# Updating Your EPC Profile for FY2022 During the Administrative Window



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# The Basics



#### What is the Administrative Window?

The Administrative Window is a designated timeframe for applicants to update EPC profiles in preparation for the upcoming FCC Form 471 Application Filing Window. Once the Administrative Window closes, profiles are locked down for use by all applicants.

During the Administrative Window, independent schools and school districts must update their EPC profiles with student count data (enrollment and NSLP numbers) and must make any organization relationship changes such as the list of schools belonging to a district.

Student count data is reported for two purposes:

- 1. to calculate your E-Rate discount
- 2. to calculate your Category 2 Budget

It is extremely important that you make your profile updates during the Administrative Window as it is generally impossible to do so once the window closes.

FY2022 Administrative Window:
October 26, 2021 - TBD (just before the FY2022 Form 471 Window Opens)



# What if my district's organizational structure has changed?

Contact the state E-Rate coordinator for assistance in the following situations:

- A school district has split: schools that have left one school district will need to be detached and moved to their new district
- School districts have merged:
   schools will need to be attached to their new parent school district
- A new school has opened:

  a new billed entity number will need to be created for any new schools

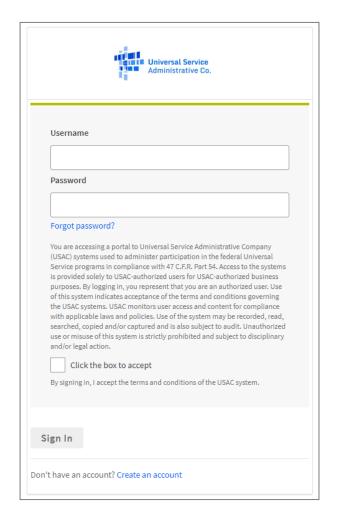
#### **Maine State E-Rate Coordinator for Schools:**

Anne Perloff (207) 581-3584 anne.perloff@maine.edu





- 1 Navigate to https://forms.universalservice.org/portal
- 2 Log into One Portal with your username (your full email address) and One Portal password



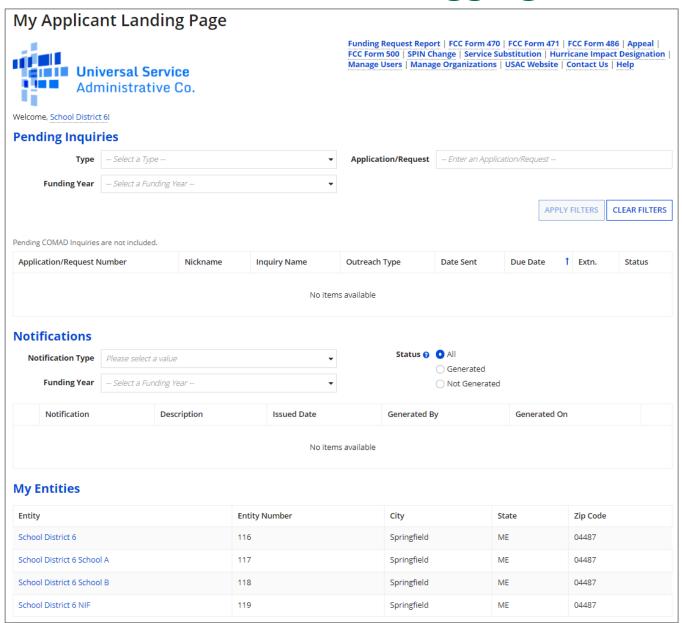


Slide 8

- 3 Complete the steps as prompted to obtain and enter a one-time verification code
- 4 Once you have successfully logged into One Portal, access EPC either through the
- A pop-up (click on the "Continue" button) or
- B the dashboard (click on the block for EPC)

**NOTE:** which one you see is Sign Out dependent on whether you only anne.perloff@maine.edu V have access to EPC with your email Dashboard address or if that email address Upcoming Dates Schools and Libraries Help? also has been given BEAR access No upcoming dates found. Send us a message E-rate Productivity Center (EPC) - E-rate Program Click here participants use the E-rate Productivity Center to manage program processes, receive notifications and to contact Call us (888) 641-8722 Make Your Selection FCC Form 472 (BEAR) - Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount amount of the eligible products or services that the applicant has received and paid for in full. Select Continue to go to your program's system. Select Manage My Authentication Settings to update either your email address or phone number to access your account. ©2020 Universal Service Administrative Company. All rights reserved. Continue Manage My Authentication Settings

Your EPC Landing Page will display





# **School Districts**



# What data should districts update?

School districts report student counts for two purposes:

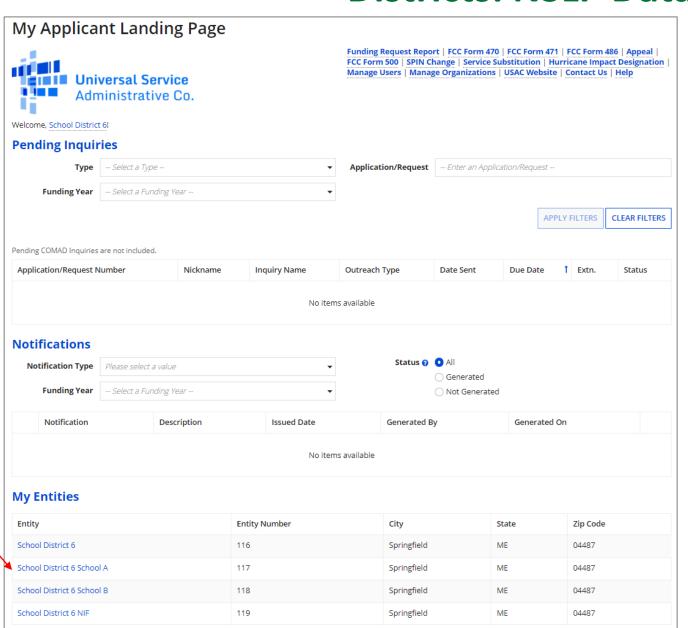
- 1. To calculate your district's E-Rate discount percentage → REQUIRED ANNUALLY ←
  - entered on the summary page for each school in your district
- 2. To update data for your district's Category 2 Budget
  - → REQUIRED FIRST YEAR APPLYING FOR C2 1←
  - → OPTIONAL SUBSEQUENT YEARS 1←
    - either entered per school or as an aggregate
      - if your district has 10 or fewer sites: enter C2 data for each school
      - if your district has 11 or more sites: enter C2 data as an aggregated, single number for the entire district
  - you only need to update these student counts once for your 5 Year C2 Budget
    - If you previously entered budget data for the FY2021 FY2025 cycle, you are not required to update it
    - If you wish to if your student data has fluctuated to your benefit, such as an increased student enrollment – you may request to update your district C2 budget data



# School Districts: Updating NSLP Data in the EPC Profile

→ REQUIRED ANNUALLY +

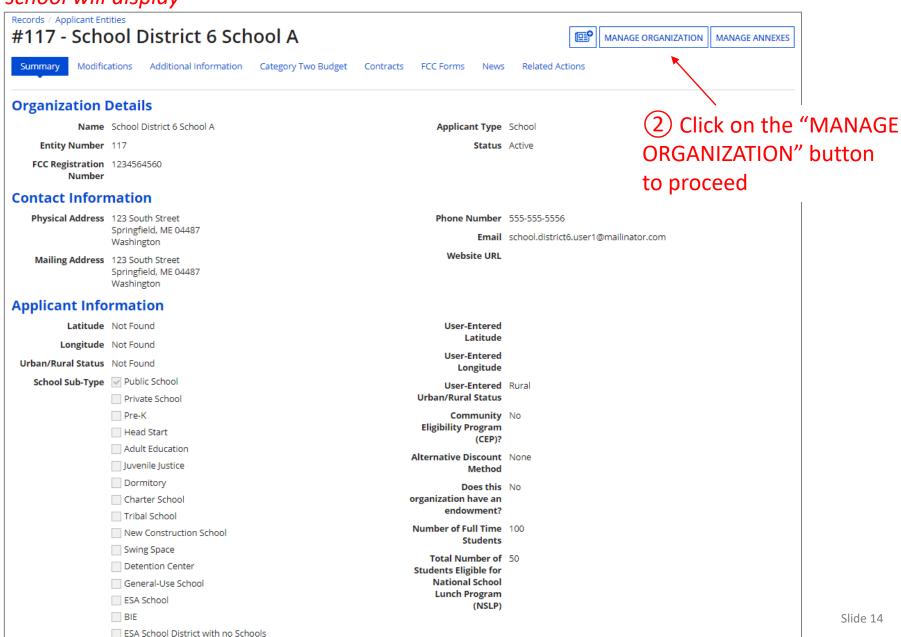




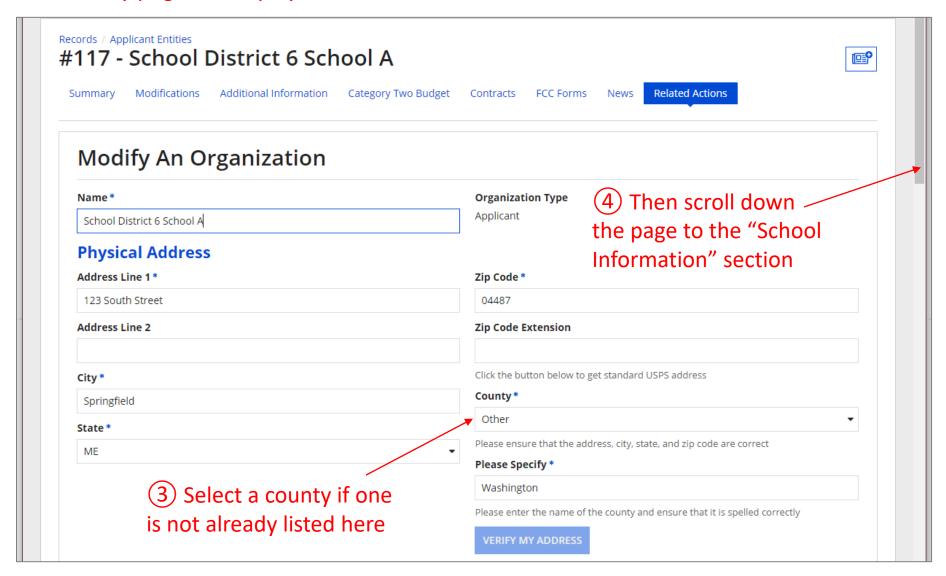
① On the Landing Page, scroll to the "My Entities" section and click on the link for the first school to be updated



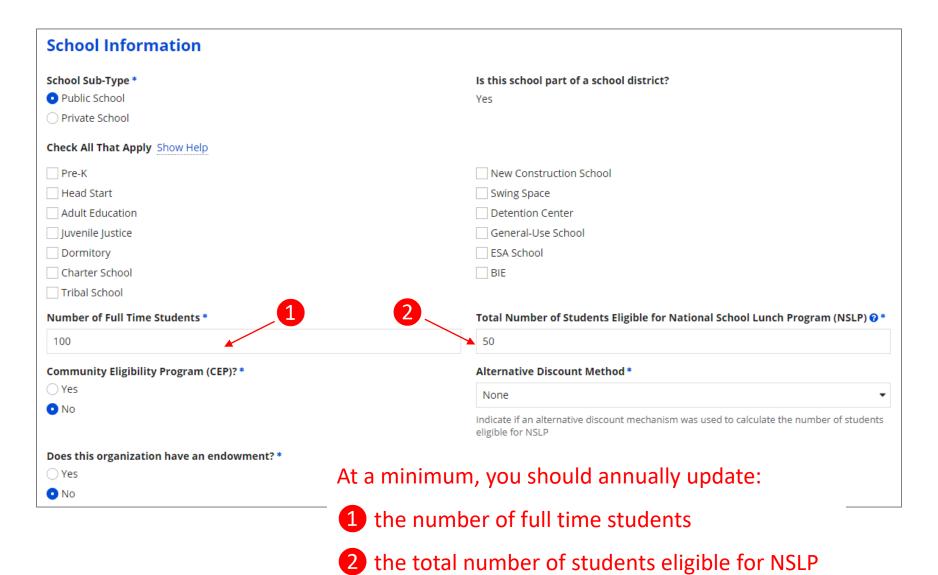
#### The summary page for that school will display



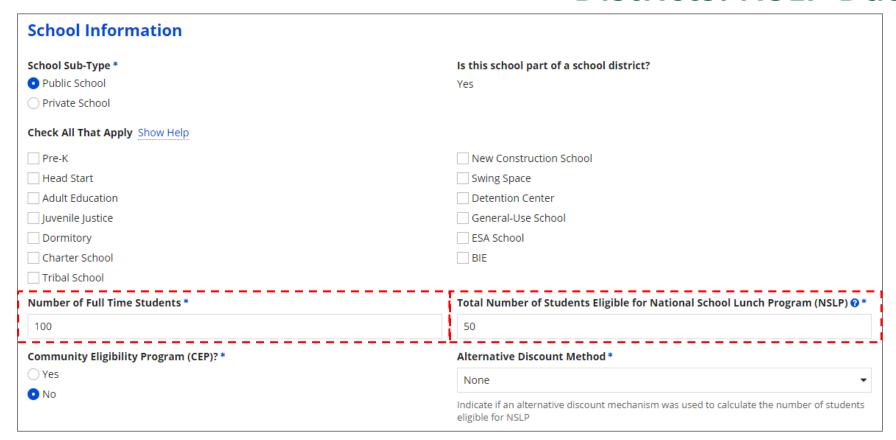
# An editable version of the summary page will display







