Administrative Window Checklist

✔	QUESTION	INSTRUCTIONS
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	Does the library's square footage need to be updated?	Page 17
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	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**.
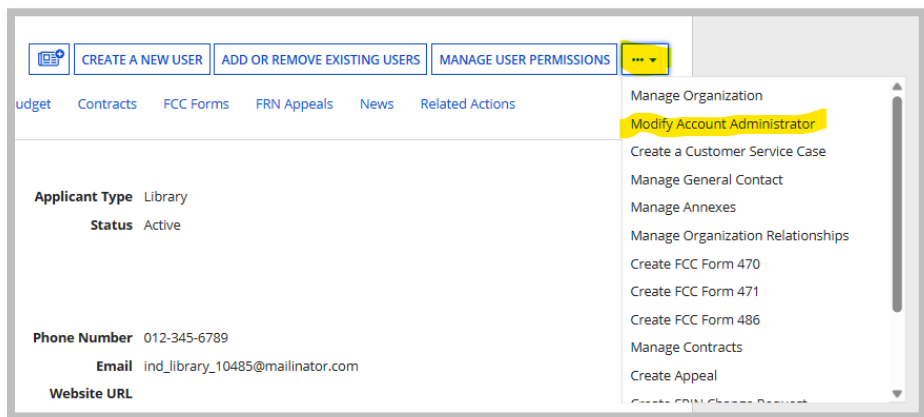
3. Select the box next to the name of the individual who should be the **Account Administrator** and then select **Continue**.

Modify Account Administrator

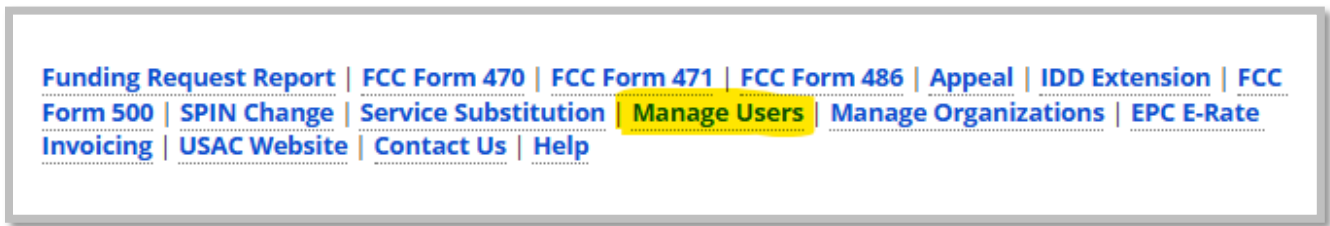**Current Account Administrator**

il_user_10485@mailinator.com

Select a new Account Administrator *

☑	First Name	Las
☑	Rachel	Rek

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.

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help

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

☑	Billed Entity Name	City	State
☑	Ind Library 10485	Rockville	MD

CANCEL   CREATE A NEW USER | ADD AND REMOVE EXISTING USERS | MANAGE USER PERMISSIONS

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**.

User Permissions

◉ EPC User Permissions
◯ CBR 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.
- 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.

Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
▼	View Only ▼	View Only ▼	View Only ▼	No Access ▼	View Only ▼	View Only ▼	View Only ▼

CANCEL   CONTINUE

4. Select **Yes**.
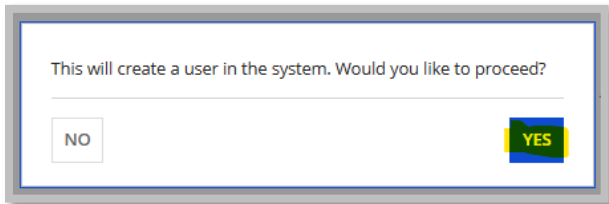
The user will be granted permissions for both EPC and CBR. Would you like to proceed?

