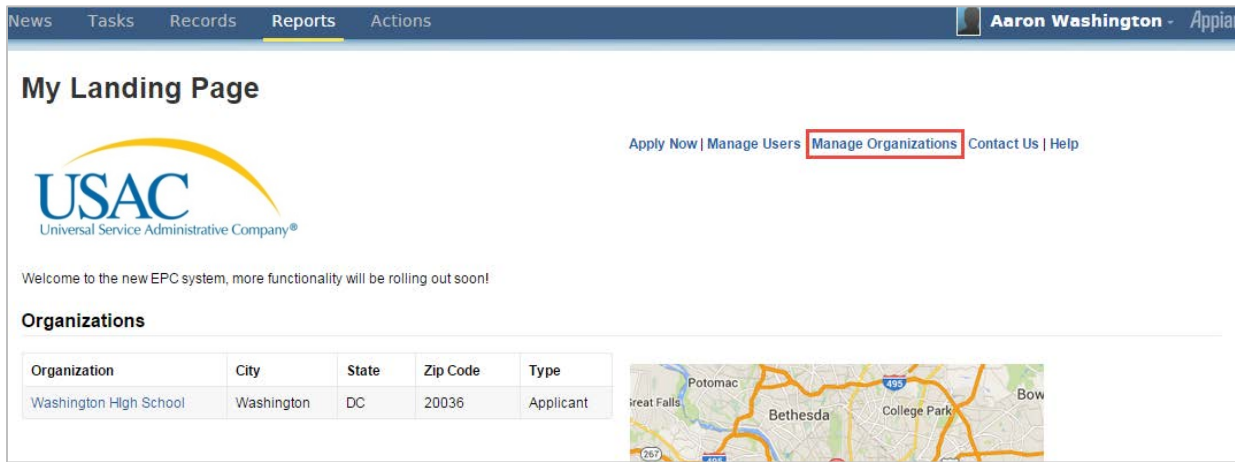


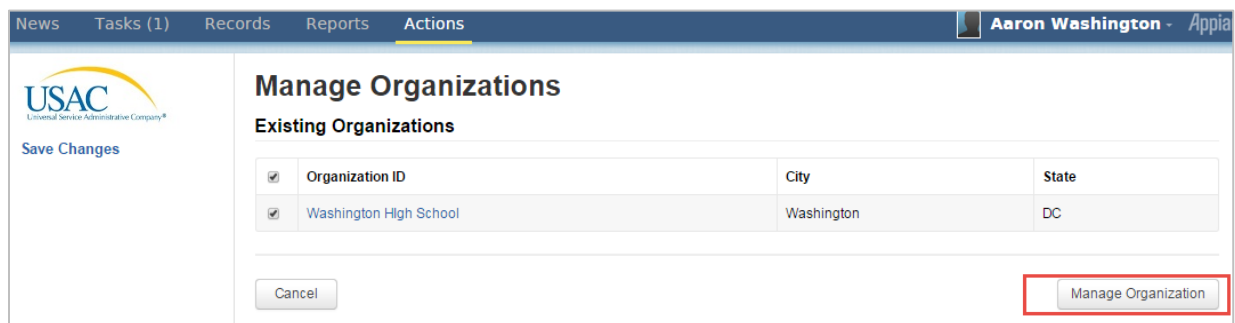
E-RATE PRODUCTIVITY CENTER (EPC) APPLICANT USER GUIDE

Managing Your Organization

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



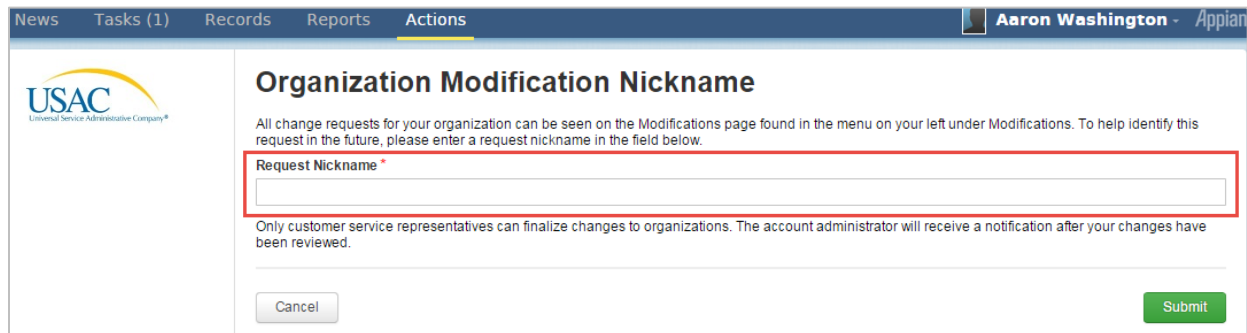
2. Select your organization from the list.
3. Click **Manage Organization**.



