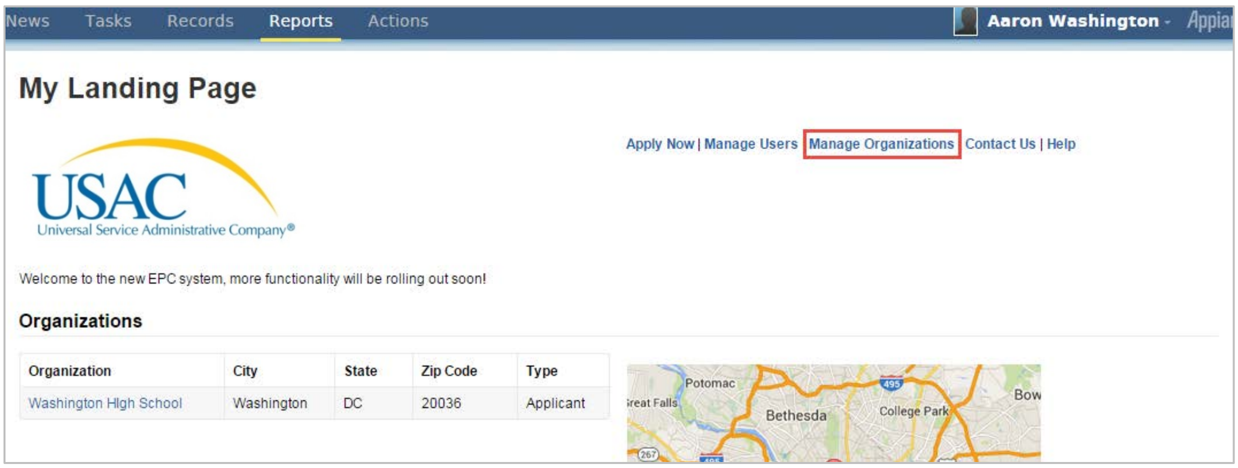
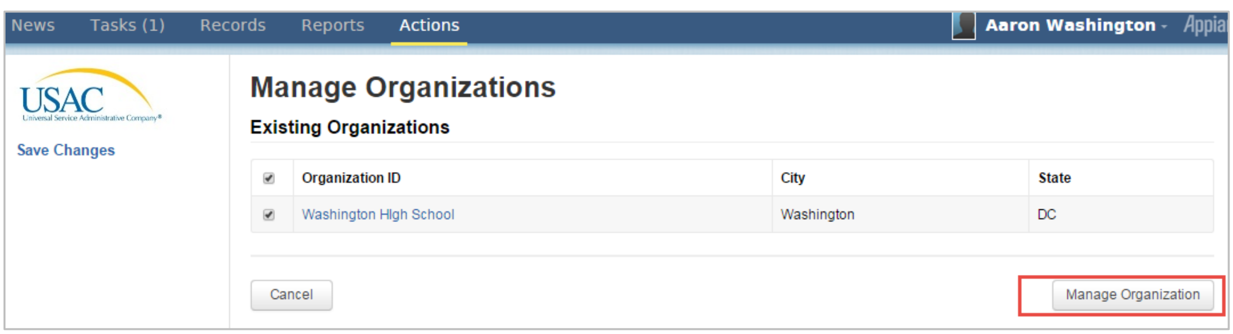
E-RATE PRODUCTIVITY CENTER (EPC) APPLICANT USER GUIDE

Managing Your Organization

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



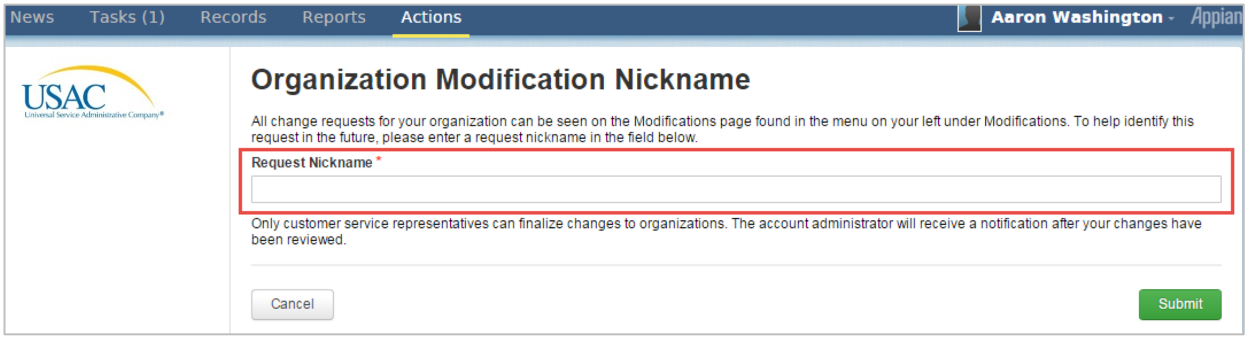
2. Select your organization from the list.
3. Click **Manage Organization**.



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.



