

# E-RATE PRODUCTIVITY CENTER (EPC) APPLICANT USER GUIDE

## Managing Users

### Manage Users in Applicant Entities/Consulting Firms

Only account administrator users can manage other users in their organization.

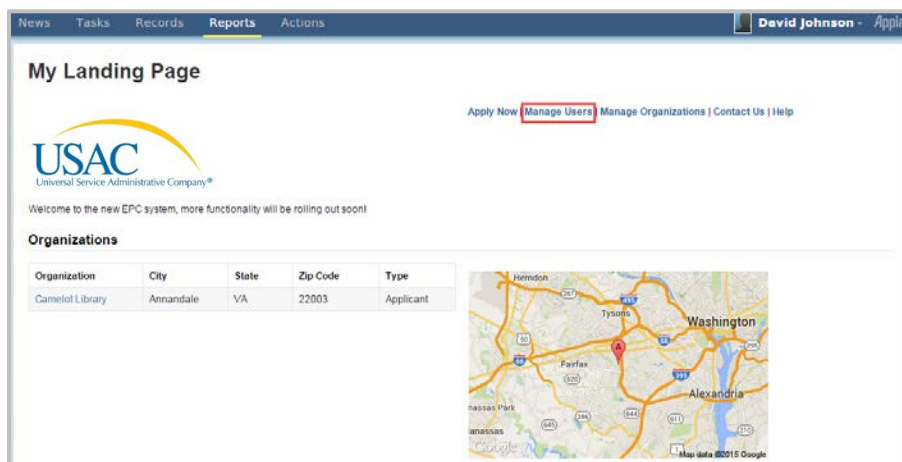
The available actions will vary depending on the type of organization. If users and organizations are part a system or district, in EPC they must be managed at the system or district level.

If you are an organization account administrator, you will be able to:

- Create a New User
- Remove Existing Users
- Manage User Permissions
- Manage Organization
- Modify Account Administrator
- Create a Customer Service Case
- Manage General Contact
- Manage Annexes
- Manage Organization Relationships

### Create a New User

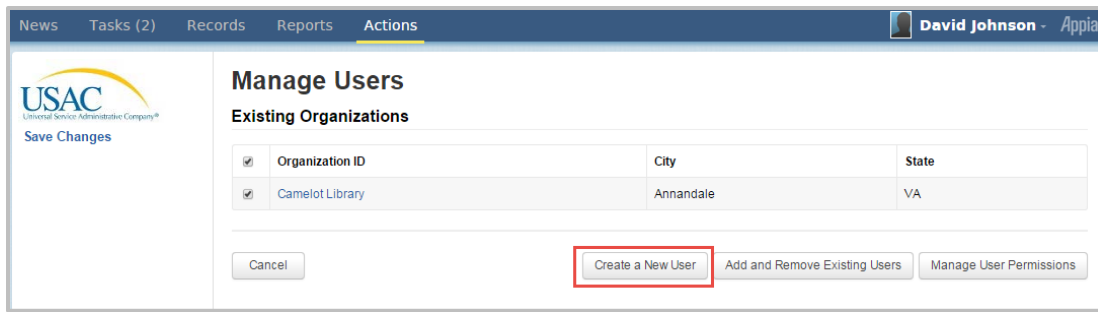
1. From your landing page, click the link for **Manage Users**.



2. Select your organization from the list.

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3. Click **Create a New User**.



The screenshot shows the 'Manage Users' page in the USAC system. At the top, there are navigation tabs: News, Tasks (2), Records, Reports, and Actions. The user's name 'David Johnson' and role 'Applicant' are visible in the top right. The main heading is 'Manage Users'. Below it, there is a section for 'Existing Organizations' with a table:

