



E-rate Productivity Center (EPC)

Tips & Tricks

portal.usac.org - (888) 203-8100

- **USE** Google Chrome for best results
- **Login** is your email address
- **Passwords** change every 60 days – record yours on your calendar
- **Click the USAC logo**  To go directly to your landing page,
- **Can't update a record, file or certify a program form?** Be sure you have **accepted your Terms and Conditions** Then check with your account administrator to verify your level of rights.
- **Want to create, edit, or delete information?** look for the word **"MANAGE"** in your links or buttons. For example, "Manage Organization Relationships" allows you to associate your organization with a consultant, join a consortium, or remove one of those relationships.
- **Want to sort information in any table?** **Click the column heading** for the column you want to sort. You will be able to see a red arrow to the right of the column heading that indicates if you sorted in ascending or descending order.
- **Need Help? Select RECORDS** for FAQ's, Guidance, Videos and Filing Guides Modify Account Administrator
- **While filing a form,** Click the Link to **"Help" or "Contact Us"**
- **Field assistance?** Click the Blue Circle to the right of the field 
- **An organization account administrator can:**

Create a New User
Remove Existing Users

Manage Organization/Relationships
Modify Account Administrator

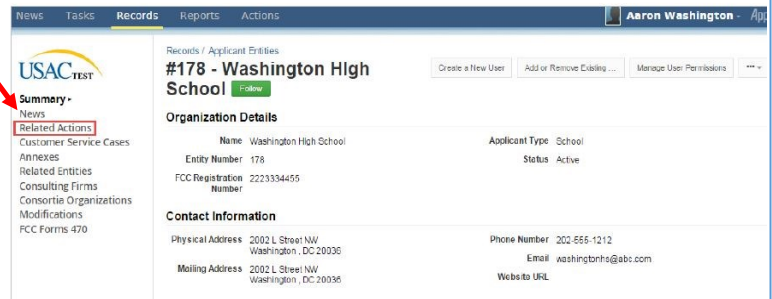
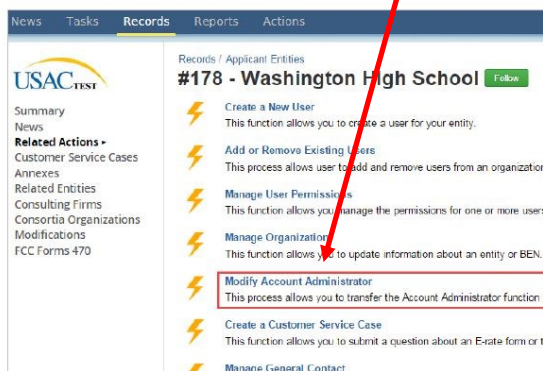
Create Customer Service Cases
Manage Annexes

Manage User Permissions

Manage General Contact

Modify Account Administrator:

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**.



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**.— Confirm the new account administrator information on the next page, then select **Submit**.

Modify General Contact—You must have a General Contact assigned to file a Form 498

1. Follow instructions above on how to Modify Account Administrator, but select "Manage General Contact"
2. The organization details open, displaying the associate users.
3. To add a new **General Contact**, first de-select the current General Contact if necessary, then select the new General Contact from the list.
4. Click Continue— **Confirm** the new General Contact information on the next page, then select **Submit**.

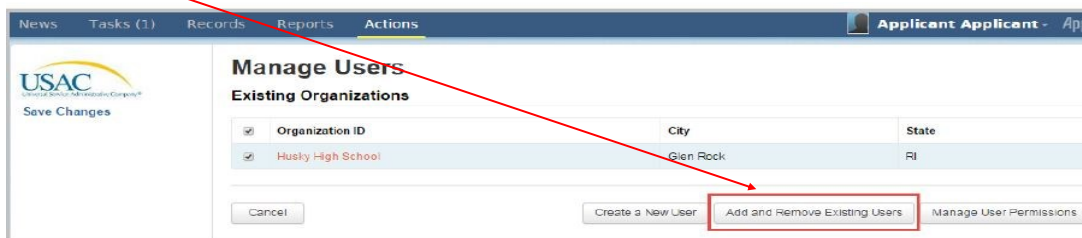
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Add/Modify KSLLC Account Manager—

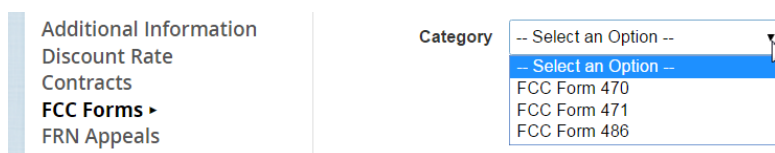
1. On your **Landing Page**, select your main district or library name under **Organizations**.
2. On the left-hand menu, **select On My Landing Page**, **click** on your main district or library name under Organizations.
3. Click **Add or Remove Existing Users**



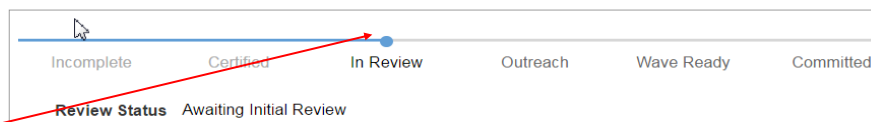
4. Type in the **name or email** of your KSLLC Account Manager and **search**
5. **Check** the box next to the name and **submit**
6. **Go back to main** district/library page and **Manage User Permissions**
7. **Assign** your account manager **Full Rights/Apply All—SUBMIT**

TRACK YOUR APPLICATION STATUS:

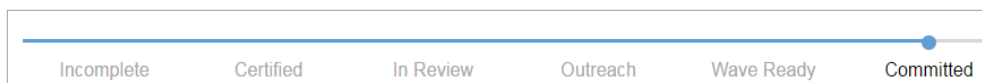
- **Go to your Landing Page** On the left hand Menu, **Click “FCC Forms”** in the activity column, and select **“FCC Form 471”** in the pull-down Category list.
- **Select Funding Year 2016**. This will generate a list of the applications begun and/or completed for you.



