



E-Rate Fall Training: EPC Administrative Window

2024 Program Participant Webinar

October 24, 2024

Housekeeping: General

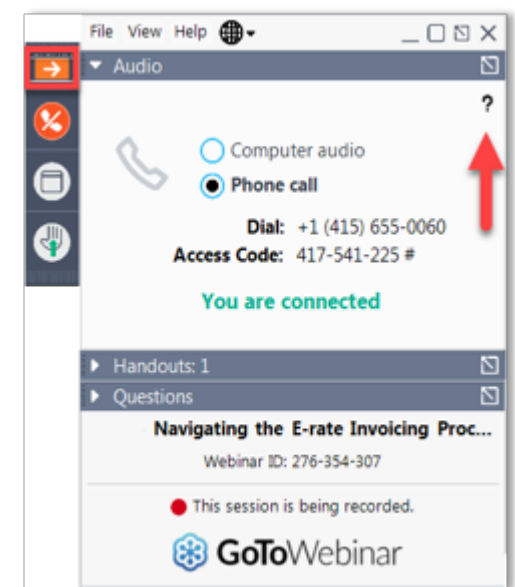
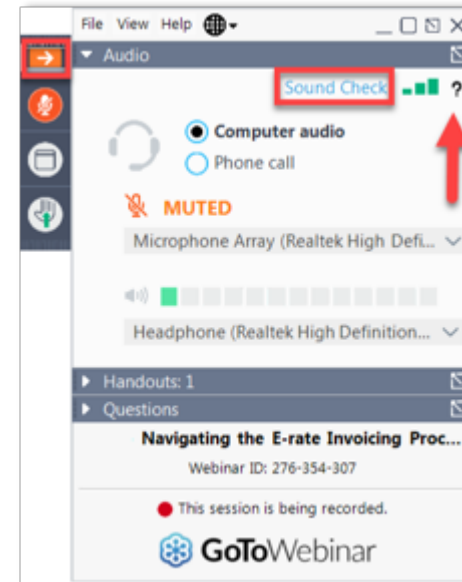
- To accommodate all attendees, real-time closed captions will be present during this presentation. We apologize in advance for any transcription errors or distractions.
- Audio is available through your computer's speakers.
- The audience will remain on mute.
- Use the **Questions** box to ask questions at any time.
- You can download the slide deck from the **Handouts** section of the webinar panel.
- This webinar will be recorded.



The screenshot displays a webinar control interface. At the top, there is a menu with 'File', 'View', and 'Help'. Below this is an 'Audio' section with a 'Sound Check' indicator and a 'MUTED' status. The audio output is set to 'Speakers (High Definition Aud...)' and the input is 'Microphone (HD Webcam C510)'. A volume slider is visible. Below the audio section is a 'Handouts: 2' section containing two items: '2017-05-05_11-59-21.png' and 'GTM iOS.jpeg'. At the bottom, there is a 'Questions' section with a text input field containing '[Enter a question for staff]' and a 'Send' button. A red text overlay reads 'Download PDF of Slides here!' pointing to the handouts. At the very bottom, there is a 'GoToWebinar' logo and the text 'Multi sessions different registrants Webinar ID: 960-960-603'.

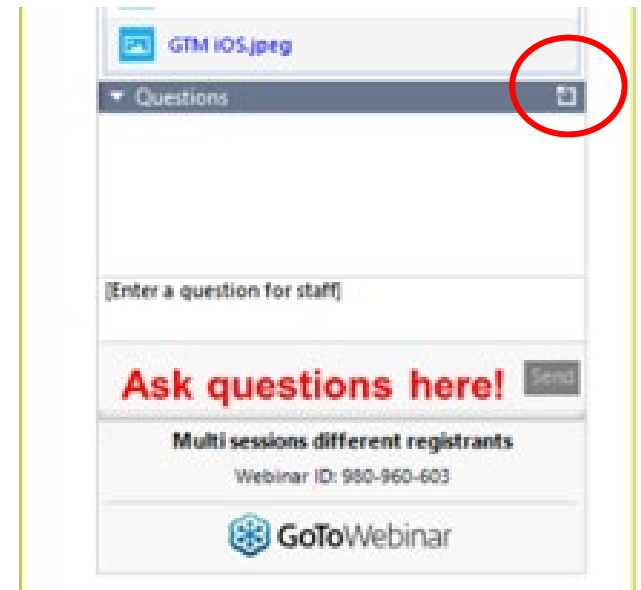
Housekeeping: Troubleshooting

- Use the **Sound Check** link and click the question mark icon for audio help.
- Exit the webinar and click the Check System Requirements link in the event confirmation email to determine whether your computer meets GoToWebinar's requirements.
- If issues persist, call (833) 851-8340 to troubleshoot with GoToWebinar.



