Administrative Window Checklist

✓	QUESTION	INSTRUCTIONS
	Is the Account Administrator correct?	Page 2
	Is there an individual(s) associated with the library that needs to be added as a user?	Page 4
	Are there any entities associated with the library that need to be added (for example, an annex or a consulting firm)?	Page 6
	Are there any entities associated with the library that need to be removed?	Page 10
	Is there an individual(s) no longer with the library that needs to be removed from the list of users?	Page 14
	Do any user permissions need to be updated?	Page 16
	Does the library's square footage need to be updated?	Page 17
	Does the library's tribal status need to be updated? **NOTE**: Only libraries that have a letter from a tribe can be listed as a Tribal Library.	Page 18
	Are the library's contact information and address correct?	Page 19
	Is the library's FCC Registration Number (FCC RN) correct?	Page 20

Is the Account Administrator correct? To check this, follow the steps below.

NOTE: The email address associated with the Account Administrator's user account is where USAC will send important email correspondence.

If you are new to the library and will be the Account Administrator, you need to get set up in USAC.

To get set up as the Account Administrator in the E-Rate Productivity Center (EPC), the administrative portal for E-Rate, you will need to submit to USAC a request written on the library's letterhead and signed by you.

You will send the request via email to e-ratecustomersupport@usac.org. The request must include:

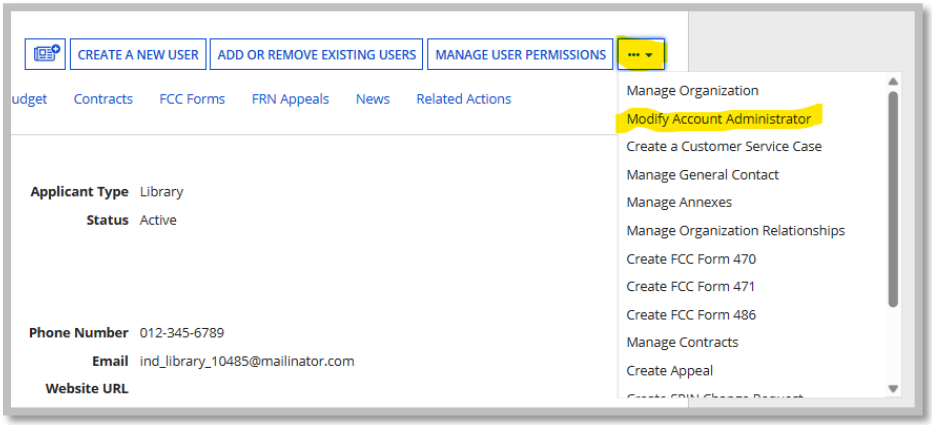
1. Billed entity number
2. Your name
3. Your job title
4. Address
5. Your phone number
6. Your email address
7. If there is already an Account Administrator established for your library, also include a brief statement that the current Account Administrator is absent or no longer with the library.

Upon receipt of the request, USAC will create a new user account and notify you of your next steps.

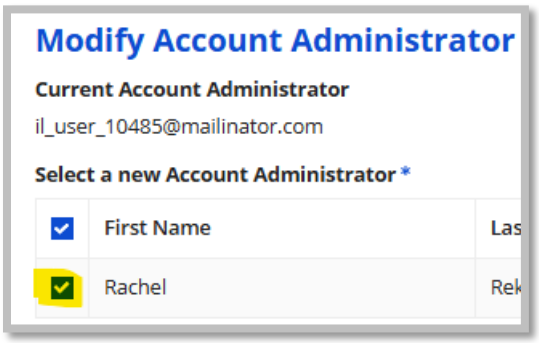
If you have any questions, you can contact USAC Customer Service at 888-203-8100.

1. In EPC, on My Applicant Landing Page, select your library's name where it says **Welcome, [Your Library Name]!**

2. In the top, right corner of the screen, select the drop-down arrow next to the three dots then select **Modify Account Administrator**.



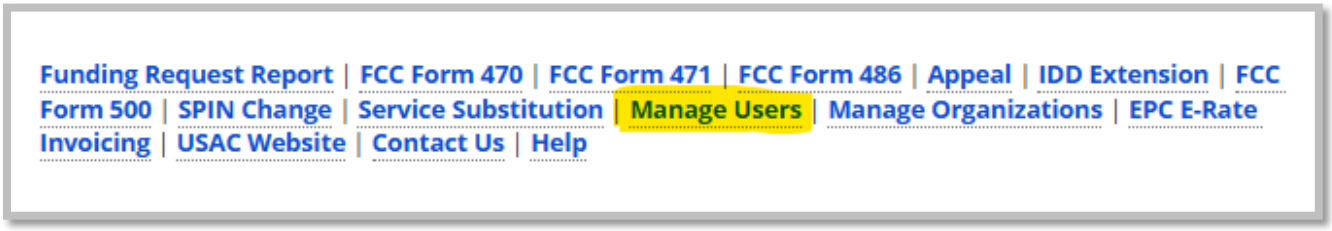
3. Select the box next to the name of the individual who should be the **Account Administrator** and then select **Continue**.



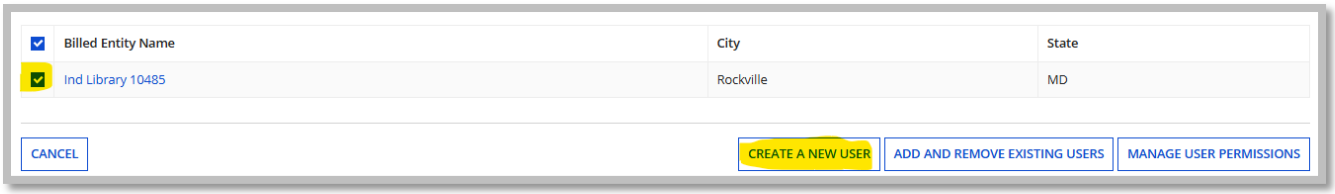
4. Confirm the Account Administrator by selecting **Submit**.

Is there an individual(s) associated with the library that needs to be added as a user? To add a new user, follow the steps below.

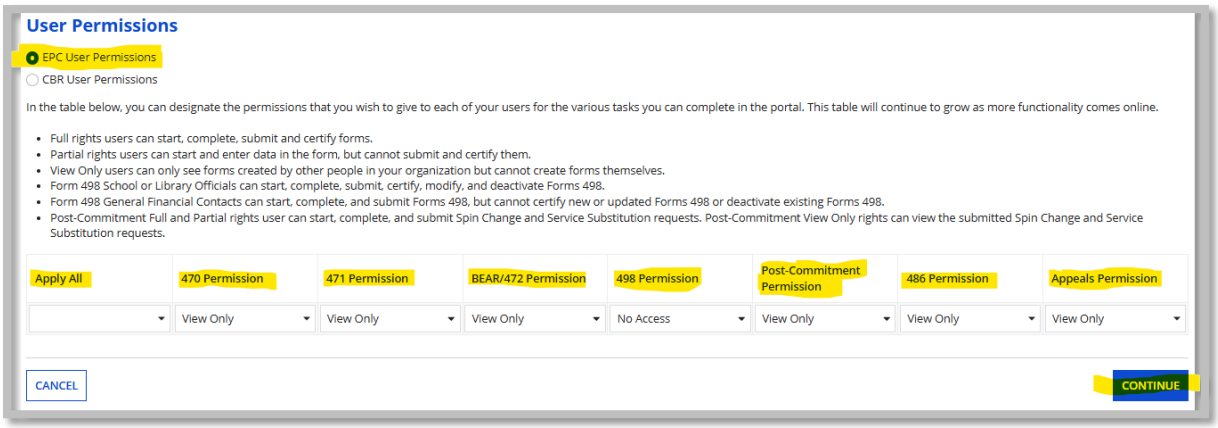
1. In EPC, on My Applicant Landing Page, select **Manage Users** from the menu in the top, right corner of the screen.



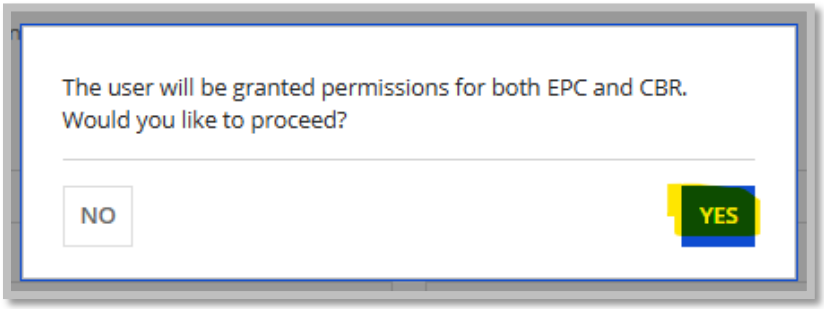
2. Check the box next to the name of your library and select **Create a New User**.



3. Fill in the **User Details**, **Email**, and **Address** information. For **User Permissions**, select **EPC User Permissions**. At the bottom of the page, select the type of permissions you would like the user to have for each area. **Apply All** allows you to apply the same permissions to all categories (except 498 Permission). When finished select **Continue**.

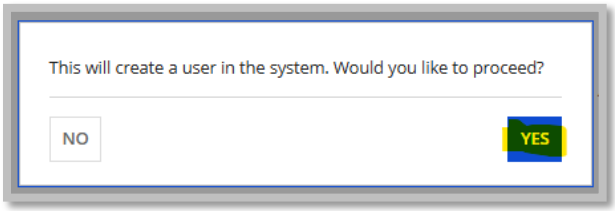


4. Select **Yes**.

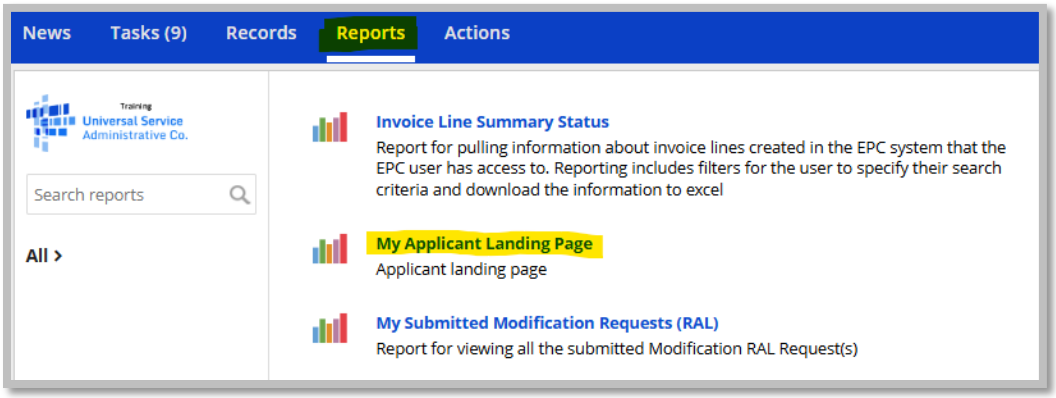


5. Review the information on the **Confirm User Details** page. Select **Previous** if you need to change any information. Select **Submit** to finalize the user creation.