- **To check the status of any one Form 471**, click on the application number. This will display a one-page summary of the application and related contact information. The application status progress bar is shown at the top.



- Blue dot shows your application status.
- As your application progresses, the blue portion of the progress bar will move to the right. Occasionally, the blue bar may move left if, for example, an applicant responds to an inquiry (at the “Outreach” stage), and PIA is reviewing the response.
- Review Status” information, if applicable, will be displayed just under the left-hand end of the status bar.
- The following shows that the application has been funded.



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NEW REQUIREMENT FOR RECEIVING FUNDING

Starting July 1, 2016, USAC will issue E-rate reimbursement payments electronically directly to the applicant school or library. E-rate Applicants MUST complete an FCC Form 498, *Service Provider and Billed Entity Identification Number and Contact Information Form*, to provide USAC with their banking account information so that USAC can electronically deposit funds in their accounts.

To access Form 498:

1. Login to your EPC portal.
2. Click on Reports from the top menu
3. Click on My Landing Page
4. Click on the name of your school district or library system
5. On the left hand menu, under Summary, click on "Related Actions"
6. Click on "Create FCC Form 498"
7. Complete and Submit



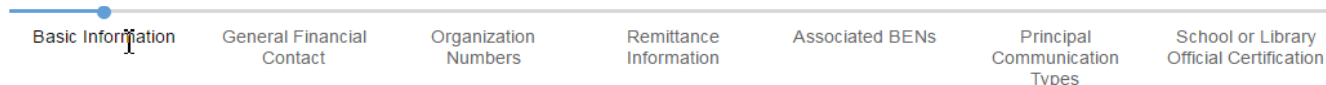
Summary
News
Related Actions •
Customer Service
Additional Information
Discount Rate
Contracts
FCC Forms
FRN Appeals



Create FCC Form 498

This function allows you to create an FCC Form 498 for your entity.

You must include the following information :



VIEW YOUR FUNDING COMMITMENTS:

- FCDLs are now being issued in the E-rate Productivity Center (EPC).
- FCDLs will show up in the Notifications section of your landing page and in the News feed for both applicants who have a commitment in the wave and for service providers whose Service Provider Identification Numbers are featured on those commitments.
- Applicants are notified weekly of each wave, shortly after the wave runs.
- The contact person listed on the FCC Form 471 will receive an email notifying him or her that an FCDL has been issued for a specific application. If you filed multiple FCC Forms 471 and more than one is included in the same wave, the contact person will receive an email for each form. (Service providers are notified weekly as well.)
- The General Contact for the service provider will receive an email telling him or her that one or more FRNs appear in the FCDLs in the wave. If a service provider has more than one SPIN and USAC issues funding decisions for more than one of the SPINs, the General Contact will receive an email notification for each SPIN that appears in the wave.

To view the FCDL:

1. The contact person clicks the link in the email to log in to EPC and go to the landing page.
2. In the new Notifications section of the organization's landing page, choose the notification type "FCDL"
3. And funding year "2016," then click "Generate Notification" in the right-column of the FCDL you would like to view.
4. The text will change to "View Notification." At this point, *any user* can click "View Notification" to be taken to the FCDL in the organization's News tab.
5. Applicants will see the short text of the applicant version of the FCDL and three attachments at the bottom including:
 - A. An FCDL supplement that contains related program information.
 - B. A link to a *.CSV file, which contains a simple table of the data such as the approved discount rate, whether or not the FRN was approved, the FCDL comment, and so on – that in the past would have been in the funding commitment report in the paper version of the FCDL. This table will have one FRN per row and will include all FRNs that were listed on the FCC Form 471. This file can be opened with any spreadsheet program.
 - C. A link to the FCC Form 471.



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TRACK/REVIEW YOUR PIA RESPONSES:

1. On your landing page, scroll down to FCC Forms
2. Select FCC Form 471 and Funding Year 2016
3. Click on the form name to open the basic information page
4. Choose from the left navigation selections REVIEW INQUIRIES
5. Outstanding PIA questions show as Pending Inquiries
6. Click the "+" sign next to Submitted Inquiries to read all questions and responses.

KSLLC EPC MANAGEMENT ACTIONS CONDUCTED ON BEHALF OF OUR CLIENTS:

1. Reviews your profile information and makes any necessary updates or corrections prior to starting your application(s).

This information includes the following:

- **All applicants**– contact information for the organization; a contract record for each contract; your FCC Registration Number (obtained from the [CORES website](http://cores.org)); urban/rural status (updates if incorrect or provides if missing)
- **School districts and independent schools** – contact information, student counts, school attributes, and alternative discount information for each school; makes sure answers to connectivity questions are complete
- **Libraries and library systems** – contact information, square footage, and library attributes for each library; exactly one library designated as the main branch; makes sure answers to connectivity questions are complete
- **Consortia** – contact information, a complete list of your consortium members.

2. Program Integrity Assurance (PIA) questions and replies on your behalf. If the Account Manager needs additional information they will reach out to you. If you are concerned that the questions aren't answered promptly, please reach out to your Account Manager rather than replying to the questions.

Notes:

NEED HELP? Contact your Account Manager or go to Kellogg & Sovereign websites at www.kelloggllc.com or www.erate470.com, and/or search USAC News Briefs at www.usac.org/sl/tools/new-briefs/.