NO   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.
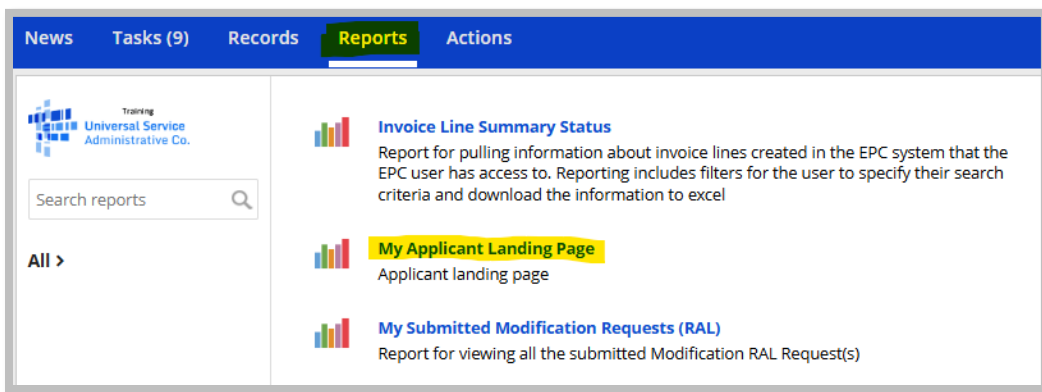
PREVIOUS	CANCEL		SUBMIT

6. Select **Yes.**
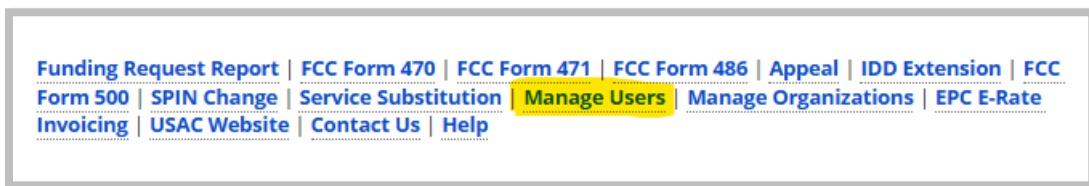
This will create a user in the system. Would you like to proceed?

NO	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**.
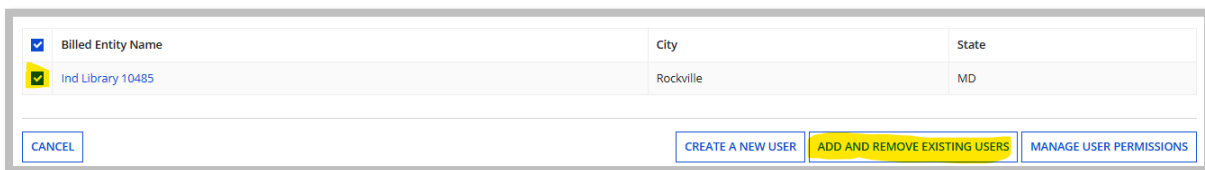
News	Tasks (9)	Records	**Reports**	Actions

Training
Universal Service
Administrative Co.

Search reports

All >

Invoice Line Summary Status
Report for pulling information about invoice lines created in the EPC system that the EPC user has access to. Reporting includes filters for the user to specify their search criteria and download the information to excel

My Applicant Landing Page
Applicant landing page

My Submitted Modification Requests (RAL)
Report for viewing all the submitted Modification RAL Request(s)

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

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help

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

	Billed Entity Name	City	State
☑	Ind Library 10485	Rockville	MD

CANCEL		CREATE A NEW USER	ADD AND REMOVE EXISTING USERS	MANAGE USER PERMISSIONS

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.
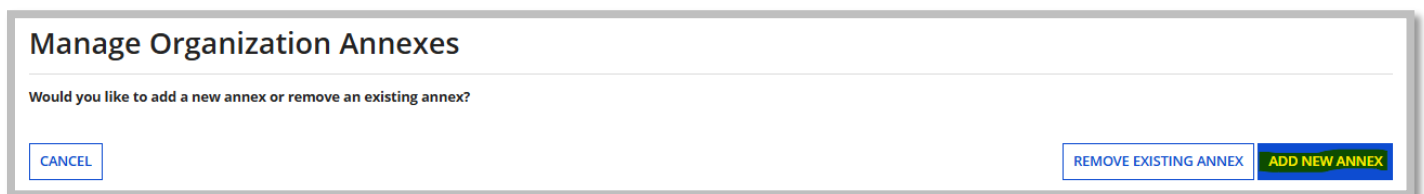
ADDING an ANNEX

