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.

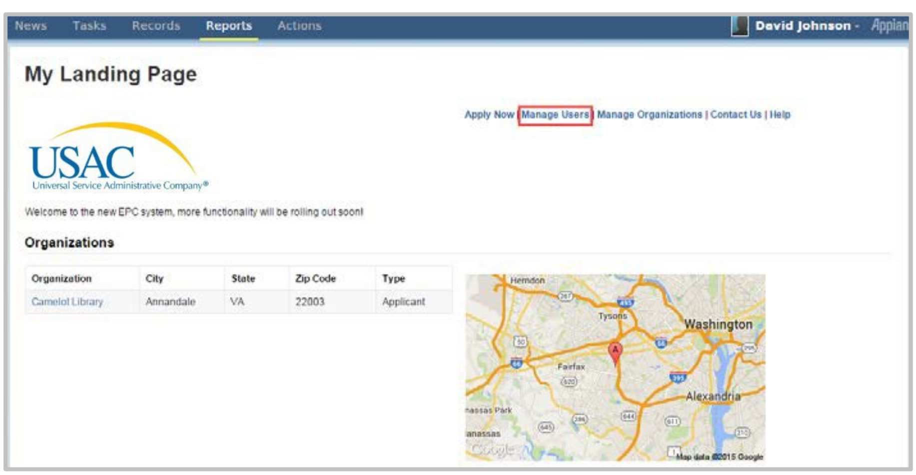
The available actions will vary depending on the type of organization. If users and organizations are part of a system or district, in