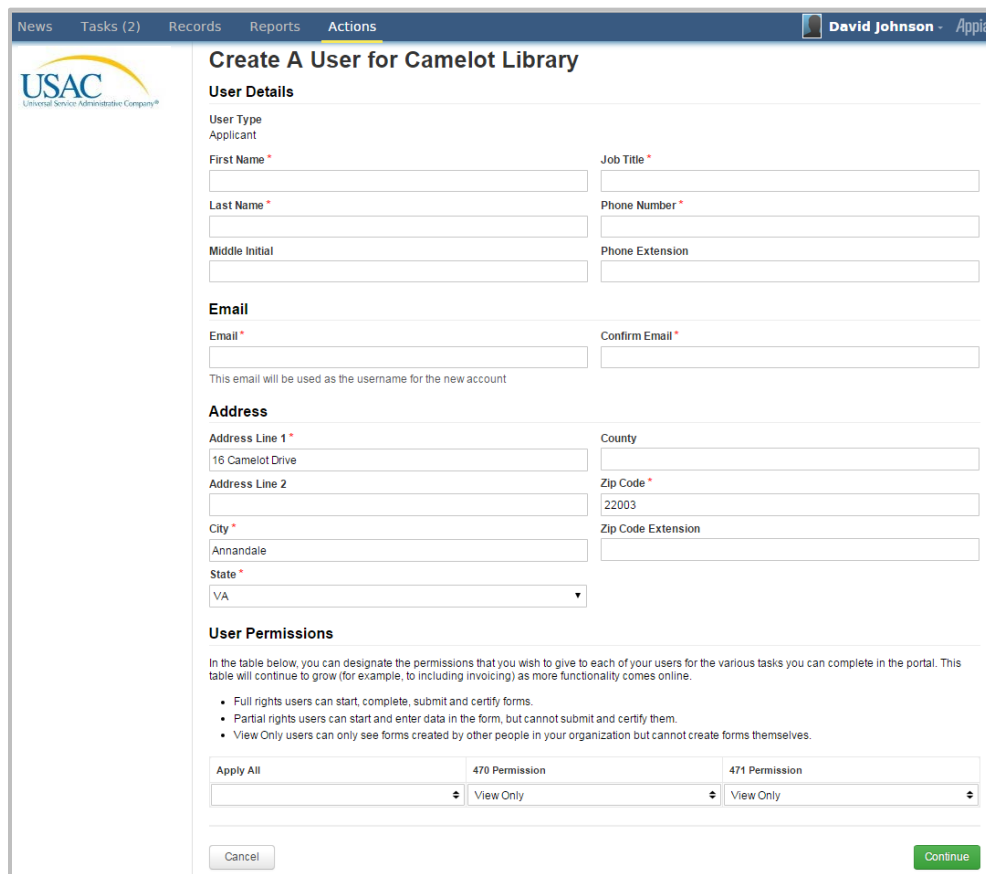
Organization ID	City	State
<input checked="" type="checkbox"/> Camelot Library	Annandale	VA

At the bottom of the page, there are three buttons: 'Cancel', 'Create a New User' (highlighted with a red box), 'Add and Remove Existing Users', and 'Manage User Permissions'.

4. Enter the **User Details**:

- Name
- Title
- Phone
- Email

5. Modify the address if necessary. The address for the user defaults to the address for the organization.



The screenshot shows the 'Create A User for Camelot Library' form. The form is divided into several sections:

- User Details:** Includes fields for User Type (Applicant), First Name, Last Name, Middle Initial, Job Title, Phone Number, and Phone Extension.
- Email:** Includes fields for Email and Confirm Email. A note states: 'This email will be used as the username for the new account'.
- Address:** Includes fields for Address Line 1 (16 Camelot Drive), Address Line 2, County, Zip Code (22003), City (Annandale), State (VA), and Zip Code Extension.
- User Permissions:** Includes a table for designating permissions for various tasks.

At the bottom of the form, there are 'Cancel' and 'Continue' buttons.

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6. Select the permissions for the new user:
  - “Full rights” users can certify forms.
  - “Partial rights” users can create and edit forms.
  - “View only” users can see forms for your organization but not create or edit them.
  - To apply the same permissions to all forms, use the **Apply All** drop-down menu. To set the permissions at the individual form level, use the associated drop-down menu.

**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 (for example, to including invoicing) 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.