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**.
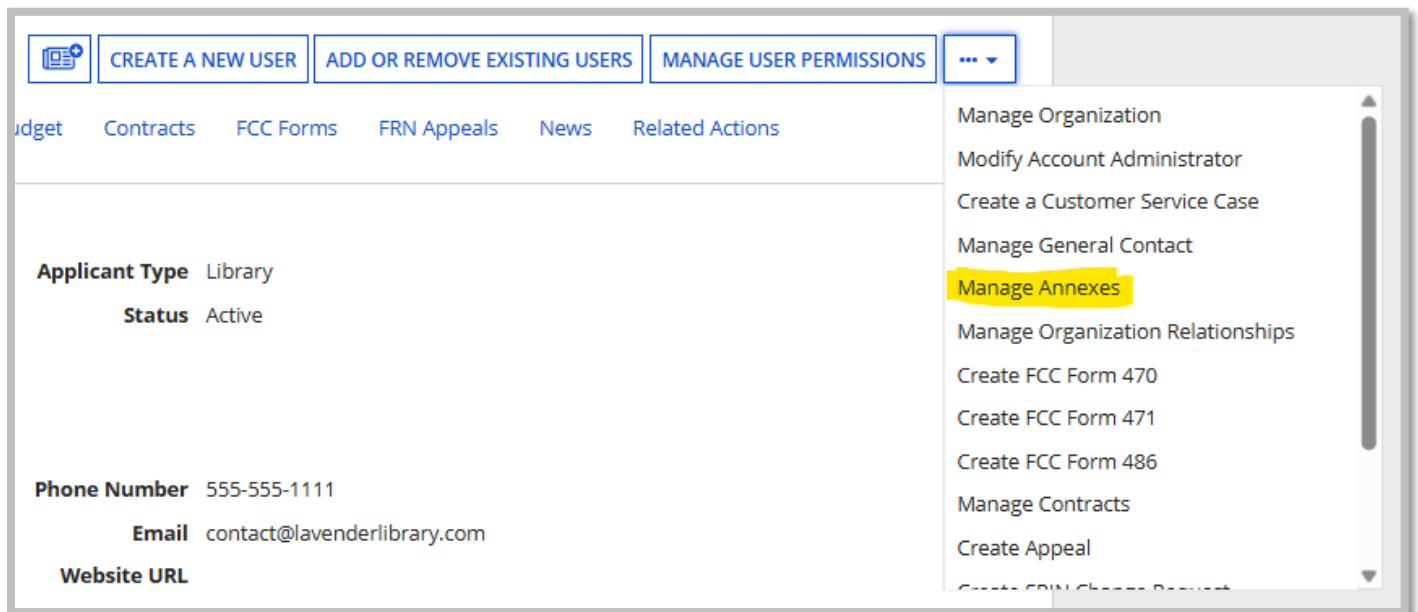
3. Select **Add New Annex**.

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

Add Annex

Please enter the annex information below and click 'Add Annex'.

Name*

Address

Address Line 1*   County

Address Line 2   **Zip Code***

City*   **Zip Code Extension**

State*

Please select a value   ▼

Other Methods of Contact

Phone Number*   **Phone Number Extension**

555-555-1111

Ex. 000-000-0000

CANCEL   ADD NEW ANNEX

5. Click **Yes**.

Are you sure you would like to add this annex?