EPC they must be managed at the system or district level.

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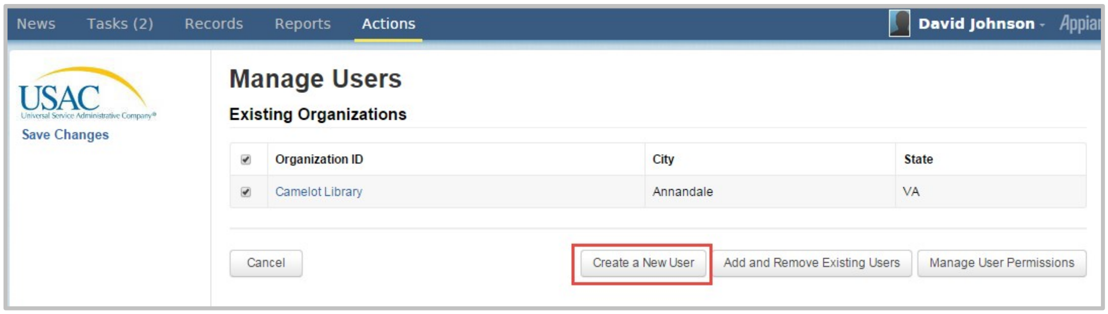
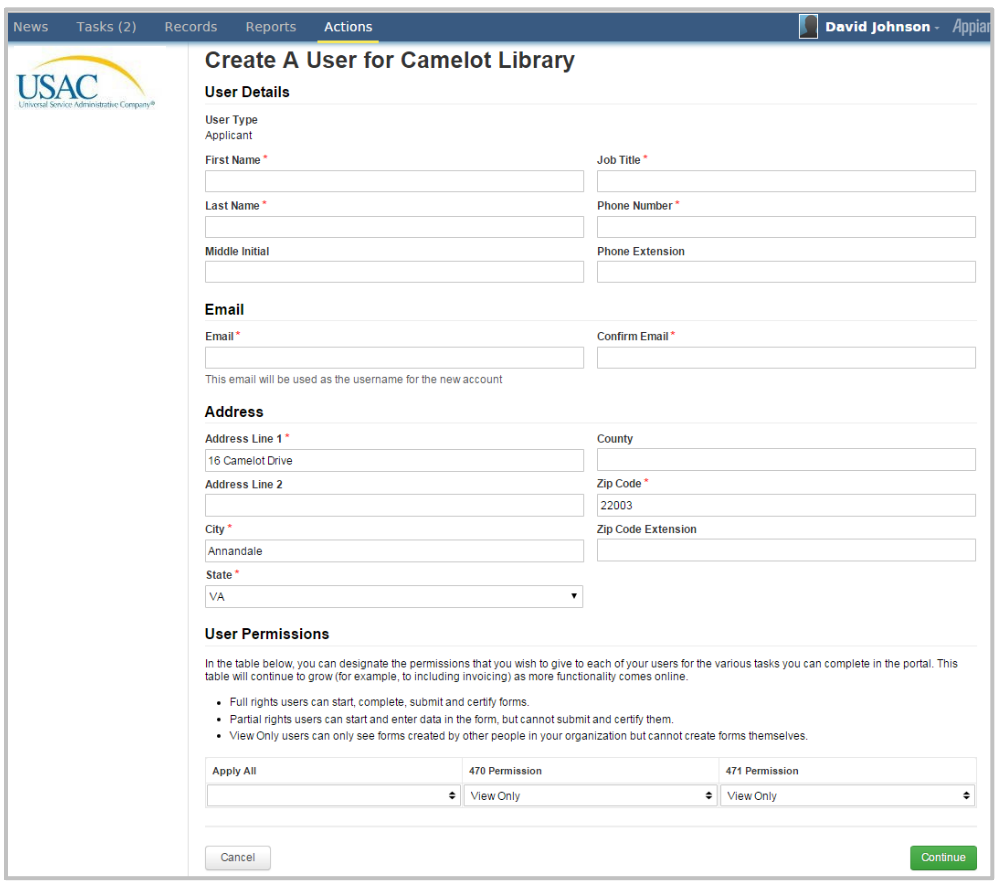
3. Click **Create a New User**.