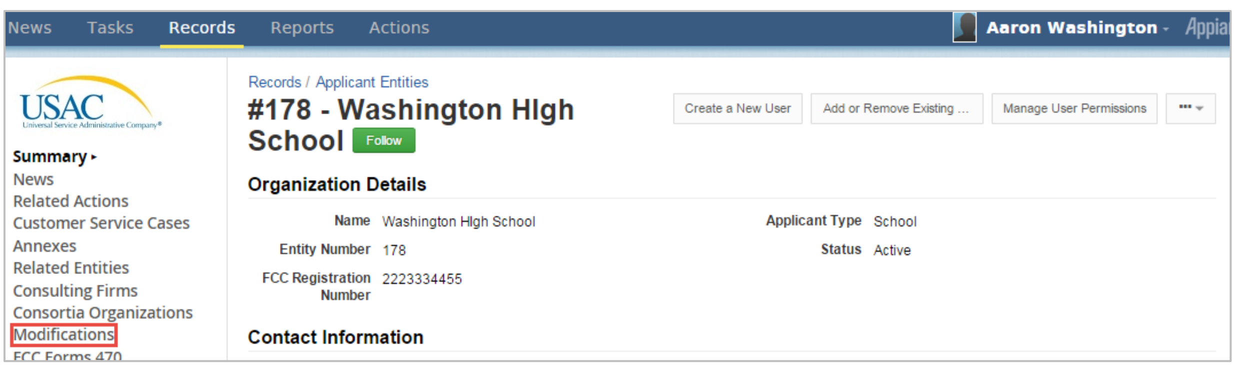
8. **Submit** your modification request.

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.

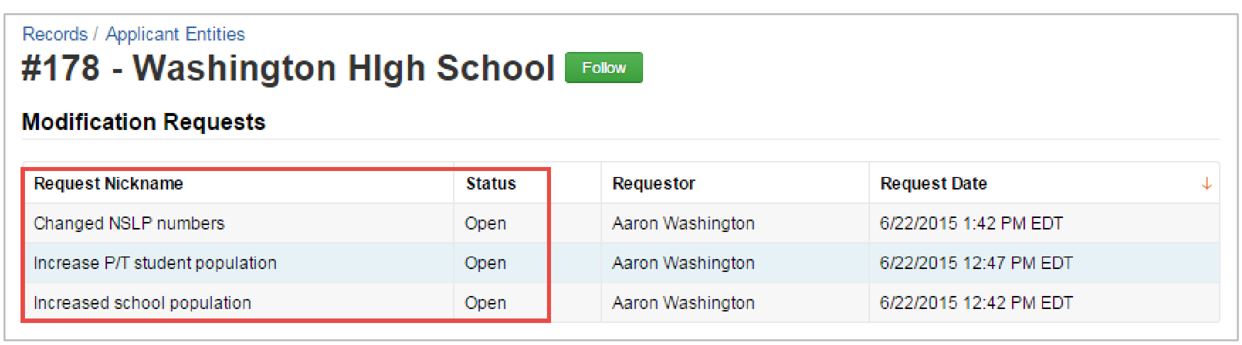
View Organization Modification Status

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.

