Universal Service Administrative Co.

E-Rate

- SPECIAL EDITION -

December 19, 2022

E-Rate Systems Consolidation

USAC is consolidating its E-Rate Legacy applications and forms into the E-Rate Productivity Center (EPC). E-Rate invoicing related forms (the FCC Form 472, FCC Form 473, and the FCC Form 474) will be moved into EPC as part of this consolidation. **While the interface will look different, the information and documentation to be submitted for these E-Rate transactions will not change**.

Implementation **will occur after January 29, 2023**, which is the FY2021 E-Rate non-recurring services invoice filing deadline. USAC will make a public announcement through a News Brief and on the E-Rate website once the exact date is determined. Before the launch, USAC will also provide training materials and training sessions to assist users through this change.

In the November 21, 2022 Special Edition News Brief, we recommended updating the Account Administrator information for your entities or establishing an Account Administrator for your EPC account if you are new to the E-Rate program. **USAC also migrated all applicants' and service providers' existing invoicing permissions in early December**. In this issue, we provide information on reviewing your user permissions and updating those, if needed.

Review Your Invoicing Permissions

Once E-Rate invoicing functionality is moved to EPC, invoicing access for applicants will be based on user access rights in EPC instead of the current BEAR Access Request process. Access to submit the FCC Form 472 (BEAR) will be determined based on the permissions established in the **Applicant Manage User Permissions** page using a new "BEAR/472 Permissions" column once invoicing functionality is moved into EPC. Access to submit the FCC Form 474 (SPI) will be determined based on the permissions established in the **Service Provider Manage User Permissions** page.

To help with this transition, USAC migrated all applicants' and service providers' existing invoicing permissions in early December. USAC "grand-fathered" all applicant and service provider invoicing access permissions into EPC based on your existing invoicing access as follows:

- **Applicant BEAR/FCC Form 472 Access**: Any **email address** with access to invoice for a specific Billed Entity (BEN) in the Legacy invoicing system **who also has access to that BEN in EPC** and active status was given "Full Rights" invoicing access in EPC. The email addresses between these two systems must have been an exact match for this access to be established.

- **Service Provider SPI/FCC Form 474 Access**: Any **email address** with access to invoice for a specific Service Provider Identification Number (SPIN) in the Legacy invoicing system **who also has access to that SPIN in EPC** and active status was given "Full Rights" invoicing access in EPC. The email addresses between these two systems must have been an exact match for this access to be established.

There are three levels of permissions in EPC.

- **View Only Rights** – Allows the user to view certain information about invoices or post-commitment transactions.
- **Partial Rights** – Allows the user to view and prepare invoices and post-commitment requests, but any transactions requiring a certification must be sent to a Full Rights user. In addition, a Partial Rights user cannot reply to USAC outreach inquiries.
- **Full Rights** – Allows the user to view, prepare, submit, and certify the forms and any post-commitment requests. A Full Rights user can provide responses to outreach from USAC reviewers.

We encourage Applicants to **review and update your organization's users and current permission levels** for invoicing and other post-commitment requests so that you are ready when the system goes live after January 29, 2023. Service providers should also **review and update their users and current permission levels** for invoicing and other post-commitment changes in EPC.