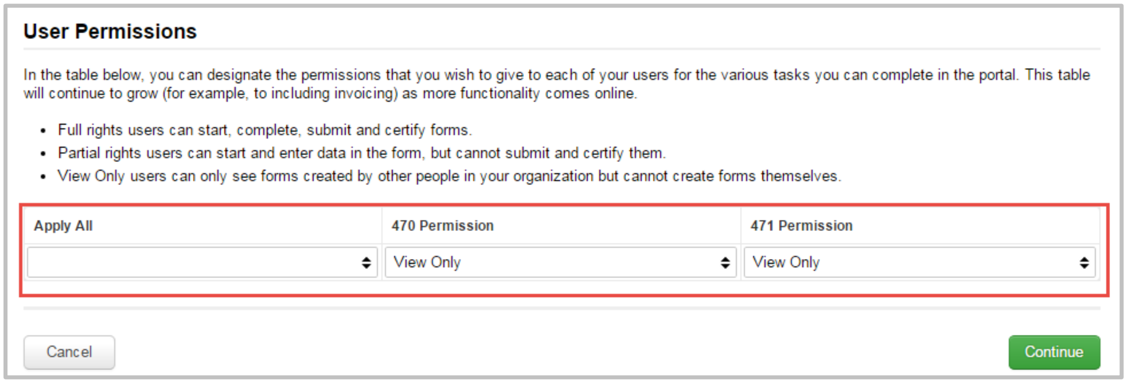


4. Enter the **User Details**:
   - Name
   - Title
   - Phone
   - Email

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



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.



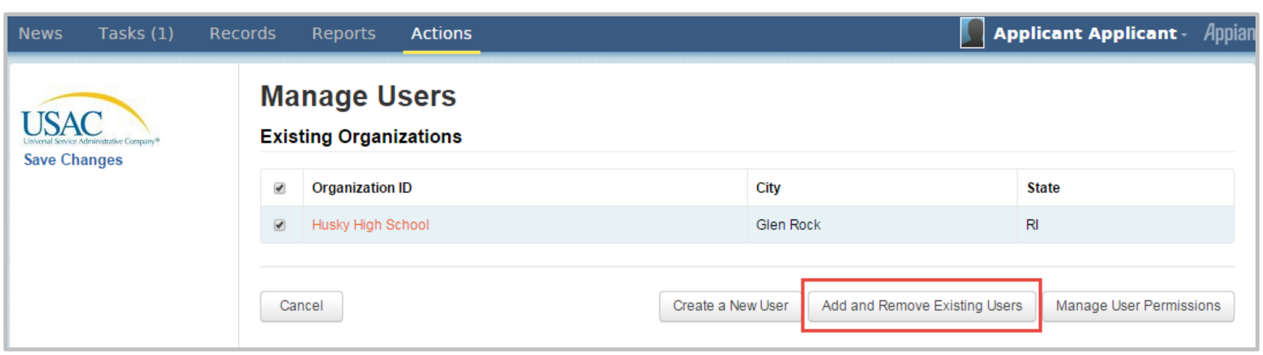
7. Click **Continue.**
8. Review the information on the **Confirm User Details** page.
9. To confirm the information, click **Submit.**
10. A pop-up window appears. To confirm that you would like to proceed, click **Yes**.