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

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

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



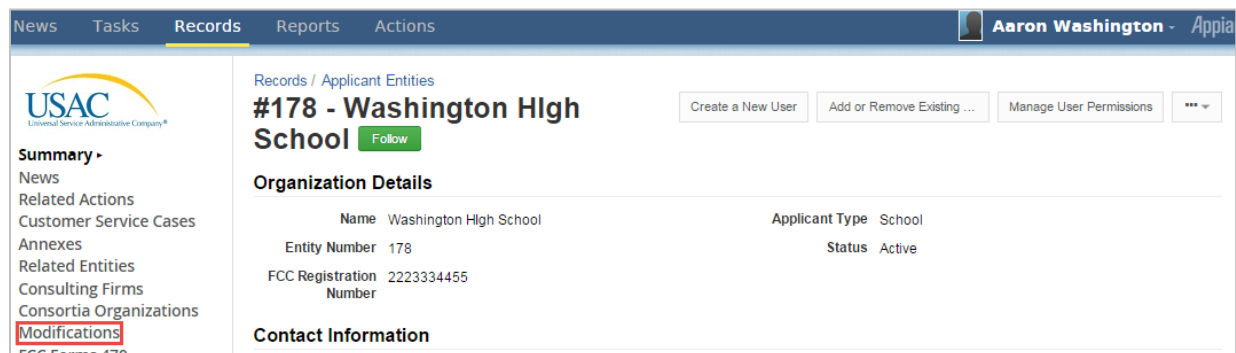
8. **Submit** your modification request.

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.

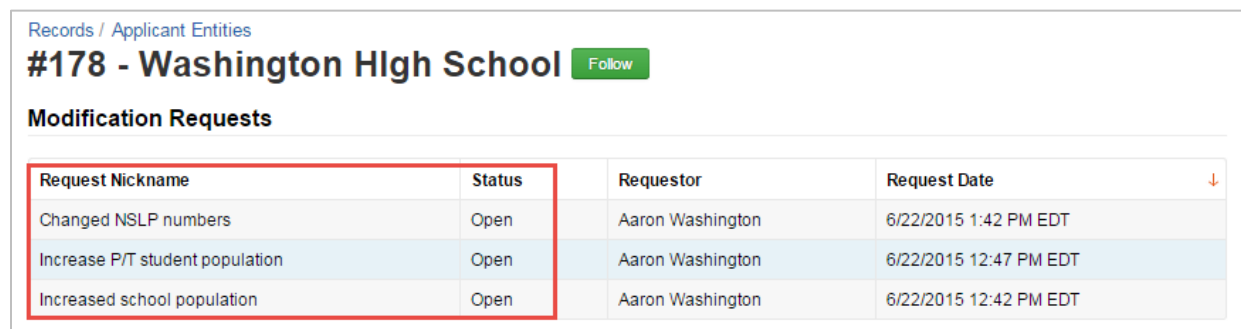
View Organization Modification Status

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.



| Request Nickname | Status | Requestor | Request Date |
|---------------------------------|--------|------------------|------------------------|
| Changed NSLP numbers | Open | Aaron Washington | 6/22/2015 1:42 PM EDT |
| Increase P/T student population | Open | Aaron Washington | 6/22/2015 12:47 PM EDT |
| Increased school population | Open | Aaron Washington | 6/22/2015 12:42 PM EDT |

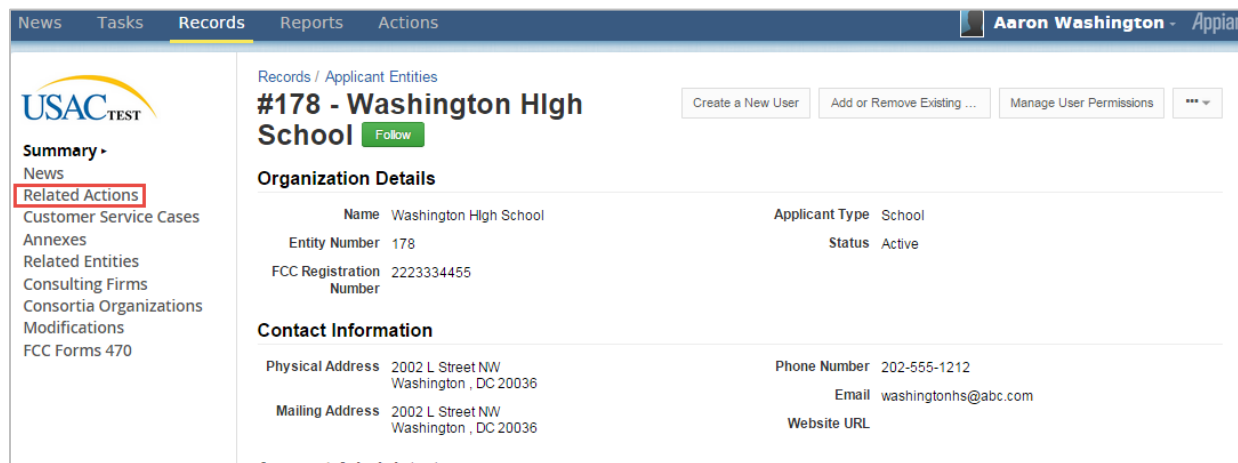
DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

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.

