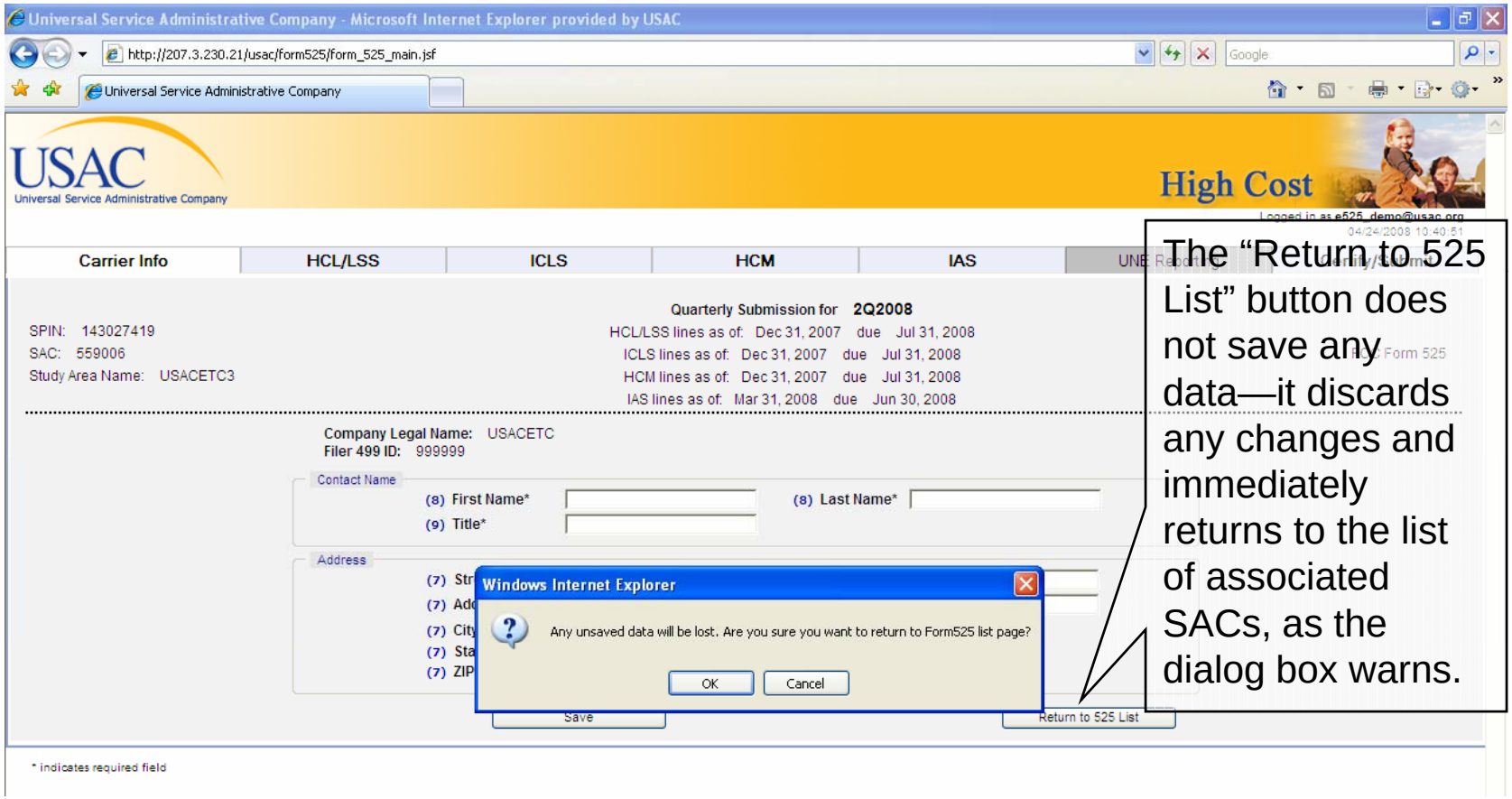
Note that the header includes a table of which lines as of which date are due on which date for the chosen filing period.

The blue bracketed numbers correspond to fields on the paper Form 525.

Online Form 525
New Filing – Carrier Info Page

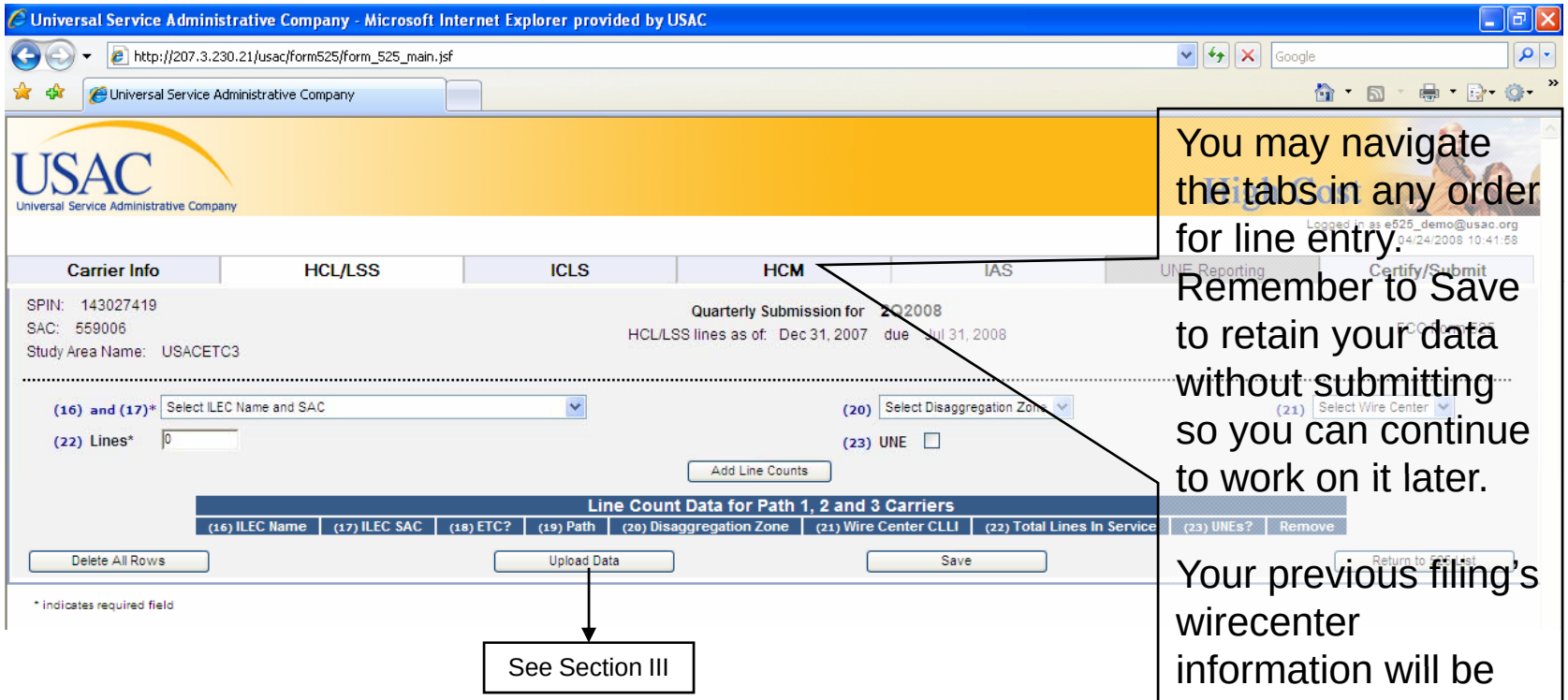


Online Form 525
“Return to 525 List” = Do Not Save



The “Return to 525 List” button does not save any data—it discards any changes and immediately returns to the list of associated SACs, as the dialog box warns.

Online Form 525
New Filing – HCL/LSS Page

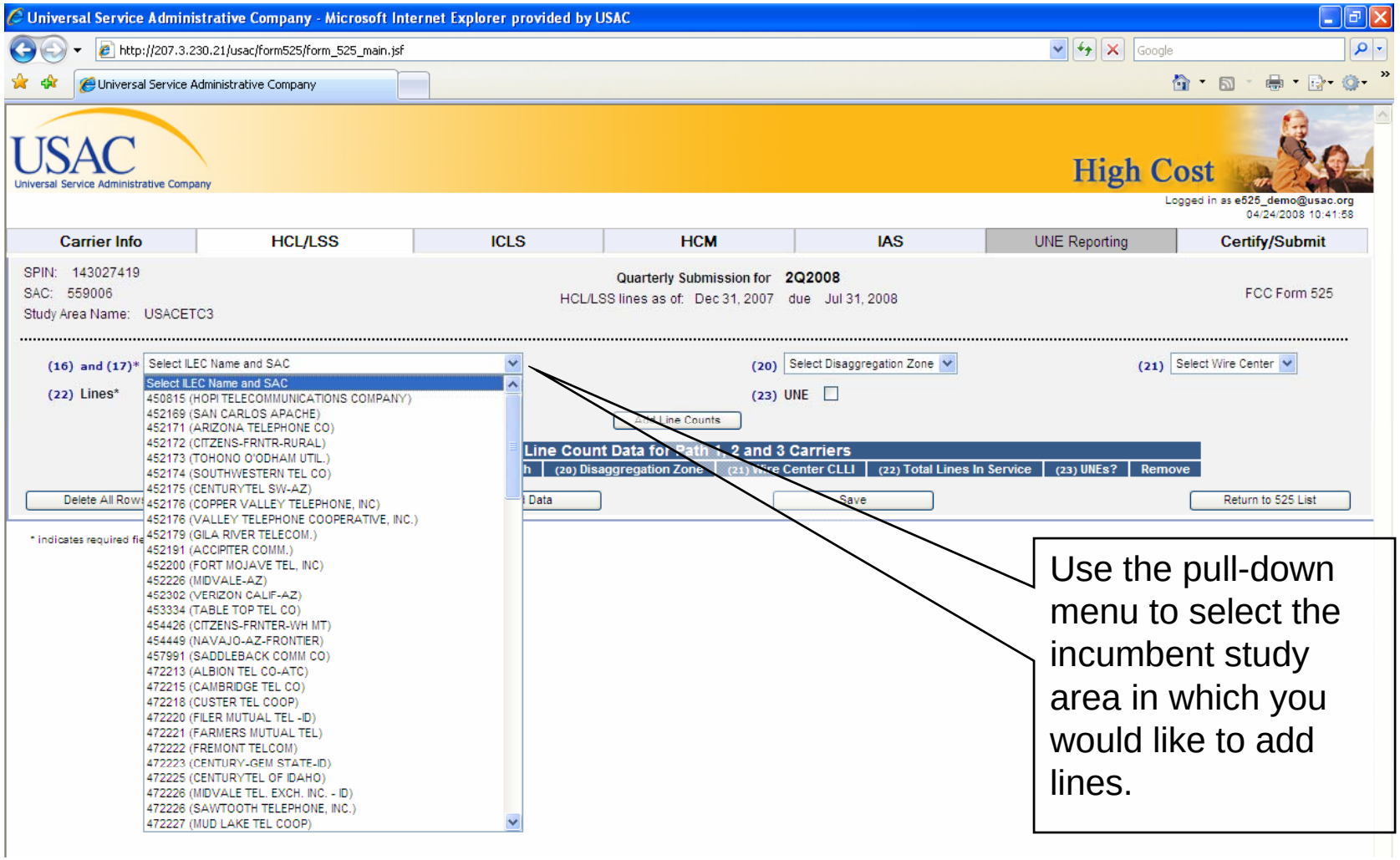


You may navigate the tabs in any order for line entry.