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.



NOTE: Before you can add a user from a consulting firm to an organization, the consulting firm must be related to the organization. See the “Add a Consulting Firm” section of the Managing Your Organization User Guide .

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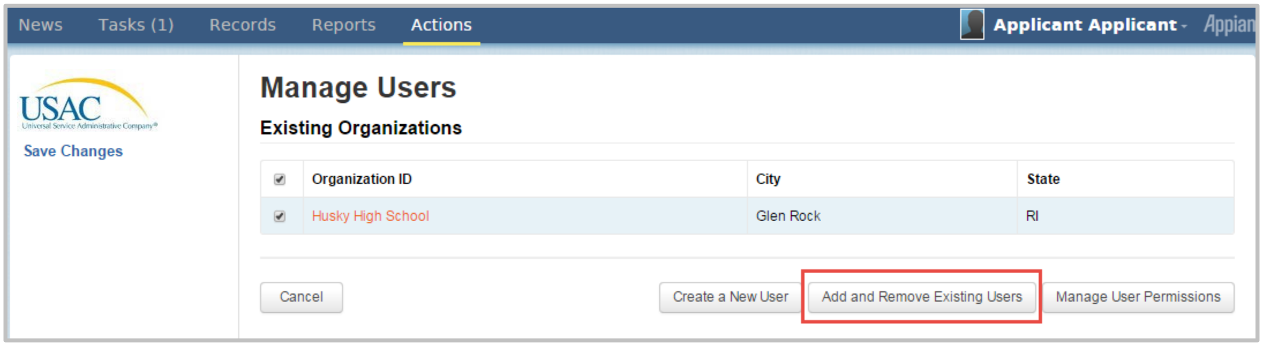
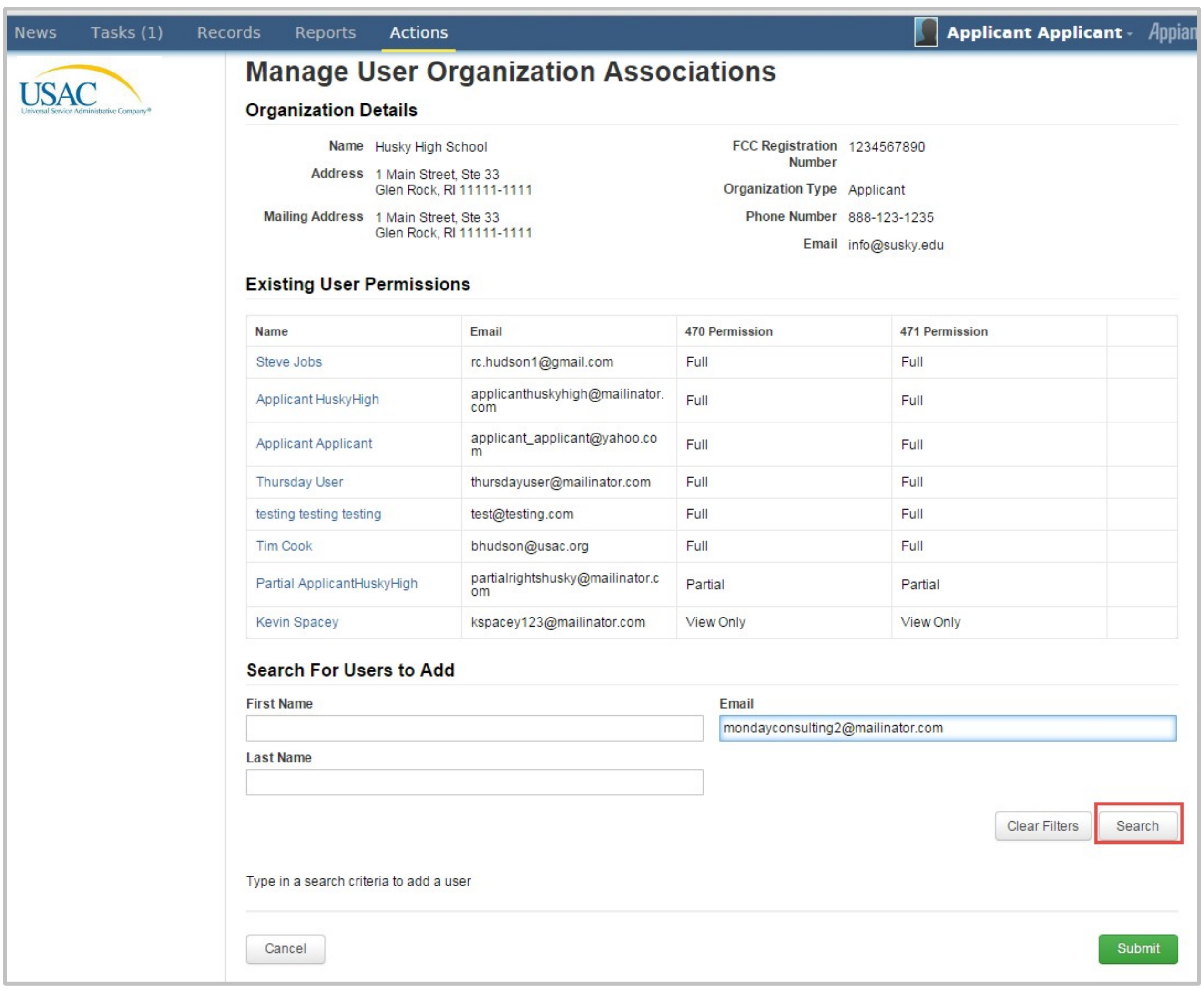
Add a User

