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# **Housekeeping - Webinar Panel**

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Use the white arrows to open the sections in the panel.



# **Housekeeping - Webinar Panel**

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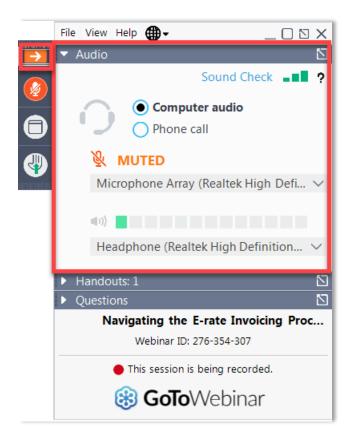


We are not using the hand raise function.



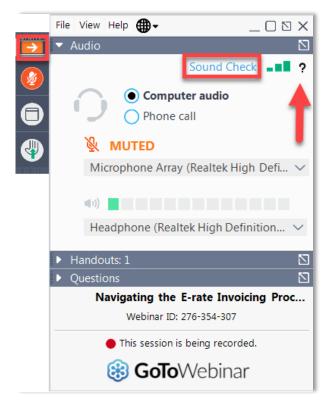
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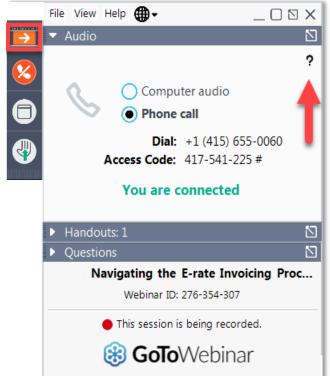
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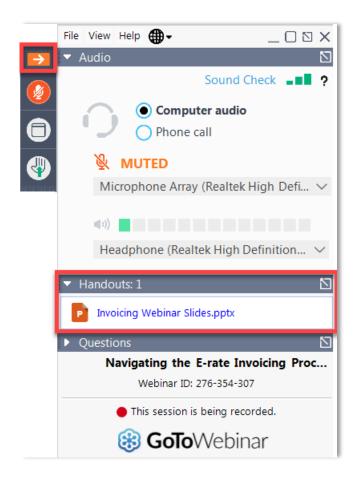
- Use the "Sound Check" link and click question mark icon for audio help.
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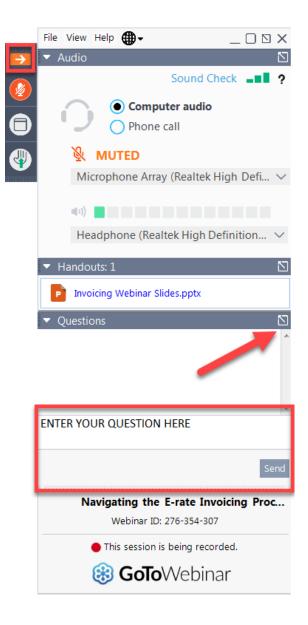
## **Housekeeping - Resources**

- 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.



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#### **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 <u>Applicant 498</u> and <u>Service Provider 498</u> pages on our website.
- Consultants and Service Providers also need to create Consultant and Service Provider Accounts and Account Administrators for their EPC accounts.

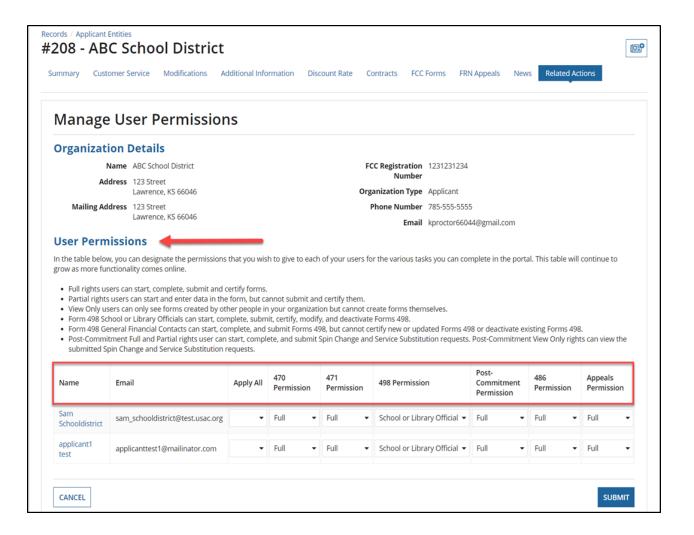
#### **EPC Account Administrator Permissions**