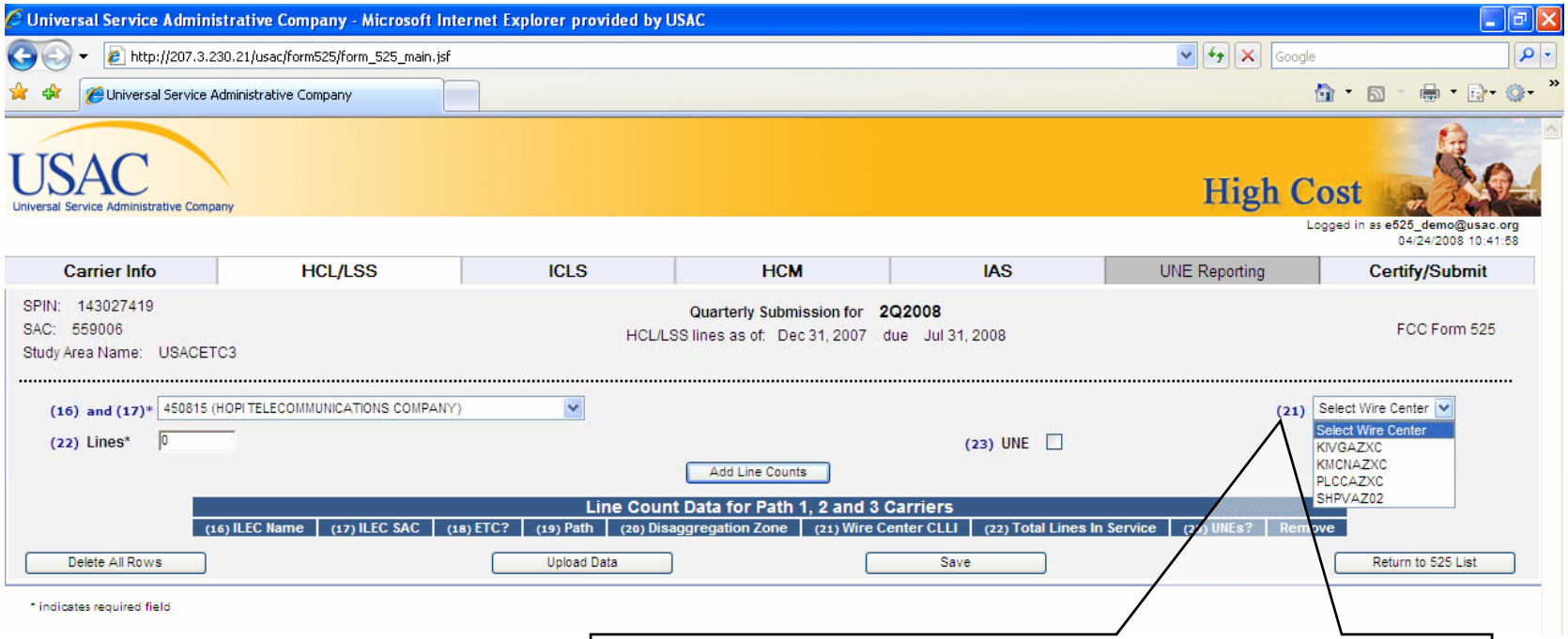
Remember to Save to retain your data without submitting so you can continue to work on it later.

Your previous filing's wirecenter information will be presented with (editable) blank line counts—this is a new test carrier, so there is no data.

Online Form 525
New Filing – HCL/LSS Page, ILEC Pull-down

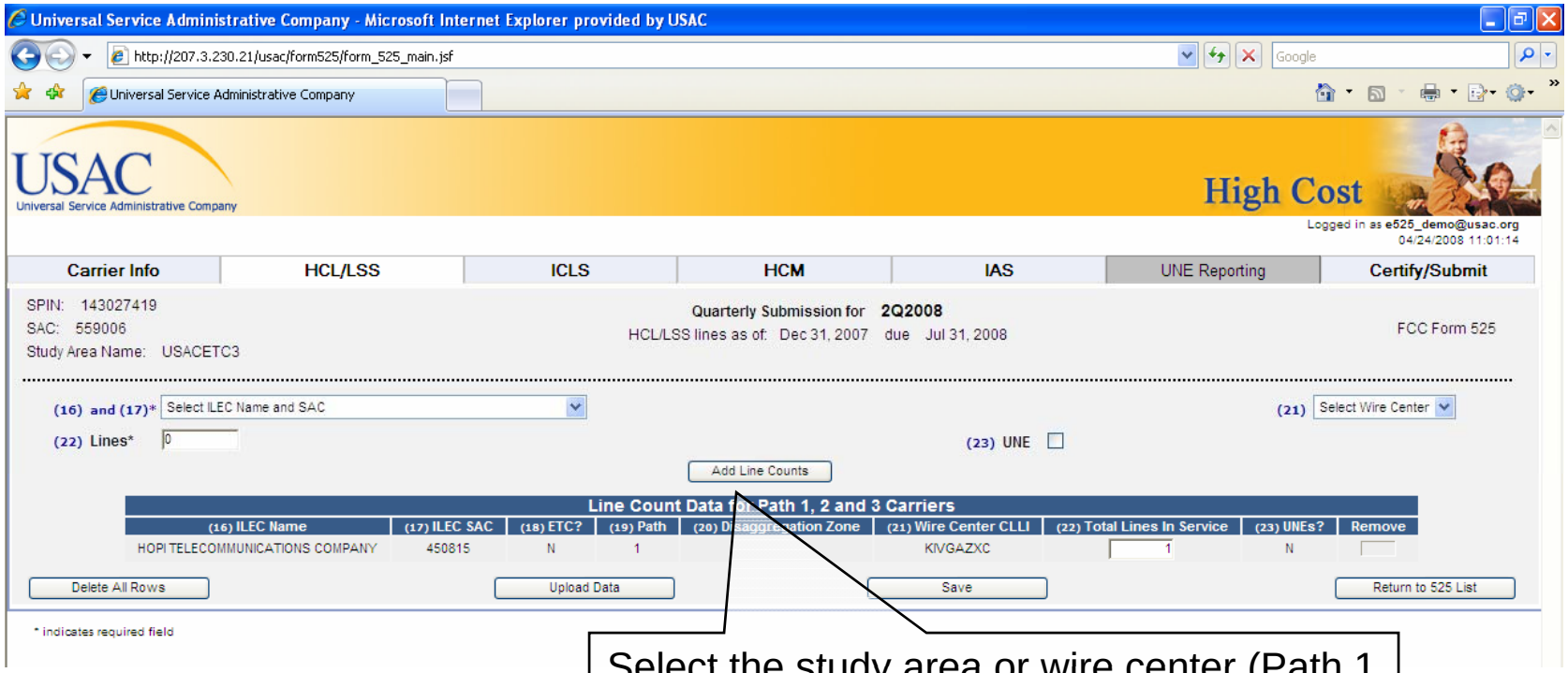


Online Form 525
New Filing – HCL/LSS Page, Wire Center



Wait for the new ILEC-specific information to load on the page. You will be presented with wire center information for the ILEC if Path 1 disaggregation, or Zones if Path 2 or 3.

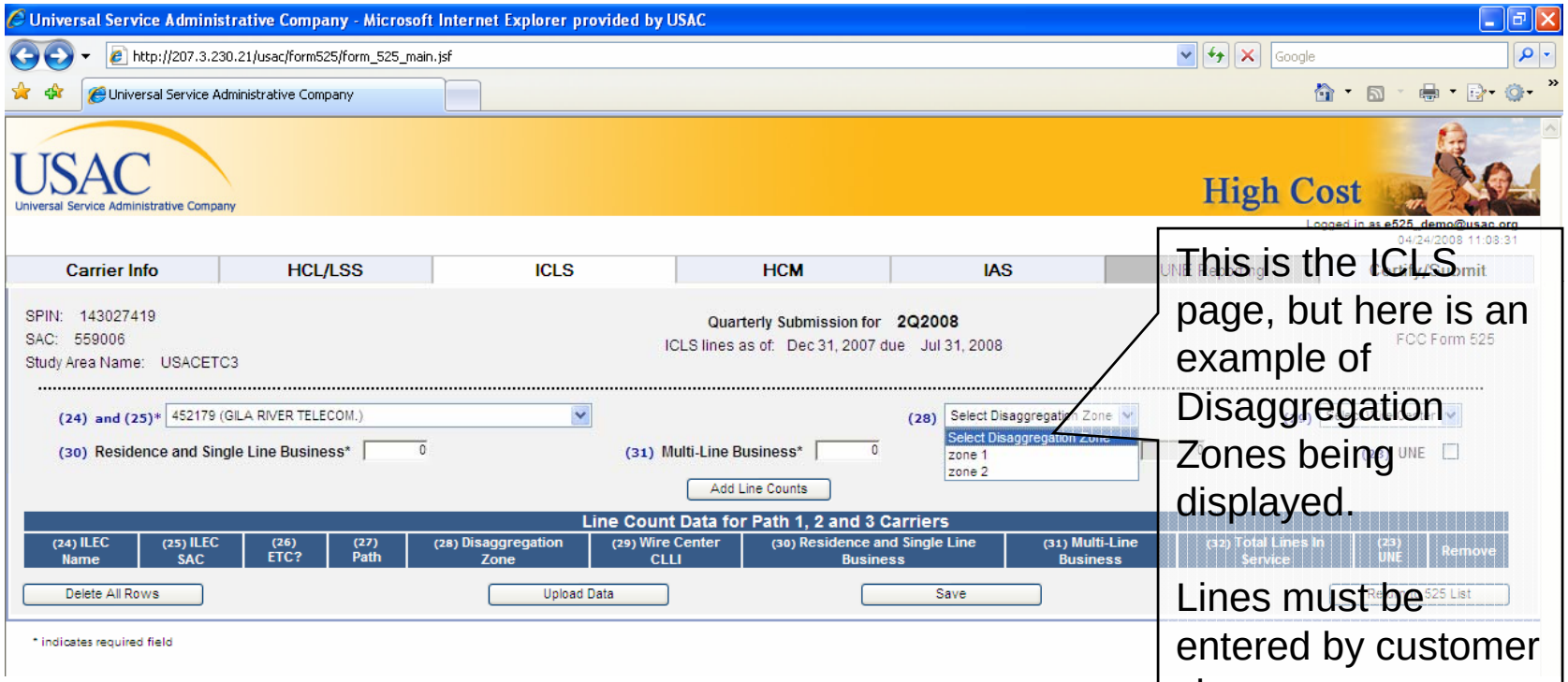
Online Form 525
New Filing – HCL/LSS Page, Line Count Added



Select the study area or wire center (Path 1 in this example), let the data load, enter the number of lines, and “Add Line Counts.”