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



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**.



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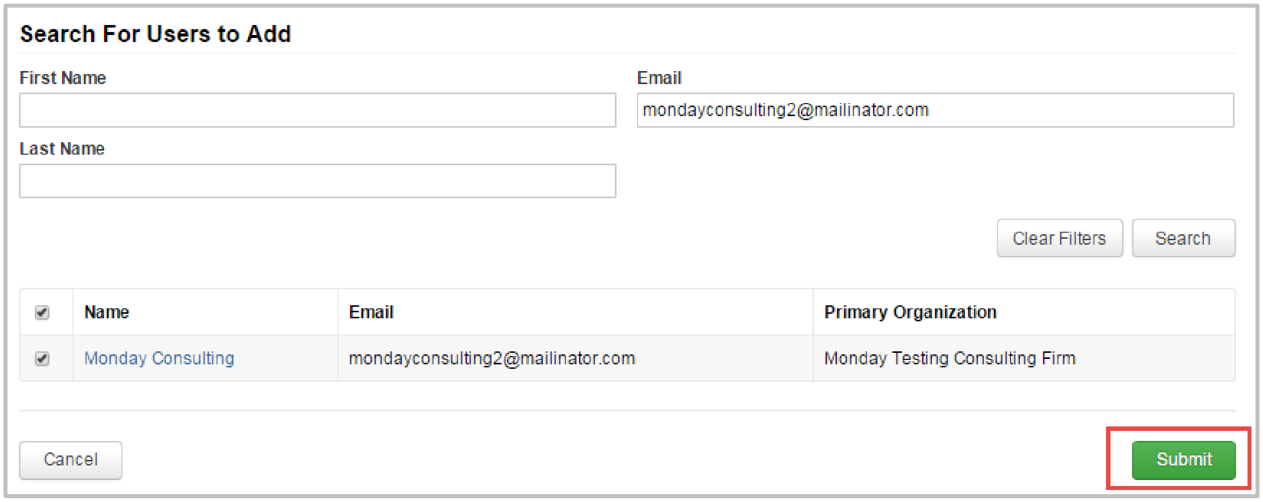
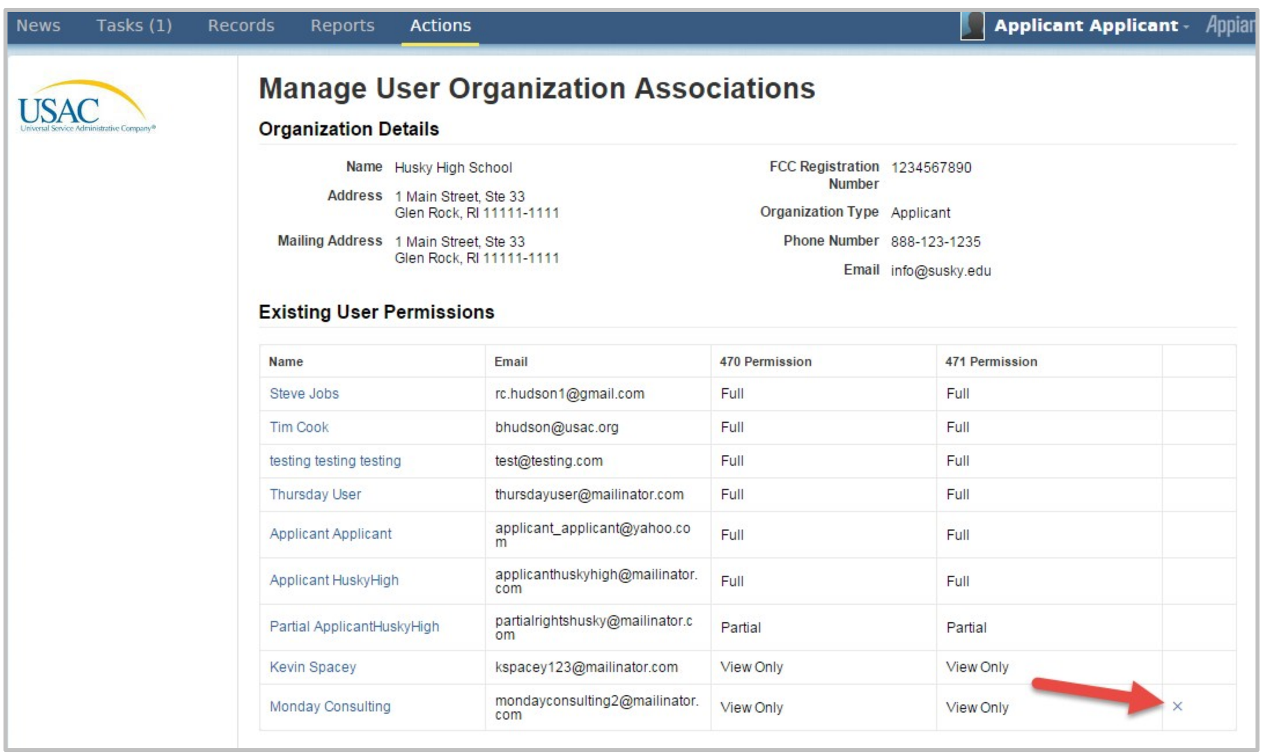
7. Select the user from the list.
8. Click **Submit.**



9. A pop-up window appears. To confirm that you would like to proceed, click **Yes**.To assign the new user's permissions, see Manage User Permissions below.