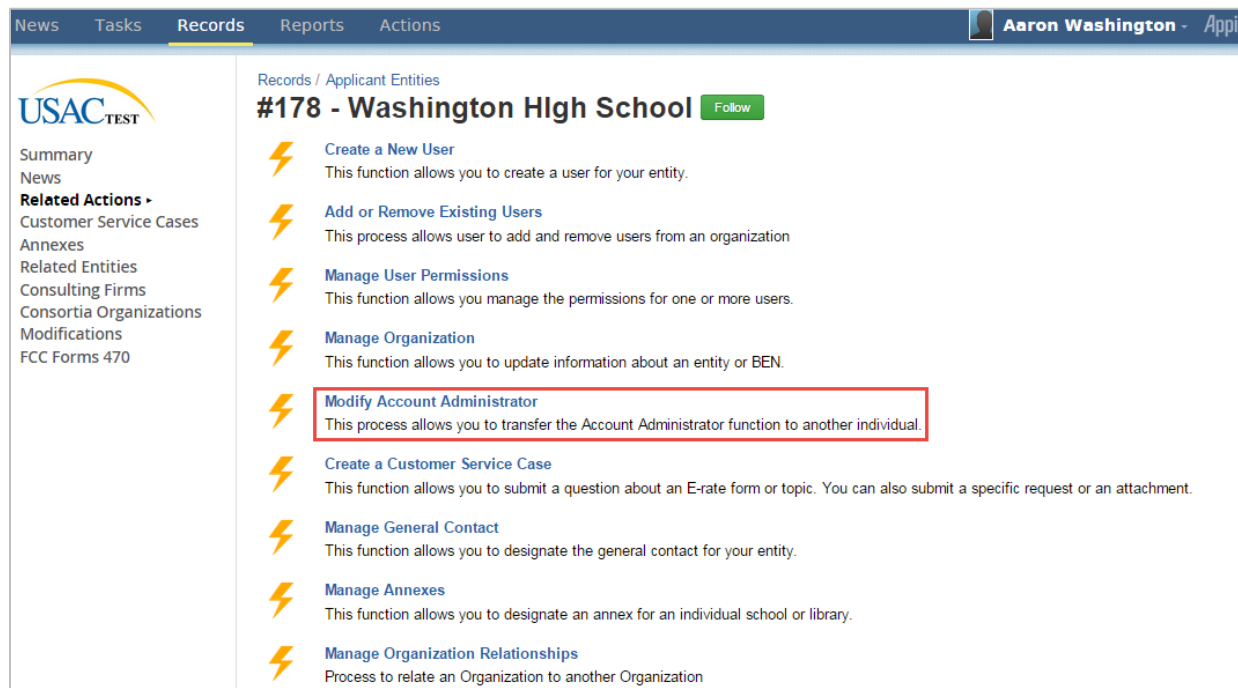
To transfer the account administrator function from one individual to another, follow these instructions:

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



The screenshot shows the USAC TEST interface. The top navigation bar includes 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. The user is logged in as 'Aaron Washington'. The main content area displays 'Records / Applicant Entities' for '#178 - Washington High School'. A left-hand menu is visible with 'Related Actions' highlighted in red. The main content area shows 'Organization Details' and 'Contact Information' for the school.

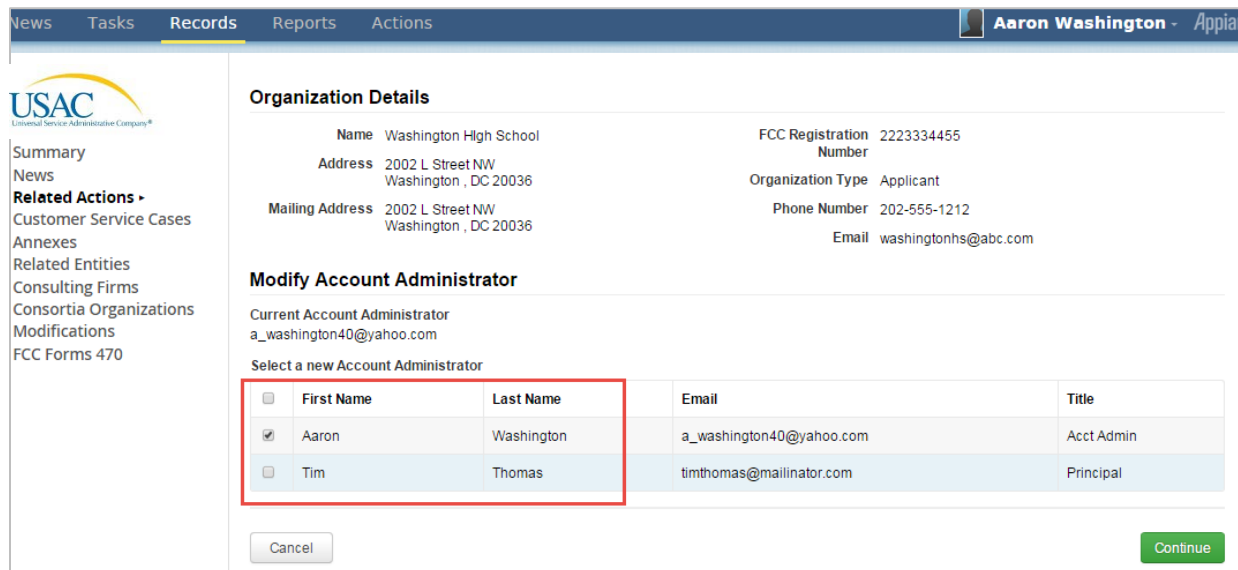
3. Select **Modify Account Administrator**.



The screenshot shows the USAC TEST interface. The top navigation bar includes 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. The user is logged in as 'Aaron Washington'. The main content area displays 'Records / Applicant Entities' for '#178 - Washington High School'. A left-hand menu is visible with 'Related Actions' highlighted in red. The main content area shows a list of actions, with 'Modify Account Administrator' highlighted in red. The description for this action is: 'This process allows you to transfer the Account Administrator function to another individual.'

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

- 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.