Apply All	470 Permission	471 Permission
View Only	View Only	View Only

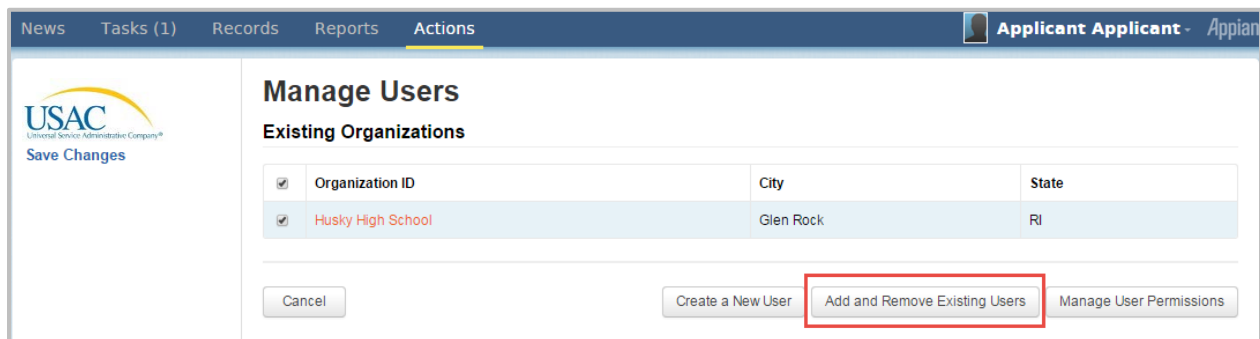
7. Click **Continue**.
8. Review the information on the **Confirm User Details** page.
9. To confirm the information, click **Submit**.
10. A pop-up window appears. To confirm that you would like to proceed, click **Yes**.

The new user will receive an invitation email to sign in to EPC, create a password, and accept the terms and conditions.

**NOTE:** The user must accept the terms and conditions before you can modify his or her role. Once the new user accepts the terms and conditions, he or she will have access to the functionality that the role permits.

## Add or Remove Existing Users

Use the **Add or Remove Existing Users** function to add an existing user to an organization, including adding a consultant to an applicant entity.



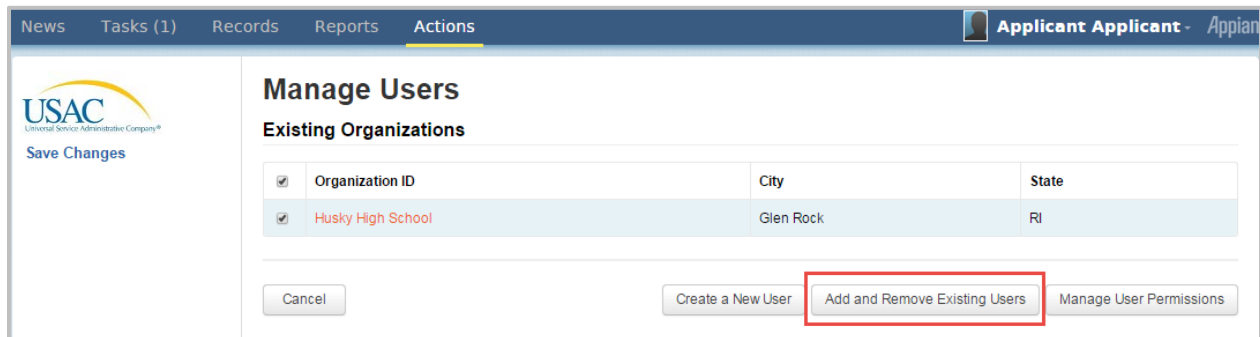
The screenshot shows the 'Manage Users' section of the USAC portal. Under 'Existing Organizations', there is a table with one entry: Husky High School. At the bottom of the page, there are three buttons: 'Cancel', 'Create a New User', and 'Add and Remove Existing Users' (which is highlighted with a red box), and 'Manage User Permissions'.

