Applicant Process

Before You Begin

Step 1: Create an EPC Account

Step 2: Competitive Bidding

Step 3: Select Service Providers

Step 4: Apply for Discounts

Step 5: Application Review

Step 6: Start Services

Step 7: Invoice USAC

Before You're Done

‹ Before You Begin Step 2 ›

Step 1: Create an EPC Account

To begin the E-Rate program cycle, applicants must first create an account in E-Rate's online portal, known as the E-Rate Productivity Center (EPC).

About the E-Rate Productivity Center (EPC)

EPC allows school districts or library systems to file E-Rate program forms, receive notifications, and conduct other program activities. Independent schools and libraries, consortia, and statewide applicants may also have accounts in EPC.

EPC entities must have an Account Administrator who manages the account, grants rights to other users, and provides or updates information on the individual schools or libraries within the school district or library system. The Account Administrator must be an employee of the school or library organization.

EPC Accounts and Entity Types

Organizations configuring a new EPC account will be asked to assign an entity type to the account. EPC entity types are as follows:

- Individual school
- Individual library
- School district
- Library system

Note: Converting an entity type is only possible in limited scenarios. Because not all conversions are guaranteed, it's important to ensure the entity type is correct in the initial creation process.

For more information about entity types, call E-Rate's Customer Service Center (CSC) at (888) 203-8100. The CSC is open Monday through Friday, 8 a.m. to 8 p.m. ET. View the documentation required when contacting the CSC.

Create Your EPC Account: Checklist

When you have determined which entity type you will select, you can move forward with account creation. There are two steps, which you can do in any order:

- Register for an FCC Registration Number (FCC RN) using the FCC's Commission Registration System (CORES).

- Obtain a Billed Entity Number (BEN) by calling E-Rate's Customer Service Center (CSC) at (888) 203-8100.
    - Refer to the CSC documentation guide for a list of the information that is required to create a BEN.

After requesting a BEN, you (as the user on the BEN's entity profile) will receive an email directing you to set an EPC password, accept the platform's terms and conditions, and configure multi-factor authentication. Once you have accepted EPC's terms and conditions, you will appear as a valid user on the BEN's EPC profile.

You should then contact the CSC to request that you be designated as the (sole) Account Administrator for their entity. In this role, you can add other users, add a consulting firm and consultant users, and assign rights to perform various actions.

Next Steps

Following the creation of your EPC account, your next step is to begin the process of competitive bidding (completing the FCC Form 470).

Source: https://www.usac.org/e-rate/applicant-process/create-an-epc-account/ · page last modified Aug 12, 2026 · captured Nov 1, 2026

One Portal and Multi-Factor Authentication/ E-Rate Productivity Center (EPC)

One Portal – Multi-Factor Authentication (MFA)

In order to complete online E-Rate forms, the user must have an account and be set up in the USAC master online system, One Portal, with multi-factor authentication (MFA). MFA is required to comply with federal security requirements. After entering One Portal, the user may access the E-Rate Productivity Center (EPC) Portal.

The One Portal MFA requires the user to enter two or more separate pieces of information, such as a user password and a validation code that is e-mailed or texted to the user, in order to gain access to the USAC online filing systems.

The set-up process requires several steps that are illustrated in the One Portal/MFA Set Up Guide that is part of this Resource Manual.
Notes:

- **Technical Hints:** Before you begin:
  - ✓ Be sure to use a Chrome or Firefox browser
  - ✓ Disable all privacy features (such as EFF Privacy Badger)

If you are not currently an EPC or BEAR authorized user (meaning your e-mail address isn't in the USAC system), or if you experience problems setting up your One Portal account, call CSB at 888-203-8100.

E-Rate Productivity Center (EPC)

The E-Rate Productivity Center (EPC) is the account and application management portal for the Schools and Libraries (E-Rate) Program that was introduced in FY 2016. Applicants, consultants, and service providers participating in the E-Rate Program must use this system to submit forms, manage program processes and to submit questions via customer service cases.

The Form 470, Form 471, Form 486, Form 472, Form 500 and Form 498, and all post-commitment functions such as SPIN changes, service substitutions and appeals, are submitted within each applicant's EPC portal.

Each applicant's portal is managed by their School or Library's Account Administrator (AA). Only the AA can create new users for the school or library, reassign the AA responsibility to another user within the organization, and set up user permissions to file and/or certify various forms.

If you are not sure whether your organization's EPC portal has been set up, contact the Customer Support Center at 888-203-8100 to ask. The following documents in this Resource Manual contain the specific instructions for how to set up your EPC portal, including the following tasks:

- One Portal – MFA Set Up Guide
- How to Log-In to EPC

- How to Reset your EPC Password
- How to Change Account Administrators (only AA can do)
- How to Create New EPC Users and Change User Permissions (only AA can do)
- How to Link to a Consortium
- How to Add a Consulting Firm (only AA can do)
- How to Update Building Entity Data

One Portal
MultiFactor Authentication
Set Up Guide



One Portal Basics

- USAC has created One Portal, a log-in system to create better security with multi-factor authentication (MFA).
- All users will log in to One Portal to enter EPC, accessible by clicking on the blue **Sign In** button at the top of the main page of the USAC website.

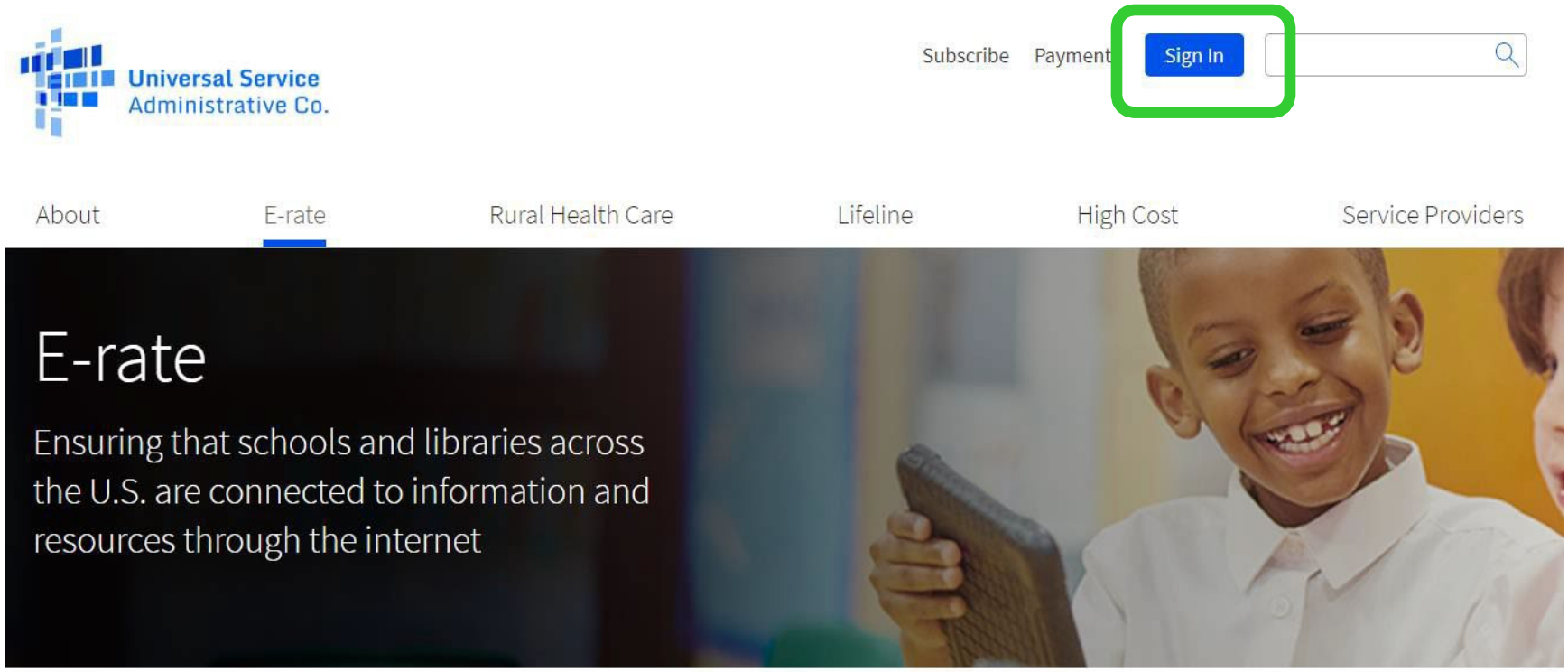


- MFA is required to comply with federal electronic security requirements.
- Two forms of authentication are required before you can access EPC.

One Portal Set-Up

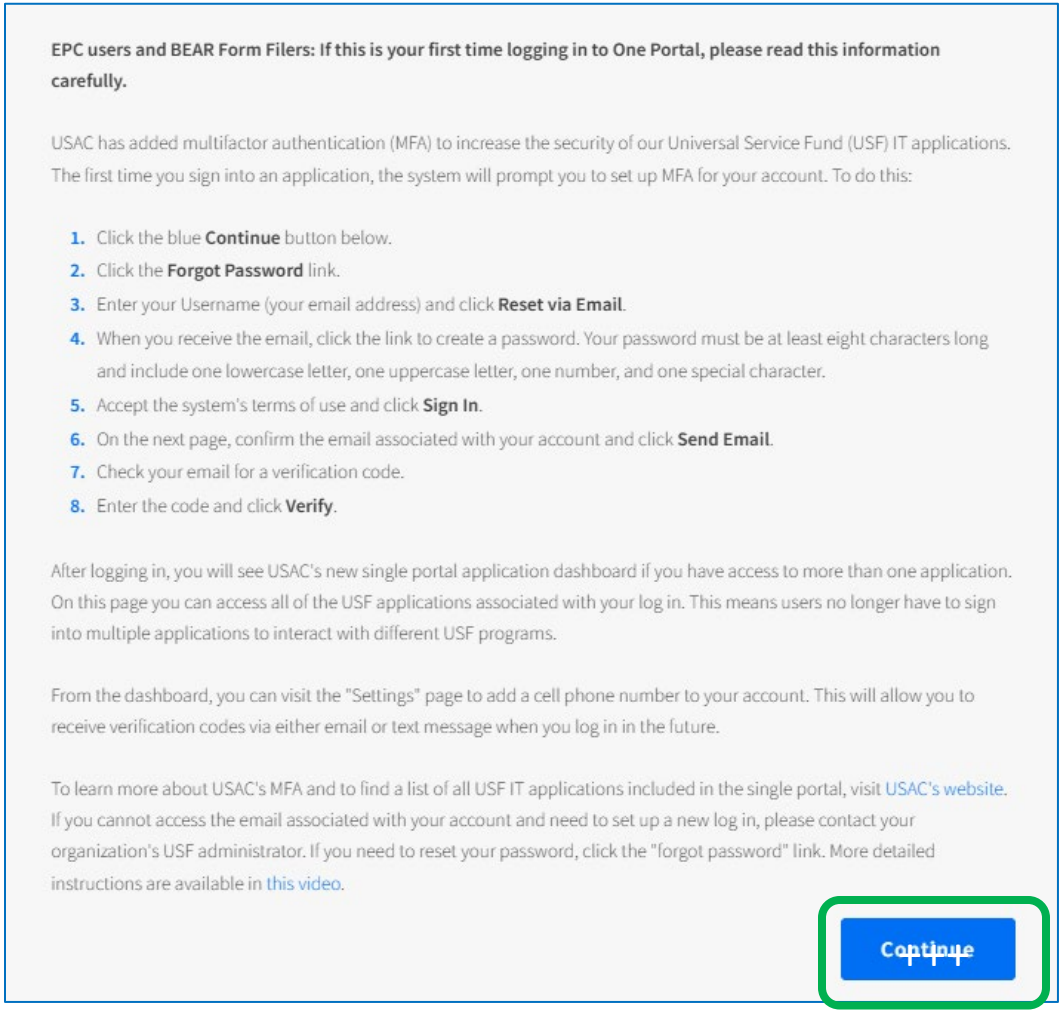
- A multi-step process is required to initially set up your One Portal account and establish your MFA validation options.
- Before you begin:
  - Be sure to use Chrome or Firefox browsers
  - Disable all privacy features
- If you are not currently an EPC or BEAR authorized user (meaning your e-mail address isn't in the USAC system), or if you experience problems setting up your One Portal account, call the E-rate Customer Service Center at 888-203-8100.

Logging in to One Portal (1P)



Intro Screen

- This screen will appear each time you log in to One Portal.
- Click Continue:



EPC users and BEAR Form Filers: If this is your first time logging in to One Portal, please read this information carefully.

USAC has added multifactor authentication (MFA) to increase the security of our Universal Service Fund (USF) IT applications. The first time you sign into an application, the system will prompt you to set up MFA for your account. To do this:

1. Click the blue **Continue** button below.
2. Click the **Forgot Password** link.
3. Enter your Username (your email address) and click **Reset via Email**.
4. When you receive the email, click the link to create a password. Your password must be at least eight characters long and include one lowercase letter, one uppercase letter, one number, and one special character.
5. Accept the system's terms of use and click **Sign In**.
6. On the next page, confirm the email associated with your account and click **Send Email**.
7. Check your email for a verification code.
8. Enter the code and click **Verify**.

After logging in, you will see USAC's new single portal application dashboard if you have access to more than one application. On this page you can access all of the USF applications associated with your log in. This means users no longer have to sign into multiple applications to interact with different USF programs.

From the dashboard, you can visit the "Settings" page to add a cell phone number to your account. This will allow you to receive verification codes via either email or text message when you log in in the future.

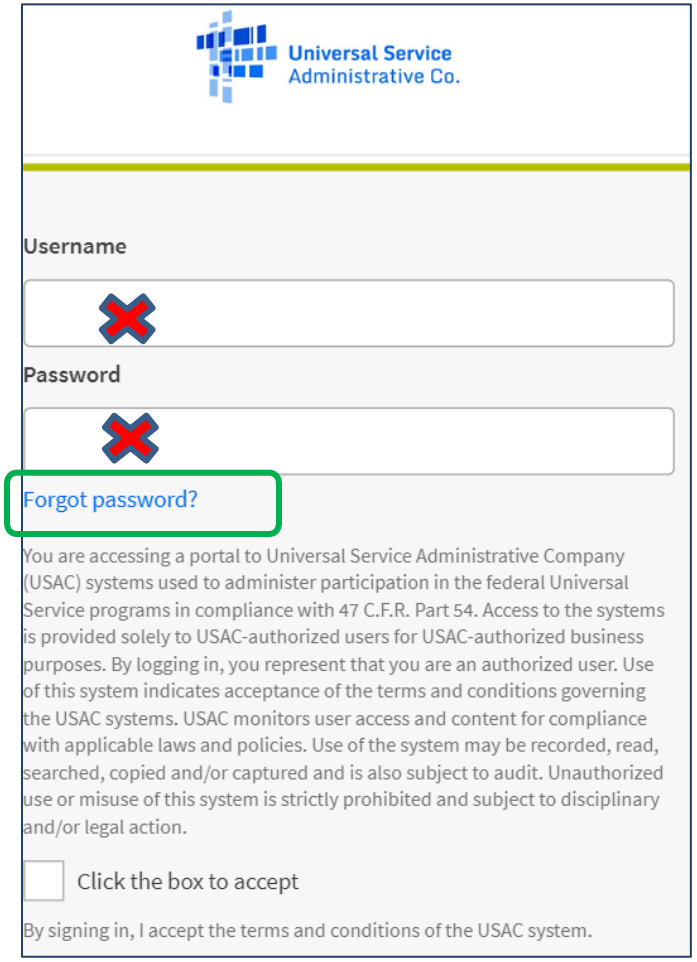
To learn more about USAC's MFA and to find a list of all USF IT applications included in the single portal, visit USAC's website. If you cannot access the email associated with your account and need to set up a new log in, please contact your organization's USF administrator. If you need to reset your password, click the "forgot password" link. More detailed instructions are available in this video.

Continue

Initial Set-Up

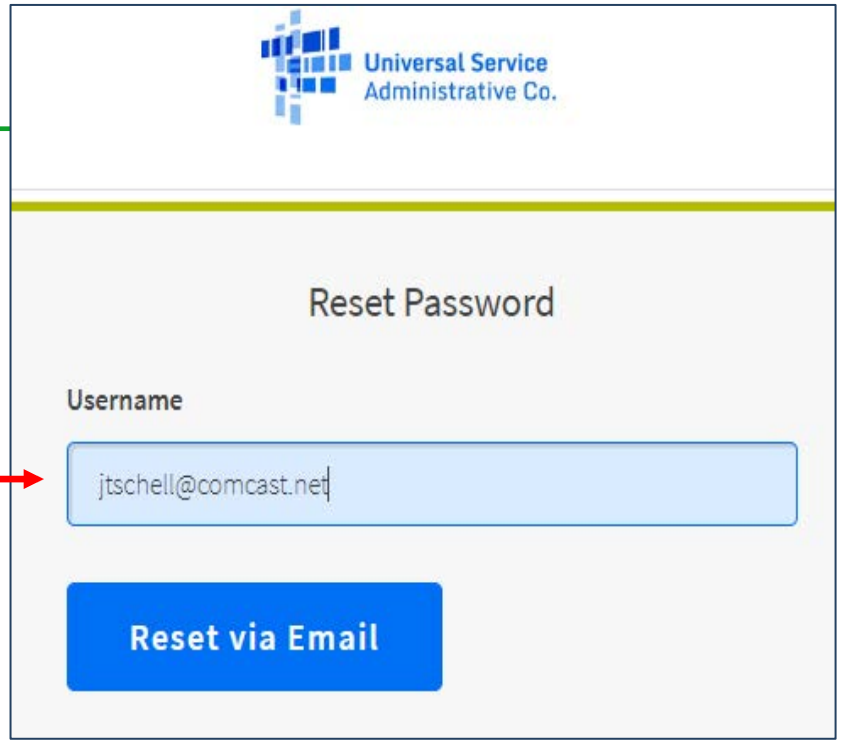
Click **Forgot Password** –

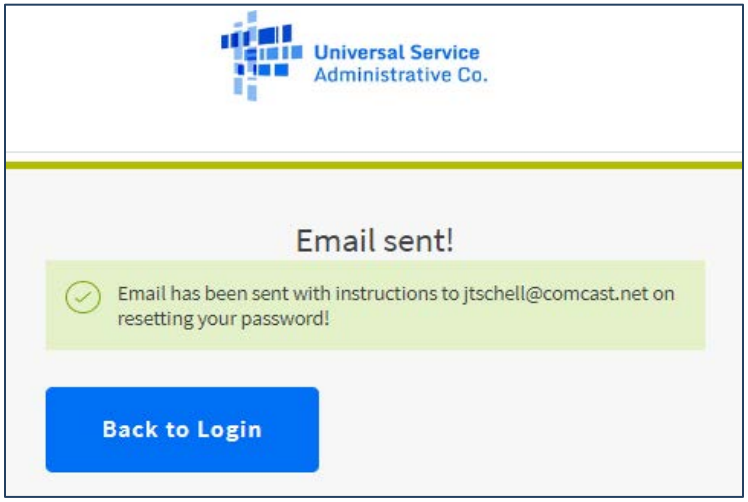
Do **not** enter Username/Password



Reset Password

Enter EPC Username which is the e-mail address you normally use to log into EPC (and the BEAR system).



