EPC Administrative Window

2021 Applicant and Service Provider Training

November 18, 2021
DISCLAIMER

To accommodate all attendees, real-time closed captions will be present during this presentation. This is a new feature we are testing out to improve webinar accessibility for all. We understand it is a significant change and appreciate your patience. We apologize in advance for any transcription errors or distractions. Thank you for your support.
Housekeeping – Webinar Panel

• The webinar panel is located on the right-hand side of the screen.
• Open the panel by clicking the orange arrow.

• Use the white arrows to open the sections in the panel.
Housekeeping – Webinar Panel

• You can use the panel to view the presentation in full screen or window mode.

• We are not using the hand raise function.
Housekeeping – Audio

- Use the “Audio” section of your control panel to select an audio source.
- Choose one of the audio options:
  - Your computer's audio
  - Call in using an access code and audio PIN.
- The audience will remain on mute.
Housekeeping – Technical Issues

• Use the “Sound Check” link and click question mark icon for audio help.

• Exit webinar and click the check system requirements link in the event confirmation email to determine whether your computer meets the requirements to see and hear the webinar.

• If issues persist, call 833-851-8340 to troubleshoot with GoToWebinar.
Housekeeping – Resources

• The slide deck is available when you click the arrow to expand the “Handouts” tab.

• A recording of this webinar will be available after the event via the registration link.
Housekeeping – Q&A

• **There will be a live Q&A session focused on today’s topics.**

• **Tips for submitting questions:**
  • Use the “Questions” box in your webinar control panel anytime during the presentation.
  • Click the box with the arrow above the questions box to expand it and see all written answers.
  • Write in full sentences.
  • Ask one question at a time.
  • Ask questions related to webinar content.
Client Service Bureau (CSB)

Call us at (888) 203-8100

Monday – Friday 8 a.m. to 8 p.m. ET

Create a customer service case in the E-rate Productivity Center (EPC):

1. Log in to EPC.
2. Select the Contact Us link from the upper right menu on your landing page.
MEET THE TEAM

Philip Ahn
Senior Product Manager | E-rate program

Nkeshi Free
Communications Specialist | E-rate program
AGENDA

• EPC Administrative Window and One Portal
• Account Administrators and New Users
• Updating Parent and Child Organization Profiles
• Changes to FY2022 Entity Profiles
• Requesting C2 Replacement Budget During FY2021 to FY2025
• Q&A
EPC Administrative Window and One Portal
EPC Administrative Window

The administrative window allows applicants to update their profiles in the E-rate Productivity Center (EPC).

- Opened on October 26, 2021.
- Will close shortly before the Funding Year (FY) 2022 FCC Form 471 application filing window opens.

Why is there an administrative window?

- Libraries and consortia depend on static student counts to accurately calculate their discounts.
- For consistency, certain entity information cannot be changed during the application filing window.
Logging In to One Portal

USAC added One Portal multi-factor authentication (MFA) for EPC and the FCC Form 472 (BEAR Form) on July 27, 2020.

- Users must first log in to One Portal to access USAC applications.
- MFA authenticates a computer user by requiring the entry of two or more separate pieces of information, such as a password known to the user and a code we generate and send to the user to enter in order to gain access.
- USAC has created accounts for EPC users and BEAR Form filers.
- We continue to create accounts as new EPC users are created and new BEAR PINs are issued.
Logging In to One Portal: First-Time Users

Go to the USAC main page at [https://usac.org](https://usac.org) and:

- Click the blue **Sign In** button at the top of the page.
- Read the instruction page and then click the blue **Continue** button at the bottom of the page.
- Click the blue **Forgot password?** link under the **Password** field.
- On the **Reset Password** page, enter your username and then click the **Reset via Email** button.
- The system will send an email to your email address with a temporary link to set your password.
- Follow the instructions to set your password.
Logging In to One Portal: First-Time Users (Continued)

After you log in:

• Accept the **Complete Terms and Conditions** for your use of One Portal.
• Can also provide your cell phone number if you would like to receive your authentication code by text message rather than email.
Account Administrators and New Users
Account Administrators

- Every parent organization (independent school, independent library, school district, library system, consortium) in EPC needs an account administrator.
- Consultants and service providers also need account administrators for their EPC accounts.