NO   YES
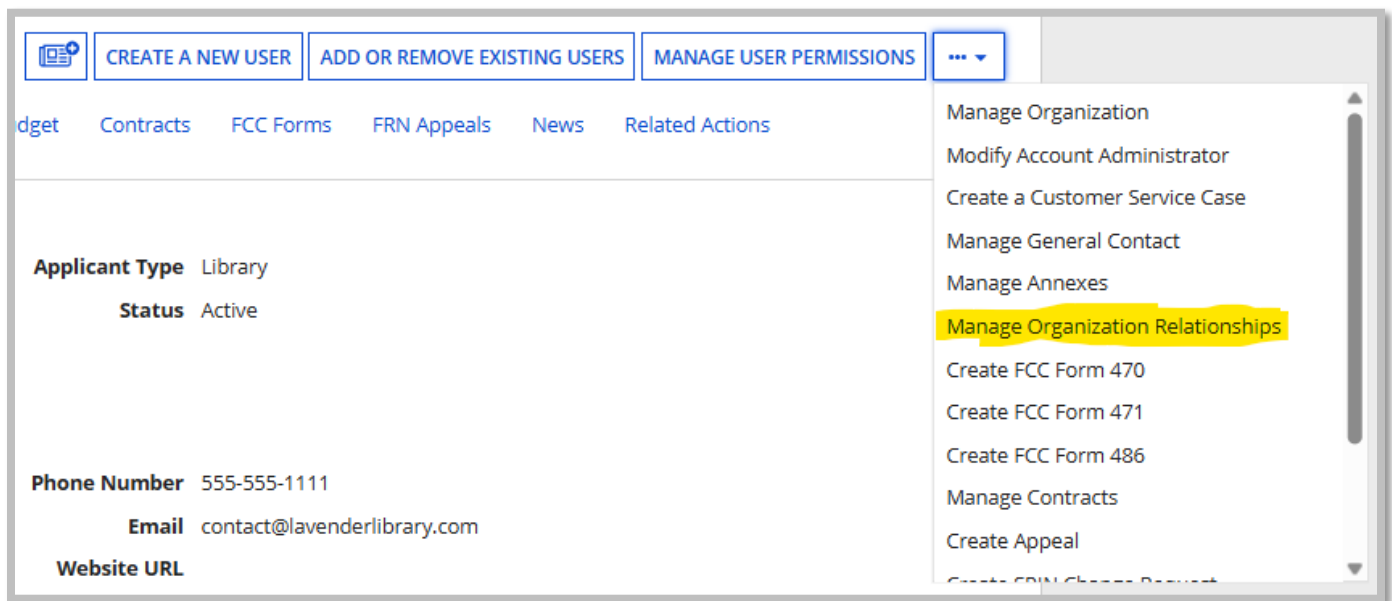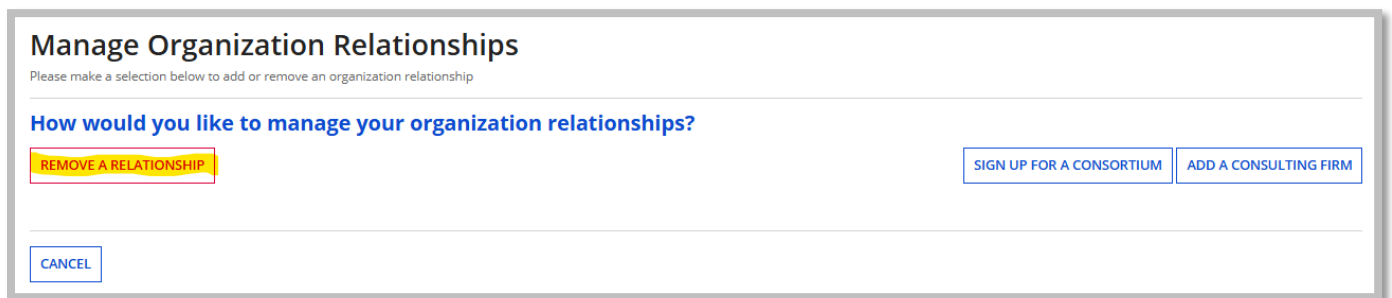
ADDING a CONSULTING FIRM