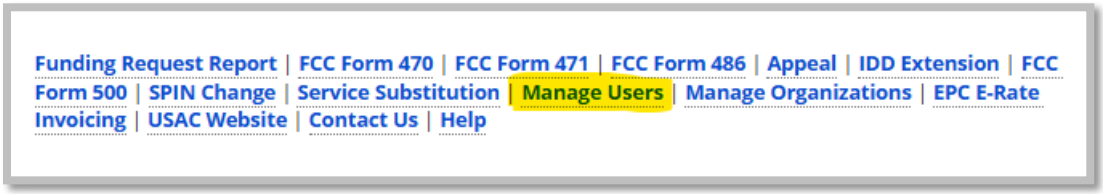
6. Select **Yes.**



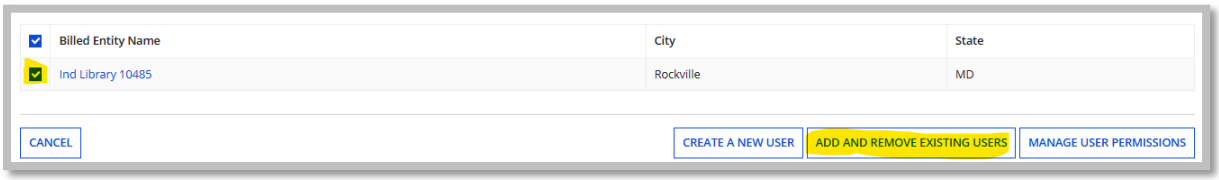
7. To view the new user, go back to My Applicant Landing page. You can do this by clicking the **Universal Service Administrative Co.** logo in the top, left corner of the screen or you can go to **Reports** on the top, blue menu bar and then select **My Applicant Landing Page**.



8. Select **Manage Users** from the menu in the top, right corner of the screen.



9. Check the box next to the name of your library and select **Add and Remove Existing Users**.



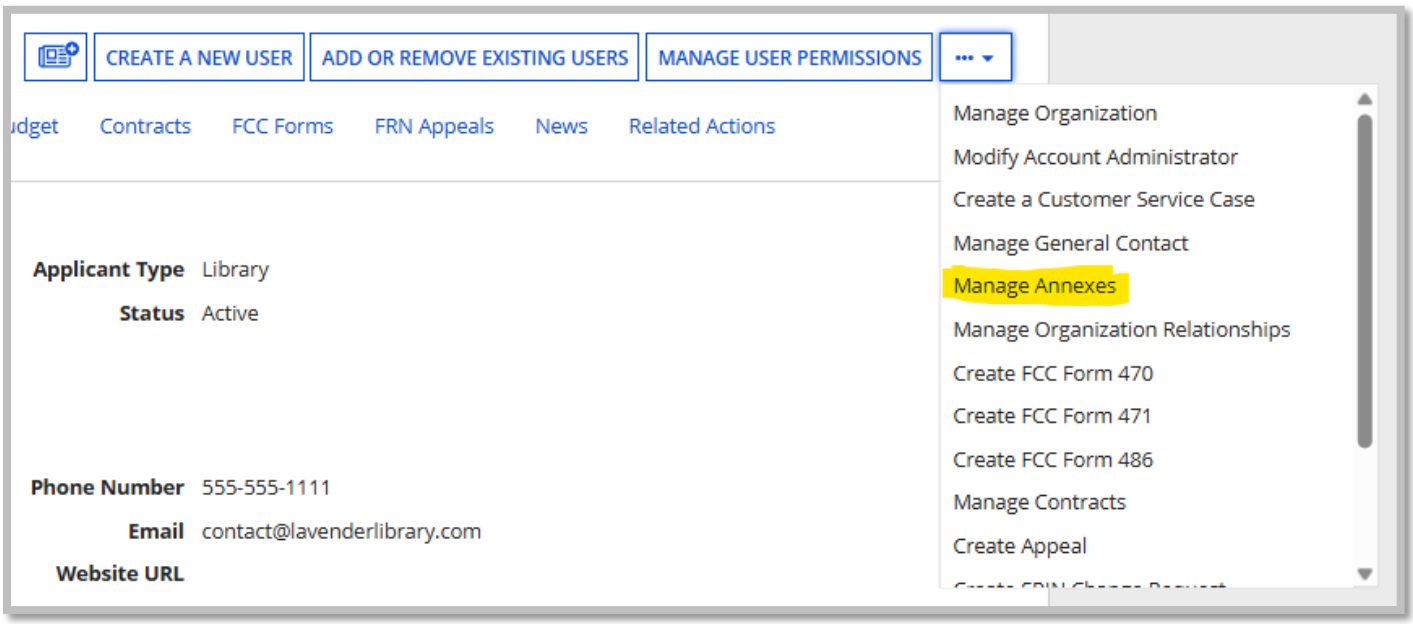
10. Check under **User Permissions** to see if the new user is listed.

Are there any entities associated with the library that need to be added (for example, an annex or a consulting firm)? To add an entity, follow the steps below.

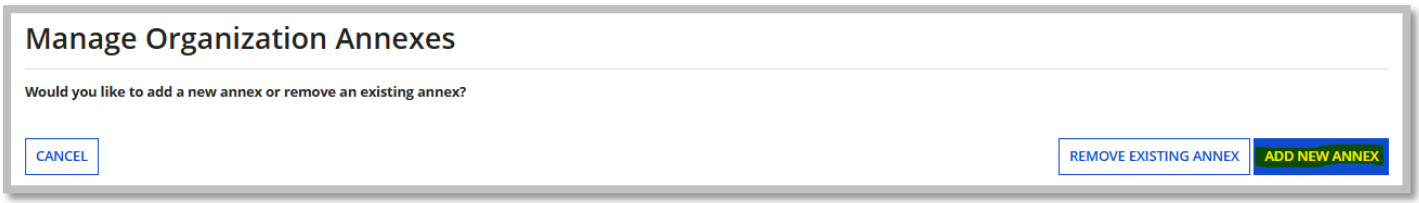
ADDING an ANNEX

1. In EPC, on My Applicant Landing Page, select your library's name where it says **Welcome, [Your Library Name]!**

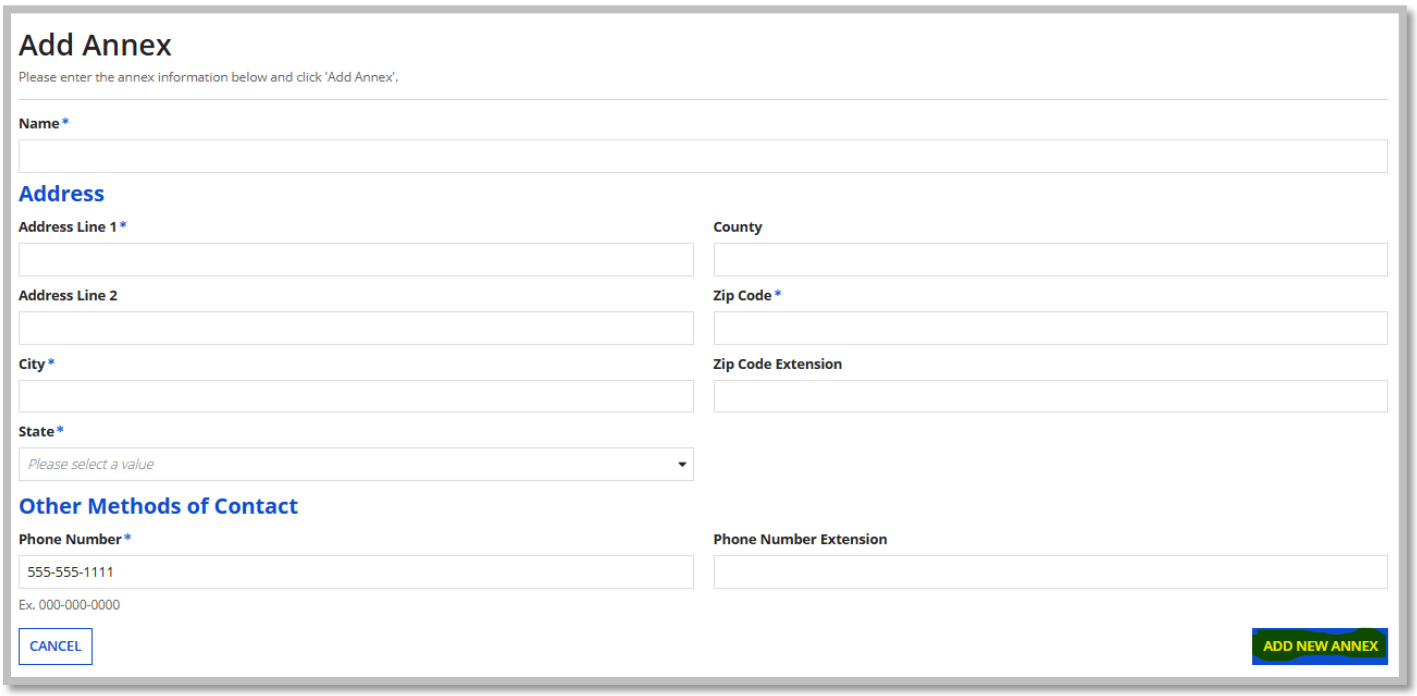
2. In the top, right corner of the screen, select the drop-down arrow next to the three dots then select **Manage Annexes**.