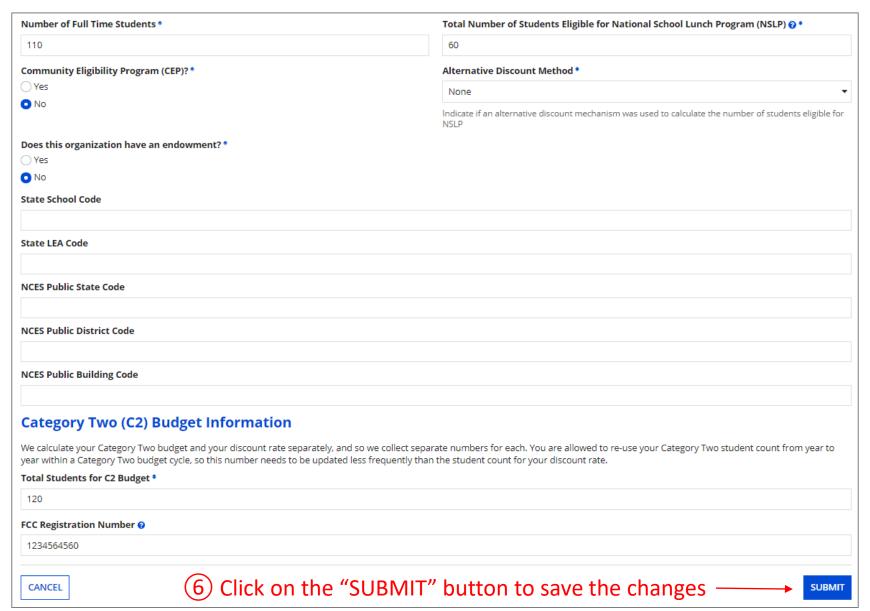




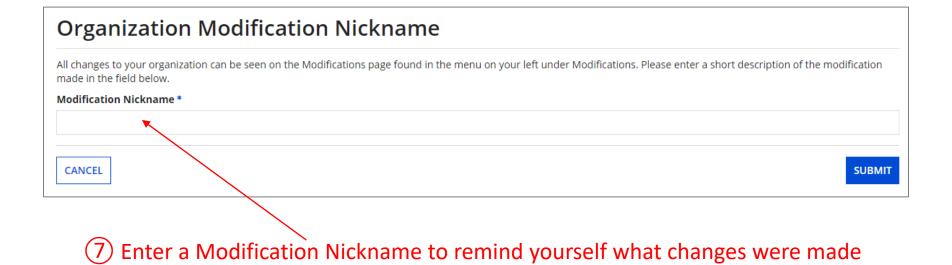
(5) Edit the fields for the "Number of Full Time Students" and the "Total Number of Students Eligible for National School Lunch Program (NSLP)"

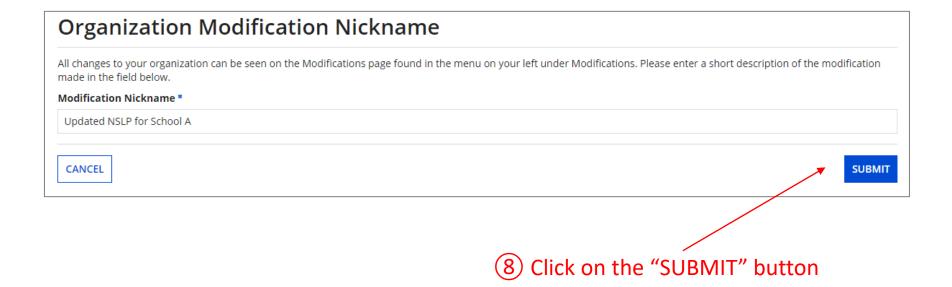
For best results, use the numbers reported to the Maine State Department of Education for the current academic year. During PIA review, USAC will validate your discount by comparing your profile data to DoE data.

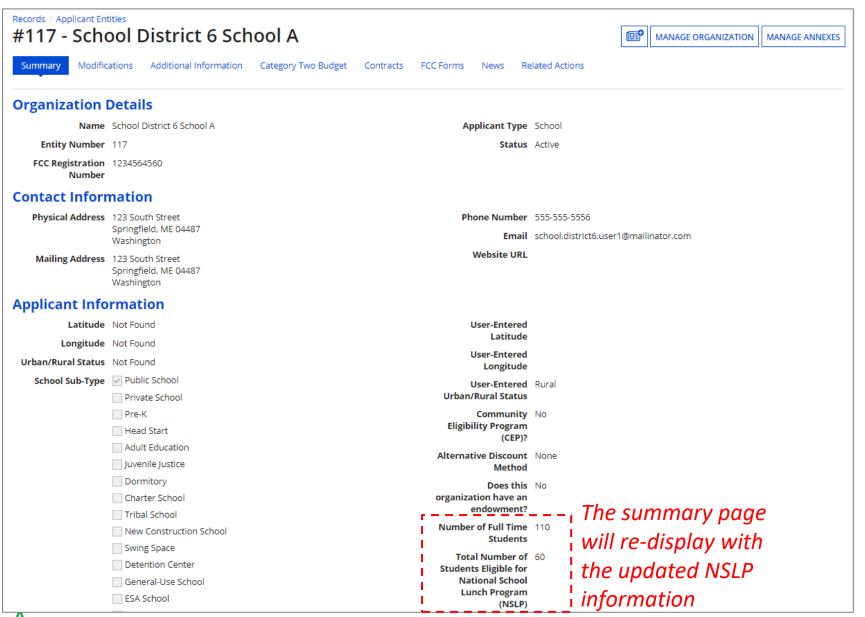


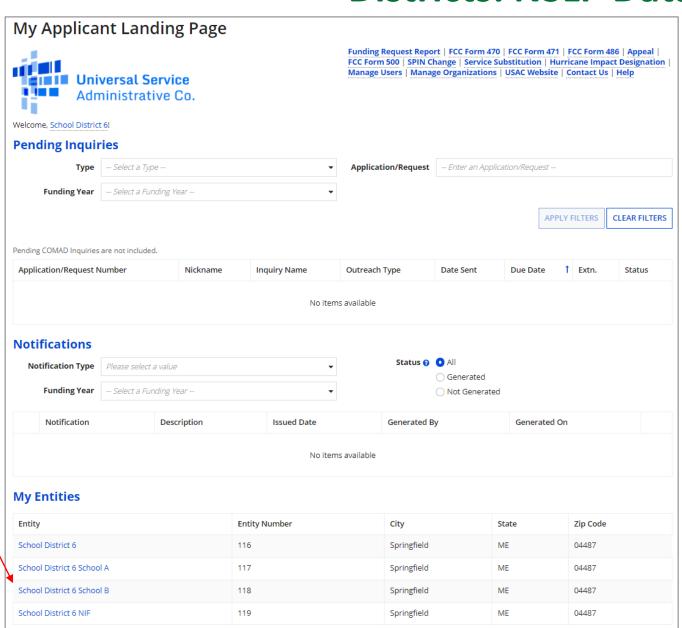












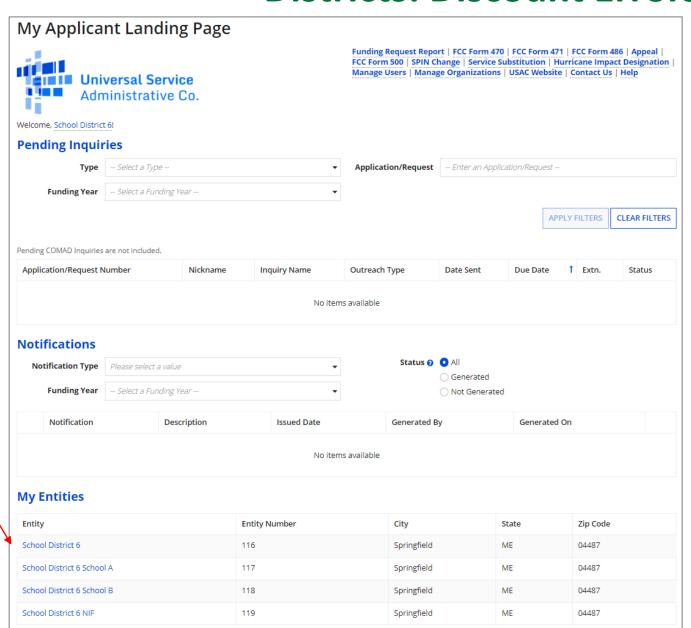
9 Repeat this process for each school in your organization

**NOTE:** NIFs do not have their own enrollment or NSLP data

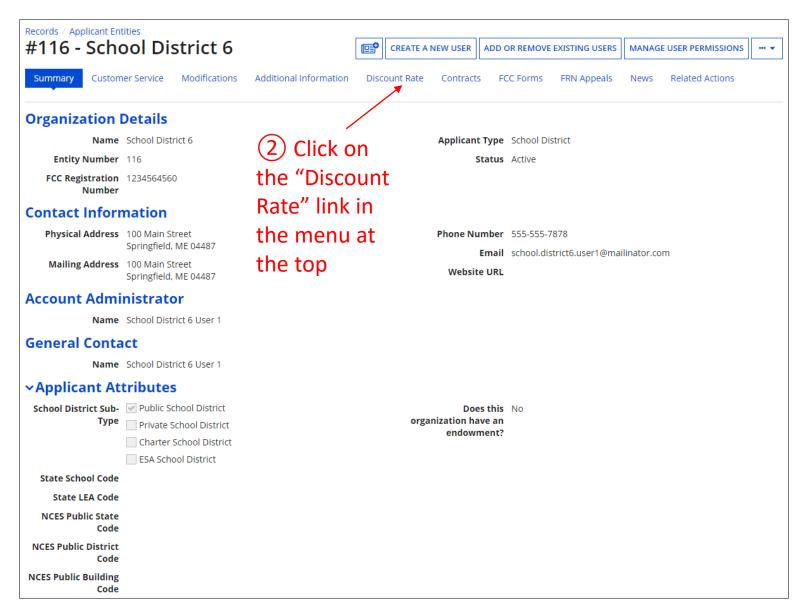


# School Districts: Checking for Discount Rate Errors





① On the Landing Page, scroll to the "My Entities" section and click on the link for your school district

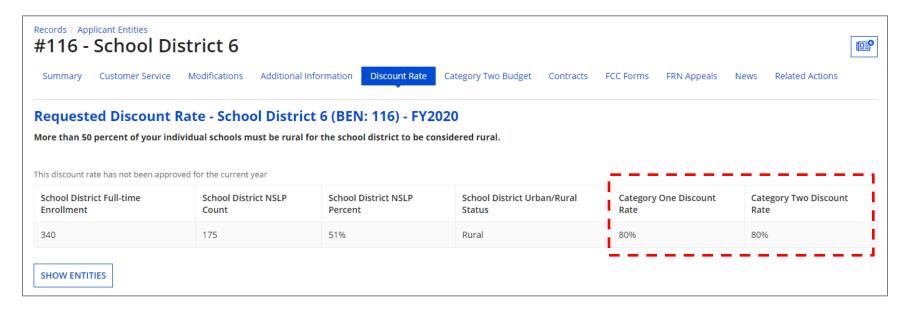




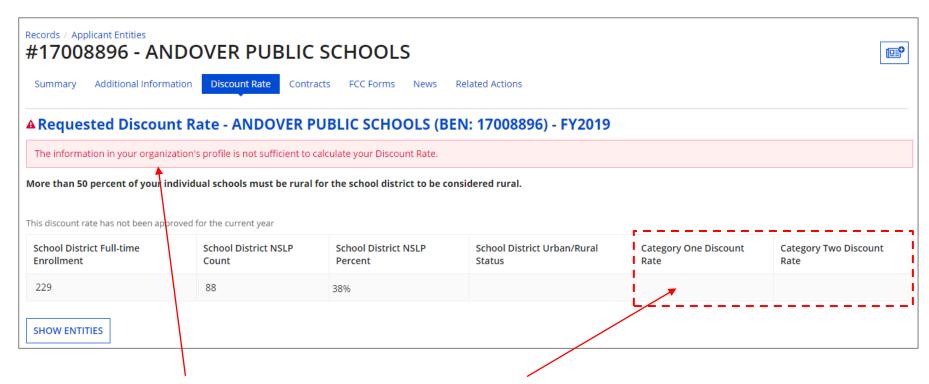
The discount rate for the school district displays

#### **NOTE:**

Category One and Category Two discounts may be different depending on which band your NSLP percentage falls in.

