

## How to Add a Consulting Firm

If you use an E-Rate consulting firm, you must link your Billed Entity to that consulting organization, and THEN add individual consultant(s) within that consulting organization as EPC Users.

Only the Account Administrator can add a consulting firm and individual consultant users.

<b>1</b>	<b>STEP 1: Link a Consulting Firm to Your Organization</b> <ol style="list-style-type: none"><li>1) Log into One Portal using multifactor authentication at <a href="https://forms.universalservice.org/portal">https://forms.universalservice.org/portal</a></li><li>2) Click on the gray block for “E-Rate Productivity Center (EPC)” to access EPC</li><li>3) From your “EPC Landing Page” select the name of your Billed Entity (this would be the school district name, not a school’s name unless you are filing as an independent school)</li><li>4) Click on the “Related Actions” link</li><li>5) On the next page, choose “Manage Organization Relationships”</li><li>6) Select “Add a Consulting Firm” and enter some search criteria for your consulting firm and click “SEARCH”</li><li>7) Check the box to the left of the Consulting Firm’s name and then click “SUBMIT”</li><li>8) Click “YES” in the pop up window that appears</li><li>9) The consulting firm is now associated with your Billed Entity</li></ol>
<b>2</b>	<b>STEP 2: Add EPC Consultant Users</b> <ol style="list-style-type: none"><li>1) Go to your “Landing Page”</li><li>2) Click on “Manage Users” in the top right</li><li>3) Click the box beside the name of your Billed Entity</li><li>4) Click on “ADD AND REMOVE EXISTING USERS”</li><li>5) You will see a list of existing users for the Billed Entity</li><li>6) Below that list, enter some search criteria for your consultant and click “SEARCH” (Note: The consulting firm must be linked to your organization before you can add specific consultants)</li><li>7) Check the box to the left of the consultant’s name and then click “SUBMIT”</li><li>8) Click “YES” in the pop up window that appears</li><li>9) After you have added the consultant, you must set up user permissions for that consultant by using the “Manage User Permissions” function (“Landing Page” &gt;&gt;&gt; name of Billed Entity &gt;&gt;&gt; “Related Actions” link &gt;&gt;&gt; “Manage User Permissions”)</li></ol>



## How to Remove a Consulting Firm

The Account Administrator for the organization can either remove a specific consultant user or the entire consulting firm.

If removing the consulting firm, you must FIRST remove the individual consultants and THEN remove the firm.

<b>1</b>	<b>STEP 1: Remove EPC Consultant Users</b> <ol style="list-style-type: none"><li>1) Log into One Portal using multifactor authentication at <a href="https://forms.universalservice.org/portal">https://forms.universalservice.org/portal</a></li><li>2) Click on the gray block for "E-Rate Productivity Center (EPC)" to access EPC</li><li>3) Click on "Manage Users" in the top right</li><li>4) Click the box beside the name of your Billed Entity</li><li>5) Click on "ADD AND REMOVE EXISTING USERS"</li><li>6) You will see a list of existing users for the Billed Entity</li><li>7) Click on the X at the far right of the consultant's name to remove the consultant</li></ol>
<b>2</b>	<b>STEP 2: Remove a Consulting Firm from Your Organization</b> <ol style="list-style-type: none"><li>1) Log into One Portal using multifactor authentication at <a href="https://forms.universalservice.org/portal">https://forms.universalservice.org/portal</a></li><li>2) Click on the gray block for "E-Rate Productivity Center (EPC)" to access EPC</li><li>3) From your "EPC Landing Page" select the name of your Billed Entity</li><li>4) Click on the "Related Actions" link</li><li>5) On the next page, choose "Manage Organization Relationships"</li><li>6) Click on "REMOVE A RELATIONSHIP"</li><li>7) Enter some search criteria for your consulting firm and click "SEARCH" (Note: The consultants must be removed from your organization before you can remove the consulting firm))</li><li>8) Check the box to the left of the consultant firm's name and then click "SUBMIT"</li><li>9) Click "YES" in the pop up window that appears</li><li>10) The consulting firm is now disassociated from your Billed Entity</li></ol>