Updating Your EPC Profile for FY2023 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.

FY2023 Administrative Window:
October 25, 2022 – TBD (just before the FY2023 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

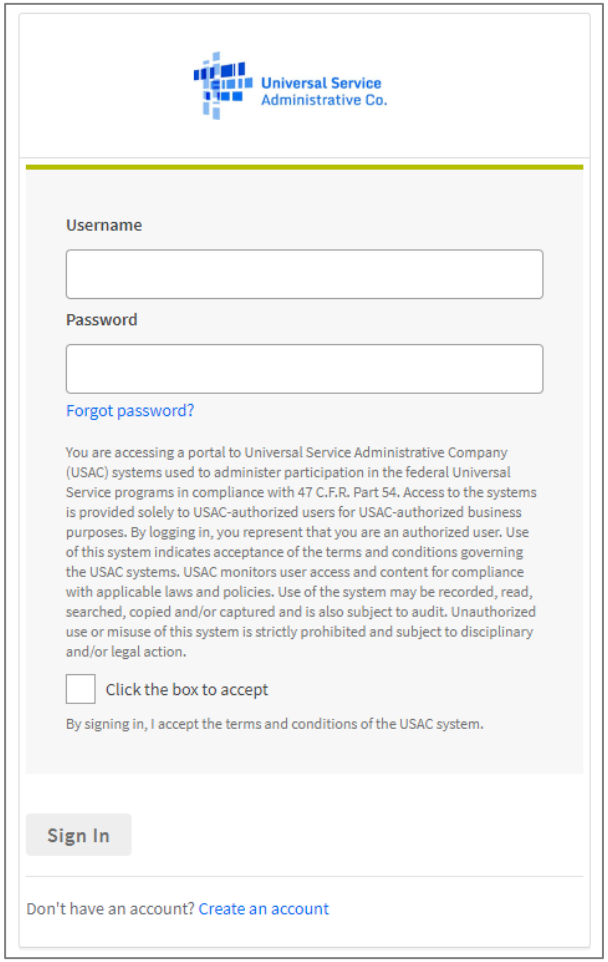
Maine State E-Rate Coordinator for Schools:
Anne Perloff
(207) 581-3584
anne.perloff@maine.edu

Logging Into EPC

Logging Into EPC

① Navigate to https://forms.universalservice.org/portal

② Log into One Portal with your username (your full email address) and One Portal password



Logging Into EPC

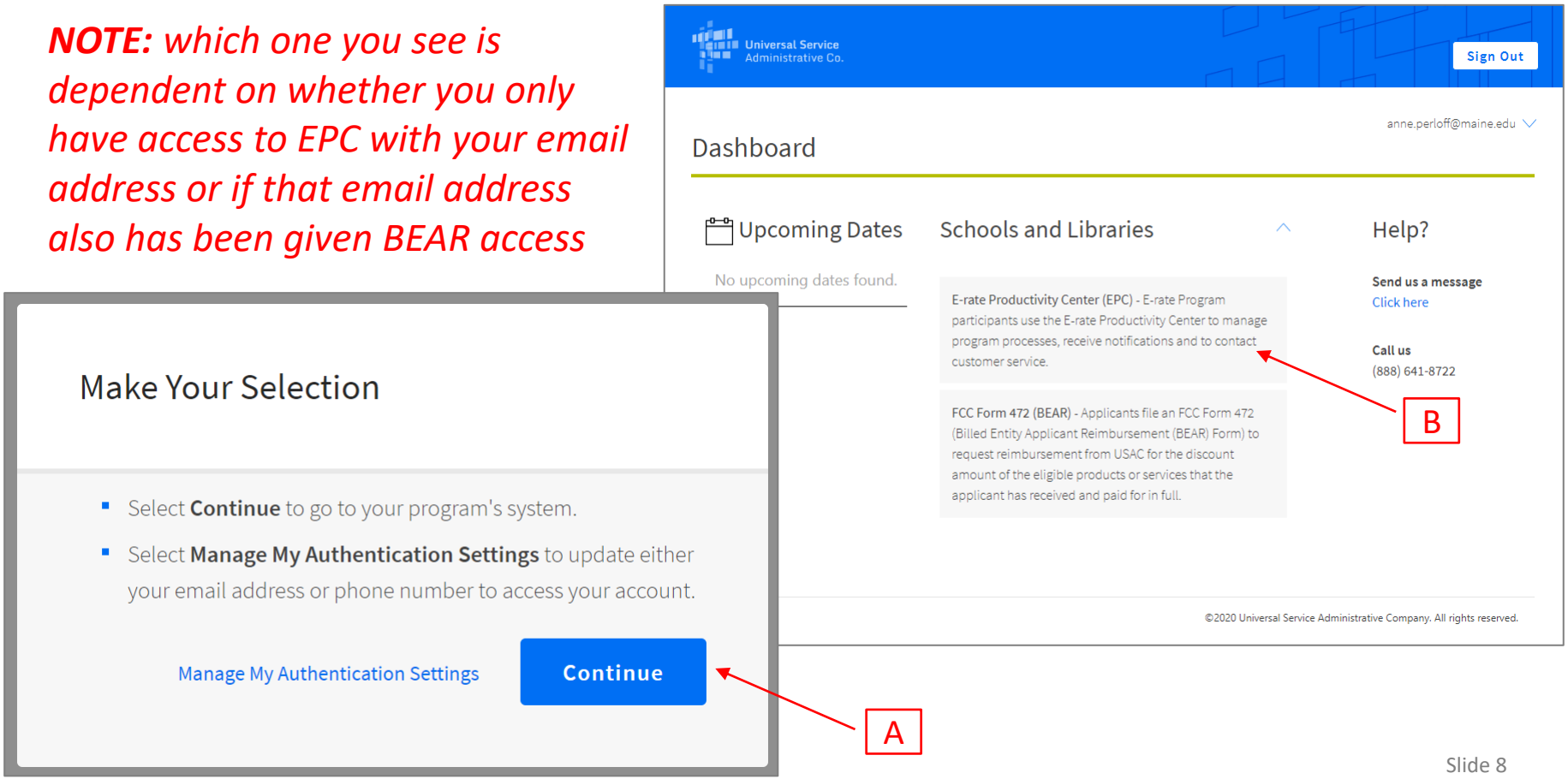
③ Complete the steps as prompted to obtain and enter a one-time verification code

④ Once you have successfully logged into One Portal, access EPC either through the

A pop-up (click on the "Continue" button) or

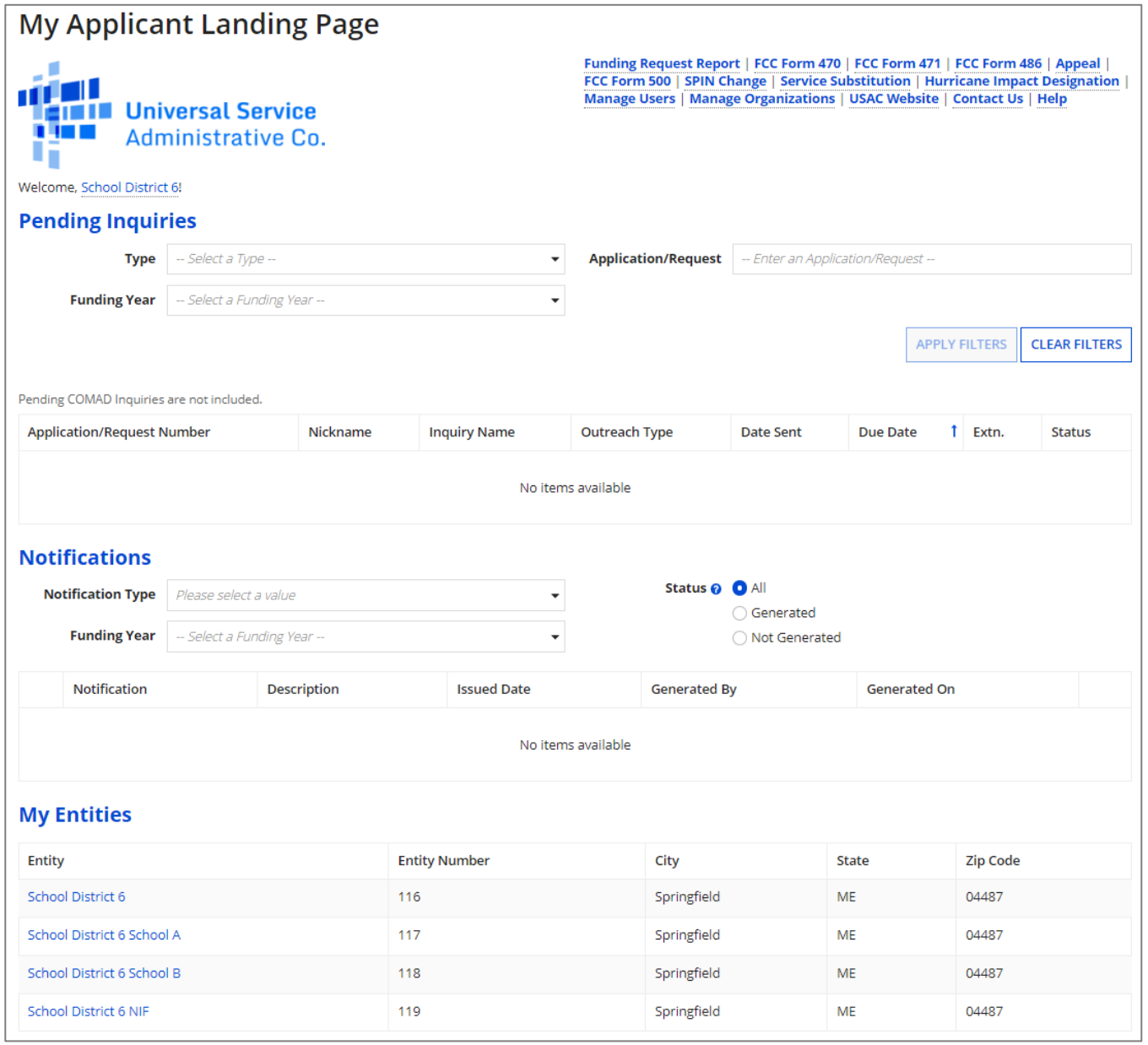
B the dashboard (click on the block for EPC)

NOTE: *which one you see is dependent on whether you only have access to EPC with your email address or if that email address also has been given BEAR access*



Logging Into EPC

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

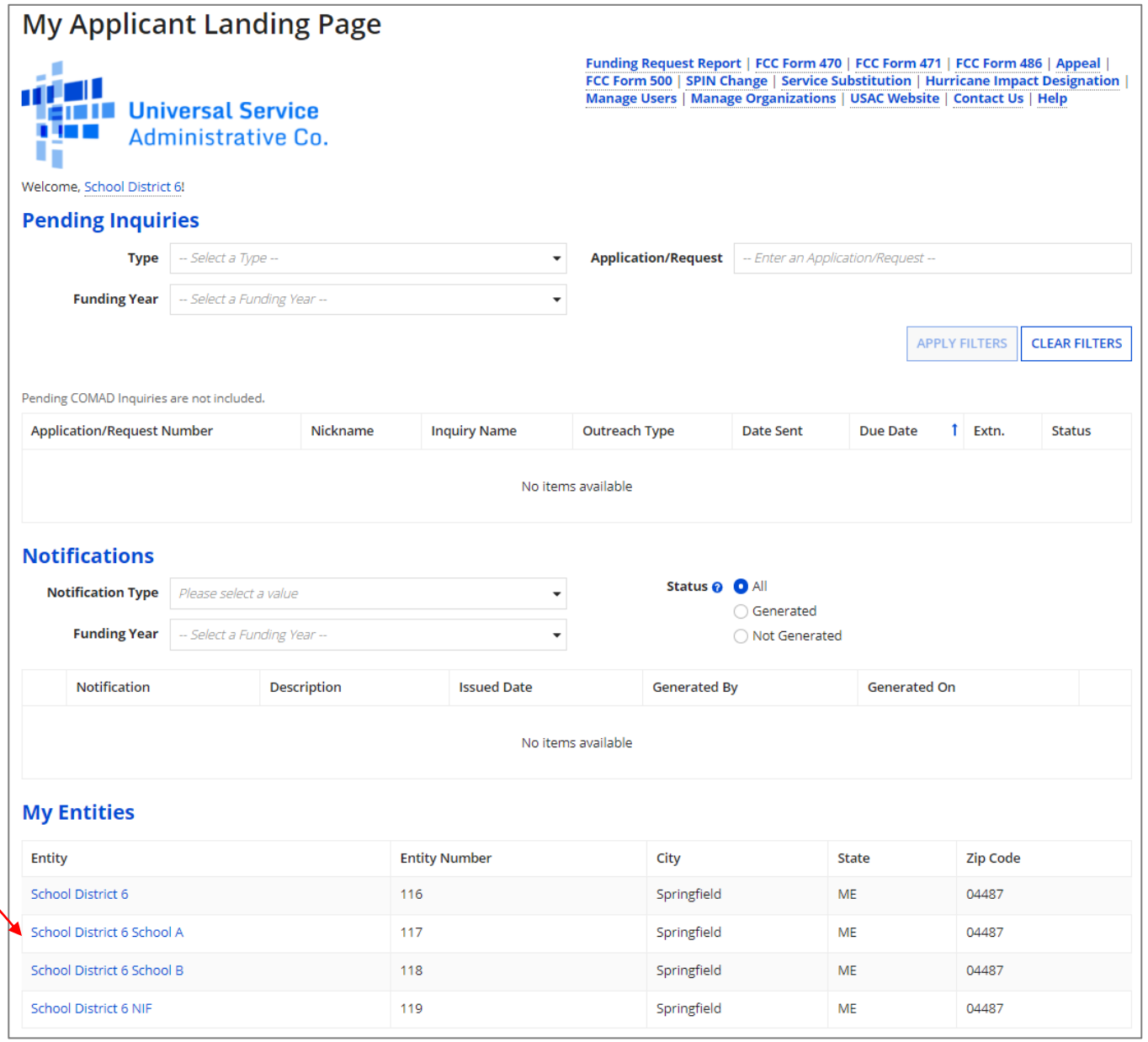
   →| REQUIRED FIRST YEAR APPLYING FOR C2 |←