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**.
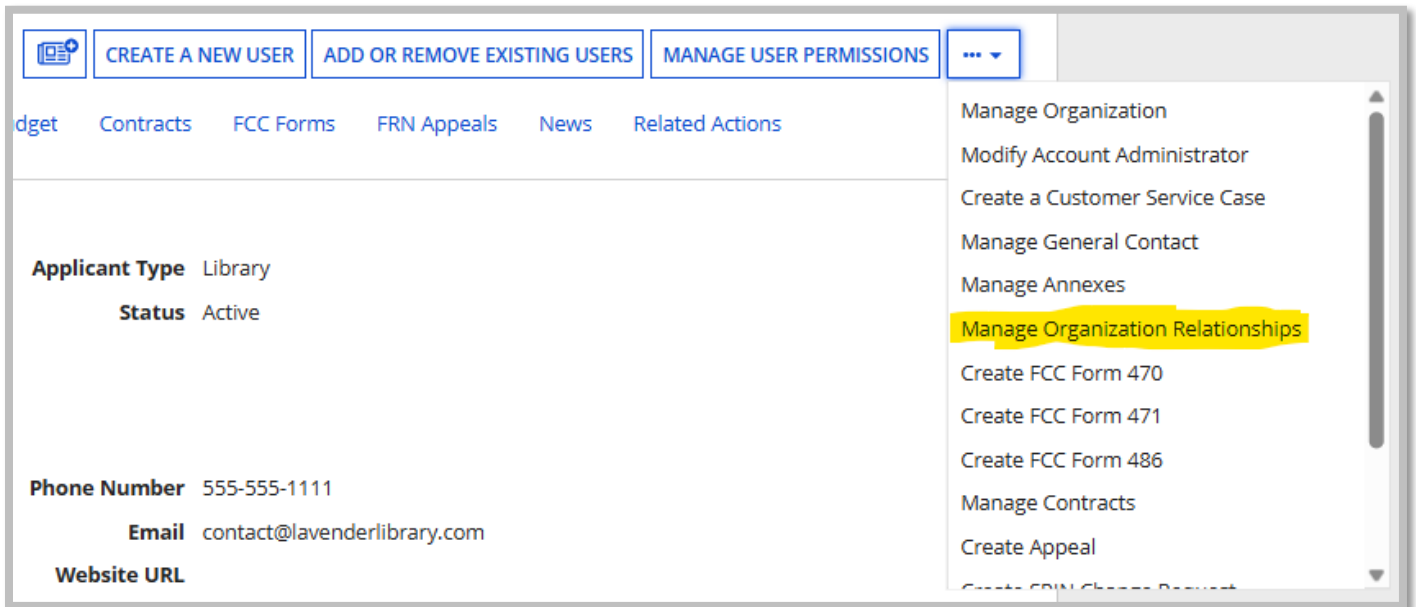
3. Select **Add a Consulting Firm**.
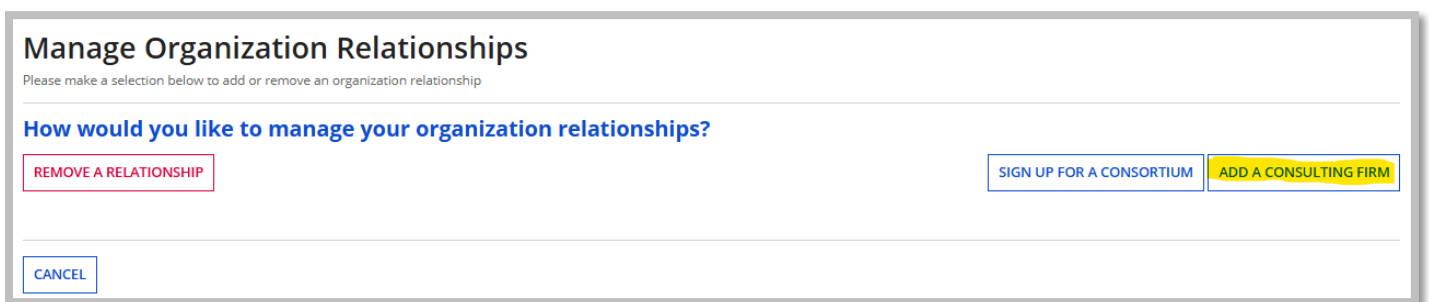
4. Enter the consulting firm information in the search box(es) and click **Search**.

Add a Consulting Firm
Please enter search criteria below and hit search to continue

Which organization are you looking for?

CRN Search	Name Search

State Search	Zip Code Search
OK ▼	

CANCEL PREVIOUS   SEARCH

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

Add a Consulting Firm
Please select an organization to create a relationship

Current Relationships

CRN	Name	City	State	Zip Code
No items available				

Add Relationship(s)
*

	CRN	Name	City	State	Zip Code
☑	5334	Consulting Firm 10001	Rockville	MD	20850
☐	5335	Consulting Firm 10002	Rockville	MD	20850
☐	5336	Consulting Firm 10003	Rockville	MD	20850
☐	5337	Consulting Firm 10004	Rockville	MD	20850
☐	5338	Consulting Firm 10005	Rockville	MD	20850

≪ ‹ **1 – 5** of 258 › ≫

CANCEL PREVIOUS   SUBMIT

6. Select **Yes**.

These changes will now be made. Would you like to proceed?
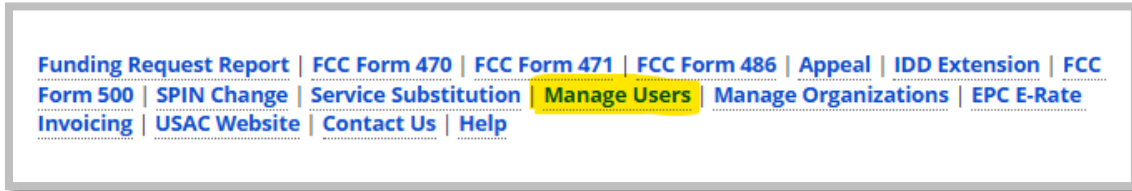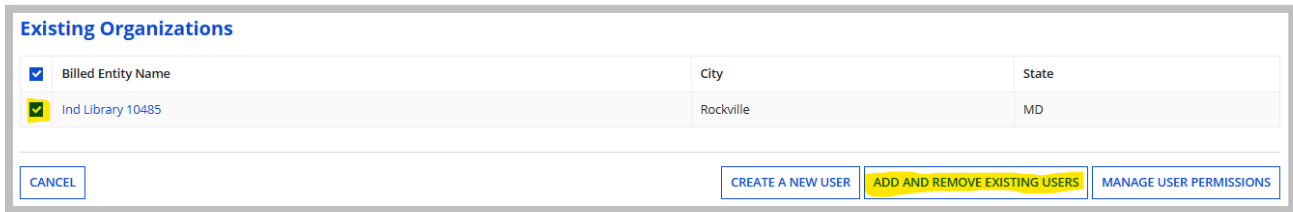
NO   YES