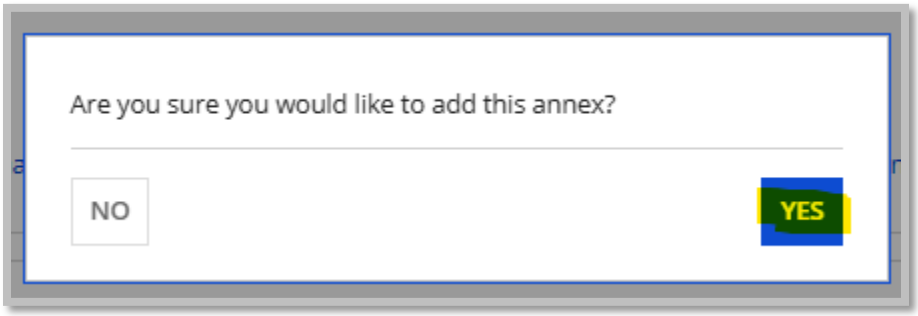
3. Select **Add New Annex**.



4. Enter information about the annex then select **Add New Annex**.



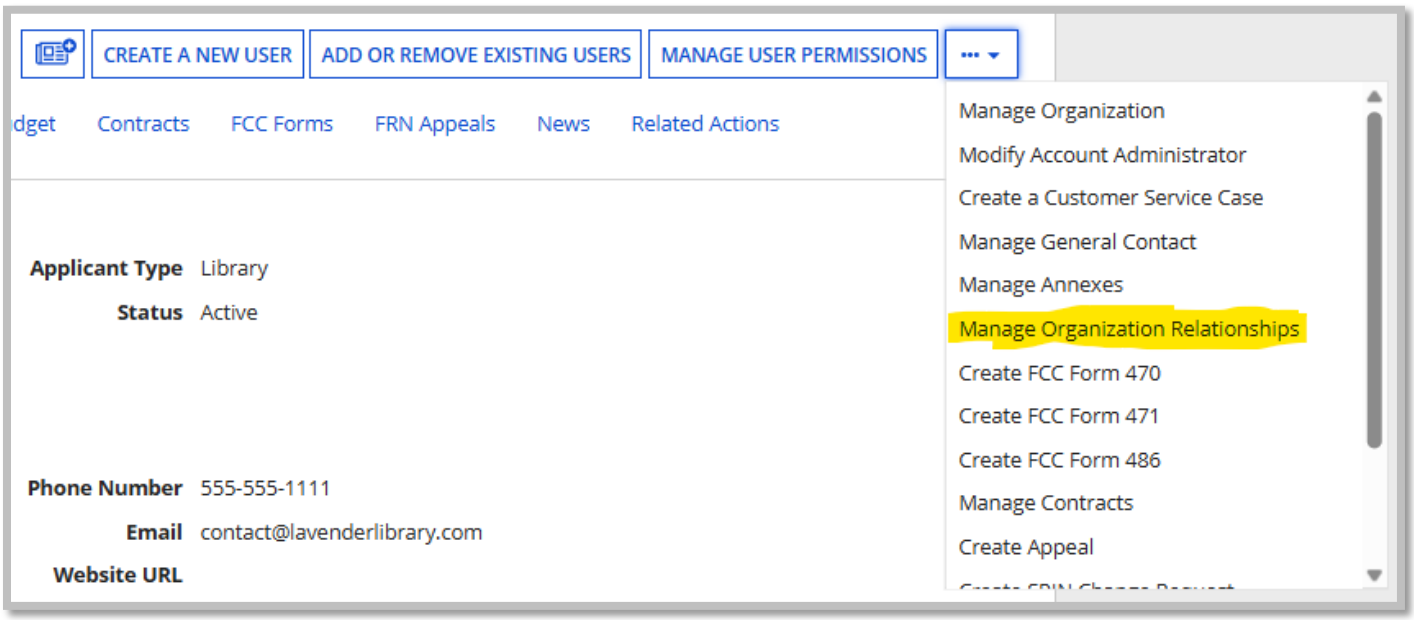
5. Click **Yes**.



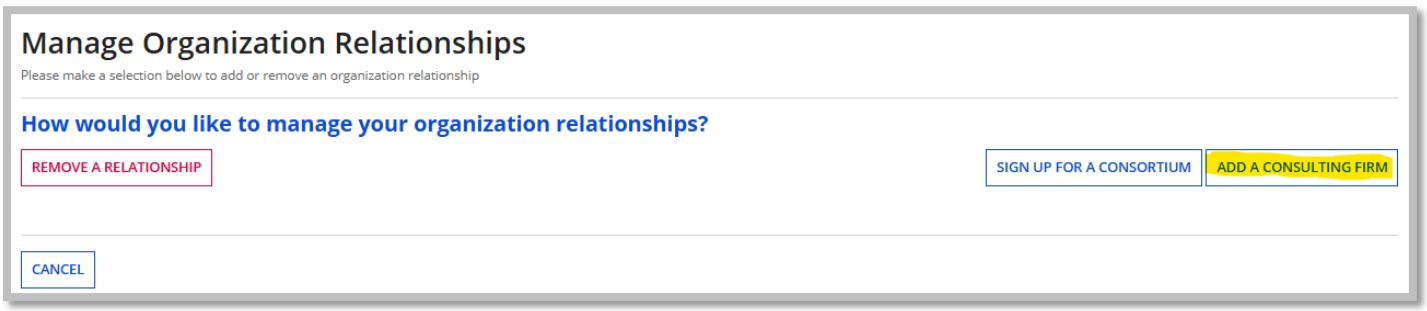
ADDING a CONSULTING FIRM

1. In EPC, on My Applicant Landing Page, select your library's name where it says **Welcome, [Your Library Name]!**

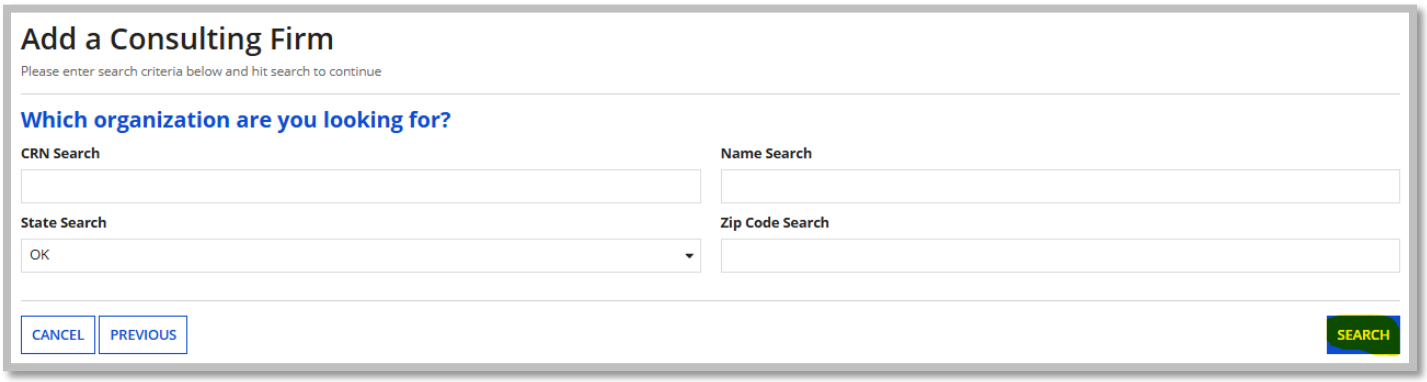
2. In the top, right corner of the screen, select the drop-down arrow next to the three dots then select **Manage Organization Relationships**.



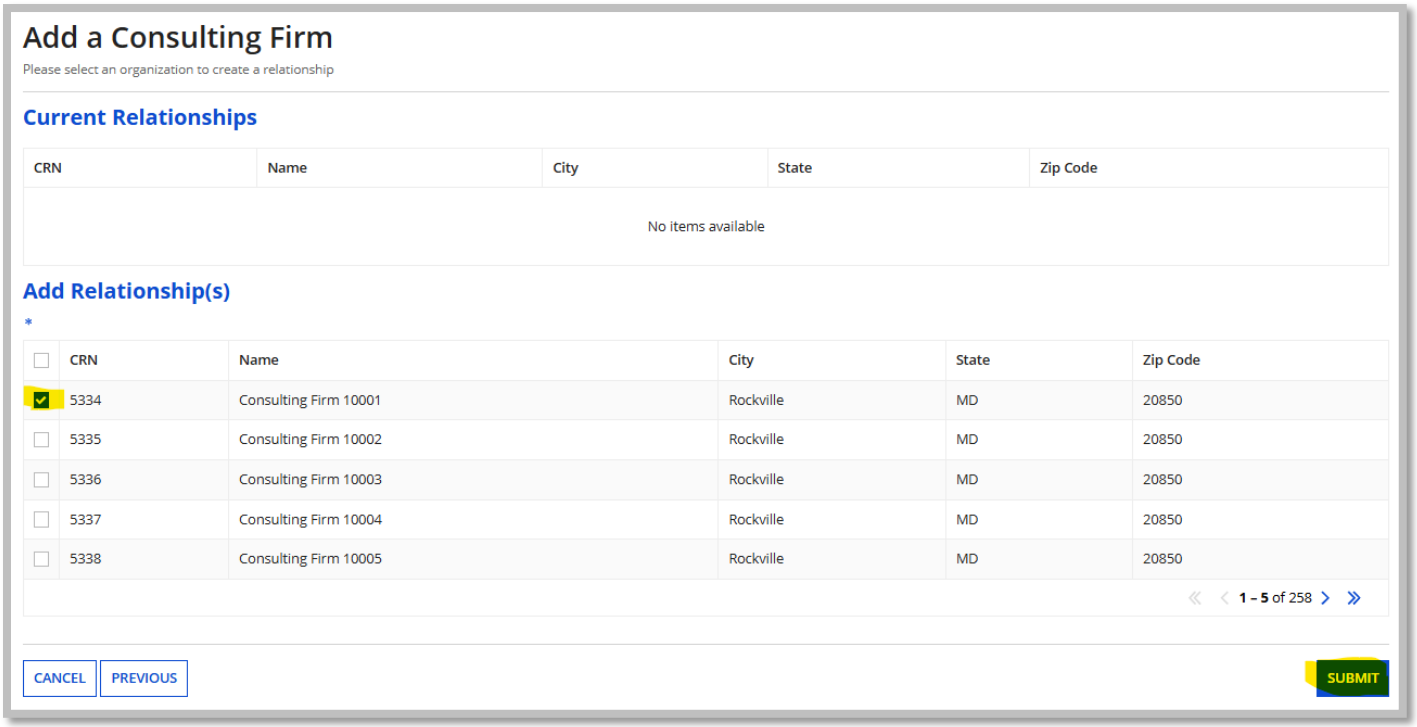
3. Select **Add a Consulting Firm**.