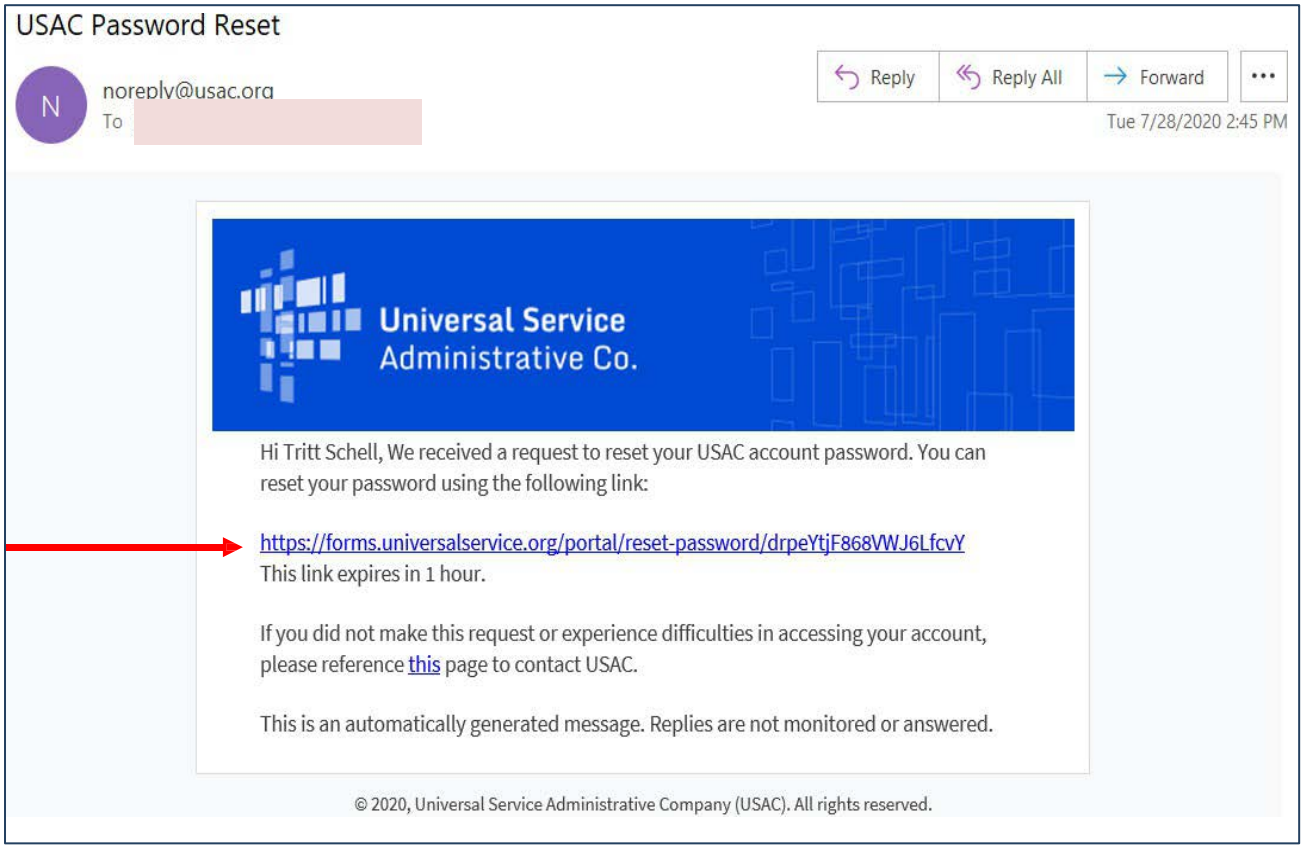


Message will display indicating you have been sent an e-mail with instructions for resetting your password. Next step: Check your e-mail!

Initial Set-Up Continued

Check e-mail for a USAC Password Reset message from noreply@usac.org. Link in message will only be valid for 1 hour.

Click on link:

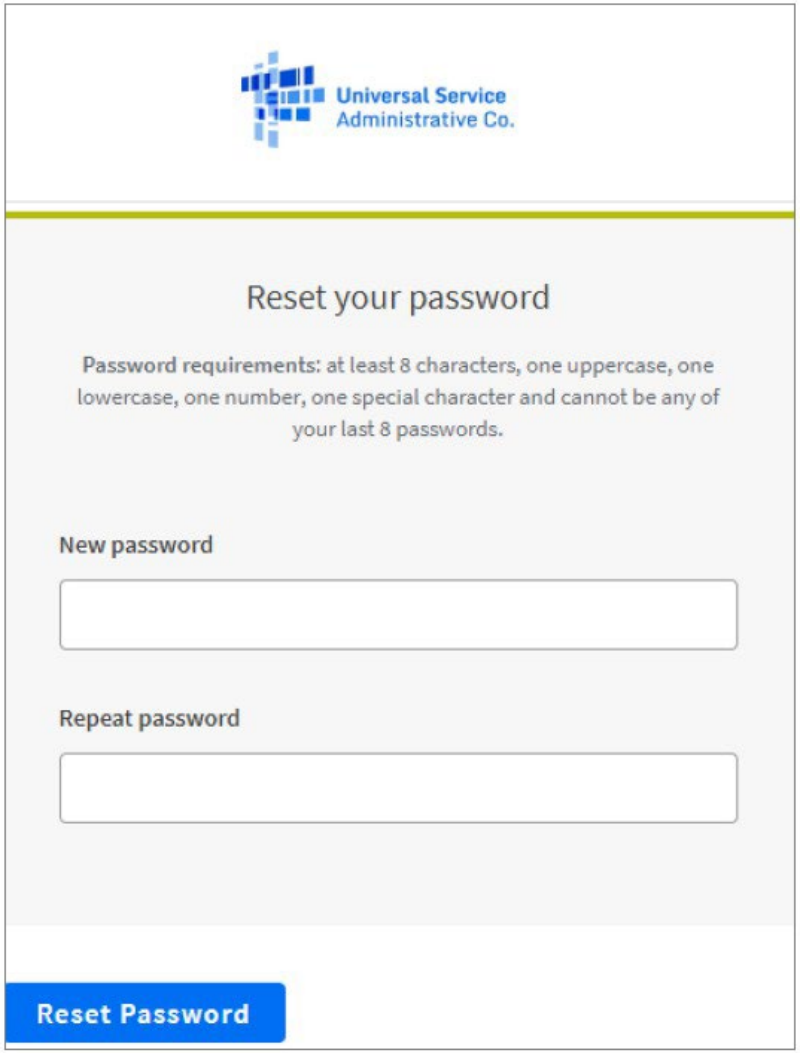


Setting Up Password

Enter desired password and repeat.

Requirements:

- At least 8 characters
- One uppercase
- One lowercase
- One special character
- Cannot be any of your last 8 passwords

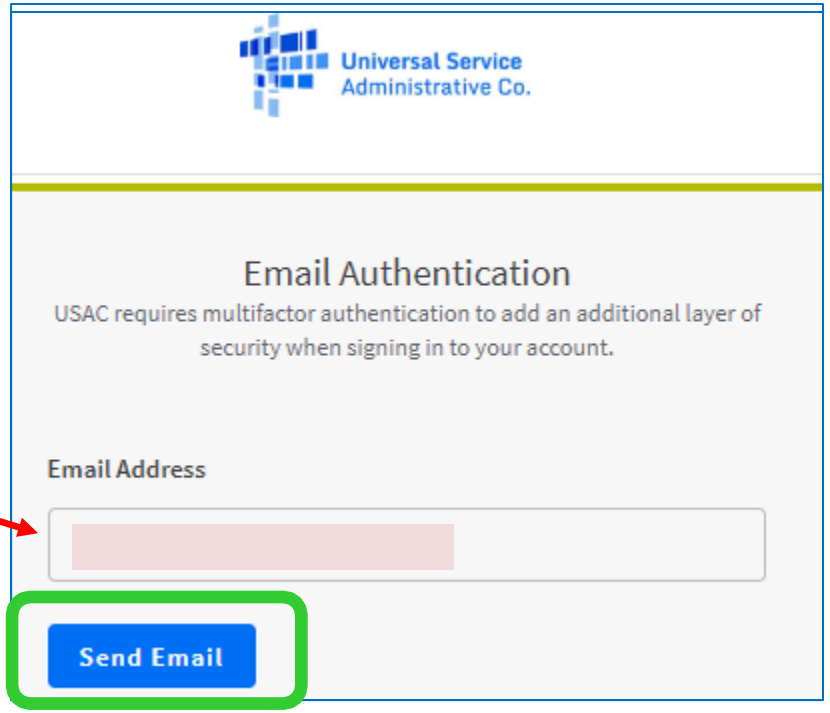


Initial Set-Up: E-mail Authentication

System will now authenticate your e-mail address.

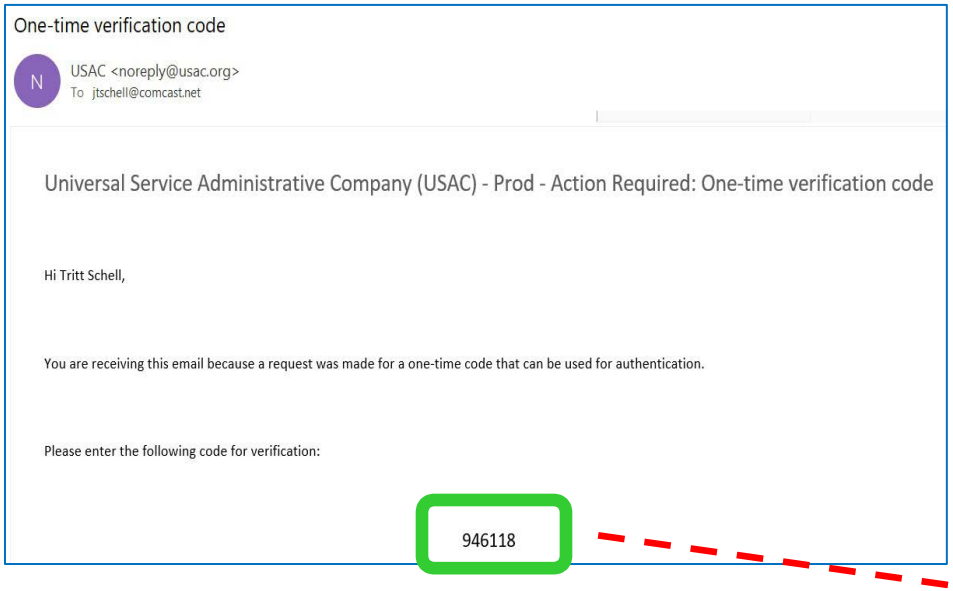
Note: e-mail address is pre-populated in text box (only a portion will be shown).

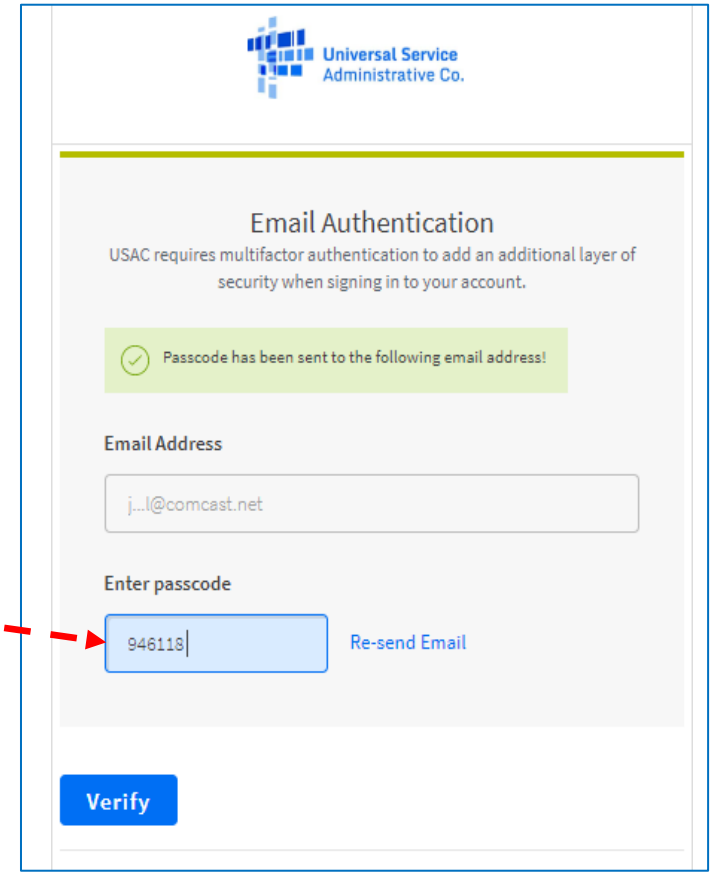
Click Send E-mail to have the authentication code sent to your e-mail address.



E-mail Authentication

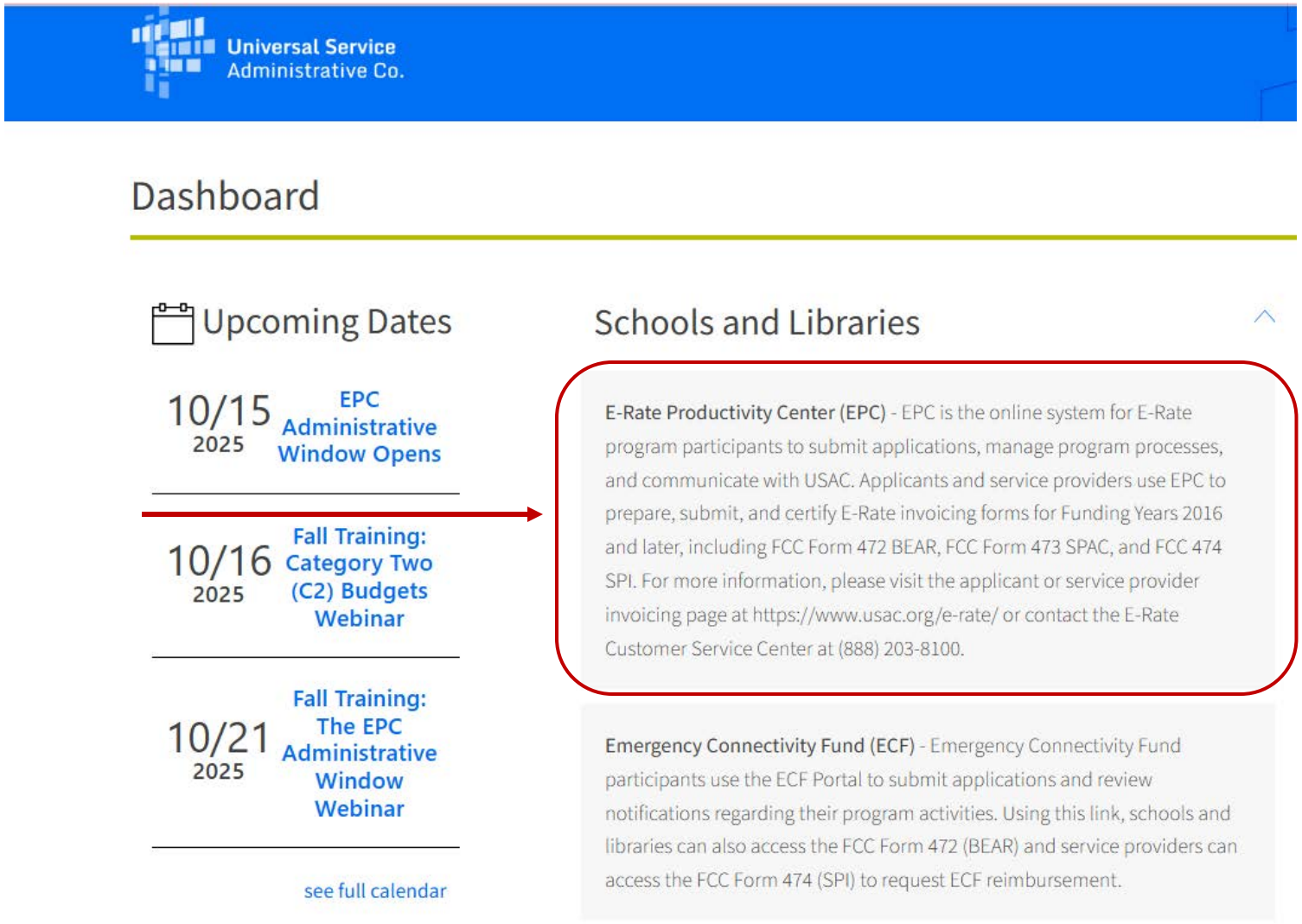
Next: Check your e-mail for a verification code. E-mail will look like this:





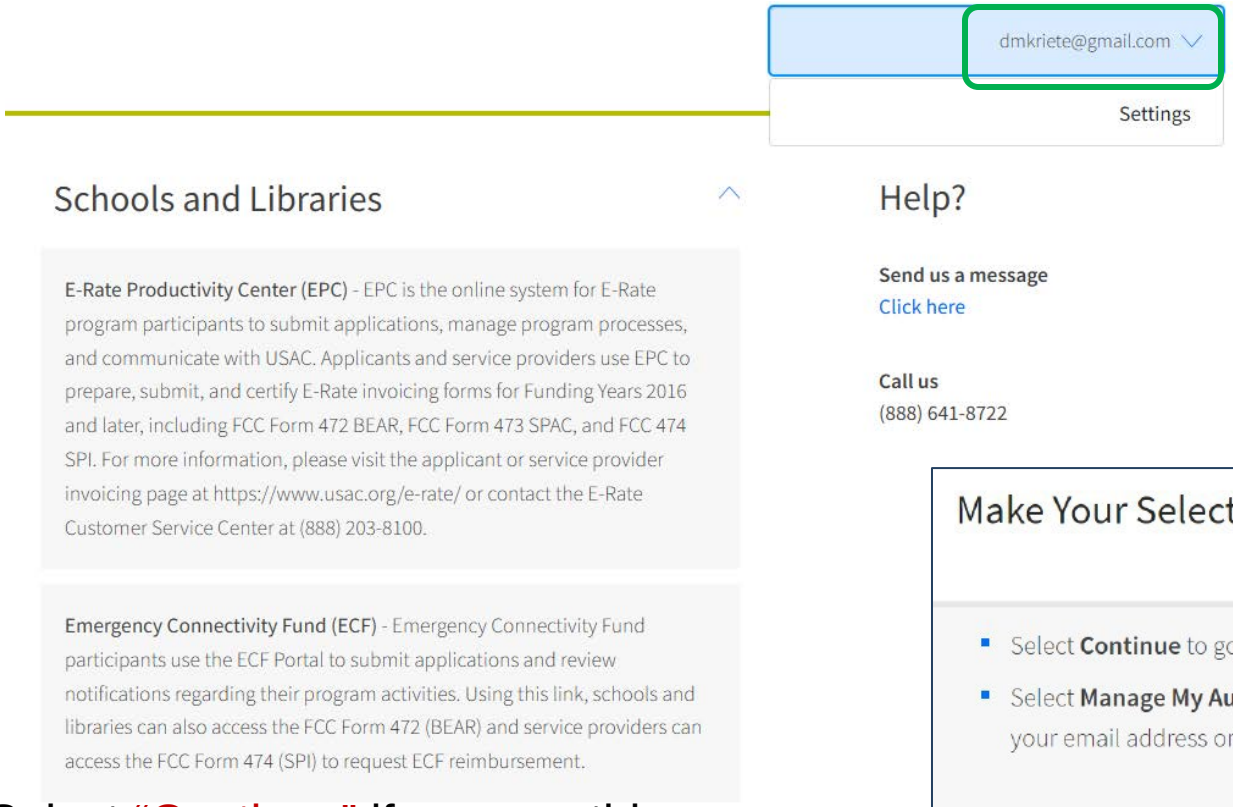
Next: Enter the verification code and click Verify.

Dashboard: You're In!

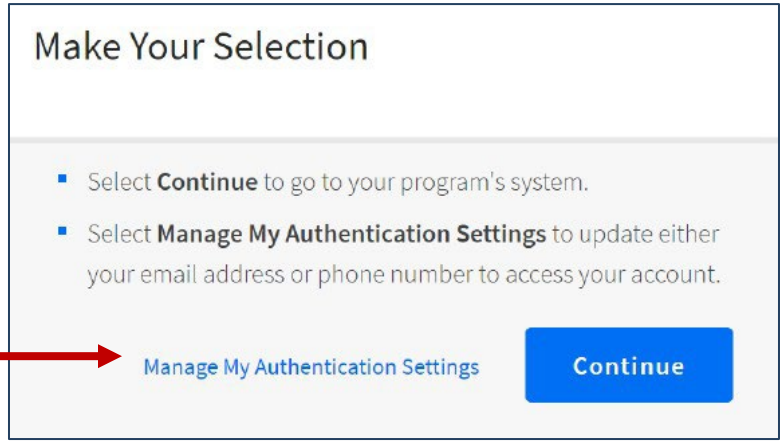


Adding Text MFA Option

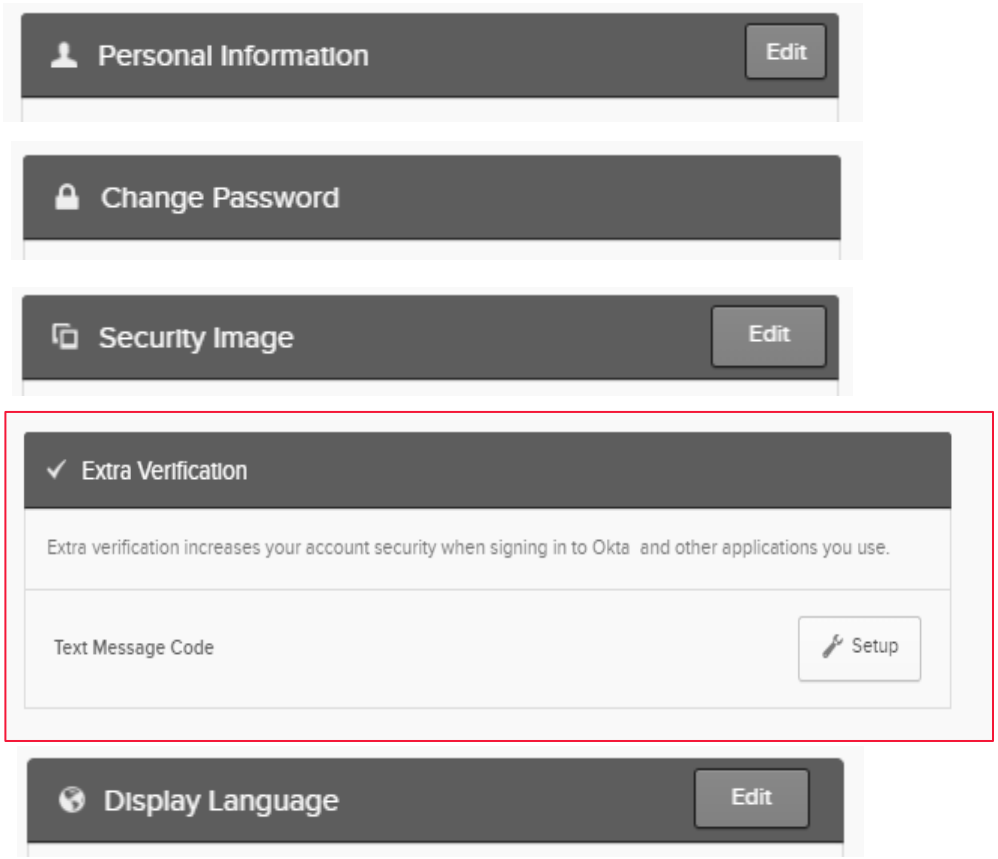
Click your Username (email address) in the top right corner of Dashboard, then Settings to change your profile/settings, including adding text authentication.



