EPC Administrative Window

October 13, 2023

Universal Service
Administrative Co.

Meet the Team

Tom Nesbitt

Director | E-Rate

Tyanna Smith

Associate Manager | E-Rate

AGENDA

- What is the Administrative Window?

- Why do we have an Administrative Window?

- What changes can 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
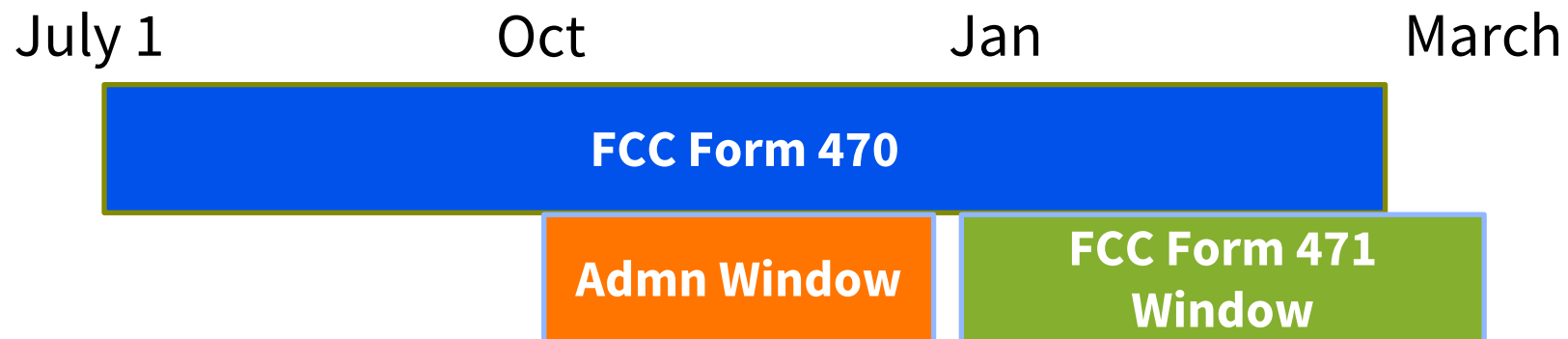
FCC Form 471 Window

Why Do We Have Administrative Window?

- Ensures consistent and accurate 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