**NOTE:** Before you can add a user from a consulting firm to an organization, the consulting firm must be related to the organization. See “Adding a Consulting Firm” below.

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## Add a User

1. From the landing page, click **Manage Users**.
2. Select your organization from the list of organizations.
3. Click **Add and Remove Existing Users**.

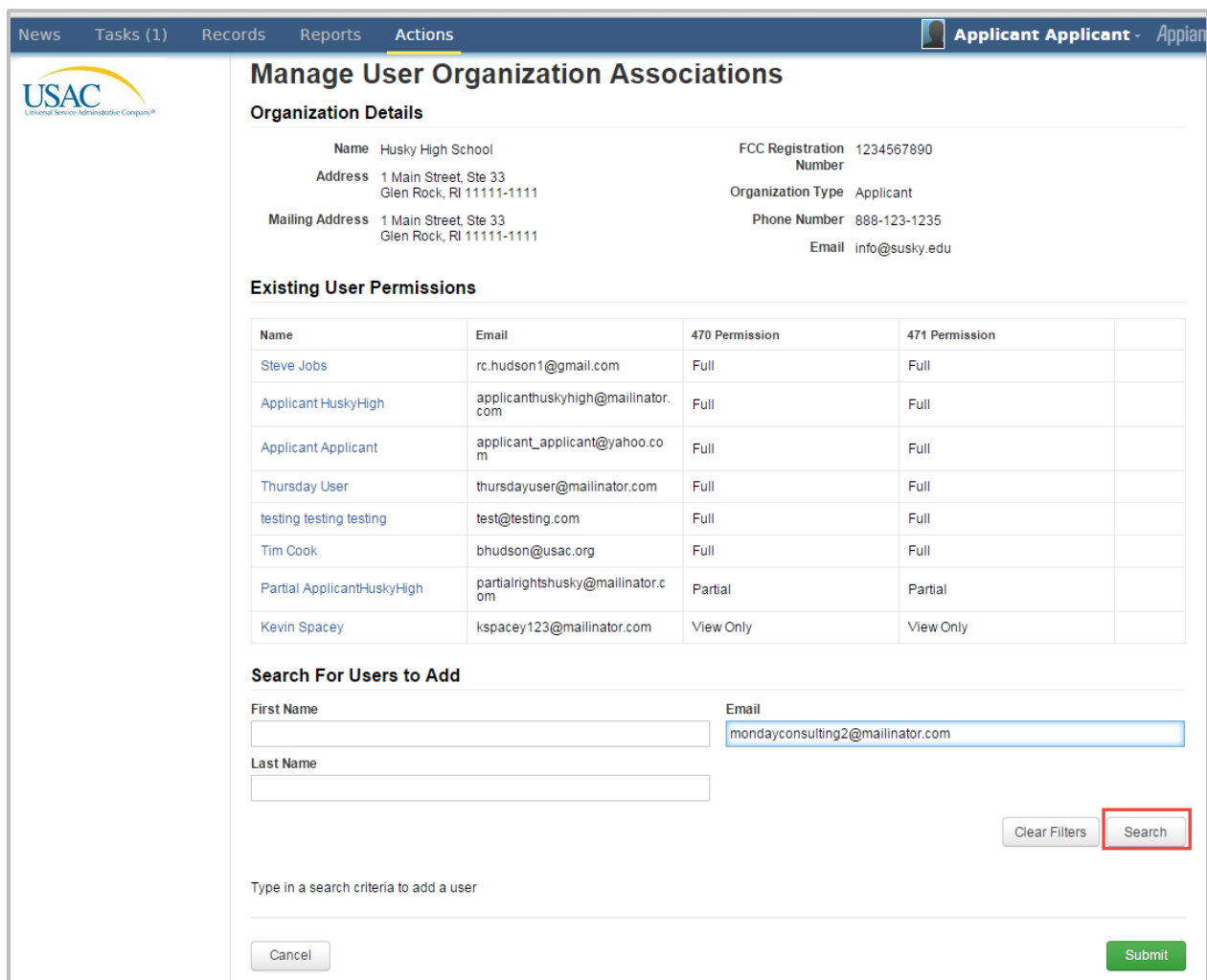


The screenshot shows the 'Manage Users' page with the 'Existing Organizations' table. The 'Add and Remove Existing Users' button is highlighted with a red box.