Or Select "Continue" if you see this screen.



Updating Settings/Profile

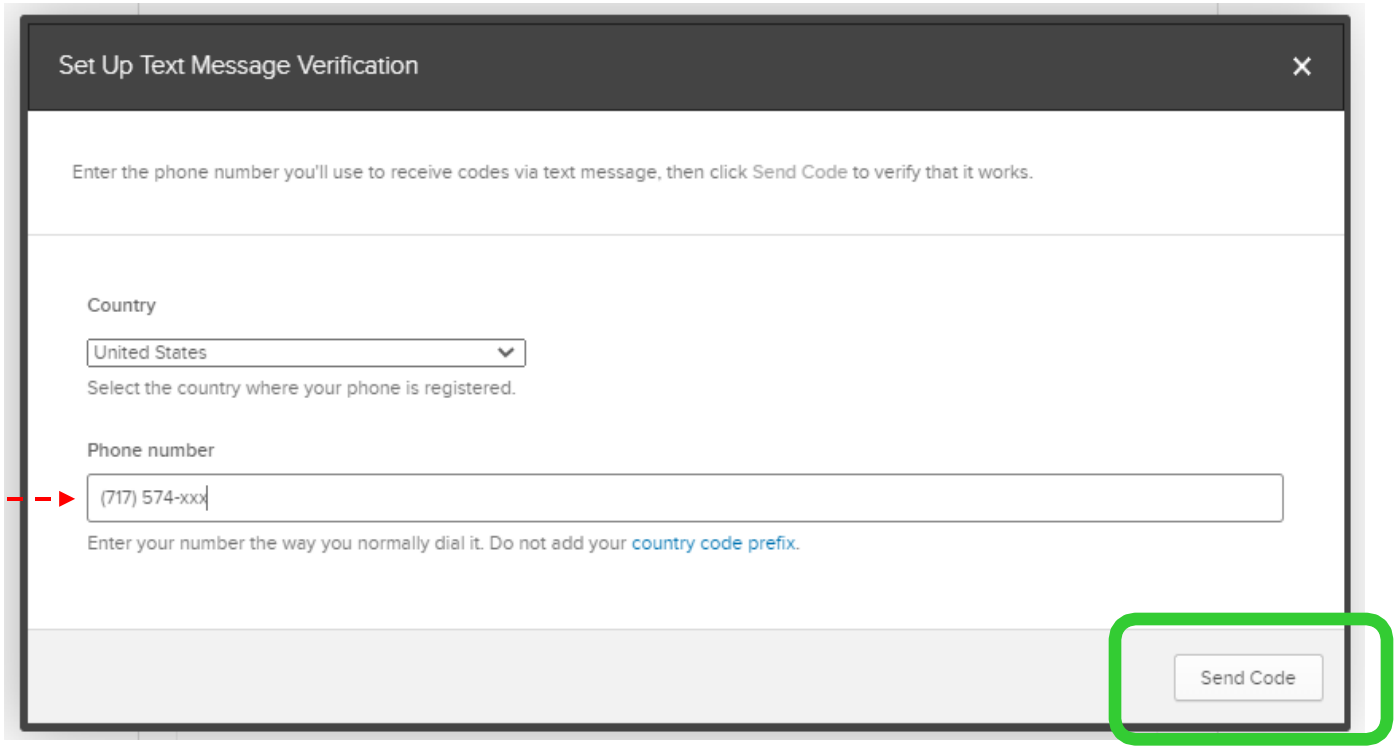


On this page, you can add or modify any of these items.

To add the option of receiving verification codes via text to your cell phone, click on Extra Verification, then Setup.

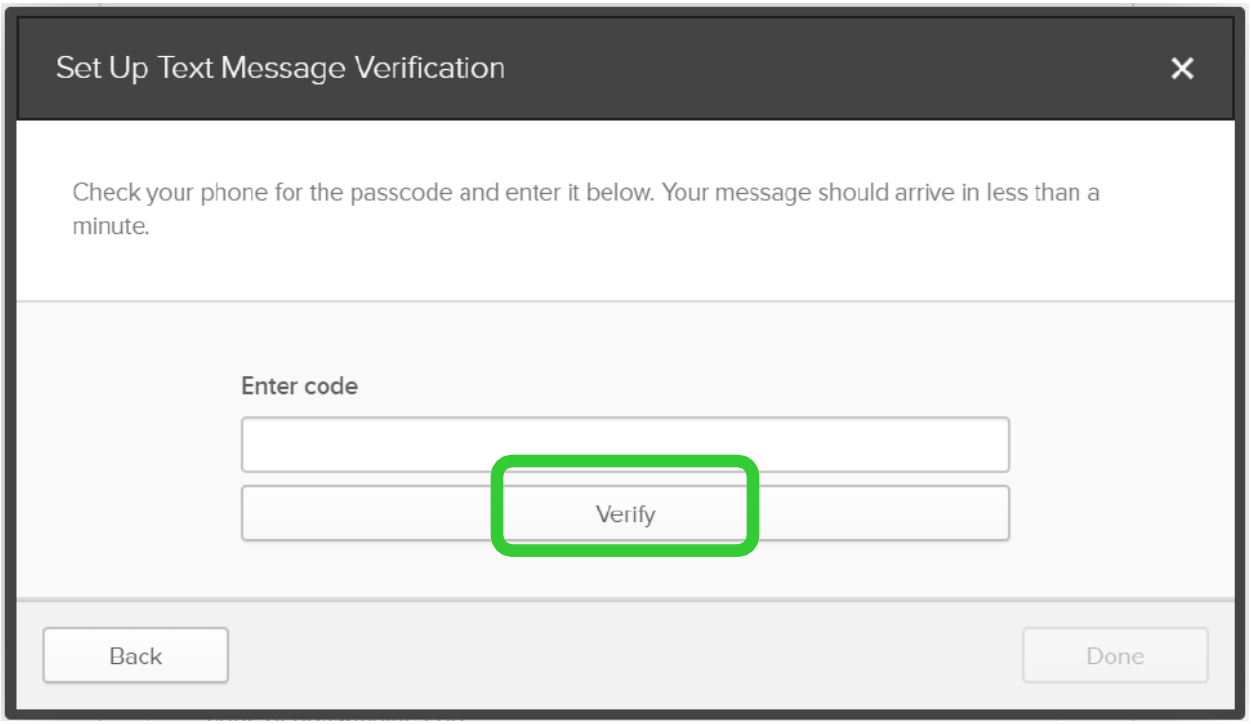
Text MFA Option

Enter your cell phone number, then click Send Code. A validation code will immediately be sent via text.

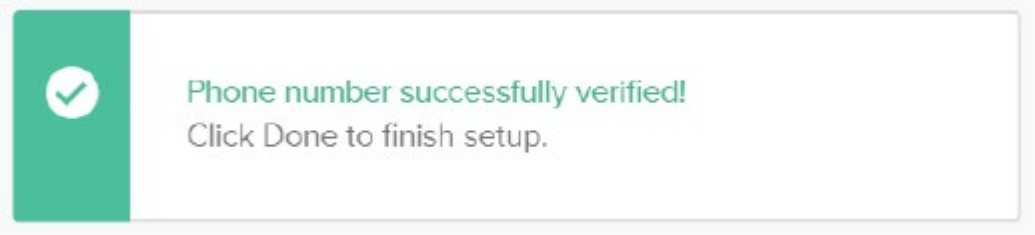


Using Text for MFA Code

Enter the code you received, then click Verify.

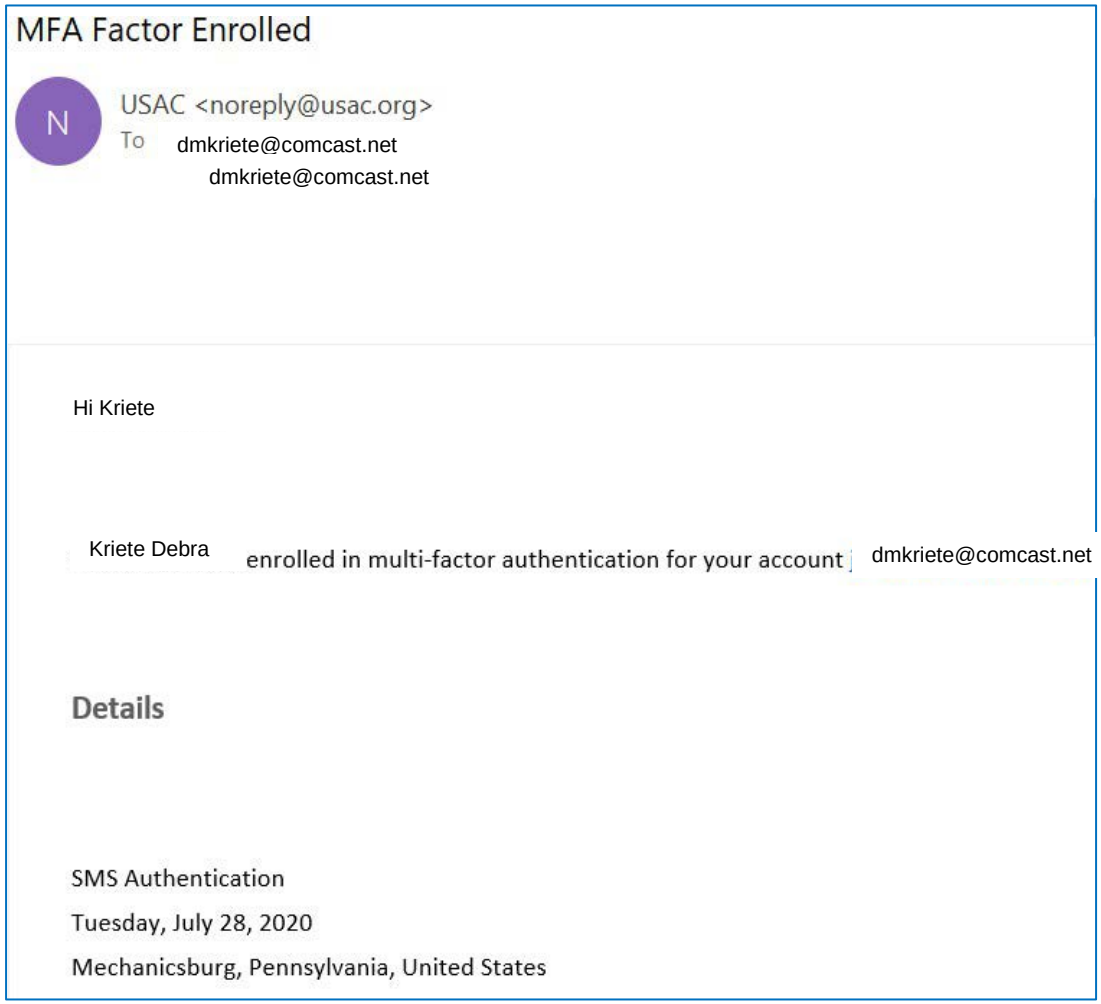


You'll receive this message if your code was validated. Click Done.



MFA Option - Text

An e-mail confirmation will be sent, confirming that you've successfully entered an additional MFA option.


MFA Factor Enrolled

N

USAC <noreply@usac.org>

To dmkriete@comcast.net

dmkriete@comcast.net

Hi Kriete

Kriete Debra enrolled in multi-factor authentication for your account dmkriete@comcast.net

Details

SMS Authentication

Tuesday, July 28, 2020

Mechanicsburg, Pennsylvania, United States

Adding Additional E-mail Address MFA

- You can also choose to receive verification codes to an e-mail address that is different from your account login username e-mail address and/or include a second e-mail address MFA option.
  - This will not change the username address you use to log in to One Portal.
- Go to Personal Information on the Settings page and click Edit



Done! Logging-In to One Portal

From now on, to get to One Portal (for either EPC or BEARs), go to either:

https://forms.universalservice.org/portal/login

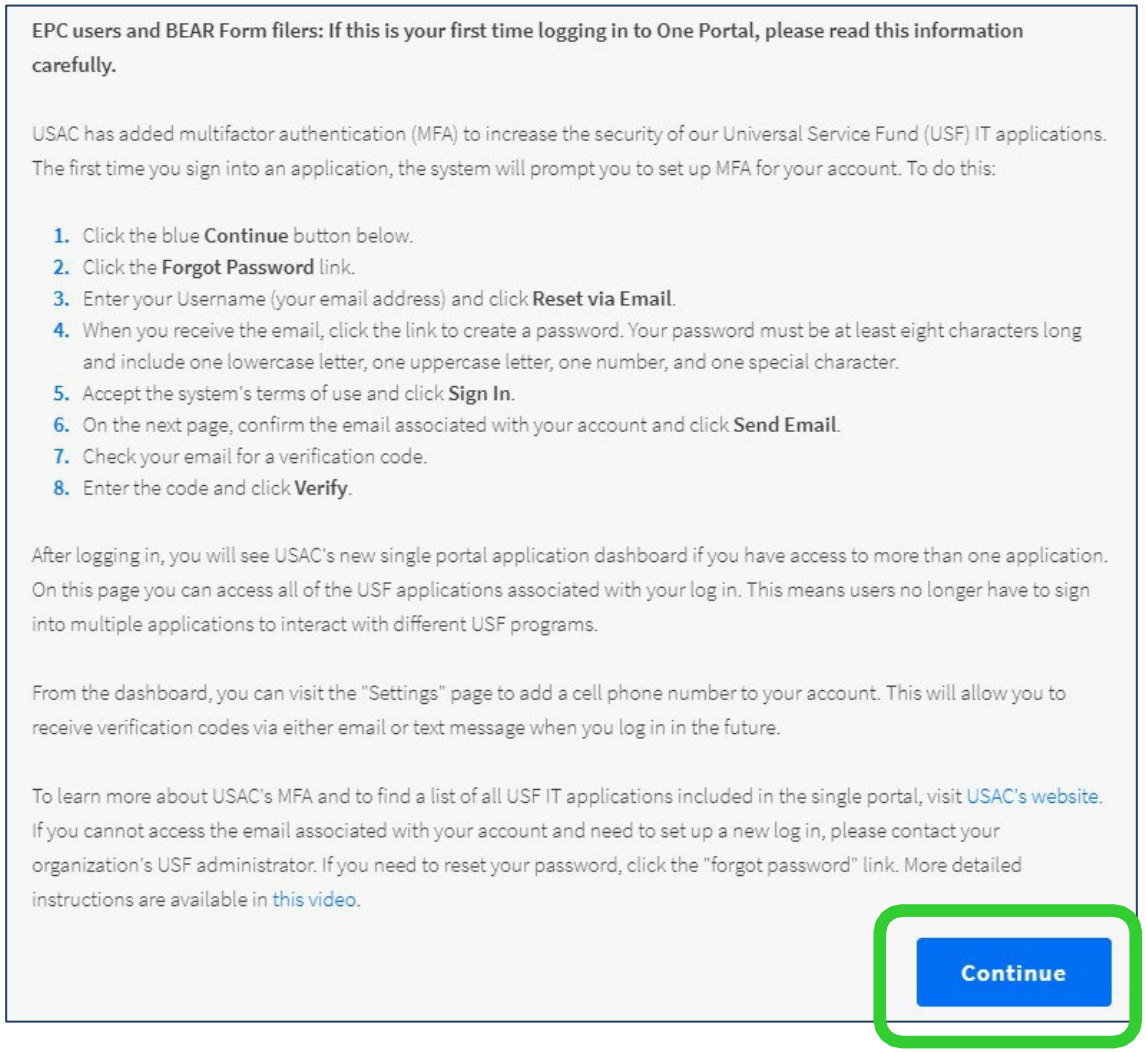
or

Click on Sign In from SLD Home Page



Logging-In to One Portal

First screen will always look like this. Click Continue to proceed to the log-in screen.



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1. Click the blue **Continue** button below.
2. Click the **Forgot Password** link.
3. Enter your Username (your email address) and click **Reset via Email**.
4. When you receive the email, click the link to create a password. Your password must be at least eight characters long and include one lowercase letter, one uppercase letter, one number, and one special character.
5. Accept the system's terms of use and click **Sign In**.
6. On the next page, confirm the email associated with your account and click **Send Email**.
7. Check your email for a verification code.
8. Enter the code and click **Verify**.

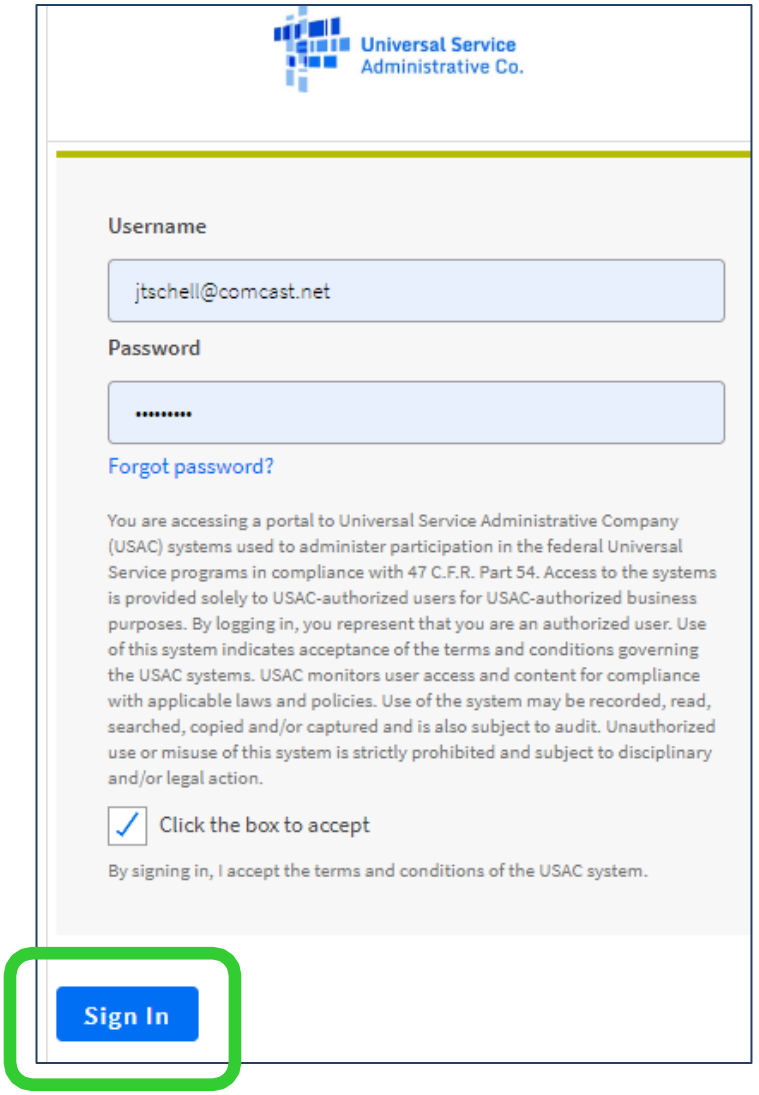
After logging in, you will see USAC's new single portal application dashboard if you have access to more than one application. On this page you can access all of the USF applications associated with your log in. This means users no longer have to sign into multiple applications to interact with different USF programs.