Remove a Consultant User

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



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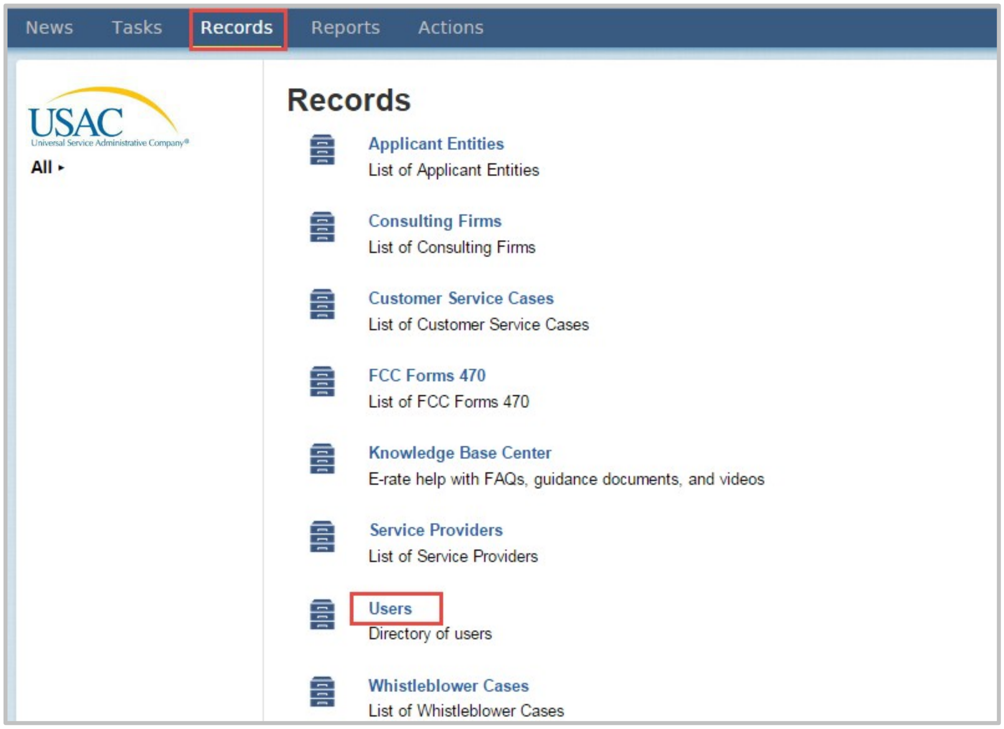
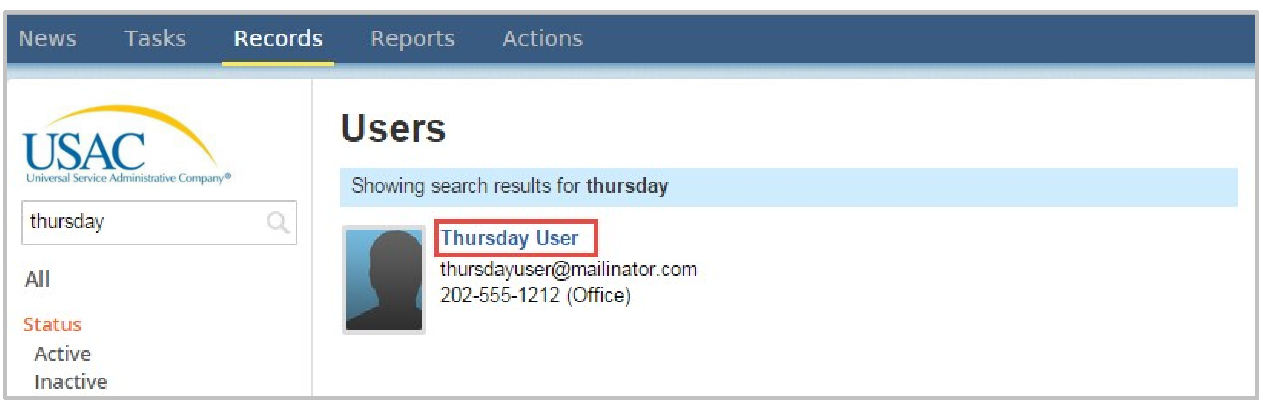
Remove Other Users in Your Organization