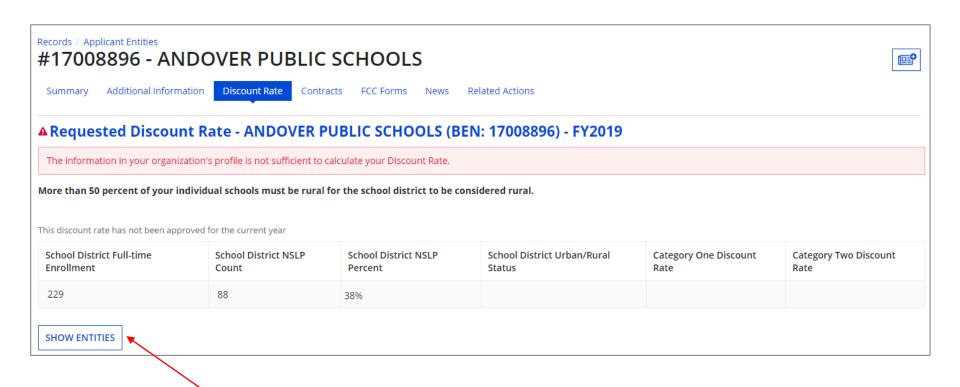






If you see an error message instead of the discount for your school district, there is an issue with one or more of the schools in your district

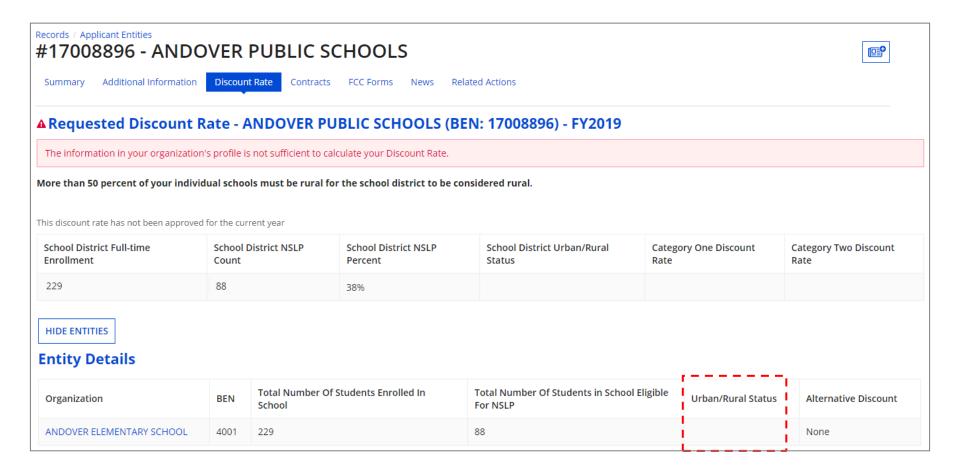




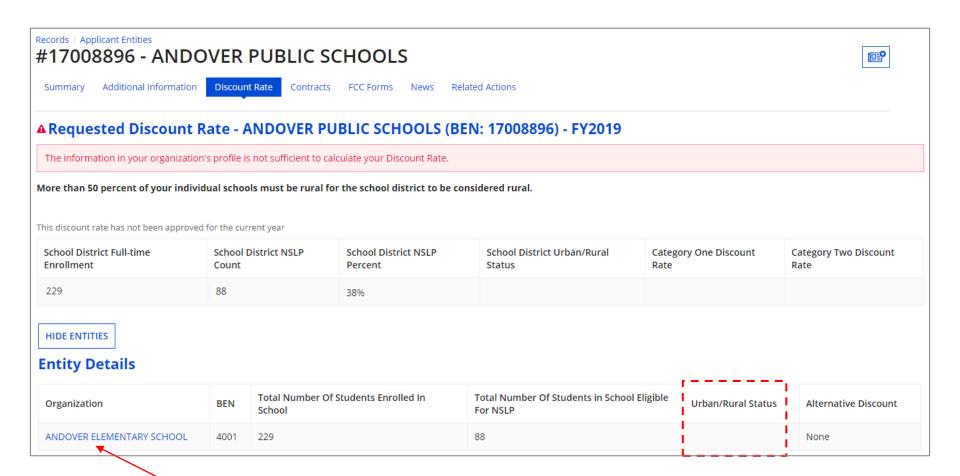
3 Click on the "SHOW ENTITIES" button to display a list of the schools in the district



One or more of your schools is likely missing information or is unable to accurately calculate a discount



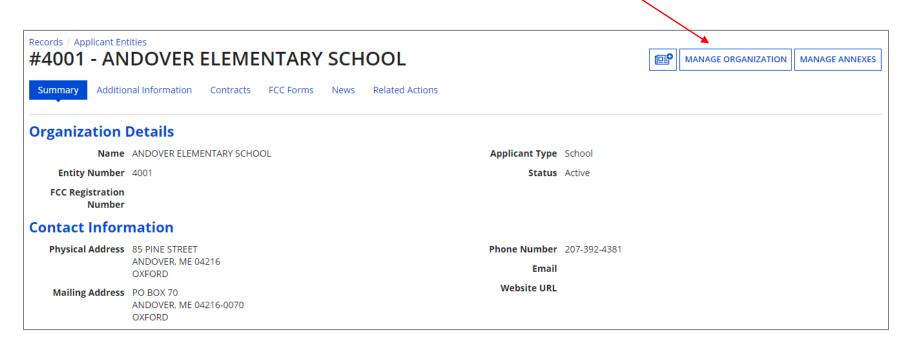




4 Click on the link for a school with an issue to go to that school's summary page

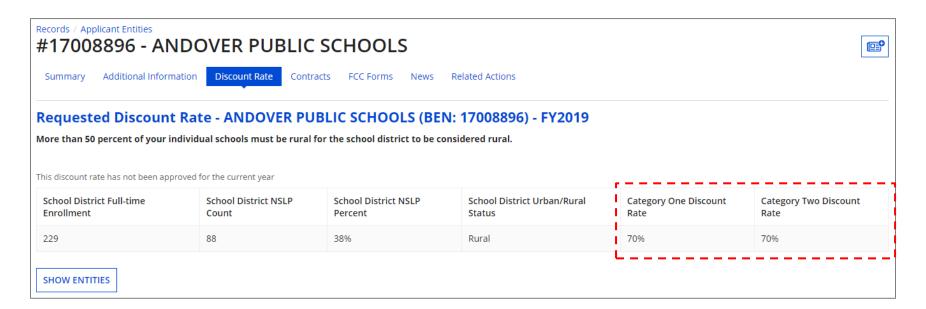


(5) Click on the school's "MANAGE ORGANIZATION" button and fix any issues that are causing the discount not to calculate





6 Return to the "Discount Rate" section for the school district and verify that the discount now displays





# School Districts: Entering Category 2 Enrollment Data in the EPC Profile By School

→ REQUIRED FIRST YEAR APPLYING FOR C2 IN THE CURRENT BUDGET CYCLE IF

OPTIONAL SUBSEQUENT YEARS IF

#### **Notes:**

For a district with 10 or fewer schools, EPC can calculate a higher C2 budget by utilizing the funding floor if any of your schools has less than 150 students. Use the "by school" method to report your student counts for each school in order to take advantage of the higher budget calculation.

If you previously entered C2 enrollment data for the FY2021 – FY2025 cycle, you are not required to update it unless you wish to in order to take advantage of increased enrollment numbers.

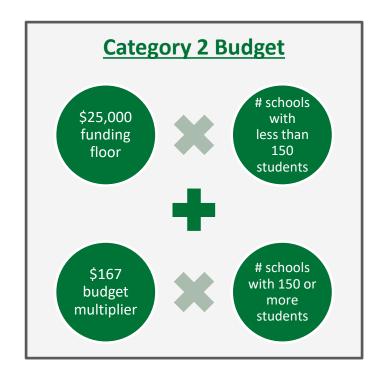


### When should I use this method?

Districts with 10 or fewer sites can calculate their C2 budgets on a **per-school basis** by entering student counts separately for each eligible site

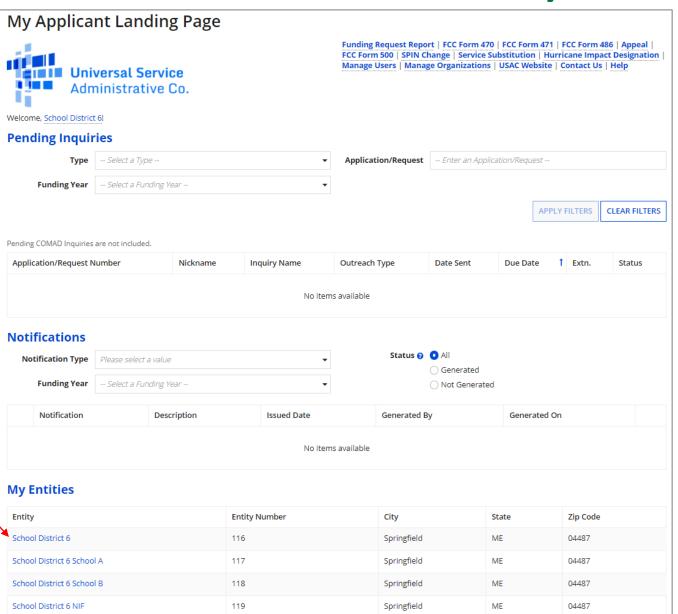
Doing so allows you to take advantage of the higher budget amount for each <u>building</u> (the funding floor VS the budget multiplier \* enrollment)

district with 10 or fewer sites >>>





#### **Districts: C2 Data By School**

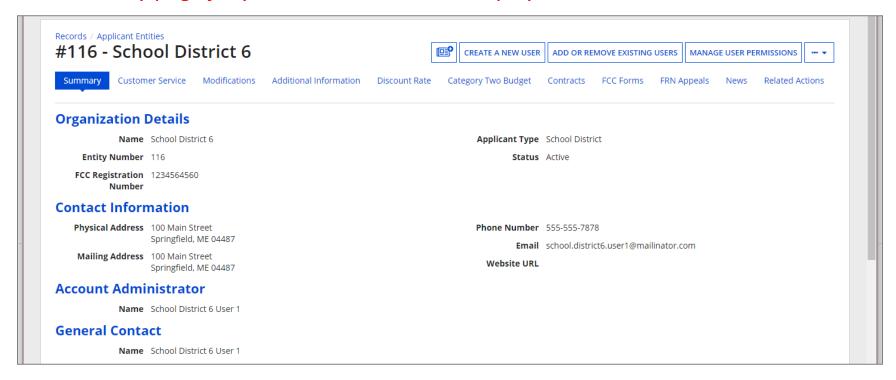


① On the Landing Page, scroll to the "My Entities" section and click on the link for your district

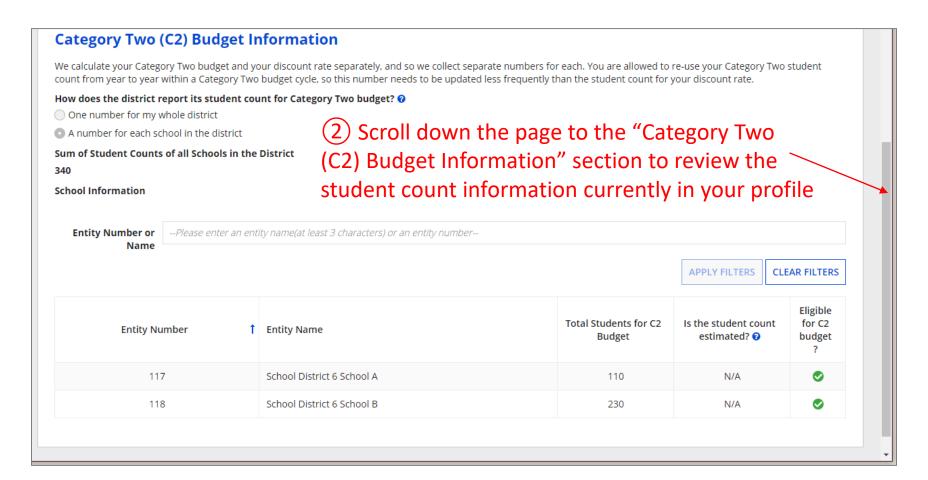


#### **Districts: C2 Data By School**

#### The summary page for your school district will display



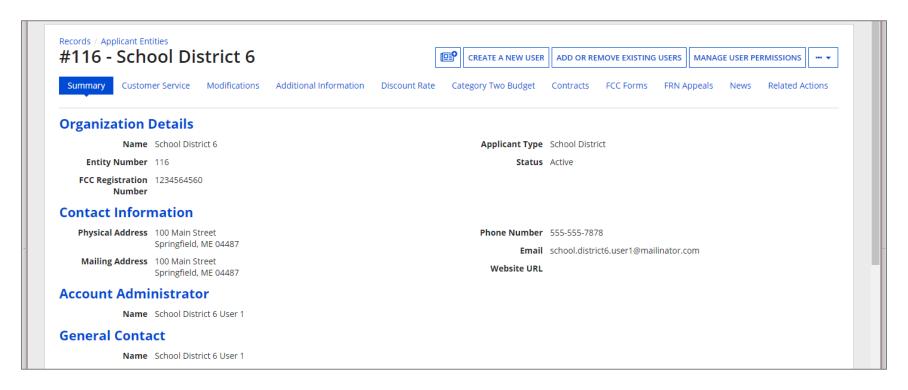




NOTE: the "Sum of Student Counts" is automatically summed from the counts of the individual schools in your district