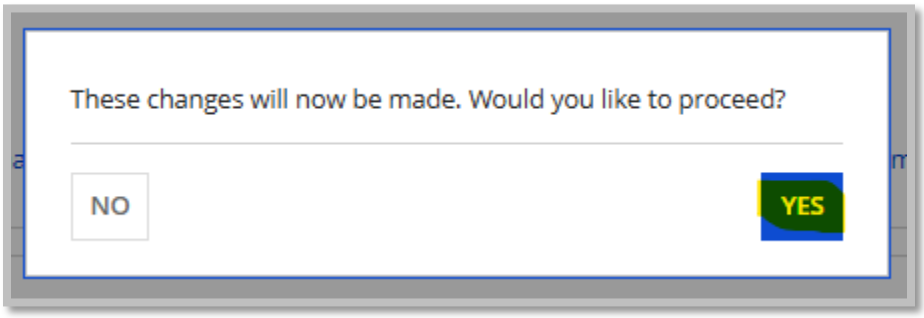
4. Enter the consulting firm information in the search box(es) and click **Search**.



5. Select the consulting firm and then click **Submit**.



6. Select **Yes**.

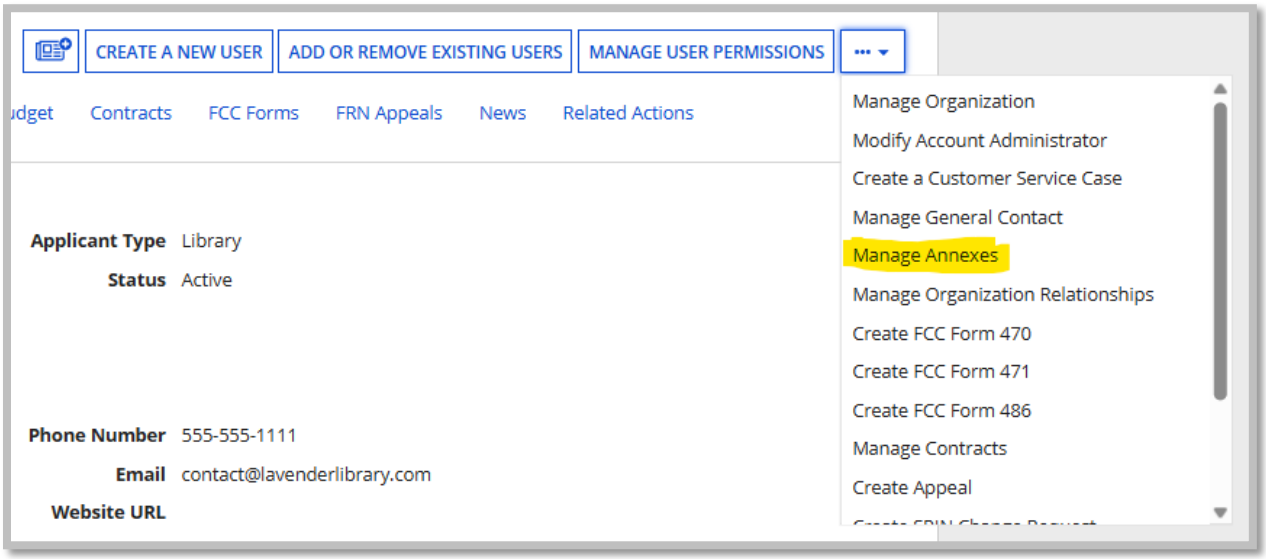


Are there any entities associated with the library that need to be removed? To remove an entity, follow the steps below.

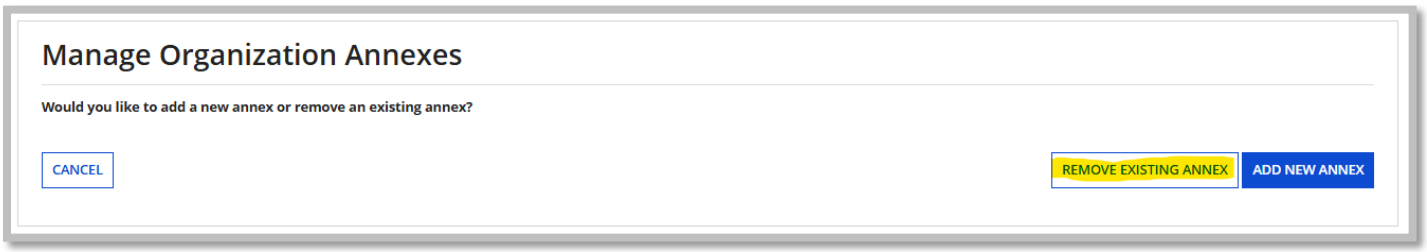
REMOVING an ANNEX

1. In EPC, on My Applicant Landing Page, select your library's name where it says **Welcome, [Your Library Name]!**

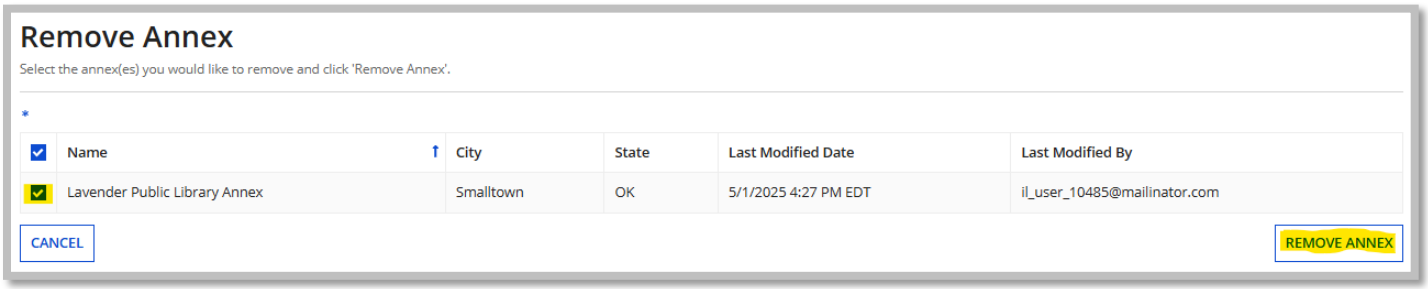
2. In the top, right corner of the screen, select the drop-down arrow next to the three dots then select **Manage Annexes**.



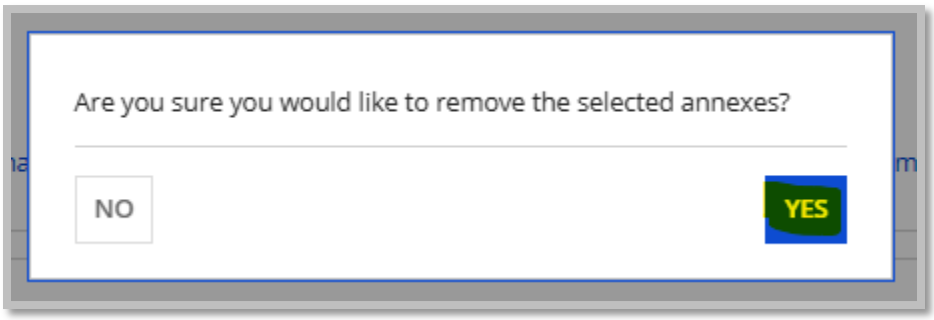
3. Select **Remove Existing Annex.**



4. Select the annex to be removed then click **Remove Annex**.



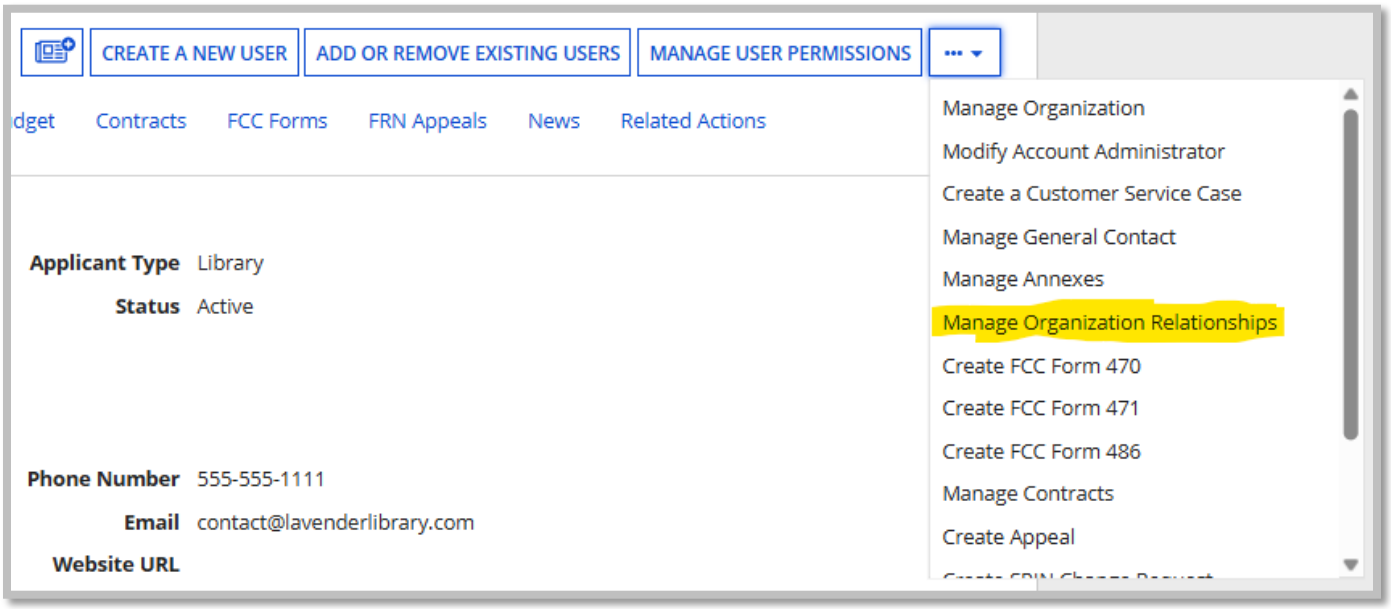
5. Select **Yes**.