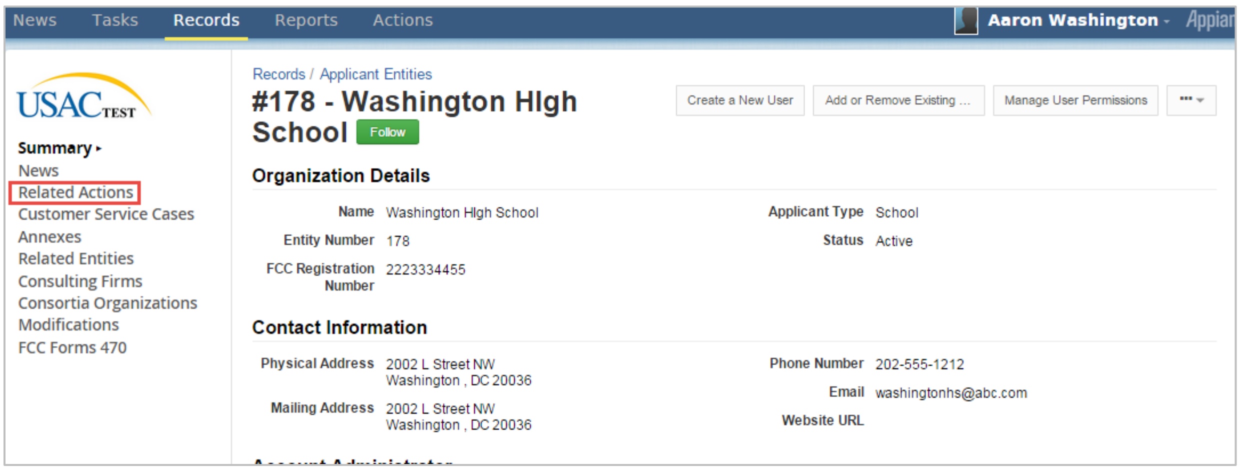


Modify Account Administrator

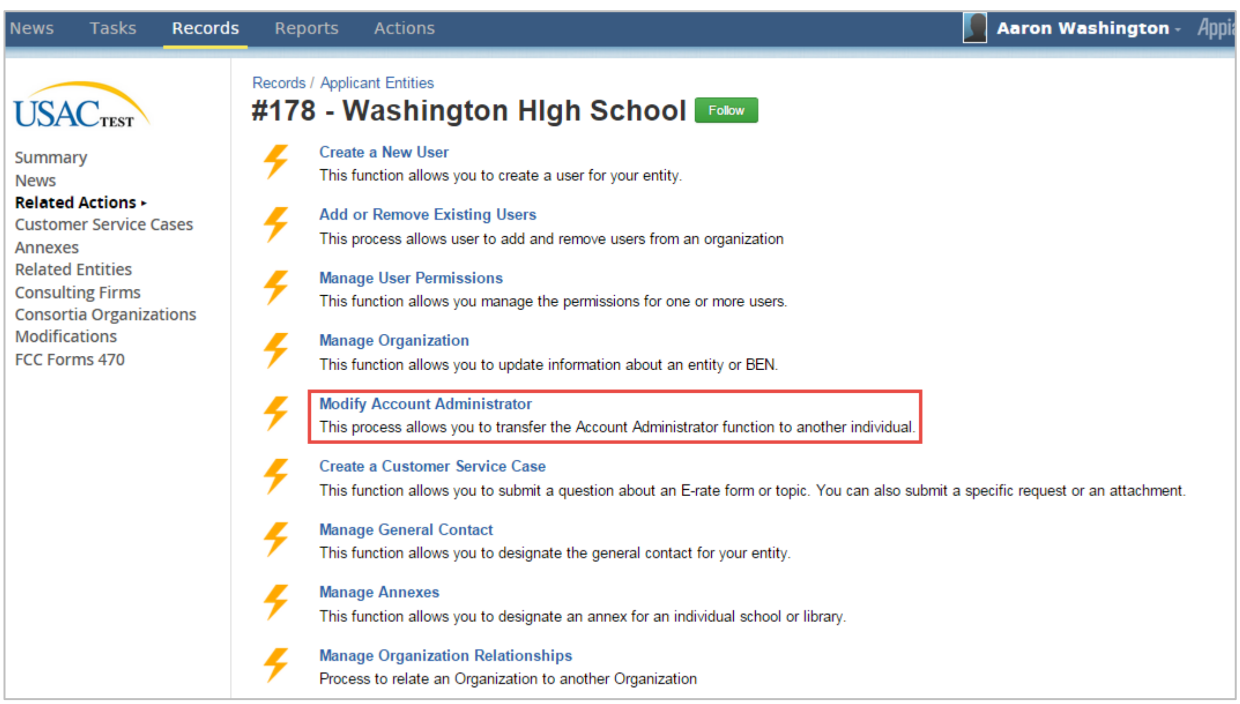
The account administrator can manage the organization account and its users; however he or she will not have permission to file forms by default. To assign the account administrator rights to create and certify FCC forms, see the "Manage User Permissions" section in the EPC "Managing Users" guide for 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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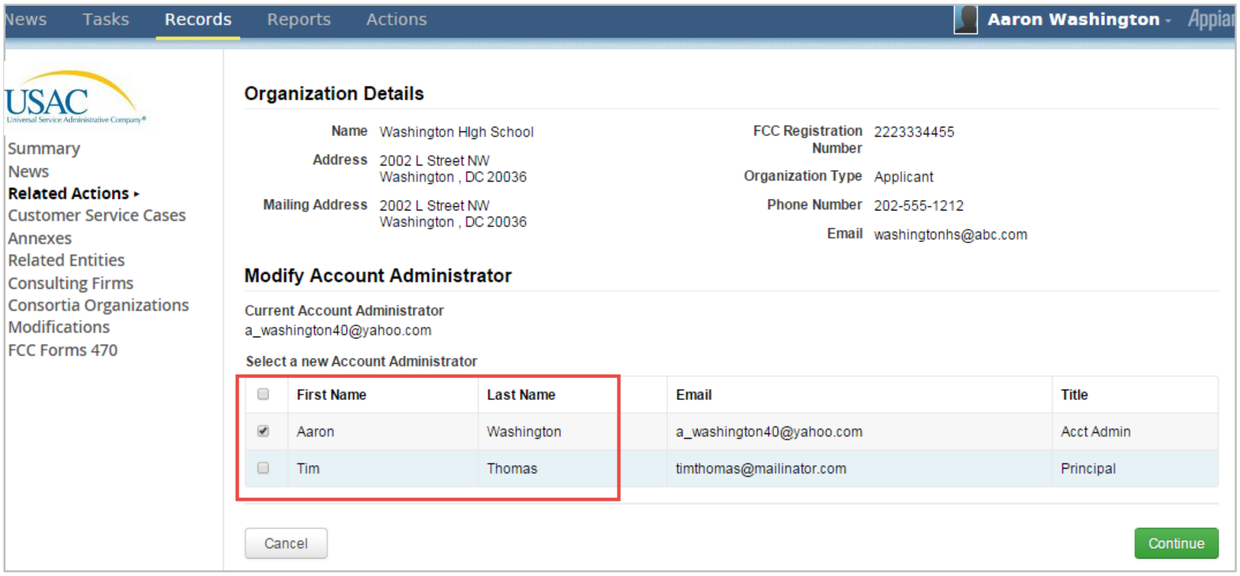
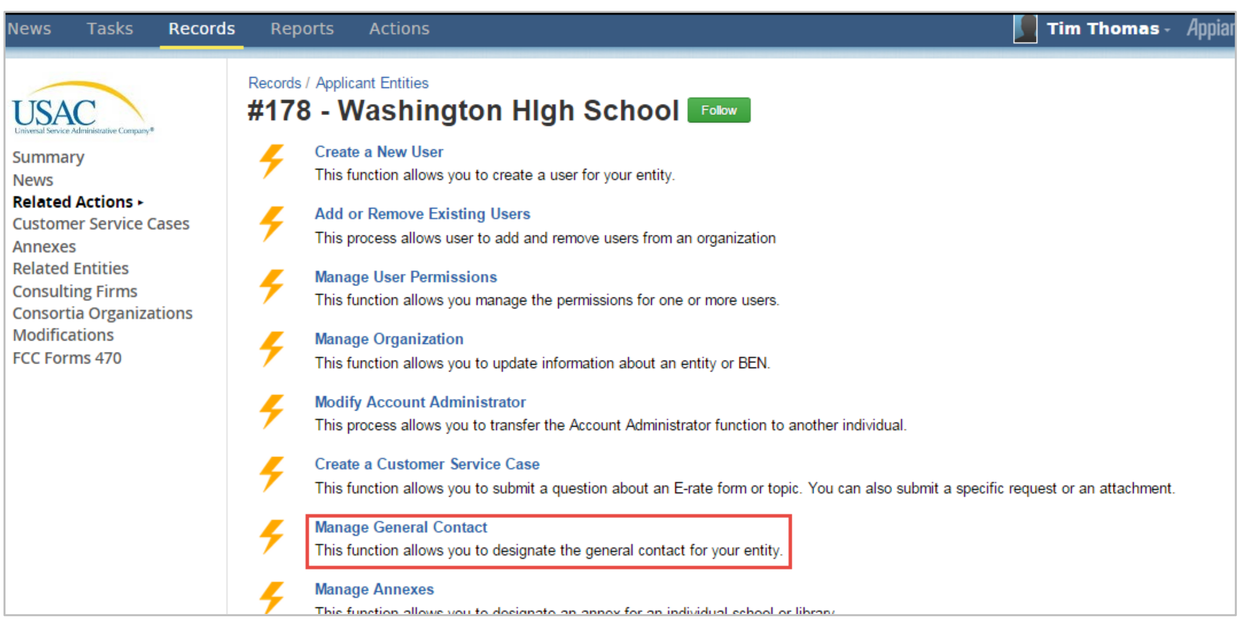
4. The **Organization Details** page opens and displays users. To change the account administrator, uncheck the box for the current administrator if necessary, then select the new administrator from the list.