#### 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

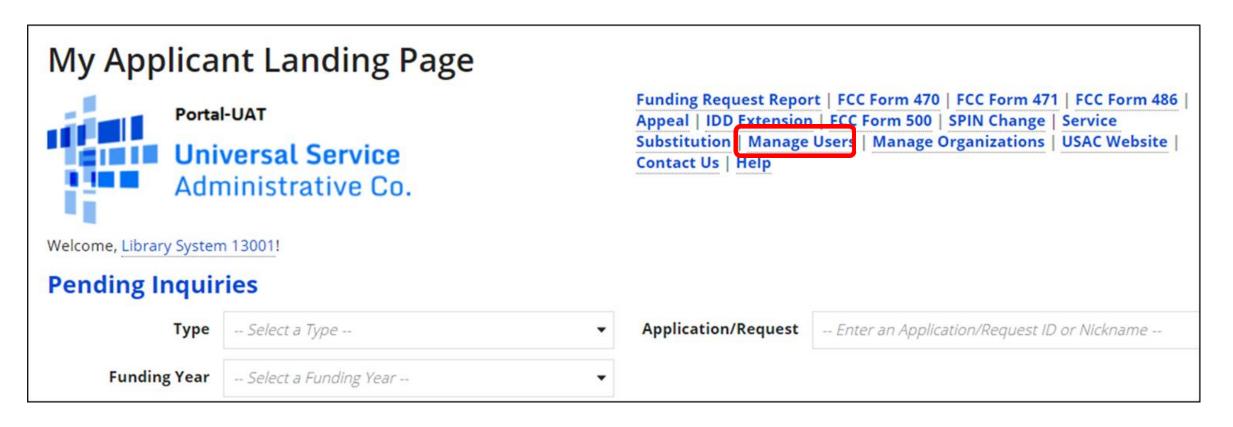
#### **Review User Permission Levels**

- 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 <u>EPC Account Administrator Guide</u>.

# **Account Administrator Spotlight - User Management**

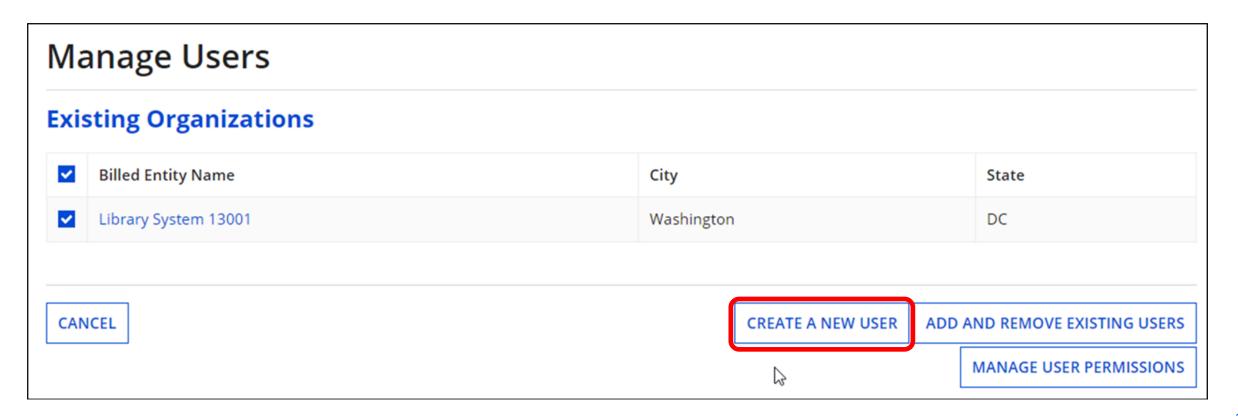
#### **Create a New User**

• From your landing page, choose Manage Users.



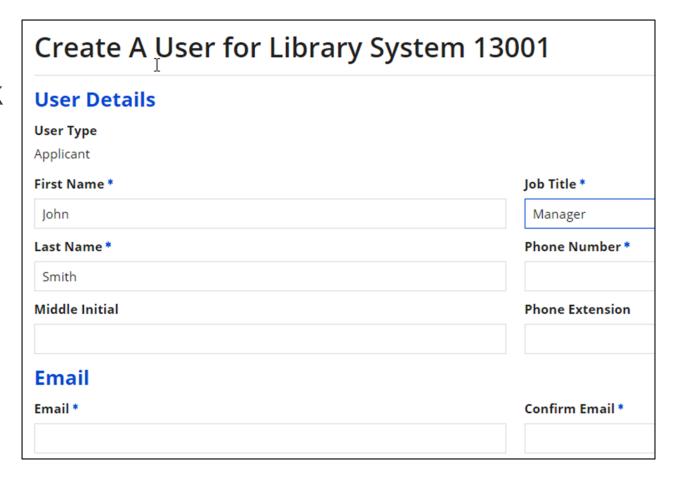
#### **How to Create a New User**

• From the Manage Users screen, select your entity, then Create a New User.