   →| OPTIONAL SUBSEQUENT YEARS |←
   - 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

⇥I REQUIRED ANNUALLY I⇤

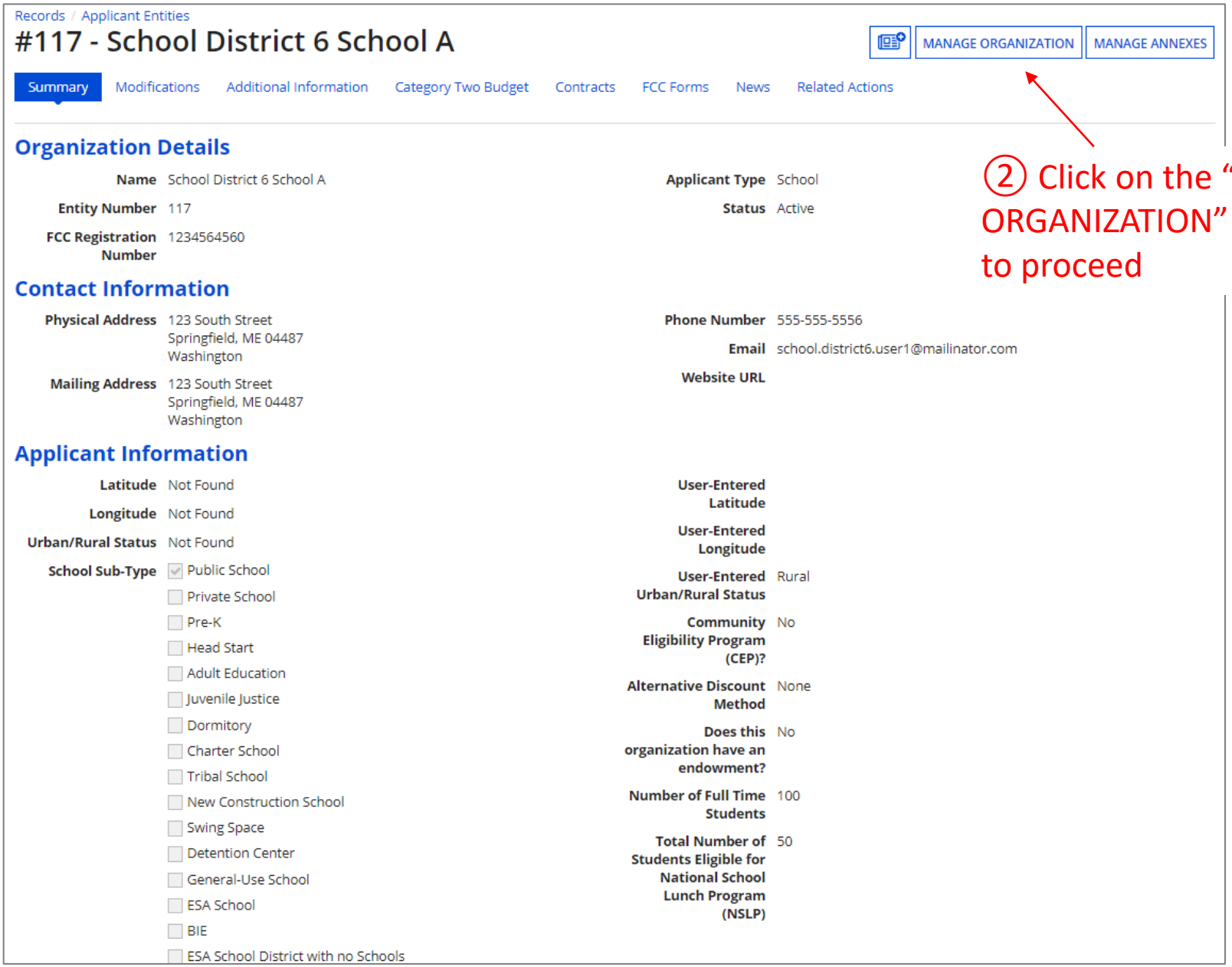
Districts: NSLP Data



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

Districts: NSLP Data

The summary page for that school will display



Records / Applicant Entities

#117 - School District 6 School A

MANAGE ORGANIZATION | MANAGE ANNEXES

Summary | Modifications | Additional Information | Category Two Budget | Contracts | FCC Forms | News | Related Actions

Organization Details

Name School District 6 School A
Entity Number 117
FCC Registration Number 1234564560
Applicant Type School
Status Active

Contact Information

Physical Address 123 South Street
Springfield, ME 04487
Washington

Mailing Address 123 South Street
Springfield, ME 04487
Washington

Phone Number 555-555-5556
Email school.district6.user1@mailinator.com
Website URL

Applicant Information

Latitude Not Found
Longitude Not Found
Urban/Rural Status Not Found

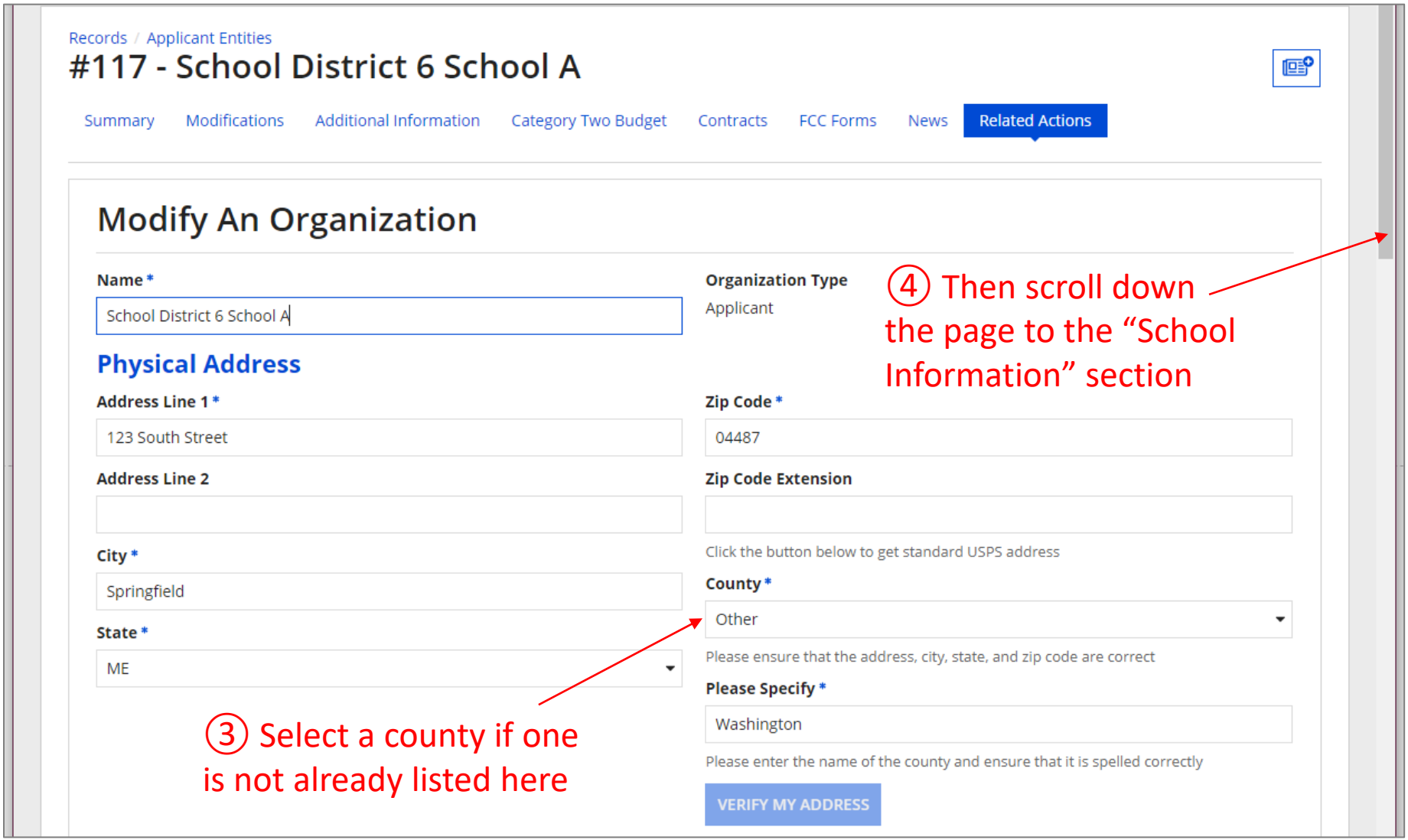
School Sub-Type
- [x] Public School
- [ ] Private School
- [ ] Pre-K
- [ ] Head Start
- [ ] Adult Education
- [ ] Juvenile Justice
- [ ] Dormitory
- [ ] Charter School
- [ ] Tribal School
- [ ] New Construction School
- [ ] Swing Space
- [ ] Detention Center
- [ ] General-Use School
- [ ] ESA School
- [ ] BIE
- [ ] ESA School District with no Schools

User-Entered Latitude
User-Entered Longitude
User-Entered Urban/Rural Status Rural
Community Eligibility Program (CEP)? No
Alternative Discount Method None
Does this organization have an endowment? No
Number of Full Time Students 100
Total Number of Students Eligible for National School Lunch Program (NSLP) 50

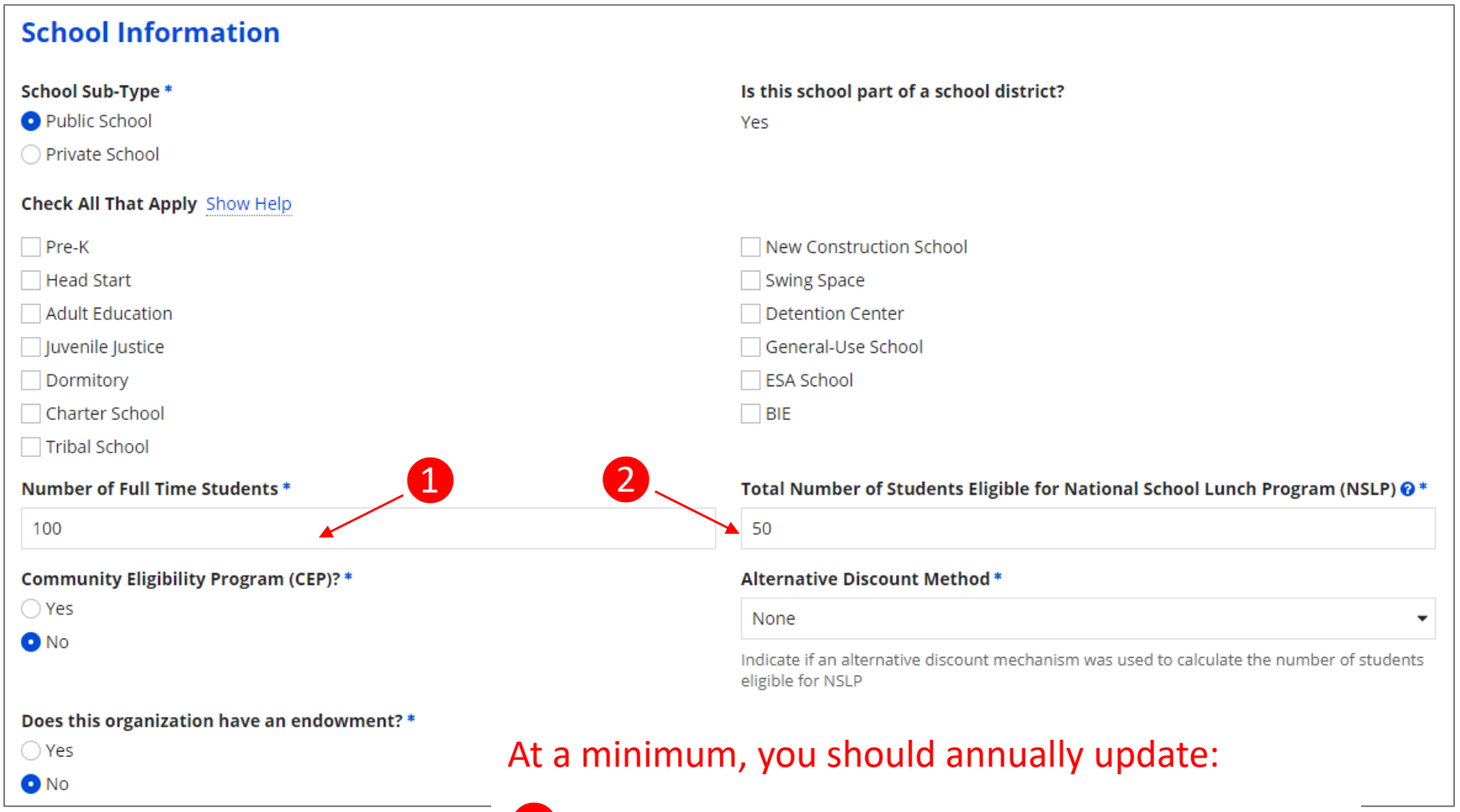
② Click on the "MANAGE ORGANIZATION" button to proceed