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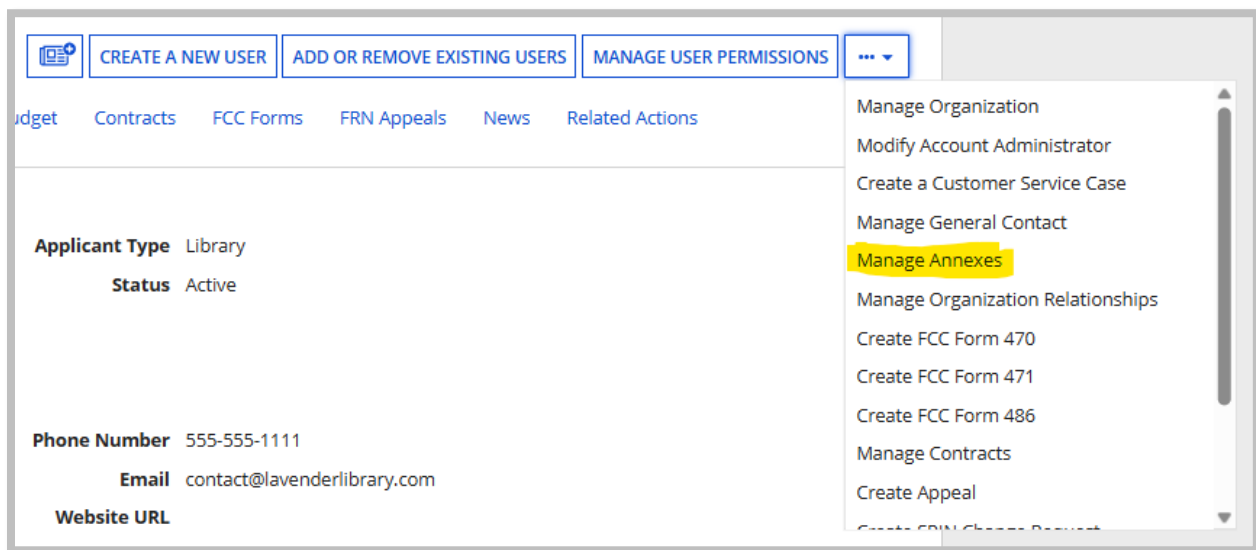
3. Select **Remove Existing Annex.**
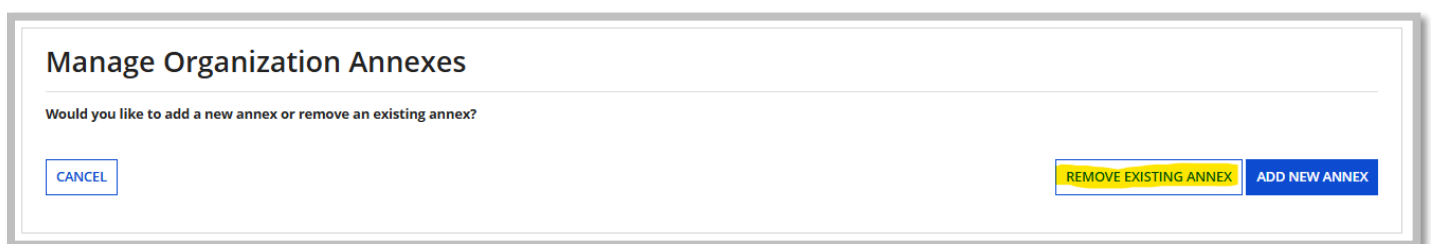
4. Select the annex to be removed then click **Remove Annex**.

Remove Annex

Select the annex(es) you would like to remove and click 'Remove Annex'.

*

☑	Name ↑	City	State	Last Modified Date	Last Modified By
☑	Lavender Public Library Annex	Smalltown	OK	5/1/2025 4:27 PM EDT	il_user_10485@mailinator.com

CANCEL   REMOVE ANNEX

5. Select **Yes**.

Are you sure you would like to remove the selected annexes?

NO   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.