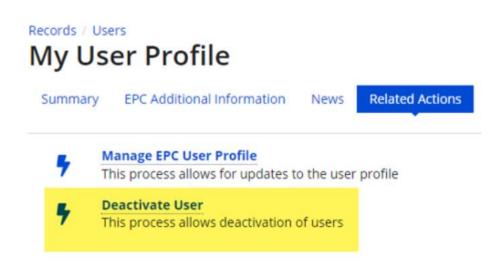
#### **How to Create a New User**

- 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 <u>E-Rate Entity</u> <u>Search Tool</u> within <u>Open Data</u>.

# **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**

# Category Two (C2) Budget Information We calculate your Category Two budget and your discount rate separately, and so we collect separately budget cycle, so this number needs to be updated less frequently than the student count for your of the How does the district report its student count for Category Two budget? One number for my whole district Sum of Student Counts of all Schools in the District School Information Category To We calculate your obudget cycle, so the How does the district budget cycle, so the How does the district on the District budget cycle, so the How does the district budget cycle and the How does the district budget cycle and the How does the district budget cycle and the How does the

Larger school districts may choose to report one number for the entire district

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

#### **Category Two Budget Information**

We calculate your Category Two budget and your discount rate separately, and so we budget cycle, so this number needs to be updated less frequently than the student co

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

District Student 33682 Count

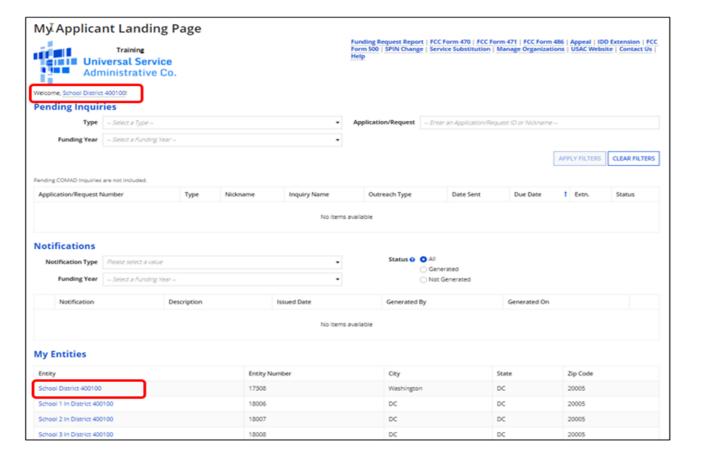
#### **Update Library System (Parent) and Branch (Child) Profiles**

- 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**

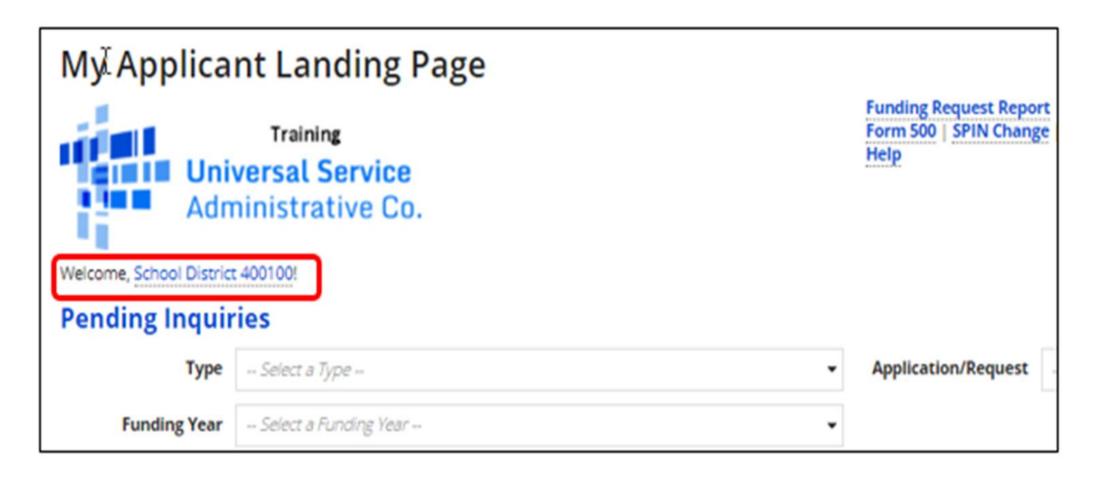
## **How to Update a Parent Entity Profile**

 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.



