# EPC Administrative Window

## October 19, 2023

**Universal Service**
Administrative Co.

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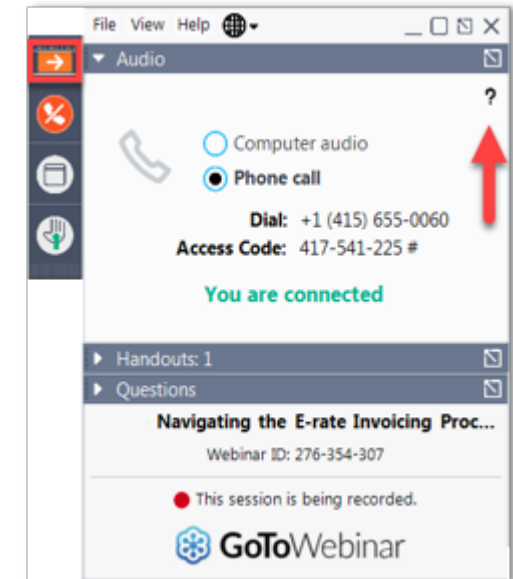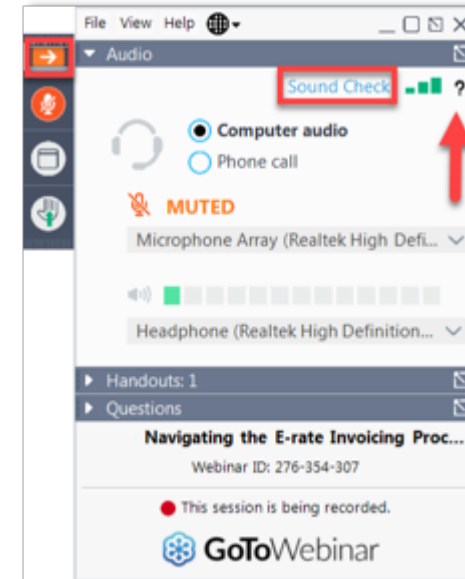
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- Tips for submitting questions:
  - Use the **Questions** box in your webinar control panel anytime during the presentation.
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  - Write in full sentences.
  - Ask one question at a time.
  - Ask questions related to today's 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



## Derrick Harrison

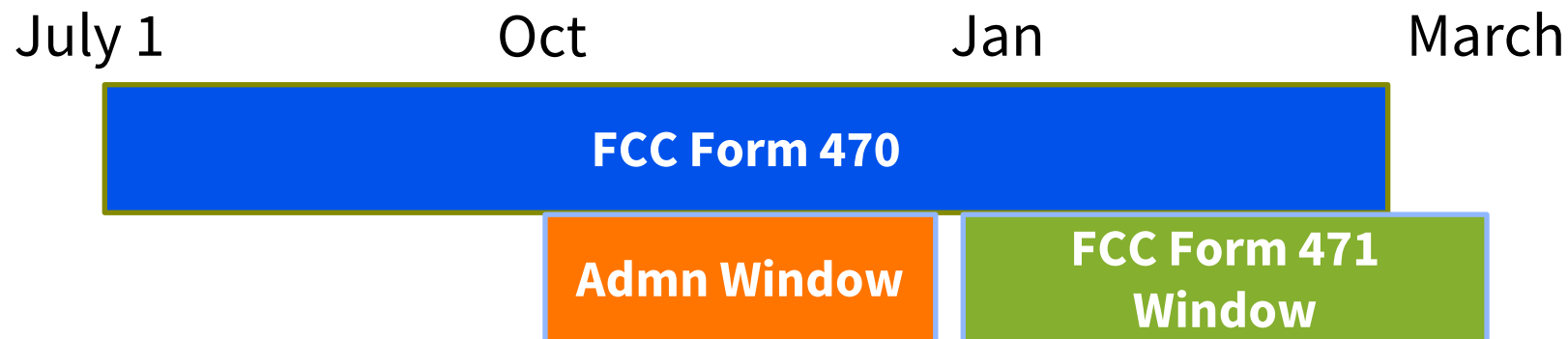Program Analyst | E-Rate



## Tyanna Smith

Associate Manager | E-Rate

# AGENDA

- What is the Administrative Window?