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help

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

Existing Organizations

	Billed Entity Name	City	State
☑	Ind Library 10485	Rockville	MD

CANCEL   CREATE A NEW USER ADD AND REMOVE EXISTING USERS MANAGE USER PERMISSIONS

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

Name	E
Rachel Reklaw	il_
Willow Waters	w
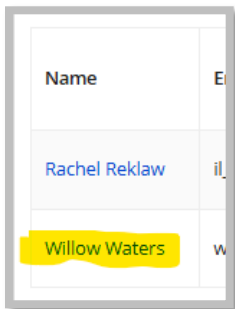
4. This opens up the user's EPC User Profile. On the menu bar, select **Related Actions**.

Records / Users
My EPC User Profile
Summary   EPC Additional Information   News   Related Actions

Willow Waters

5. Select **Deactivate User**.

14

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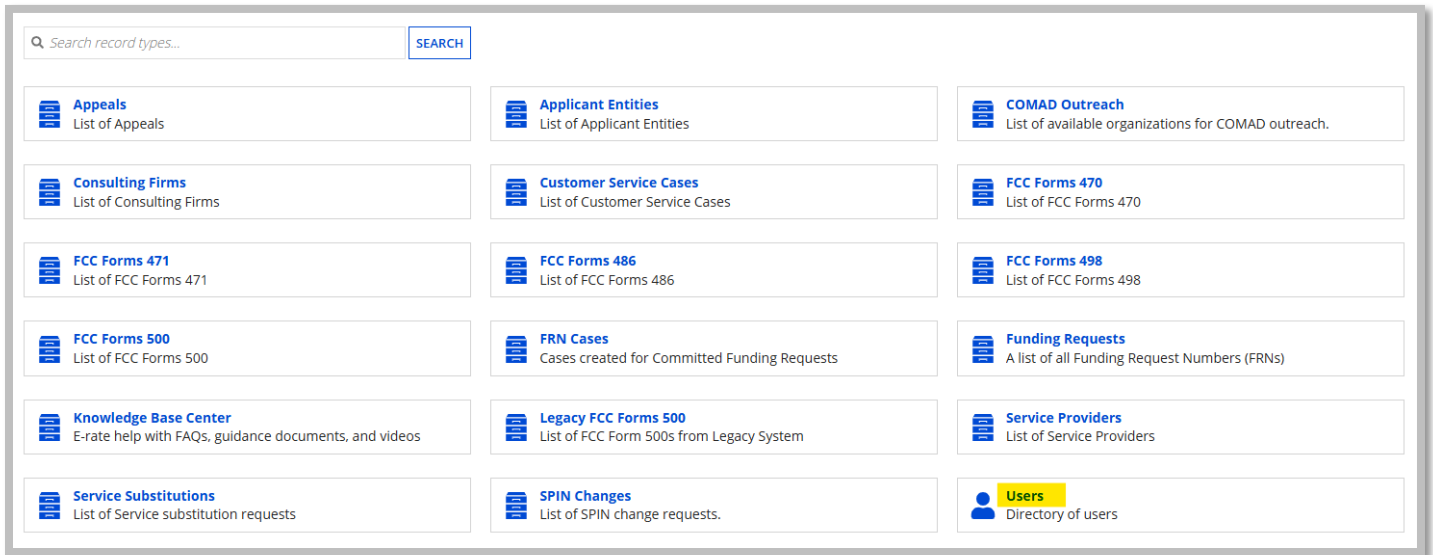
3. Enter the **first name and last name** of the person you're searching, and select **Search**.

4. Select the **Name**.

Name	↑	Email Address
Taylor Meriwether		taylor.erate@libraries.ok.gov

5. Select **Related Actions**.

Records / Users
My User Profile

Summary   EPC Additional Information   News   Related Actions

6. Select **Deactivate User**.

Records / Users
My User Profile

Summary   EPC Additional Information   News   Related Actions

⚡ **Manage EPC User Profile**
This process allows for updates to the user profile

⚡ **Deactivate User**
This process allows deactivation of users

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

Deactivate User

Notes *

User no longer works at the Oklahoma Department of Libraries.

Click submit to deactivate this user

CANCEL   SUBMIT

8. Select **Yes**.

This user will no longer have access to the EPC. Do you want to proceed?

NO   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.