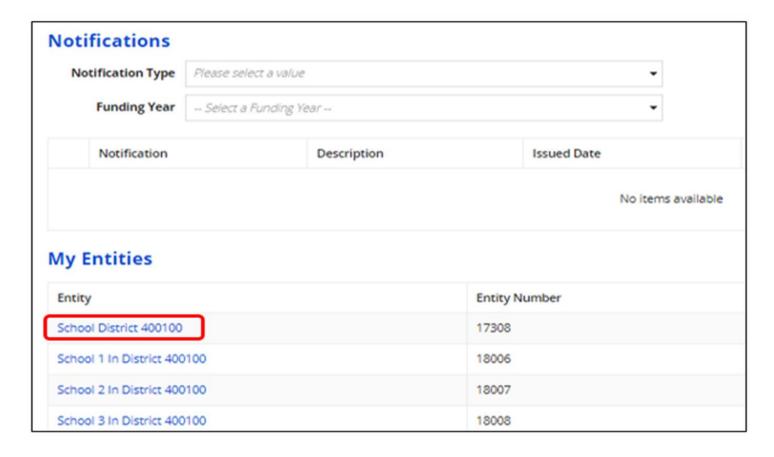
# **How to Update a Parent Entity Profile**

Parent entity name – detail 1 to locate parent entity name



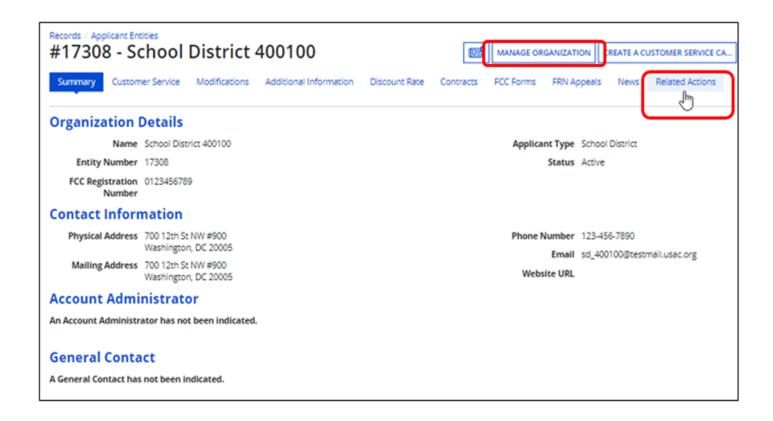
# **How to Update a Parent Entity Profile**

Parent entity name – detail 2 to locate parent entity name



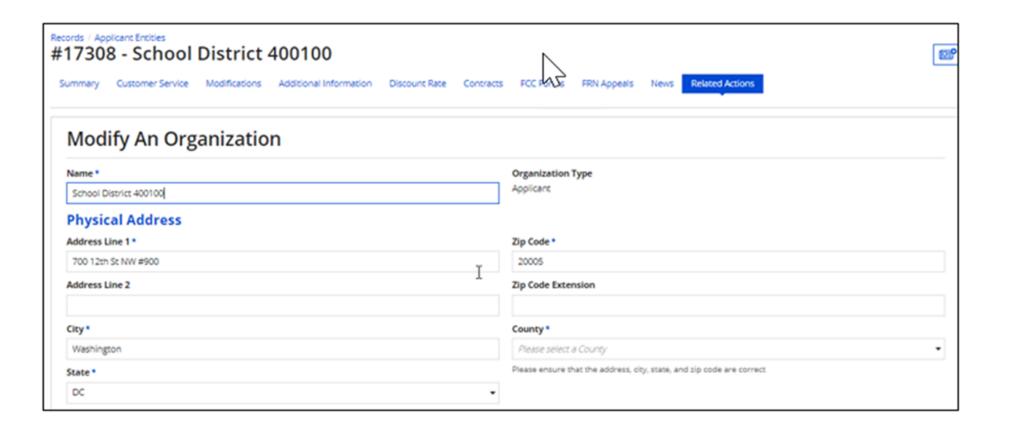
### **How to Update a Parent Entity Profile**

- 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.