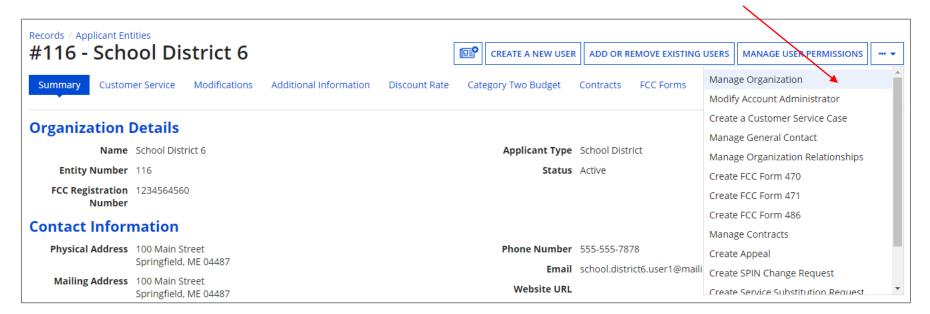


3 To make changes to the student count information, return to the top of the page



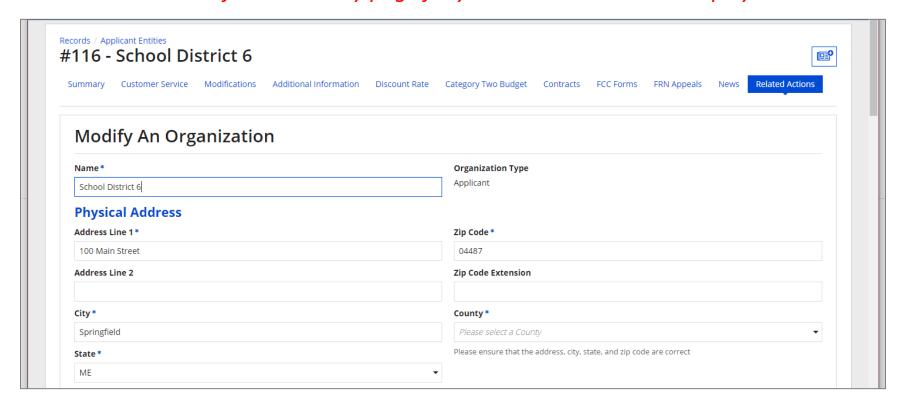


4 Click on the "..." button and choose the "Manage Organization" option from the menu

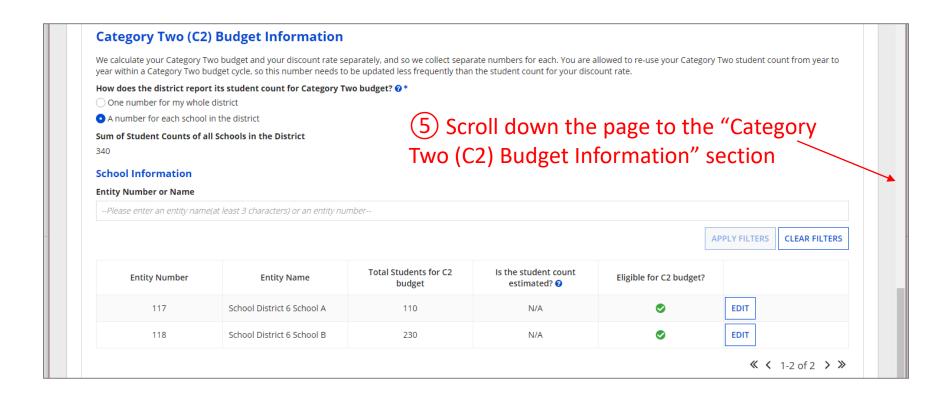




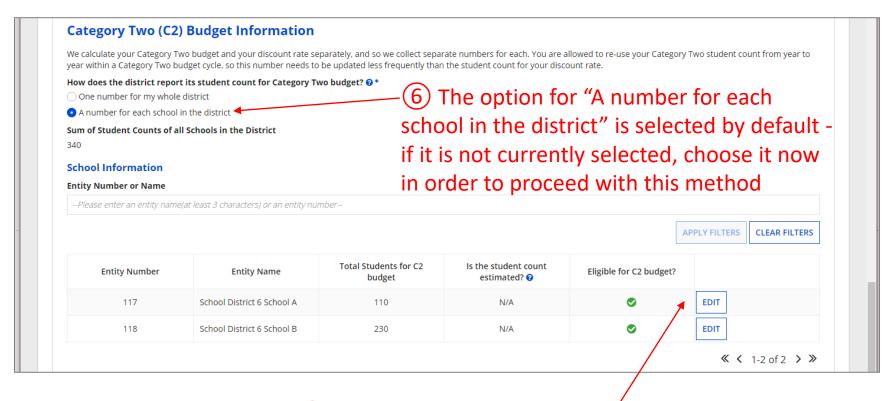
An editable version of the summary page for your school district will display





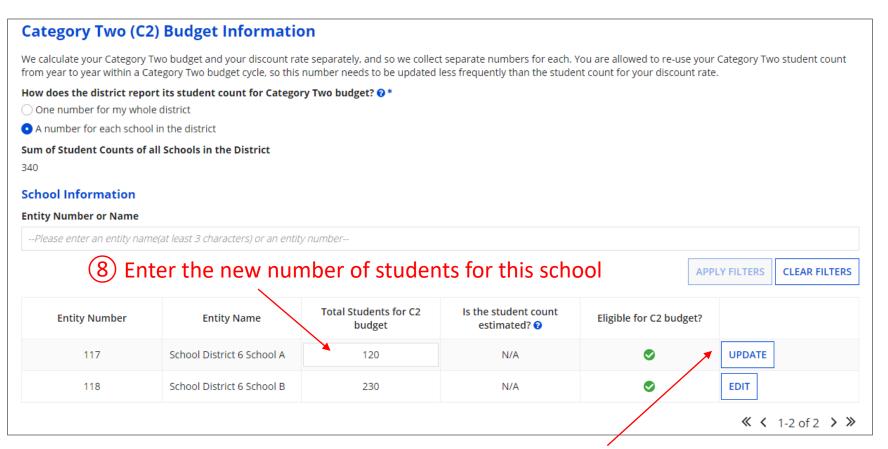






7 Click on the "EDIT" button for a school to modify that school's data for C2 budget calculations





9 Then click on the "UPDATE" button



#### **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

340

The student count is not recalculated until you submit all your updates

10 Repeat this process for each school in your organization that you need to update

#### **School Information**

**Entity Number or Name** 

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

APPLY FILTERS CLEAR FILTERS

#### Updates made to the C2 information for your schools in the table below are going to be saved once you click on the Submit button on this screen.

Entity Number	Entity Name	Total Students for C2 budget	Is the student count estimated? 🚱	Eligible for C2 budget?	
117	School District 6 School A	120	N/A	•	EDIT
118	School District 6 School B	230	N/A	•	EDIT

《 < 1-2 of 2 > 》

#### FCC Registration Number ?

1234564560

CANCEL

SUBMIT

11) Then click on the "SUBMIT" button



12) Enter a Modification Nickname to remind yourself what changes were made

Organization Modification Nickname				
All changes to your organization can be seen on the Modifications page found in the menu on your left under Modifications. Please enter a short description of the modification made in the field below.				
Modification Nickname *				
CANCEL	_			

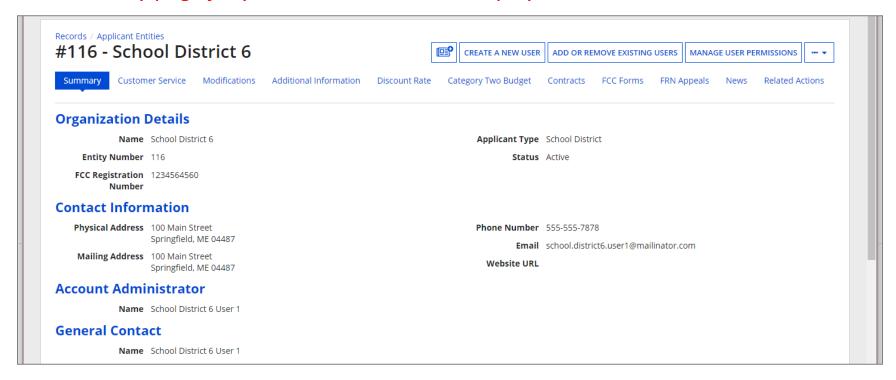




13) Then click on the "SUBMIT" button



#### The summary page for your school district will display





## School Districts:

# Entering Category 2 Enrollment Data in the EPC Profile *By Aggregate*

→ REQUIRED FIRST YEAR APPLYING FOR C2 IN THE CURRENT BUDGET CYCLE IF

OPTIONAL SUBSEQUENT YEARS IF

#### **Notes:**

For a district with 10 or fewer schools, EPC can calculate a higher C2 budget by utilizing the funding floor if any of your schools has less than 150 students. If you opt to report your student count as one district-wide aggregate number, EPC will not allow you to do this.

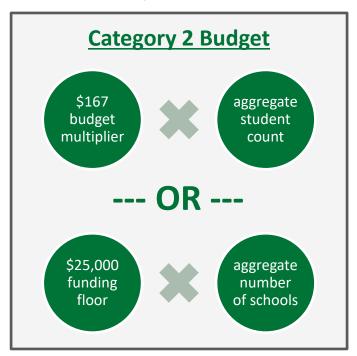
If you previously entered C2 enrollment data for the FY2021 – FY2025 cycle, you are not required to update it unless you wish to in order to take advantage of increased enrollment numbers.



## When should I use this method?

Choose this option if your district has 11 or more sites. Using this method, you only need to enter the total number of students throughout the district without detailing the precise number for the individual schools. Your C2 budget will be calculated using the district's **aggregate student count** and the aggregate funding floor (the funding floor \* the aggregate number of schools).

district with 11 or more sites >>>



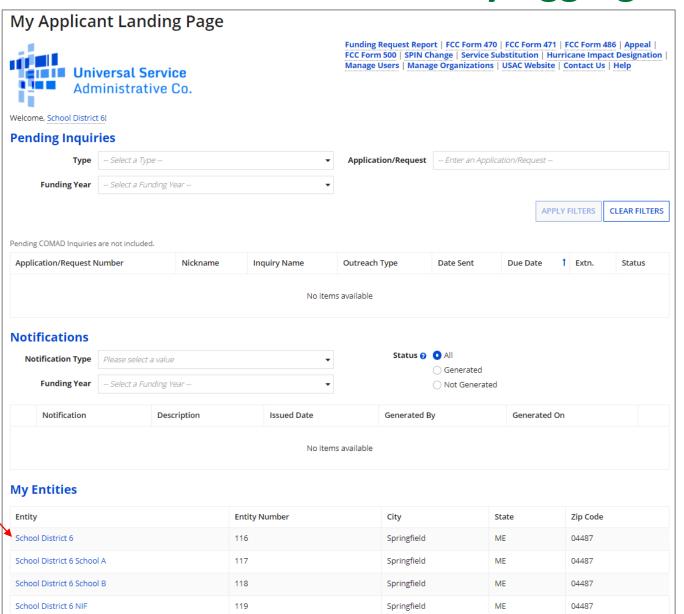
#### **Words of Caution:**

This is <u>not advisable</u> for districts with 10 or fewer schools!

If you have 10 or fewer sites, you can choose this method, however, your budget might calculate as a lower amount than what you are actually entitled to.

the district C2 budget is the greater of these two calculations

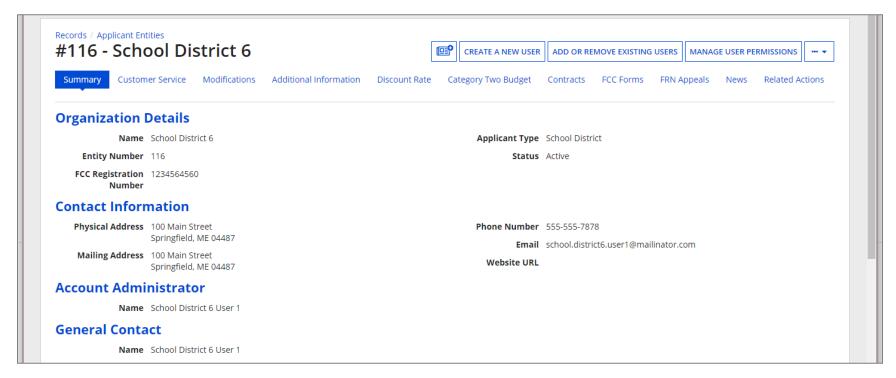




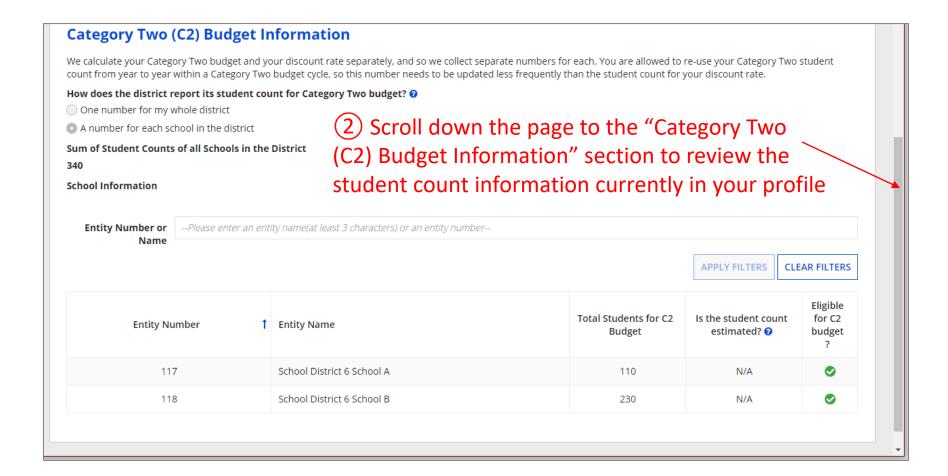
① On the Landing Page, scroll to the "My Entities" section and click on the link for your district