From the dashboard, you can visit the "Settings" page to add a cell phone number to your account. This will allow you to receive verification codes via either email or text message when you log in in the future.

To learn more about USAC's MFA and to find a list of all USF IT applications included in the single portal, visit USAC's website. If you cannot access the email associated with your account and need to set up a new log in, please contact your organization's USF administrator. If you need to reset your password, click the "forgot password" link. More detailed instructions are available in this video.

One Portal Signing In

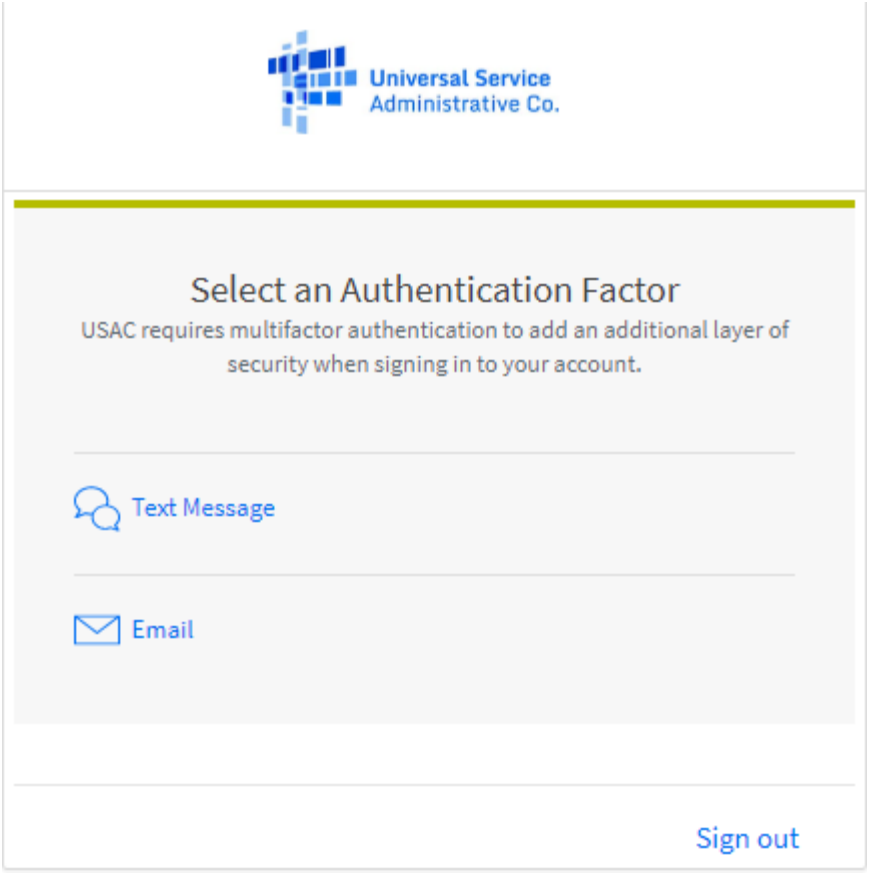
Enter your credentials,
and click Sign In:



Authentication

Choose which method you'd like to use to authenticate your visit to One Portal, then check your phone or email for the verification code.

Note: the choices shown will vary based on how you set up your account.



Resources

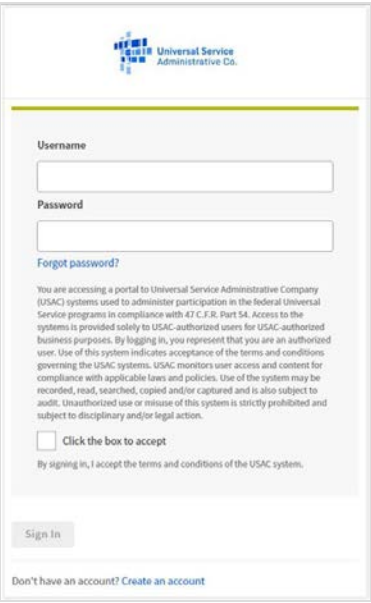
- Announcements
- Appeals and Audits
- Forms & Instructions
- Glossary of Terms
- Multi-Factor Authentication
  - Multi-Factor Authentication
  - **MFA Sign-On Instructions**
  - Single Sign-On Dashboard
  - Password Reset and Requirements
  - Text Verification Codes
  - MFA Troubleshooting FAQs
- Quick Links
- Upcoming Dates

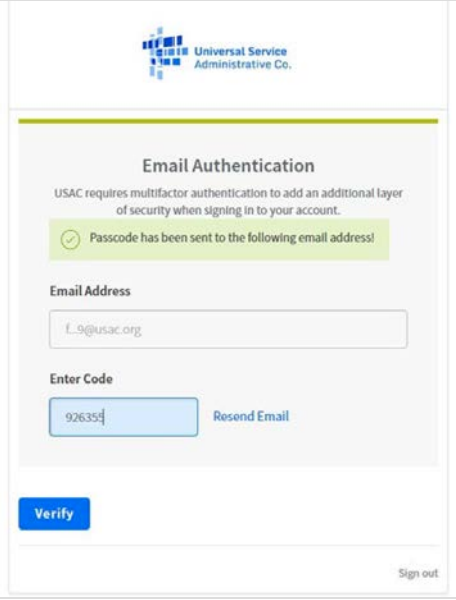
MFA Sign-On Instructions

To sign into an application using MFA:

1. Enter your user name (email) and password
2. Accept the system's terms of use and click "sign in"
3. On the next page, confirm the email associated with your account and click "send email"
4. Check your email for a sign in code
5. Enter the code and click "verify"

This video walks users through the MFA sign on process.





Source: https://www.usac.org/service-providers/resources/mfa-sign-on-instructions/ · page last modified Apr 15, 2025 · captured Nov 1, 2026

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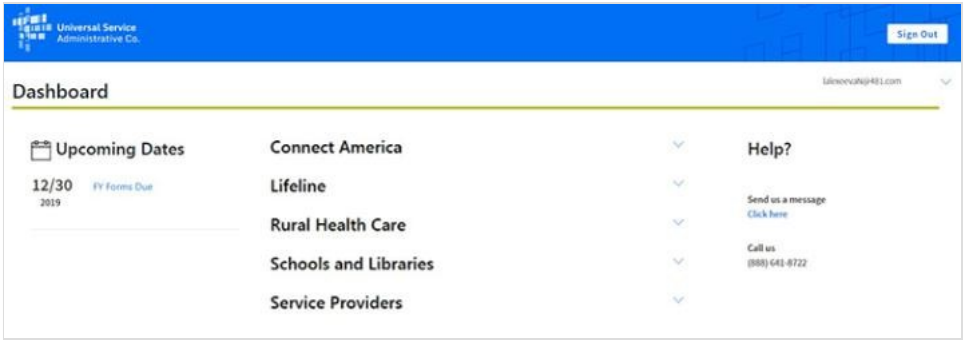
Single Sign-On Dashboard

USAC's single portal dashboard allows users to access all of their USF IT applications through the same sign-on process. After signing in with the MFA process, users with access to more than one USAC system will see a dashboard listing all of the systems associated with their credentials. The dashboard includes upcoming dates and deadlines for programs associated with the user.

Users who only have access to a single USF system or application will see an account management page when they log on. This page allows them to make updates to their account or go directly to their USF system or application.

To access a USF system, users click the arrow next to the associated program to expand the dashboard list and then select the system from the list.



Source: https://www.usac.org/service-providers/resources/single-sign-on-dashboard/ · page last modified Aug 27, 2026 · captured Nov 1, 2026

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- Quick Links
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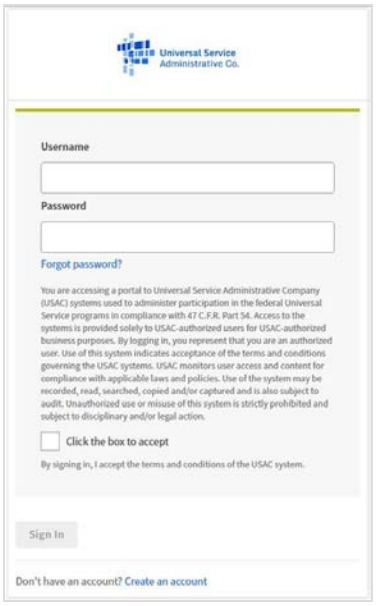
Password Reset and Requirements

For added security, users must update their system password every 90 days.

USF application and system users can change account passwords or reset a lost password through the log in screen.
To update or change a password:

1. Select “Forgot Password” on the sign on screen
2. Enter your username (primary email address) and click the “Reset via email” button
3. USAC will send you an email to set up a new password
4. Click the link in the email and enter your new password



This video walks users through the password reset process.

Password Requirements

Passwords must contain:

- At least 8 characters
- One uppercase letter
- One lowercase letter
- One special character

Additionally, users cannot reuse any of their last 8 passwords.

Source: https://www.usac.org/service-providers/resources/password-reset-and-requirements/ · page last modified Apr 15, 2025 · captured Nov 1, 2026

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Text Verification Codes

Receive Verification Codes by Text

Adding a telephone number to their account allows USF system and application users to receive verification codes by text. To set up text message capabilities users should:

1. Find their email on the upper right hand side of the screen and click on the arrow to access the “Settings” button
2. Click the Setting button to open their account information
3. On the Settings page, click the green “Edit my Settings” button in the upper right-hand side of the screen
4. Find the box labeled “Extra Verification” and click on the “Set Up” button next to SMS Authentication
5. Enter a mobile phone number and select “Send Code” to authenticate the phone number
6. USAC will send a verification code to the phone number
7. Enter the code into the verification box and click “Verify”
8. If the user entered the code correctly, the user receives a message that the “Phone number successfully verified”
9. Click “Done” to return to the Main Settings page

Users who only have access to a single USF application or system will reach the settings page from their “Manage My Subscriptions” page.

Please note that pop-up blockers must be disabled to edit the Settings page.

Source: https://www.usac.org/service-providers/resources/text-verification-codes/ · page last modified Apr 15, 2025 · captured Nov 1, 2026

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  - Password Reset and Requirements
  - Text Verification Codes
  - **MFA Troubleshooting FAQs**
- Quick Links
- Upcoming Dates

MFA Troubleshooting FAQs

These troubleshooting FAQs are provided to help program participants ensure they receive the second form of user authentication via email. Ensure that you are using a Google Chrome, Firefox, or Microsoft Edge web browser to successfully receive the MFA verification code to access USAC systems.

More information about USAC entitlements is available in the USAC Contributor and Service Provider Company Officer Entitlements Guide.

Username and Password

Q1: How do I log into USAC systems? What is my username?

A1: Ensure that you are logging in directly from the USAC website and provide your Username (email address). Your Username must be the same email address you have previously used to submit a form or create an account with USAC.

- For the E-Rate program, your Username must be associated with an active EPC account.
- For the Rural Health Care program, your Username must be associated with an approved eligibility FCC Form 460 or FCC Form 465.
- For the High Cost program, your Username must be associated with an FCC Form 498 ID/SPIN.
- For Service Providers, your Username must be associated with an FCC Form 498 ID/SPIN or FCC Form 499.

Q2: How do I change my username?

A2: If you need to change your original username (email address) in order to receive the MFA verification code, contact the specific program by using the contact information available on the Contact USAC webpage for further instructions.

Q3: What do I do if my password expired?

A3: A password will expire if you have not logged in for a while and must be updated. If your password expired or if you forgot your password, select **Forgot password?** to receive instructions via email to reset the password.

Q4: How do I change my password?

Select **Forgot password?** to receive instructions via email to reset the password.

Access the System

Q5: What web browsers should I use to receive the MFA code and access USAC systems?

A5: Ensure that you are using Google Chrome, Firefox, or Microsoft Edge web browsers to receive an MFA verification code. It is important to adjust your cookies and cache settings to prevent a “Log in Loop” which would take you back to the login homepage. You will need to clear your cookies and cache and allow third-party cookies in your web browser settings. Do not use Google Chrome incognito mode or private windows.

Q6: I am stuck in a “Log in Loop” which takes me back to the login homepage. How do I prevent or resolve this issue?

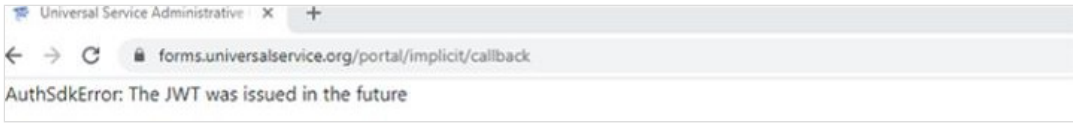
A6: You will need to clear your cookies and cache, and allow third-party cookies, in your web browser settings.

- To clear your cookies and cache, take the following steps:
  - Google Chrome
  - Firefox
  - Microsoft Edge
- To allow third-party cookies, take the following steps:
  - Google Chrome
  - Firefox
  - Microsoft Edge

You may also need to check your browser plug-ins and ad/cookie blockers to manually add “USAC.org” as a listed safe website.

Q7: I am receiving a “AuthSdkError: The JWT was issued in the future” error message when trying to log into the USAC system. How do I resolve this issue?

A7: Ensure that the time on your company or personal computer is accurate. If your computer’s time is slow or fast by 2+ minutes, the error message below will appear, or a delay in receiving the MFA verification code via email will occur until the time is correct.



Q8: I am receiving a “AuthSdkError: Unable to parse a token from the url” error message when trying to log into the USAC system. How do I resolve the issue?



A8: Ensure that you are using a Google Chrome, Firefox, or Microsoft Edge web browser, clear your cache, and allow third party cookies. If you continue having the issue, take the following steps:

- Click on the URL bar at the top of the browser to highlight the entire web address.
- Press and hold the 'CTRL' key on your keyboard. While holding the 'CTRL' key, press the 'F5' key once to perform a hard refresh.
- Release both keys. This action should clear the cache and potentially fix the issue you are experiencing.

Receive the MFA Code

Q8: How do I ensure that I receive the MFA Code to my email address?

A8: Ensure that your company or personal computer's email system is capable of receiving the **6-digit MFA verification code** from USAC within 10 minutes by taking the following steps:

- Your company's IT system administrators may have Data Loss Protection (DLP) tools that scan emails before sending it to the end user. This can result in a delay or block the verification code emails from USAC. Please check with your IT team or add USAC to your safe sender list.
- "White-List" the following USAC email addresses and handles to your safe sender list: noreply@usac.org and noreply@okta.com.
- Check your SPAM folder.
- Clear out your web browser's cookies and cache. Ensure the timeframe shows "All Times". Then close your browser, start a new browser session and retry the MFA process.

Q9: How long does it take to receive the MFA code via email?

It typically takes up to 10 minutes to receive the MFA code via email. Ensure that the time on your computer is accurate. Wait the full 10 minutes to receive the verification code before attempting another request. If you do not receive the MFA code after 10 minutes, try to log in using a different browser and ensure you have followed the steps above to adjust your cookies/cache settings.

Source: https://www.usac.org/service-providers/resources/mfa-troubleshooting-faqs/ · page last modified Dec 20, 2024 · captured Nov 1, 2026

Resources

- Announcements
- Appeals and Audits
- Forms & Instructions
- Glossary of Terms
- Multi-Factor Authentication
  - **Multi-Factor Authentication**
  - MFA Sign-On Instructions
  - Single Sign-On Dashboard
  - Password Reset and Requirements
  - Text Verification Codes
  - MFA Troubleshooting FAQs
- Quick Links
- Upcoming Dates

Multi-Factor Authentication

USAC added multi-factor authentication (MFA) to increase the security of Universal Service Fund (USF) IT applications. MFA helps safeguard access to data and applications, and provides additional security by requiring a second form of user authentication. This complies with both Federal and FCC information security guidelines.

Learn more about the MFA process:

- MFA Sign-On Instructions
- Single Sign-On Dashboard
- Password Reset and Requirements
- Text Verification Codes
- MFA Troubleshooting FAQs

Source: https://www.usac.org/service-providers/resources/multi-factor-authentication/ · page last modified Jun 25, 2024 · captured Nov 1, 2026

E-Rate Productivity Center: Administrative How-To Guide

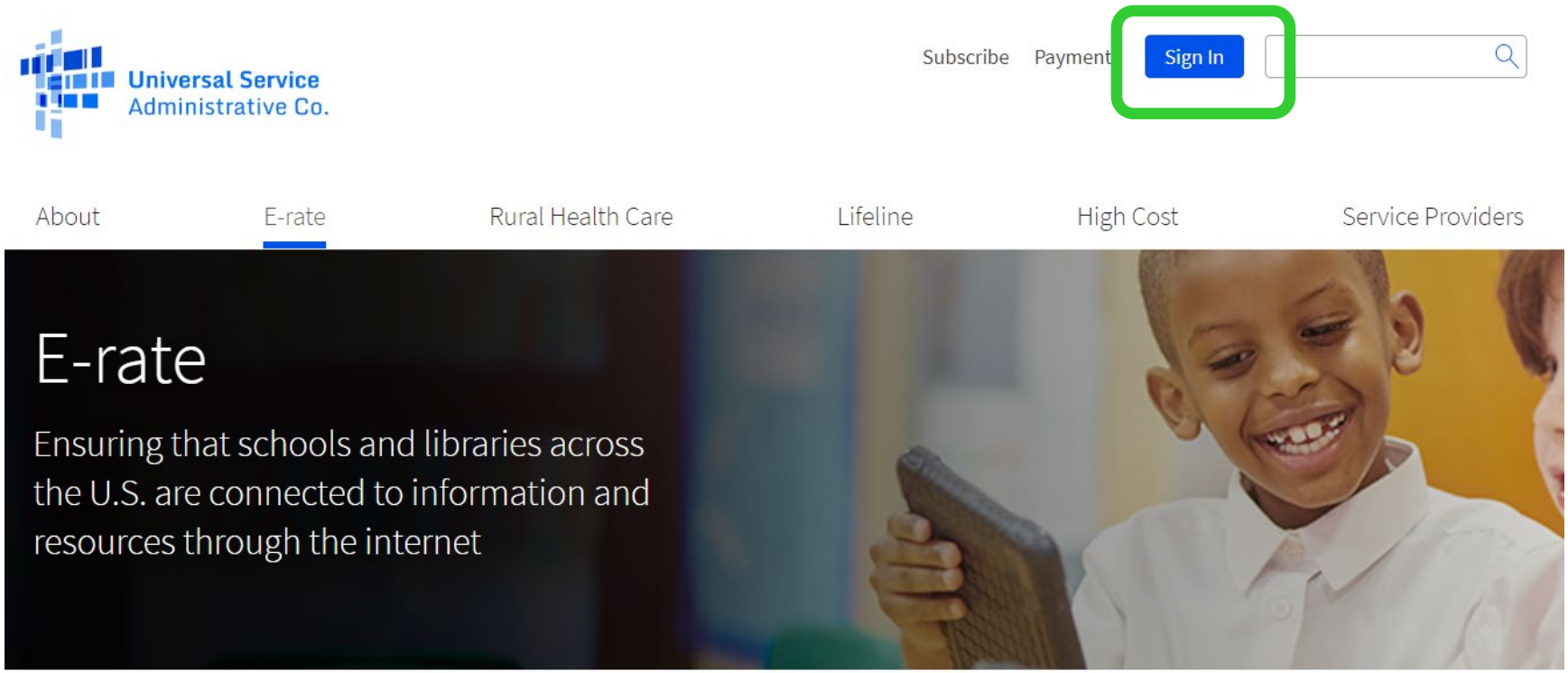


- ✓ How to Log-In to One-Portal/EPC (slide 2)
- ✓ How to Reset your EPC Password (slide 6)
- ✓ How to Change Account Administrators (only AA can do) (slide 9)
- ✓ How to Create New EPC Users (only AA can do) (slide 16)
- ✓ How to Change User Permissions (only AA can do) (slide 24)
- ✓ How to Remove User from Your EPC Account (slide 26)
- ✓ How to Remove Consultant User from Your EPC Account (slide 30)