Organization ID	City	State
<input checked="" type="checkbox"/> Husky High School	Glen Rock	RI

Buttons: Cancel, Create a New User, **Add and Remove Existing Users**, Manage User Permissions

4. The list of **Existing User Permissions** opens.
5. In the **Search for Users to Add** section, enter the first name, last name, or email.
6. Click **Search**.



The screenshot shows the 'Manage User Organization Associations' page. It includes 'Organization Details' and a table of 'Existing User Permissions'. The 'Search for Users to Add' section has a 'Search' button highlighted with a red box.

**Organization Details**

Name: Husky High School | FCC Registration Number: 1234567890  
 Address: 1 Main Street, Ste 33, Glen Rock, RI 11111-1111 | Organization Type: Applicant  
 Mailing Address: 1 Main Street, Ste 33, Glen Rock, RI 11111-1111 | Phone Number: 888-123-1235  
 Email: info@susky.edu

Name	Email	470 Permission	471 Permission
Steve Jobs	rc.hudson1@gmail.com	Full	Full
Applicant HuskyHigh	applicanthuskyhigh@mailinator.com	Full	Full
Applicant Applicant	applicant_applicant@yahoo.com	Full	Full
Thursday User	thursdayuser@mailinator.com	Full	Full
testing testing testing	test@testng.com	Full	Full
Tim Cook	budson@usac.org	Full	Full
Partial ApplicantHuskyHigh	partialrightshusky@mailinator.com	Partial	Partial
Kevin Spacey	kspacey123@mailinator.com	View Only	View Only

**Search For Users to Add**

First Name: [ ] | Email: mondayconsulting2@mailinator.com  
 Last Name: [ ]

Buttons: Clear Filters, **Search**, Cancel, Submit

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7. Select the user from the list.
8. Click **Submit**.

### Search For Users to Add

**First Name**

**Last Name**

**Email**

<input checked="" type="checkbox"/>	Name	Email	Primary Organization
<input checked="" type="checkbox"/>	Monday Consulting	mondayconsulting2@mailinator.com	Monday Testing Consulting Firm

9. A pop-up window appears. To confirm that you would like to proceed, click **Yes**.

## Remove a Consultant User

To remove a consultant user, select the **X** icon next to the user name on the list of users.

News Tasks (1) Records Reports Actions
Applicant Applicant - Applicant



### Manage User Organization Associations

**Organization Details**

<b>Name</b>	Husky High School	<b>FCC Registration Number</b>	1234567890
<b>Address</b>	1 Main Street, Ste 33 Glen Rock, RI 11111-1111	<b>Organization Type</b>	Applicant
<b>Mailing Address</b>	1 Main Street, Ste 33 Glen Rock, RI 11111-1111	<b>Phone Number</b>	888-123-1235
		<b>Email</b>	info@susky.edu