#### The summary page for your school district will display

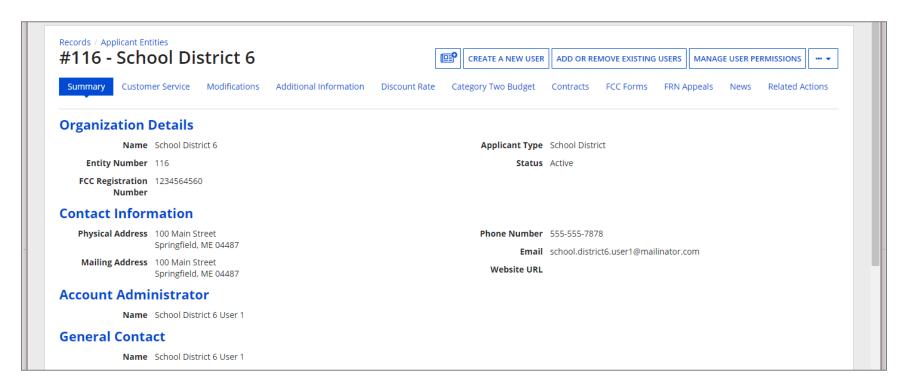






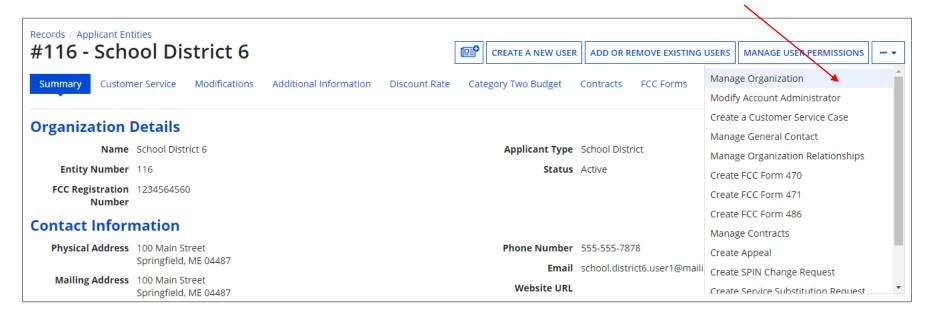


3 To make changes to the student count information, return to the top of the page



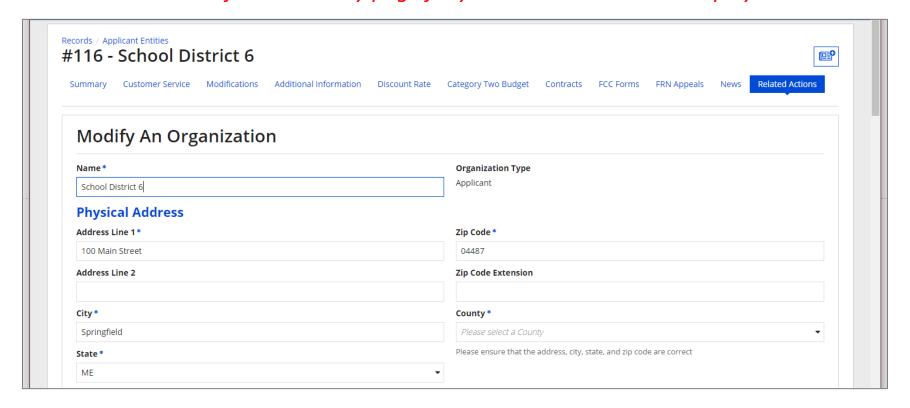


4 Click on the "..." button and choose the "Manage Organization" option from the menu

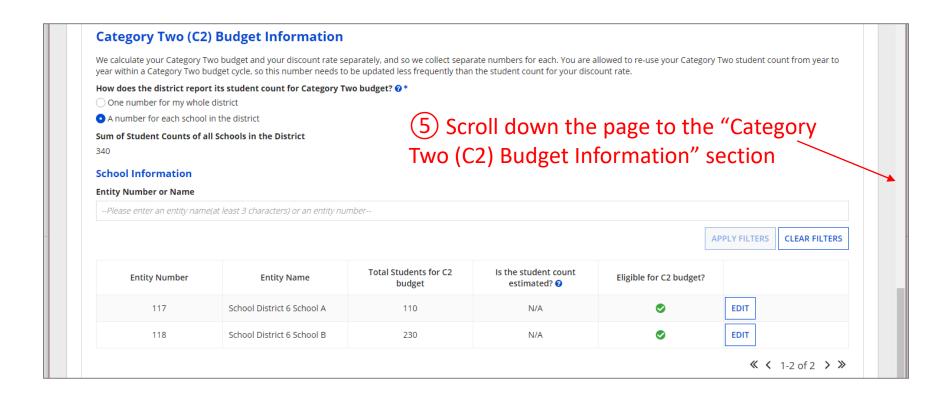




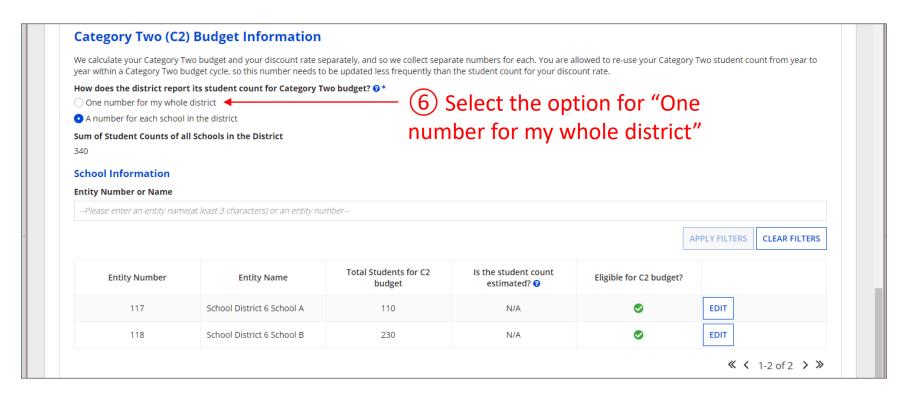
#### An editable version of the summary page for your school district will display





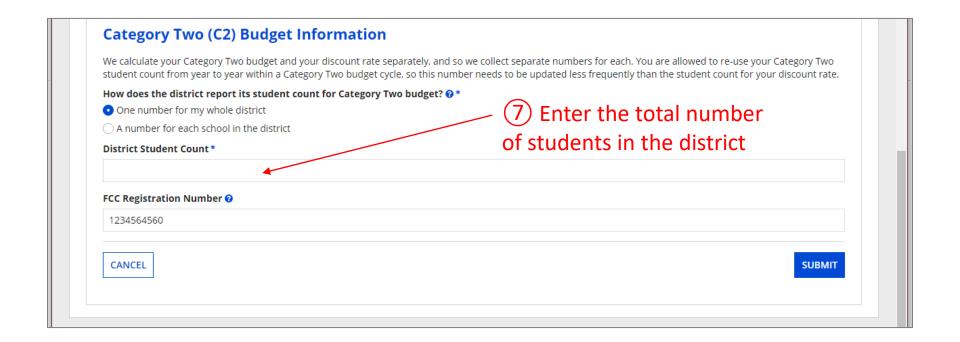




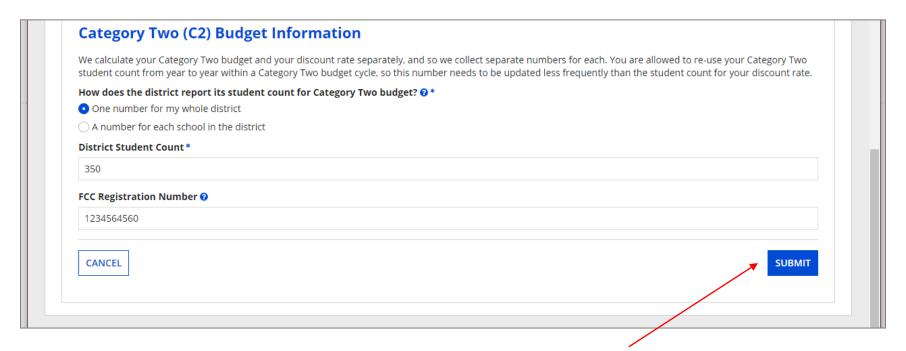


**Note:** For a district with 10 or fewer schools, EPC can calculate a higher C2 budget by utilizing the funding floor if any of your schools has 149 or fewer students. If you opt to report your student count as one district-wide aggregate number, EPC will not allow you to do this.









8 Click on the "Submit" button



9 Enter a Modification Nickname to remind yourself what changes were made

Organization Modification Nickname				
All changes to your organization can be seen on the Modifications page found in the menu on your left under Modifications. Please enter a short description of the modification made in the field below.				
Modification Nickname *				
CANCEL	SUBMIT			

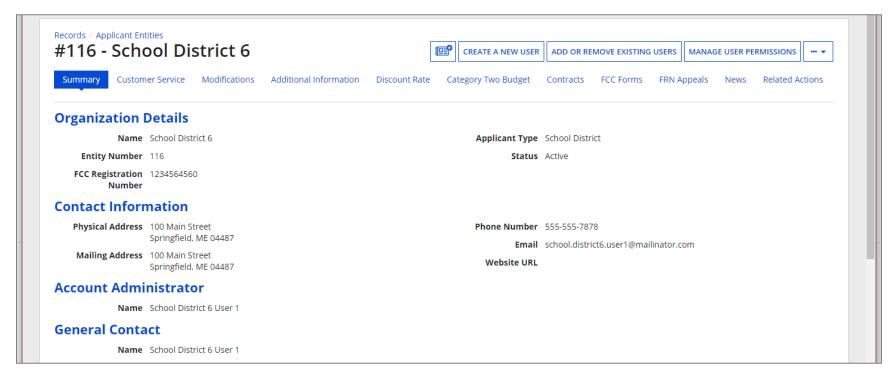




10 Then click on the "SUBMIT" button



#### The summary page for your school district will display





Once you have chosen to list C2 counts as a district aggregate, you cannot update individual school C2 counts without selecting the option for "A number for each school in the district" on the district's summary page

If the "One number for my whole district" option has been selected, the school summary pages will display the following message:

#### Category Two (C2) Budget Information

Your school district (116 - School District 6) manages the student count for its Category Two budget as one number for the district. You can manage it in the school district's entity record.

Click on the link for the school district to go to the district's summary page



# School Districts: Requesting a Replacement C2 Budget

→ OPTIONAL I←

#### Note:

If you previously entered C2 enrollment data for the FY2021 – FY2025 cycle, you are not required to update it unless you wish to in order to take advantage of increased enrollment numbers to increase your C2 budget.

You can choose to request a budget update in any or all funding years within the budget cycle.

Be aware that unless you <u>specifically request</u> a budget recalculation, the C2 budget student count for the school district will remain fixed throughout the cycle.



## Am I required to do this?

To simplify the C2 budget system, once you have validated your C2 enrollment data, your C2 budget is fixed until the end of the 5 year budget cycle (FY2021 – FY2025) unless you specifically request an updated replacement budget.

- If you have no need or desire to update your C2 budget or if this is your first year applying for C2 funding in the current budget cycle, then you do not need to do anything additional to your C2 enrollment number.
- If you want to adjust your C2 budget during the current budget cycle because student enrollment has increased or you added a child entity, you will need to complete the steps outlined in the following pages to request a recalculation of your budget.



## How do I do change my C2 budget?

#### **Step 1:** Modify your billed entity details

- Add or remove dependent school entities
- Update C2 budget student counts

**Note:** You may be able to update the C2 budget fields during the filing window, but plan on completing this step as part of the Administrative Window tasks.

#### **Step 2:** Then submit a request for a replacement budget based on that enrollment

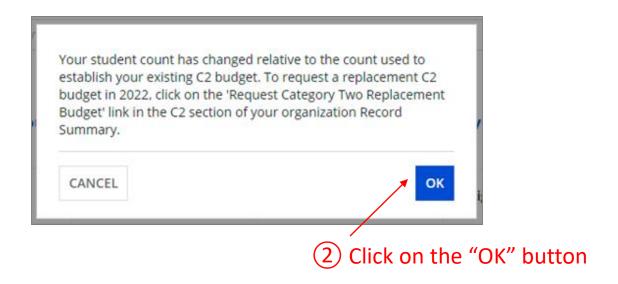
**Note:** Only full-rights users can request replacement budgets. Partial-rights users can update organization details, but only users with full rights permissions will be able to update the C2 budget.

If you fail to submit the request during the Administrative Window, you can also do it via a Receipt Acknowledgment Letter (RAL) after you certify your Form 471, but it is far better to complete this process before the Administrative Window closes.



① Complete the steps outlined in the appropriate "School Districts: Entering Category 2 Enrollment Data in the EPC Profile" section of this guide (by school or by aggregate) to modify the C2 budget enrollment numbers entered in your profile.

Once you click on the "SUBMIT" button, you will see a message describing the next step. At this point you have updated the numbers but still need to request a replacement budget based on those numbers.