How to Log into One Portal

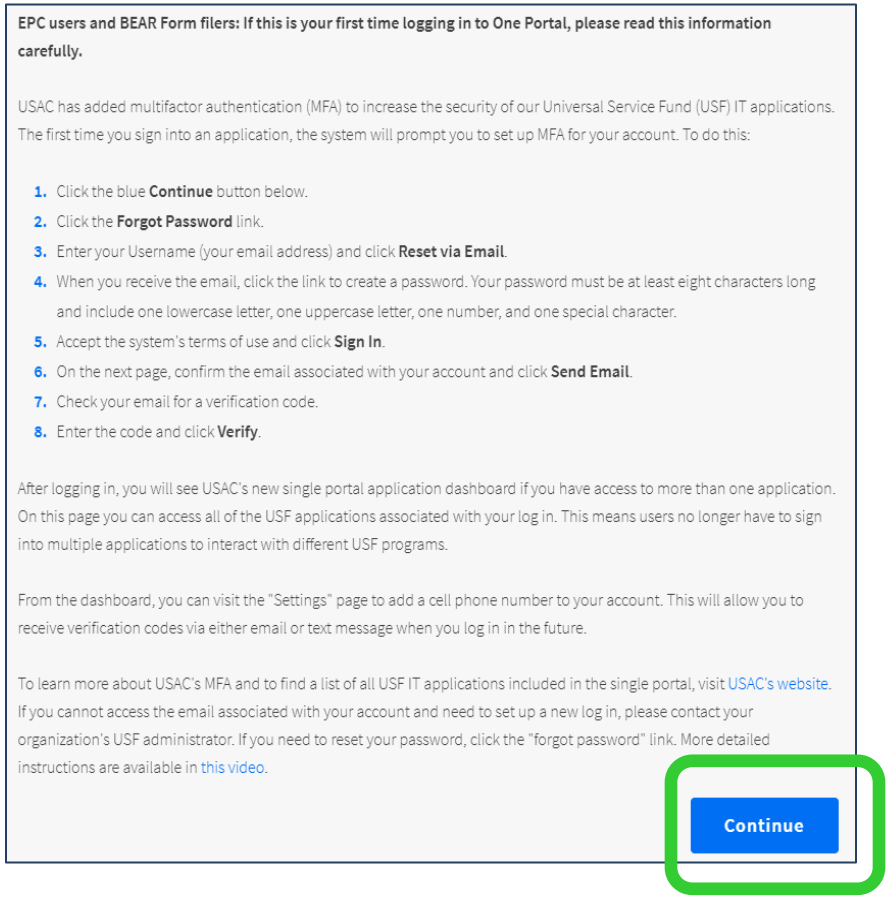
For instructions on how to set up your One Portal Account, see One Portal/MFA Set Up Guide

Logging in to One Portal (1P)



Intro Screen

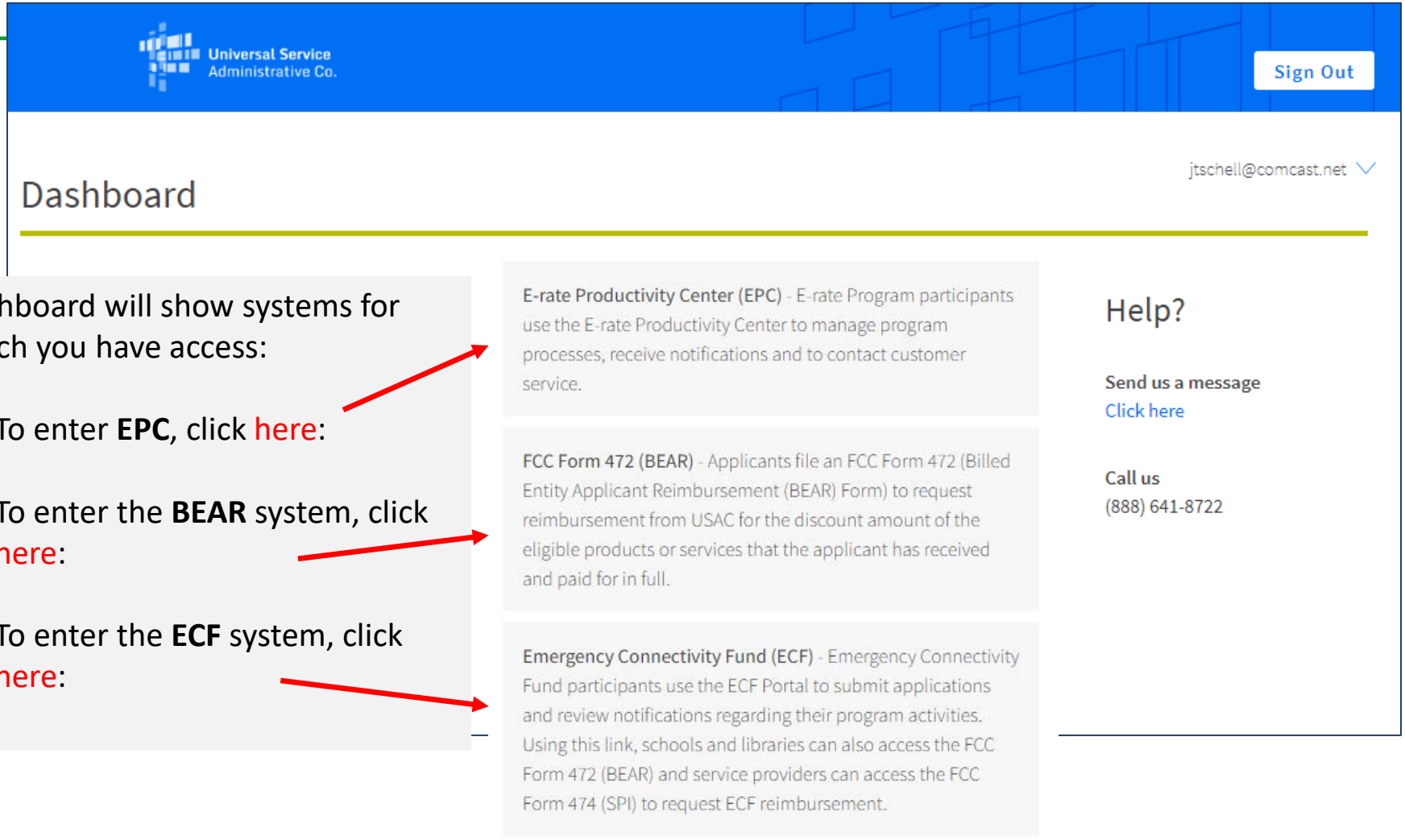
- This screen will appear each time you log in to One Portal.
- Click Continue:



Dashboard: You're In!

Dashboard will show systems for which you have access:

- To enter **EPC**, click here:
- To enter the **BEAR** system, click here:
- To enter the **ECF** system, click here:



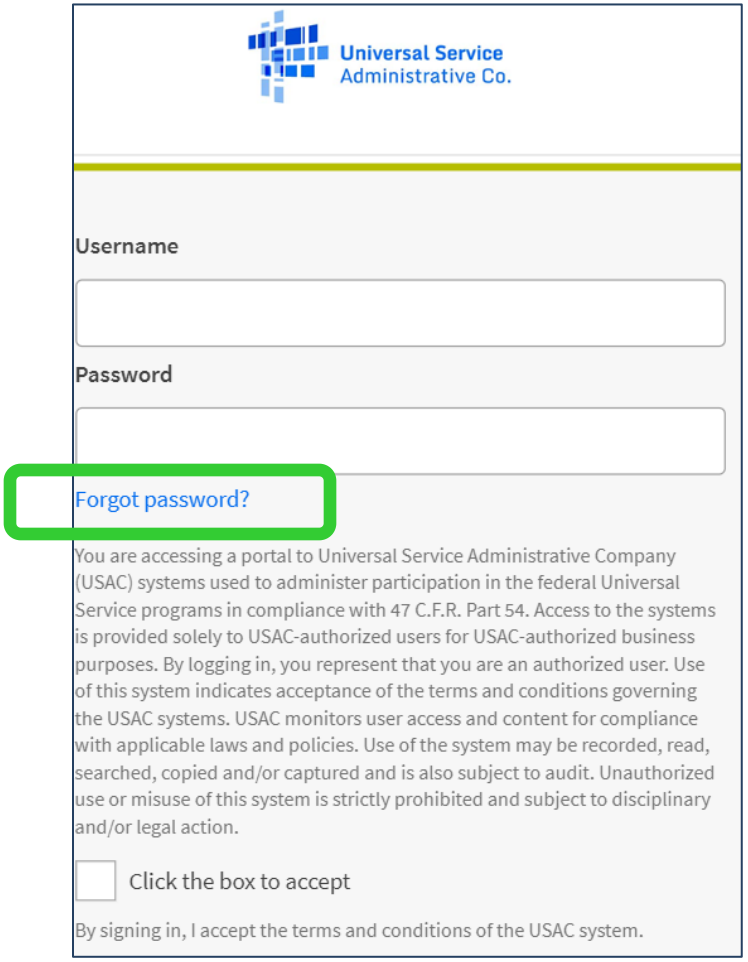
How to Set or Reset One Portal Password

Can’t Remember Your Password?

Passwords are only valid for 60 days.

Click **Forgot Password** – The system will e-mail you a temporary link to reset your password.

If no e-mail is received, it means that you are not yet set up in One Portal and must contact USAC at 888-203-8100 for assistance.



How to Set or Reset EPC Password

- Passwords must meet all of the following criteria:
  - Contains at least 8 characters
  - Has not been used in the previous 4 passwords
  - Contains at least 1 character of the English alphabet
  - Contains at least 1 number (0-9)
  - Contains at least 1 non-alphabetic character (such as !, &, #, %)
  - Contains at least 1 uppercase character (A – Z)
  - Contains at least 1 lowercase character (a - z)

How to Change EPC Account Administrators

Basics:

- The AA must be school or library employee (not consultants)
- There is only one AA per organization
- AAs first must be set up as “Users” in EPC
- Only AAs or USAC can transfer their AA status to another User

Next Steps:

There are specific steps to updating an organization’s AA, depending on the situation. Select the appropriate situation from the next few slides to see the required steps for updating the AA.

How to Change Account Administrators

Situation A

The *previous* AA is still at the school or library (or if you can still ask them to do it even though they no longer work there),

and…

The *new* AA is already a User in EPC

Instructions:

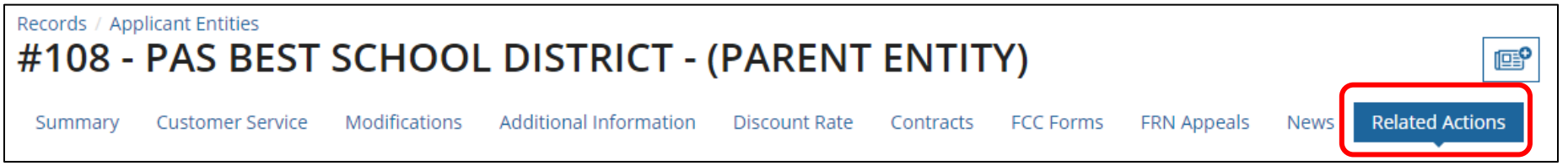
1. The current AA logs into their EPC account
2. Selects > Name of Entity on Landing Page > Related Actions > Modify Account Administrator and selects the User that should be the new AA

Change Account Administrators

Situation A

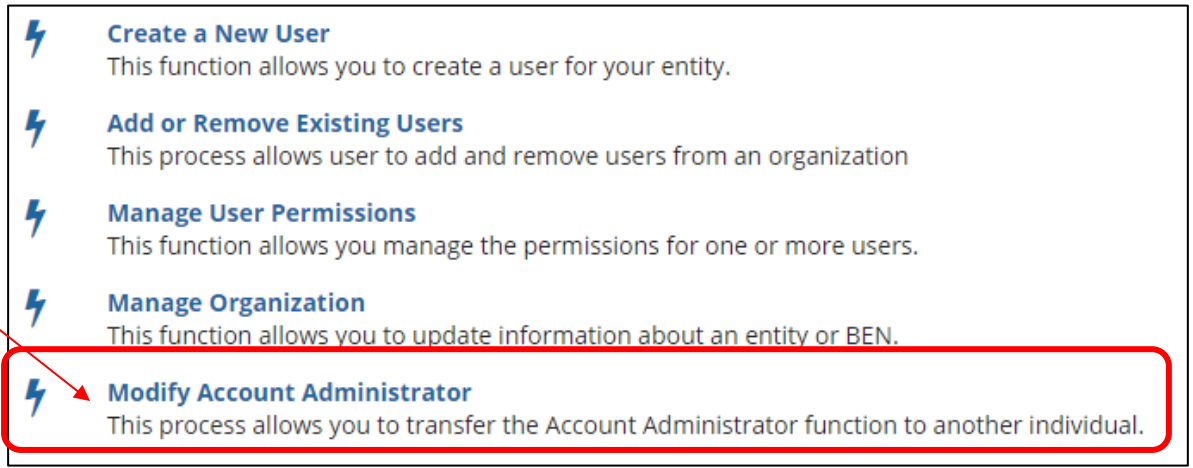
Step 1:
Click on Entity Name





Step 2:
Select Related Actions

Step 3:
Select Modify Account Administrator



Change Account Administrators (2)

Situation B

The previous AA is still at the school or library (or is no longer there but they are willing to access their EPC account to help perform these tasks),

and…

The new AA is not already a User in EPC

Instructions:

1. The current AA logs into their EPC account
2. Selects > Name of Entity on Landing Page > Related Actions > Create New User and enters the new user's information (including giving them Full Rights to all the forms)
3. The EPC system will then send an automated e-mail to the New User asking them to log-in to EPC, establish their password (by clicking "Forgot Password"), and accept their EPC Terms and Conditions in EPC

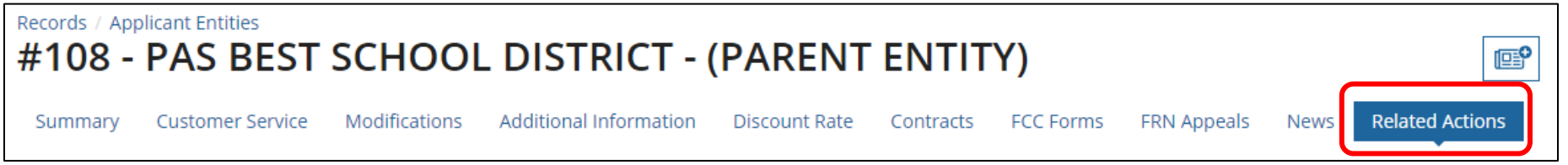
   Note: This is different than the log-in Ts & Cs
4. After the New User has logged into EPC and accepted their Ts & Cs, the New User will appear in EPC as a user for that entity
5. Current AA can then select > Related Actions > Modify Account Administrator and selects the New User that should be the new AA

New Account Administrator

Situation B

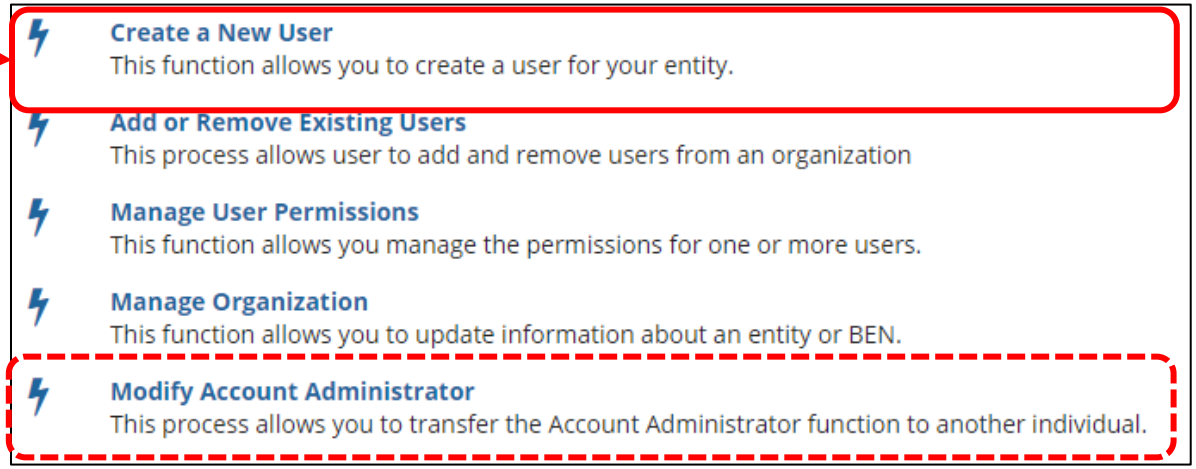
Step 1: Click on Entity Name





Step 2: Select Related Actions

Step 3: Select Create a New User. The new User will receive an e-mail with steps to follow. After User logs in/accepts their Ts/Cs, the AA can select 'Modify AA'



Change Account Administrators (3)

Situation C

The current AA is no longer at the school or library and no one has access to their EPC account

Instructions:

1. New AA must contact USAC's Customer Support Center (CSC) for assistance at 888-203-8100
2. CSC will ask New AA for contact information and will have the New AA send the CSC rep the following information from their school or library's e-mail account:

"I am writing to ask to be set up as the new Account Administrator in our EPC Portal. The previous AA has left the organization."

- Name:
- Title:
- Billed Entity Number (BEN):
- Organization:
- Address:
- Phone:
- E-mail:

More on Changing AA

3. USAC will then establish the New AA as a "User" in the entity's EPC portal
4. The EPC system will send an e-mail with a link to log into their EPC account
   - *The log-in page will require the New AA to set up their EPC password which is done by clicking on the "Forgot Password" link*
5. Please note that the Terms/Conditions that must be accepted in the portal are not the same as accepting the password terms/conditions.
6. After logging in to EPC, the New AA will accept the Terms and Conditions
   - *Note: These T/Cs are different than the password T/Cs*
7. The new AA will contact CSB again to let them know this has been done and ask CSC to designate them as the official Account Administrator

How to Create a New EPC User

Basics:

- Only AAs can create EPC Users for their organization (BEN)
- There can be multiple Users in an organization
- Every User must have a distinct EPC ID (e-mail address)
- If a person is a User in more than one organization (BEN), they must have a different e-mail address for each organization
- Only AAs can assign User Rights

Create a New EPC User

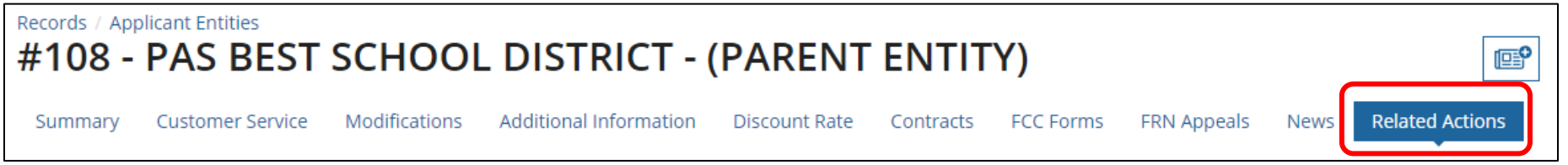
Instructions:

1. The AA logs into their EPC account
2. Selects > Name of Entity on Landing Page > Related Actions > Create New User and enters the new user's information (including giving them Full Rights to all the forms)
3. The EPC system will then send an automated e-mail to the New User asking them to log-in to EPC, establish their password (by clicking "Forgot Password"), and accept their EPC Terms and Conditions in EPC
   - Note: This is different than the log-in Ts & Cs
4. After the New User clicks on the link in the e-mail, they only have 15 minutes to set up their One Portal account.
5. After the New User has logged into One Portal, is in EPC and accepted their Ts & Cs, the New User will appear in EPC as a user for that entity