The new line count is then displayed.

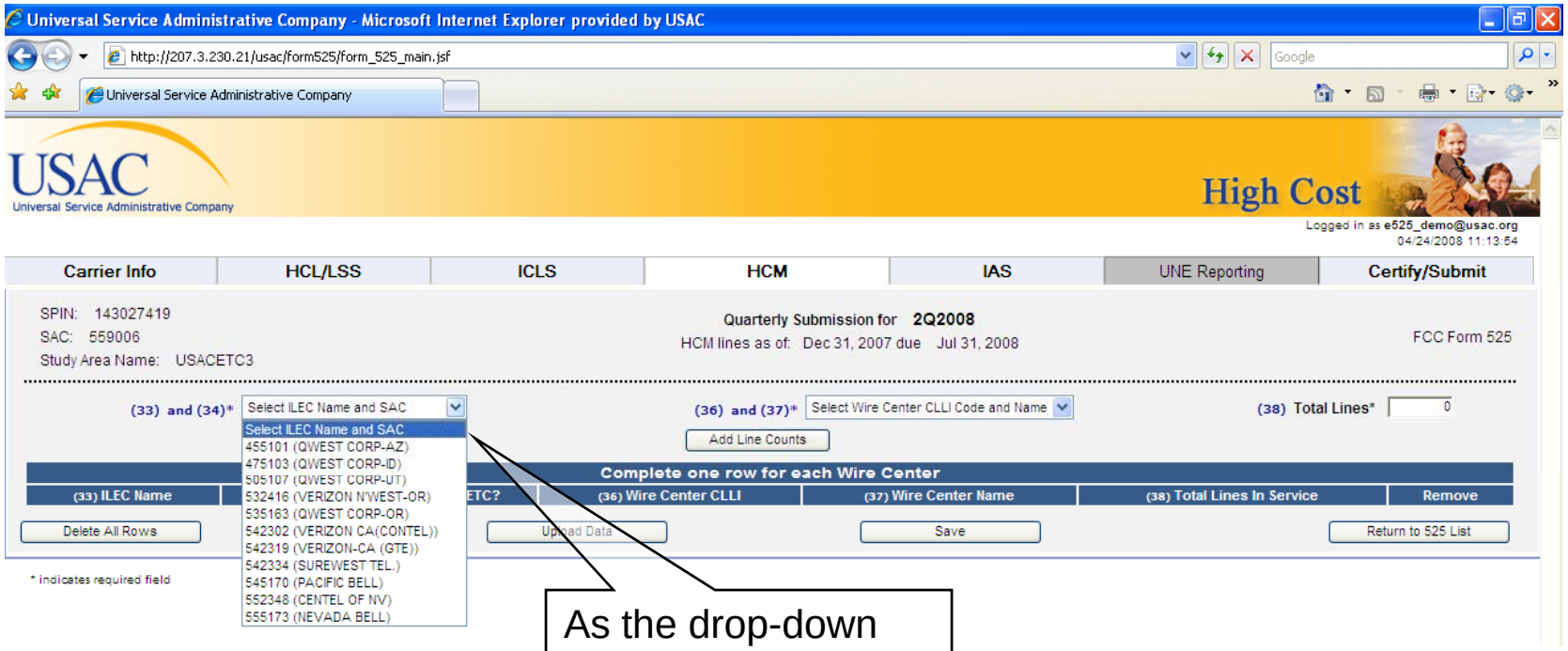
Online Form 525
New Filing – ICLS Page, Disaggregation Zones



This is the ICLS page, but here is an example of Disaggregation Zones being displayed.

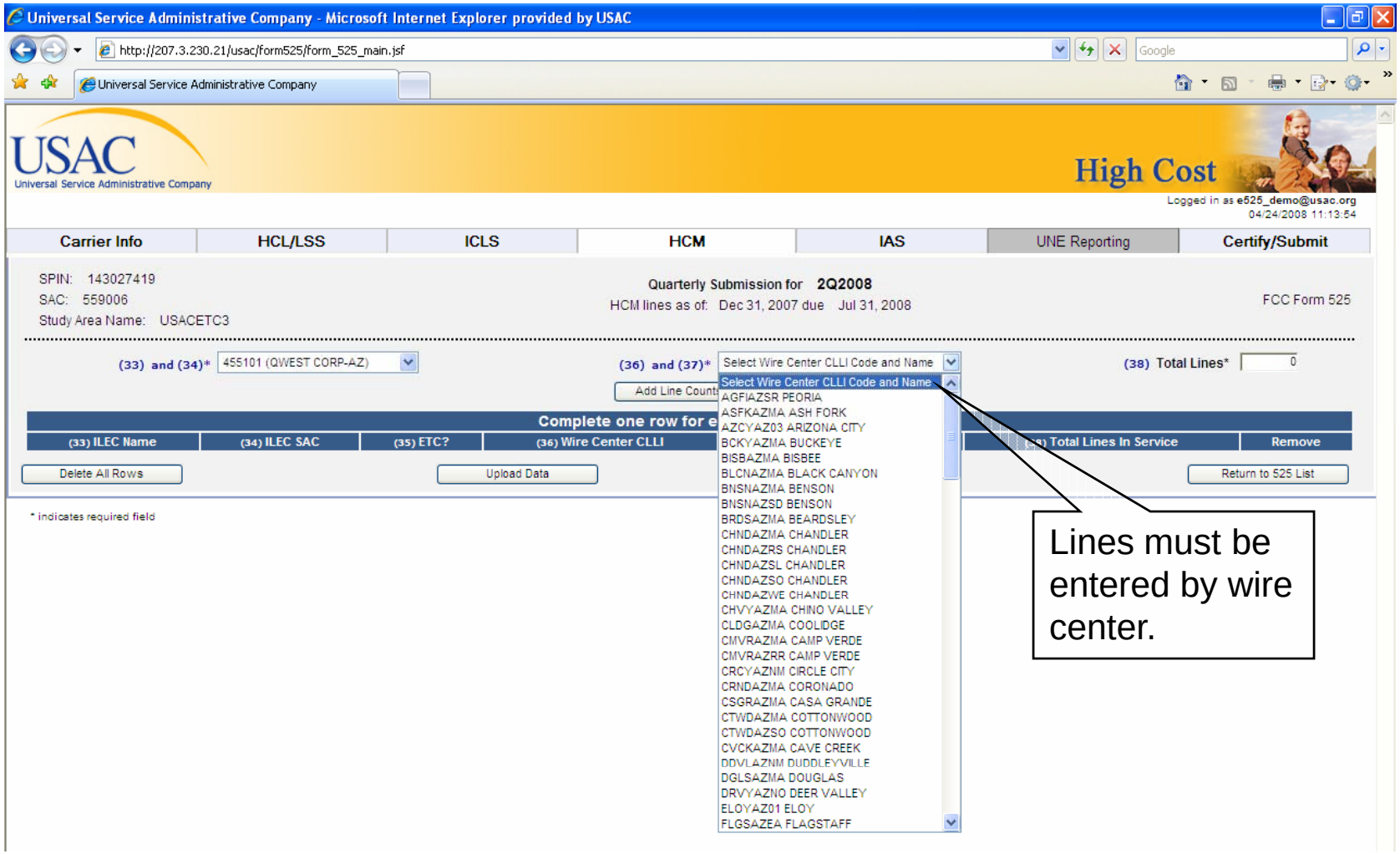
Lines must be entered by customer class.

Online Form 525
New Filing – HCM Page, ILEC Choice

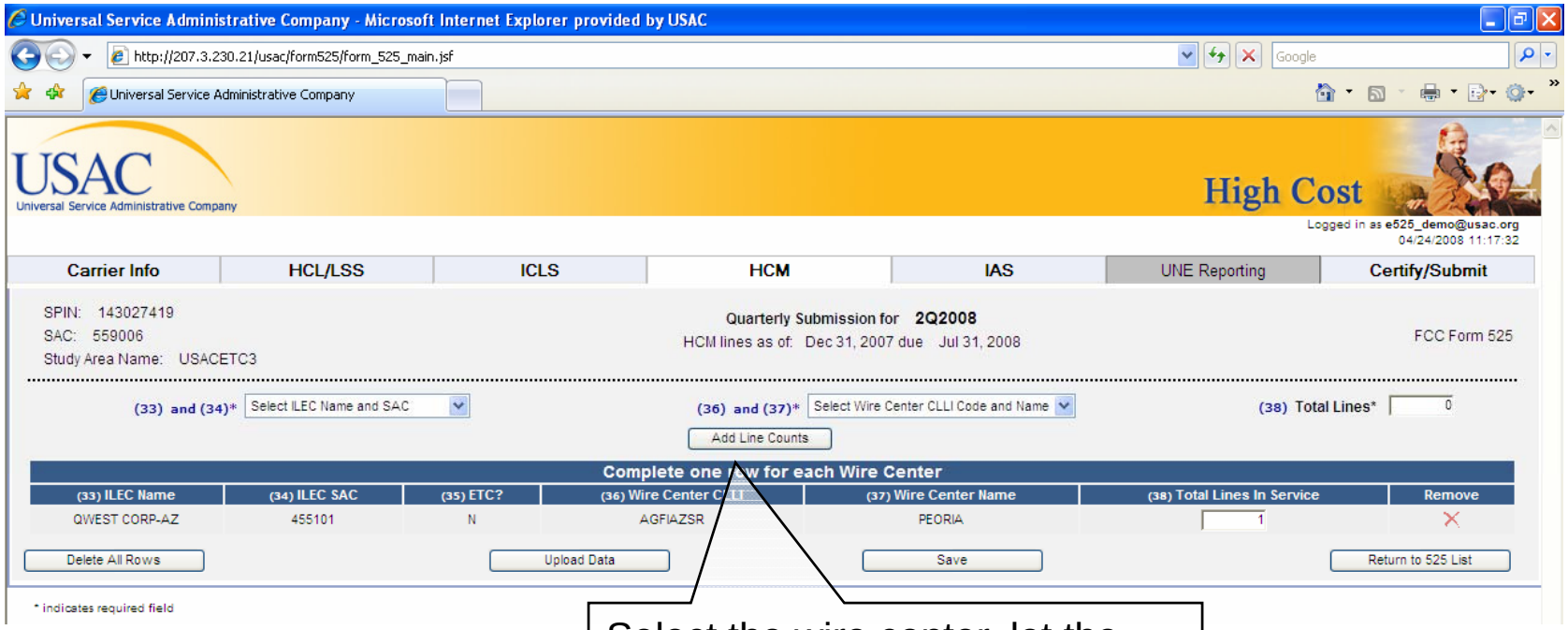


As the drop-down here shows, only non-rural carriers are displayed as line entry options.