Organization Details

Name: Washington High School
 Address: 2002 L Street NW, Washington, DC 20036
 Mailing Address: 2002 L Street NW, Washington, DC 20036

FCC Registration Number: 2223334455
 Organization Type: Applicant
 Phone Number: 202-555-1212
 Email: washingtonhs@abc.com

Modify Account Administrator

Current Account Administrator: a_washington40@yahoo.com

Select a new Account Administrator

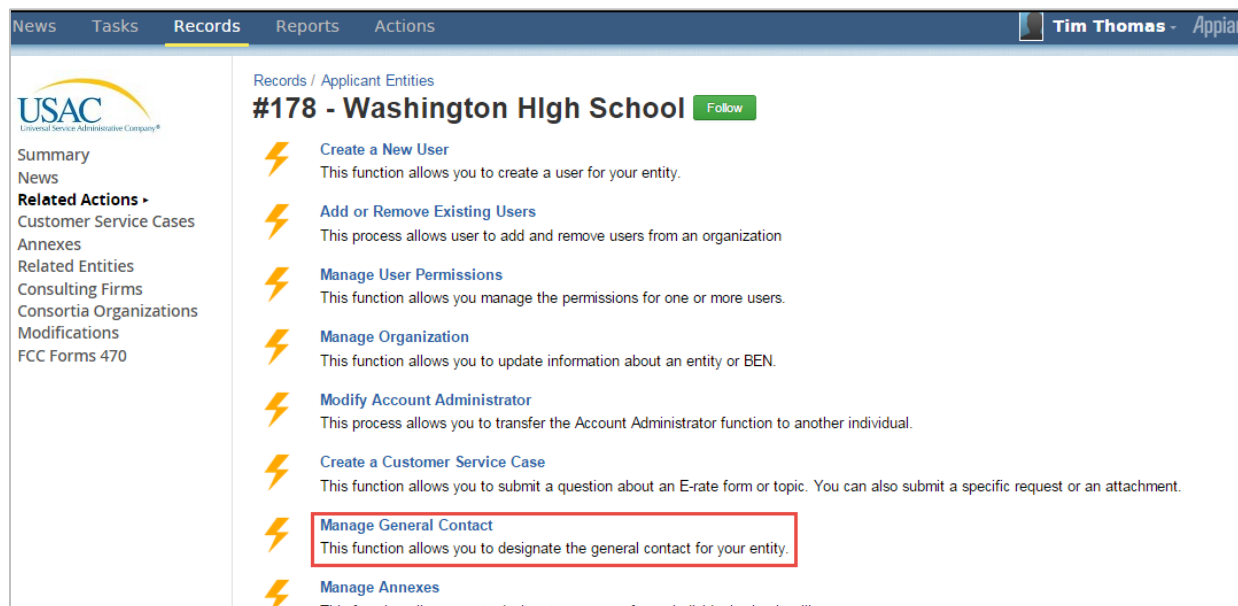
| <input type="checkbox"/> | First Name | Last Name | Email | Title |
|-------------------------------------|------------|------------|---------------------------|------------|
| <input checked="" type="checkbox"/> | Aaron | Washington | a_washington40@yahoo.com | Acct Admin |
| <input type="checkbox"/> | Tim | Thomas | timthomas@maillinator.com | Principal |

Buttons: Cancel, Continue

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

Manage General Contact

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



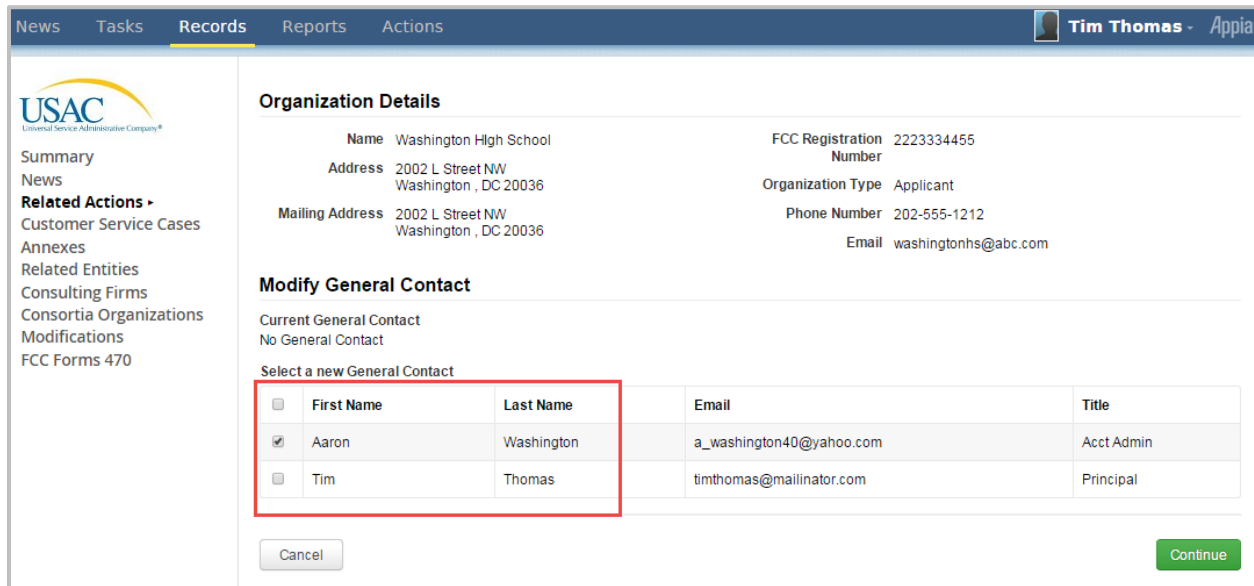
Records / Applicant Entities

#178 - Washington High School [Follow](#)

- Create a New User**
This function allows you to create a user for your entity.
- Add or Remove Existing Users**
This process allows user to add and remove users from an organization
- Manage User Permissions**
This function allows you manage the permissions for one or more users.
- Manage Organization**
This function allows you to update information about an entity or BEN.
- Modify Account Administrator**
This process allows you to transfer the Account Administrator function to another individual.
- Create a Customer Service Case**
This function allows you to submit a question about an E-rate form or topic. You can also submit a specific request or an attachment.
- Manage General Contact**
This function allows you to designate the general contact for your entity.
- Manage Annexes**
This function allows you to designate an annex for an individual school or library.