**Existing User Permissions**

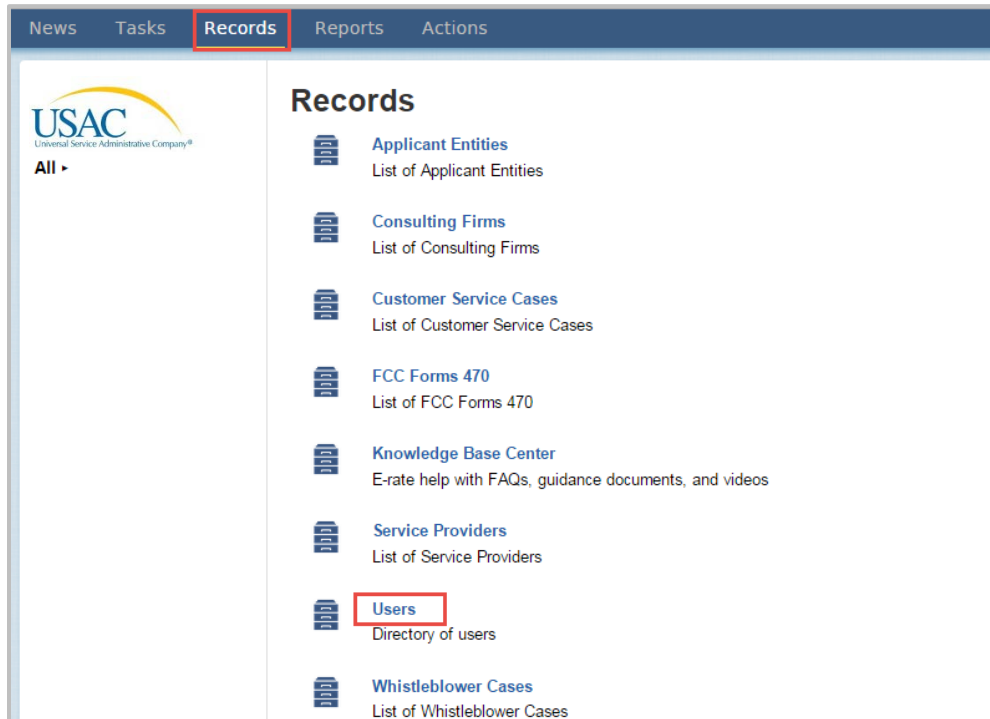
Name	Email	470 Permission	471 Permission	
Steve Jobs	rc.hudson1@gmail.com	Full	Full	
Tim Cook	bhudson@usac.org	Full	Full	
testing testing testing	test@testing.com	Full	Full	
Thursday User	thursdayuser@mailinator.com	Full	Full	
Applicant Applicant	applicant_applicant@yahoo.com	Full	Full	
Applicant HuskyHigh	applicanthuskyhigh@mailinator.com	Full	Full	
Partial ApplicantHuskyHigh	partialrightshusky@mailinator.com	Partial	Partial	
Kevin Spacey	kspacey123@mailinator.com	View Only	View Only	
Monday Consulting	mondayconsulting2@mailinator.com	View Only	View Only	

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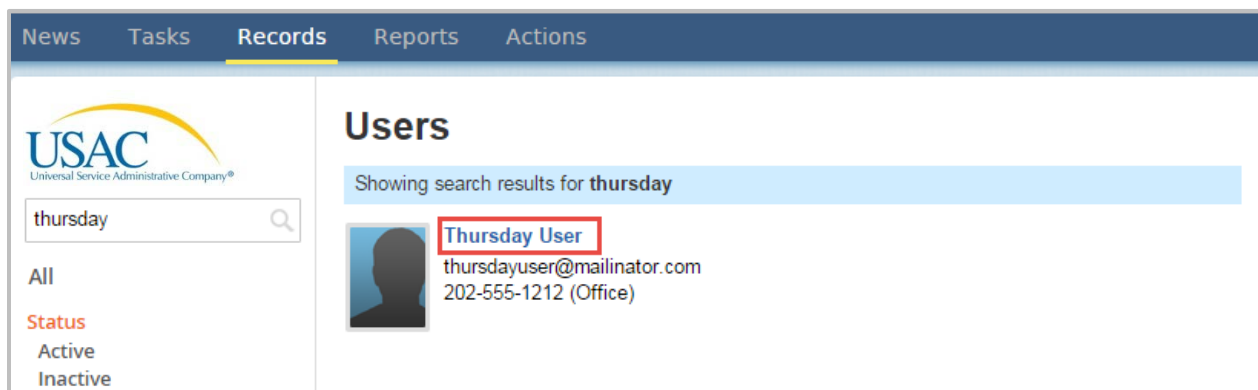
## Remove Other Users in Your Organization

You can deactivate other users in your organization.