Online Form 525
New Filing – HCM Page, Wire Center/CLLI



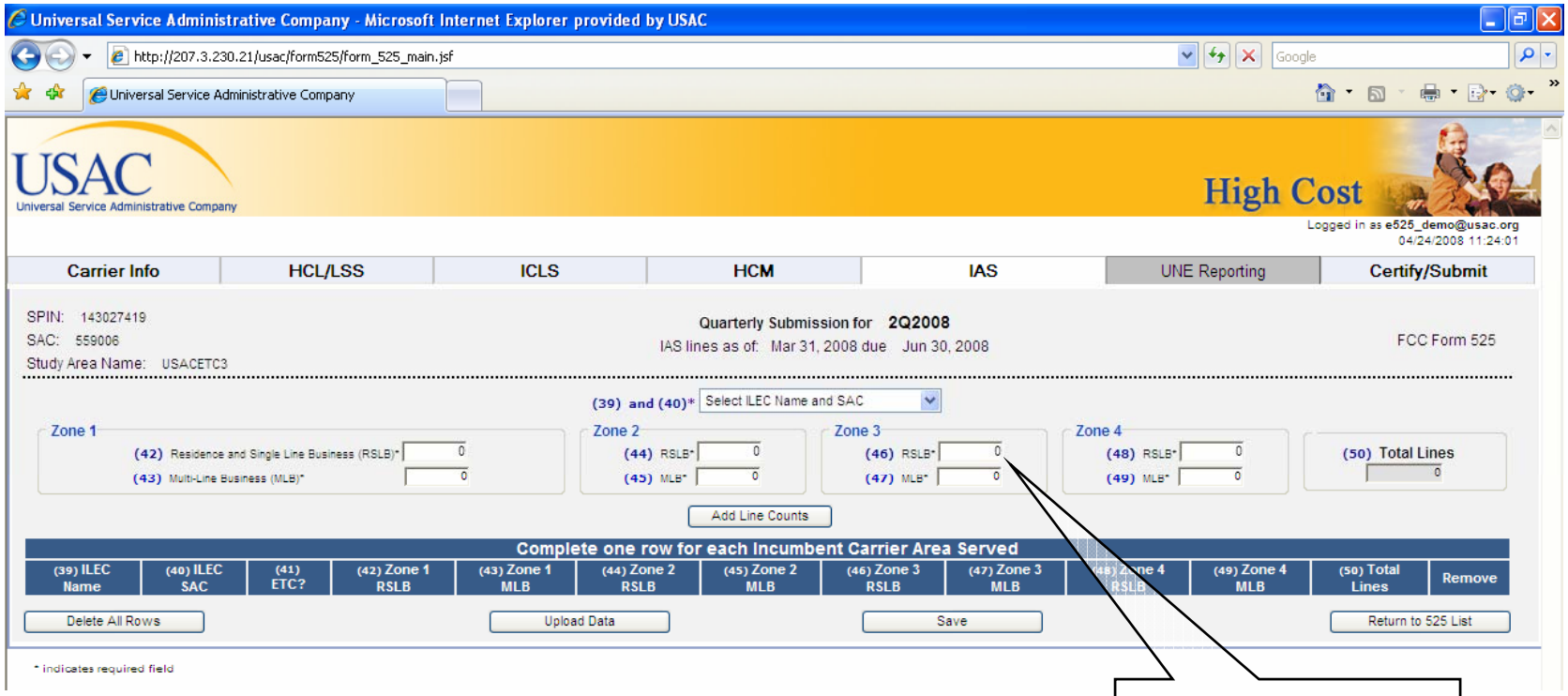
Online Form 525
New Filing – HCM Page, Line Count Added



Select the wire center, let the data load, enter the number of lines, and “Add Line Counts.”

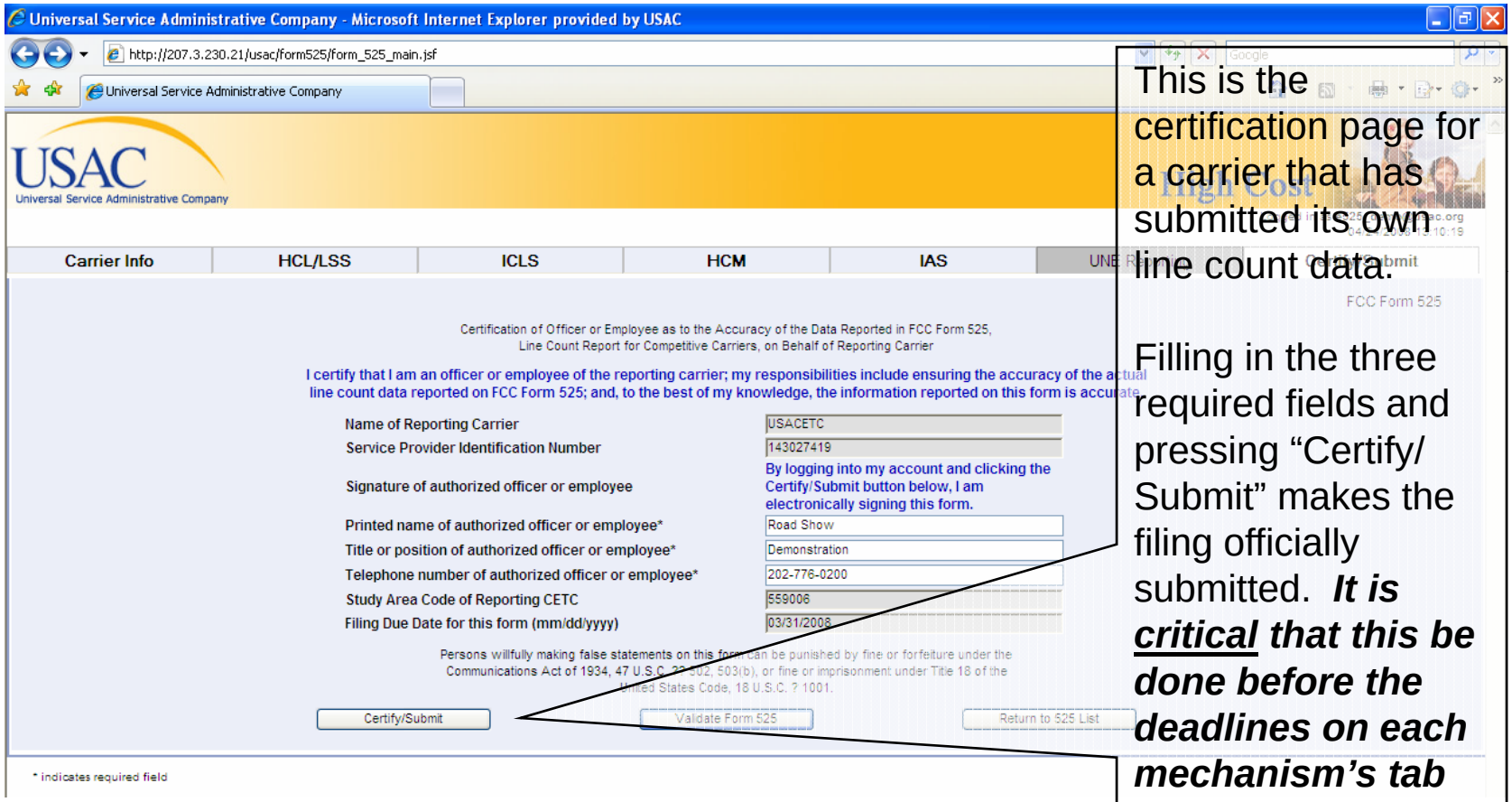
The new line count is then displayed.

Online Form 525
New Filing – IAS Page



Lines must be entered by customer class & UNE zone where applicable.