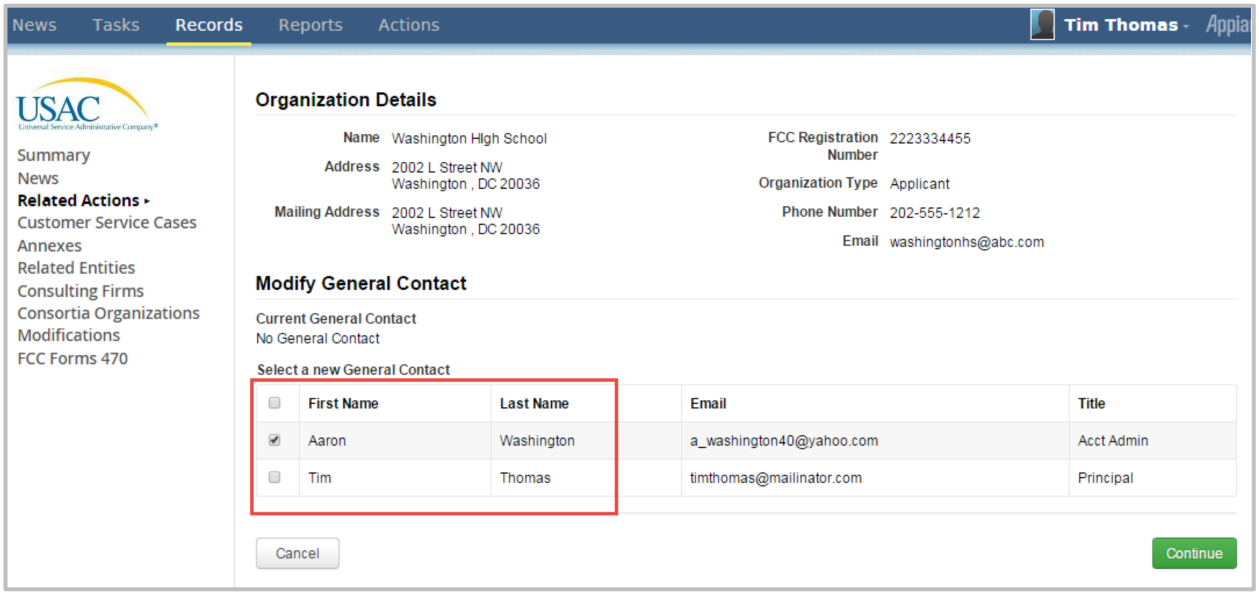
5. Select **Continue**.
6. Confirm the new account administrator information on the next page, then select **Submit.**