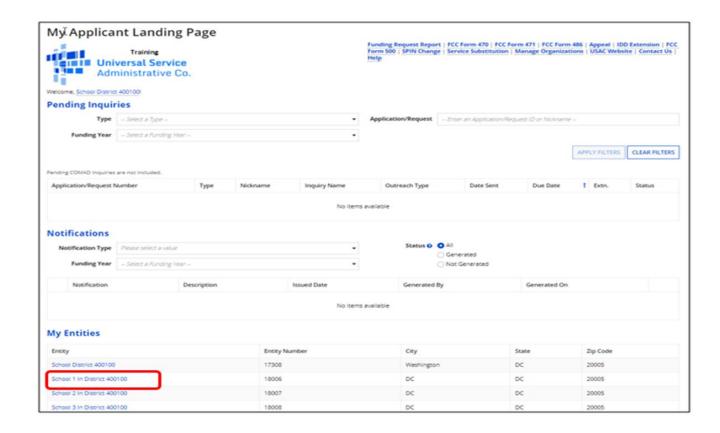
### **How to Update a Parent Entity Profile**

• You can then update many of the fields in the organization's entity profile.



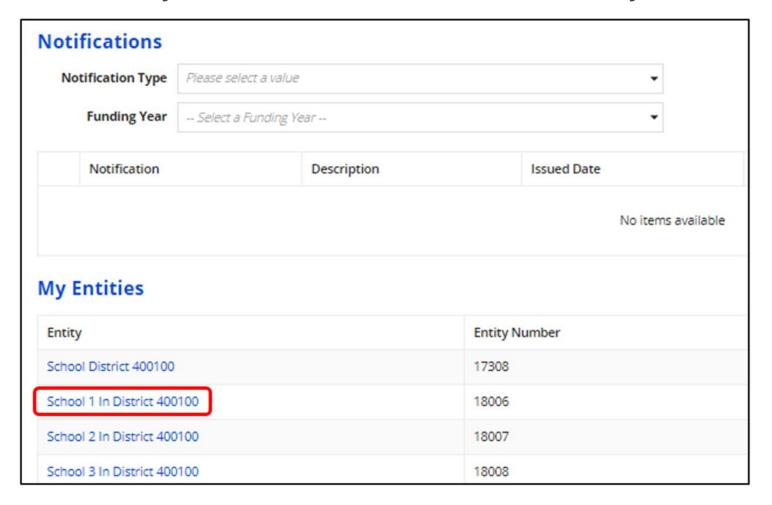
### How to Update a Child Entity Profile

• 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.



# **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 <u>Fall Training Webinar</u> 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