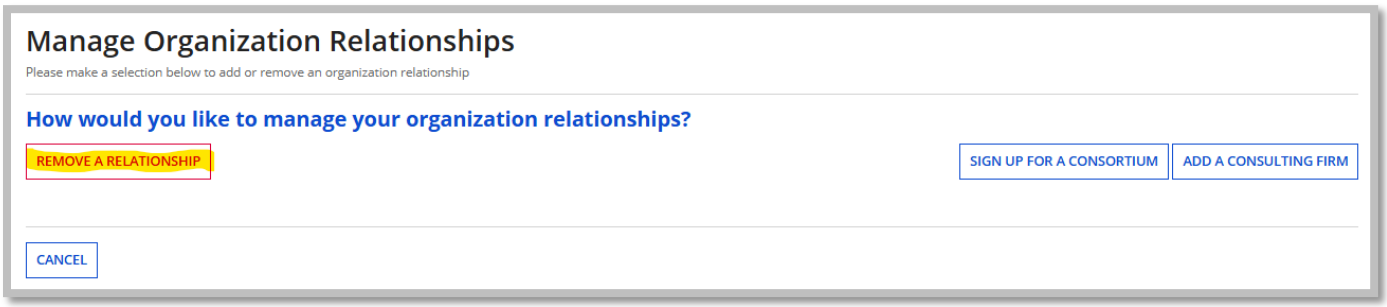
REMOVING a CONSULTING FIRM

1. In EPC, on My Applicant Landing Page, select your library's name where it says **Welcome, [Your Library Name]!**

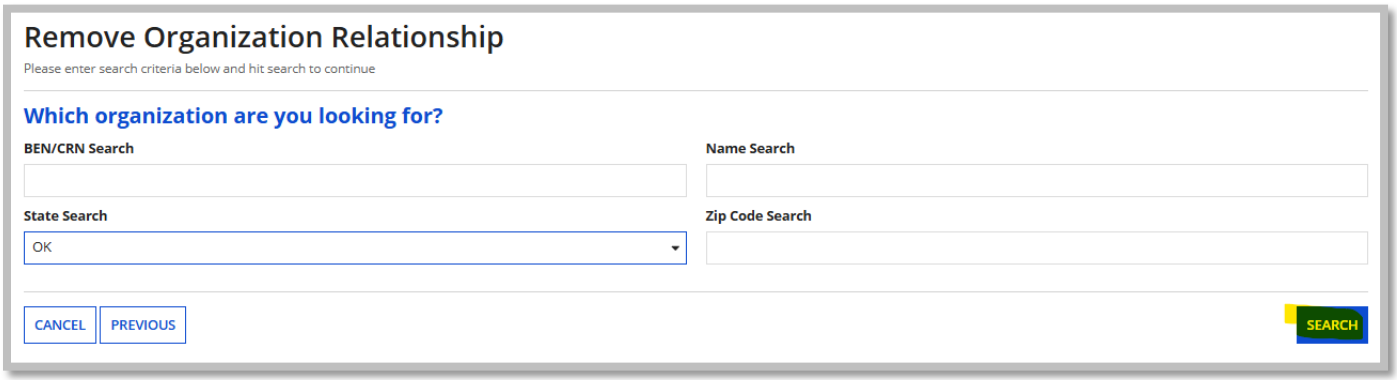
2. In the top, right corner of the screen, select the drop-down arrow next to the three dots then select **Manage Organization Relationships**.



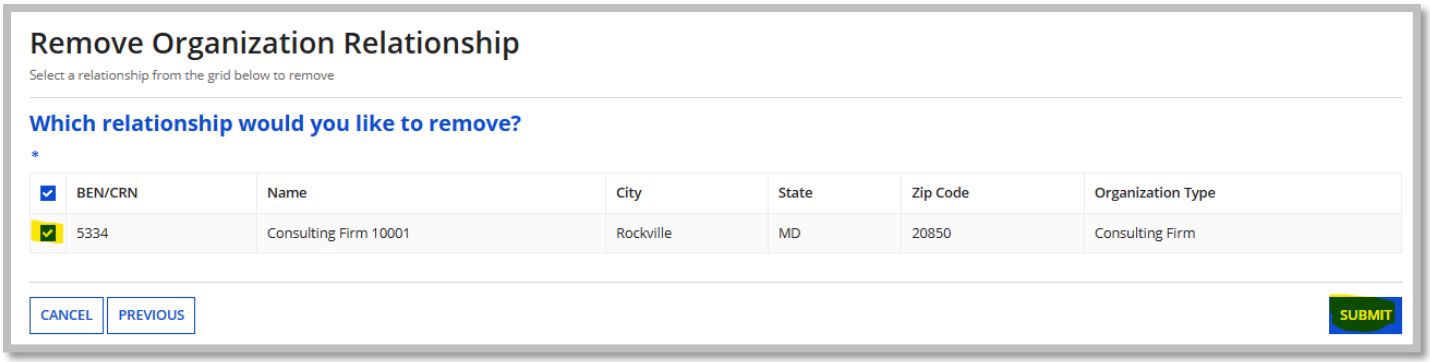
3. Select **Remove a Relationship**.



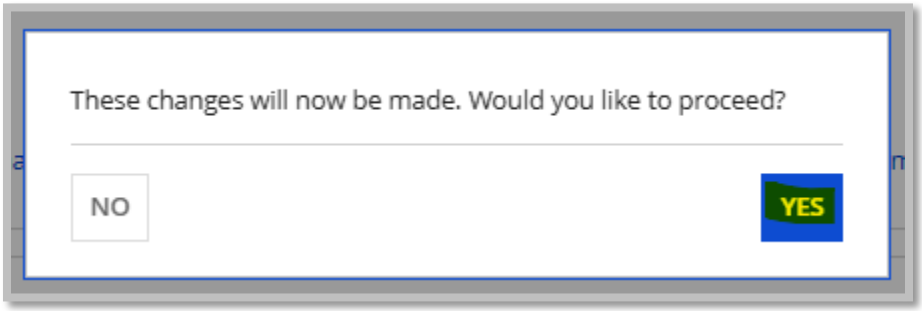
4. Enter the consulting firm information in the search box(es) and click **Search**.



5. Select the consulting firm then click **Submit**.



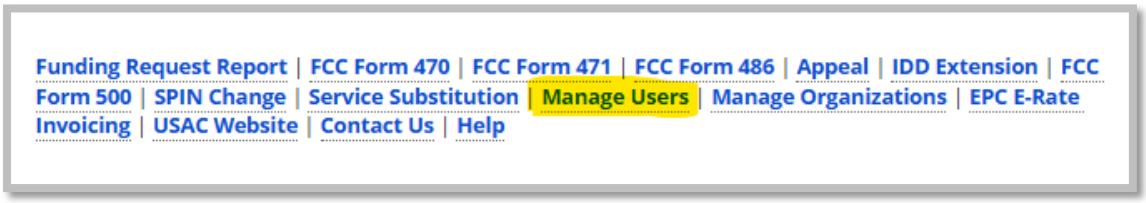
6. Select **Yes**.



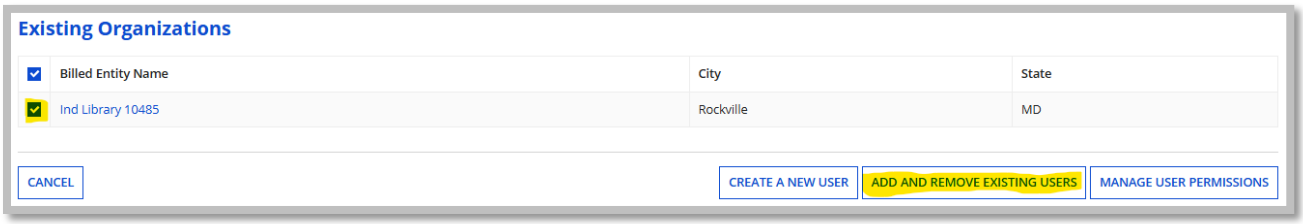
Is there an individual(s) no longer with the library that needs to be removed from the list of users? To remove a user, follow the steps below.

OPTION 1

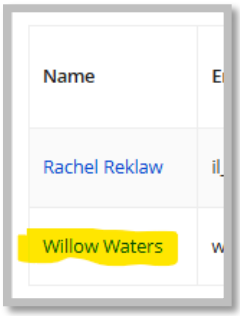
1. In EPC, on My Applicant Landing Page, select **Manage Users** from the menu in the top, right corner of the screen.