1. Select **Records** from the main menu.
2. Click the **Users** link.

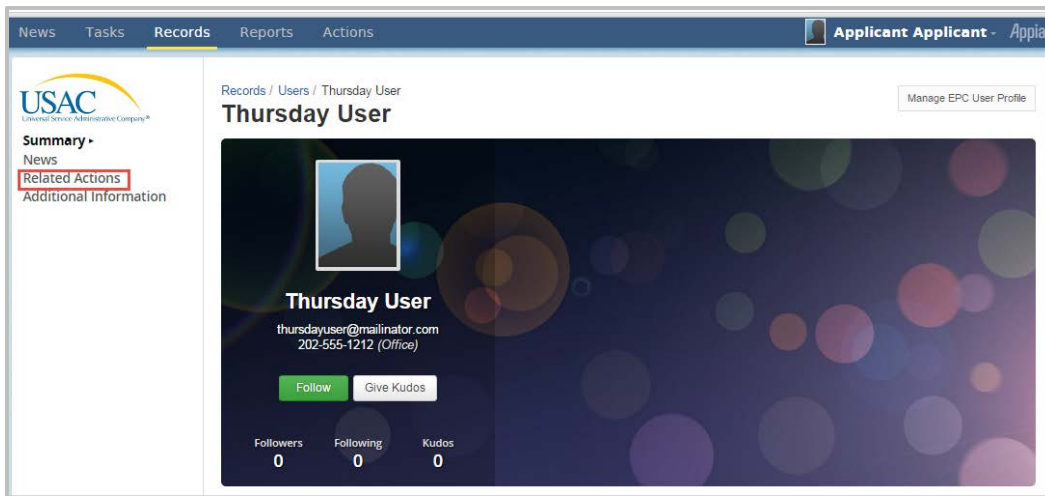


3. Locate the user in the list by entering their name.
4. After locating the user, click the user name link.



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- The user profile opens. Click **Related Actions**.



- Click **Deactivate User**.
- Enter a note explaining the reason for deactivating the user.

### Deactivate User

**User Details**

Username	thursdayuser@mailinator.com	Primary Organization	Husky High School
User Type	Applicant		

**User Information**

First Name	Thursday	Phone Number	202-555-1212
Middle Initial		Job Title	tester
Last Name	User		

**Deactivate User**

Notes \*

the user is no longer with this organization.

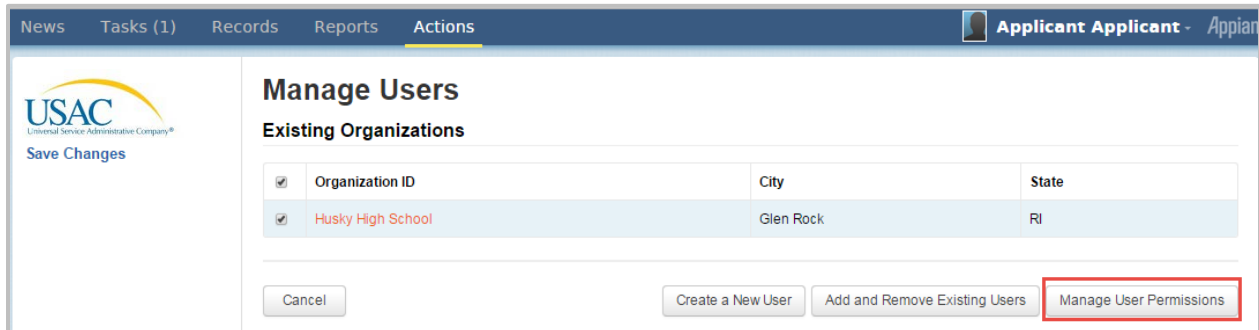
Click submit to deactivate this user

- Click **Submit** and confirm this action.

