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Top Five Questions for the Client Service Bureau

Below is a list of the five most common questions that came in to our Client Service Bureau (CSB) in December. We are providing guidance for each of these questions so that applicants can either perform these actions themselves or be prepared with the information CSB will need in order to assist them.

If you need assistance from CSB, we suggest that you call them directly at (888) 203-8100 rather than using the Submit a Question feature on our website.

How do I create an organization in EPC?

CSB must create an organization in EPC. Organizations can be parent organizations or child organizations.

- Parent organizations, such as school districts, library systems, and consortia, make decisions and file forms on behalf of their child organizations. They have their own accounts in EPC. This also includes independent schools and independent libraries.
- Child organizations, such as individual schools within a school district and individual libraries in a library system, are featured on the accounts of their parent organizations. They do not have their own accounts in EPC.

Before you call CSB, locate the entity number(s) of the organization(s) you want to create. It is possible that the organization has already been created, but CSB may need to set up an account administrator and/or associate the organization with a parent organization.

If your organization is new and does not yet have an entity number, CSB can create the organization for you and assign it an entity number. Be sure to have the contact information for the organization (address, city, state, zip code, telephone number, email address) ready before you call. Also, if the organization is a parent organization, CSB will need to set up an account administrator (see below).

How do I set up account administrator access in EPC?

Before you can be an account administrator, your organization must have an account in EPC.

Organization accounts can be set up for the following types of applicants:

- Independent schools
- Independent libraries
- School districts
- Library systems
- Consortia

Individual schools that are part of a school district and individual libraries that are part of a library system do not have their own accounts and therefore do not have account administrators.

USAC started setting up organization accounts back in July 2015 based on the information from FY2015 FCC Forms 471. If an organization had a single authorized person for all of its FCC Forms 471, USAC set up that authorized person as the account administrator for that organization and sent an email invitation to that individual with instructions on how to set up a password and log in to EPC.

If you believe you were set up as an account administrator for one of the above types of entities but you cannot locate USAC's earlier email, you can do the following:

- Open a browser, go to the [EPC login page](#) and click the "I Agree" button.
- On the next screen, click "Reset Your Password."
- On the next screen, enter your email address in the Username field and click "Request Password Reset." If you were set up as an account administrator, you will then receive the email from USAC with instructions on how to proceed.

If you do not receive an email – or you do not believe you were set up as an account administrator – call CSB for assistance. Be ready to provide your organization's billed entity number and contact information. You also may be asked for proof that you are an employee of your organization – a letter on your organization's letterhead or your email address from the organization's domain name are generally sufficient.

Your current account administrator can also transfer account administrator rights to you. Your account administrator must first set you up as a user on the organization's account. Remember that you will not appear on the organization account until you have logged in to EPC and accepted the terms and conditions of use. (CSB can also help you transfer account administrator rights if your current account administrator is not available.)

- Read the [Managing Users](#) user guide or watch the [How to Create a New User](#) video for guidance on creating new users.
- Watch the video [Modifying an Account Administrator](#) for guidance on transferring account administrator responsibilities.

How do I get a user account in EPC?

Your organization's account administrator can set you up as a user in EPC. If your account administrator is not sure how to do this, he or she can read the [Managing Users](#) user guide or watch the [How to Create a New User](#) video for guidance.

In general, your user account will be set up with one of these three levels of rights (permissions):

- Full rights – You can modify information on your organization and complete and certify program forms.
- Partial rights – You can modify information on your organization and complete but not certify program forms.
- View-only rights – You can view but not modify information on your organization and view but not complete or certify program forms.

A new user will not appear on an organization account until he or she has logged in to EPC and accepted the terms and conditions of use. To do this, after logging in, the new user clicks the Tasks tab at the top

of any page and then clicks on the link in the only task on that page. For a demonstration of the full login process, watch the [Logging in to EPC](#) video.

NOTE: If you are using a consultant, do not set the consultant up directly as a user on your organization account. The consulting firm must first set up its own organization account and create your consultant as a user on that account. Your account administrator can then associate the consulting firm with your organization and give your consultant appropriate rights.

- Read the user guide [Managing Organizations](#) or watch the video [Adding a Consultant](#) for guidance on associating a consulting firm with your organization, adding a consultant, and assigning rights.

How do I navigate through the FCC Form 470 in EPC?

You have three options for learning how to navigate in the FCC Form 470:

1. Watch the [series of videos on filing an FCC Form 470](#).
2. Read through the [FCC Form 470 User Guide](#). You can also review the following SL News Briefs for information on completing each section of the form: [July 31, 2015](#) (Basic Information), [August 7](#) (Category One Requests), [August 14](#) (Category Two Requests), [August 21](#) (Technical Contact and Procurement), and [September 4](#) (Review and Certify).
3. Log in to your organization's account in EPC and start an FCC Form 470. As long as you do not certify the form, you can practice navigating through an FCC Form 470 and then click the "Discard" button at the bottom of any page in the form to permanently remove the form from USAC's records.

How do I get the status of a form or request I have submitted?

For some forms and requests, you can locate the status yourself; for others, you must call CSB.

- **FY2016 FCC Forms 470** are all in EPC. Generally the status of these forms is either incomplete or certified. In EPC, you can review the status of forms in the list at the bottom of your landing page. If you click the FCC Form 470 hyperlink in that table, you will be taken to the form's record. From there, you can select "Generated Documents" on the left-hand side to view a PDF version of the form. The day after a form is certified, you can also verify its status by using the [View an FCC Form 470 \(FY2016\)](#) on the Search Tools page of the USAC website.
- The status of **FY2015 FCC Forms 471** is featured on the [View 471 Status](#) tool on the Search Tools page of the USAC website.
- For the status of data entry of a paper form – **FCC Forms 472, 473, 474, 486, and 500** can be (or must be) submitted on paper – call CSB. In fact, CSB may be waiting for your call because they have encountered a data entry issue and are trying to contact you.
- To find out if an **FCC Form 486** (paper or electronic) has been successfully processed, go to the [Data Retrieval Tool](#) on the USAC website. Enter your billed entity number in the "BEN" field, then click the "Create Standard Report" button at the bottom of the page. In your search results, any Funding Request Number (FRN) with an entry in the FCC Form 486 Service Start Date field ("486 SSD") indicates a successfully processed FCC Form 486.
- To find out if an **invoice deadline extension request** has been processed, go to the [FRN Extension Table](#) on the USAC website and search for your FRN. However, if the table has not been updated to include the status of your FRN, you can call CSB to get its status.
- For the status of all other requests – **service delivery extensions, service substitutions, SPIN changes, and appeals** – call CSB.

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