- Why do we have an Administrative Window?

- What changes do I make during the Administrative Window?

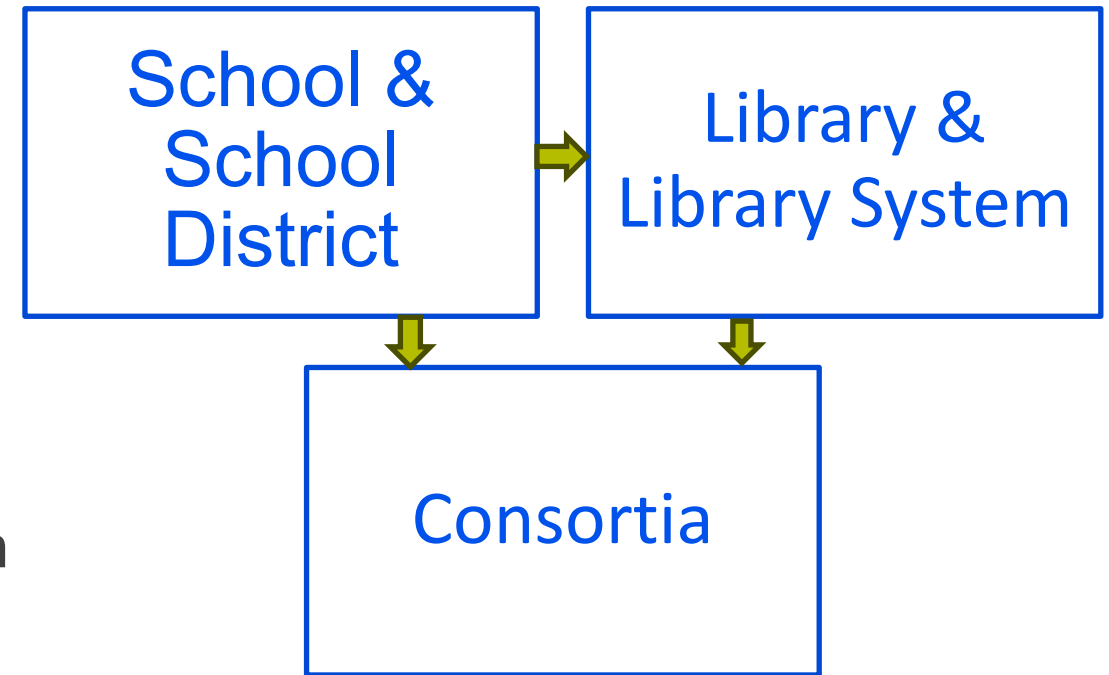- Administrative Window tips

- Additional Resources

# What is the Administrative Window?

- Time when applicants update EPC entity profile information for the FCC Form 471 application  window

  - Occurs from October to early January prior to the FCC Form 471 application filing window

  - Official dates are announced each year in the E-Rate News Brief: FY24 opens on October 24, 2023

- Closes as the FCC Form 471 Filing Window opens:

  - **EPC profiles are "locked"** preventing changes that impact an entity's discount rate