**Account Administrators can:**
- Create new users.
- Modify the rights of existing users.
- Modify information about their organization.
- Link or unlink their organization to consulting firms and consortia.
- Modify (change) the account administrator.
New Users

Users can view, create, certify, and submit FCC forms and requests depending on their user permissions.

• **Full-rights user – create, certify, and submit**
  • School or library official – equivalent role to full-rights user for applicant FCC Form 498

• **Partial-rights user – create only**
  • General financial contact – equivalent role to partial-rights user for applicant FCC Form 498

• **View-only rights users – view only**
How to Create a New User

• From your landing page, choose **Manage Users**.
How to Create a New User

- From the Manage Users screen, select your entity, then Create a New User.
How to Create a New User

- Fill in the user details, assign rights, click **Continue** to check your work, then click **Submit**.
- USAC then automatically creates a One Portal account for the user you created.
Granting User Permissions

• The account administrator can modify which rights to assign to each user.
Updating Parent and Child Entity Profiles
All Entities - Update Your Organization’s Profile

- **FCC Registration Number**
  - Verify that the FCC Registration Number (FCC RN) for your billed entity is correct.
  - If you are a school district or library system, you do not need FCC RNs for each of your individual schools or library branches.

- **Contact information**
  - Verify the name, physical address, mailing address, and other contact information for the billed entity and its child entities (individual schools in a school district or library branches in a library system).

- **New entities**
  - For each new entity that is currently missing in your organization's profile, USAC must create the entity for you.
Schools - Update Your Organization and Child Entity Profiles

Independent school/school district student counts

• Review the student counts for each of your schools and update as necessary.

• Starting with FY2021, we will collect two student counts:
  • The first, for the purpose of calculating the discount, is reported at the individual school level.
  • The second, for the purpose of calculating the Category Two (C2) budget, can be reported at the individual school level or at the school district level. This count is fixed for the five-year cycle and will not need to be updated until FY2026, unless you choose to do so.

• For each new school entity that is currently missing in your organization's profile, USAC must create the entity for you.
Libraries - Update Your Organization and Child Entity Profiles

Independent library/library system square footage and main branch

• Verify the square footage for each of your library branches and the designation of your library's main branch.
  • Library systems report square footage at the library branch level (rather than a total at the library system level).

• If you are an independent library, choose your library as your main branch.

• Add square footage to bookmobiles and kiosks. A bookmobile or kiosk with zero square footage will not be included in the library system’s C2 budget calculation.

• For each new library entity that is currently missing in your organization's profile, USAC must create the entity for you.
How to Update a Parent Entity Profile

• From the landing page, click the parent entity name, either from the Welcome message at the top of the page or the first entry in the My Entities section.
How to Update a Parent Entity Profile

Parent entity name – detail 1 to locate parent entity name
How to Update a Parent Entity Profile

Parent entity name – detail 2 to locate parent entity name
How to Update a Parent Entity Profile

• From the parent entity’s profile page, choose **MANAGE ORGANIZATION**.
  
  • You can also choose **Related Actions** and then choose **Manage Organization** from the resulting list.
How to Update a Parent Entity Profile

- You can then update many of the fields in the organization’s entity profile.
How to Update a Child Entity Profile

- From the landing page’s **My Entities** section, click the child entity name.
How to Update a Child Entity Profile

Child entity name – detail to locate child entity name
How to Update a Child Entity Profile

- From the child entity profile, click **MANAGE ORGANIZATION**.
- You can then update the child entity in the same way you updated the parent entity.
Changes to FY2022 Entity Profiles
Entity Profiles – Section Changes

- Parent and child entity attributes section now consistently labeled Applicant Information
- Layout improved for readability
- New section added for C2 Budget Information for both schools and libraries
- Student counts for school districts
  - Entered separately for discounts and C2 budgets
  - School districts can enter one number on the school district profile for C2 budget purposes.
Entity Profiles – School District Information (Formerly Attributes)

Applicant Information

- **School District Sub-Type**
  - [x] Public School District
  - [ ] Private School District
  - [ ] Charter School District
  - [ ] ESA School District

- **State School Code** 1060
- **State LEA Code**
- **NCES Public State Code**
- **NCES Public District Code**
- **NCES Public Building Code**
## Entity Profiles – School District C2 Budget Section

### Category Two (C2) Budget Information

We calculate your Category Two budget and your discount rate separately, and so we collect separate numbers for each. You are allowed to re-use your Category Two student count from year to year within a Category Two budget cycle, so this number needs to be updated less frequently than the student count for your discount rate.