Housekeeping: Q&A

- There will be a live Q&A session focused on today's topics.
- Tips for submitting questions:
 - Use the **Questions** box in your webinar control panel anytime during the presentation.
 - Write in full sentences.
 - Ask one question at a time.
 - Ask questions related to today's webinar content.



E-Rate Customer Service Center (CSC)



Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET



Create a customer service case in the
[E-Rate Productivity Center \(EPC\)](#):

1. Log in to EPC.
2. Select the **Contact Us** link from the upper right menu on the landing page.

E-Rate Fall Training Series 2024

- ✓ **E-Rate Program Overview: September 5, 2024**
- ✓ **Pre-Commitment: September 19, 2024**
- ✓ **Eligible Services: September 24, 2024**
- ✓ **Wi-Fi Hotspots: October 15, 2024**
- ✓ **Category Two Budgets: October 17, 2024**
- ✓ **EPC Admin Window: October 24, 2024**
- ☐ Post-Commitment: October 31, 2024
- ☐ Invoicing: November 7, 2024

- These webinars are suitable for all E-Rate experience levels; however, we recommend that those new to the program view these webinars in the order they are presented for the best learning experience.
- These webinars are recommended for both applicants and service providers, especially those new to E-Rate. A webinar tailored towards Service Providers was held in August 2024. Handouts and a recording of this webinar is available on the E-Rate [Webinars](#) page.
- Please visit the E-Rate [Webinars](#) page for additional information including course descriptions, registration links for future webinars, and access to recordings and handouts from previous webinars.

Learn

- E-Learning Modules ▾
- Videos
- Webinars**
- Regional Trainings
- Tribal Training ▾
- EPC/BEAR Training Sites ▾
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Webinars

Join USAC for our live training webinars provided throughout the year for Schools and Libraries (E-rate) Program participants. We will share program updates and essential guidance to help participants learn about and successfully navigate the program.

During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-rate Program team when we will answer questions on the webinar topic.

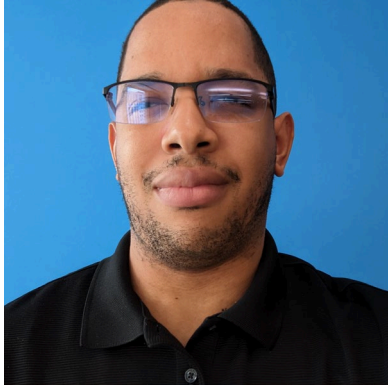
Equipment and Set-Up

To participate, you'll need:

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- A computer or mobile device with an internet connection.
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Select a webinar below to register. After registering, you will receive a confirmation email with information about the event. You can add a calendar reminder from the registration confirmation page or event confirmation email by clicking "Add to Calendar."

Meet the Team



Derrick Harrison

Program Analyst | E-Rate



Tyanna Smith

Associate Manager of
Program Management | E-Rate

AGENDA

- About the Administrative Window
- What Changes to Make
- Requesting C2 Replacement Budget
- Start Early, End On Time!
- Update Entity Profile
- Indicating Tribal Status
- Account Administrators
- How to Update your EPC Profile During the Admin Window eLearning Module
- What if I Miss the Administrative Window?
- Administrative Window Tips