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help
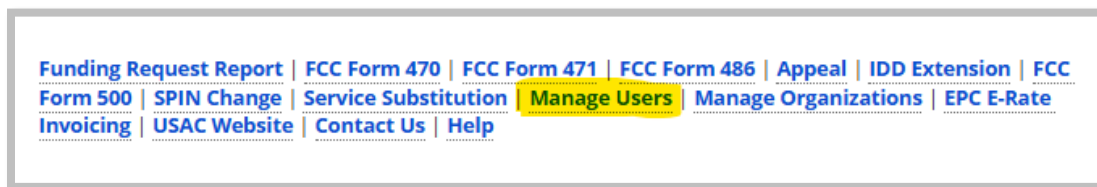
2. Check the box next to the name of your library and select **Manage User Permissions**.

Existing Organizations

	Billed Entity Name	City	State
☑	Ind Library 10485	Rockville	MD

CANCEL   CREATE A NEW USER | ADD AND REMOVE EXISTING USERS | 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**.

	Full	Full	Full	School or Library Official	Full	Full	Full	

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.
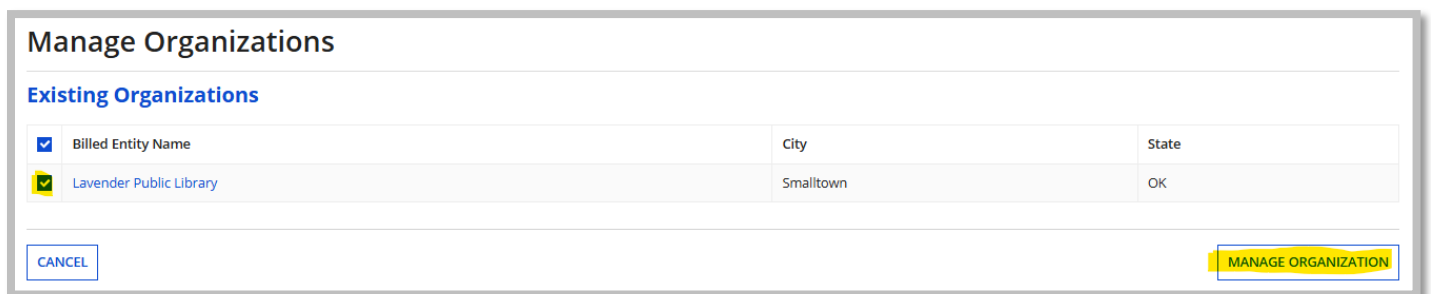

2. Select the library and then click **Manage Organization**.

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.

My Applicant Landing Page

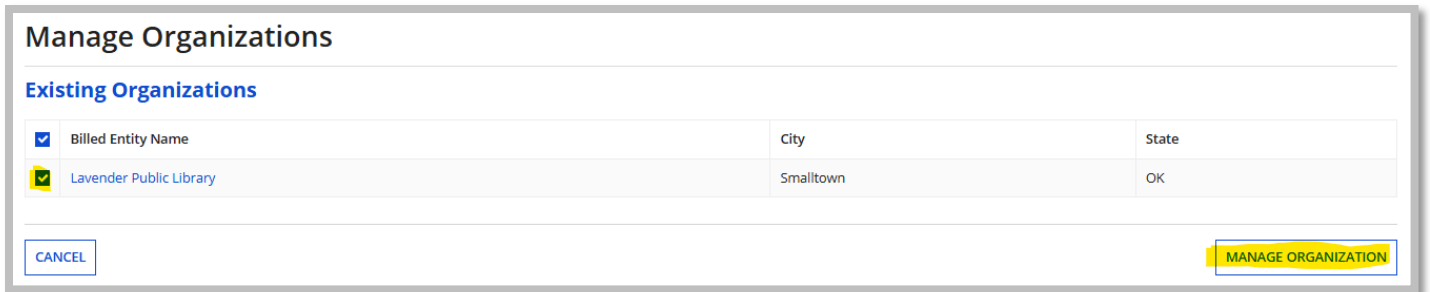Training
Universal Service
Administrative Co.

Welcome, Lavender Public Library!

Pending Inquiries

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | Manage Users | Manage Organizations | EPC E-Rate Invoicing | USAC Website | Contact Us | Help

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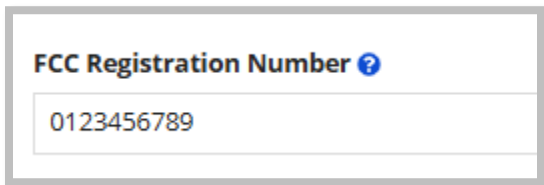
Manage Organizations

Existing Organizations

Billed Entity Name	City	State
Lavender Public Library	Smalltown	OK

CANCEL   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**.

FCC Registration Number ❓

0123456789