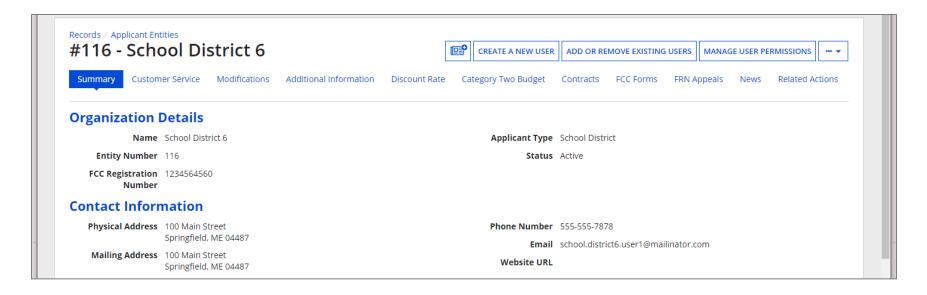


3 Go to the school district's summary page

(you may already be on this page depending on your last action)

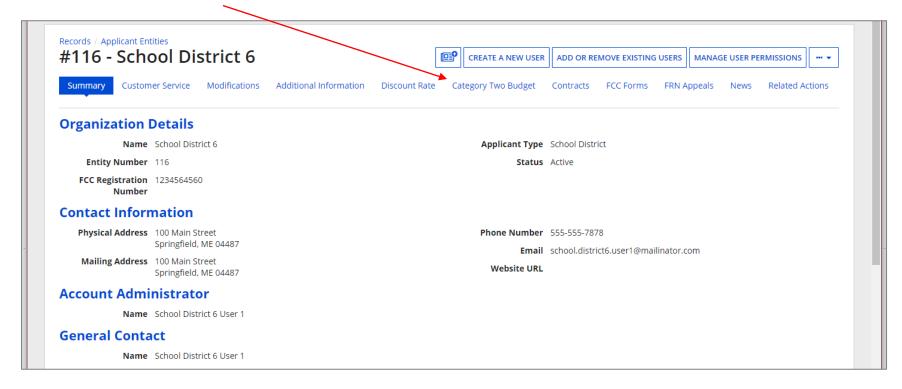
#### How to get there:

- 1) Click on the "News" link in the menu at the top of the page
- 2) Click on the USAC logo to go to your Landing Page
- 3) Click on the link for the school district's name





4 Click on the "Category Two Budget" link





#### **Category Two Budget Status**

Category Two Budget information presented below reflects data starting in FY2016.

**GET CATEGORY 2 BUDGET INFORMATION** 

(5) Click on the "GET CATEGORY 2 BUDGET INFORMATION" button

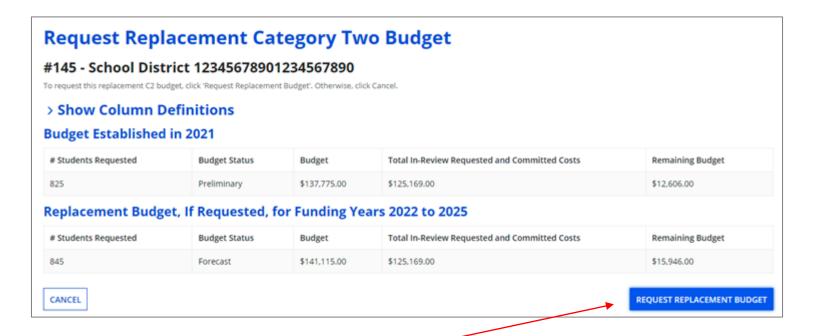




6 Note the message indicating that you have made changes to the C2 enrollment count and then click on the "Request Replacement C2 Budget" link



7 Review the potential replacement budget that is based on the updated student counts that you have entered

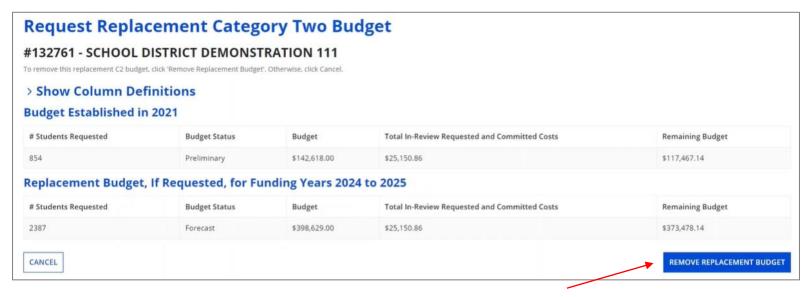


8 If you wish to update your budget as projected, click on the "REQUEST REPLACEMENT BUDGET" button



## **Districts: Replacement C2 Budget**

If you wish to remove the request for a replacement budget, you can return to the "Request Replacement Category Two Budget" screen through the following path: School Summary Page >>> "Related Actions" link >>> "Request Replacement Category Two Budget" link



Click on the "REMOVE REPLACEMENT BUDGET" button to remove the previous replacement budget request

Note that this button will no longer be available after you certify your first C2 application for this funding year. Reach out to your PIA reviewer if you wish to remove the replacement budget you have requested.

## Independent Schools



## What data should schools update?

Independent schools report student counts for two purposes:

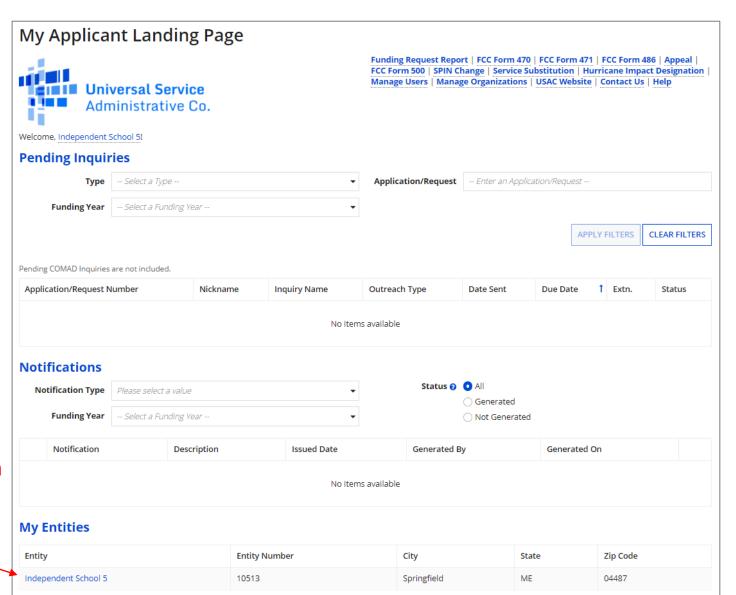
- 1. To calculate your school's E-Rate discount percentage → REQUIRED ANNUALLY ←
- 2. To update data for your school's Category 2 Budget
  - → REQUIRED FIRST YEAR APPLYING FOR C2 1←
  - → OPTIONAL SUBSEQUENT YEARS 1←
    - you only need to update these student counts once for your 5 Year C2 Budget
      - If you previously entered budget data for the FY2021 FY2025 cycle, you
        are not required to update it
      - If you wish to if your student data has fluctuated to your benefit, such as an increased student enrollment – you may request to update your school C2 budget data



# Independent Schools: Updating NSLP Data in the EPC Profile

→ REQUIRED ANNUALLY +

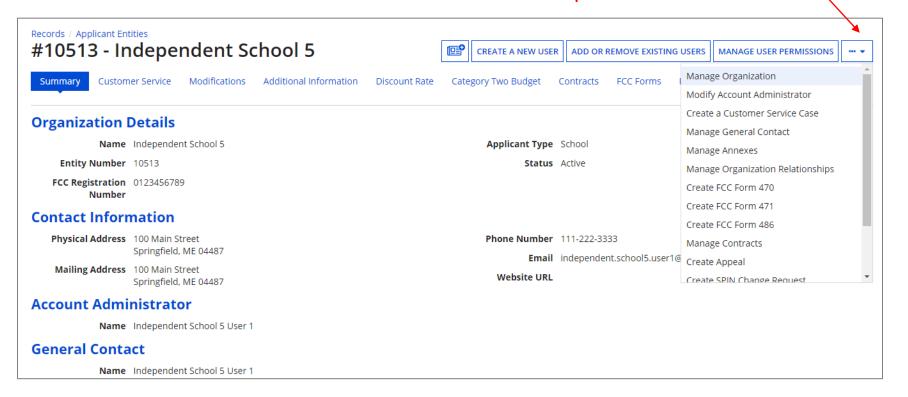




1 On the Landing Page, scroll to the "My Entities" section and click on the link for your school

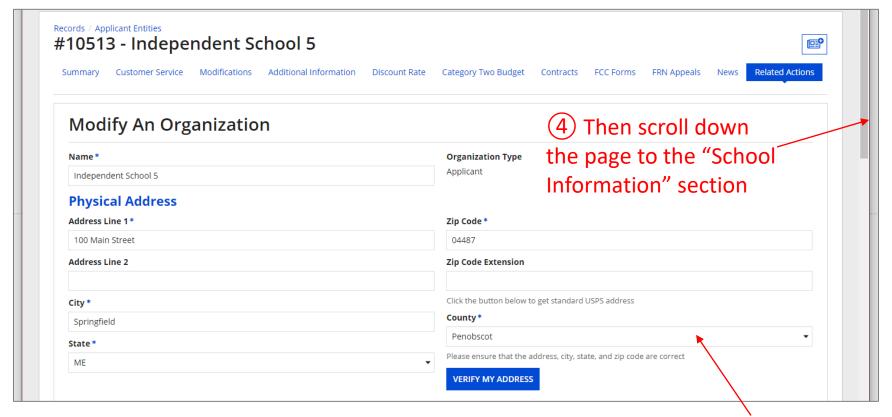
The summary page for your school will display

2 Click on the "..." button and choose the "Manage Organization" option from the menu



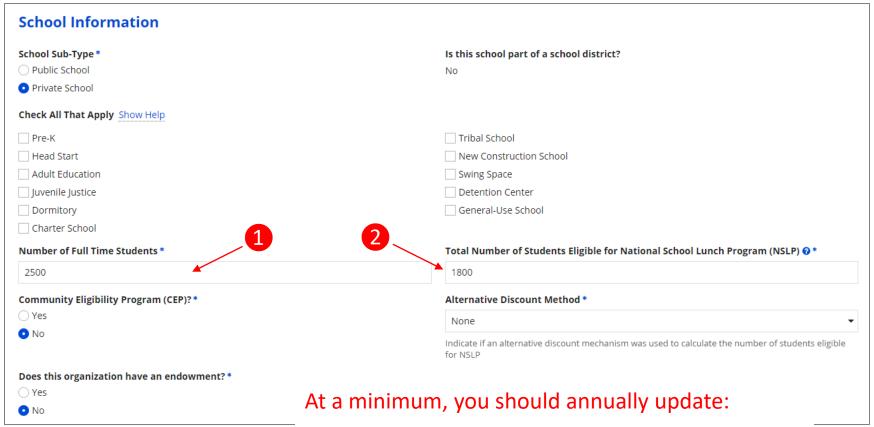


#### An editable version of the summary page will display



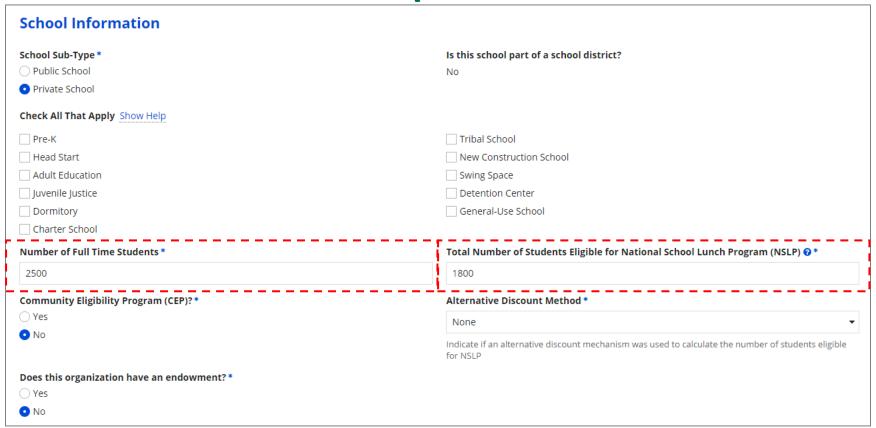
3 Select a county if one is not already listed here





- 1 the number of full time students
- 2 the total number of students eligible for NSLP

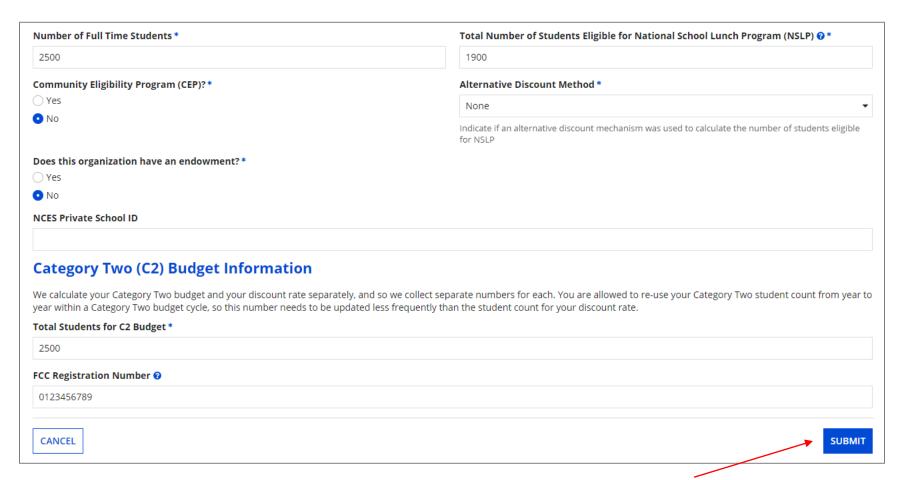




(5) Edit the fields for the "Number of Full Time Students" and the "Total Number of Students Eligible for National School Lunch Program (NSLP)"

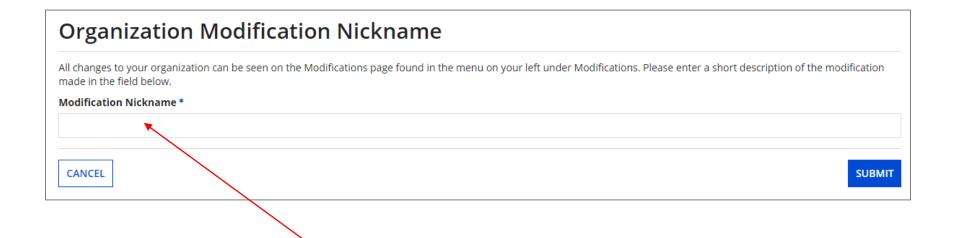
For best results, use the numbers reported to the Maine State Department of Education for the current academic year. During PIA review, USAC will validate your discount by comparing your profile data to DoE data.