About the Admin Window

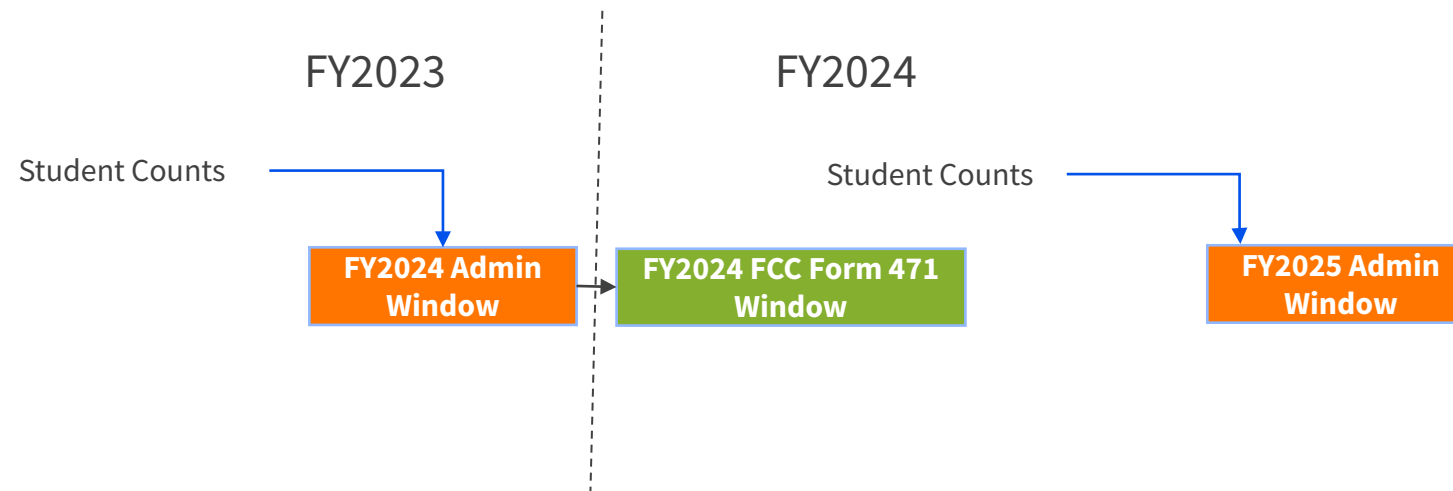
What is the Administrative Window?

- Time when applicants update their EPC entity profile information (e.g., discount rate information) for the FCC Form 471 application filing window.
 - Occurs from October to early January prior to the FCC Form 471 application filing window.
 - Official dates are announced in the E-Rate News Brief.
 - Closes as the FCC Form 471 Application Filing Window opens.
- EPC profiles are locked before the application filing window to prevent changes that impact an entity's discount rate.



Why do We Have the Administrative Window?

- Ensures consistent data for each FCC Form 471 by applicant including:
 - NSLP and full-time student counts (needed to calculate discount rates) for entities tied to a school district, library system, or consortium.
- Allows faster processing of FCC Form 471 application funding requests and reduces PIA review.
- Provides a simple self-service option for updating annual student count or entity information and reducing review time during Program Integrity Assurance (PIA) review.



What Changes to Make?

What are you updating for every Admin Window?

- EPC profile information: Address, email, etc.
- Ensure your account administrator is correct/have an account administrator
- Check user rights levels: Is there someone with full rights who can certify forms?
- Schools update student counts
- Libraries update square footage

What are you updating as needed?

- If any new entities need to be added
- Adding consultants to your account
- Replacing your Category 2 budget

What Changes to Make?

	Schools / School Districts	Libraries and Library Systems	Consortia
Account Administrator is active and current	X	X	X
Account Administrator adds new users and deactivates users that no longer work for the organization	X	X	X
Account Administrator reviews and updates all user rights by form/transaction	X	X	X
Account Administrator updates/adds consulting firm (CRN) and consulting firm users and updates rights	X	X	X
New or closed entities requested via a customer service case	X	X	X
Update entity relationships (child entities, consortia members)	X	X	X
Update student counts / library square footage; update entity subtypes / add Tribal affiliation	X	X	
Review/update entity profiles to ensure that are no errors due to missing information	X	X	
Update entity contact information and FCC registration number	X	X	X
Request an increase to your Category 2 budget, if desired	X	X	

Requesting C2 Replacement Budget

- If changes occur that could increase the budget calculation of your Library System, Independent School, or Independent Library during a five-year funding cycle, you can request that your Category Two budget be recalculated with higher student counts or square footage if you want. There is no requirement to do this.
- Partial-rights users can **update organization details**, but only users with full rights permissions will be able to request a C2 replacement budget.
- Consortium entities may **not** request replacement budgets for their members.
- Educational Service Agencies can only request a replacement budget for their own entity – not other associated members.

Start Early, End On Time!