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## Manage User Permissions

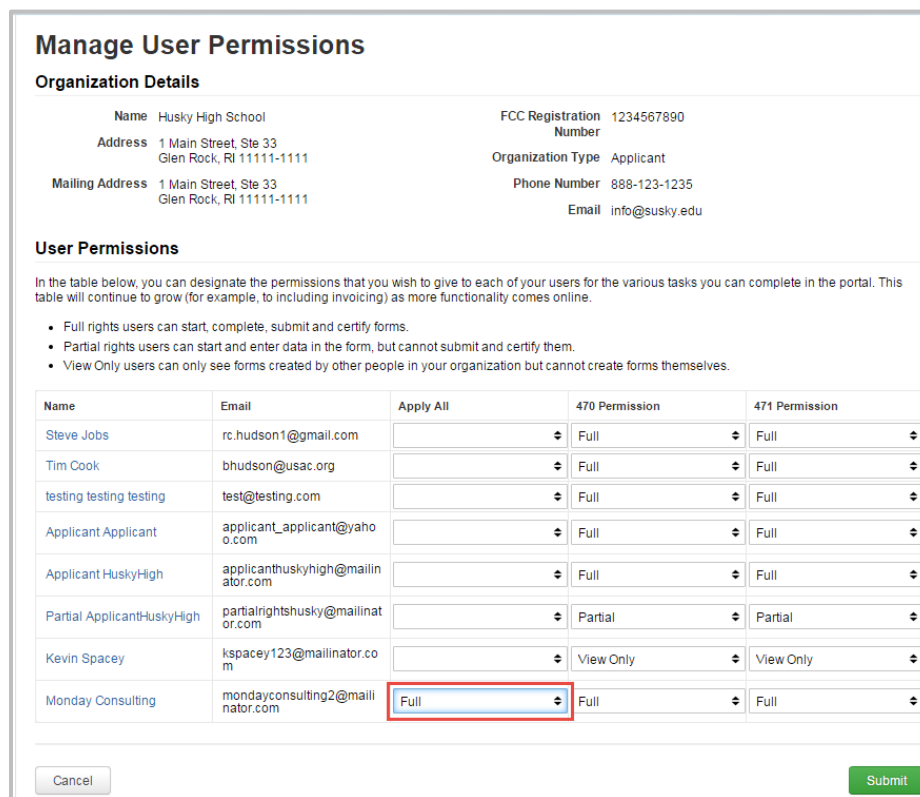
1. From your landing page, select **Manage Users**.
2. Select your organization from the list of **Existing Organizations**.
3. Select **Manage User Permissions**.



The screenshot shows the 'Manage Users' page with a navigation bar at the top containing 'News', 'Tasks (1)', 'Records', 'Reports', and 'Actions'. The 'Actions' menu is active. On the left, there is a USAC logo and a 'Save Changes' button. The main content area is titled 'Manage Users' and 'Existing Organizations'. It contains a table with columns for 'Organization ID', 'City', and 'State'. One row is visible for 'Husky High School' in 'Glen Rock', 'RI'. Below the table are three buttons: 'Cancel', 'Create a New User', and 'Add and Remove Existing Users'. A fourth button, 'Manage User Permissions', is highlighted with a red rectangular box.

4. Locate the user's name, then use the drop-down menu to assign the correct permissions.

**NOTE:** "Full permission" users can certify forms, "partial permission" users can create and edit, "view only" users cannot create or edit forms, just view them.



The screenshot shows the 'Manage User Permissions' form. It is divided into two main sections: 'Organization Details' and 'User Permissions'.  
**Organization Details:**  
 Name: Husky High School, FCC Registration Number: 1234567890  
 Address: 1 Main Street, Ste 33, Glen Rock, RI 11111-1111, Organization Type: Applicant  
 Mailing Address: 1 Main Street, Ste 33, Glen Rock, RI 11111-1111, Phone Number: 888-123-1235, Email: info@susky.edu  
**User Permissions:**  
 A table lists users and their permissions for 'Apply All', '470 Permission', and '471 Permission'. The 'Monday Consulting' user is highlighted with a red box, and their 'Apply All' permission is set to 'Full'.  
 In the 'User Permissions' section, there is a paragraph: "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 (for example, to including invoicing) as more functionality comes online."  
 Below the paragraph are three bullet points:  
 • 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.  
 At the bottom of the form are 'Cancel' and 'Submit' buttons.

5. Select **Submit**.

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