July 1                    Oct                    Jan                    March

**FCC Form 470**

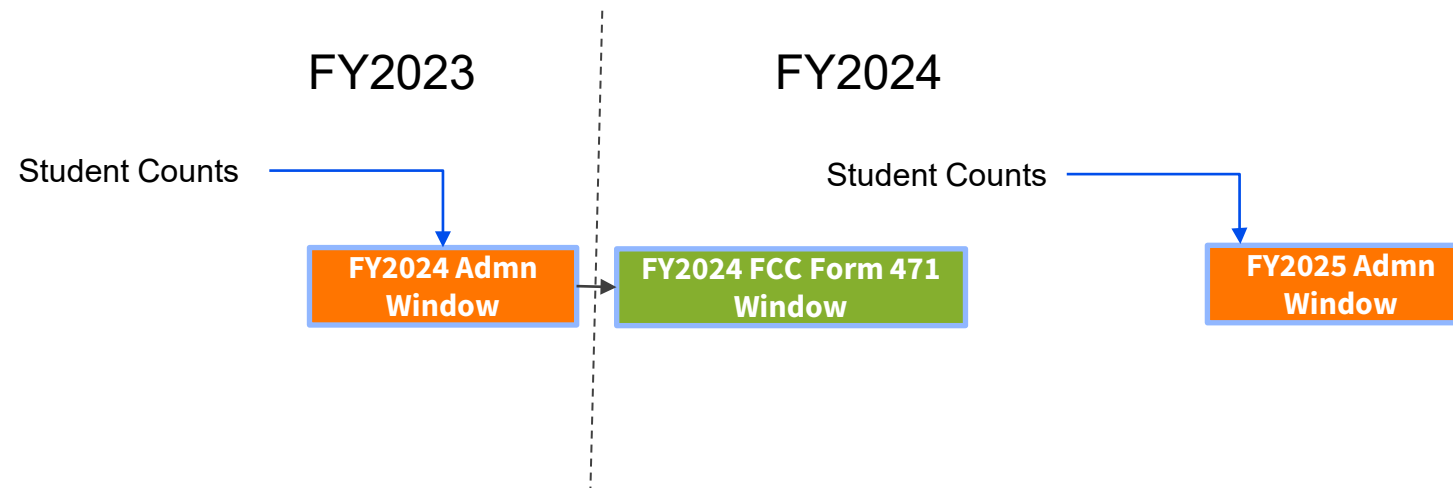**Admn Window**          **FCC Form 471 Window**

# Why Do We Have Administrative Window?

- Ensures consistent data for each FCC Form 471 by applicant including:
  - NSLP and full-time student counts
  - Discount rate
  - Entities tied to a school district, library system, or consortia

- Eliminate the need to add student count changes to your FCC Form 471 at submission or during PIA review

- Allows updates to be made via self-service except for new entities

School & School District → Library & Library System

↓ ↓

Consortia

# Updating Student Counts

- Students counts from approved FCC Form 471 are updated in the EPC entity profile prior to the Administrative Window

- Recommend you update your students counts based on the most recent data you have during the Administrative Window

- If you receive National School Lunch Program (NSLP) and full-time student counts after the Administrative Window closes, use them for the next Funding Year

- Request a revised C2 budget if necessary. Only changing your profile in EPC won't reset your C2 budget. Steps for how to request a budget recalculation in EPC is shown [here](#) and in the appendix of this deck.

FY2023      FY2024

Student Counts

Student Counts

| FY2024 Admn Window | → | FY2024 FCC Form 471 Window | | FY2025 Admn Window |

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# What Changes to Make?

| | Schools / School Districts | Libraries and Library Systems | Consortia |
|---|:---:|:---:|:---:|
| Applicant Account Administrator & all user permissions (including invoicing)* | X | X | X |
| Update/add consulting firm (CRN) | X | X | X |
| Add new or close entities via a customer service case | X | X | X |
| Update entity relationships (child entities, consortia members) | X | X | X |
| Update student counts / library square footage; update entity subtypes | X | X | |
| Update entity contact information, FCC registration number | X | X | X |
| Request an increase to your Category 2 budget | X | X | |

*User permissions can be updated at any time by the Account Administrator

# 2020 Census Urban-Rural Updates

- USAC will update the urban-rural designation of E-Rate schools and libraries prior to the opening of the FY24 Administrative Window

- Small portion of applicants will see a change in their urban-rural status

- USAC will contact applicants with discount changes

- Depending on your discount level and % of entities rural-urban, there may be no impact on your discount rate

| Income  Measured by percentage of students eligible for NSLP | Urban Status Discount Rate | Rural Status Discount Rate |
|---|---|---|
| Less than 1% | 20% | 25% |
| 1% to 19% | 40% | 50% |
| 20% to 34% | 50% | 60% |
| 35% to 49% | 60% | 70% |
| 50% to 74 % | 80% | 80% |
| 75% to 100% | 90% for C1, 85% for C2 | |
|  | Tribal Libraries: FY23 and earlier: 90% for C1, 85% for C2 FY24 and later: 90% C1 & C2 | |

- National School Lunch Program (NSLP), Category One (C1) Services, Category Two (C2) Services
- The maximum discount rate for FY2024 and later C2 goods and services was increased by the FCC in FCC 23-56 from 85% to 90% for tribal libraries with NSLP percentages between 75-100%