- Reduce 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

↓ ↓
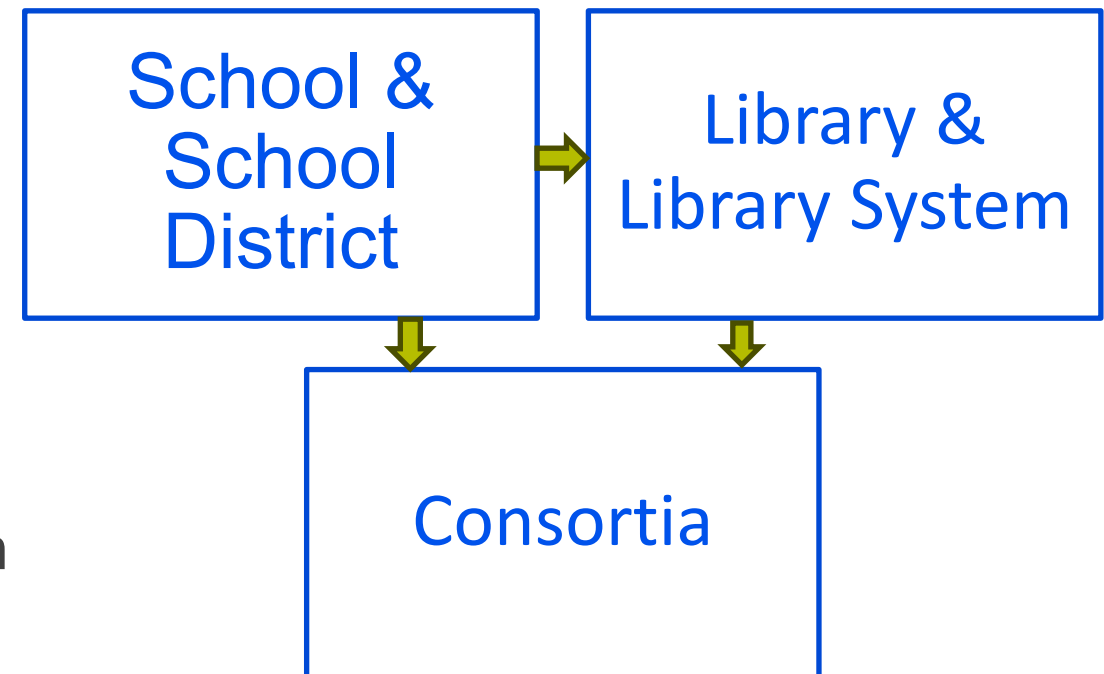
Consortia

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

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.

CY2023   CY2024

Student Counts   Student Counts

FY2024 Admn Window   →   FY2024 FCC Form 471 Window   FY2025 Admn Window
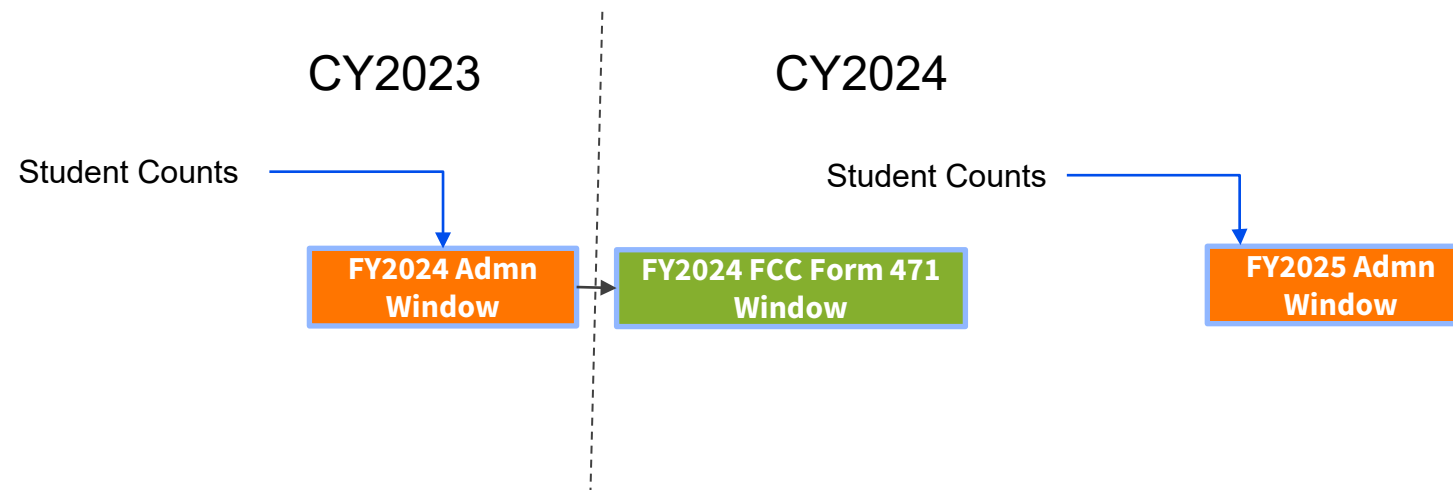
2020 Census Urban-Rural Updates

- 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%

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

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.
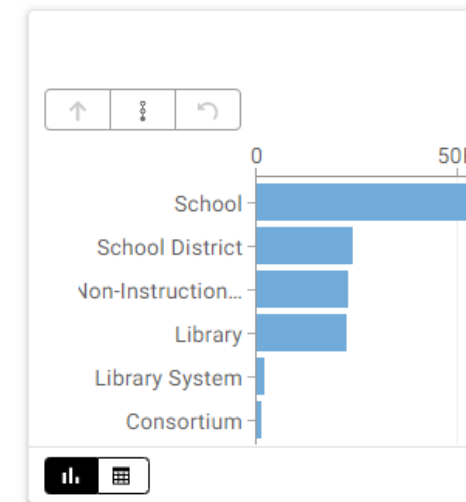
Administrative Window Tips

- 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!

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 access 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.