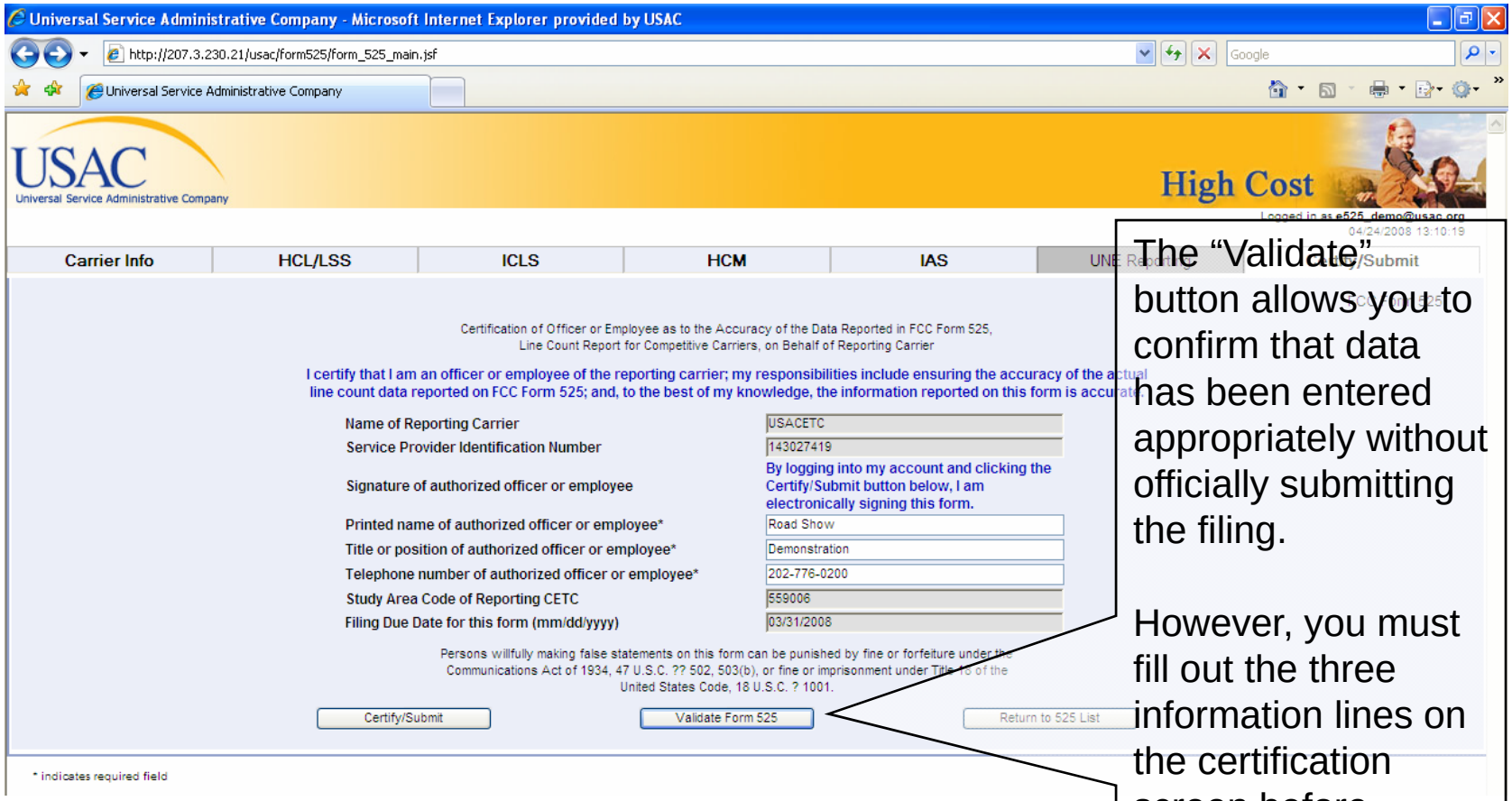
Online Form 525 Certification Page



This is the certification page for a carrier that has submitted its own line count data.

Filling in the three required fields and pressing “Certify/ Submit” makes the filing officially submitted. ***It is <u>critical</u> that this be done before the deadlines on each mechanism’s tab to be considered timely***.

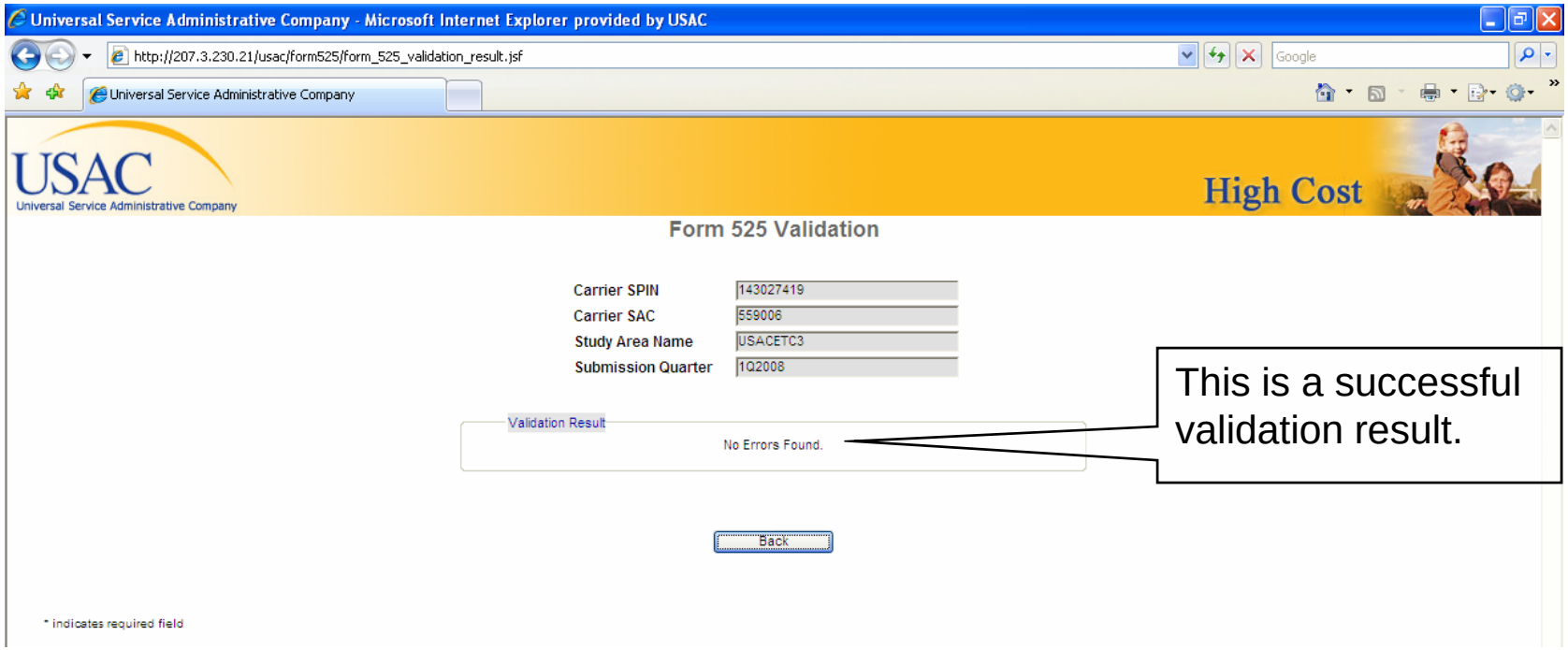
Online Form 525 Certification Page



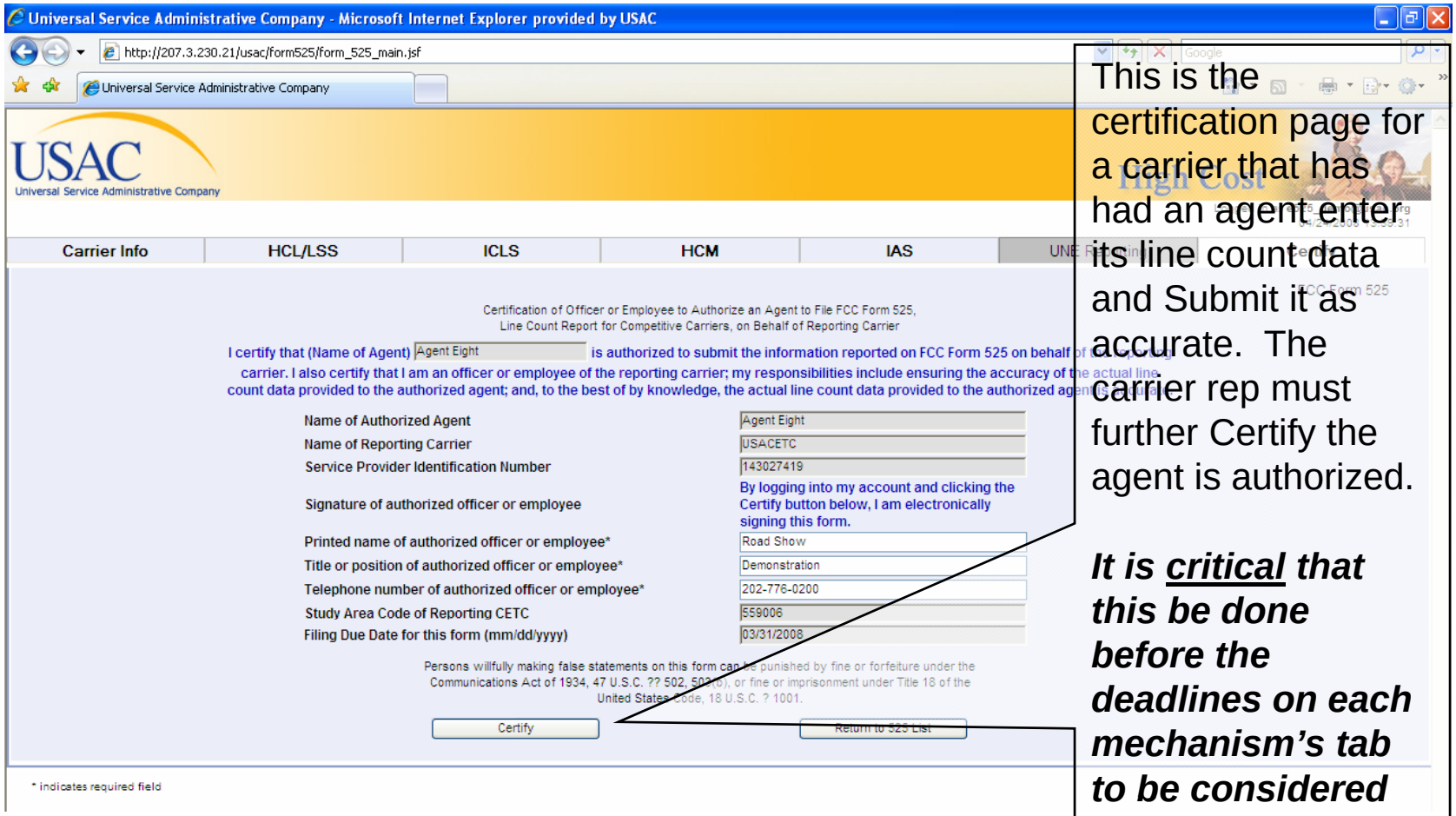
The "Validate" button allows you to confirm that data has been entered appropriately without officially submitting the filing.

However, you must fill out the three information lines on the certification screen before pressing "Validate."

