E-rate Program

Introducing EPC

October – November, 2015

Albuquerque • Minneapolis • Los Angeles • Portland

Overview

- Advantages of the portal

- How to log in

- How to create a new user

  – My Landing Page

- How to update entity information

- How to modify an account administrator

- How to add a consultant

Why Move to a Portal?

- Move to one location for all program activities.

  - Complete and certify program forms

  - Obtain the status of applications

  - Submit requests

  - Receive timely reminders and notifications

  - Respond to PIA questions

  - Ask USAC questions

- Improve the customer experience.

- Streamline the application process.

Advantages of the Portal

- All of your forms, submitted documentation, and requests will be in one location online and easily accessible.

- Users can access the portal from any device (*e.g.*, desktop computer, laptop computer, tablet, smartphone) and any browser.

Advantages of the Portal

- School districts and library systems can update and store address information and other data on their individual schools and libraries. This information can then be uploaded into online forms so that you do not have to re-enter it every year.

- Consortia and statewide applicants will have a complete list of their members, and service providers and consultants will have a complete list of their clients.

Advantages of the Portal

- Applicants will no longer need a Personal Identification Number (PIN) to certify forms.

- Account administrators can create as many account users as they wish, and decide which activities the users can perform (*i.e.,* set their permissions or user rights).

How to Log In

- USAC creates an account for the applicant organization and identifies an account administrator.

- Applicant organization types:

  – Independent school

  – Independent library

  – School district

  – Library system

  – Consortium / statewide applicant

How to Log In

- USAC sends an invitation email to the account administrator to log in to the portal.

- The account administrator goes to portal.usac.org, enters his or her email address – the "Username" – and clicks "Forgot Password." NOTE: As long as the account administrator has been set up in USAC's system, it is not necessary to locate the invitation email.

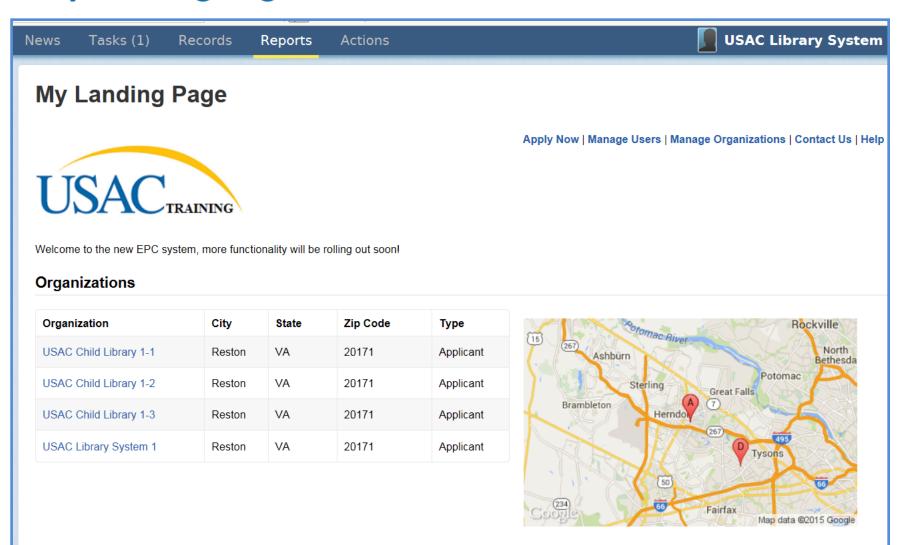- The account administrator then re-enters the email address and clicks "Request Password Reset."

How to Log In

- USAC sends a second email with a link to create a password. **This link is only valid for 15 minutes.**

- The account administrator clicks the link, enters the email address, and creates a "new" password.

- After clicking "Reset Password," the account administrator can click the link provided to log in.

- After logging in with the email address ("Username") and password, the account administrator clicks the link to accept the terms and conditions of use.

Video Demo – How to Log In

http://www.usac.org/sl/about/outreach/videos/EPC-logging-in.aspx

My Landing Page

My Landing Page

How to Create a New User

- The account administrator signs in to the portal.

- From My Landing Page, choose "Manage Users" from the upper right-hand corner.

- Check the box to the left of the organization name and click "Create a New User."

- Enter the new user's information. Each required field is marked with a red asterisk (*).