- Administrative window updates
 - 103k schools need latest student counts
 - 21k Account Administrators
 - 2.4k new entities created each year
- Start early to allow enough time to complete all updates!
- Do not wait until the last week of the administrative window to make and request your changes
- If entity profile updates (e.g., student counts, new entities) are needed outside of the administrative window, this may slow down application review and delay your Funding Commitment Decision Letter(s).



Update Entity Profile

Update Entity Profile

- To update things like address, email, etc., you must update the Entity profile.

The screenshot displays the Appian user interface. At the top, there is a navigation bar with tabs for 'News', 'Tasks (29)', 'Records', 'Reports', and 'Actions'. Below this, the main content area is titled 'My Applicant Landing Page' and includes a 'Training' section for 'Universal Service Administrative Co.'. A red box labeled '1' highlights the 'Welcome, Independent School 702!' message. To the right, a secondary interface shows a top navigation bar with the 'appian' logo and a user profile icon. Below this, there are three buttons: 'CREATE A NEW USER', 'ADD OR REMOVE EXISTING USERS', and 'MANAGE USER PERMISSIONS'. A red box labeled '2' highlights a dropdown menu icon next to the 'MANAGE USER PERMISSIONS' button. This dropdown menu is open, showing options such as 'Manage Organization', 'Modify Account Administrator', 'Create a Customer Service Case', 'Manage General Co...', 'Manage Annexes', 'Manage Organization...', and 'Create FCC Form 470'. A red box labeled '3' highlights the 'Manage Organization' option. Below the dropdown, there is a table with columns for 'Applicant Type' and 'Status'. The table shows one entry: 'School' with 'Active' status.

News Tasks (29) Records Reports Actions

My Applicant Landing Page

Training

Universal Service Administrative Co.

Welcome, Independent School 702!

Pending Inquiries

Type -- Select a Type --

appian

CREATE A NEW USER ADD OR REMOVE EXISTING USERS MANAGE USER PERMISSIONS

Manage Organization

Modify Account Administrator

Create a Customer Service Case

Manage General Co

Manage Annexes

Manage Organization

Create FCC Form 470

Applicant Type	School
Status	Active

Update Entity Profile

- Address determines urban/rural status
- Verifies service delivery during invoicing

Modify An Organization

Name *	<input type="text" value="Test Entity - APPLICANT SCHOOL DISTRICT"/>	Organization Type	Applicant
Physical Address			
Address Line 1 *	<input type="text" value="2000 L St NW"/>	Zip Code *	<input type="text" value="20005"/>
Address Line 2	<input type="text" value="Suite 200"/>	Zip Code Extension	<input type="text" value="4924"/>
City*	<input type="text" value="Washington, District of Columbia"/>	County*	Other
State *	<input type="text" value="DC"/>	Please ensure that the address, city, state, and zip code are correct	
		Please Specify*	<input type="text" value="District Of Columbia"/>
		Please enter the name of the county and ensure that it is spelled correctly	

Update Related Entity Profiles

Records / Applicant Entities

#17010490 - Test Entity - APPLICANT SCHOOL DISTRICT

Summary Customer Service Modifications **Additional Information** Discount Rate Category Two Budget

Category Related Organizations

Relationship Type Related Entities

Entities

Entity Nu	Entity Name	Cit
17010549	Test Entity - Test NIF	Wa
17010504	Child School 1	Ne
17010548	NIF Entity	NIF
17010506	Child Entity 2	Ne



Update Entity Profile - School

- Entity types and subtypes verify eligibility
- Student counts determine your discount rate

School Information

School Sub-Type *

Public School

Private School

Check All That Apply [Show Help](#)

Pre-K

Head Start

Adult Education

Juvenile Justice

Dormitory

Charter School

Tribal School

Is this school part of a school district?

Yes

New Construction School

Swing Space

Detention Center

General-Use School

ESA School

BIE

Number of Full Time Students *

42

Total Number of Students Eligible for National School Lunch Program (NSLP) ? *

30

Community Eligibility Program (CEP)? *

Yes

No

Alternative Discount Method *

None

Indicate if an alternative discount mechanism was used to calculate the number of students eli

Updating Student Counts

- Students counts from approved FCC Form 471 are in the EPC entity profile prior to the Administrative Window
- Update your students counts based on the most recent data you have during the Administrative Window
- If you receive National School Lunch Program (NSLP) and full-time student counts after the Administrative Window closes, use them for the next Funding Year
- Request a revised C2 budget if necessary. If you're only changing your profile in EPC, it will not reset your C2 budget.