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

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



Organization Details

Name: Washington High School
 Address: 2002 L Street NW, Washington, DC 20036
 Mailing Address: 2002 L Street NW, Washington, DC 20036
 FCC Registration Number: 2223334455
 Organization Type: Applicant
 Phone Number: 202-555-1212
 Email: washingtonhs@abc.com

Modify General Contact

Current General Contact: No General Contact

Select a new General Contact

| <input type="checkbox"/> | First Name | Last Name | Email | Title |
|-------------------------------------|------------|------------|--------------------------|------------|
| <input checked="" type="checkbox"/> | Aaron | Washington | a_washington40@yahoo.com | Acct Admin |
| <input type="checkbox"/> | Tim | Thomas | timthomas@mailinator.com | Principal |

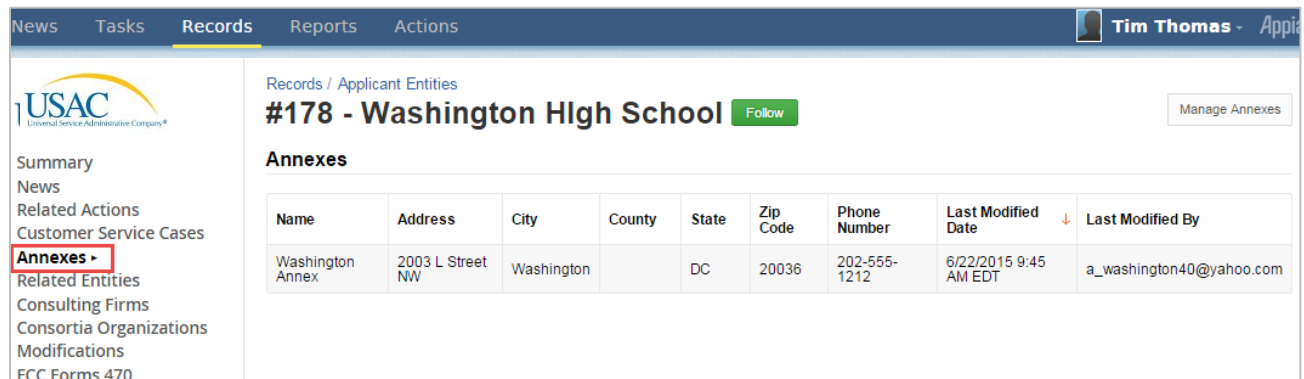
Buttons: Cancel, Continue

- Click **Continue**.
- 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.



Records / Applicant Entities

#178 - Washington High School Follow Manage Annexes

Annexes

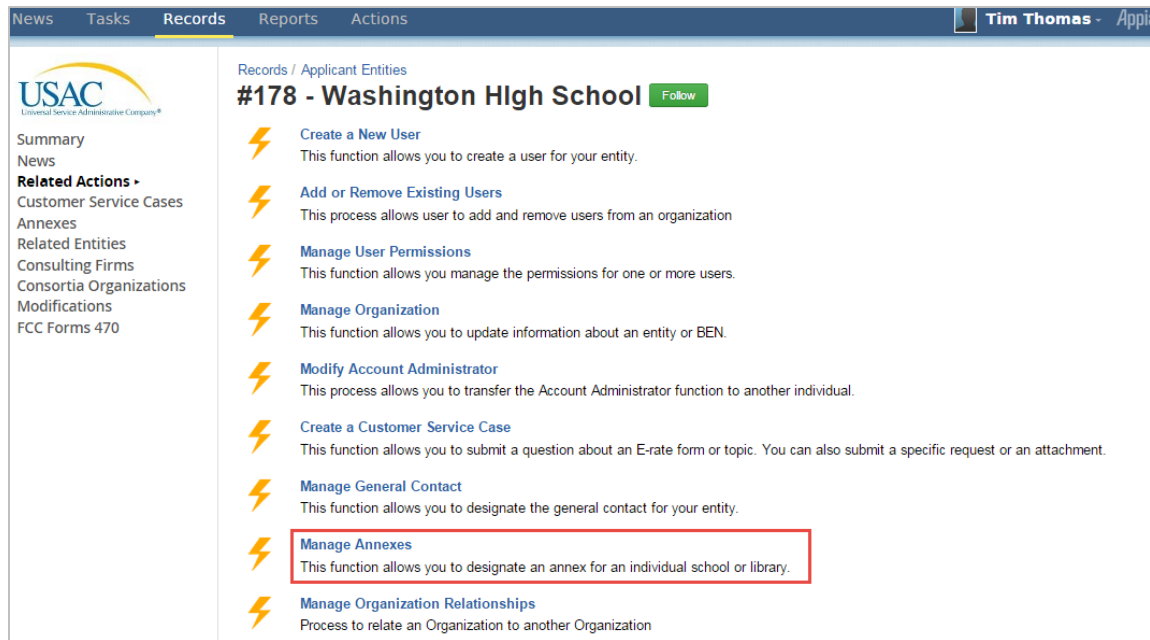
| Name | Address | City | County | State | Zip Code | Phone Number | Last Modified Date | Last Modified By |
|------------------|------------------|------------|--------|-------|----------|--------------|-----------------------|--------------------------|
| Washington Annex | 2003 L Street NW | Washington | | DC | 20036 | 202-555-1212 | 6/22/2015 9:45 AM EDT | a_washington40@yahoo.com |