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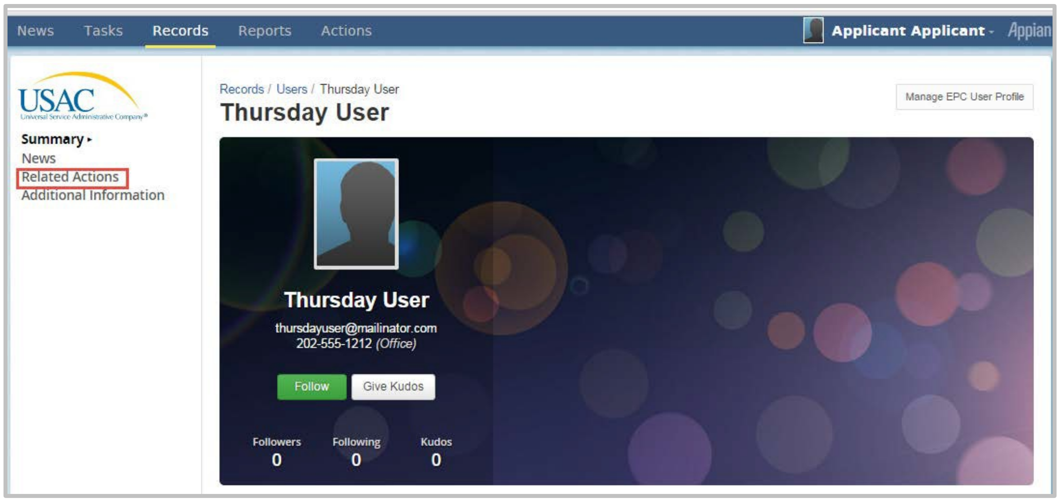
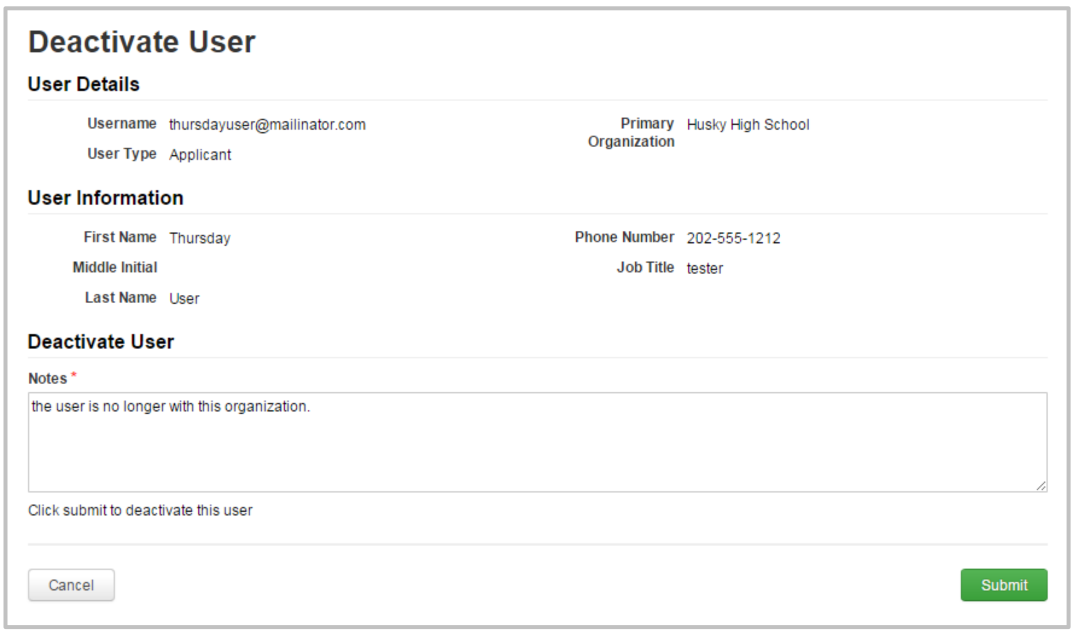
5. The user profile opens. Click **Related Actions**.