Districts: NSLP Data

An editable version of the summary page will display



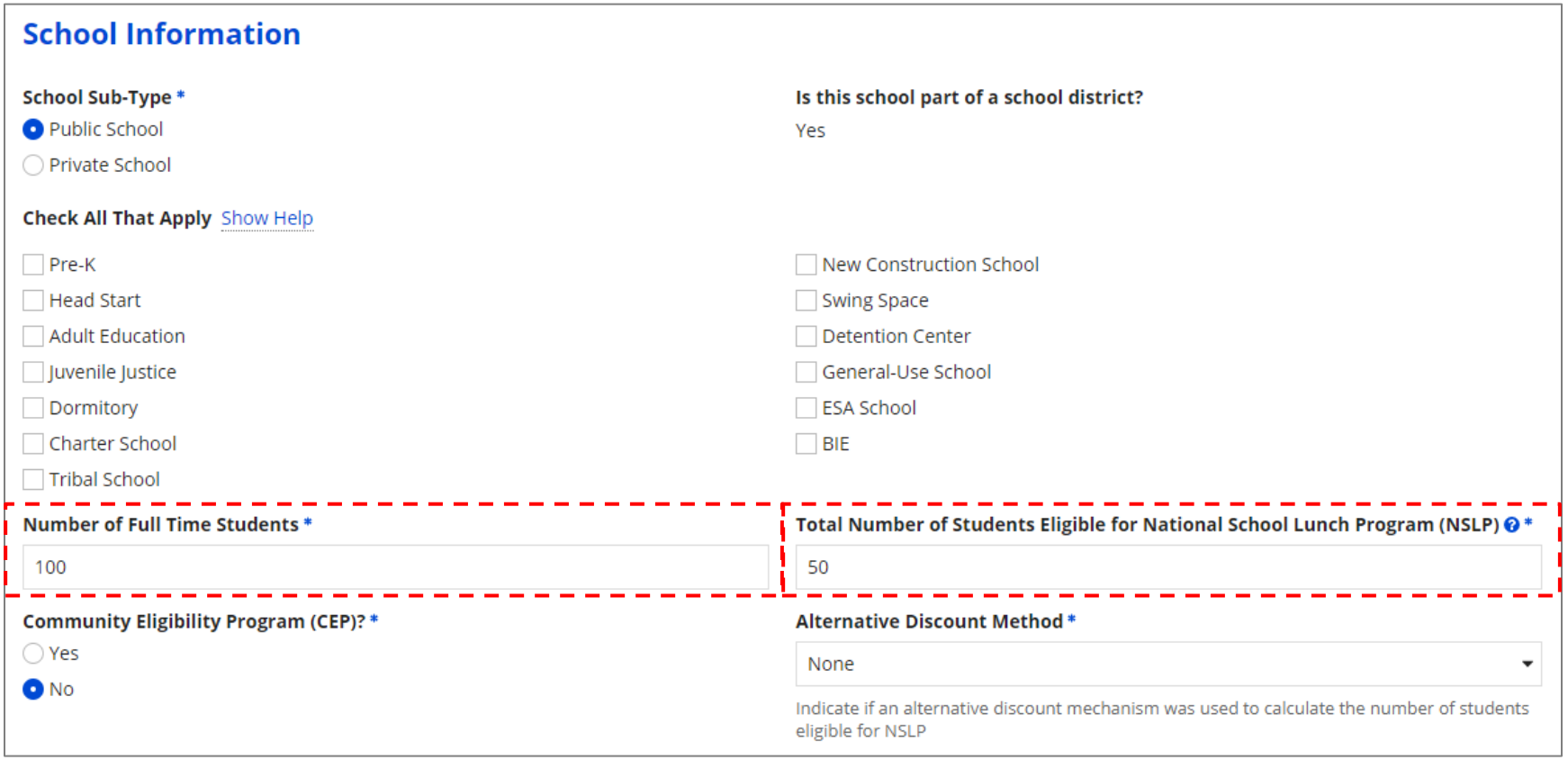
Districts: NSLP Data



At a minimum, you should annually update:

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

Districts: NSLP Data



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.

Districts: NSLP Data

Number of Full Time Students *
110

Total Number of Students Eligible for National School Lunch Program (NSLP) *
60

Community Eligibility Program (CEP)? *
- ○ Yes
- ◉ No

Alternative Discount Method *
None

Indicate if an alternative discount mechanism was used to calculate the number of students eligible for NSLP

Does this organization have an endowment? *
- ○ Yes
- ◉ No

State School Code

State LEA Code

NCES Public State Code

NCES Public District Code

NCES Public Building Code

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 Budget *
120

FCC Registration Number
1234564560

CANCEL

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

SUBMIT

Districts: NSLP Data

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

Districts: NSLP Data

⑧ Click on the “SUBMIT” button

Districts: NSLP Data

Records / Applicant Entities

#117 - School District 6 School A

MANAGE ORGANIZATION | MANAGE ANNEXES

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Organization Details

Name School District 6 School A

Entity Number 117

FCC Registration Number 1234564560

Applicant Type School

Status Active

Contact Information

Physical Address 123 South Street
Springfield, ME 04487
Washington

Mailing Address 123 South Street
Springfield, ME 04487
Washington

Phone Number 555-555-5556

Email school.district6.user1@mailinator.com

Website URL

Applicant Information

Latitude Not Found

Longitude Not Found

Urban/Rural Status Not Found

School Sub-Type

- [x] Public School
- [ ] Private School
- [ ] Pre-K
- [ ] Head Start
- [ ] Adult Education
- [ ] Juvenile Justice
- [ ] Dormitory
- [ ] Charter School
- [ ] Tribal School
- [ ] New Construction School
- [ ] Swing Space
- [ ] Detention Center
- [ ] General-Use School
- [ ] ESA School

User-Entered Latitude

User-Entered Longitude

User-Entered Urban/Rural Status Rural

Community Eligibility Program (CEP)? No

Alternative Discount Method None

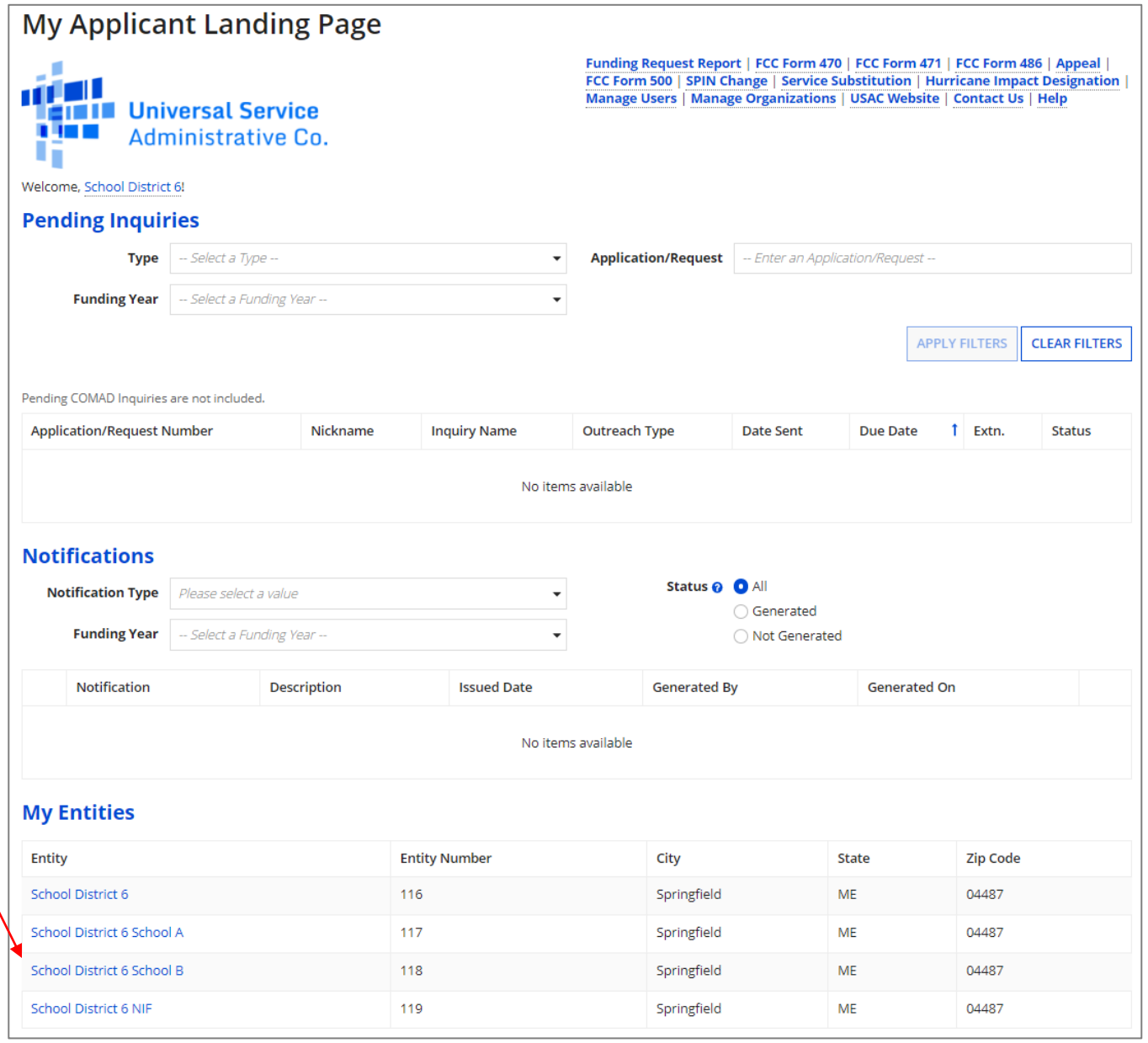
Does this organization have an endowment? No

Number of Full Time Students 110

Total Number of Students Eligible for National School Lunch Program (NSLP) 60

The summary page will re-display with the updated NSLP information

Districts: NSLP Data



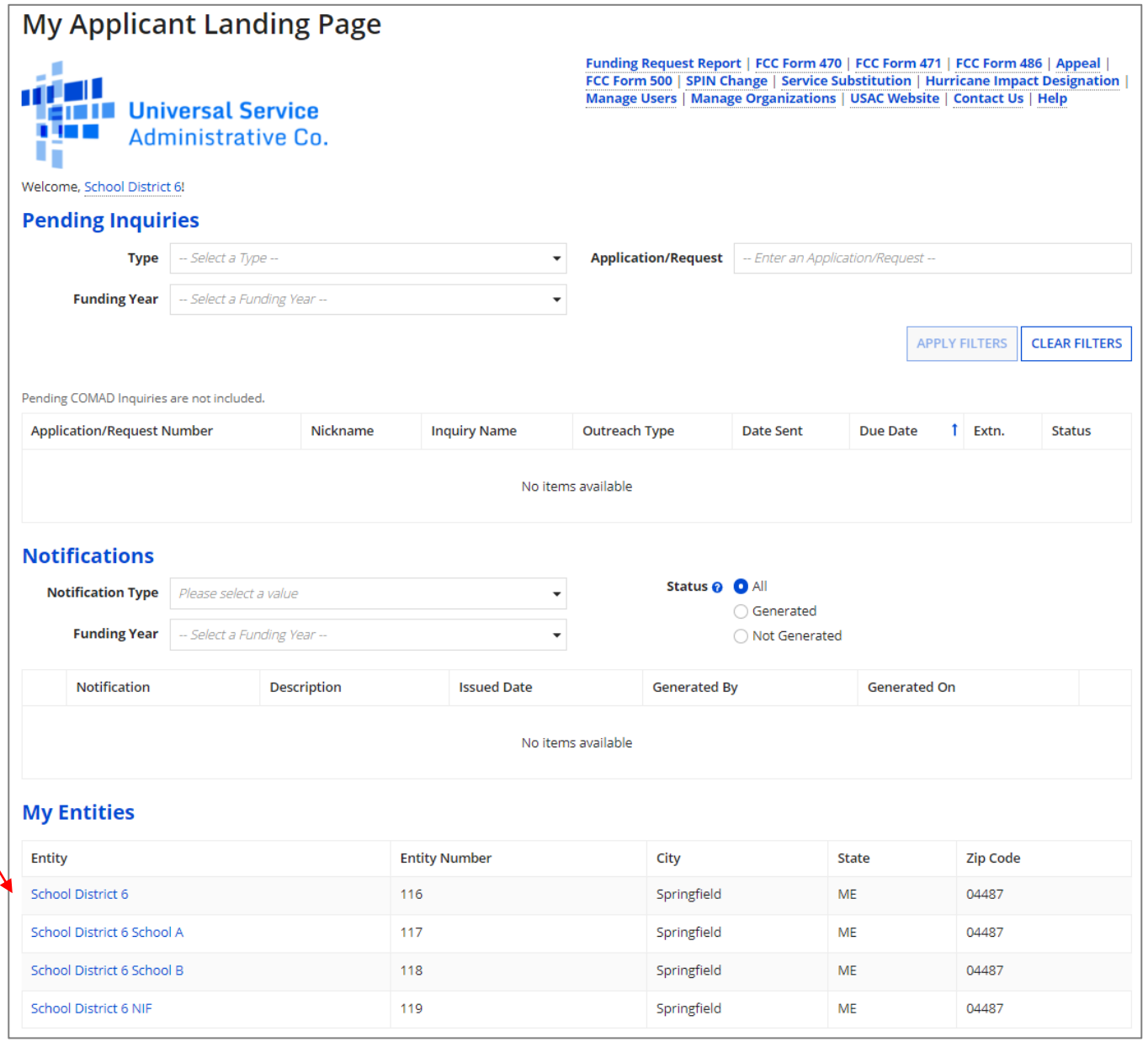
⑨ Repeat this process for each school in your organization