Manage Annexes

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

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

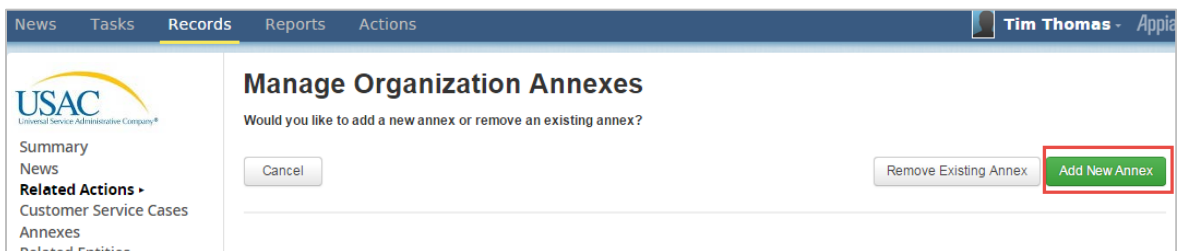
3. Select **Manage Annexes**.



The screenshot shows the 'Records / Applicant Entities' page for entity #178 - Washington High School. A list of actions is displayed, with 'Manage Annexes' highlighted by a red rectangular box. The actions include: Create a New User, Add or Remove Existing Users, Manage User Permissions, Manage Organization, Modify Account Administrator, Create a Customer Service Case, Manage General Contact, **Manage Annexes**, and Manage Organization Relationships.

To Add a New Annex

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

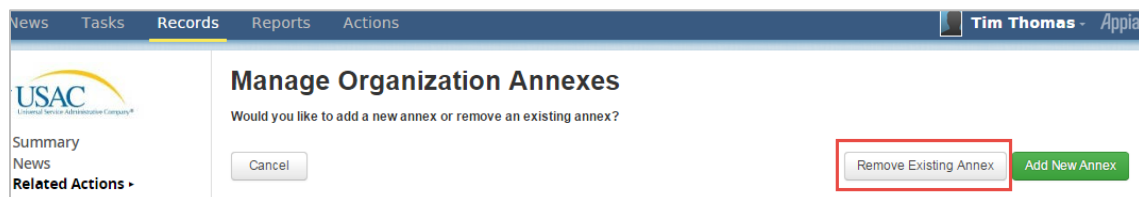


The screenshot shows the 'Manage Organization Annexes' page with the question 'Would you like to add a new annex or remove an existing annex?'. Three buttons are visible: 'Cancel', 'Remove Existing Annex', and 'Add New Annex'. The 'Add New Annex' button is highlighted with a red rectangular box.

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**.



The screenshot shows the 'Manage Organization Annexes' page with the question 'Would you like to add a new annex or remove an existing annex?'. Three buttons are visible: 'Cancel', 'Remove Existing Annex', and 'Add New Annex'. The 'Remove Existing Annex' button is highlighted with a red rectangular box.