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**.



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.

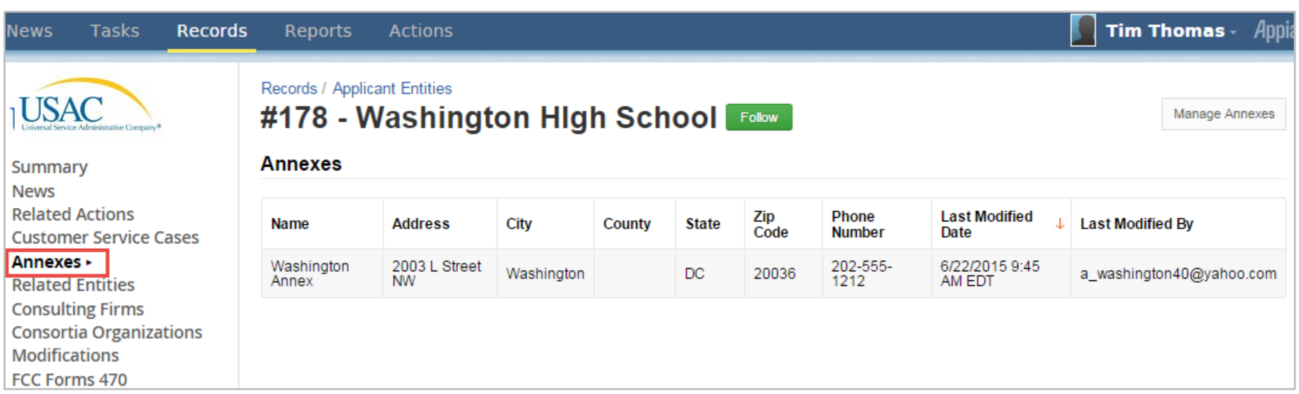


6. Click **Continue.**
7. Confirm the new General Contact information on the next page, then select **Submit.**

View Annex

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

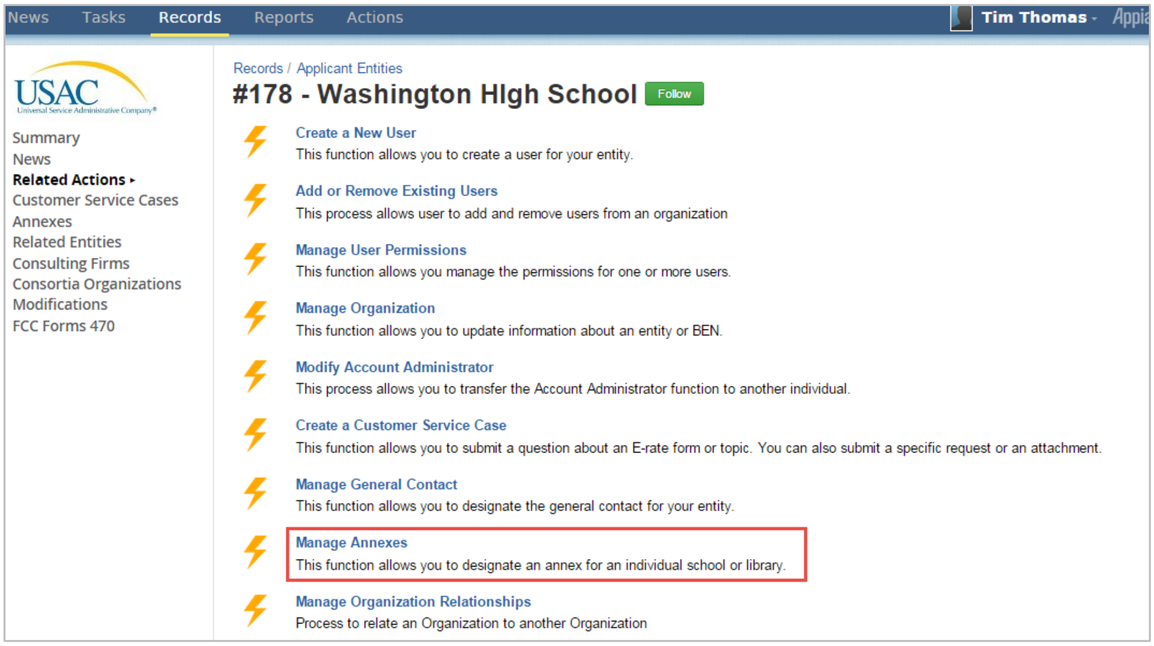
You can view your current annexes, if any, by selecting **Annexes** on the left-hand menu.