2. Check the box next to the name of your library and select **Add and Remove Existing Users**.

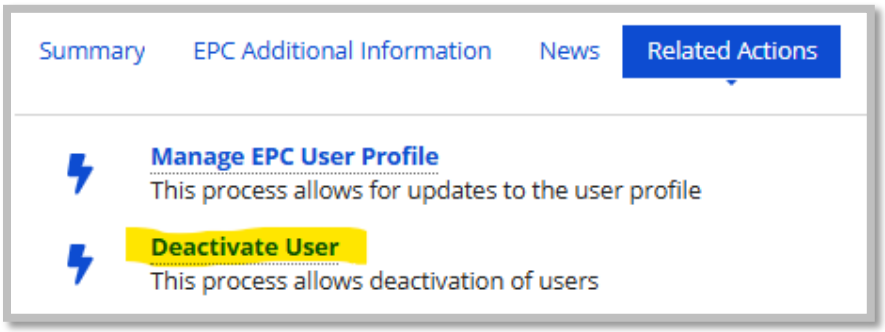


3. Click on the **Name** of the user you would like to remove.

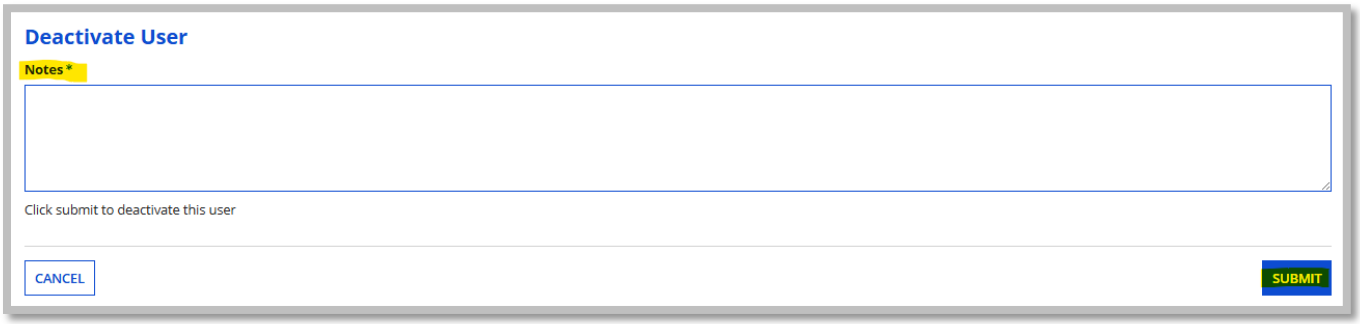


4. This opens up the user's EPC User Profile. On the menu bar, select **Related Actions**.

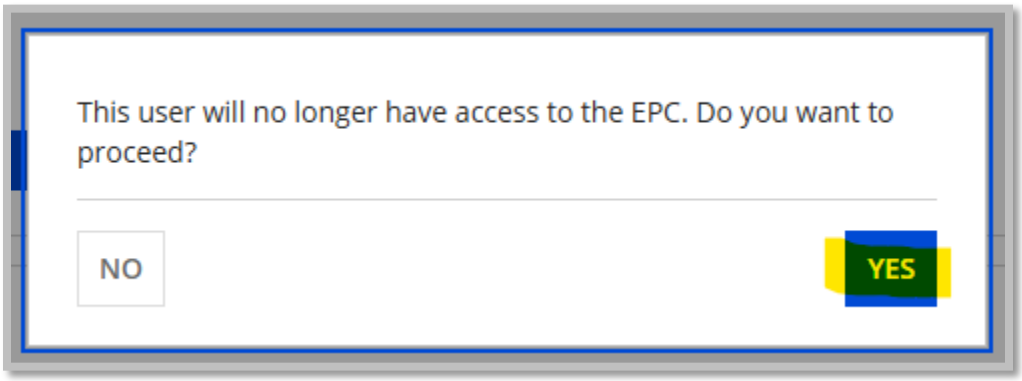
5. Select **Deactivate User**.



6. Add a **Note** such as "User no longer works at the [YOUR LIBRARY NAME]" then click **Submit**.

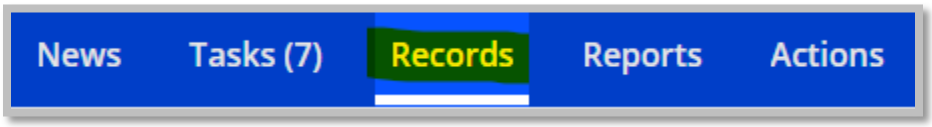


7. Select **Yes**.

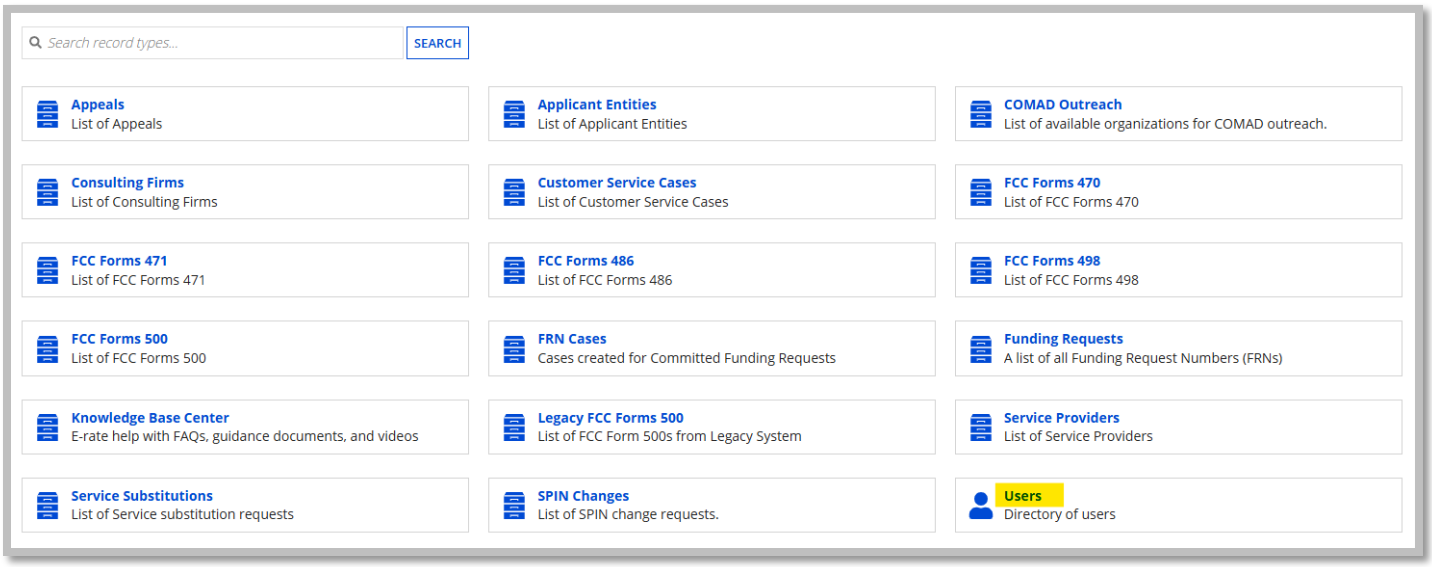


OPTION 2

1. In EPC, on My Applicant Landing Page, select **Records** on the top, blue menu bar.

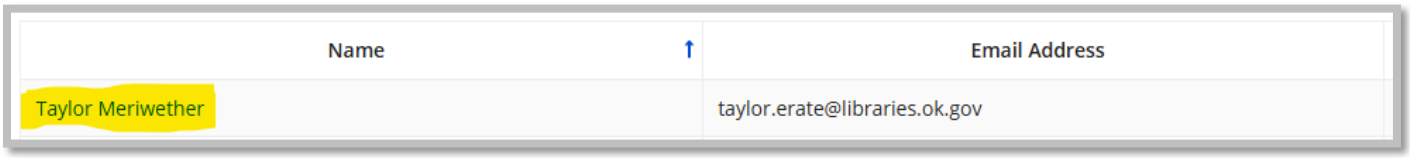


2. Select **Users** in the bottom, right corner.

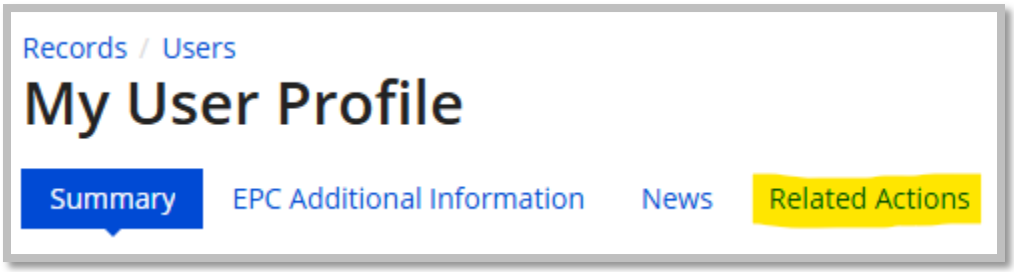


3. Enter the **first name and last name** of the person you're searching, and select **Search**.

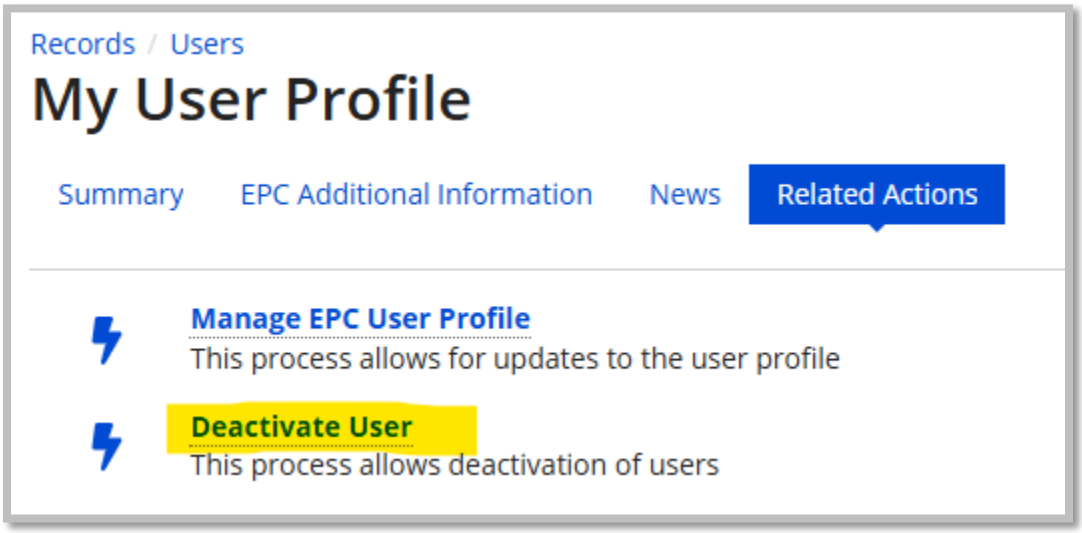
4. Select the **Name**.