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

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

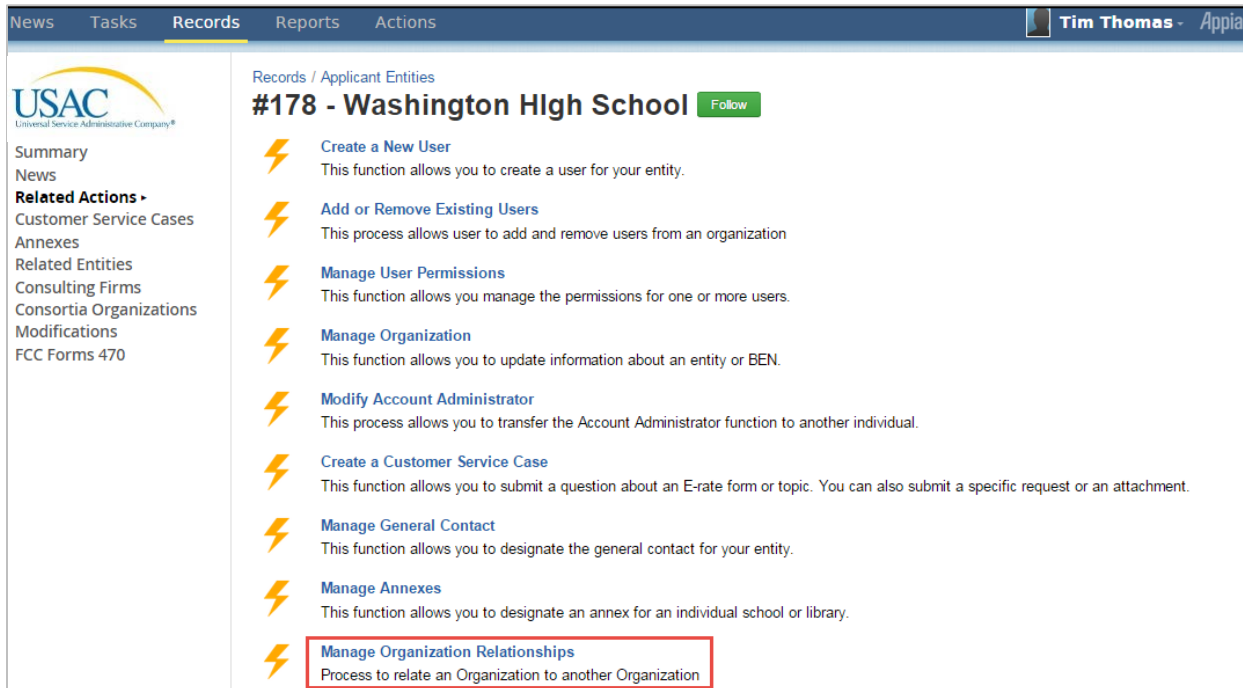
Manage Organization Relationships

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

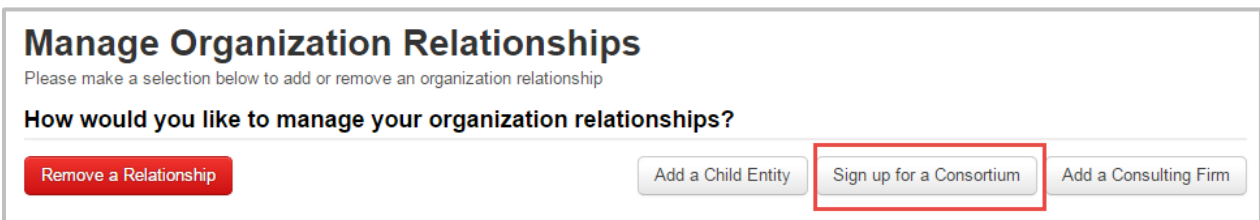
Applicant entities such as schools and libraries can sign up for a consortium.

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**.



The screenshot shows the USAC web application interface. At the top, there are navigation tabs: News, Tasks, Records (selected), Reports, and Actions. The user's name 'Tim Thomas' and 'Appia' are visible in the top right. The main content area is titled 'Records / Applicant Entities' and shows '#178 - Washington High School' with a 'Follow' button. A list of actions is displayed, each with a lightning bolt icon and a description. The 'Manage Organization Relationships' action is highlighted with a red box. The left sidebar contains a 'Related Actions' menu with options like 'Customer Service Cases', 'Annexes', 'Related Entities', 'Consulting Firms', 'Consortia Organizations', 'Modifications', and 'FCC Forms 470'.

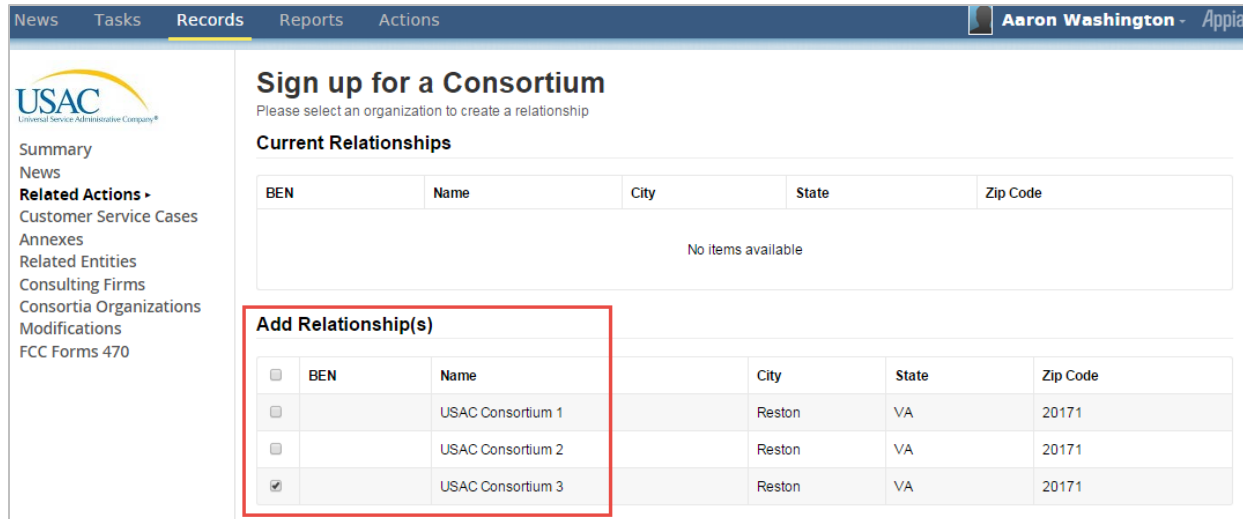
4. On the **Manage Organization Relationships** page, select **Sign up for a Consortium**.



The screenshot shows the 'Manage Organization Relationships' page. The title is 'Manage Organization Relationships' and the subtitle is 'Please make a selection below to add or remove an organization relationship'. The main heading is 'How would you like to manage your organization relationships?'. Below this heading are four buttons: 'Remove a Relationship' (red), 'Add a Child Entity', 'Sign up for a Consortium' (highlighted with a red box), and 'Add a Consulting Firm'.

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.

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships



Sign up for a Consortium
Please select an organization to create a relationship

Current Relationships

| BEN | Name | City | State | Zip Code |
|--------------------|------|------|-------|----------|
| No items available | | | | |

Add Relationship(s)

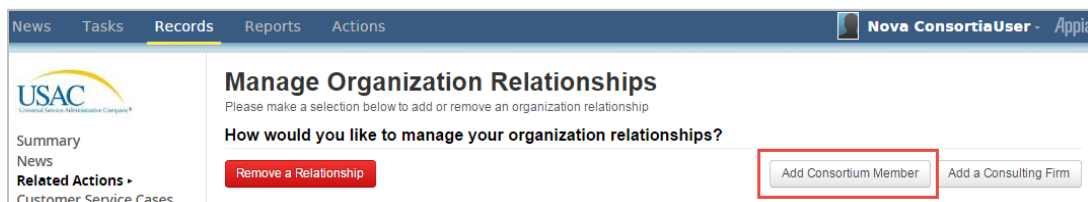
| <input type="checkbox"/> | BEN | Name | City | State | Zip Code |
|-------------------------------------|-----|-------------------|--------|-------|----------|
| <input type="checkbox"/> | | USAC Consortium 1 | Reston | VA | 20171 |
| <input type="checkbox"/> | | USAC Consortium 2 | Reston | VA | 20171 |
| <input checked="" type="checkbox"/> | | USAC Consortium 3 | Reston | VA | 20171 |

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**.