Online Form 525 Certification Page



Online Form 525
Certification Page of Agent Data

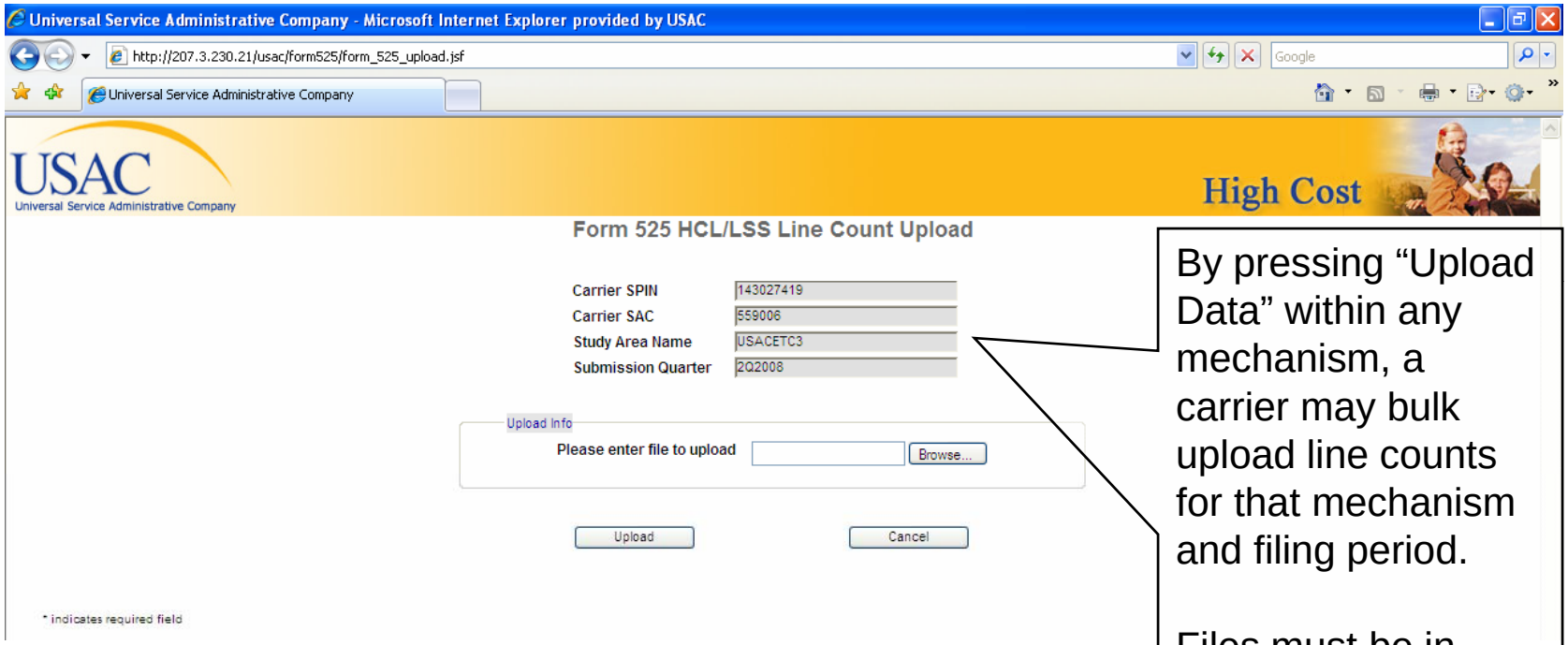


This is the certification page for a carrier that has had an agent enter its line count data and Submit it as accurate. The carrier rep must further Certify the agent is authorized.

It is <u>critical</u> that this be done before the deadlines on each mechanism's tab to be considered timely.

III. Bulk Upload Option

Bulk Upload Option

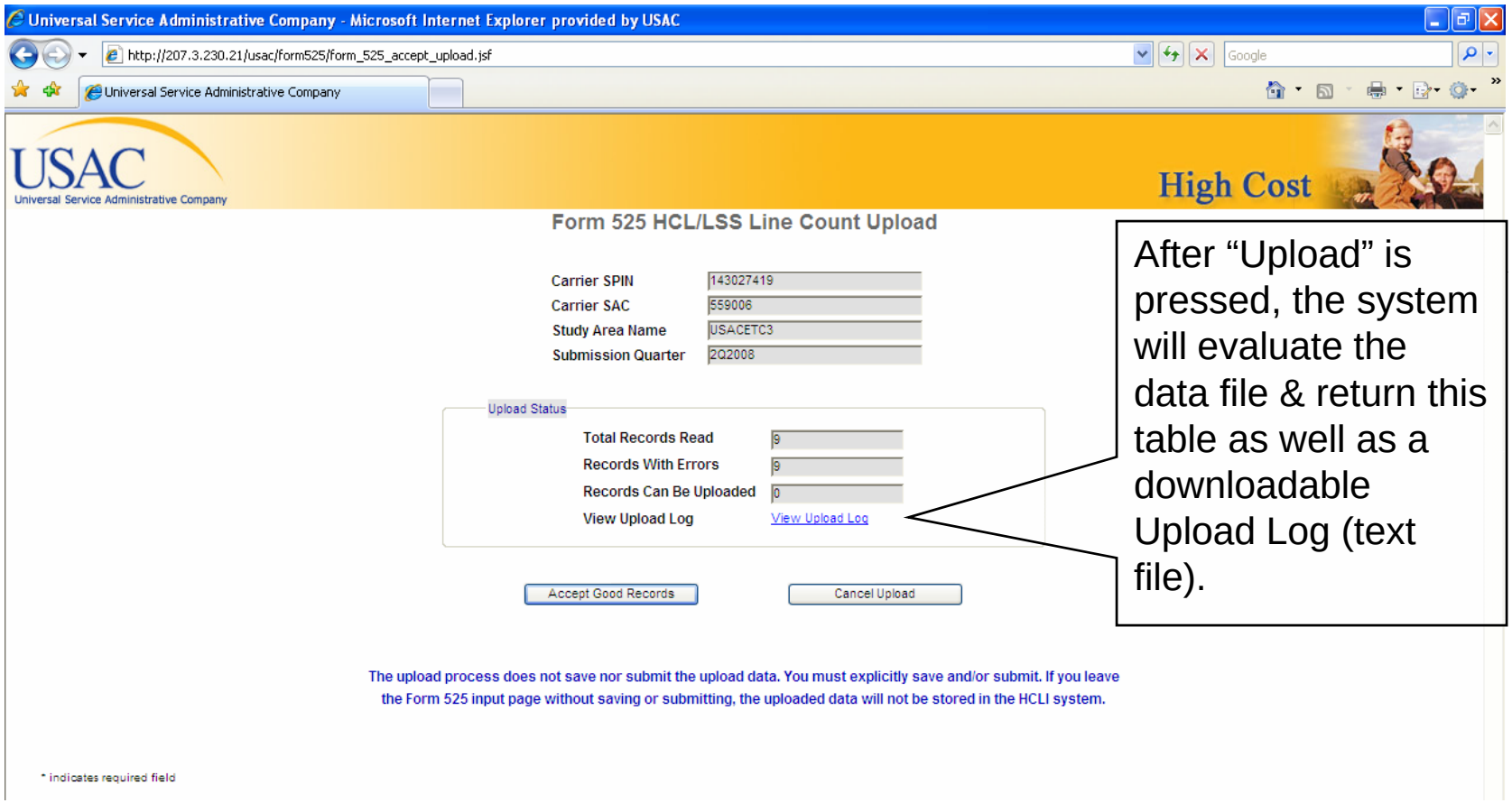


By pressing "Upload Data" within any mechanism, a carrier may bulk upload line counts for that mechanism and filing period.

Files must be in pipe-delimited value format with the proper fields.

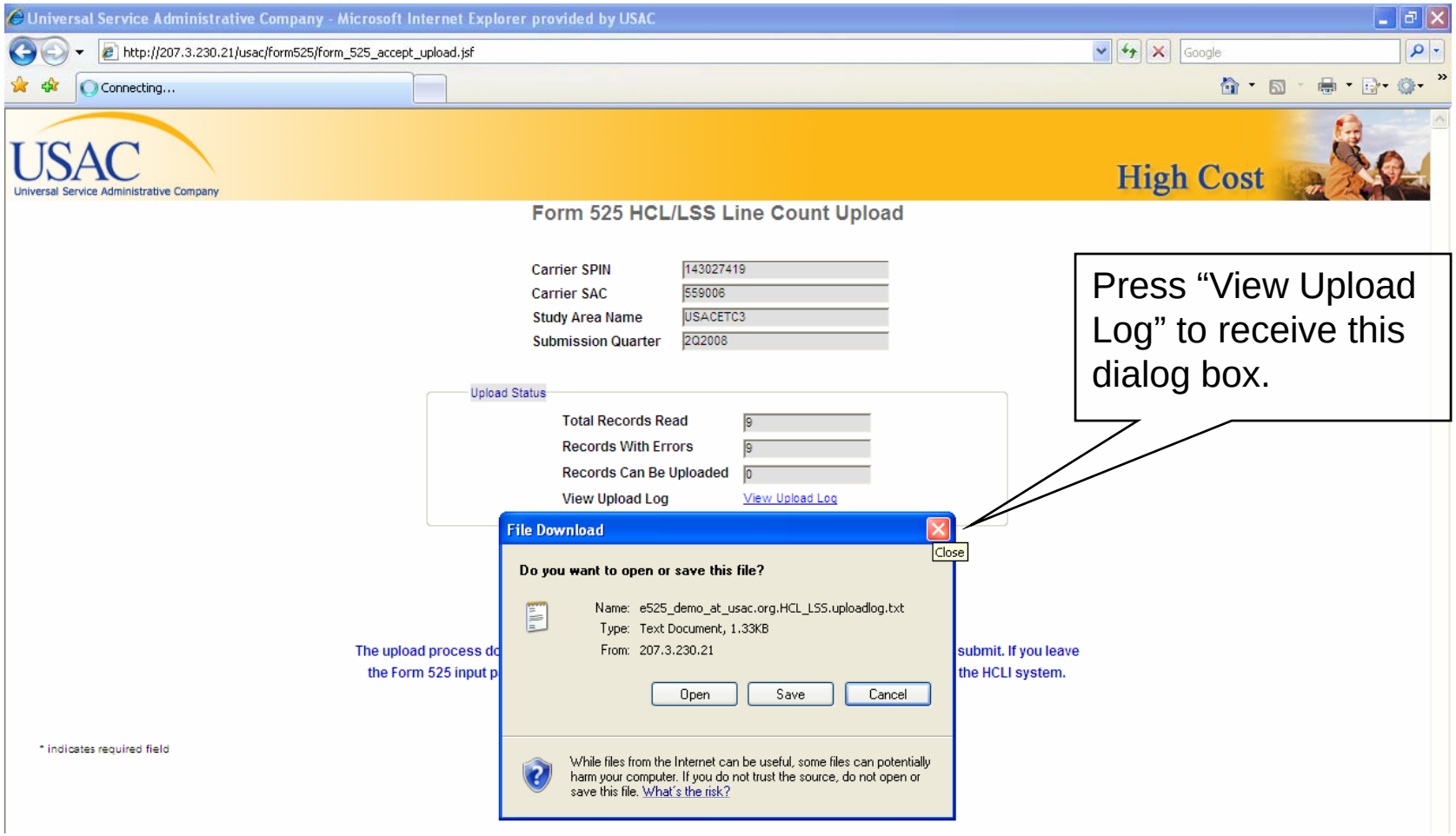
(Instructions and layout are available.)