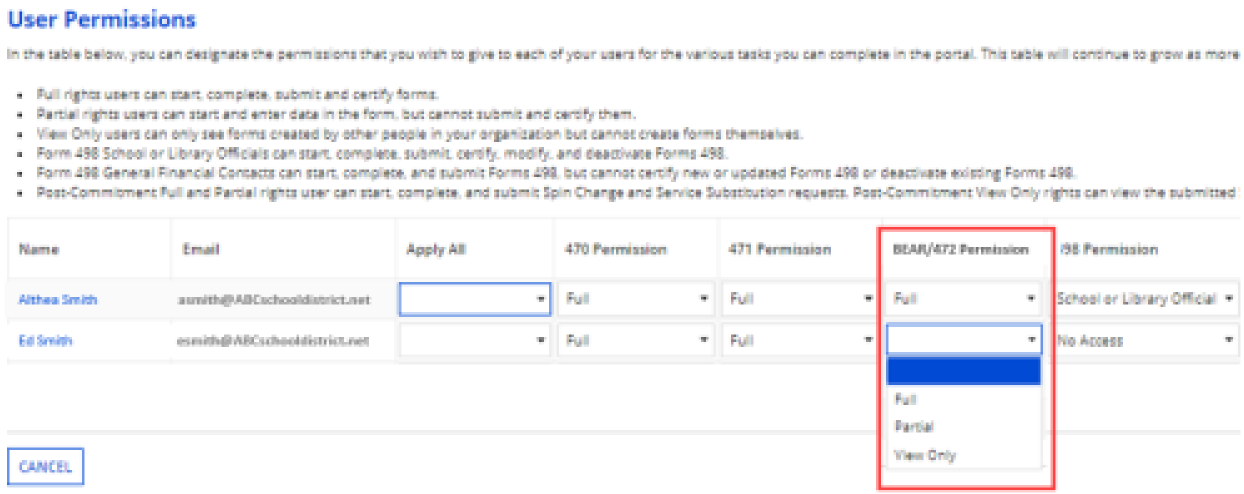
Applicant Invoice/BEAR Form Permissions

Applicants that will invoice E-Rate via the BEAR form (FCC Form 472) will need to ensure that their users have the appropriate permissions to view, prepare, submit, and certify the forms once invoicing functionality is moved into EPC as part of the system consolidation. This will be a new feature available for applicants in EPC.

Manage User Permissions
The Account Administrator can manage the organization's users and any consultant users from the **Manage User Permissions** screen. To begin:

1. Log into EPC.
2. On **My Applicant Landing Page**, click **Manage Users**.
3. Select the organization by clicking the checkbox and then click **Manage User Permissions**.

You will arrive at the **Manage User Permissions** page where you can see all the permissions that are available. To grant a user BEAR form permissions, the Account Administrator can assign **View Only, Partial, or Full** rights under the **BEAR/472 Permissions** column in the grid. When the permission level is selected, click **Submit**.



Creating a New User
Your organization's Account Administrator can set up new users in EPC.

1. From **My Applicant Landing Page**, click **Manage Users.**
2. Select the organization by clicking the checkbox and then click **Create a New User** to get started.
3. Enter the details for the new user and scroll down to the user permissions section of the page.
4. Assign permissions as above under the **472/BEAR Permission** column in the grid.
5. When done, click **Continue.**
6. Confirm the user details and the permission level and if it is correct, click **Submit.**

The new user will receive an invitation email to sign in to EPC, create a password, and accept the terms and conditions. The user must accept the terms and conditions before the Account Administrator can modify his or her role. Once the new user accepts the terms and conditions, he or she will have access to the functionality that the role permits.

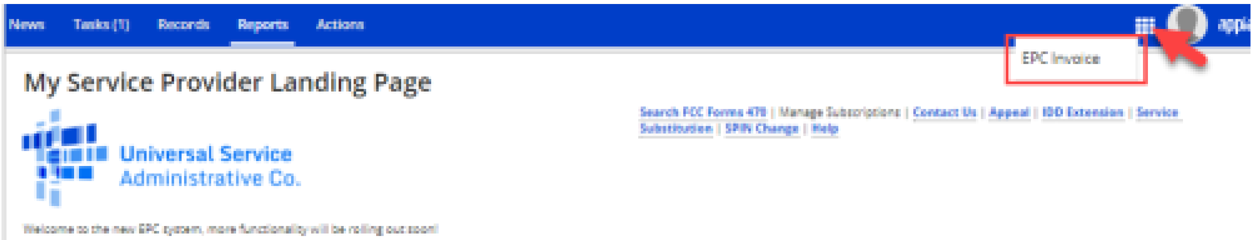
Additional Resources

- View the BEAR Create a New User video
- View the BEAR Manage User Permissions video
- View the BEAR Manage Consultants video
- View the BEAR Remove Existing Users video
- View the FCC Form 472 (BEAR) Demo