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

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 (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

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 from bookmobiles and kiosks. A bookmobile or kiosk without square footage added 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

On Landing Page, parent entity name is displayed—

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.

- Due to the recent order, tribal libraries may see an increase in their C2 discount rate and their C2 budget if their total budget was below $55,000.

  - USAC will automatically implement this increased budget floor for entities designated as a tribal library in their EPC profile before the Admin Window opens.
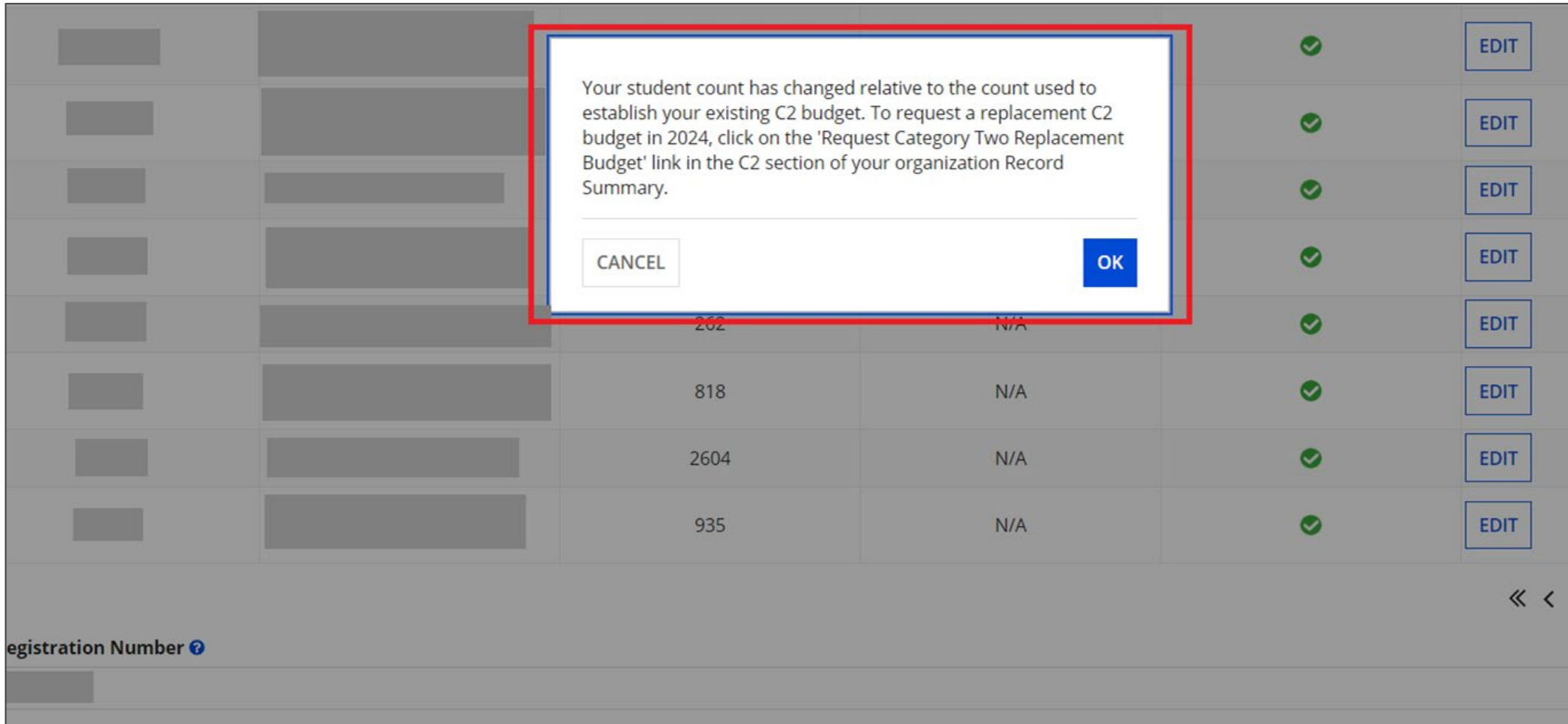
Budget-Impacting Changes

- Examples of changes that you may want to consider when deciding whether to request 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**.

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

Questions?

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.