Selecting Create a New User

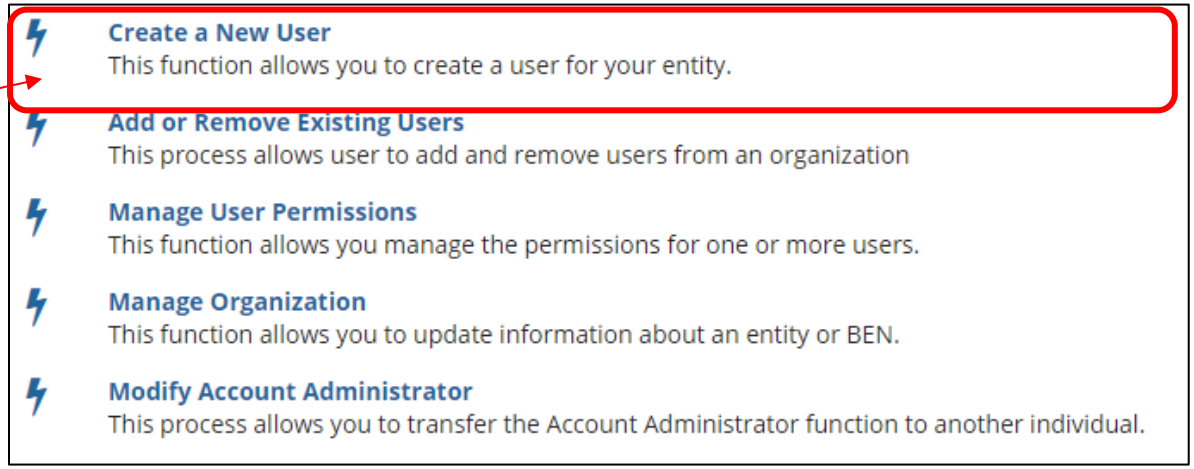
Step 1: Click on Entity Name





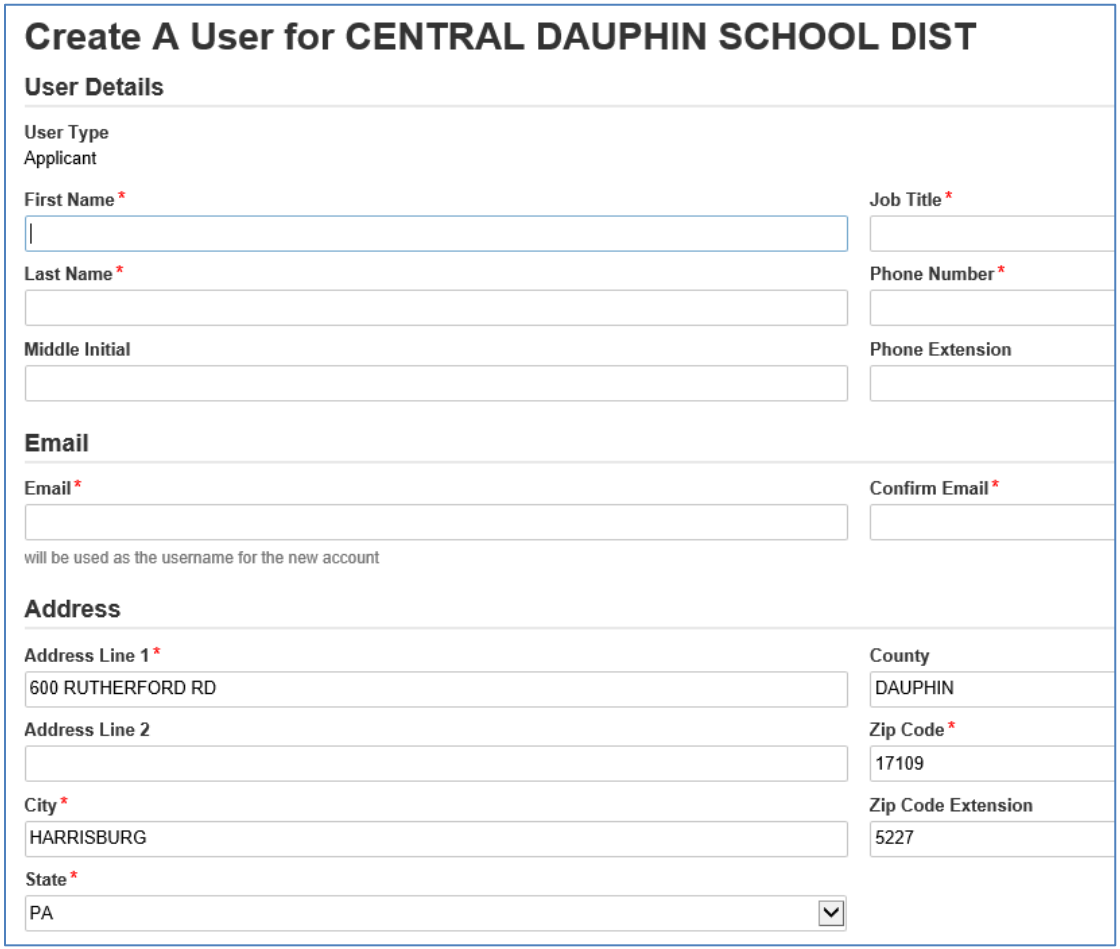
Step 2: Select Related Actions

Step 3: Select Create a New User.



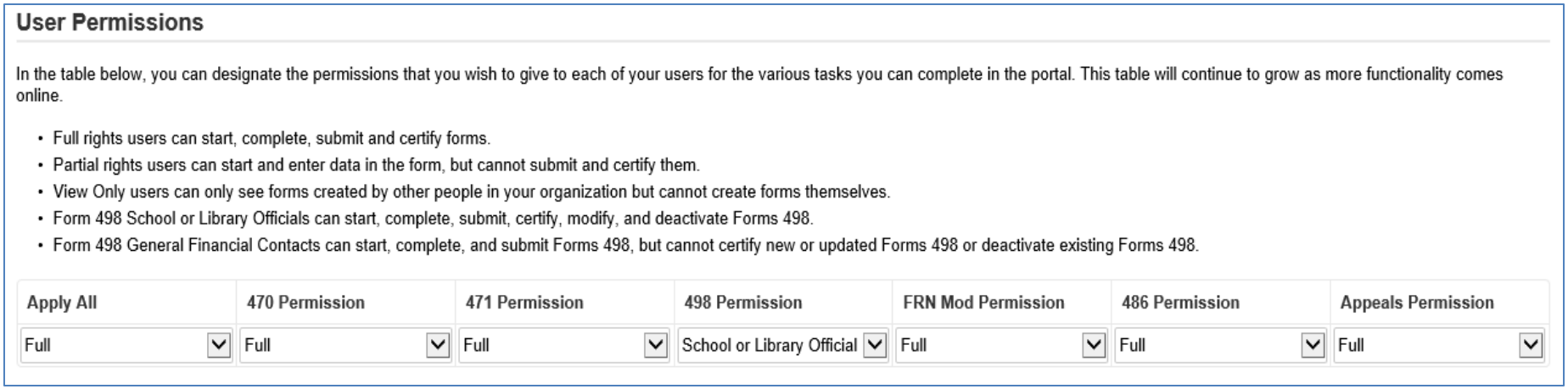
Create a New EPC User (2)

- AA will complete the information form for the New User



New EPC User

- AA will assign the New User their EPC Permissions
  - Full: can enter data and submit forms – use this one
  - Partial: can enter data, but can't submit forms
  - View only: can only look at forms



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.

Apply All	470 Permission	471 Permission	498 Permission	FRN Mod Permission	486 Permission	Appeals Permission
Full	Full	Full	School or Library Official	Full	Full	Full

How to Create New EPC User

Newly created user will receive an e-mail from USAC that looks like this:

From: portal@usac.org <portal@usac.org> **On Behalf Of** EPC Application Administrator
Sent: Tuesday, September 4, 2018 3:03 PM
To: XXXXXXXXX
Subject: USAC EPC - Account Creation

Universal Service Administrative Co.

They must click on this link, create their EPC password, then log into EPC and accept their Terms and Conditions

Hello,

Your USAC E-rate Productivity Center (EPC) account has been created with the username: XXXXXXXXX. To log in with your new username, navigate to https://portal.usac.org/suite/tempo, and then select the Forgot Password option and follow the directions. You will also receive a separate email shortly from USAC called, "New Task: Complete Terms and Conditions." This email is a reminder that you must first accept USAC's Terms and Conditions before you can get access to the features within EPC.

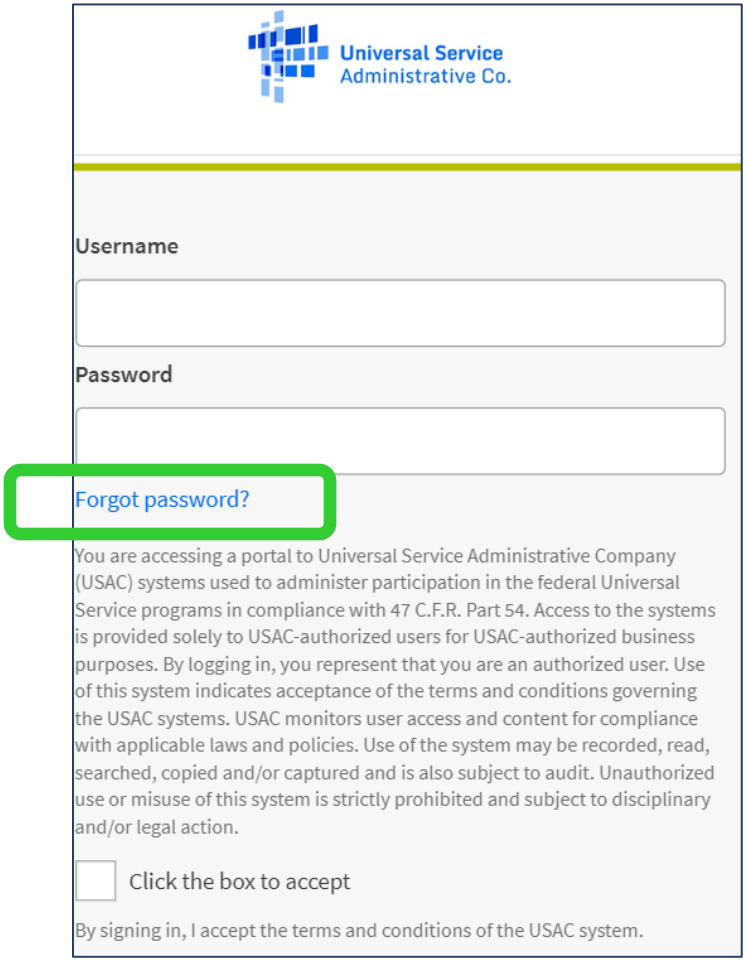
If you have any questions about your account, please contact USAC's Client Service Bureau at (888) 203-8100.
Thank you,

Universal Service Administrative Co.

Establishing New User's Password

Don't enter Username or Password.

Click **Forgot Password** – The system will e-mail you a temporary link to reset your password.



Create a New EPC User (3)

- After creating their password, new EPC users will log into EPC, and then must accept the Terms and Conditions which is found under Tasks:



Step 1: Click 'Tasks' on the top toolbar



Step 2: Click "Complete Terms and Conditions"

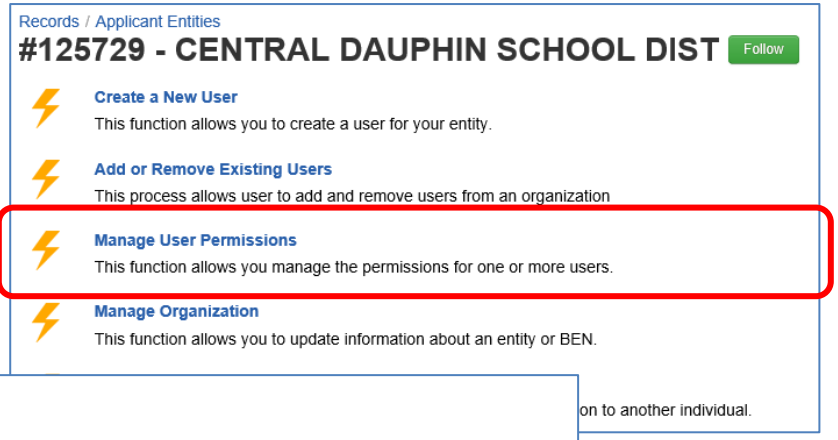


Step 3: Scroll to the bottom of the Agreement and click "Agree"

How to Change Users' Permissions

Change Users' Permissions

- Only the AA can perform this task



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- 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.

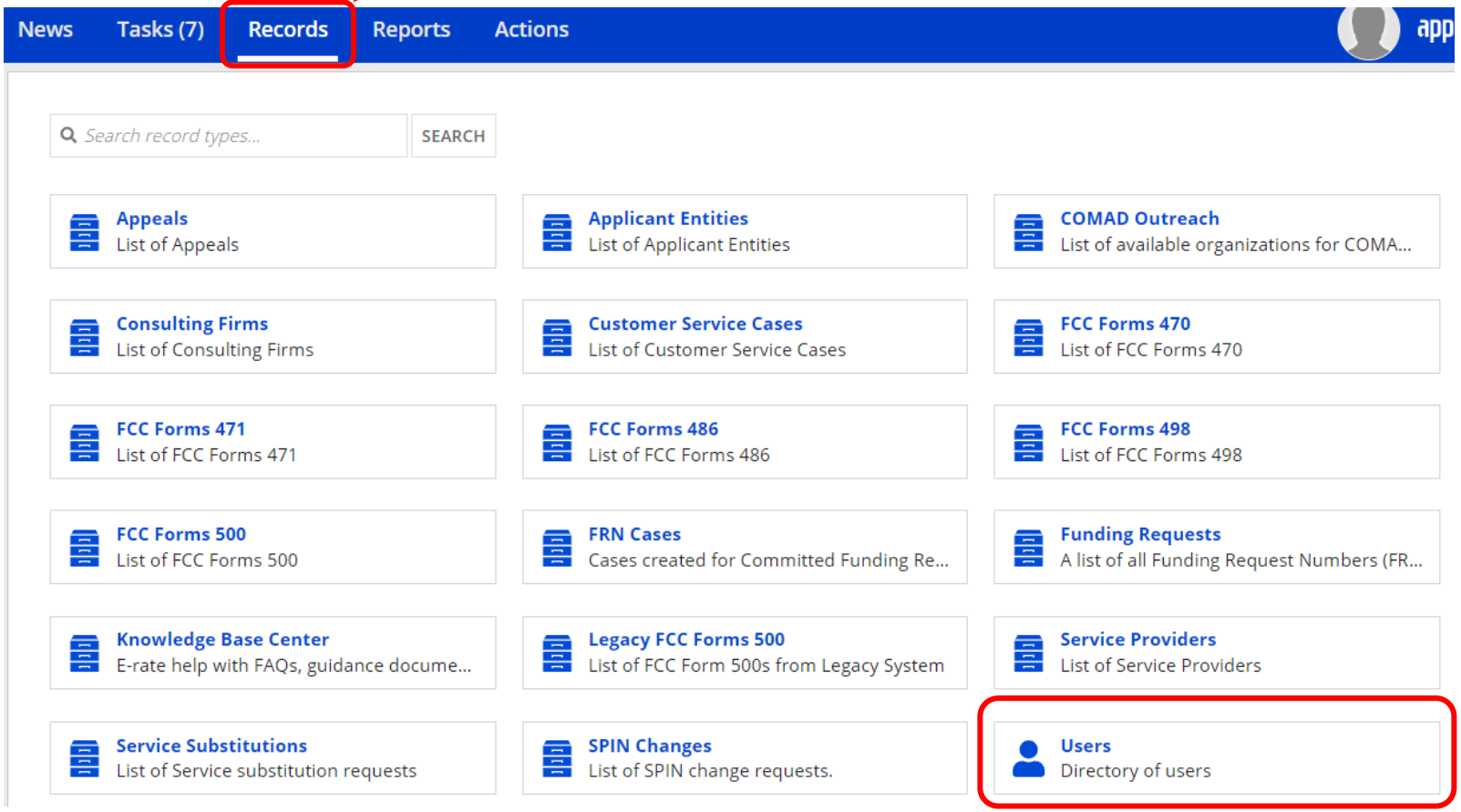
Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
School District 4 User 1	school.district4.user1@mailinator.com		Full	Full	Full	School or Library Official	Full	Full	Full

CANCEL SUBMIT

How to Remove a User from Entity's EPC Account

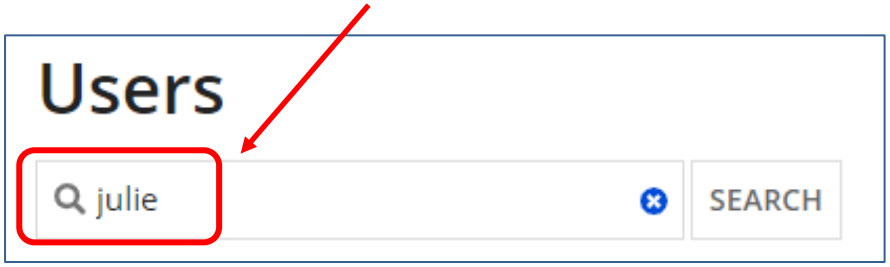
How to Remove User from EPC Account

- Only the AA can perform this task
- Select "Records" from toolbar at top of EPC Landing Page. Then "Users"



Remove User from EPC Account

- Type in first or last name of EPC User, then Search

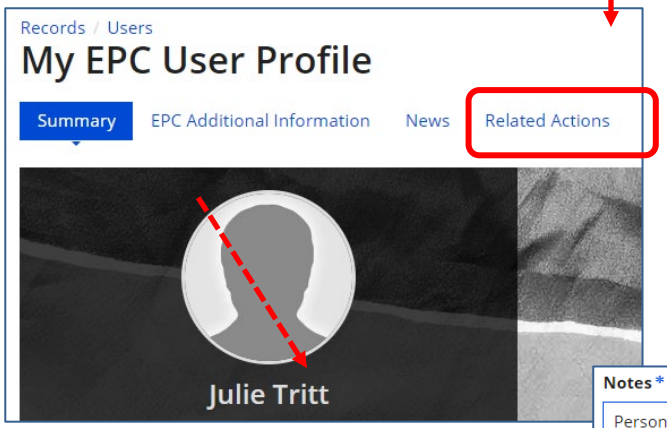


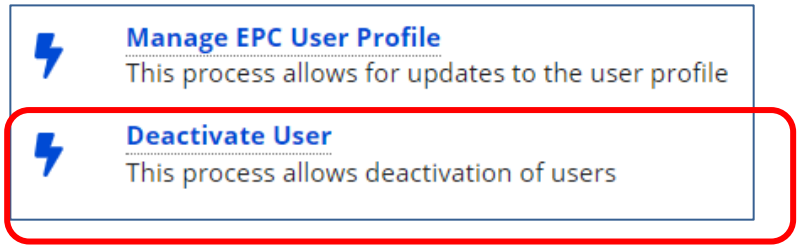
- Then click on the User's Name that you wish to remove

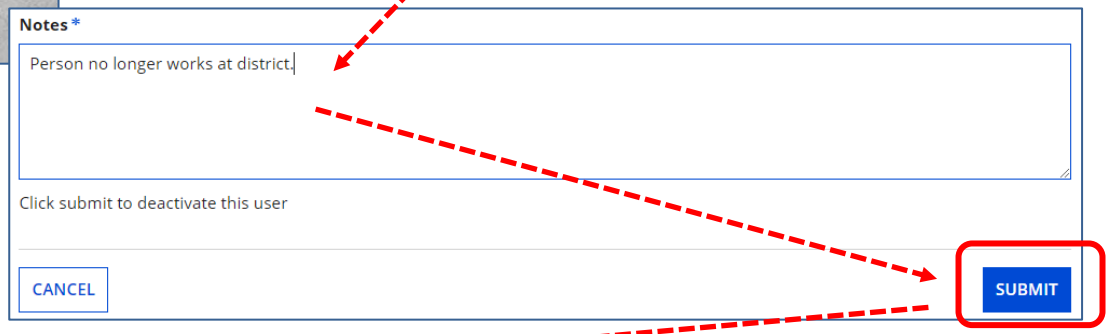


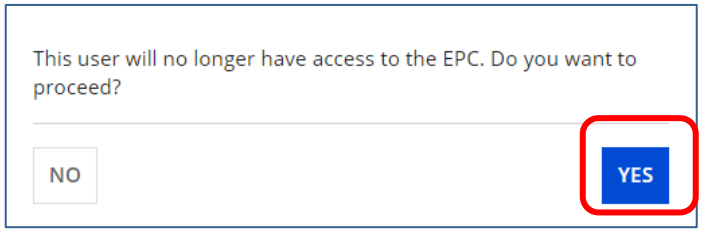
Removing User from EPC Account

- Next, you will see the User's Profile screen. Select "Related Actions", then "Deactivate User"
- Then enter a sentence that explains why that they should be removed, and click Submit