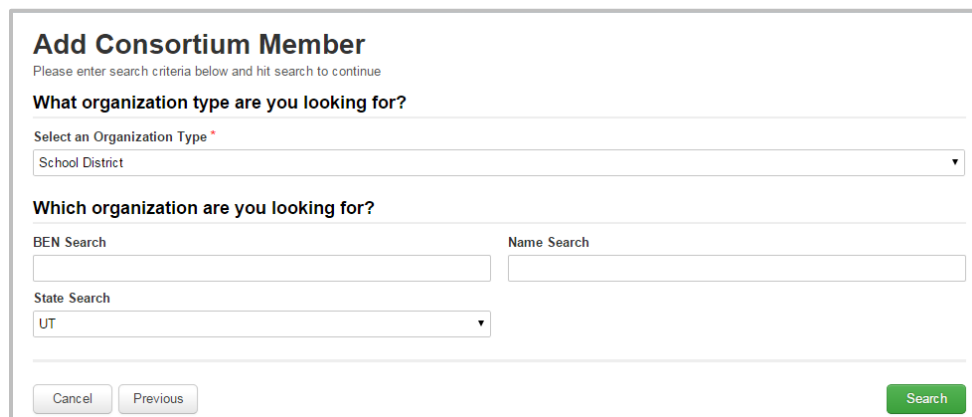


Manage Organization Relationships
Please make a selection below to add or remove an organization relationship

How would you like to manage your organization relationships?

Remove a Relationship Add Consortium Member Add a Consulting Firm

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.



Add Consortium Member
Please enter search criteria below and hit search to continue

What organization type are you looking for?

Select an Organization Type *

School District

Which organization are you looking for?

BEN Search Name Search

State Search

UT

Cancel Previous Search

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

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

| Add Relationship(s) | | | | | | |
|--------------------------|-----|-----------------------|----------------------|-----------|-------|----------|
| <input type="checkbox"/> | BEN | Name | ↑ Address | City | State | Zip Code |
| <input type="checkbox"/> | 153 | Annandale High School | 4700 Medford Dr | Annandale | VA | 22003 |
| <input type="checkbox"/> | 165 | Center High School | 417 Morningstar Lane | Chantilly | VA | 20151 |

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**.

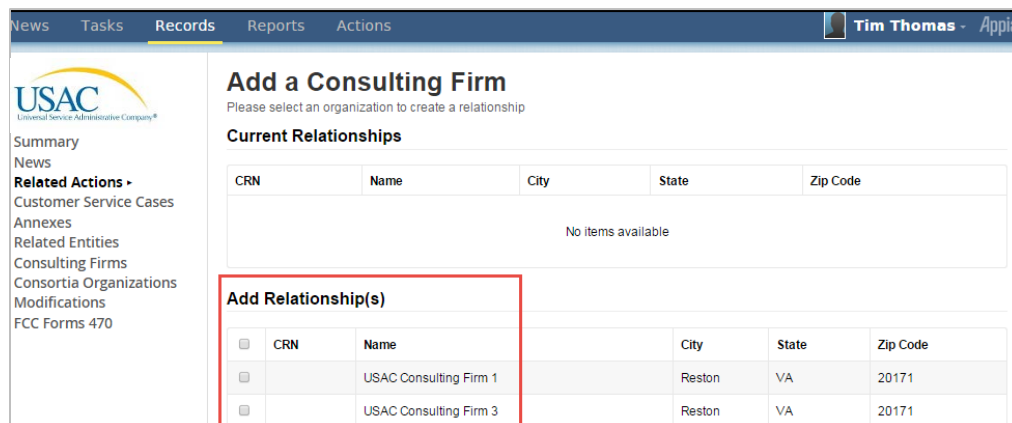
Manage Organization Relationships

Please make a selection below to add or remove an organization relationship

How would you like to manage your organization relationships?

Remove a Relationship
Add Consortium Member
Add a 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.



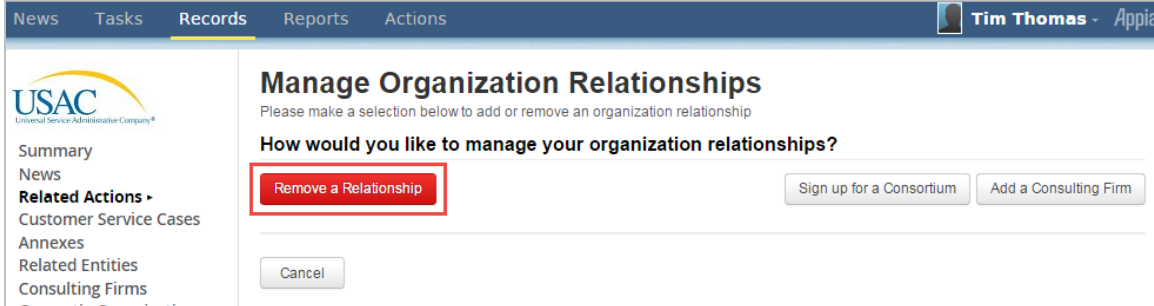
8. Select **Submit**.

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships

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.

DISCUSSED IN THIS GUIDE: Managing your organization, modifying account administrators, managing a General Contact, managing annexes, managing organization relationships