EPC Administrative Window

2022 Applicant and Service Provider Training

October 27, 2022
DISCLAIMER

To accommodate all attendees, real-time closed captions will be present during this presentation. 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.
E-Rate Customer Service Center (CSC)

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 the landing page.
Meet the Team

Tyanna Smith
Associate Manager | E-Rate program

Nkeshi Free
Communications Specialist | E-Rate
AGENDA

- Administrative Window Overview
- User Permissions
- Account Administrator Spotlight
- Parent and Child Entities
- Parent and Child Spotlight
- C2 Replacement Budget
- Additional Notes
Administrative Window Overview
Administrative Window

- The **EPC Administrative Window**, also known as the “Admin Window,” is the period during which applicants can make updates to their profile information in EPC to prepare for the upcoming FCC Form 471 application filing window.
  - It occurs from October to December each year prior to the FCC Form 471 application filing window.
  - Official dates are announced each year in the E-Rate News Brief.
- The Admin Window closes as the FCC Form 471 Filing Window (announced each year) opens.
  - At this point, **EPC profiles are “locked”** preventing any change that would impact an entity’s discount calculation.
What To Update During The Admin Window

Updates applicants make during the “Admin Window” include but are not limited to:

- Student counts for schools and school districts
- National School Lunch Program (NSLP) and/or Community Eligibility Provision (CEP) numbers
- Square footage counts for libraries, kiosks, and bookmobiles
- Consulting firms associated with the entity
- Consortia confirms their member counts
- Confirm account information, account administrator, administrator contact information
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.
User Permissions
EPC Account Administrator Role

• Every organization (independent school, independent library, school district, library system, consortium) with an account in EPC needs an account administrator.
  • The account administrator must be an employee of the BEN’s school or library and cannot be a consultant.
  • For billed entity and service provider accounts, the Account Administrator is tied to their 498 ID. See Applicant 498 and Service Provider 498 pages on our website.
• Consultants and Service Providers also need to create Consultant and Service Provider Accounts and Account Administrators for their EPC accounts.
EPC Account Administrator Permissions

- **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.
Account Administrator Grants User Permissions

- The Account Administrator determines which rights to grant each user.
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 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
Review User Permission Levels

- To review User Permission Levels
  - Log in to EPC
  - From the Landing page, Click Manage Users
  - Click on your BEN and select Add and Remove Existing Users
  - Review the Permission fields and Active field.

- To update user permission levels, add users, or reactivate a deactivated user, please see the EPC Account Administrator Guide.
Account Administrator Spotlight – User Management
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.
Deactivate an Existing User

- From your landing page, select **Manage Users**.
- Select the Organization or Billed Entity name.
- Click **Add and Remove Existing Users**. A list of users appears.
- Review the **Permission** columns and the **Active** column for each user listed.
- To deactivate a user, click on their name. My **User Profile** page opens for that user.
- Click **Related Actions**.
- Click **Deactivate User**.
Please Review Your Profile

• It is important that all users review their information for accuracy each year before filing the FCC Form 471.
  • USAC updates each profile based on the information included in their most recent FCC Form 471. Applicants need to ensure the accuracy of their information prior to filing a new FCC Form 471.
  • Schools, libraries and consortia depend on static student counts to accurately calculate their discounts.
  • For consistency, this information cannot be changed during the application filing window.
• In addition to EPC, all entity profile information can be viewed in the E-Rate Entity Search Tool within Open Data.
Parent and Child Entities
Parent and Child Entities in EPC

USAC uses the terms “parent” and “child” to describe certain relationships in EPC. Where there is a Primary account and an associated subordinate account, the “parent” is the primary account and the “child” is the subordinate account.

The Admin Window is a good time to review and validate the parent child relationship.

The three most common parent-child relationships in EPC are:

- A school district (parent entity) to the individual schools and non-instructional facilities (NIFs) that are part of that school district (child entities).
- A library system (parent entity) to the individual library outlets/branches and NIFs that are part of that library system (child entities).
- A consortium leader (parent entity) to the members of the consortium (child entities).
School District (Parent) and Individual School (Child) Profiles

• 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.
Two Ways Of Reporting Student Count

Reporting a student count for each school in the district is advantageous for school districts and library systems with fewer than ten sites.