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

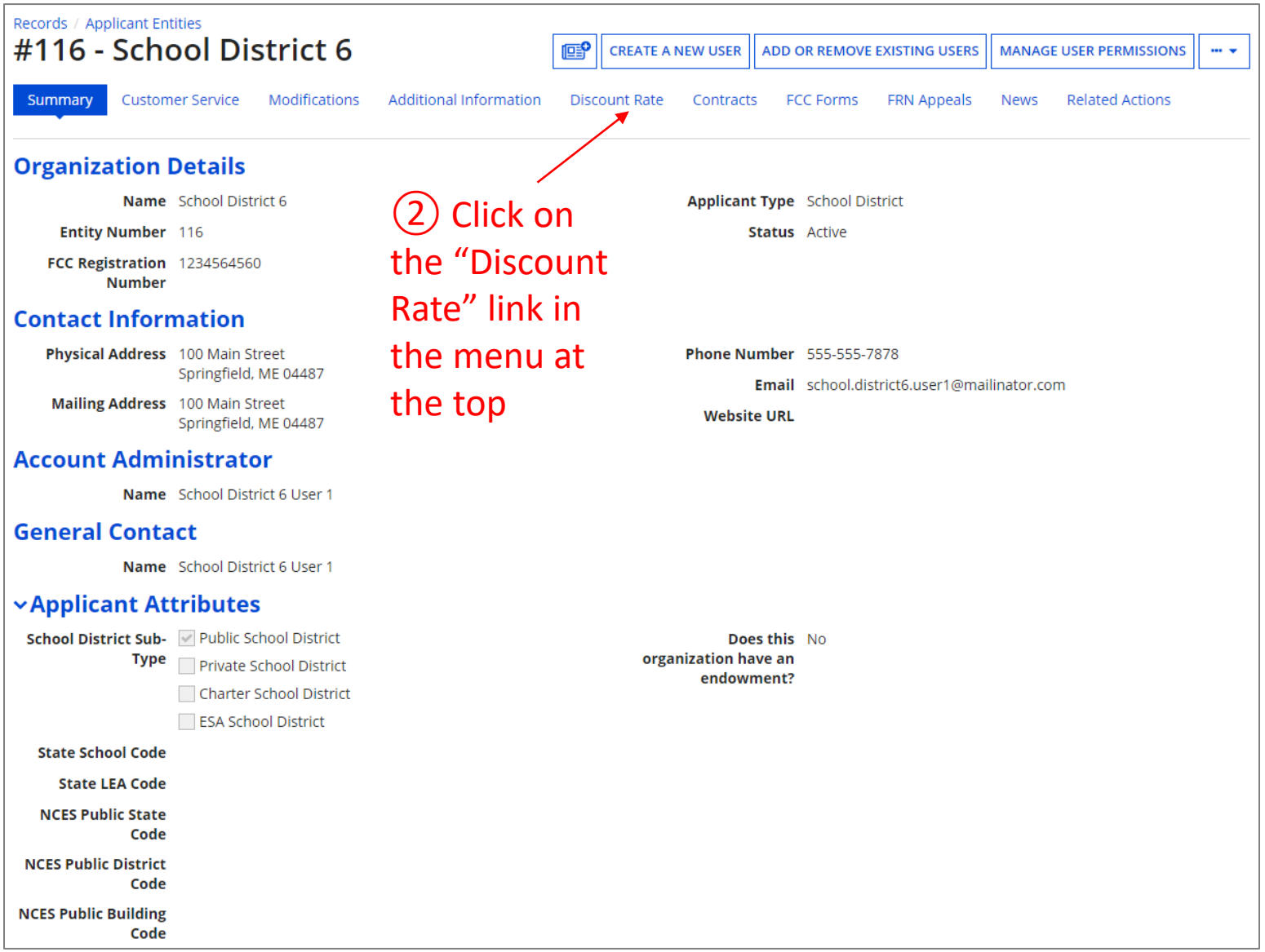
School Districts:
Checking for Discount Rate Errors

Districts: Discount Errors

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



Districts: Discount Errors

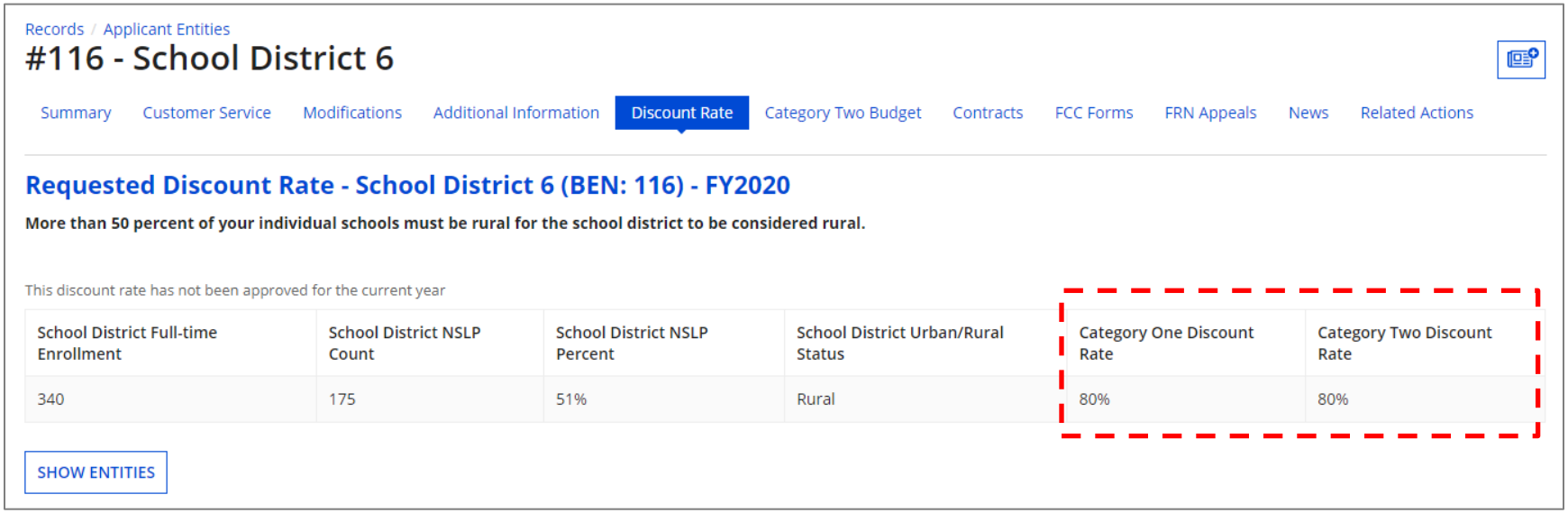


Districts: Discount Errors

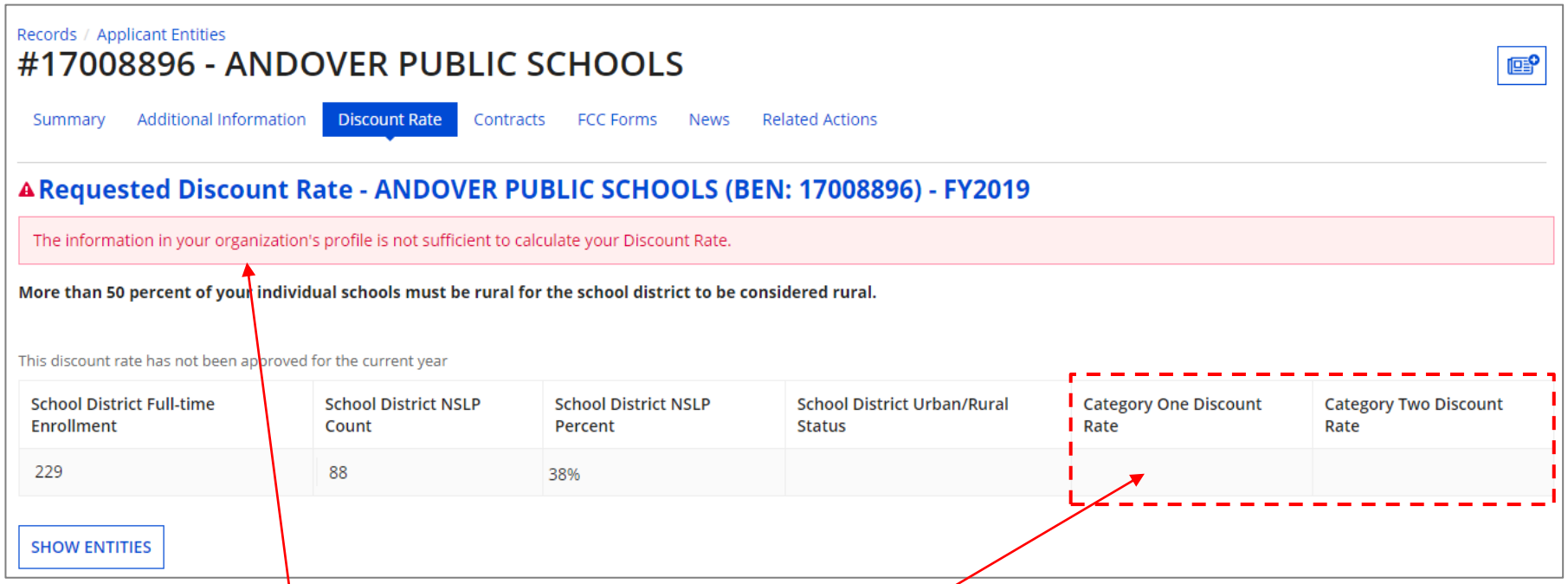
The discount rate for the school district displays

NOTE:

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

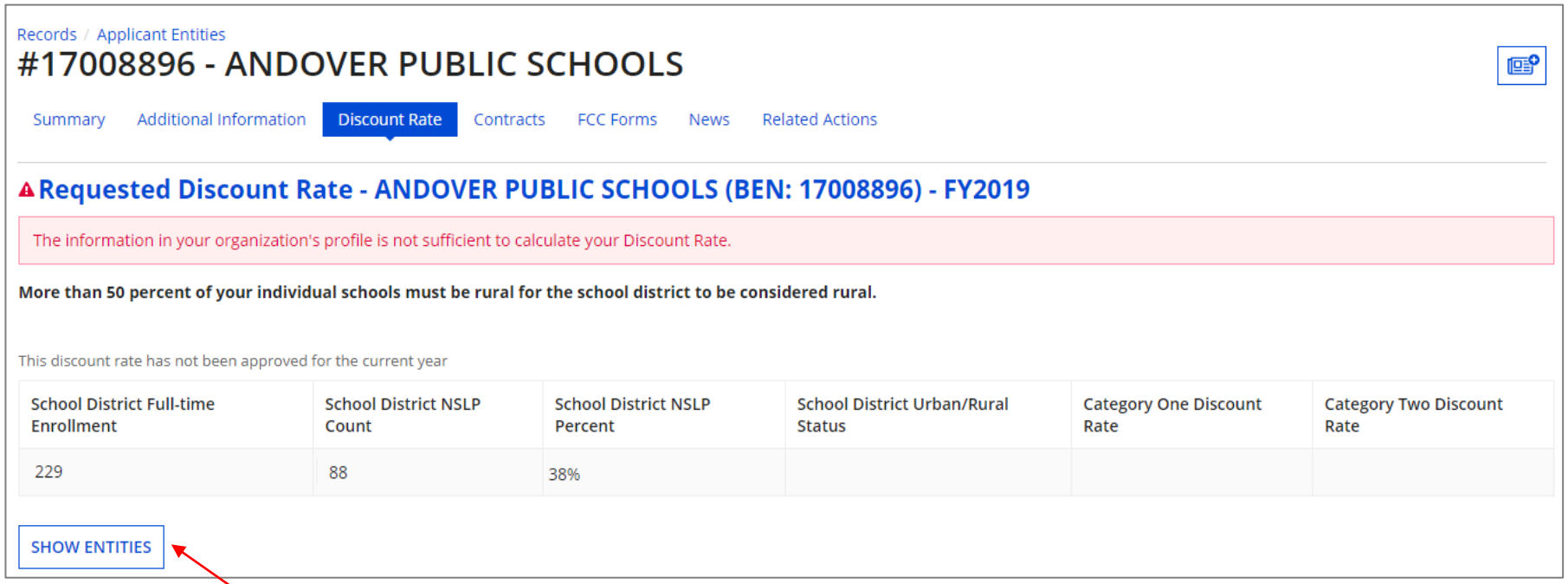


Districts: Discount Errors



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

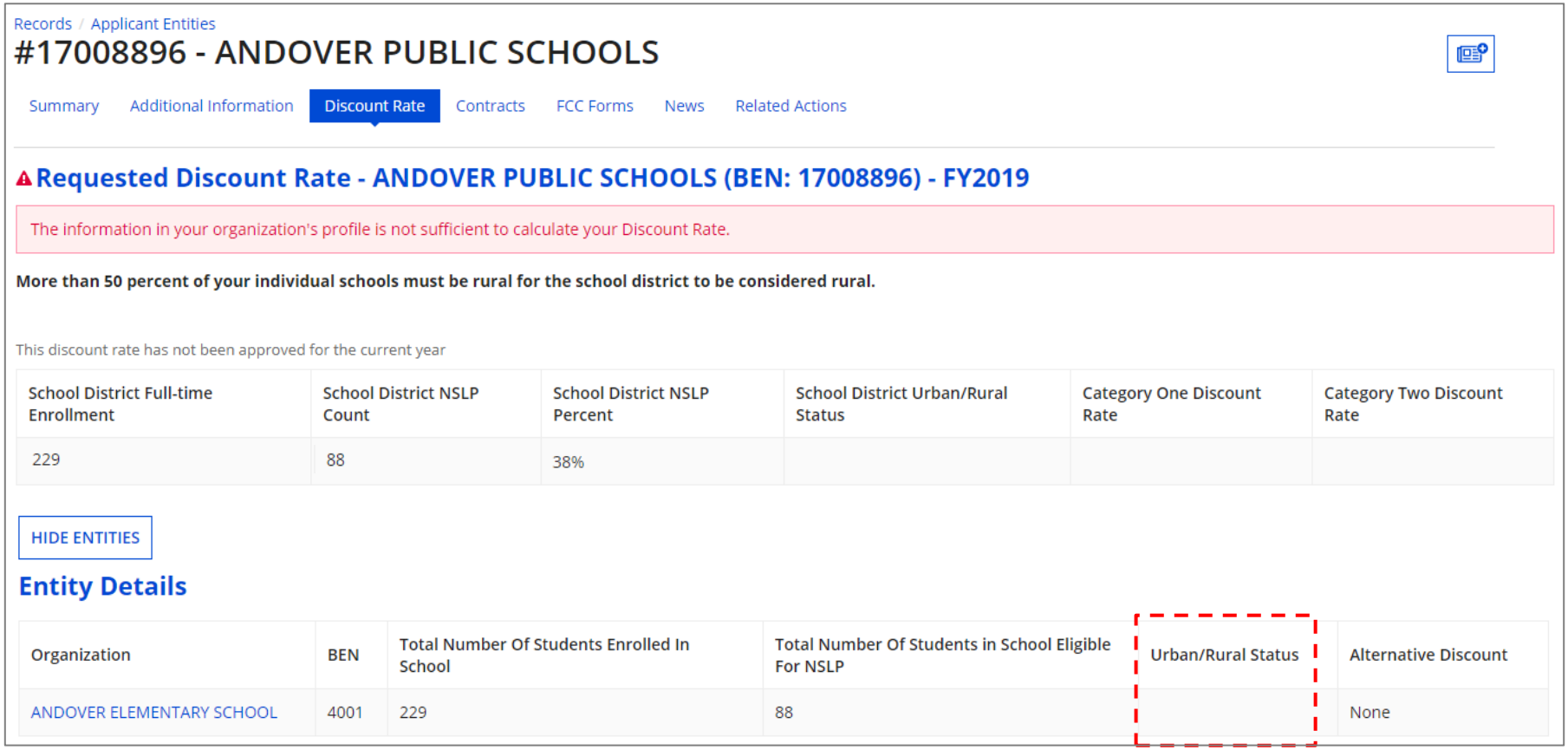
Districts: Discount Errors



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

Districts: Discount Errors

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



Records / Applicant Entities

#17008896 - ANDOVER PUBLIC SCHOOLS

Summary | Additional Information | Discount Rate | Contracts | FCC Forms | News | Related Actions

Requested Discount Rate - ANDOVER PUBLIC SCHOOLS (BEN: 17008896) - FY2019

The information in your organization's profile is not sufficient to calculate your Discount Rate.