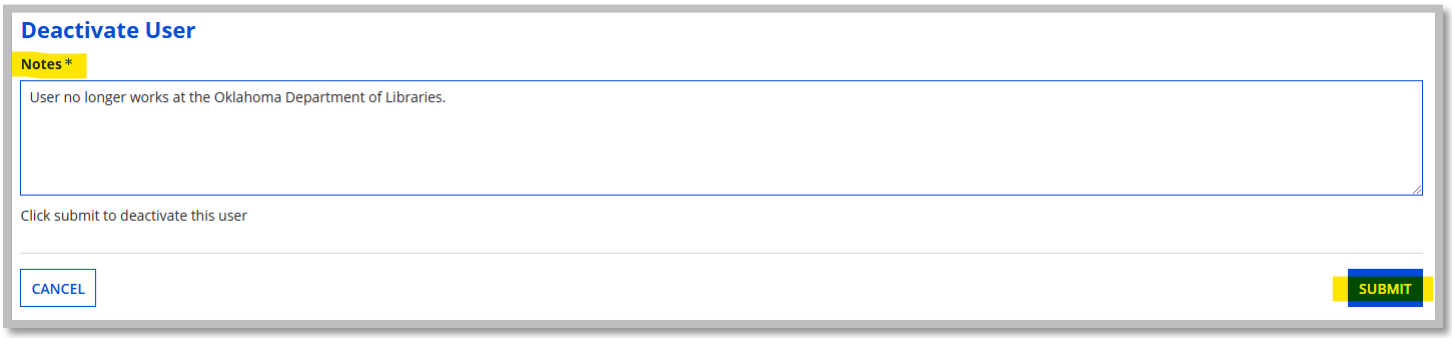
5. Select **Related Actions**.



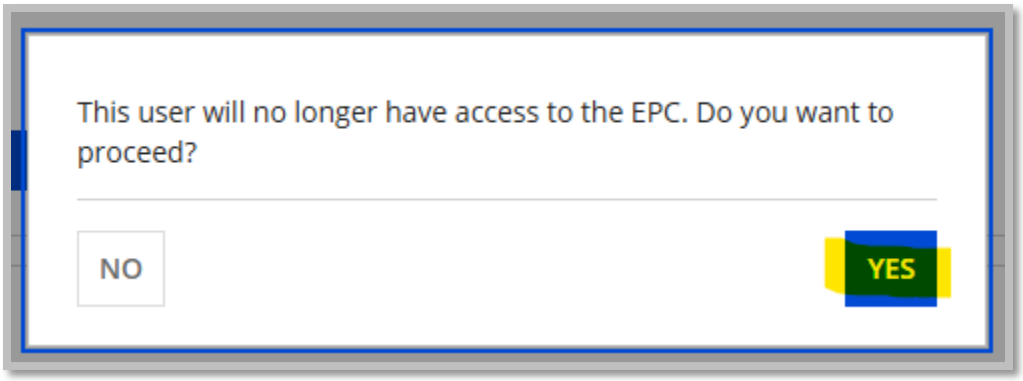
6. Select **Deactivate User**.



7. Enter a **Note** such as “User no longer works at the Oklahoma Department of Libraries” then click **Submit.**

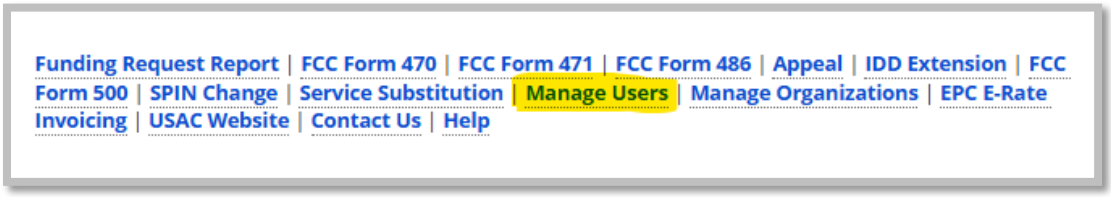


8. Select **Yes**.

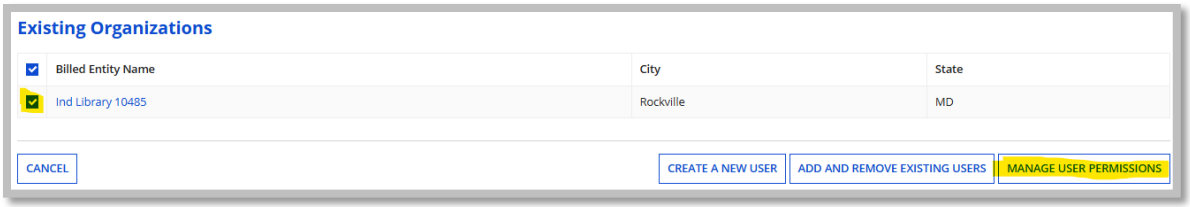


Do any user permissions need to be updated? To check this, follow the steps below.

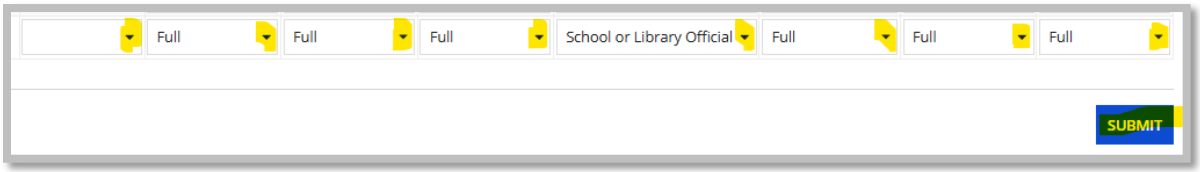
1. In EPC, on My Applicant Landing Page, select **Manage Users** from the menu in the top, right corner of the screen.



2. Check the box next to the name of your library and select **Manage User Permissions**.



3. From the Manage User Permissions page, use the drop-down menus for each user to manage permissions. Note: The first column, **Apply All**, allows you to apply the same permissions to all categories (except 498 Permission). Once you have made changes, click **Submit**.



4. Here is information from a USAC presentation about the user rights levels:

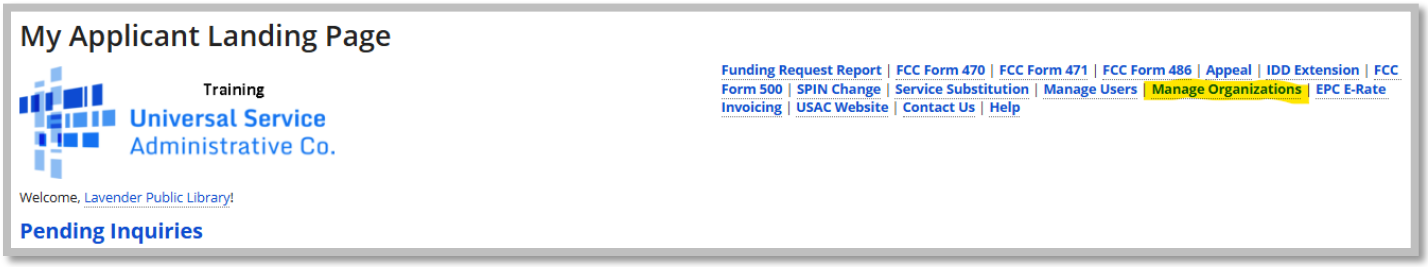
User "Rights" Levels

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

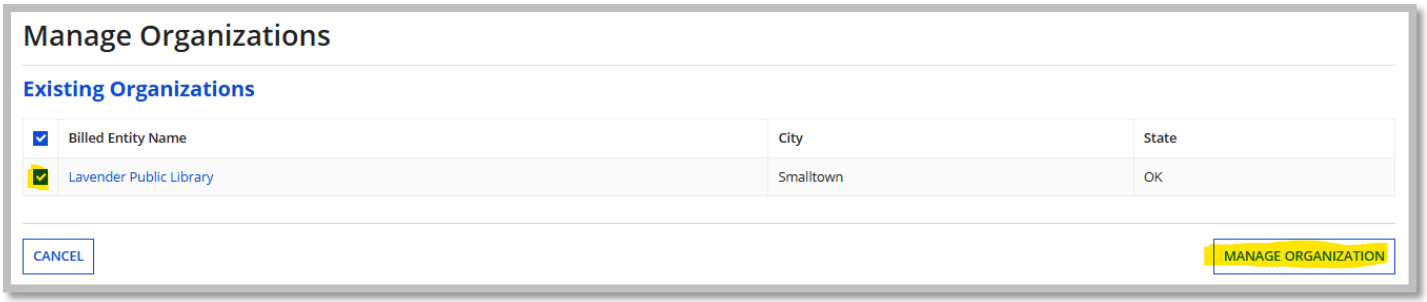
- A "Full-Rights" user **can complete and certify forms on behalf of the BEN**, update profile information, and receive all USAC communications regarding the BEN.
  - For example, you may determine that a **school or library official** should have this access level
- "Partial-Rights" user can **create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

Does the library's square footage need to be updated? To do this, follow the steps below.

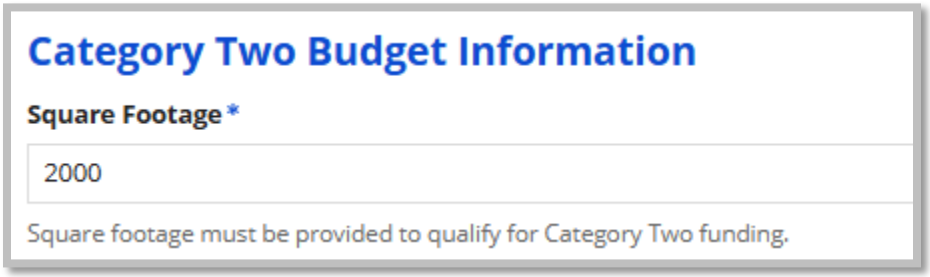
1. In EPC, on My Applicant Landing Page, select **Manage Organizations** in the top, right corner of the screen.