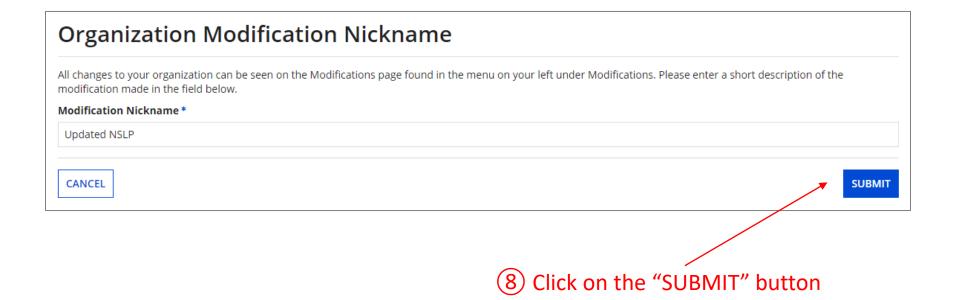
6 Click on the "SUBMIT" button to save the changes



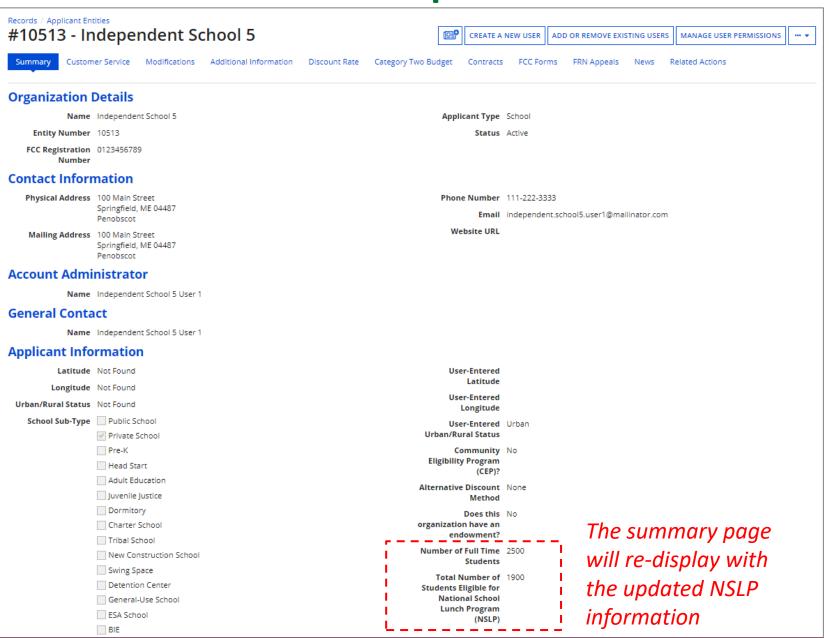


(7) Enter a Modification Nickname to remind yourself what changes were made



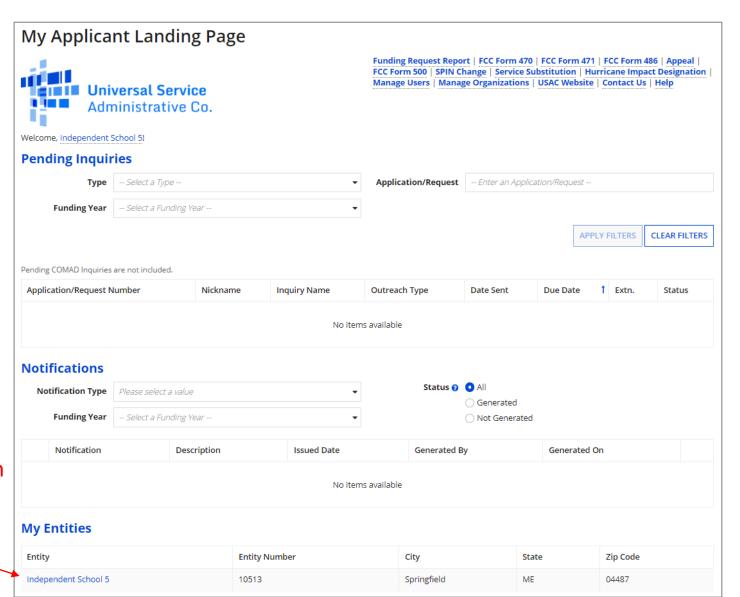




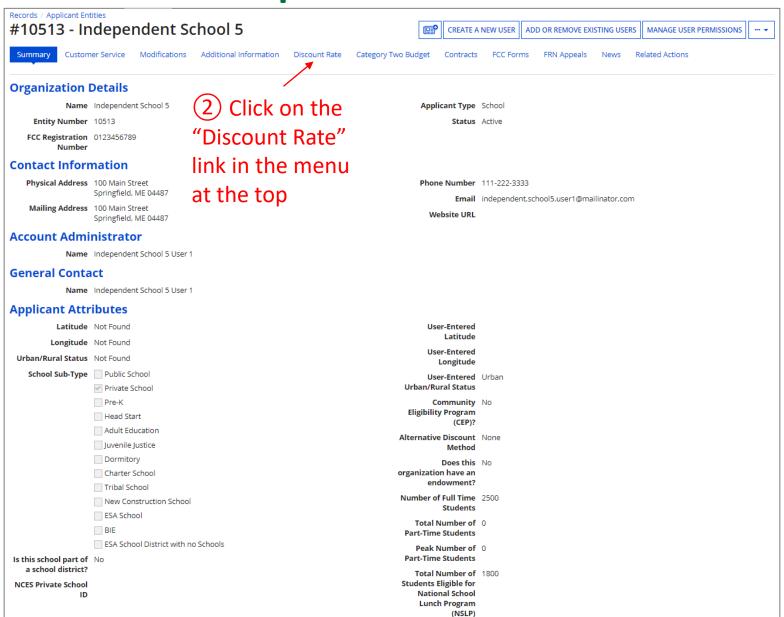


## Independent Schools: Checking for Discount Rate Errors





1 On the Landing Page, scroll to the "My Entities" section and click on the link for your school

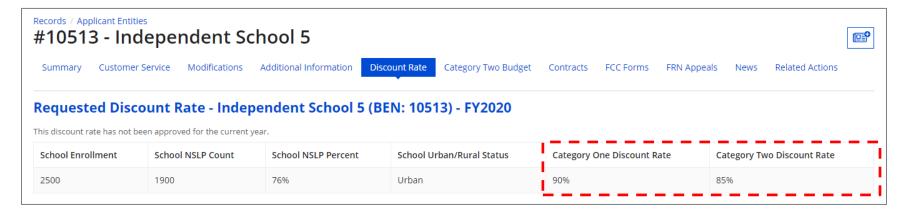




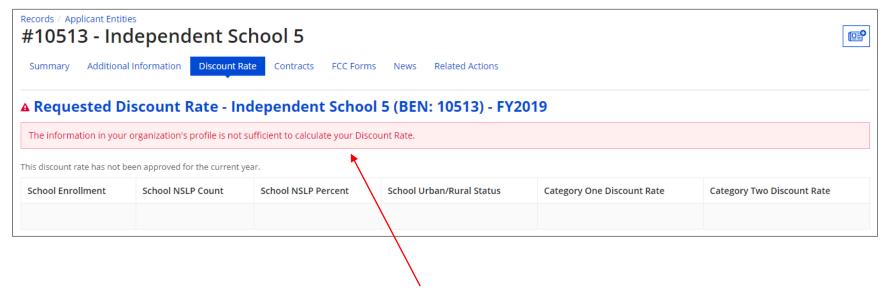
The discount rate for the independent school displays

#### **NOTE:**

Category One and Category Two discounts may be different depending on which band your NSLP percentage falls in.



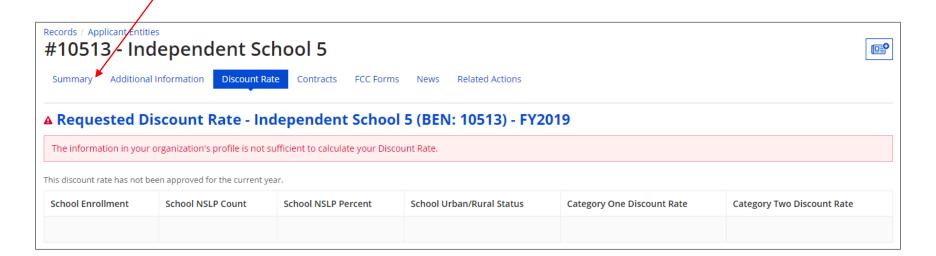




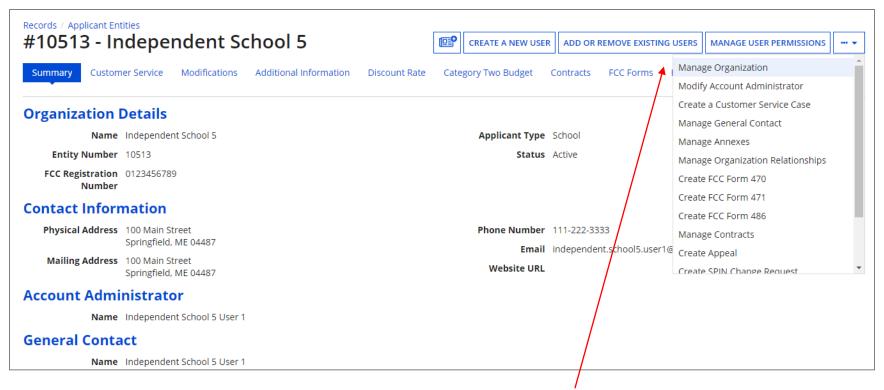
If you see an error message instead of the discount, there is an issue with the profile information for your school



3 Click on the "Summary" link

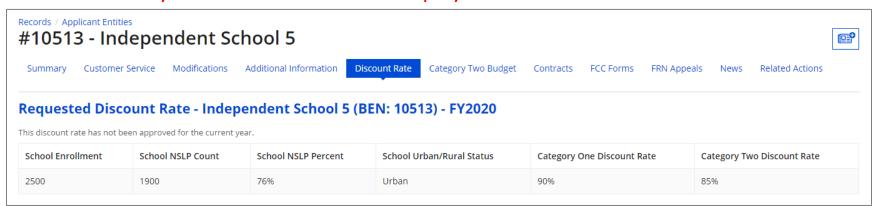






- 4 Click on the "..." button and choose the "MANAGE ORGANIZATION" option
- 5 Fix any issues causing the discount not to calculate

6 Return to the "Discount Rate" section for the school and verify that the discount now displays





# Independent Schools: Entering Category 2 Enrollment Data in the EPC Profile

→ REQUIRED FIRST YEAR APPLYING FOR C2 IN THE CURRENT BUDGET CYCLE '← OPTIONAL SUBSEQUENT YEARS '←

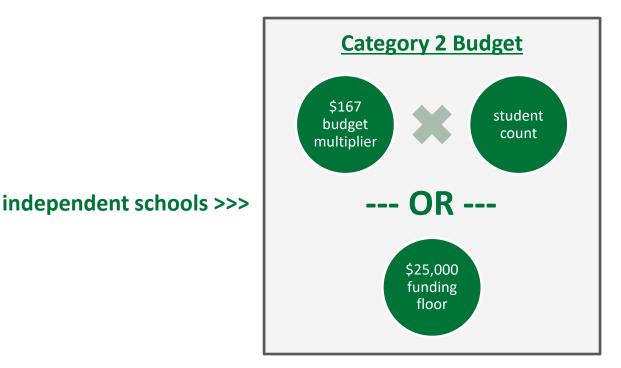
#### Note:

If you previously entered C2 enrollment data for the FY2021 – FY2025 cycle, you are not required to update it unless you wish to in order to take advantage of increased enrollment numbers.



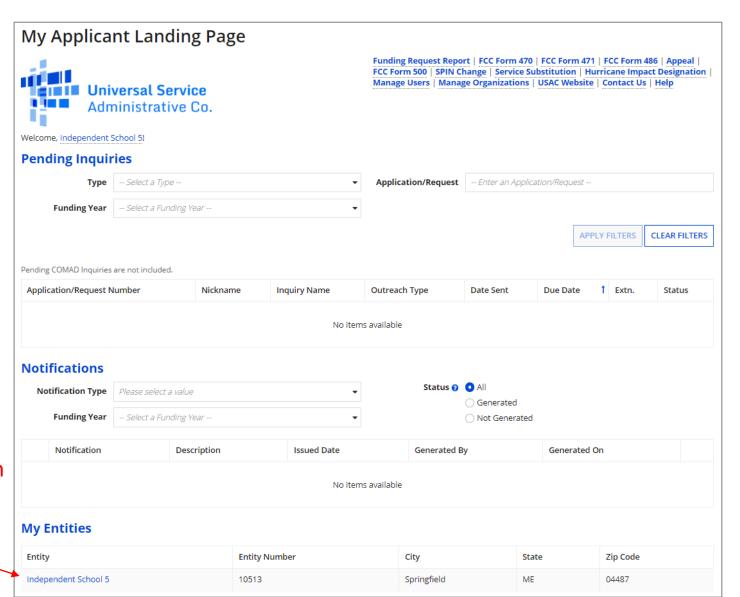
## What is my C2 Budget?