Bulk Upload Result Screen

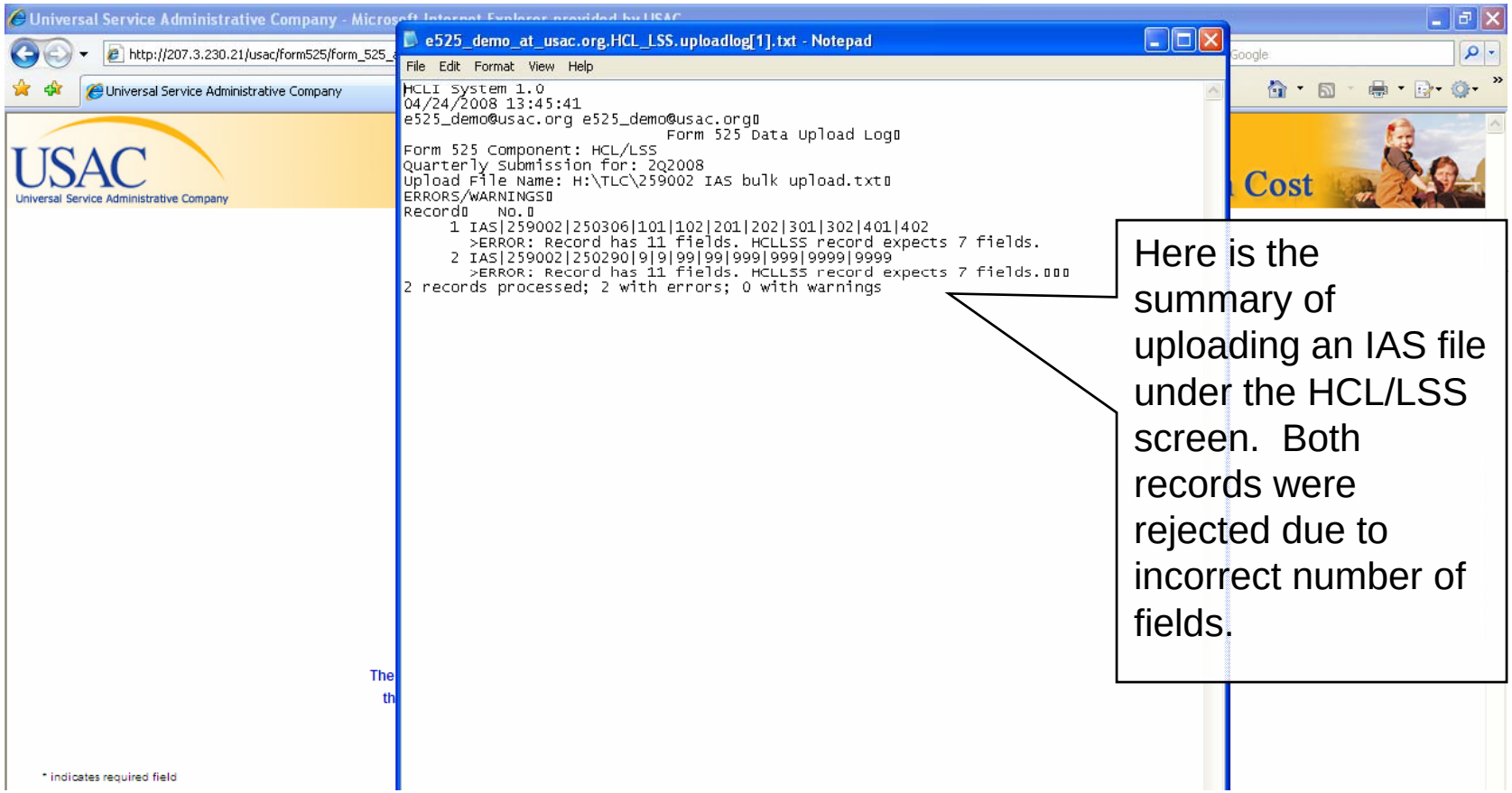


After "Upload" is pressed, the system will evaluate the data file & return this table as well as a downloadable Upload Log (text file).

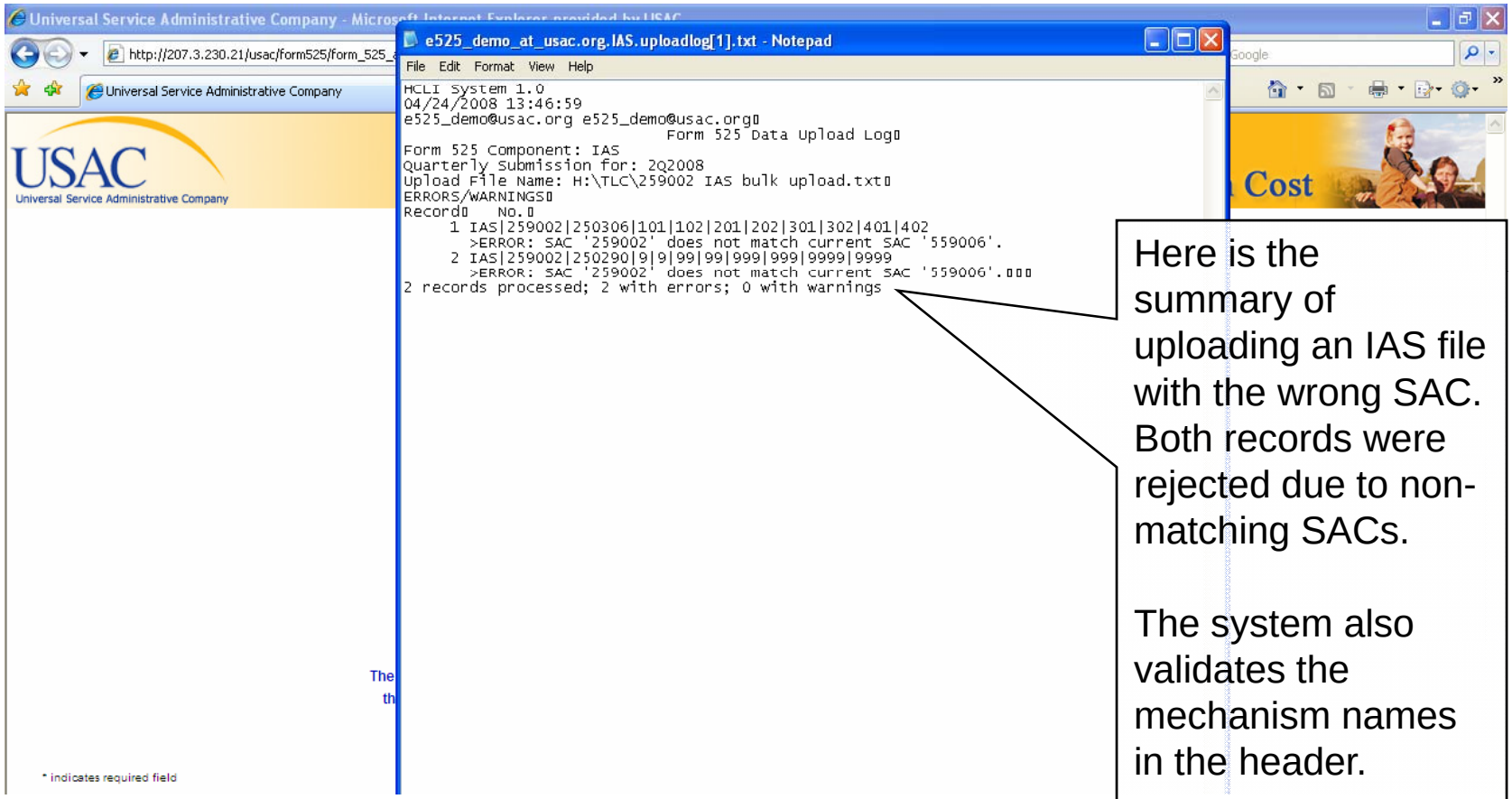
Bulk Upload Result File Download



Bulk Upload Result File – Wrong Mechanism



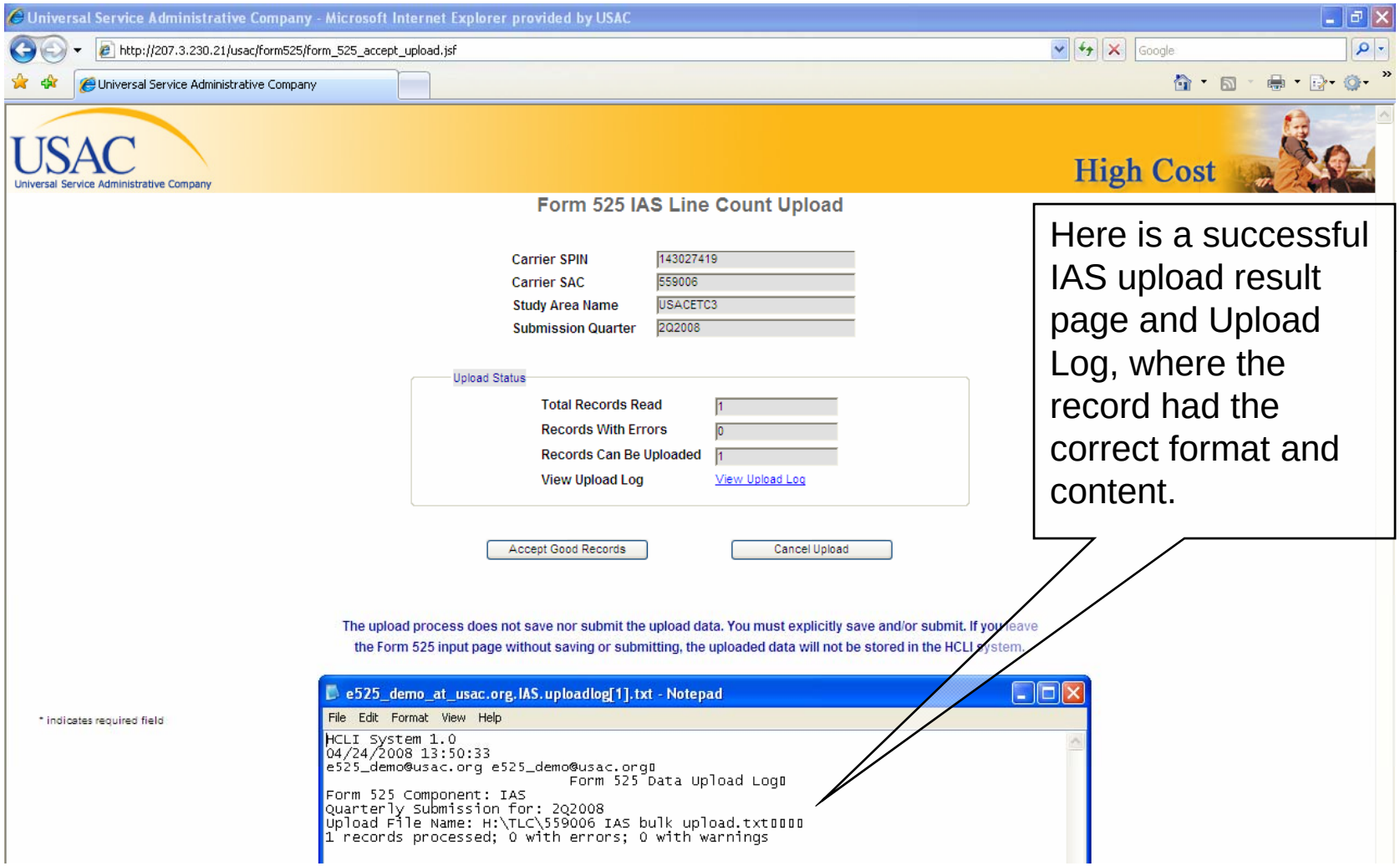
Bulk Upload Result File – Wrong SAC



Here is the summary of uploading an IAS file with the wrong SAC. Both records were rejected due to non-matching SACs.