More than 50 percent of your individual schools must be rural for the school district to be considered rural.

This discount rate has not been approved for the current year

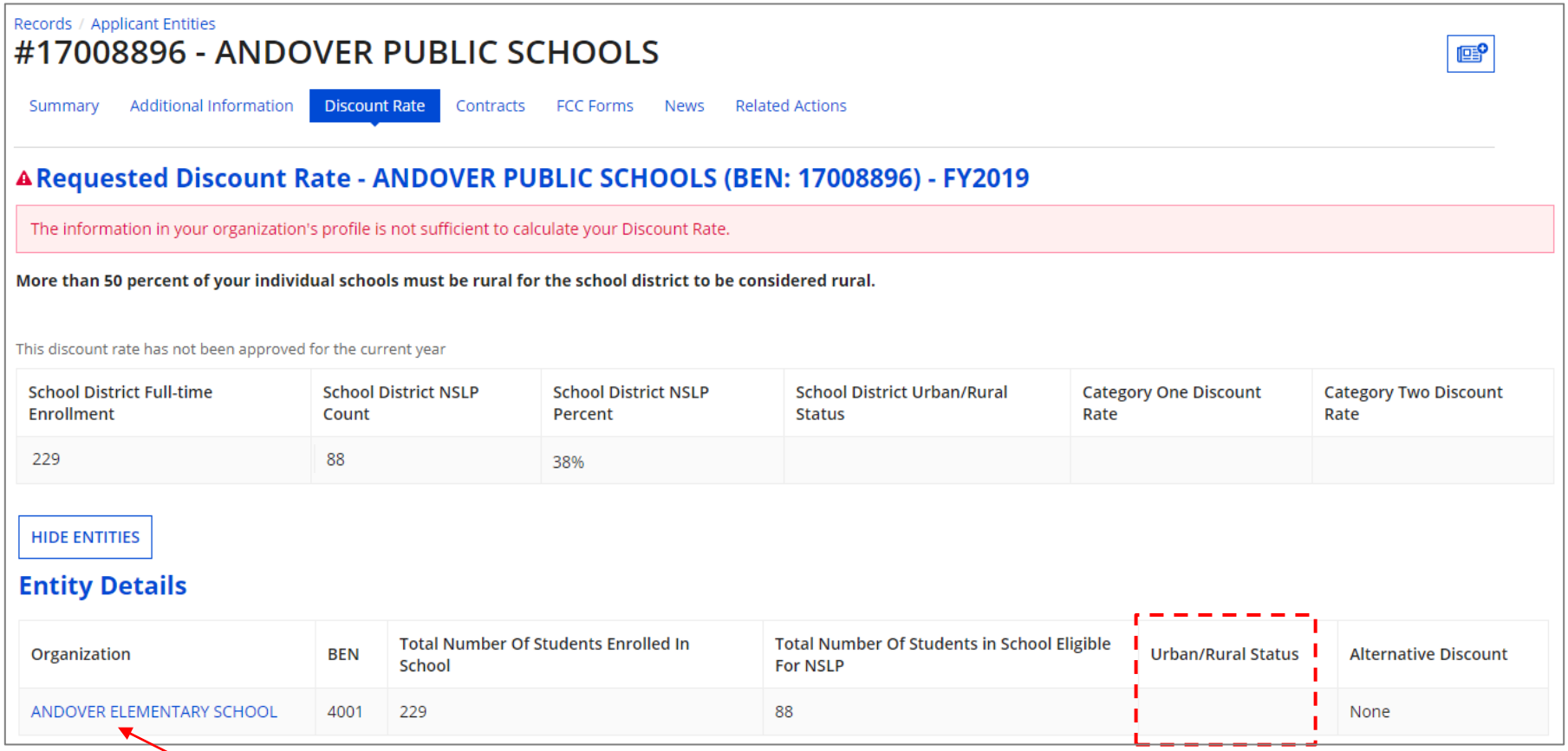
School District Full-time Enrollment	School District NSLP Count	School District NSLP Percent	School District Urban/Rural Status	Category One Discount Rate	Category Two Discount Rate
229	88	38%			

HIDE ENTITIES

Entity Details

Organization	BEN	Total Number Of Students Enrolled In School	Total Number Of Students in School Eligible For NSLP	Urban/Rural Status	Alternative Discount
ANDOVER ELEMENTARY SCHOOL	4001	229	88		None

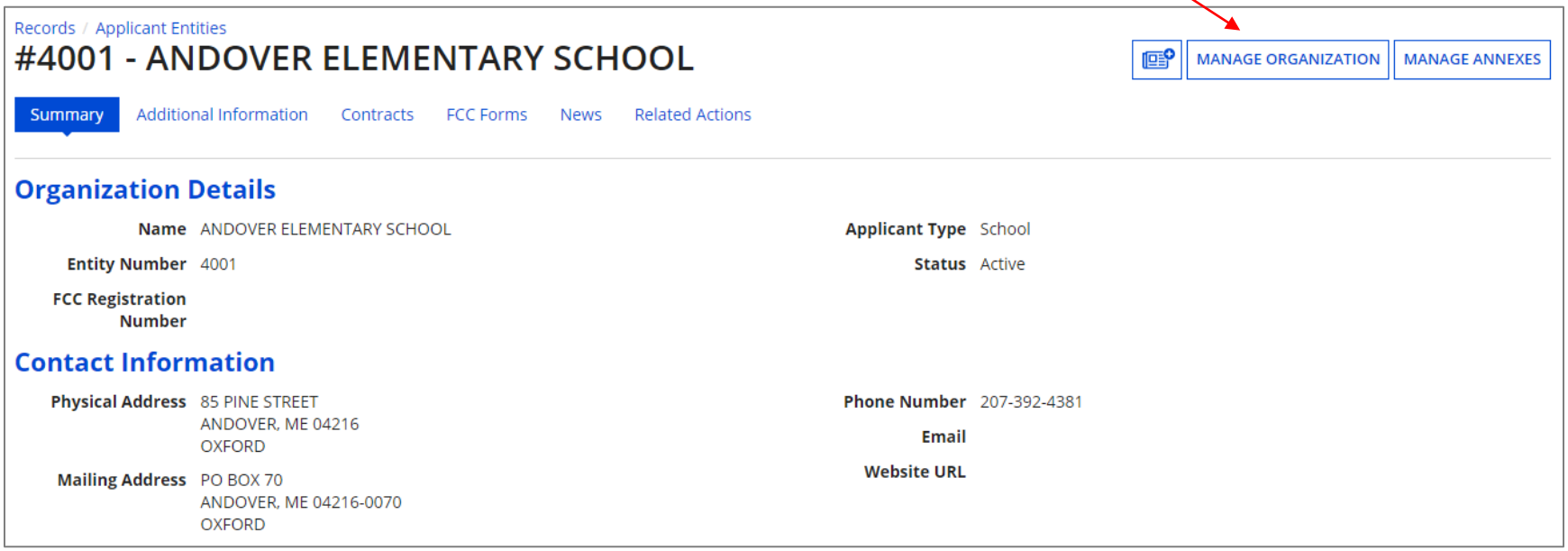
Districts: Discount Errors



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

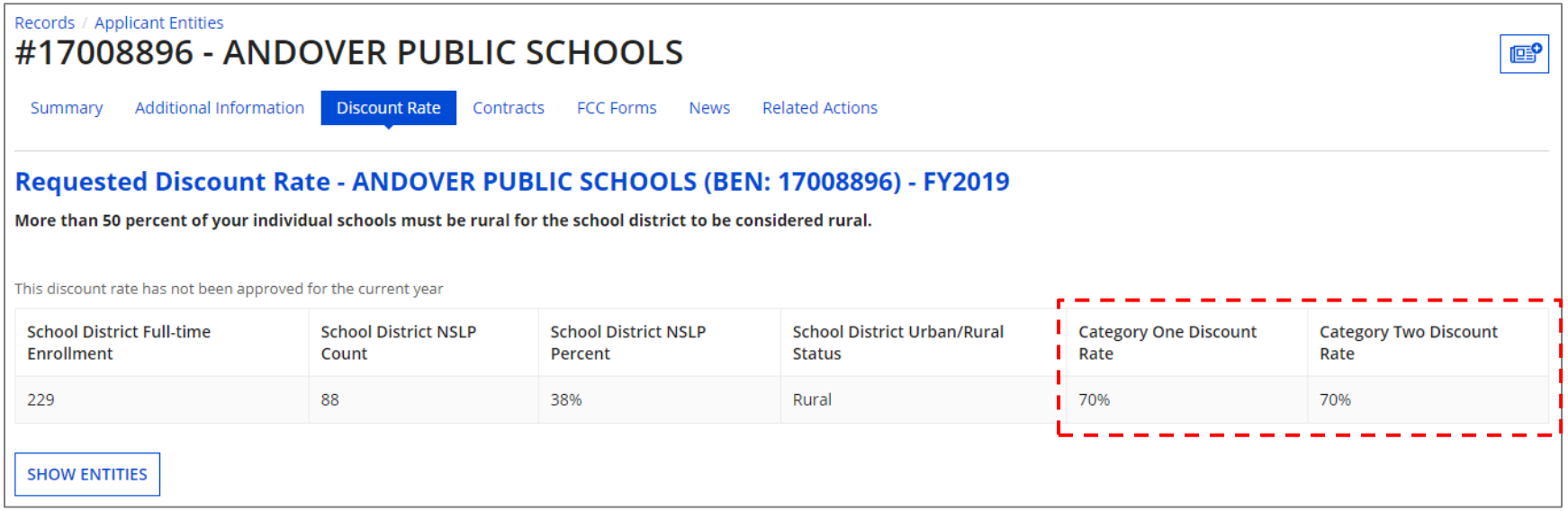
Districts: Discount Errors

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



Districts: Discount Errors

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 |←
→| OPTIONAL SUBSEQUENT YEARS |←

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.

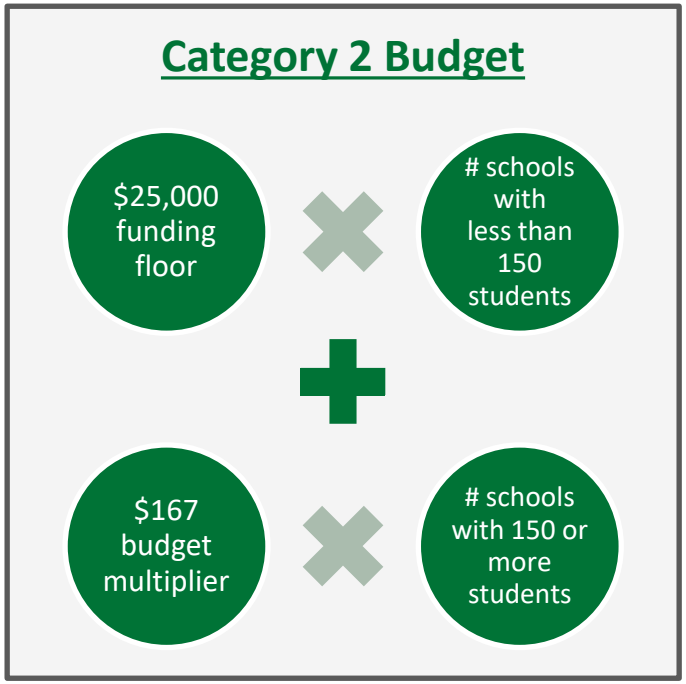
If you previously entered C2 enrollment data for the FY2021 – FY2025 cycle, you are not required to update it unless you wish to in order to take advantage of increased enrollment numbers.