Manage Annexes

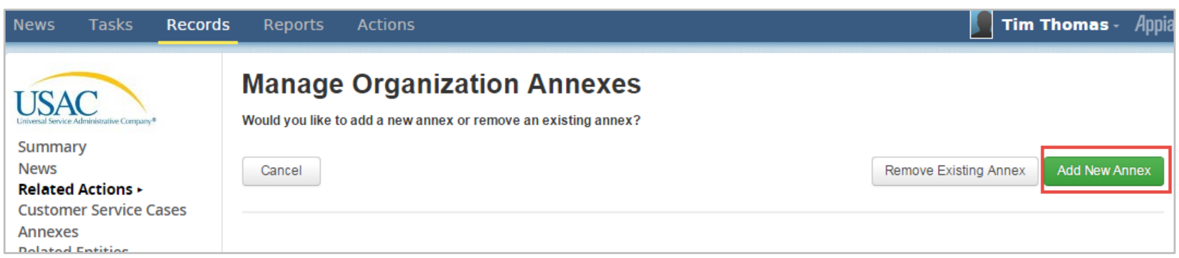
1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.

3. Select **Manage Annexes**.



To Add a New Annex

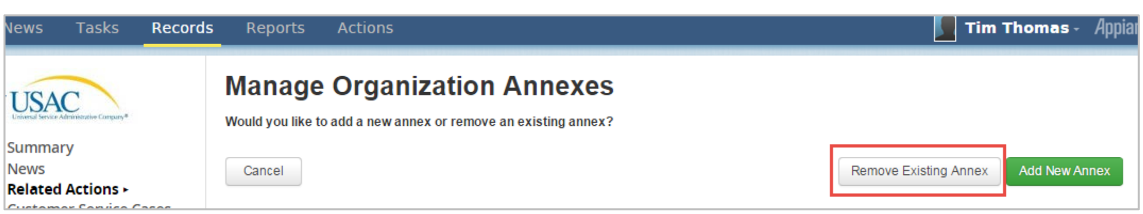
1. On the **Manage Organization Annexes** page, select **Add New Annex**.



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.

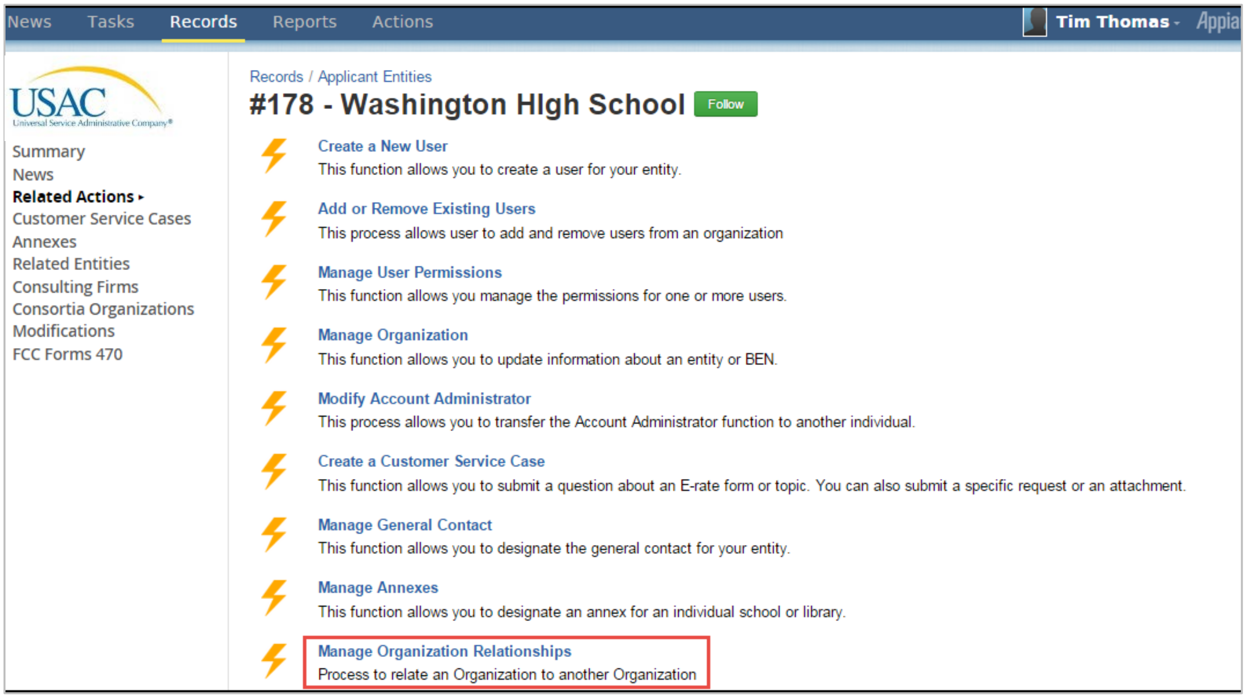
Manage Organization Relationships

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).