**How does the district report its student count for Category Two budget?**

- One number for my whole district
- A number for each school in the district

### Sum of Student Counts of all Schools in the District

1418

### School Information

**Entity Number or Name**

---Please enter an entity name (at least 3 characters) or an entity number---

<table>
<thead>
<tr>
<th>Entity Number</th>
<th>Entity Name</th>
<th>Total Students for C2 Budget</th>
<th>Is the student count estimated?</th>
<th>Eligible for C2 budget?</th>
</tr>
</thead>
<tbody>
<tr>
<td>178</td>
<td></td>
<td>178</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>305</td>
<td></td>
<td>305</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>415</td>
<td></td>
<td>415</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>520</td>
<td></td>
<td>520</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
**Entity Profiles – School District C2 Budget Section**

- **Options:** Report one student count number for the school district or allow EPC to total the individual school student counts.
- **NOTE:** For school districts with 10 or fewer schools, we recommend that you enter your student counts individually by school to maximize the number of options available for your C2 budget calculation.

---

**Category Two (C2) Budget Information**

We calculate your Category Two budget and your discount rate separately, and so we count from year to year within a Category Two budget cycle, so this number needs to be

**How does the district report its student count for Category Two budget?**

- One number for my whole district
- A number for each school in the district

**Sum of Student Counts of all Schools in the District**

1418
Entity Profiles – School District C2 Budget Section Detail

• **NOTE:** The **Eligible for C2 budget?** column indicates each school that can be included in the school district’s C2 budget calculation (i.e., it features a positive student count or the student count for that subtype of school can be zero).

<table>
<thead>
<tr>
<th>Entity Number</th>
<th>Entity Name</th>
<th>Total Students for C2 Budget</th>
<th>Is the student count estimated?</th>
<th>Eligible for C2 budget?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>178</td>
<td>N/A</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td></td>
<td>305</td>
<td>No</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td></td>
<td>415</td>
<td>No</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td></td>
<td>520</td>
<td>No</td>
<td>✓</td>
</tr>
</tbody>
</table>
## Entity Profiles – School (Child Entity Profile)

### Applicant Information

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latitude</td>
<td>Not Found</td>
</tr>
<tr>
<td>Longitude</td>
<td>Not Found</td>
</tr>
<tr>
<td>Urban/Rural Status</td>
<td>Not Found</td>
</tr>
<tr>
<td>School Sub-Type</td>
<td>Public School</td>
</tr>
<tr>
<td></td>
<td>Private School</td>
</tr>
<tr>
<td></td>
<td>Pre-K</td>
</tr>
<tr>
<td></td>
<td>Head Start</td>
</tr>
<tr>
<td></td>
<td>Adult Education</td>
</tr>
<tr>
<td></td>
<td>Juvenile Justice</td>
</tr>
<tr>
<td></td>
<td>Dormitory</td>
</tr>
<tr>
<td></td>
<td>Charter School</td>
</tr>
<tr>
<td></td>
<td>Tribal School</td>
</tr>
<tr>
<td></td>
<td>New Construction School</td>
</tr>
<tr>
<td></td>
<td>Swing Space</td>
</tr>
<tr>
<td></td>
<td>Detention Center</td>
</tr>
<tr>
<td></td>
<td>General-Use School</td>
</tr>
<tr>
<td></td>
<td>ESA School</td>
</tr>
<tr>
<td></td>
<td>BIE</td>
</tr>
<tr>
<td></td>
<td>ESA School District with no Schools</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User-Entered Latitude</td>
<td></td>
</tr>
<tr>
<td>User-Entered Longitude</td>
<td></td>
</tr>
<tr>
<td>User-Entered Urban/Rural Status</td>
<td></td>
</tr>
<tr>
<td>Community</td>
<td>No</td>
</tr>
<tr>
<td>Eligibility Program (CEIP)</td>
<td></td>
</tr>
<tr>
<td>Alternative Discount Method</td>
<td>None</td>
</tr>
<tr>
<td>Does this organization have an endowment?</td>
<td>No</td>
</tr>
<tr>
<td>Number of Full Time Students</td>
<td>178</td>
</tr>
<tr>
<td>Total Number of Students Eligible for National School Lunch Program (NSLP)</td>
<td>108</td>
</tr>
</tbody>
</table>
Entity Profiles – School C2 Budget (Child Entity Profile)