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

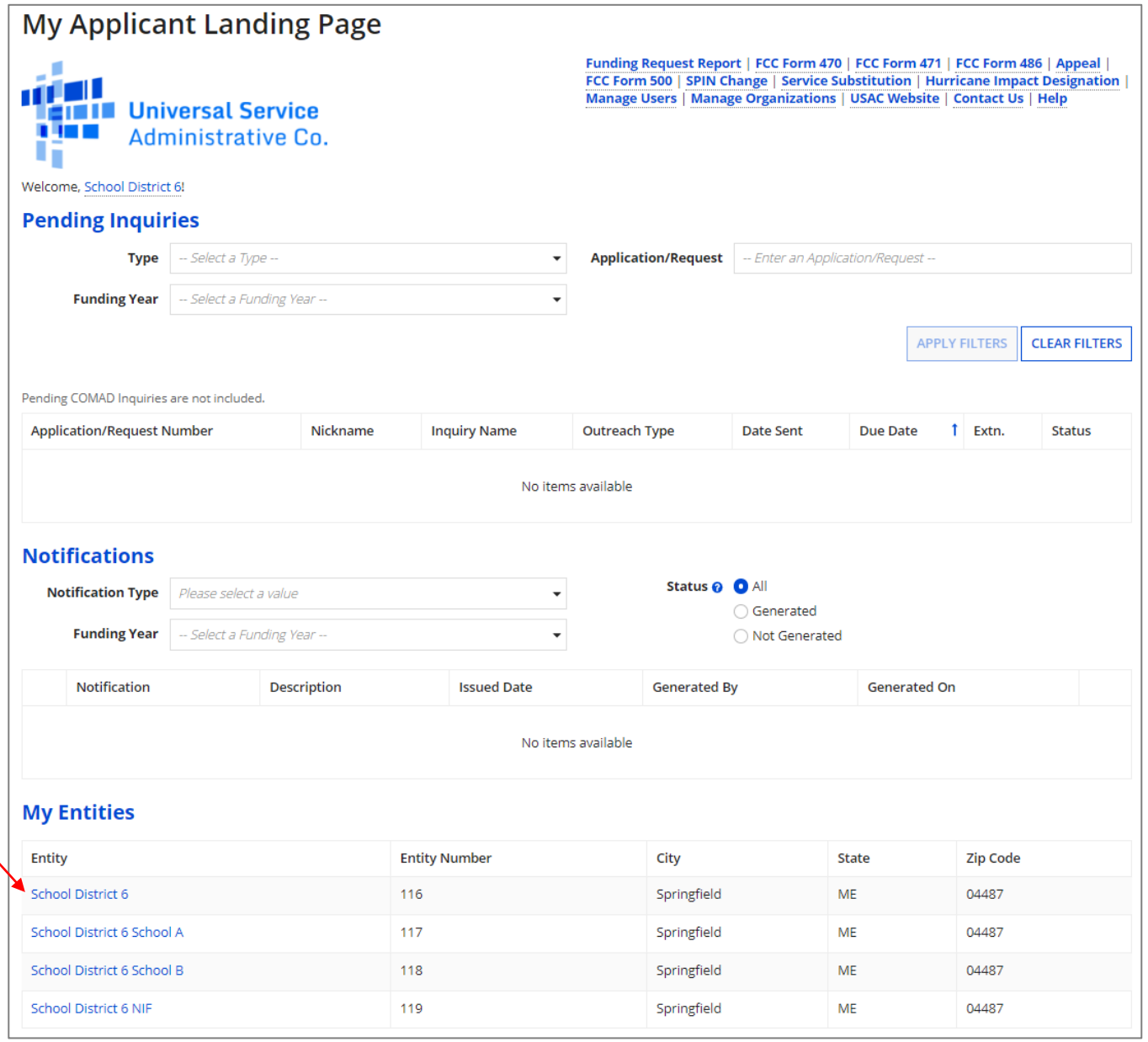
Doing so allows you to take advantage of the higher budget amount for each building (the funding floor VS the budget multiplier * enrollment)