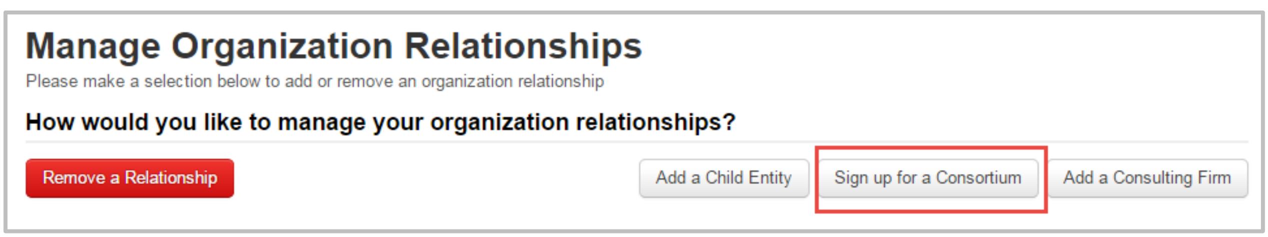
Sign up for a Consortium

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

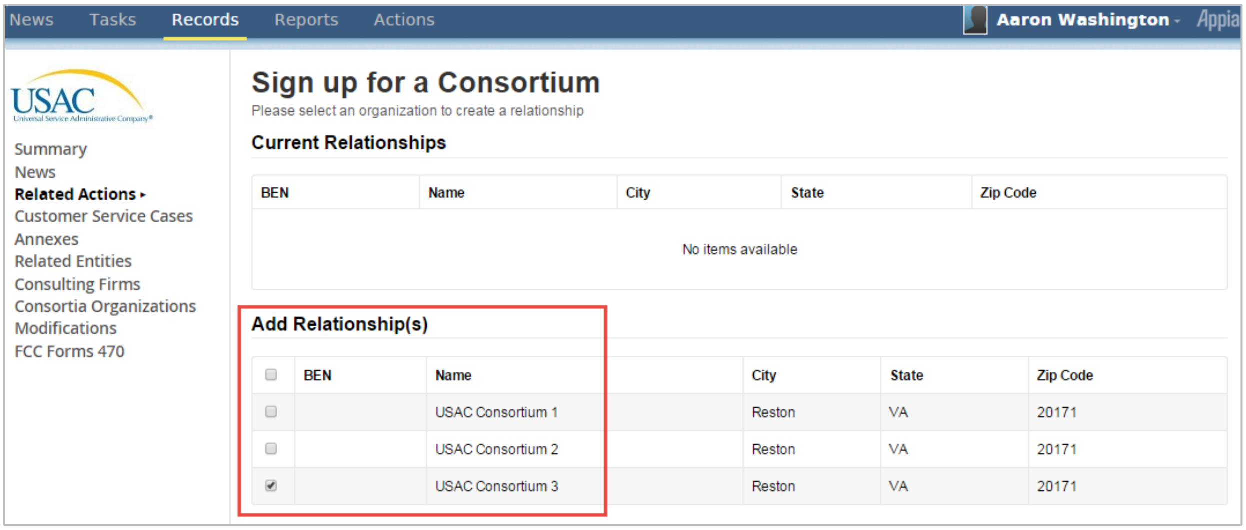
1. On your landing page, select the link to your organization.
2. On the left-hand menu, select **Related Actions**.
3. Select **Manage Organization Relationships**.



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.

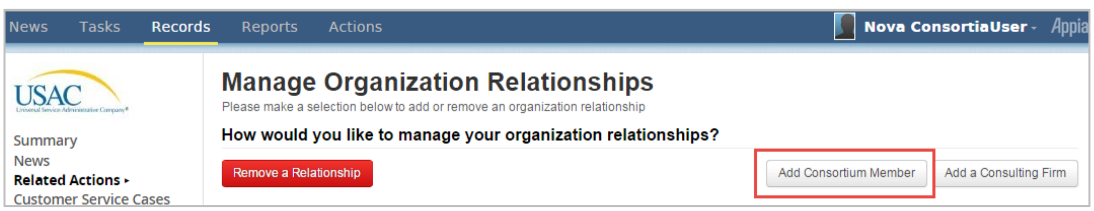


8. Select **Submit.**
6. Confirm by clicking **Yes** in the pop-up window. The account administrator for the consortium will receive an email indicating the organization modification.