Category Two (C2) Budget Information

We calculate your Category Two budget and your discount rate separately, and so we collect separate numbers for each. You are allowed to re-use your Category Two student count from year to year within a Category Two budget cycle, so this number needs to be updated less frequently than the student count for your discount rate.

Total Students for C2 178
Entity Profiles – Library System Information (Formerly Attributes) and C2 Budget Section

Applicant Information

Library System Sub-Type
- Public Library System
- Private Library System

Category Two Budget Information

Sum of Square Footage of All Libraries in the System: 87500

Main Library Branch
Entity Profiles – Library Branch (Child Entity Profile)

- For library systems, EPC calculates the total square footage of the system’s library branches.
New School Entity Types

General-use school

- A school that offers instruction to students drawn from other schools.
- Student counts may change throughout a school year.
- Can be magnet schools, vocational schools, or other schools that don't have a consistent population assigned to that school.
- Different students may cycle through the school facility at different times of the year.
- The following organizations may be or may support a "General use school": ESA (Educational Service Agency), Special Education unit, "time out" schools, computer center, career center, or Outward Bound.
- Can have zero or greater student count.
New School Entity Types

Detention center

• Treated in the same way as Juvenile Justice.
• Eligible for funding if that state’s law includes education for students in juvenile justice facilities within its definition of elementary and/or secondary education.
• Can have zero or greater student count.
New School Entity Types

Swing space

- Entity that temporarily houses students from a school which is considered the "main entity" or original location of the student population.
- The student population from the "main entity" may require a transfer to the swing space for a variety of reasons – e.g., main entity permanently or temporarily closed, under construction, or revamping their technological infrastructure.
- Additional space is also allowable, e.g., trailers on school grounds.
- Can only have zero student count.

NOTE: Juvenile justice and new construction are the two existing entity subtypes that, along with these other three, can have a zero student count and still be included in the C2 budget calculation.
Entity Profiles – Bulk Upload Template for Schools

- To locate the template, go to the school district (or independent school) profile page and choose **Related Actions**, then **Upload Entity Profile Data**.
**Entity Profiles – Bulk Upload Template for Schools**

- Enter your individual school data in the spreadsheet, left to right, one line at a time.

Some helper text is available by clicking each header field.

<table>
<thead>
<tr>
<th>Number of Full Time Students</th>
<th>Community Eligibility Program (CEP)?</th>
<th>CEP Percentage</th>
<th>CEP Base Year</th>
<th>Alternative Discount Method</th>
<th>Total Number of Students Eligible for National School Lunch Program (NSLP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>500</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>250</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>300</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>200</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Some error messages are also provided as you are completing the template.
Entity Profiles – Bulk Upload Template Troubleshooting

- Use Excel version 2010 or later.
- Download the template and save it to your hard drive with a name you will remember.
- Open the template and IMMEDIATELY enable content. (Click the Enable Macros button.)
- Enter data from left to right, one row at a time.
- If a field has dropdown values, choose the appropriate value – do not type it in.
  - Hovering over the field will show the drop-down options.
- Do not choose “Yes” for non-instructional facility (NIF). In fact, do not enter NIFs in the template at all.

**NOTE:** The upload results screen in EPC identifies certain errors that occurred during the upload process. However, please keep in mind that pre-existing bugs in the template have not been corrected.
Requesting C2 Replacement Budget During FY2021 to FY2025
Requesting C2 Replacement Budget

• To simplify the C2 budget system, once an applicant validates its student counts or square footage, applicants’ C2 budgets are fixed until the end of the five-year cycle (i.e., FY2021-FY2025) unless the applicant requests an update, or replacement budget.
Requesting C2 Replacement Budget Notes

• Consortia entities may not request replacement budgets for their members during the administrative window.