district with 10 or fewer sites >>>



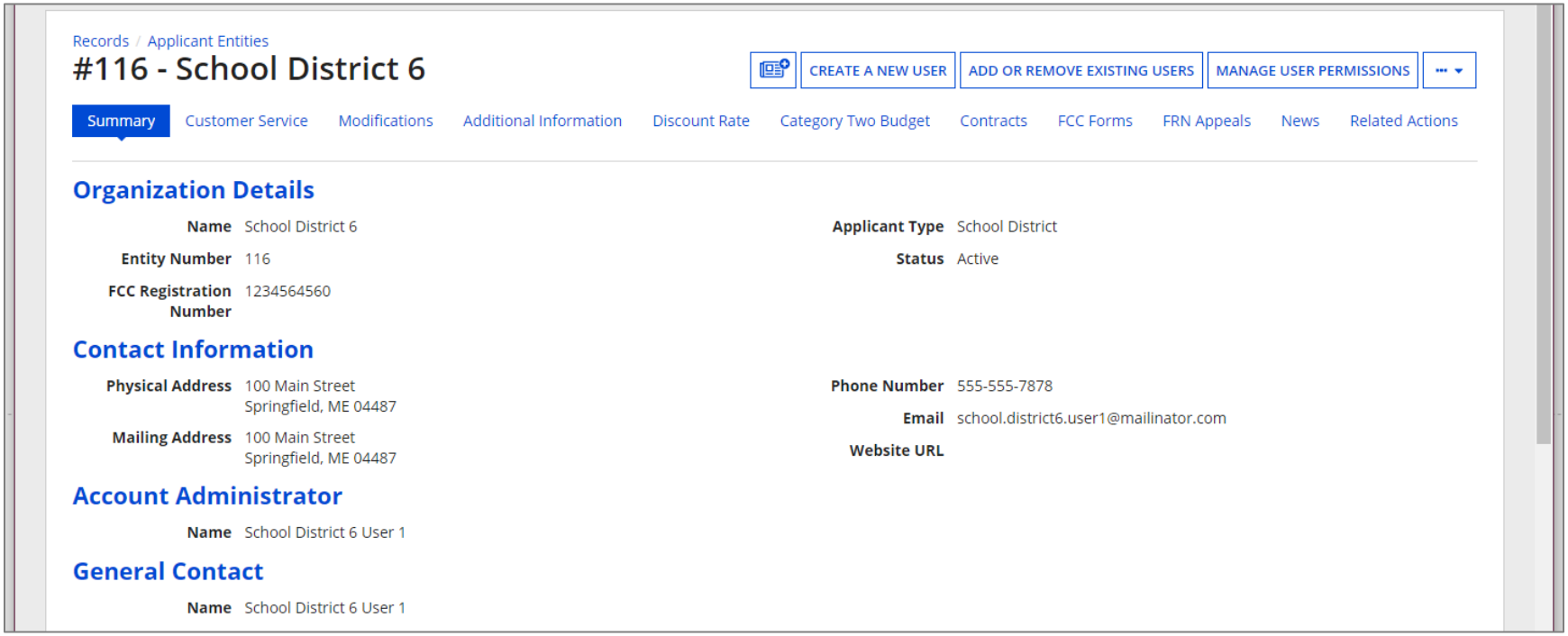
Districts: C2 Data By School

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

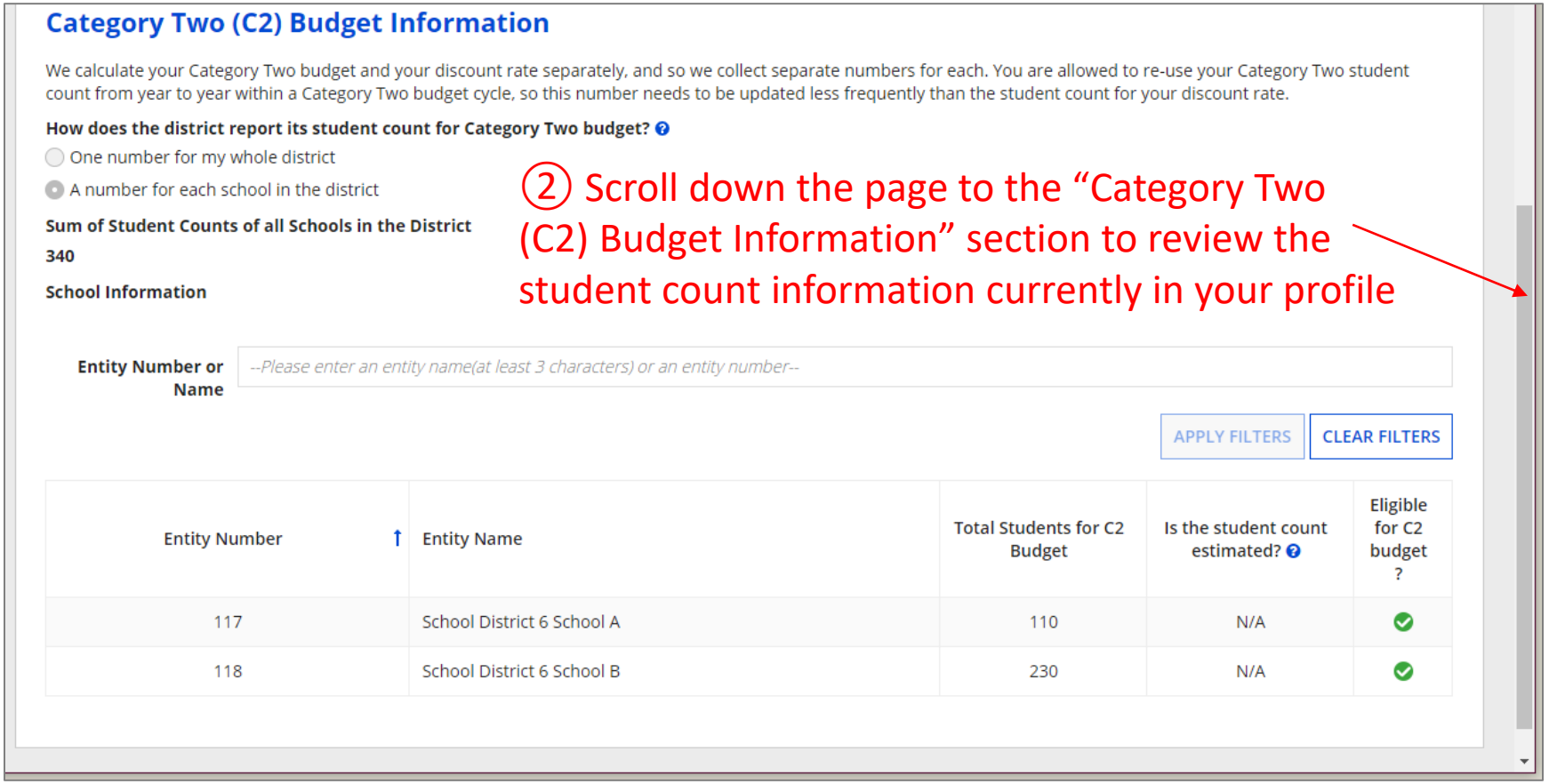


Districts: C2 Data By School

The summary page for your school district will display



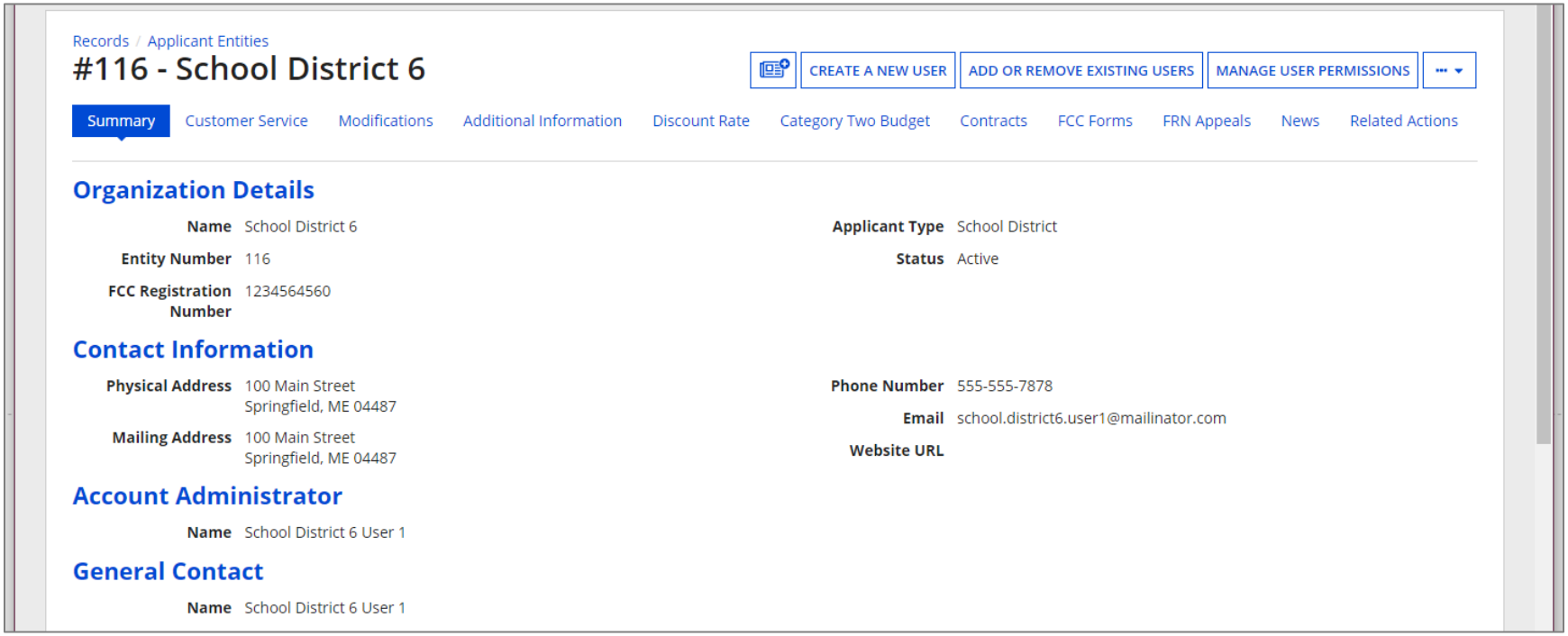
Districts: C2 Data By School



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

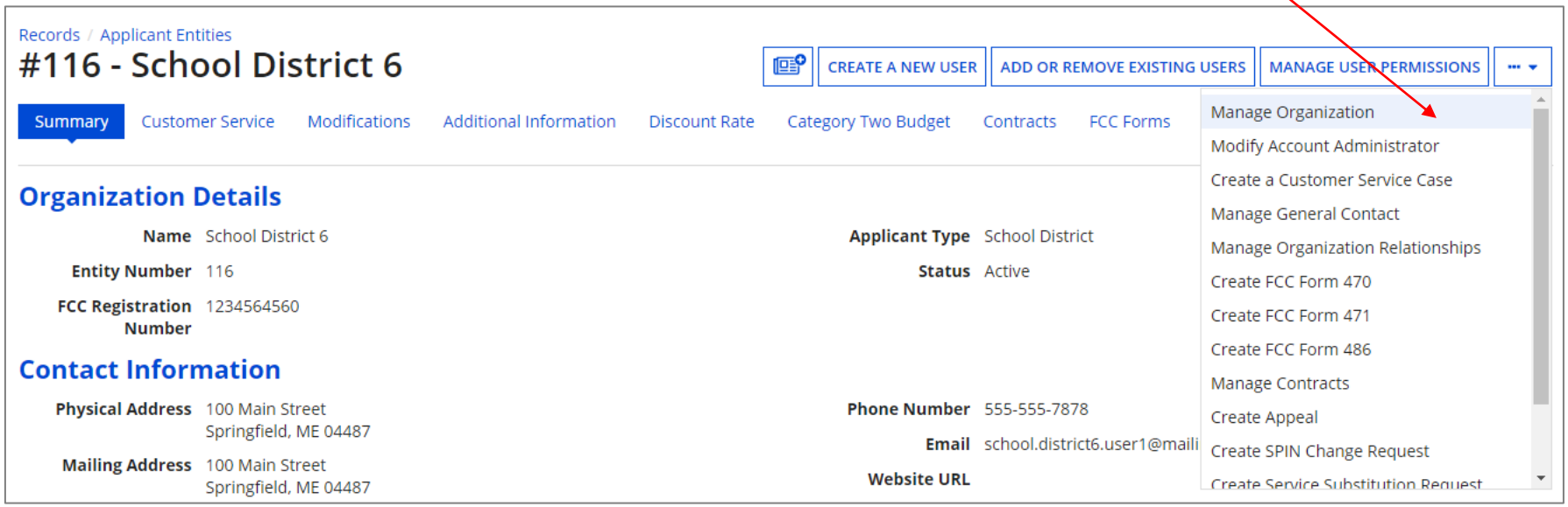
Districts: C2 Data By School

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



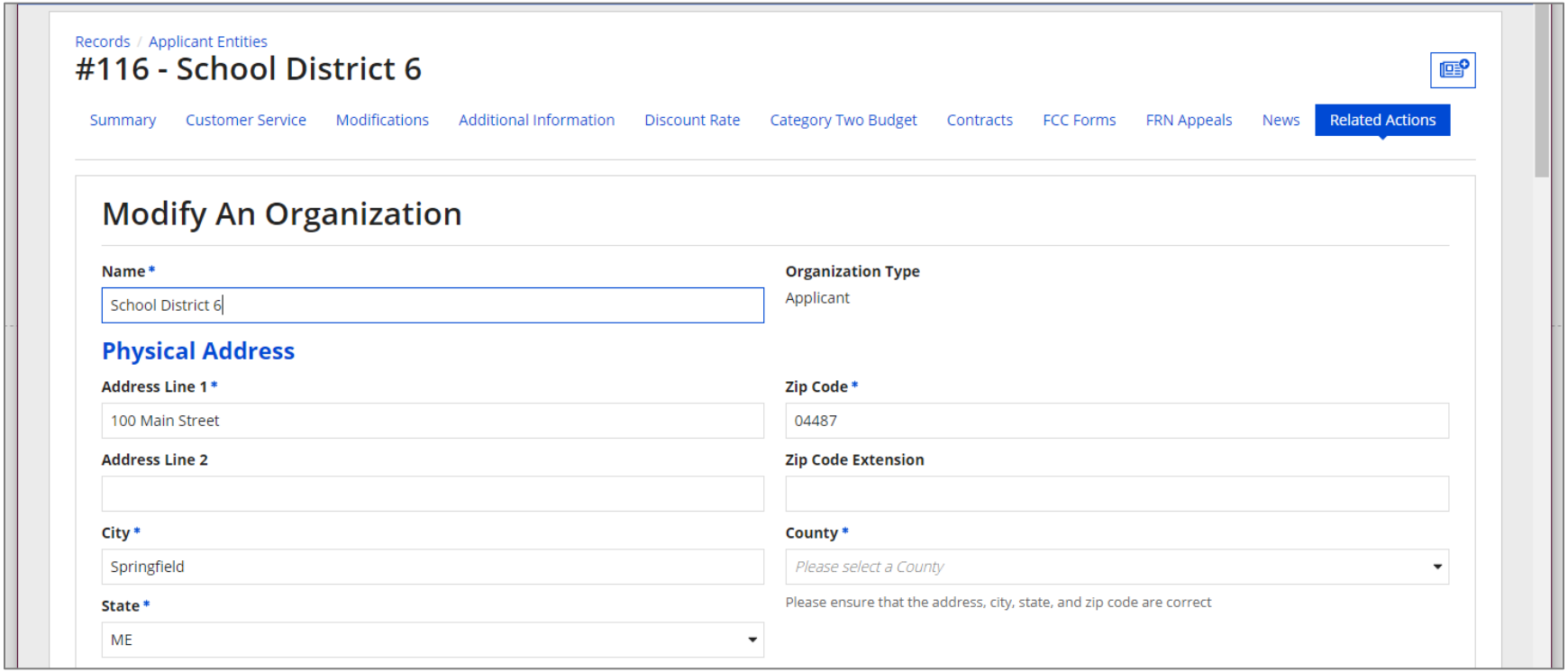
Districts: C2 Data By School

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

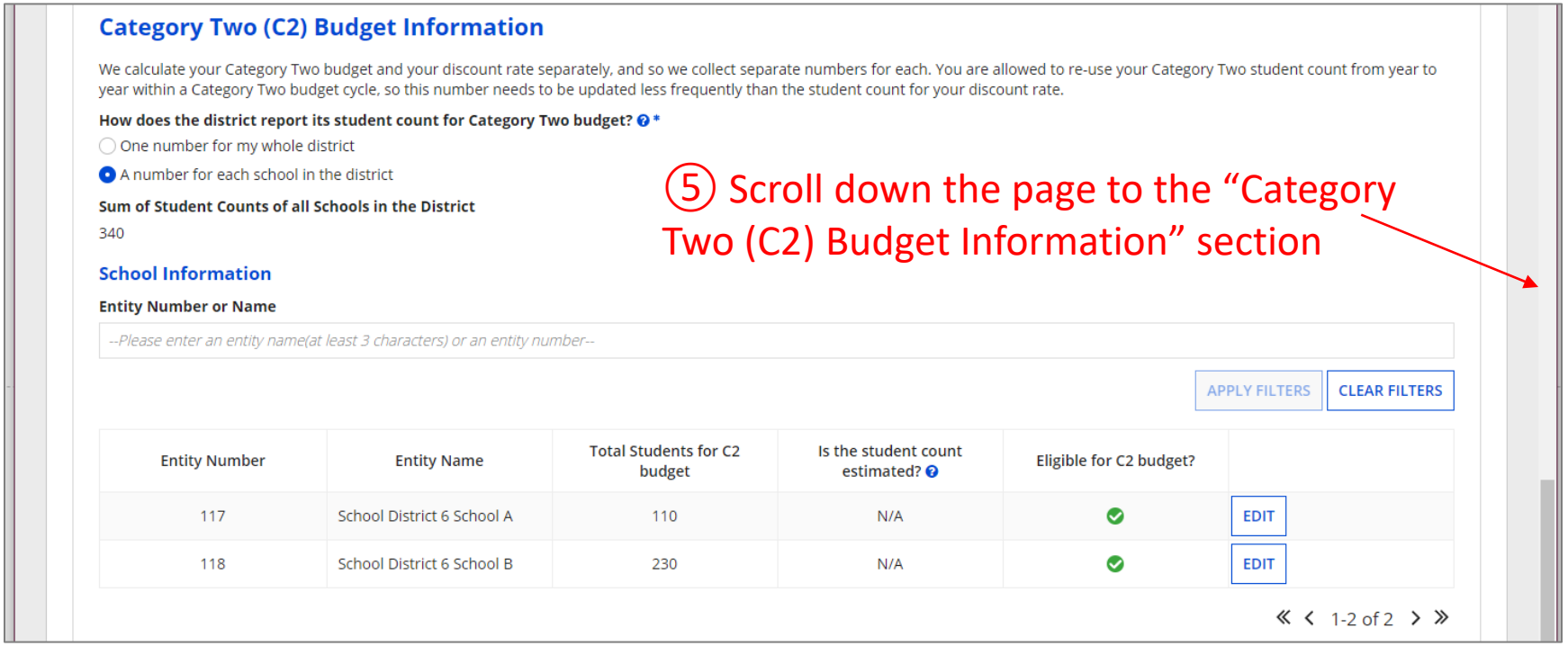


Districts: C2 Data By School

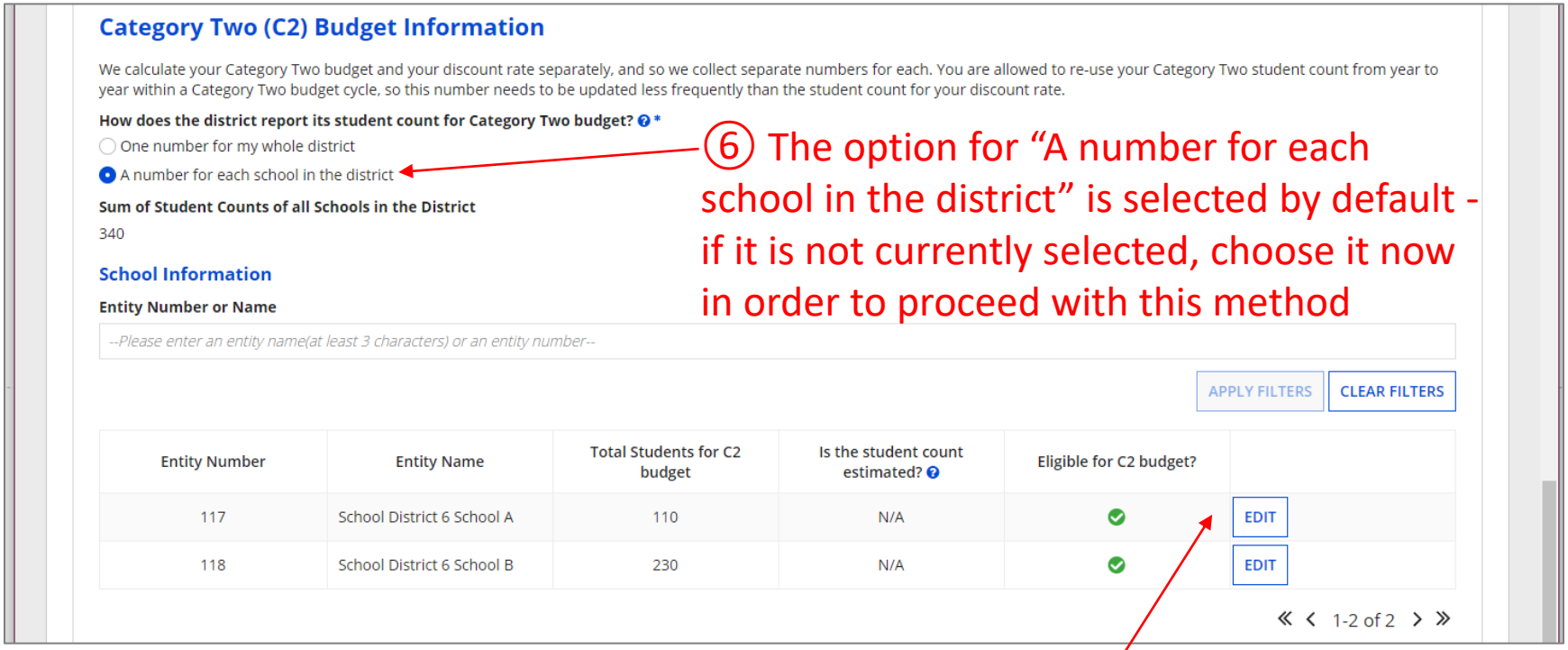
An editable version of the summary page for your school district will display



Districts: C2 Data By School



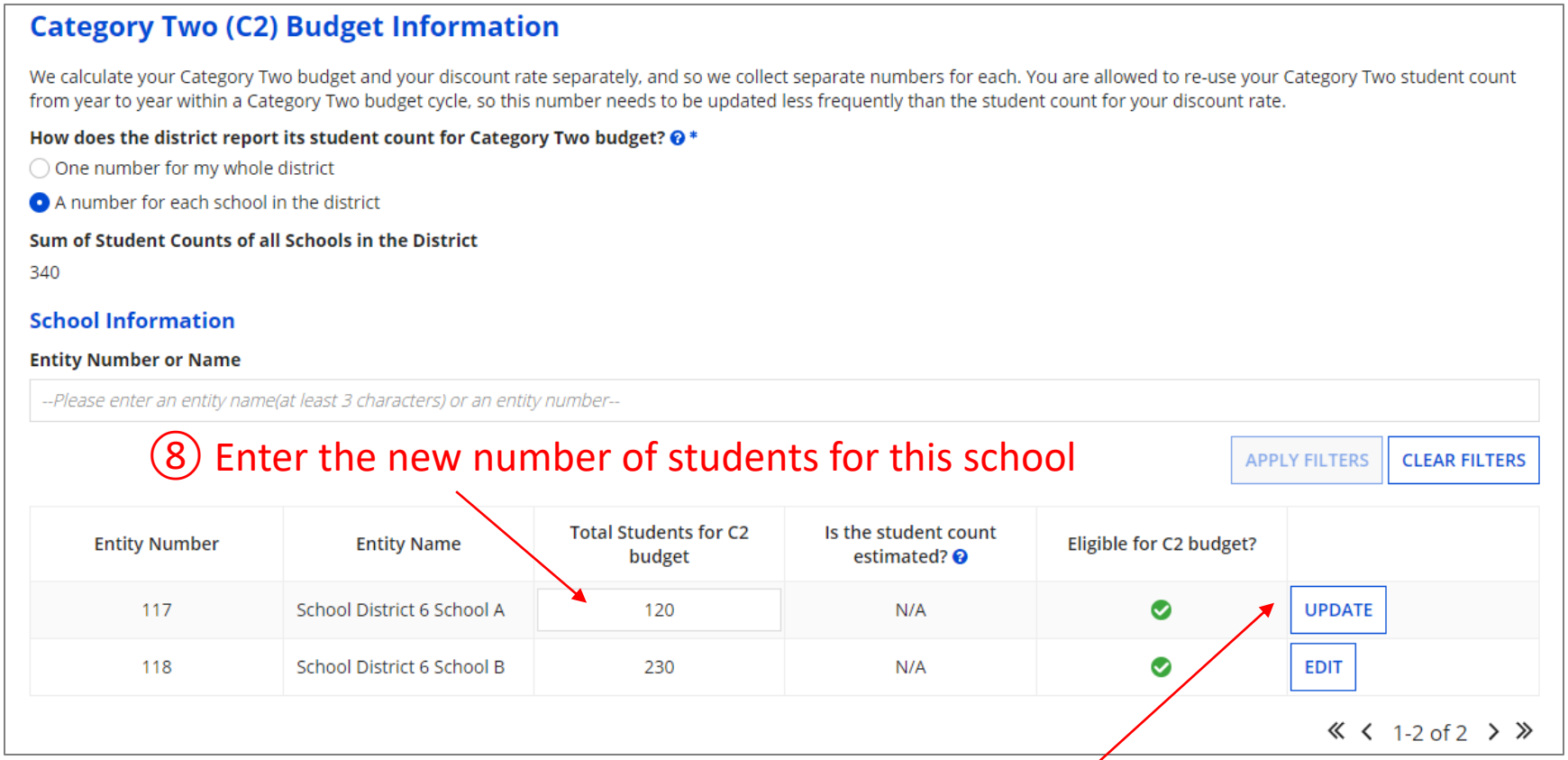
Districts: C2 Data By School



⑥ The option for "A number for each school in the district" is selected by default - if it is not currently selected, choose it now in order to proceed with this method