The C2 budget for independent schools is based on the total number of students



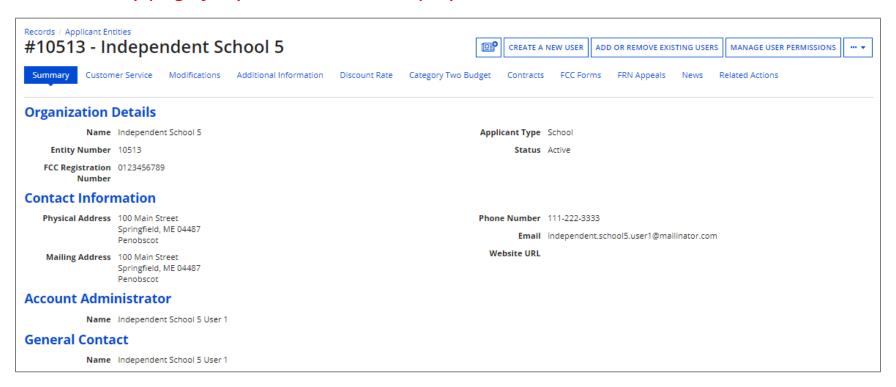
the C2 budget is the greater of these two calculations





1 On the Landing Page, scroll to the "My Entities" section and click on the link for your school

#### The summary page for your school will display





② Scroll down the page to the "Category Two (C2) Budget Information" section to review the student count information currently in your profile

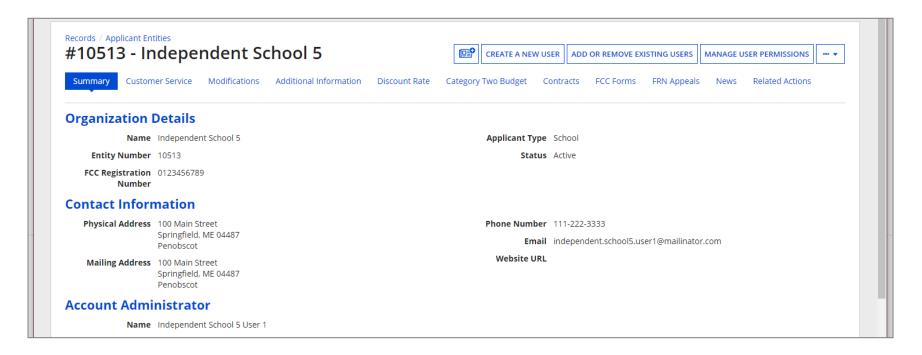
#### **Category Two (C2) Budget Information**

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 2500 Budget

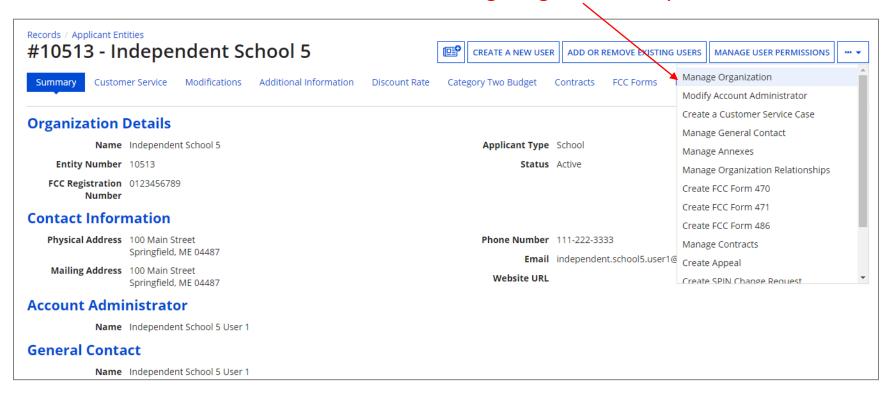


3 To make changes to the student count information, return to the top of the page



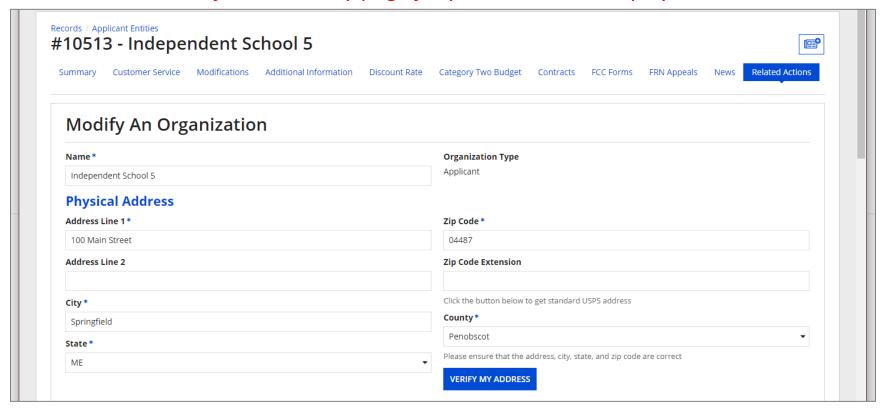


4 Click on the "..." button and choose the "Manage Organization" option from the menu



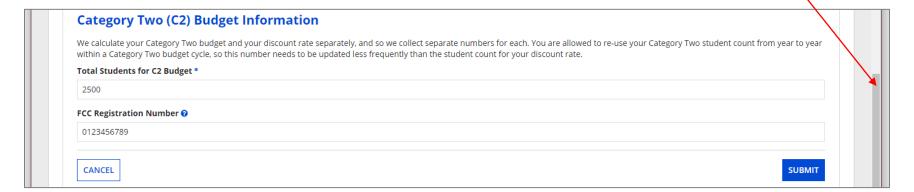


An editable version of the summary page for your school will display



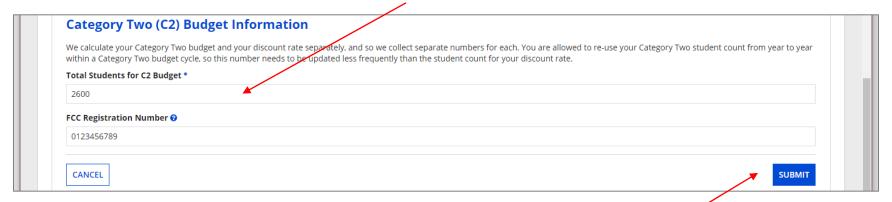


⑤ Scroll down the page to the "Category Two (C2) Budget Information" section \





6 Enter the new number of students



7 Then click on the "SUBMIT" button



8 Enter a Modification Nickname to remind yourself what changes were made

Organization Modification Nickname	
All changes to your organization can be seen on the Modifications page found in the menu on your left under Modifications. Please enter a short descriptio modification made in the field below.	n of the
Modification Nickname *	
CANCEL	SUBMIT



Organization Modification Nickname
All changes to your organization can be seen on the Modifications page found in the menu on your left under Modifications. Please enter a short description of the modification made in the field below.  Modification Nickname *
C2 Budget Count Updates
CANCEL

9 Then click on the "SUBMIT" button



## Independent Schools: Requesting a Replacement C2 Budget

→ OPTIONAL I←

#### Note:

If you previously entered C2 enrollment data for the FY2021 – FY2025 cycle, you are not required to update it unless you wish to in order to take advantage of increased enrollment numbers to increase your C2 budget.

You can choose to request a budget update in any or all funding years within the budget cycle.

Be aware that unless you <u>specifically request</u> a budget recalculation, the C2 budget student count for the school will remain fixed throughout the cycle.



## Am I required to do this?

To simplify the C2 budget system, once you have validated your C2 enrollment data, your C2 budget is fixed until the end of the 5 year budget cycle (FY2021 – FY2025) unless you specifically request an updated replacement budget.

- If you have no need or desire to update your C2 budget or if this is your first year applying for C2 funding in the current budget cycle, then you do not need to do anything additional to your C2 enrollment number.
- If you want to adjust your C2 budget during the current budget cycle because student enrollment has increased, you will need to complete the steps outlined in the following pages to request a recalculation of your budget.



## How do I do change my C2 budget?

#### **Step 1:** Update your C2 budget student enrollment

#### Note:

You may be able to update the C2 budget fields during the filing window, but plan on completing this step as part of the Administrative Window tasks.

#### **Step 2:** Then submit a request for a replacement budget based on that enrollment

#### Note:

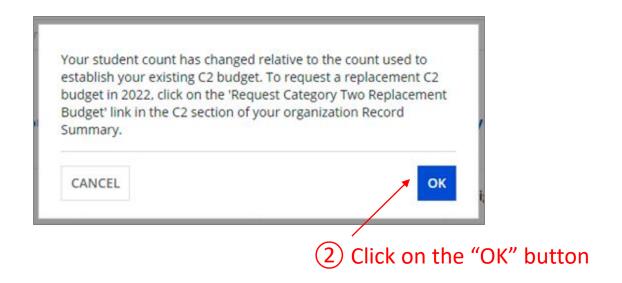
Only full-rights users can request replacement budgets. Partial-rights users can update organization details, but only users with full rights permissions will be able to update the C2 budget.

If you fail to submit the request during the Administrative Window, you can also do it via a Receipt Acknowledgment Letter (RAL) after you certify your Form 471, but it is far better to complete this process before the Administrative Window closes.



① Complete the steps outlined in the "Independent Schools: Entering Category 2 Enrollment Data in the EPC Profile" section of this guide to modify the C2 budget enrollment number entered in your profile.

Once you click on the "SUBMIT" button, you will see a message describing the next step. At this point you have updated the enrollment number but still need to request a replacement budget based on those numbers.



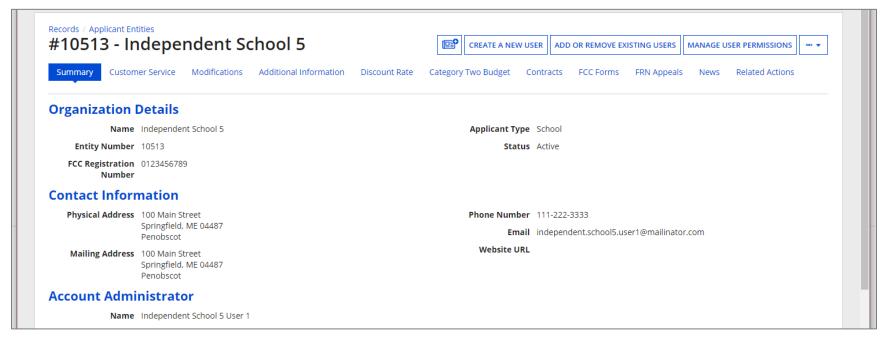


3 Go to the school's summary page

(you may already be on this page depending on your last action)

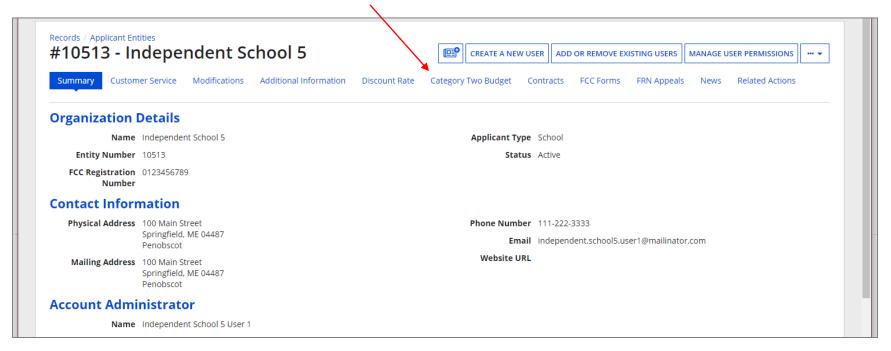
#### How to get there:

- 1) Click on the "News" link in the menu at the top of the page
- 2) Click on the USAC logo to go to your Landing Page
- 3) Click on the link for the independent school's name





4 Click on the "Category Two Budget" link





#### **Category Two Budget Status**

Category Two Budget information presented below reflects data starting in FY2016.

**GET CATEGORY 2 BUDGET INFORMATION** 

(5) Click on the "GET CATEGORY 2 BUDGET INFORMATION" button

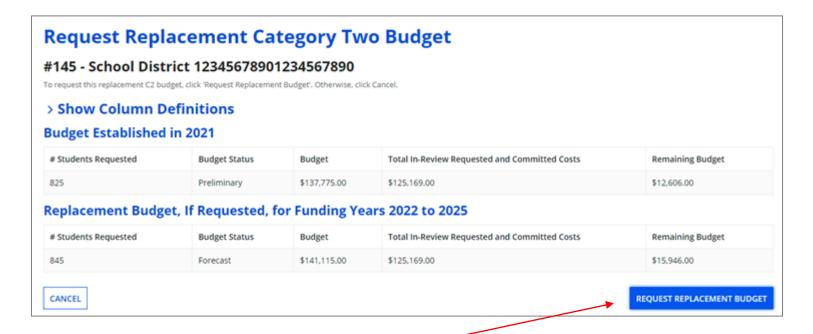




6 Note the message indicating that you have made changes to the C2 enrollment count and then click on the "Request Replacement C2 Budget" link



7 Review the potential replacement budget that is based on the updated student counts that you have entered



8 If you wish to update your budget as projected, click on the "REQUEST REPLACEMENT BUDGET" button



If you wish to remove the request for a replacement budget, you can return to the "Request Replacement Category Two Budget" screen through the following path:

BEN Summary Page >>> "Related Actions" link >>> "Request Replacement Category
Two Budget" link



Click on the "REMOVE REPLACEMENT BUDGET" button to remove the previous replacement budget request

Note that this button will no longer be available after you certify your first C2 application for this funding year. Reach out to your PIA reviewer if you wish to remove the replacement budget you requested.