Updating Entity Profile - Library

- Library main branch and associated school district determine discount rate
- Square footage determines C2 budget

Library Information

Library Sub-Type*

Public Library

Private Library

Check All That Apply

Academic

Research

Tribal Library

Bookmobile

Kiosk

New Construction Library

Main Branch

Tribal College/University Library (for public use)

State Library Agency - Library

FSCS KEY

DC0039

FSCS SEQ

002

Category Two Budget Information

Square Footage*

10000

Square footage must be provided to qualify for Category Two funding.

Associated School District

BEN	NAME
17009864	Test Entity – Applicant School District

If this library is no longer a main branch, please unselect the Main Branch Checkbox

Search for School Districts

BEN Search

State Search

Please select a value ▼

Update Library System (Parent) and Branch (Child) Profiles

- Verify the square footage for each of your library branches and the designation of your library's main branch.
 - Library systems report square footage at the library branch level (rather than a total at the library system level).
- If you are an independent library, designate your library as your main branch.
- **Add square footage from bookmobiles and kiosks. A bookmobile or kiosk with zero square footage will not be included in the library system's C2 budget calculation.**
- For each new library entity that is currently missing in your organization's profile, USAC must create the entity for you.
- Confirm the main branch is associated with the correct school district.

Indicating Tribal Status

- There is a new entity subtype for Tribal College/University Library based on the recent FCC order
- Entities with the following Tribal subtypes will be asked to provide their Tribal Affiliation based on a dropdown menu:
 - Tribal library
 - Tribal school
 - BIE (Bureau of Indian Education)
- If one of the entity subtypes above are selected and the school or library does not meet the new definition of Tribal under the FCC order, we recommend you deselect the entity subtype accordingly
- Tribal entity eligibility will be reviewed as part of the FCC Form 471 application review process in FY24

Applicant Information

Latitude Not Found

Longitude Not Found

Urban/Rural Status Not Found

Library Sub-Type

- Public Library
- Private Library
- Academic
- Research
- Tribal Library
- Bookmobile
- Kiosk
- New Construction Library
- Main Branch
- Tribal College/University Library (for public use)
- State Library Agency - Library

Applicant Information

Latitude 45.019

Longitude -93.3712

Urban/Rural Status Urban

School Sub-Type

- Public School
- Private School
- Pre-K
- Head Start
- Adult Education
- Juvenile Justice
- Dormitory
- Charter School
- Tribal School
- New Construction School
- Swing Space
- Detention Center
- General-Use School
- ESA School
- BIE
- ESA School District with no Schools

Category Two Budget Information

Square Footage 2743

Is this school part of a school district? No

User-Entered Latitude 45.019

User-Entered Longitude -93.3712

User-Entered Urban/Rural Status Urban

Community Eligibility Program (CEP)? No

Alternative Discount Method None

Does this organization have an endowment? No

Number of Full Time Students 521

Total Number of Students Eligible for National School Lunch Program (NSLP) 273

Tribal Affiliation *

Akiachak Native Community

Q Search

Akiachak Native Community

Akiak Native Community

Alabama-Coushatta Tribe of Texas

Alabama-Quassarte Tribal Town

Alaska Native Corporation

Alatna Village

Algaaciq Native Village (St. Mary's)

FY2025 CEP Changes

- The minimum allowable Community Eligibility Provision (CEP) % changed from 40% to 25% starting in FY 2024.
- Applicants are no longer required to submit a Receipt Acknowledgement Request (RAL) for CEP % between 25-39%.
- Applicants can now update the CEP % in their EPC entity profile for 25%+.
- Reminder: Check the base year to ensure it is updated to the start of your CEP cycle.
- For more information on CEP, visit our [website](#).

User-Entered Latitude	31.0837
User-Entered Longitude	-97.5966
User-Entered Urban/Rural Status	Urban
Community Eligibility Program (CEP)?	Yes
CEP Percentage	34.55%
CEP Base Year	2022
Does this organization have an endowment?	No
Number of Full Time Students	602
Total Number of Students Eligible for National School Lunch Program (NSLP)	333

Account Administrators

Who is responsible?