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# Indicating Tribal Status

- There is a new entity subtype for Tribal College/University Library based on the recent FCC order

- Entities with the following Tribal subtypes will be asked to provide their Tribal Affiliation based on a dropdown menu:
  - Tribal library
  - Tribal school
  - BIE (Bureau of Indian Education)

- If one of the entity subtypes above are selected and the school or library does not meet the new definition of Tribal under the FCC order, we recommend you deselect the entity subtype accordingly

- Tribal entity eligibility will be reviewed as part of the FCC Form 471 application review process in FY24

**Library Sub-Type**
- ☑ Public Library
- ☐ Private Library
- ☐ Academic
- ☐ Research
- ☑ Tribal Library
- ☐ Bookmobile
- ☐ Kiosk
- ☐ New Construction Library
- ☑ Main Branch
- ☐ Tribal College/University Library (for public use)
- ☐ State Library Agency - Library

**Tribal Affiliation** *
Akiachak Native Community

🔍 Search

- Akiachak Native Community
- Akiak Native Community
- Alabama-Coushatta Tribe of Texas
- Alabama-Quassarte Tribal Town
- Alaska Native Corporation
- Alatna Village
- Algaaciq Native Village (St. Mary's)

# E-Rate Entity Search Tool

- Tool available in open data so you can view and download entity data

- Once you make updates to entities in EPC the data will show in the tool the next day

## E-Rate Entity Search Tool

The E-Rate Entity Search Tool enables the search of E-Rate Productivity Center (EPC) information about schools, libraries, school districts, library systems, consortia, and non-instructional facilities (NIFs). For Annexes information, please refer to the "E-Rate Supplemental Entity Information: Annexes" dataset.

Watch the video walkthrough to learn how to use the tool.
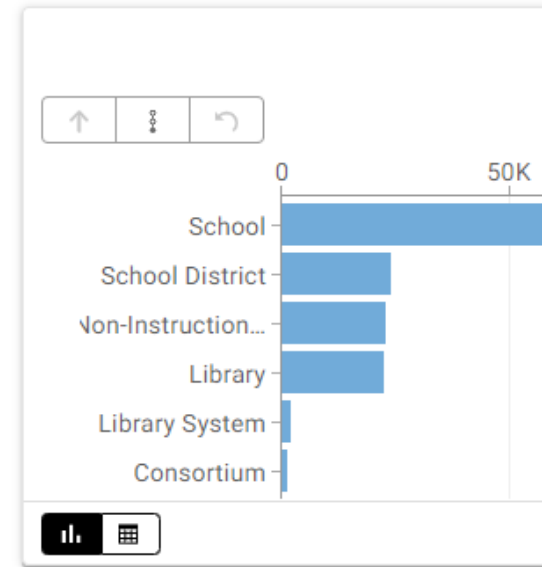
# Additional Resources
- Account Administrator Role
- User Rights
- Parent/Child Relationships
- Updating Entity Profile Data
- Updating C2 Budget Data

# 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

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# 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.

# 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.

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# 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 separ[...] budget cycle, so this number needs to be updated less frequently than the student count for your [...]

**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**

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**School Information**

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 c[...]

**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 Count** 33682

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

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# 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.

# 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

- 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

- From the child entity profile, click **MANAGE ORGANIZATION.**

  - You can then update the child entity in the same way you updated the parent entity.

# 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.

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.

CANCEL          OK

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# 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**

| # 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

**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**

| # Students Requested | Budget Status | Budget | Total In-Review Requested and Committed Costs | Remaining Budget |
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| 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.

# Administrative Window Tips

- Start early and do not wait until the last minute!

- Ensure your Account Administrator is active

- Leverage EPC self-service capabilities

- Request new entities via customer service case early in the window

- Leverage the open data tool to review existing and updated entity data

- Set yourself up for success for FCC Form 471 application window

- Help us help you!