• ESA school districts can only request for the particular entity, not other associated members.

• Once an entity certifies an application, they will need to submit a Receipt Acknowledgment Letter (RAL) Request to request a replacement C2 budget.
How to Request a Replacement Budget

• During the administrative window (or filing windows, for C2 budget fields only), modify the budgeted entity details:
  • Add or remove dependent entities to budgeted entity.
  • Update student count or square footage of C2 budget calculation method (aggregated calculation or individual calculation).
  • Update individual school or library count or square footage.
• Only full-rights users can request replacement C2 budgets.
  • Partial-rights users can update organization details, but only users with full rights permissions will be able to update the C2 budget.
Requesting a Replacement Budget – Update Entity Details

Your student count has changed relative to the count used to establish your existing C2 budget. To request a replacement C2 budget in 2024, click on the ‘Request Category Two Replacement Budget’ link in the C2 section of your organization Record Summary.

CANCEL  OK
Requesting a Replacement Budget – Entity Related Action

- Go to the budgeted entity’s Related Actions and select Request Replacement Category Two Budget.
## Requesting a Replacement Budget – Confirm Budget

### Request Replacement Category Two Budget

To request this replacement C2 budget, click ‘Request Replacement Budget’. Otherwise, click Cancel.

#### Show Column Definitions

**Budget Established in 2021**

<table>
<thead>
<tr>
<th># Students Requested</th>
<th>Budget Status</th>
<th>Budget</th>
<th>Total In-Review Requested and Committed Costs</th>
<th>Remaining Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>188508</td>
<td>Preliminary</td>
<td>$31,480,836.00</td>
<td>$13,199,662.47</td>
<td>$18,281,173.53</td>
</tr>
</tbody>
</table>

**Replacement Budget, If Requested, for Funding Years 2024 to 2025**

<table>
<thead>
<tr>
<th># Students Requested</th>
<th>Budget Status</th>
<th>Budget</th>
<th>Total In-Review Requested and Committed Costs</th>
<th>Remaining Budget</th>
</tr>
</thead>
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<tr>
<td>207829</td>
<td>Forecast</td>
<td>$34,707,443.00</td>
<td>$13,199,662.47</td>
<td>$21,507,780.53</td>
</tr>
</tbody>
</table>

[CANCEL] REQUEST REPLACEMENT BUDGET
# Requesting a Replacement Budget – Remove Replacement Budget

## Request Replacement Category Two Budget

To remove this replacement C2 budget, click 'Remove Replacement Budget'. Otherwise, click Cancel.

### Show Column Definitions

### Budget Established in 2021

<table>
<thead>
<tr>
<th># Students Requested</th>
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</tr>
</tbody>
</table>

[CANCEL](#)  
[REMOVE REPLACEMENT BUDGET](#)
Administrative Window Tips

• Contract records
  • These can be created after the admin window closes.

• FY2021 RAL requests and appeals
  • File these requests BEFORE you add new entities to your profile, or new entity sub-types to existing entities. This will speed our processing of these requests.

• FCC Form 471 Permissions Verification
  • Verify that full-time users are aware if part-time FCC Form 471 user makes organization changes.

• C2 Budget Tool
  • This tool will show updated C2 budgets the day after you change your profile information.

• School districts with ten or fewer schools
  • We recommend that you enter your student counts individually by school to maximize the number of options available for your C2 budget calculation.
Housekeeping – Q&A

- Use the “Questions” box in your webinar control panel to submit your question in writing.
  - Click the box with the arrow above the questions box to expand it.
  - Ask questions related to webinar content.
Questions?
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Create a customer service case in the E-rate Productivity Center (EPC):

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2. Select the Contact Us link from the upper right menu on your landing page.
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Our next webinar is on: November 18 at 3 p.m. ET

E-rate Post-Commitment Process

Recommended for: Applicants and service providers

E-rate Experience Level: All
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• We appreciate your feedback!
Thank You!