- Account Administrators are responsible for updating the EPC profile during the administrative window.
- If you are unsure who your Account Administrator is, navigate to the Applicant Entity Profile page in EPC and look under the field Account Administrator.
- If your organization does not have an account administrator, call the Customer Service Center:
 - (888) 203-8100, Monday through Friday, 8 a.m. to 8 p.m. ET

EPC Account Administrator Role

- Every organization (independent school, independent library, school district, library system, consortium) with an account in EPC **needs an Account Administrator**.
 - The Account Administrator **must be an employee of the Billed Entity Number's (BEN's) school or library** and cannot be a consultant.
 - For billed entity and service provider accounts, the Account Administrator is tied to their 498 ID. See [Applicant 498](#) and [Service Provider 498](#) pages on our website.
- Consultants and Service Providers also need to create Consultant and Service Provider Accounts and Account Administrators for their EPC accounts.

EPC Account Administrator Permissions

- **Account Administrators can:**
 - Create new users.
 - Modify the rights of existing users.
 - Modify information about their organization.
 - Link or unlink their organization to consulting firms and consortia.
 - Modify (change) the Account Administrator.
 - Deactivate users who no longer work for the organization.

Account Administrator Grants User Permissions

- The Account Administrator determines which rights to grant each user.

Records / Applicant Entities
#208 - ABC School District

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

Manage User Permissions

Organization Details

Name	ABC School District	FCC Registration Number	1231231234
Address	123 Street Lawrence, KS 66046	Organization Type	Applicant
Mailing Address	123 Street Lawrence, KS 66046	Phone Number	785-555-5555
		Email	kproctor66044@gmail.com

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	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
Sam Schooldistrict	sam_schooldistrict@test.usac.org	▼	Full ▼	Full ▼	School or Library Official ▼	Full ▼	Full ▼	Full ▼
applicant1 test	applicanttest1@mailinator.com	▼	Full ▼	Full ▼	School or Library Official ▼	Full ▼	Full ▼	Full ▼

CANCEL SUBMIT

User “Rights” Levels

The Account Administrator determines which EPC users can view, create, certify, and submit FCC forms and requests. It is a good practice to review these levels annually and update where needed.

- A “Full-Rights” user **can complete and certify forms on behalf of the BEN**, update profile information, and receive all USAC communications regarding the BEN.
 - For example, you may determine that a **school or library official** should have this level.
- A “Partial-Rights” user can **create forms** (but not certify those forms) and update profile information.
 - You may decide that a general financial contact should have this access level.
- “View-Only” rights users can view (but not update) the accounts.

User Permissions

Abilities	Full Rights	Partial Rights	View Only Rights
Create Forms	X	X	-
Certify and Submit Forms	X	-	-
Update Profile	X	X	-
View Account	X	X	X
Respond to Outreach	X	-	-

Resources

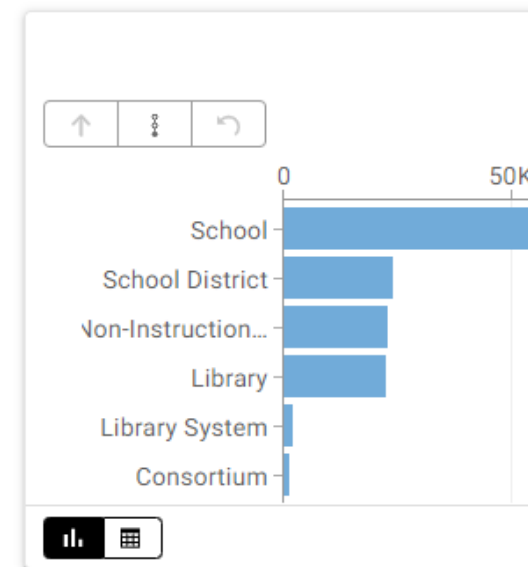
E-Rate Entity Search Tool

- The [E-Rate Entity Search Tool](#) available in Open Data so you can view and download entity data
- Once you make updates to entities in EPC, the data will show in the tool the next day
- For more information about Open Data, view our Open Data webinar trainings [here](#).

[E-Rate Entity Search Tool](#)

The E-Rate Entity Search Tool enables the search of E-Rate Productivity Center (EPC) information about schools, libraries, school districts, library systems, consortia, and non-instructional facilities (NIFs). For Annexes information, please refer to the ["E-Rate Supplemental Entity Information: Annexes"](#) dataset.

Watch the [video walkthrough](#) to learn how to use the tool.