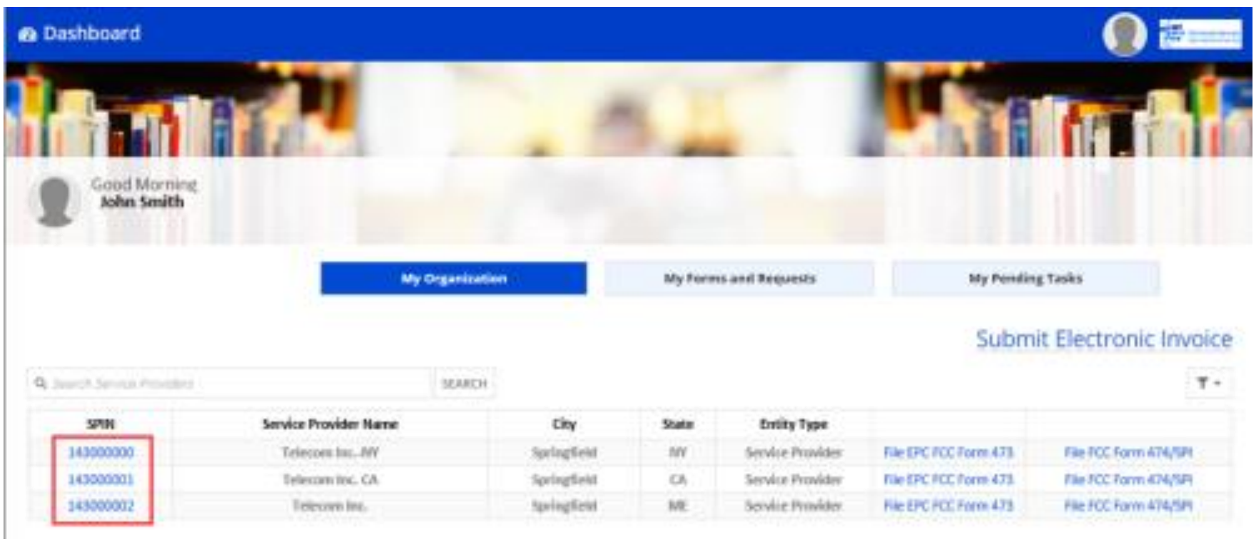
Service Provider Invoice Permissions

Periodically, service provider Account Administrators in EPC should review their users and their access level permissions to ensure information is up to date. Previously, service providers added users through updates on the FCC Form 498. Now, service providers can update their EPC users in the Invoicing Portal, which was part of Phase 1 of the E-Rate System Consolidation.

After you log into EPC, you will arrive at **My Service Provider Landing Page**. To get to the Invoicing Portal, go to the grid of squares on the upper right side next to your profile picture, and select **EPC Invoice**.



Now you are in the EPC Invoicing Portal and you will see the SPIN or SPINs for your organization. Select the SPIN for which you want to update users and permissions.



Modify Account Administrator

After you click the SPIN link, go to **Related Actions** and then select **Modify Account Administrator**. In the Modify Account Administrator section of the page, you will see the current Account Administrator and a list of other existing users. The current Account Administrator is checked by default. You can uncheck that person and check the box next to the person you want to designate as the Account Administrator and click **Continue**. On the next screen, review the change from the current Account Administrator to the designated Account Administrator and if correct, click **Submit**. The Account Administrator will be changed

Additional Resources

- View the Service Provider User Permissions video, which provides information on managing user permissions, creating new users, and adding/removing users.
- View the FCC Form 474 (SPI) Demo