How to Create a New User

- Select the appropriate permissions that the new user should have. The choices are:

  - Full rights (create, edit, and certify forms)

  - Partial rights (create and edit forms)

  - View only rights (view forms)

- Review the information you provided. Click "Previous" to make any necessary changes.

- When you are finished, click "Submit."

How to Create a New User

- The new user will receive an invitation from USAC and must go through the same steps as the account administrator to log in for the first time (forgot/reset password, accept terms and conditions) before using the system.

Video Demo – How to Create a New User

http://www.usac.org/sl/about/outreach/videos/EPC-Creating-a-New-User.aspx

How to Add a Consultant

- The account administrator signs in to the portal.

- From My Landing Page, choose your organization.

- In the top right-hand corner of the organization dashboard page is a button with an ellipsis and an arrow ("… ↓"). Click this button and choose "Manage Organization Relationships."

- Click "Add a Consulting Firm" from the next screen.

How to Add a Consultant

- On the next screen, enter as much information about the consulting organization as you know to see if the system finds a match.

- You can also go to the Records tab and search for the consulting organization.

NOTE: To complete this process, the consulting organization must have an account in the portal and the consultant employee must have been created as a user on the consulting organization account and accepted the terms and conditions.

How to Add a Consultant

- Under the "Add Relationship(s)" heading on the search results, check the box next to the consulting organization's name and then click "Submit."

- After you have established a link to the consulting firm, click the "Add or Remove Existing Users" button at the top of the screen.

- Below the heading "Search For Users to Add," type the first name, email, and/or last name of the consulting organization's employee and click "Search."

How to Add a Consultant

- On the search results, check the box to the left of the consultant employee and click "Submit" to link the employee to your organization.

- To set the rights for the consultant employee, click the "Manage User Permissions" button at the top of the screen.

- Scroll down to the consultant employee and set permissions as you did when you added a new user.

Video Demo – How to Add a Consultant

http://www.usac.org/sl/about/outreach/videos/EPC-Adding-a-Consultant.aspx

How to Modify an Account Administrator

- Account administrators can create new users, update profile information, link the organization to consultants and consortia, and modify the rights of existing users.

- In general, USAC created accounts for billed entities that filed FCC Forms 471 for FY2015 and set up the authorized persons on those forms as account administrators.

- After an account administrator has logged into the portal and accepted the terms and conditions, he or she can designate another person at the organization to be the account administrator.

How to Modify an Account Administrator

- First, the current account administrator must add the prospective account administrator to the organization as a new user if he or she is not already in the organization.

- On My Landing Page, click the link to the organization.

- From the organization dashboard page, click the button with the ellipsis and arrow ("... ↓") and choose "Modify Account Administrator."

- From the list below "Modify Account Administrator," check the box to the left of the appropriate name.

How to Modify an Account Administrator

- Uncheck the box to the left of the current account administrator, then check the box to the left of the new account administrator and click "Continue."

- Verify that the current and new account administrator information is correct and click "Submit."

- The new account administrator will now have the account administrator rights.

  - Remember that there can only be one account administrator.

Video Demo – How to Modify an Account Administrator

http://www.usac.org/sl/about/outreach/videos/EPC-Modifying-Your-Account-Administrator.aspx

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

Where to go for help

- Visit the USAC website for the following:

  – Glossary of terms

  – Frequently asked questions

  – Applicant user guides

  – Video tutorials

  – Copy of the portal terms and conditions

EPC page on the USAC website

Additional Resources

To learn how to use EPC to successfully maintain your account with USAC, watch our video tutorials and read our online user guides.

- EPC Glossary of Terms 📄   **Glossary**

- EPC Frequently Asked Questions (FAQs)   **FAQs**

Applicant User Guides

- Getting Started 📄
- Navigating EPC 📄
- Managing Users 📄
- Managing Your Organization 📄
- Customer Service 📄
- Searching FCC Forms 470 📄
- Filing FCC Form 470 📄

Service Provider User Guides

- Getting Started 📄
- Navigating EPC 📄
- Managing Users 📄
- Managing Your Organization 📄
- Customer Service 📄
- Searching FCC Forms 470 📄

User Guides

EPC Video Tutorials

- Logging in to EPC
- How to Create a New User
- How to Modify an Account Admin
- How to Add a Consultant
- Manage User Permissions
- How to File FCC Form 470

Video Tutorials

Terms & Conditions

- EPC Access Agreement (Commercial End User Agreement) 📄   **Terms & Conditions**

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Thank you!