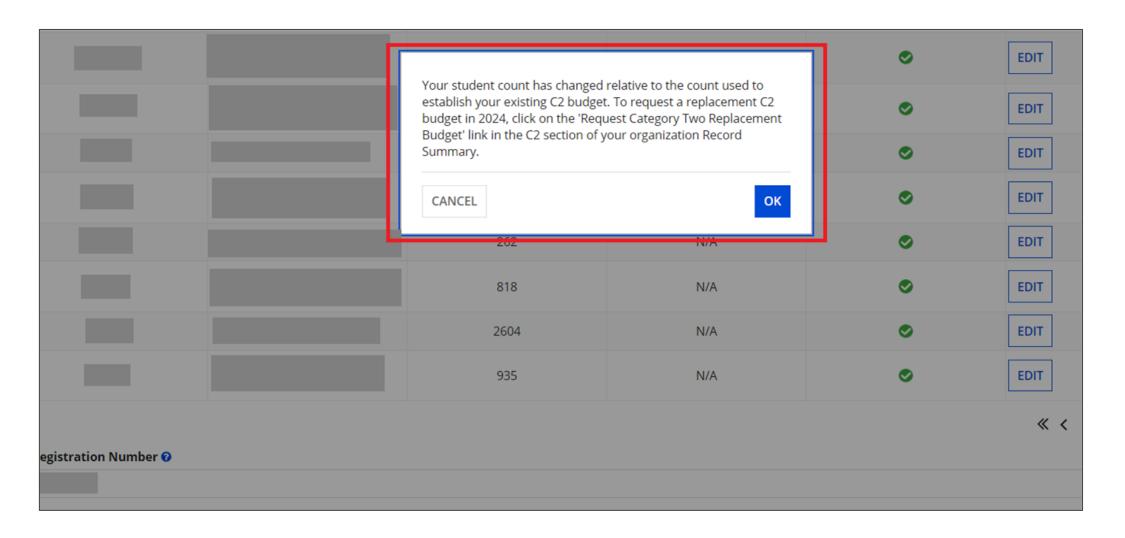
## Requesting C2 Replacement Budget

- 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



### Requesting a Replacement Budget - Entity Related Action

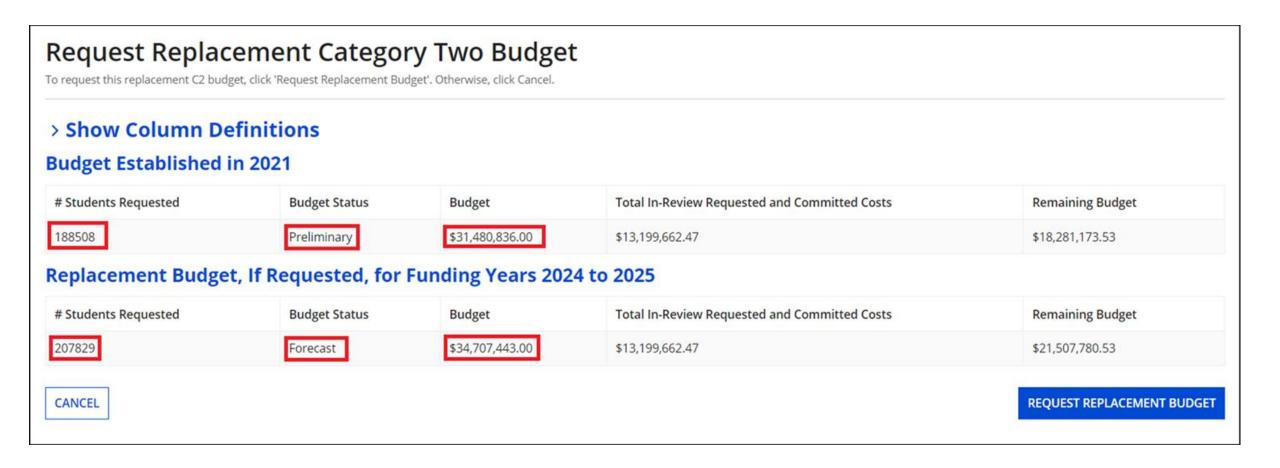
 Go to the budgeted entity's Related Actions and select Request Replacement Category Two Budget.

- 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



### 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**

# Students Requested	Budget Status	Budget	Total In-Review Requested and Committed Costs	Remaining Budget
188508	Preliminary	\$31,480,836.00	\$13,199,662.47	\$18,281,173.53

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

# Students Requested	Budget Status	Budget	Total In-Review Requested and Committed Costs	Remaining Budget
207829	Forecast	\$34,707,443.00	\$13,199,662.47	\$21,507,780.53

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.

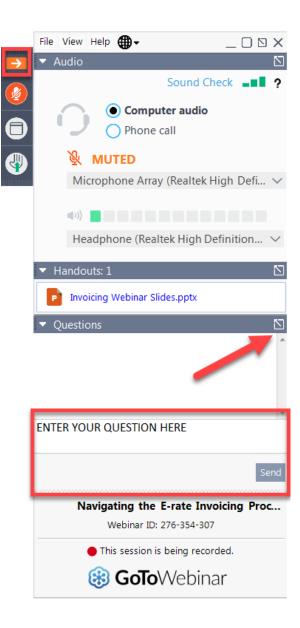
# **Additional Notes**

### **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
- <u>C2 Budget Tool</u> 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

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# **Questions?**

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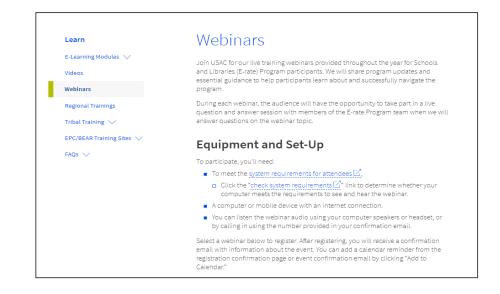
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Our next webinar is on: November 3 at 2 p.m. ET

**E-Rate Post-Commitment Process** 

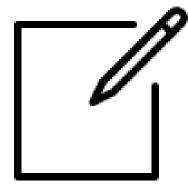
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