# Housekeeping Q & A

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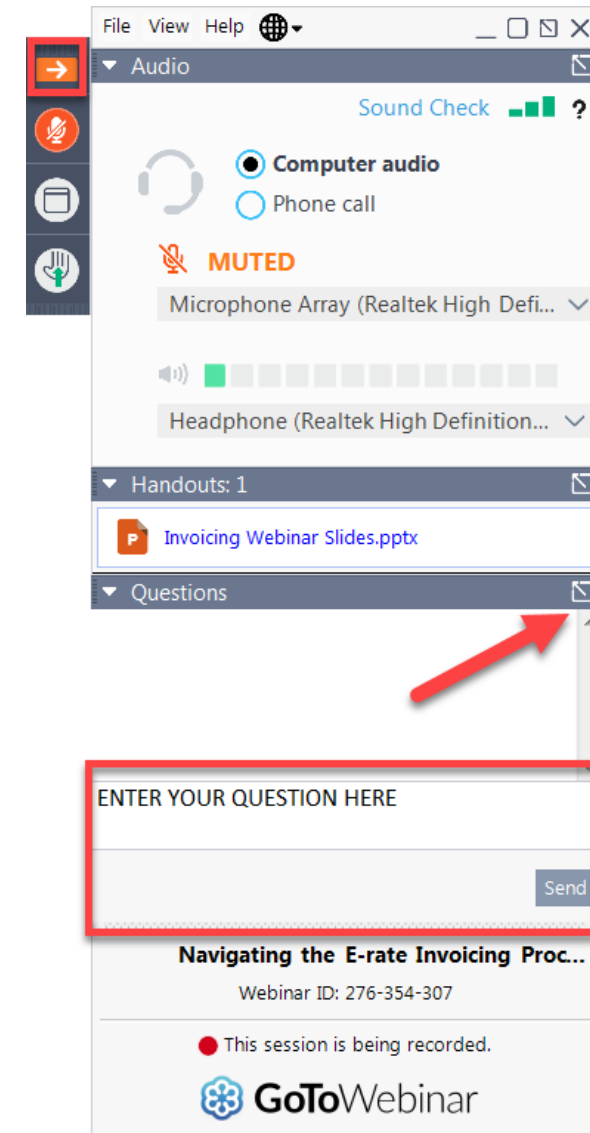
# Questions?

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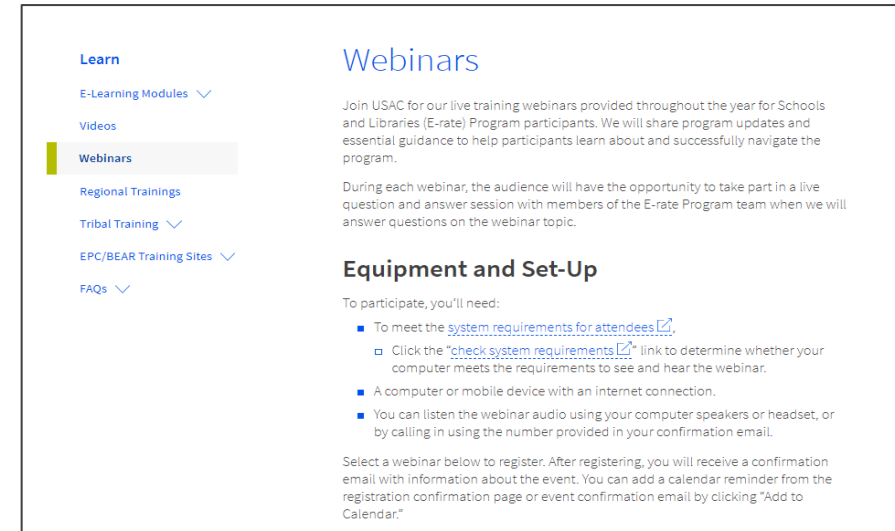
# Upcoming Webinars

**Our next webinar is on: November 7 at 2 p.m. ET**

**Post Commitment**

**Recommended for:** Applicants and service providers

**E-Rate Experience Level:** All



Go to the E-Rate **Webinars** page for additional information.

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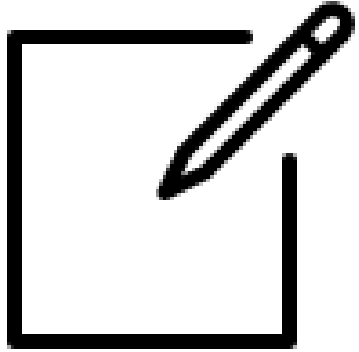
- We want to hear about your webinar experience.

- 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 two business days.

- We appreciate your feedback!

# Thank You!