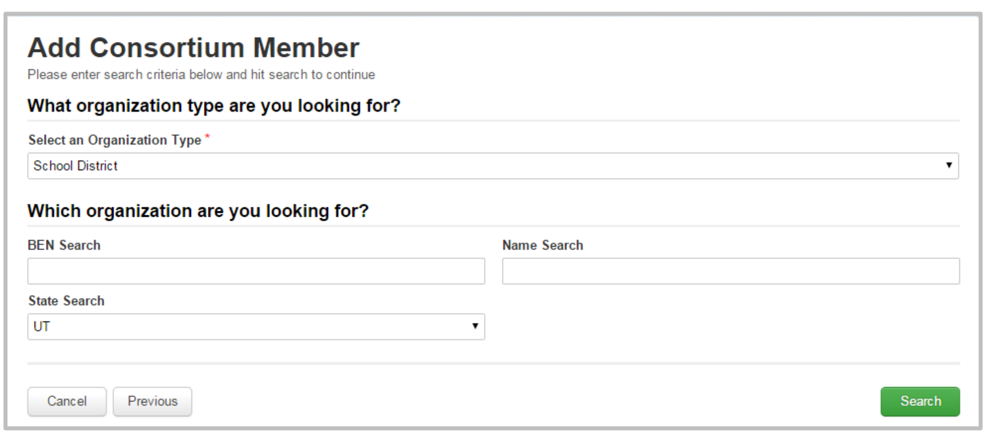
Add a Consortium Member

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.



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

Add Relationship(s)

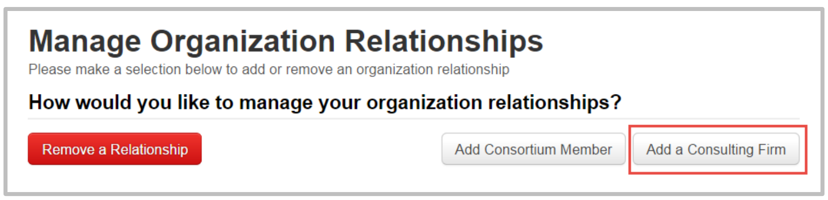
BEN	Name	Address	City	State	Zip Code
153	Annandale High School	4700 Medford Dr	Annandale	VA	22003
165	Center High School	417 Morningstar Lane	Chantilly	VA	20151

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.

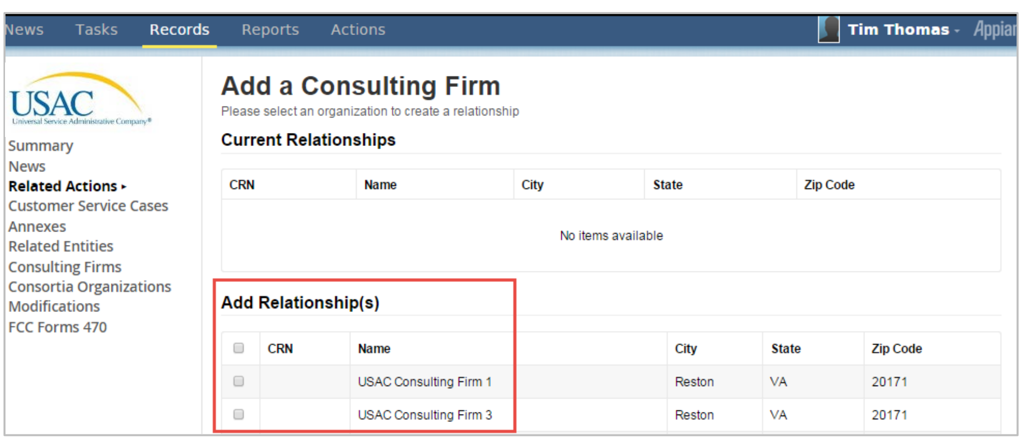
NOTE: Individual members have the option to delete the relationship to the consortium if they do not wish to belong to it.

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**.



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.

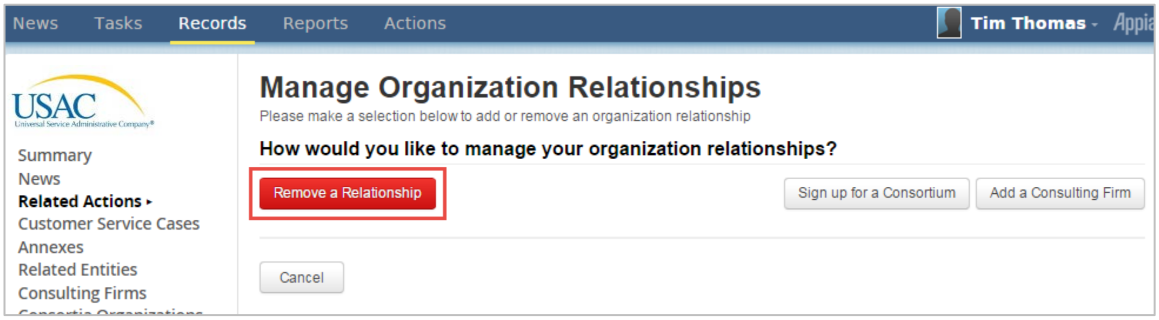


8. Select **Submit.**

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.