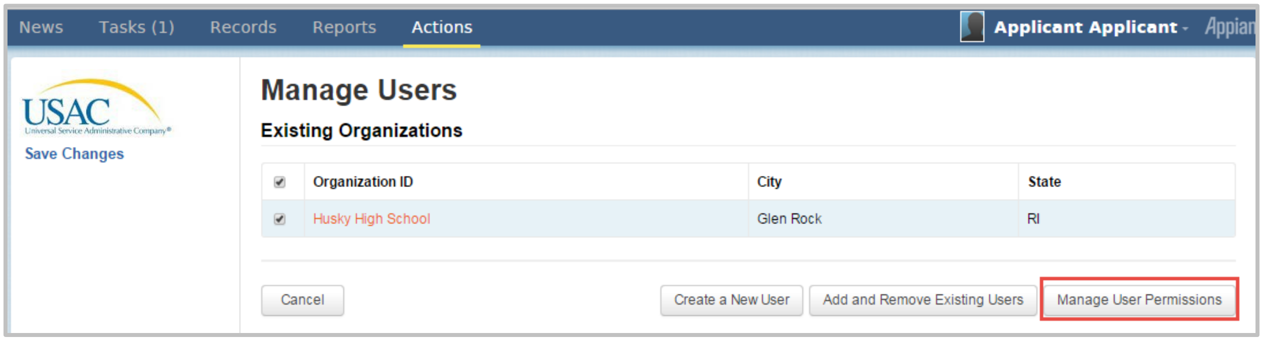
6. Click **Deactivate User**.
7. Enter a note explaining the reason for deactivating the user.



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

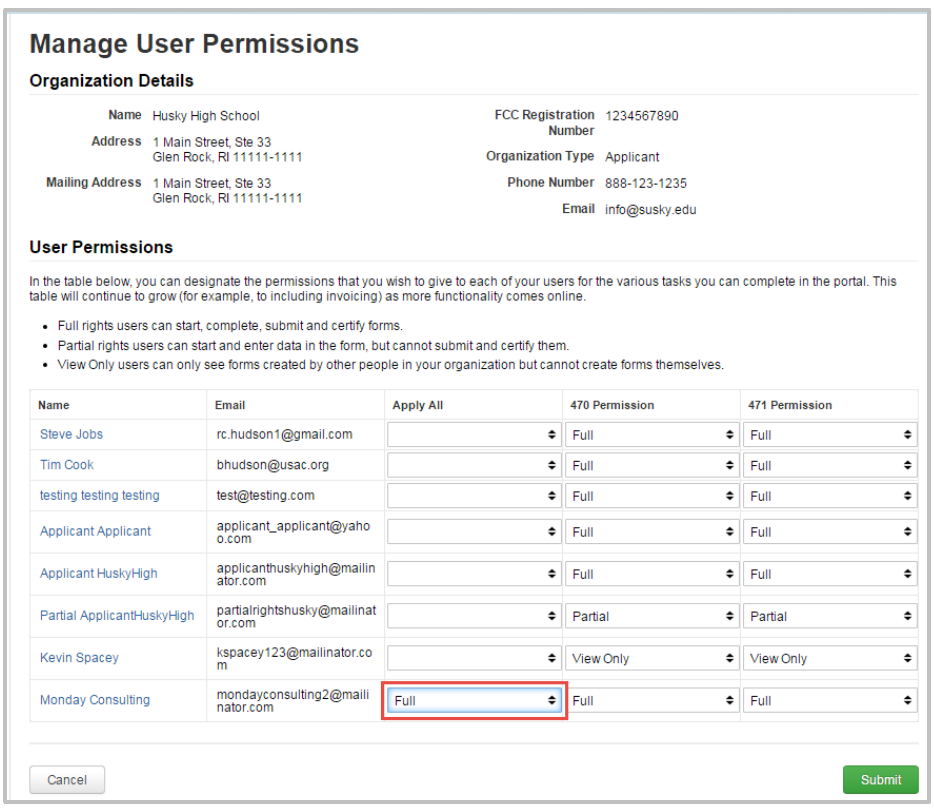
Manage User Permissions

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



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.



5. Select **Submit.**

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