Larger school districts may choose to report one number for the entire district.
Update Library System (Parent) and Branch (Child) Profiles

- 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.
Parent and Child Spotlight - Update Entities
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

Notifications

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>Please select a value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding Year</td>
<td>-- Select a Funding Year --</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notification</th>
<th>Description</th>
<th>Issued Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>No items available</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Entities

<table>
<thead>
<tr>
<th>Entity</th>
<th>Entity Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>School District 400100</td>
<td>17308</td>
</tr>
<tr>
<td>School 1 In District 400100</td>
<td>18006</td>
</tr>
<tr>
<td>School 2 In District 400100</td>
<td>18007</td>
</tr>
<tr>
<td>School 3 In District 400100</td>
<td>18008</td>
</tr>
</tbody>
</table>
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

**Notifications**

- **Notification Type**: Please select a value
- **Funding Year**: -- Select a Funding Year --

<table>
<thead>
<tr>
<th>Notification</th>
<th>Description</th>
<th>Issued Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No items available

**My Entities**

<table>
<thead>
<tr>
<th>Entity</th>
<th>Entity Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>School District 400100</td>
<td>17308</td>
</tr>
<tr>
<td>School 1 In District 400100</td>
<td>18006</td>
</tr>
<tr>
<td>School 2 In District 400100</td>
<td>18007</td>
</tr>
<tr>
<td>School 3 In District 400100</td>
<td>18008</td>
</tr>
</tbody>
</table>
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.
C2 Replacement Budget
Requesting C2 Replacement Budget

• Another important activity that takes place during the Administrative window is requesting a Category Two replacement budget. (Please view our recent Fall Training Webinar on Category Two Budgets.)

• If changes occur within your School District that impact the budget calculation of your Library System, Independent School or Independent Library during a five-year funding cycle, you can update your profile information and request that your budget for Category Two equipment and services be updated as well.
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 updated, or replacement budget.

• If the total student count or square footage changes during the five-year funding cycle, applicants may request a C2 budget recalculation. This is referred to as a “replacement C2 budget” request.

• For more information, watch the “Request a C2 Replacement Budget” video.
Budget-Impacting Changes

• Examples of changes that may require a C2 Replacement Budget include:
  • Adding or removing dependent entities to/from the school district or library system.
  • Updating student count or square footage of C2 budget calculation method (aggregated calculation or individual calculation).
  • Updating individual school or library student count or square footage.

Note - 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 request a C2 replacement 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.

<table>
<thead>
<tr>
<th>Student Count</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>262</td>
<td>N/A</td>
</tr>
<tr>
<td>818</td>
<td>N/A</td>
</tr>
<tr>
<td>2604</td>
<td>N/A</td>
</tr>
<tr>
<td>935</td>
<td>N/A</td>
</tr>
</tbody>
</table>

registration Number
Requesting a Replacement Budget – Entity Related Action

- Go to the budgeted entity’s Related Actions and select Request Replacement Category Two Budget.

- Upload Entity Profile Data
  This function allows you to bulk upload your child schools details.

- Create Appeal
  This function allows you to submit an appeal

- Create SPIN Change Request
  Action to initiate a SPIN change request.

- Create Service Substitution Request
  Action to initiate a Service Substitution request.

- Create FCC Form 500
  This function allows you to create an FCC Form 500 for your entity.

- Invoice Deadline Date Extension Request
  Request an extension to the invoice deadline for one or more funding requests.

- Request Replacement Category Two Budget
  Request an update to the C2 budget established by a prior C2 FCC Form 471 in the same budget cycle.
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

<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>
<tbody>
<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>

[REQUEST REPLACEMENT BUDGET] [CANCEL]
# 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>
<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>
<tbody>
<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] [REMOVE REPLACEMENT BUDGET]
Requesting C2 Replacement Budget Notes

- Consortium entities may not request replacement budgets for their members.
- Educational Service Agencies can only request a replacement budget for their own entity, not other associated members.
- Once an entity certifies an application, it needs to submit a Receipt Acknowledgment Letter (RAL) Request to request a replacement C2 budget.
Additional Notes
Administrative Window Tips

- Contract records can be created after the admin window closes.
- **RAL Modifications** should be filed 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 should reside with users who can make organization changes.
- **C2 Budget Tool** shows 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?
E-Rate Customer Service Center (CSC)

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 the landing page.
UPCOMING WEBINARS

Our next webinar is on: November 3 at 2 p.m. ET

E-Rate Post-Commitment Process

Recommended for: Applicants and service providers

E-Rate Experience Level: All

Go to the E-Rate Webinars page for additional information.
Take Our Survey

- We want to hear about your webinar experience.
- A survey will appear on your screen at the end of the webinar.
- If you are not able to complete the survey today, one will be emailed to you within one to two business days.
- We appreciate your feedback!
Thank You!