2. Select the library and then click **Manage Organization**.

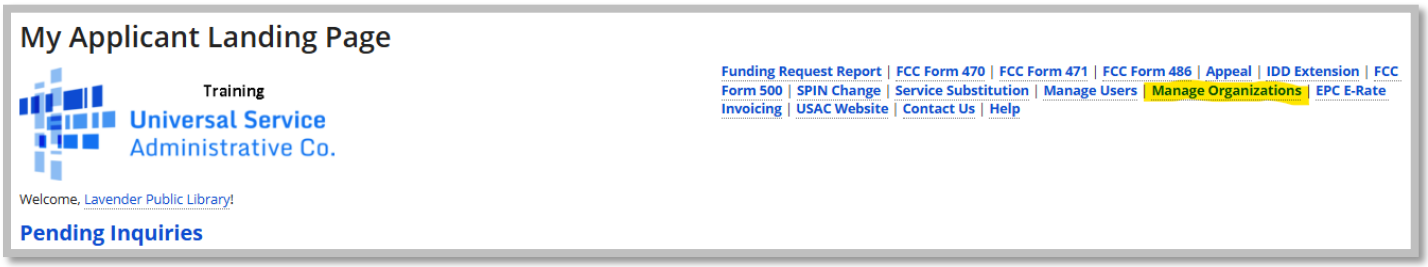


3. Scroll down the page to the **Square Footage** box. Update the information in the box then click **Submit**.

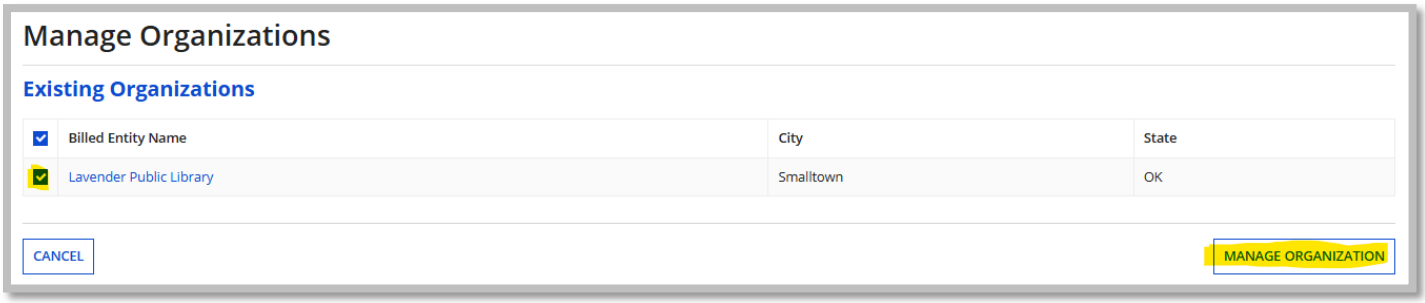


Does the library's tribal status need to be updated? NOTE: Only libraries that have a letter from a tribe can be listed as a Tribal Library. To make updates, follow the steps below.

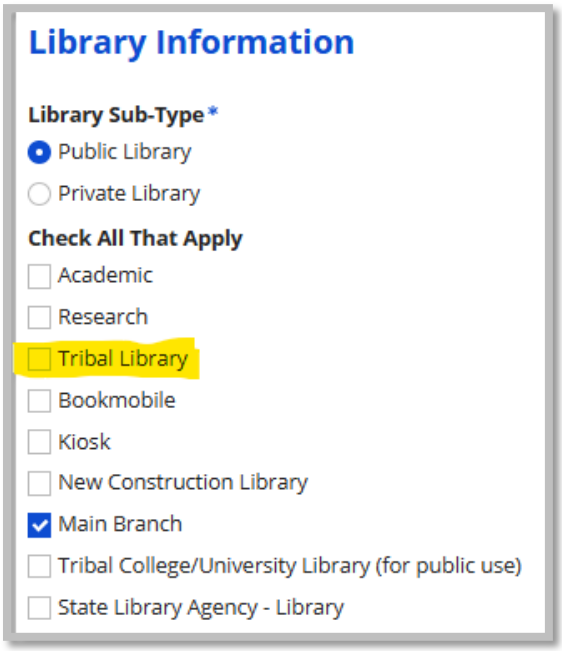
1. In EPC, on My Applicant Landing Page, select **Manage Organizations** in the top, right corner of the screen.



2. Select the library and then click **Manage Organization**.

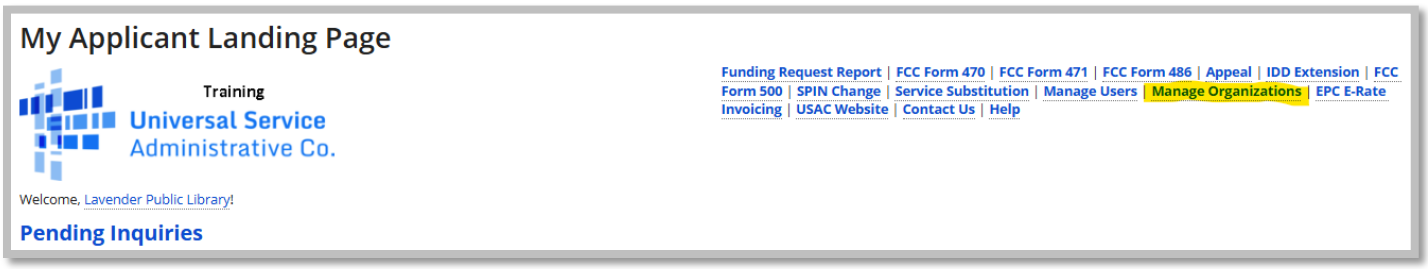


3. Scroll down the page to the **Library Information** section. If **Tribal Library** is selected and your library is not a tribal library, remove the checkmark. If your library is a tribal library (you have a letter from a tribe), select **Tribal Library**. Once changes are made, click **Submit**.

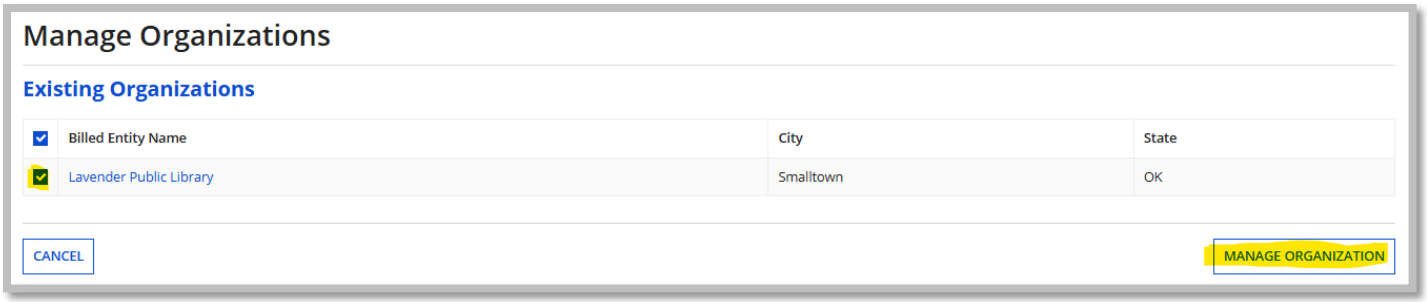


Are the library's contact information and address correct? To check this, follow the steps below.

1. In EPC, on My Applicant Landing Page, select **Manage Organizations** in the top, right corner of the screen.



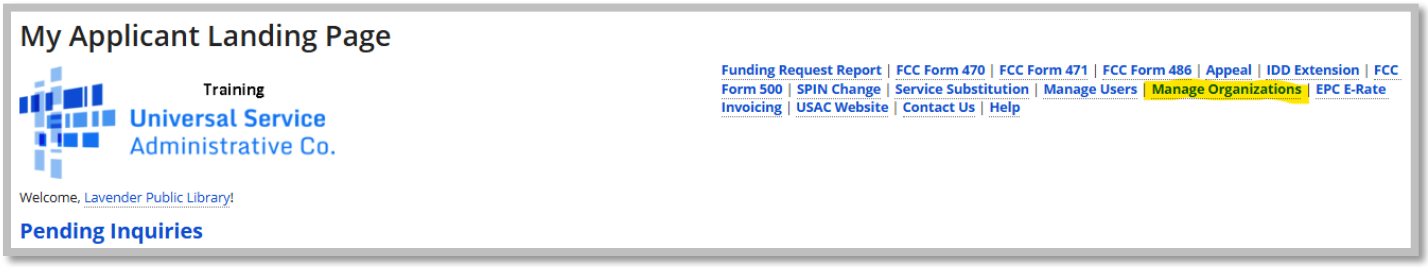
2. Select the library and then click **Manage Organization**.



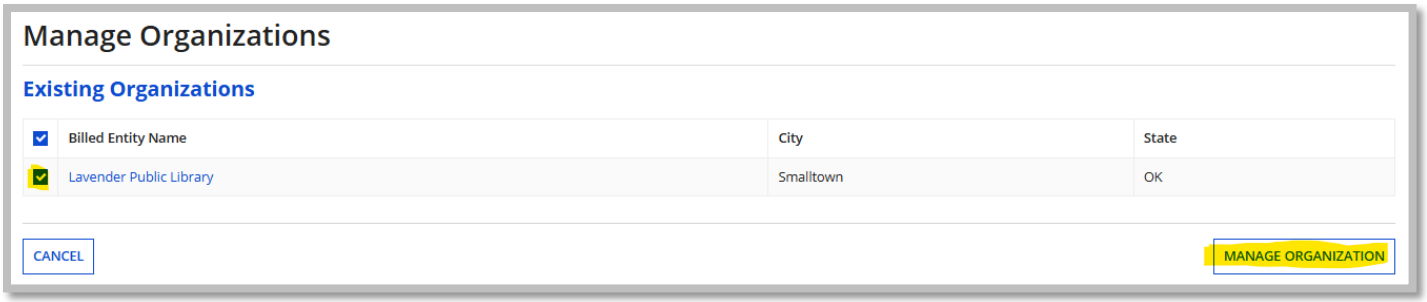
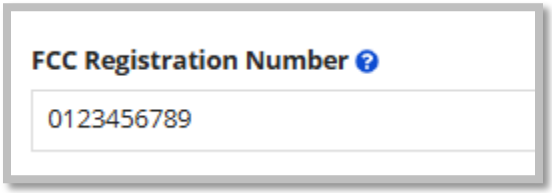
3. Scroll through the page and make sure the physical address, phone number, email, and other information are correct. Update the information as needed then click **Submit**.

Is the library's FCC Registration Number (FCC RN) correct? To check this, follow the steps below:

1. In EPC, on My Applicant Landing Page, select **Manage Organizations** in the top, right corner of the screen.



2. Select the library and then click **Manage Organization**.



3. Scroll down the page to the **FCC Registration Number** box. If this information needs to be updated, enter the correct information in the box then click **Submit**.