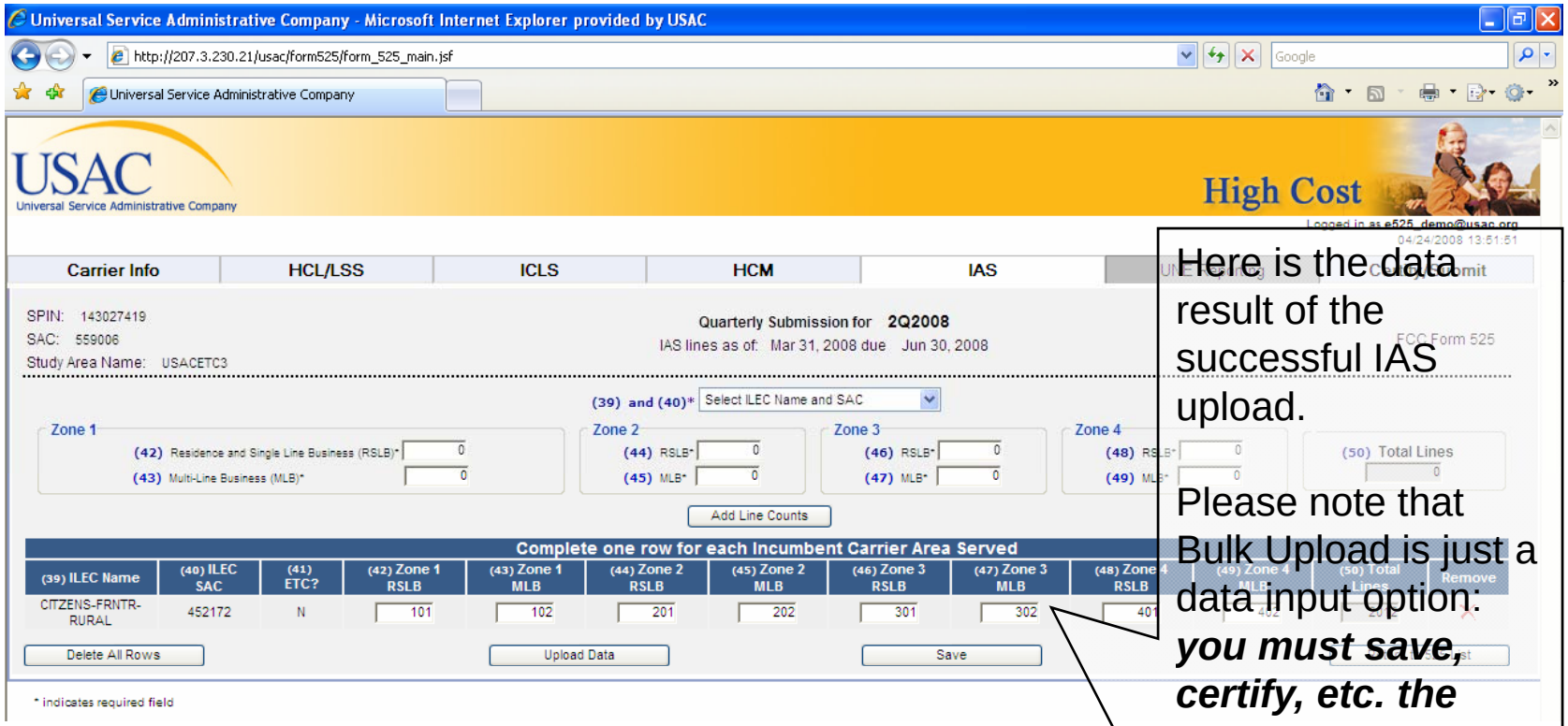
The system also validates the mechanism names in the header.

Bulk Upload Result File – Success



Here is a successful IAS upload result page and Upload Log, where the record had the correct format and content.

Bulk Upload Result – Successful Upload



Here is the data result of the successful IAS upload.

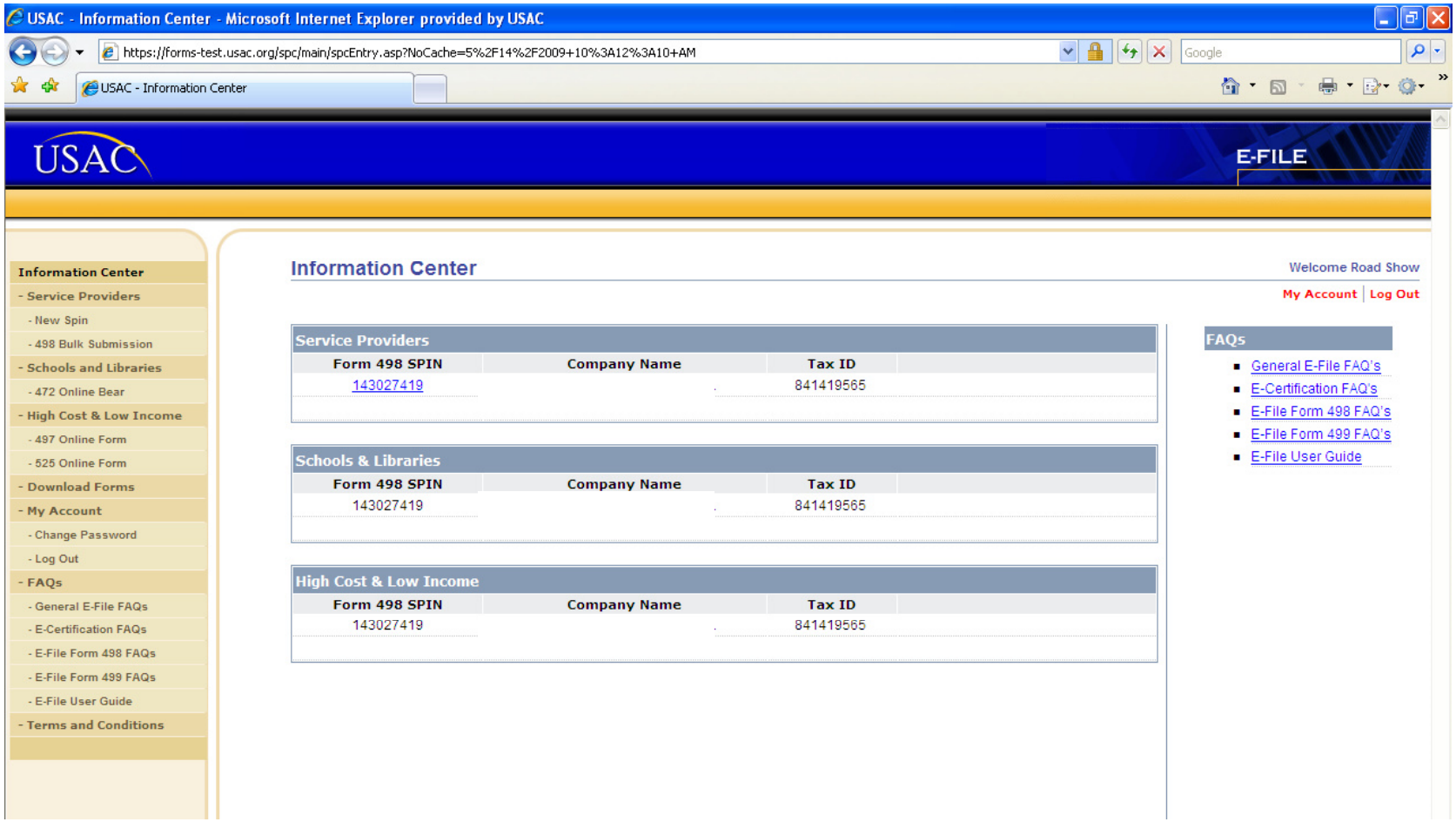
Please note that Bulk Upload is just a data input option: ***you must save, certify, etc. the data as described in Section II to officially Submit your filing***.

If you have any general High Cost questions, please contact USAC's Customer Service Center at 1-877-877-4925.

For password help (E-File), please call 1-888-641-8722. Please have your CETC SPIN ready.

For technical help with e525, please call 1-202-776-0200 or email hcinfo@usac.org.

Thank you.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https://forms-test.usac.org/spc/main/spcEntry.asp?NoCache=5%2F14%2F2009+10%3A12%3A10+AM
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USAC
E-FILE
Information Center
- Service Providers
- New Spin
- 498 Bulk Submission
- Schools and Libraries
- 472 Online Bear
- High Cost & Low Income
- 497 Online Form
- 525 Online Form
- Download Forms
- My Account
- Change Password
- Log Out
- FAQs
- General E-File FAQs
- E-Certification FAQs
- E-File Form 498 FAQs
- E-File Form 499 FAQs
- E-File User Guide
- Terms and Conditions
Information Center
Welcome Road Show
My Account | Log Out
Service Providers
Form 498 SPIN
Company Name
Tax ID
143027419
841419565
Schools & Libraries
Form 498 SPIN
Company Name
Tax ID
143027419
841419565
High Cost & Low Income
Form 498 SPIN
Company Name
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FAQs
General E-File FAQ's
E-Certification FAQ's
E-File Form 498 FAQ's
E-File Form 499 FAQ's
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