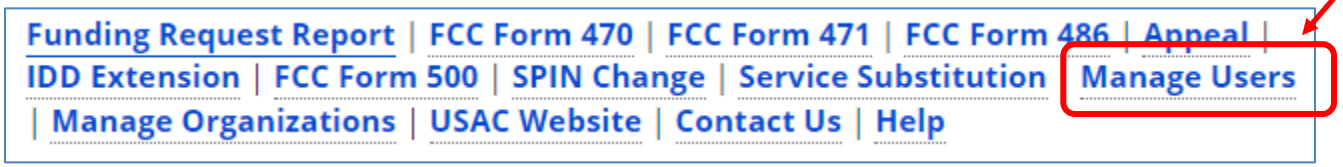


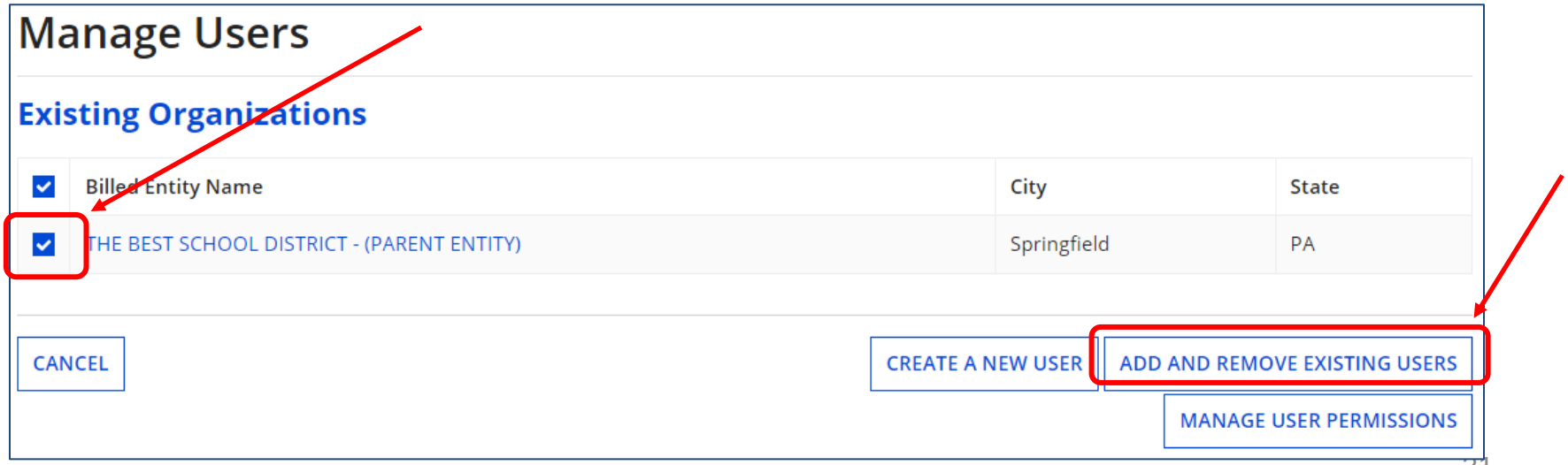


How to Remove a Consultant User from Your EPC Account

How to Remove Consultant User

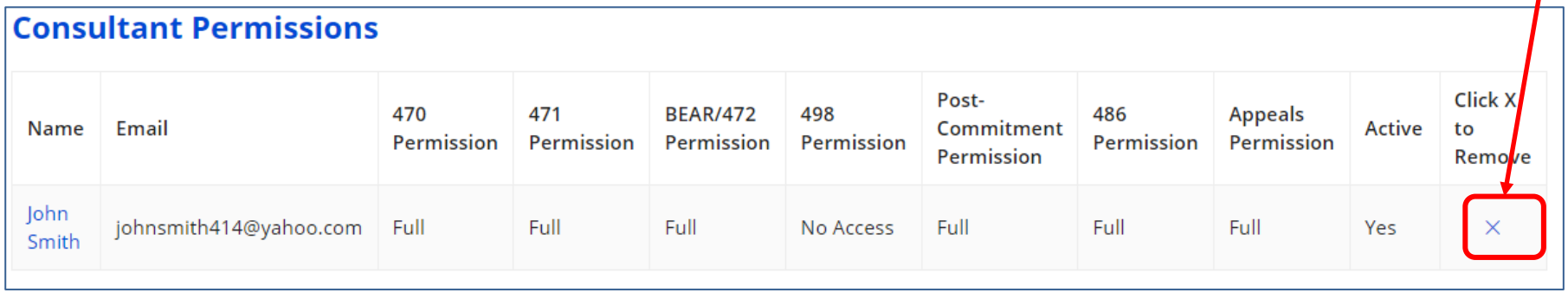
- Only the AA can perform this task
- Select "Manage Users" from EPC Landing Page (shortcuts), select name of the organization, then "Add and Remove Existing Users"





Remove Consultant User

- Click X in last column to remove Consultant User



Consultant Permissions

Name	Email	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission	Active	Click X to Remove
John Smith	johnsmith414@yahoo.com	Full	Full	Full	No Access	Full	Full	Full	Yes	X

Questions?

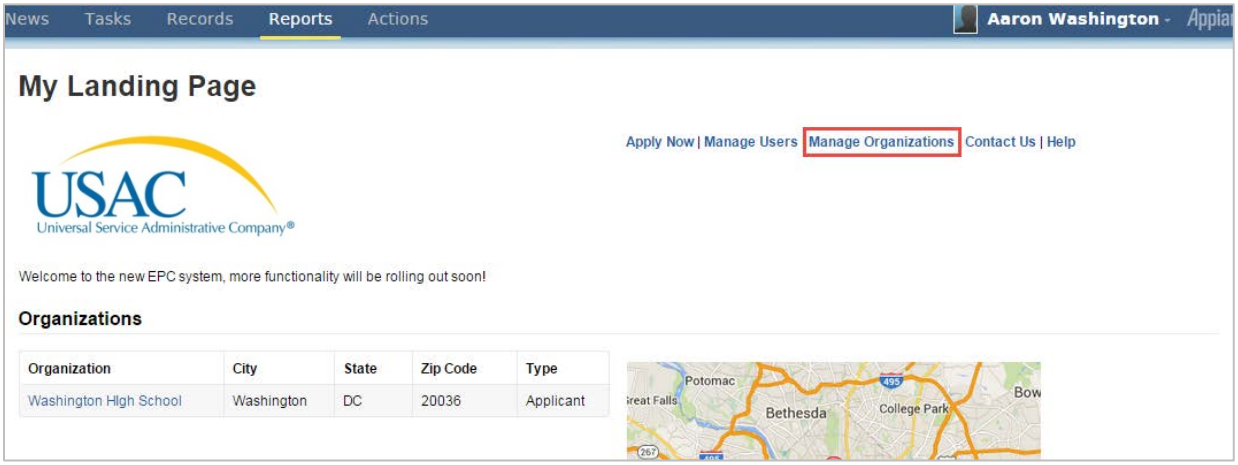
Contact USAC's Customer Service Center (CSC) at 888-203-8100 for assistance



E-RATE PRODUCTIVITY CENTER (EPC) APPLICANT USER GUIDE

Managing Your Organization

1. From your landing page, select the link to **Manage Organizations**.



2. Select your organization from the list.
3. Click **Manage Organization**.



4. The organization details will open.
5. Make any necessary changes to the organization details.
6. Select **Submit**.

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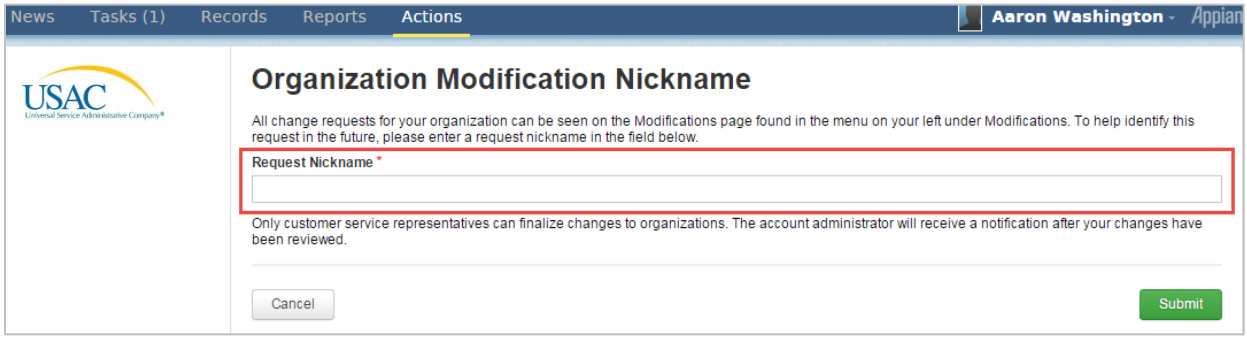
7. Enter a nickname for the modification request. You can use this nickname to track your modification requests in EPC.



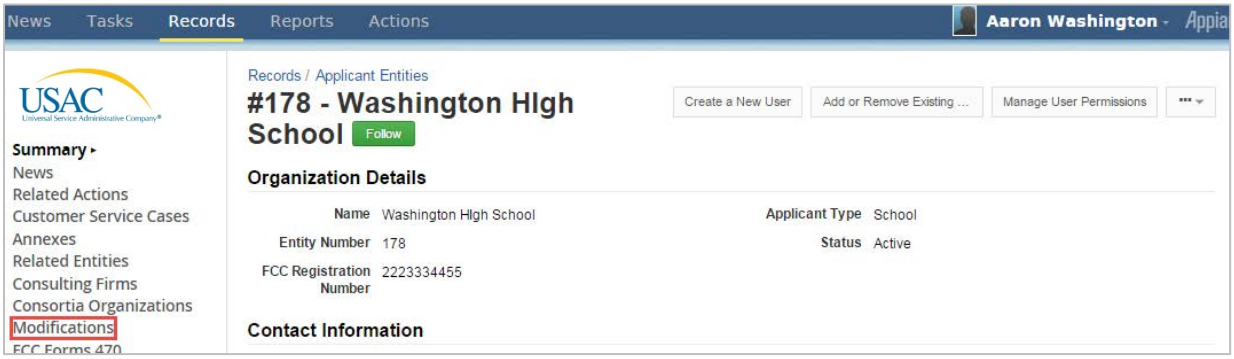
8. **Submit** your modification request.

NOTE: Organization modifications must be approved by the Client Service Bureau. If you are the account administrator, you will receive an email when the changes are approved.

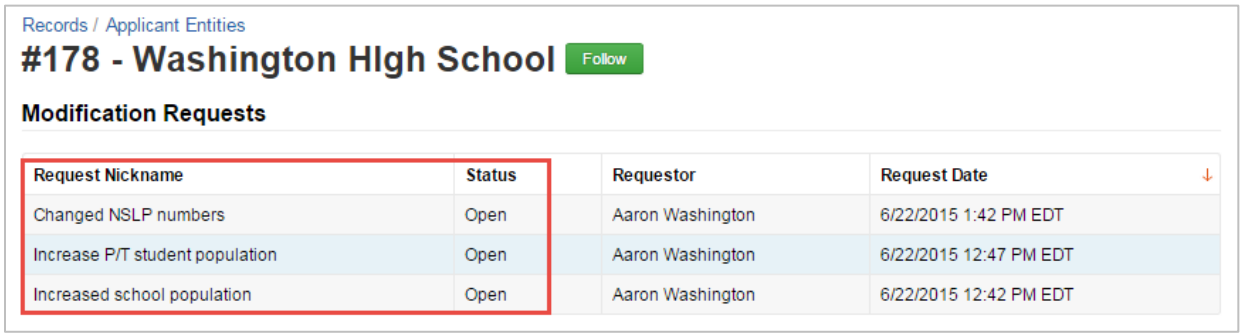
View Organization Modification Status

After you modify your organization, the modification requests are sent to the Client Service Bureau. To view the status of your requests:

1. On your landing page, select the link to your organization.
2. In the left-hand menu, select **Modifications**.



3. A list of your modifications and their status will open.



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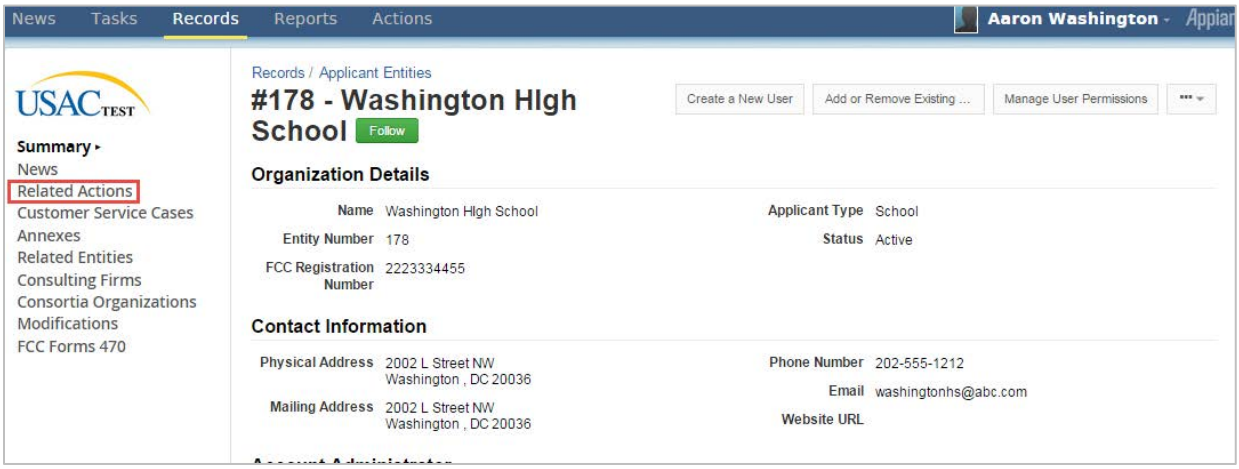
Modify Account Administrator

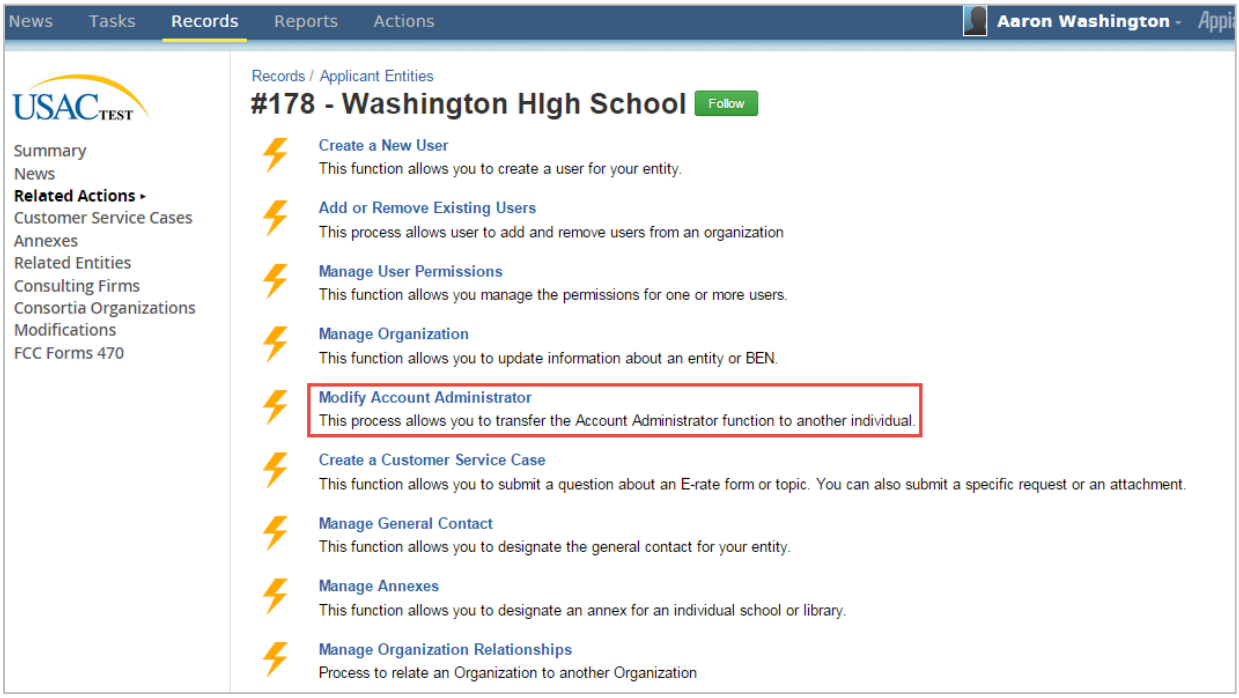
The account administrator can manage the organization account and its users; however he or she will not have permission to file forms by default. To assign the account administrator rights to create and certify FCC forms, see the "Manage User Permissions" section in the EPC "Managing Users" guide for applicants.

To transfer the account administrator function from one individual to another, follow these instructions:

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.



3. Select **Modify Account Administrator**.



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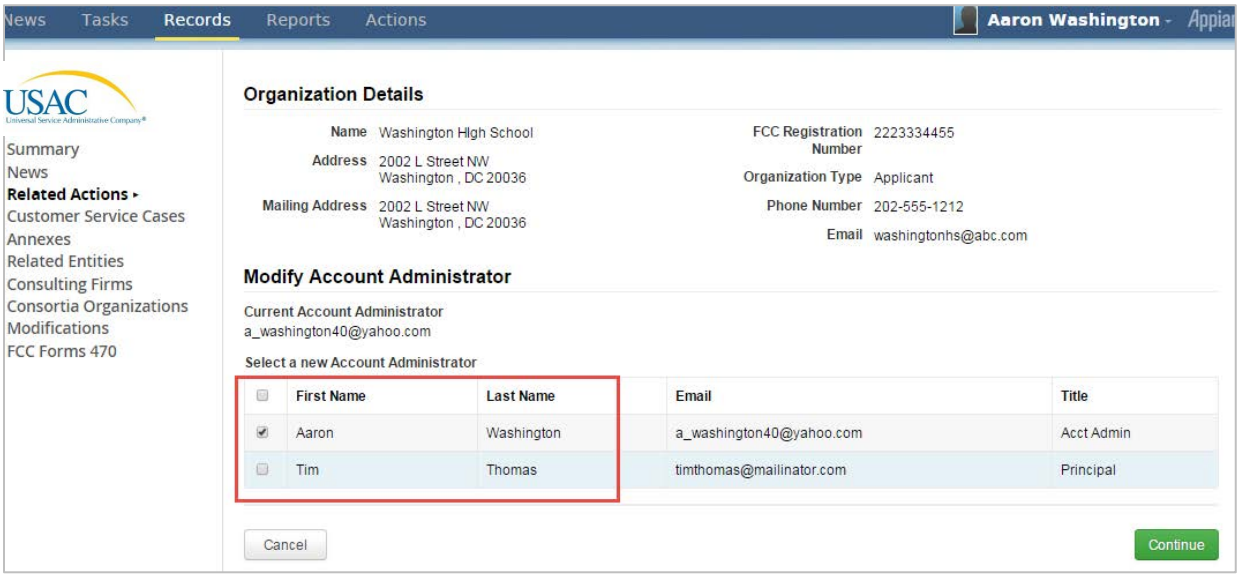
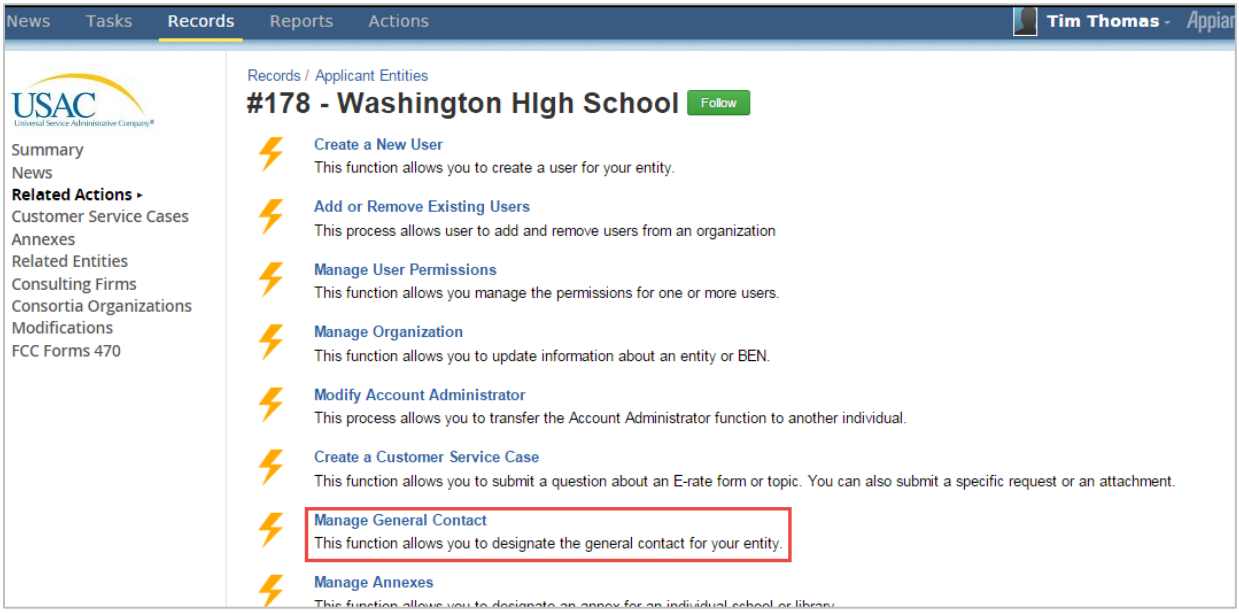
4. The **Organization Details** page opens and displays users. To change the account administrator, uncheck the box for the current administrator if necessary, then select the new administrator from the list.