How to Update your EPC Profile During the Administrative Window eLearning Module (eLM)

- Explaining User Permissions
- Updating Profile
- Requesting C2 Budget Replacement
- Reporting Student Counts
- [How to Update Your E-Rate EPC Profile During the Administrative Window](#)

The screenshot shows the title page of an eLearning module. On the left, there is a dark blue vertical banner with the text "Interactive User Guide and eLearning Module" at the top. Below this, there is a close-up image of network cables plugged into a switch. At the bottom of the banner is the Universal Service Administrative Co. logo and the tagline "Connecting Millions to Broadband Services". The main content area has a light blue background with a geometric pattern. It features the title "How to Update Your E-Rate EPC Profile During the Administrative Window" in large blue font. In the top right corner of the main area is the Universal Service Administrative Co. logo. At the bottom right, there is a prominent blue button with the word "Start" in white text.

What if I Miss the Administrative Window?

Once the Administrative Window Closes, the filing window for the FCC Form 471 applications will begin shortly after:

- EPC profiles are now “locked”: No new changes can be made that affect an entity’s discount calculation.
- Applicants would need to submit a Receipt Acknowledgement Letter (RAL Modification) after certifying their FCC Form 471.

To file a Modification Request (RAL), follow these instructions:

1. Find and open the appropriate FCC Form 471. You can find your forms on your Landing Page under Forms and Post-Commitment Requests, or from your entity Summary page under FCC Forms.
2. Filter the forms by FCC Form 471, Funding Year, and Certified.
3. Click on the FCC Form 471 that you want to update.
4. Near the top of the page (under the form name), click "Related Actions."
5. Click "Submit Modification Request (RAL)."

Administrative Window Tips

- Start early and do not wait until the last minute!
- Ensure your Account Administrator is active.
- Leverage EPC self-service capabilities.
- Request new entities via a customer service case early in the window.
- Leverage the open data tool to review existing and updated entity data.
- Set yourself up for success for FCC Form 471 application window.
- Help us help you!



Live Q&A

- Submit your questions about today's topics:
- About the Administrative Window
- What Changes to Make
- Requesting C2 Replacement Budget
- Start Early, End On Time!
- Update Entity Profile
- Indicating Tribal Status
- Account Administrators
- How to Update your EPC Profile During the Admin Window eLearning Module
- What if I Miss the Administrative Window?
- Administrative Window Tips

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- Audio Section:** Includes a "Sound Check" indicator, "Computer audio" selected, "MUTED" status, and dropdown menus for "Microphone Array (Realtek High Defi...)" and "Headphone (Realtek High Definition...)".
- Handouts Section:** Labeled "Handouts: 1" with a file named "Invoicing Webinar Slides.pptx".
- Questions Section:** A box labeled "ENTER YOUR QUESTION HERE" with a "Send" button. A red arrow points to this box from the "Questions" header.
- Footer:** Displays the webinar title "Navigating the E-rate Invoicing Proc...", the ID "Webinar ID: 276-354-307", a recording status "This session is being recorded.", and the "GoToWebinar" logo.

Q&A Tips

- ✓ Type your queries into the "Questions" box in your webinar control panel.
- ✓ Write in full sentences.
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- ✓ Click the box with the arrow above the questions box to expand it and see all the written answers.

Questions?

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Upcoming Webinars

Our upcoming Fall Training webinars:

- E-Rate Fall Training: Post Commitment, October 31, 2024
 - E-Rate Fall Training: Invoicing, November 7, 2024
 - Recommended for applicants and service providers
 - Suitable for all E-Rate experience levels
-
- Subscribe to the [E-Rate News Brief](#).
 - Please visit the E-Rate [Webinars](#) page for additional information.

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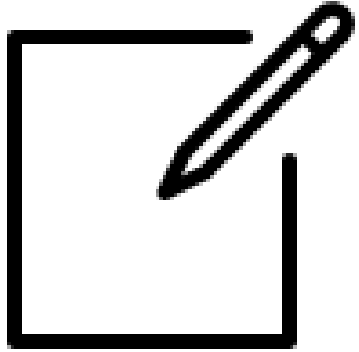
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Take Our Survey



- We want to hear about your webinar experience.
- A survey will appear on your screen at the end of the webinar.
- If you are not able to complete the survey today, one will be emailed to you within two business days.
- We appreciate your feedback!

Thank You!





**Universal Service
Administrative Co.**