5. Select **Continue**.
6. Confirm the new account administrator information on the next page, then select **Submit.**

Manage General Contact

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.
3. Select **Manage General Contact**.



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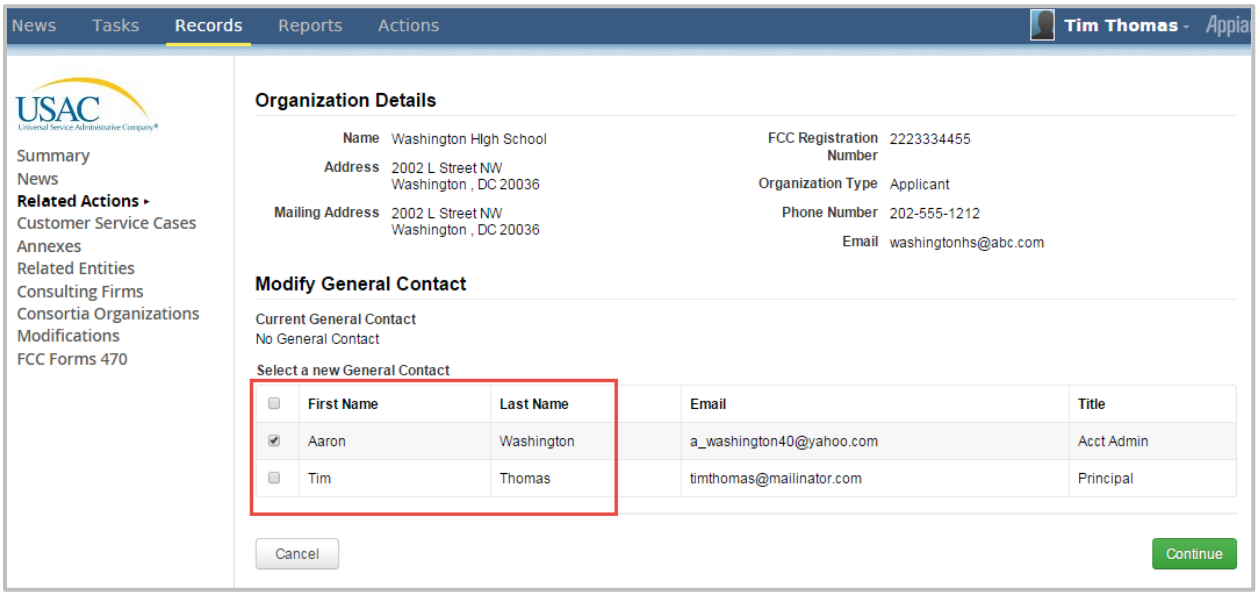
4. The organization details open displaying the associated users.
5. To add a new General Contact, first de-select the current General Contact if necessary, then select the new General Contact from the list.



6. Click **Continue.**
7. Confirm the new General Contact information on the next page, then select **Submit.**

View Annex

An annex is a facility associated with an entity that will have the same BEN but a different physical address.

You can view your current annexes, if any, by selecting **Annexes** on the left-hand menu.



Manage Annexes

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.

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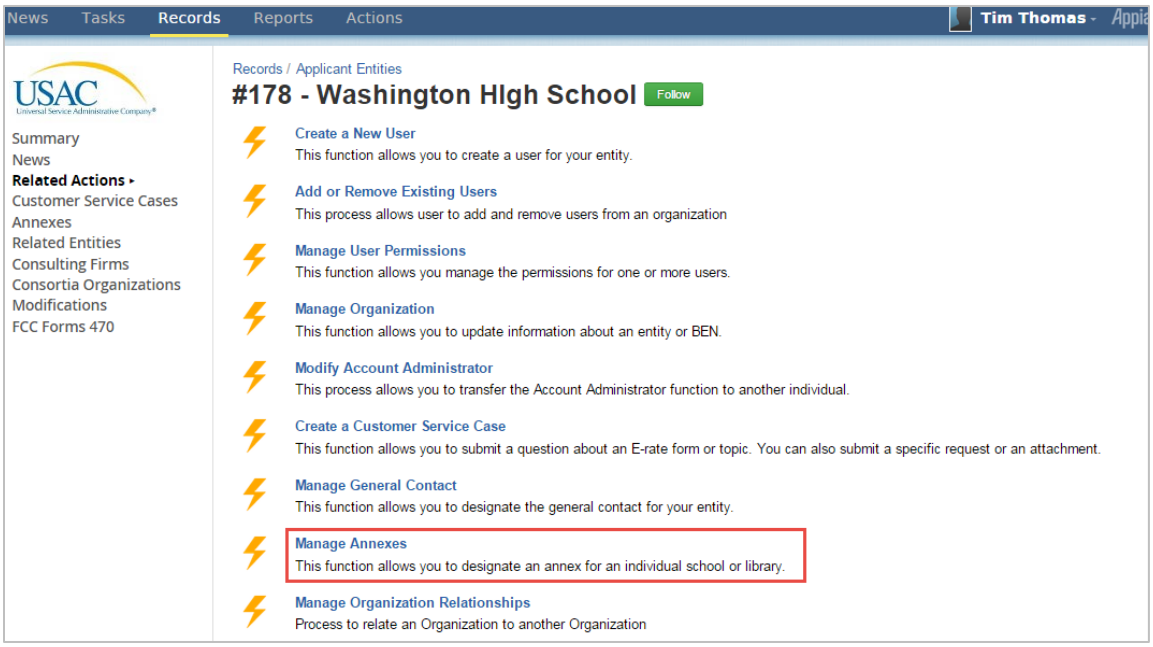
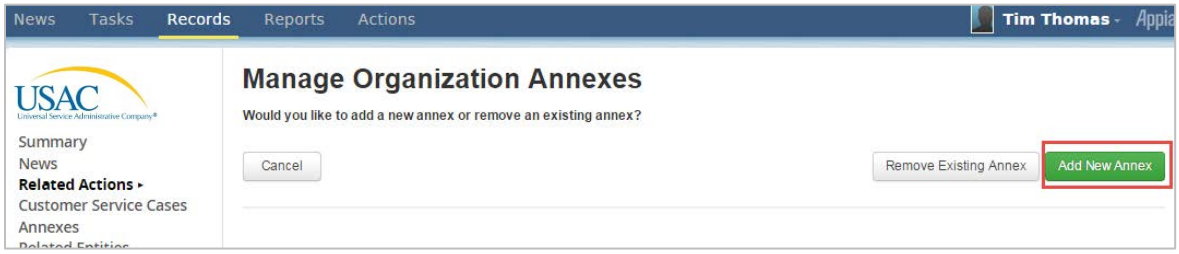
3. Select **Manage Annexes**.



To Add a New Annex

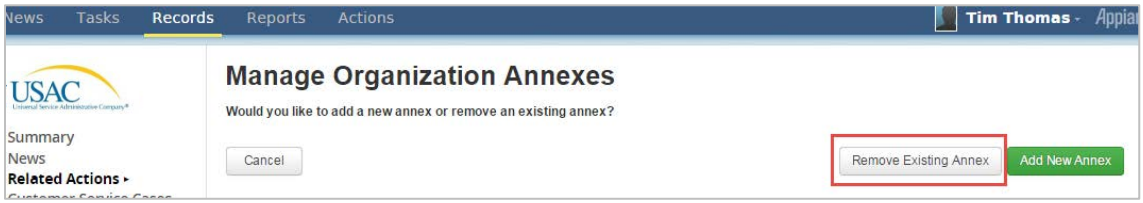
1. On the **Manage Organization Annexes** page, select **Add New Annex**.



2. Enter the name, address, and contact information for the annex.
3. Click **Add New Annex**.
4. Confirm by clicking **Yes** in the pop-up window.

To Remove an Existing Annex

1. On the Manage Organization Annexes page, select **Add New Annex**.
2. Select **Remove Existing Annex**.



3. Check the checkbox for the annex to be removed.
4. Click **Remove Annex**.
5. Confirm by clicking **Yes** in the pop-up window.

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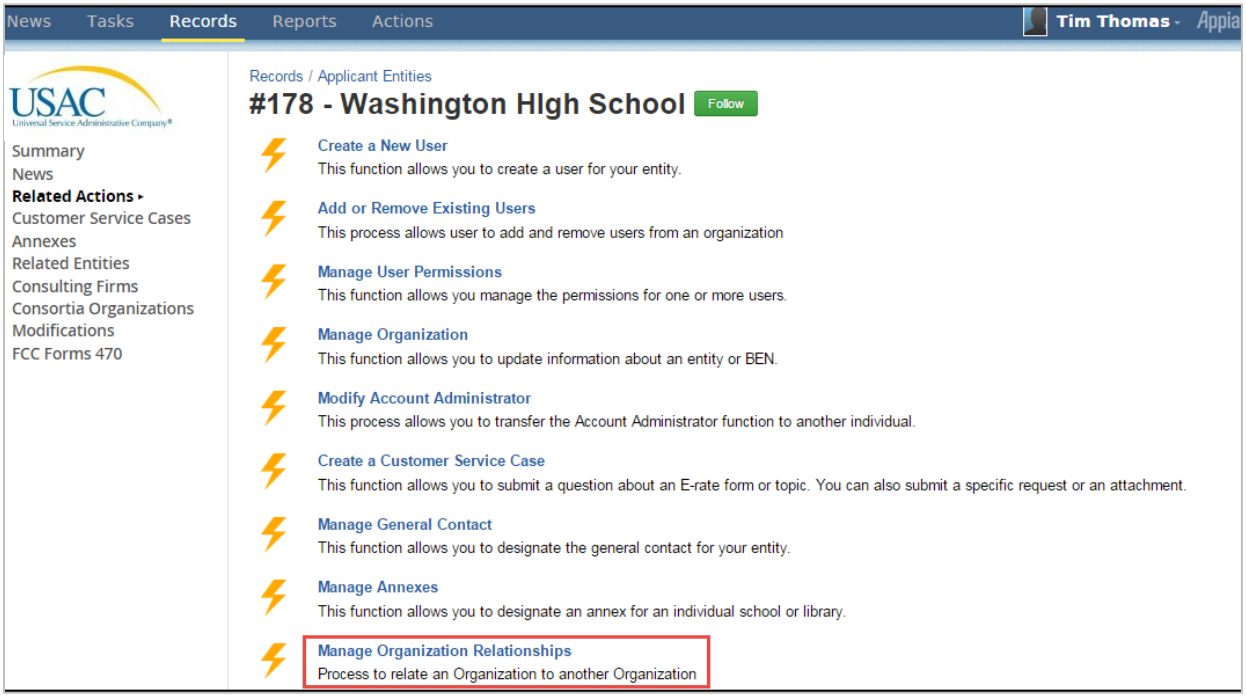
Manage Organization Relationships

Any organization modifications must be approved by the Client Service Bureau. If you need to add a non-instructional facility (NIF), please contact the Client Service Bureau (888-203-8100).

Sign up for a Consortium

Applicant entities such as schools and libraries can sign up for a consortium.

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.
3. Select **Manage Organization Relationships**.



4. On the **Manage Organization Relationships** page, select **Sign up for a Consortium**.



5. On the **Sign up for a Consortium** page, enter search information for the entity (for example, BEN, name, state, or zip code).
6. Click **Search**.
7. Select the consortium by checking the checkbox from the **Add Relationships** list.

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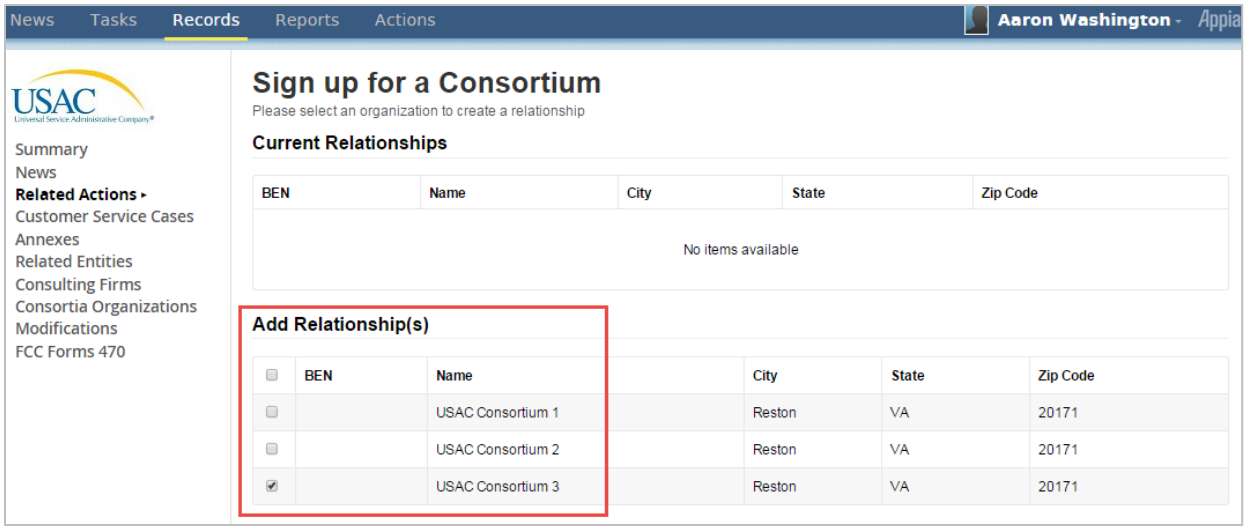


8. Select **Submit.**
6. Confirm by clicking **Yes** in the pop-up window. The account administrator for the consortium will receive an email indicating the organization modification.

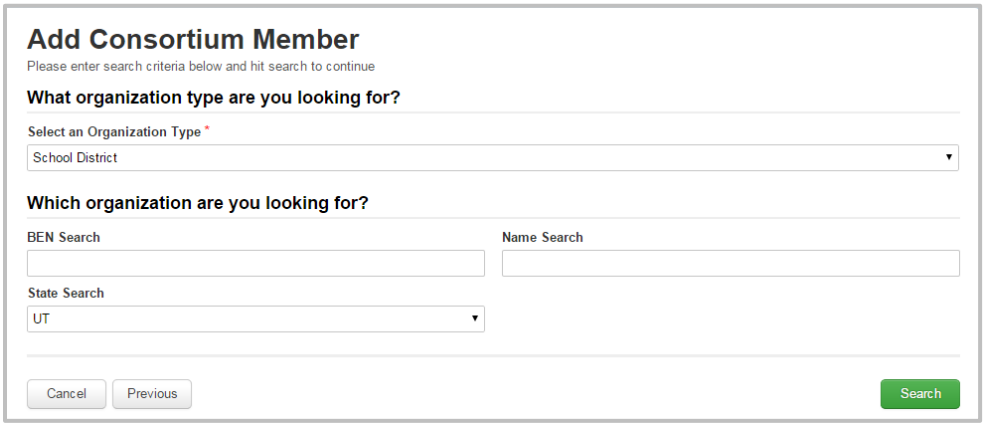
Add a Consortium Member

If you are the account administrator for a consortium, you can add members

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.
3. Select **Manage Organization Relationships**.
4. Select **Add Consortium Member**.



5. Select the organization type from the drop-down menu (library, library system, school district, or school).
6. Enter as much information in the search fields as possible, for example, BEN, name, and state.



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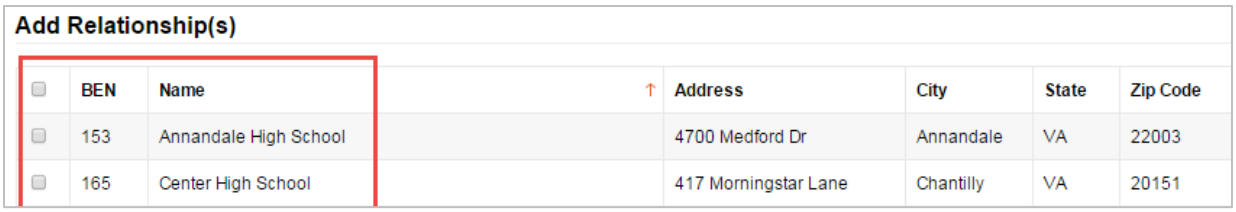
7. Select the member(s) by checking the checkbox from the **Add Relationships** list.

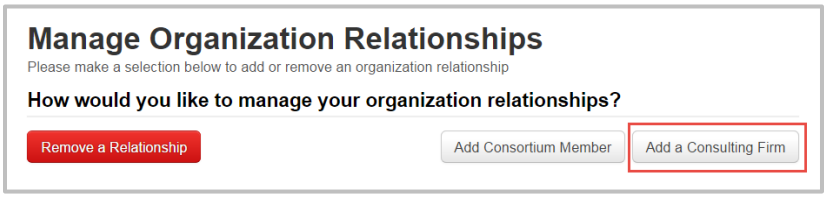


8. Click **Submit**.
9. Confirm by clicking **Yes** in the pop-up window. The account administrator for the new member organization will receive an email indicating the organization modification.

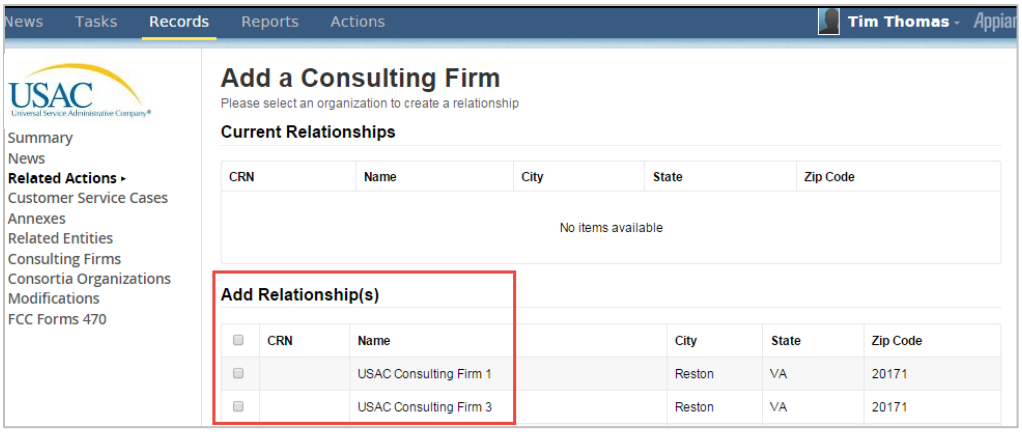
NOTE: Individual members have the option to delete the relationship to the consortium if they do not wish to belong to it.

Add a Consulting Firm

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.
3. Select **Manage Organization Relationships**.
4. Select **Add Consulting Firm**.



5. On the **Add a Consulting Firm** page, enter search information for the consulting firm, for example, consultant registration number (CRN), name, state, or zip code.
6. Click **Search**.
7. Select the consulting firm from the **Add Relationships** list.



8. Select **Submit.**

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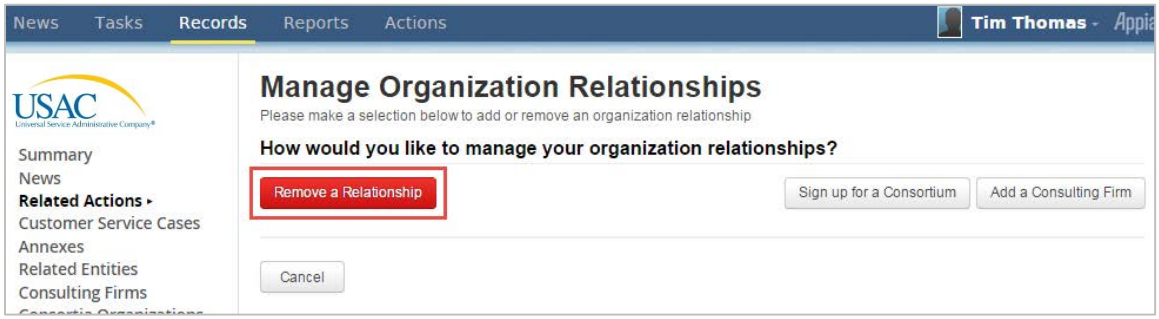
9. Confirm by clicking **Yes** on the pop-up window. The account administrator for the new consulting firm will receive a notification in their news feed with the new organization relationship.

Remove a Relationship

1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.
3. Select **Manage Organization Relationships**.
4. Click **Remove a Relationship**.



5. Check the checkbox next to the organization name to remove the relationship.
6. Select **Submit.**
7. Confirm by clicking **Yes** in the pop-up window.

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