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

Districts: C2 Data By School



⑧ Enter the new number of students for this school

⑨ Then click on the “UPDATE” button

Districts: C2 Data By School

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

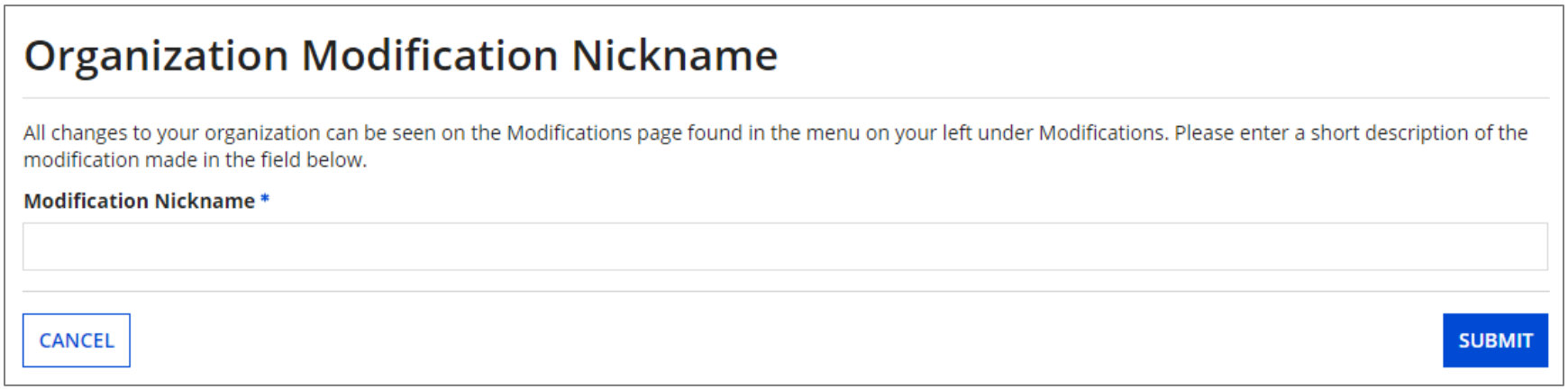
1234564560

CANCEL | SUBMIT

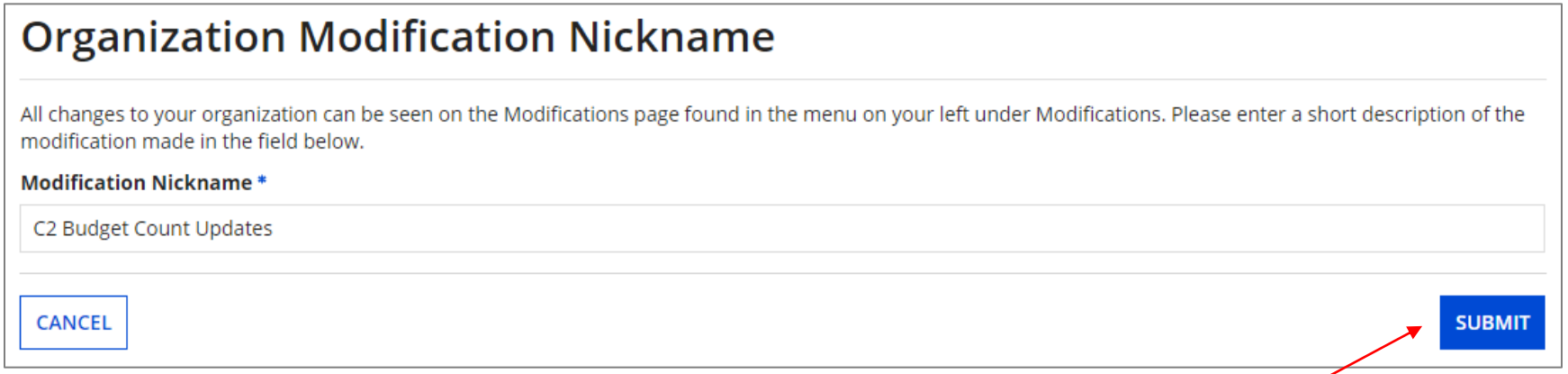
⑪ Then click on the “SUBMIT” button

Districts: C2 Data By School

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



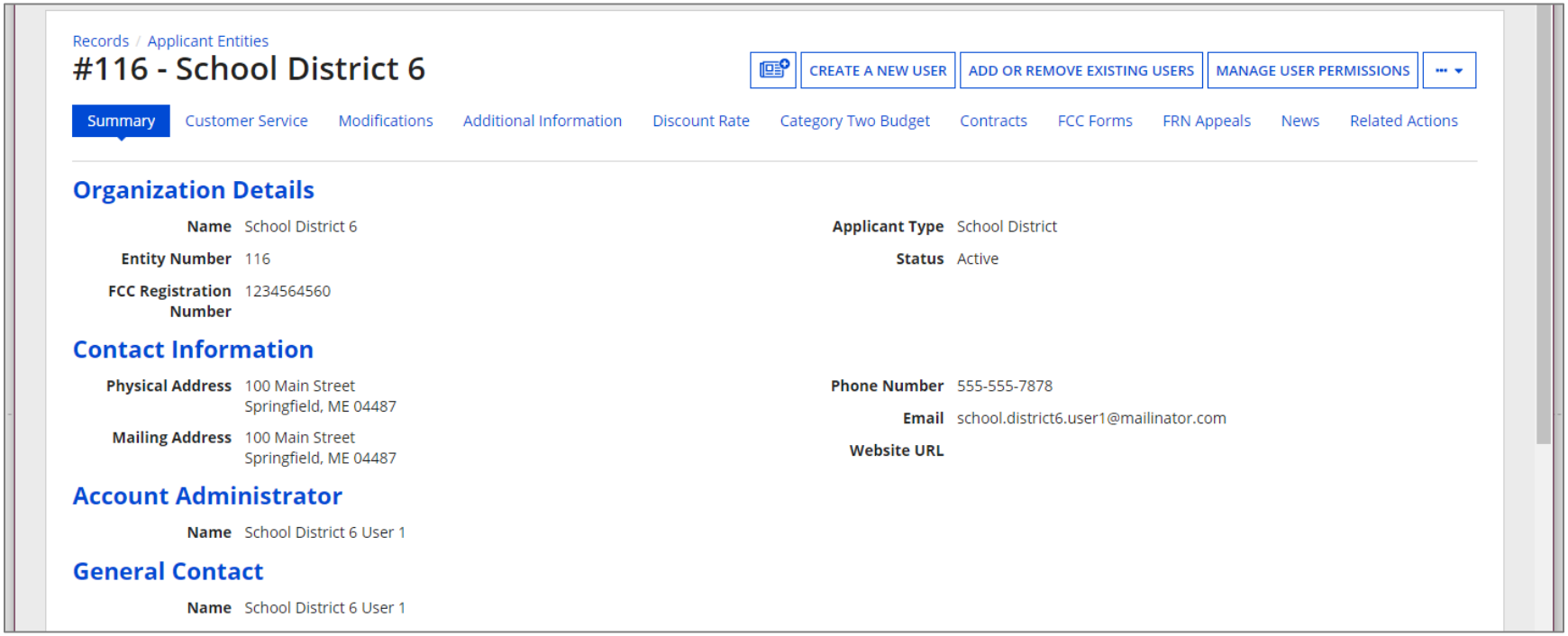
Districts: C2 Data By School



⑬ Then click on the “SUBMIT” button

Districts: C2 Data By School

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 |←
→| OPTIONAL SUBSEQUENT YEARS |←

Notes:

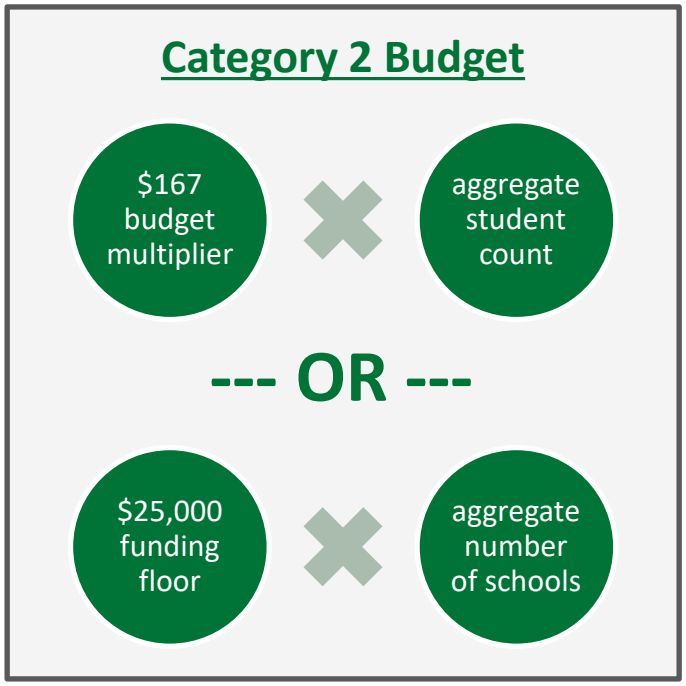
For a district with 10 or fewer schools, EPC can calculate a higher C2 budget by utilizing the funding floor if any of your schools has less than 150 students. If you opt to report your student count as one district-wide aggregate number, EPC will not allow you to do this.

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 >>>

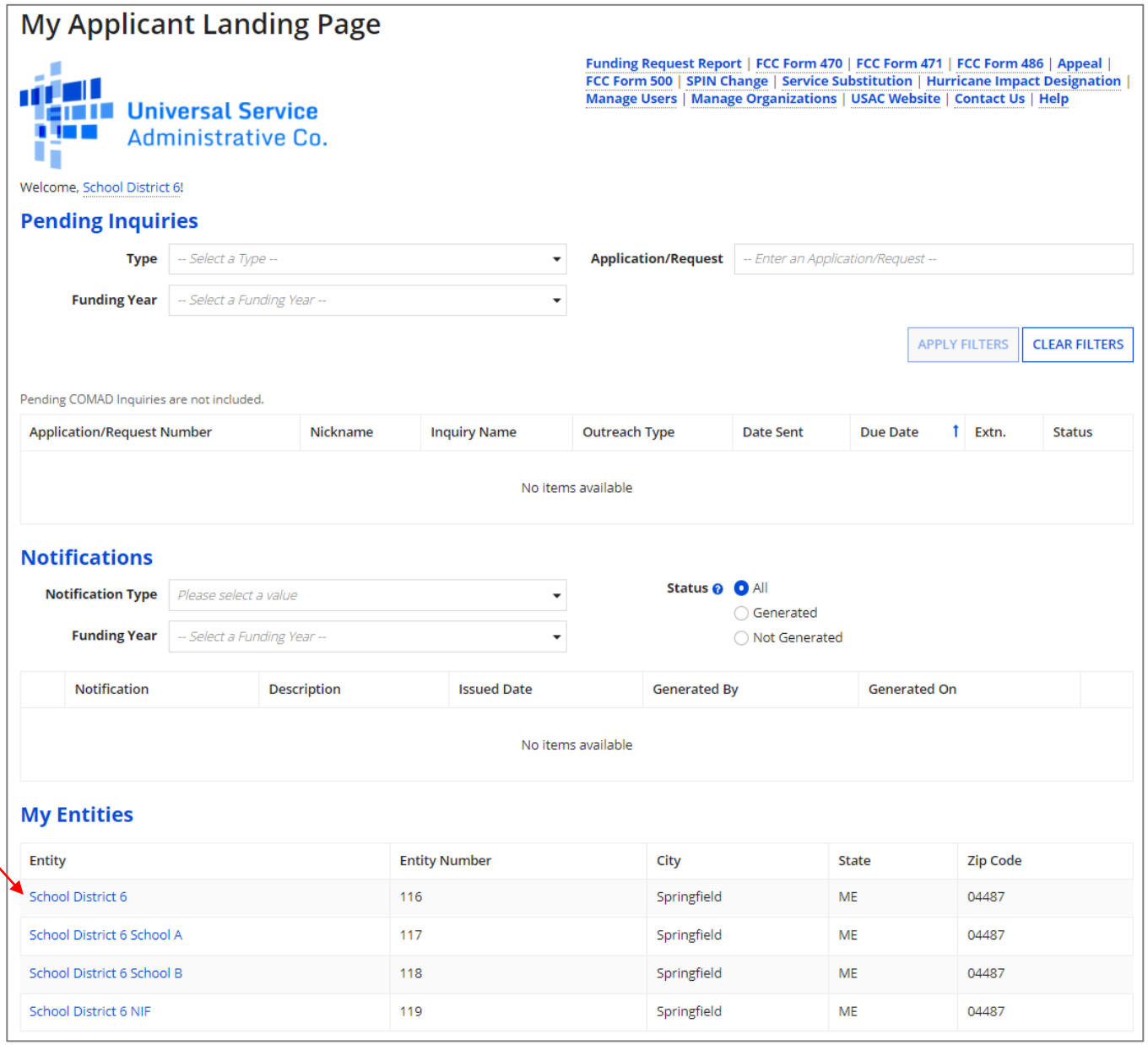


Words of Caution:
This is not advisable for districts with 10 or fewer schools!

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

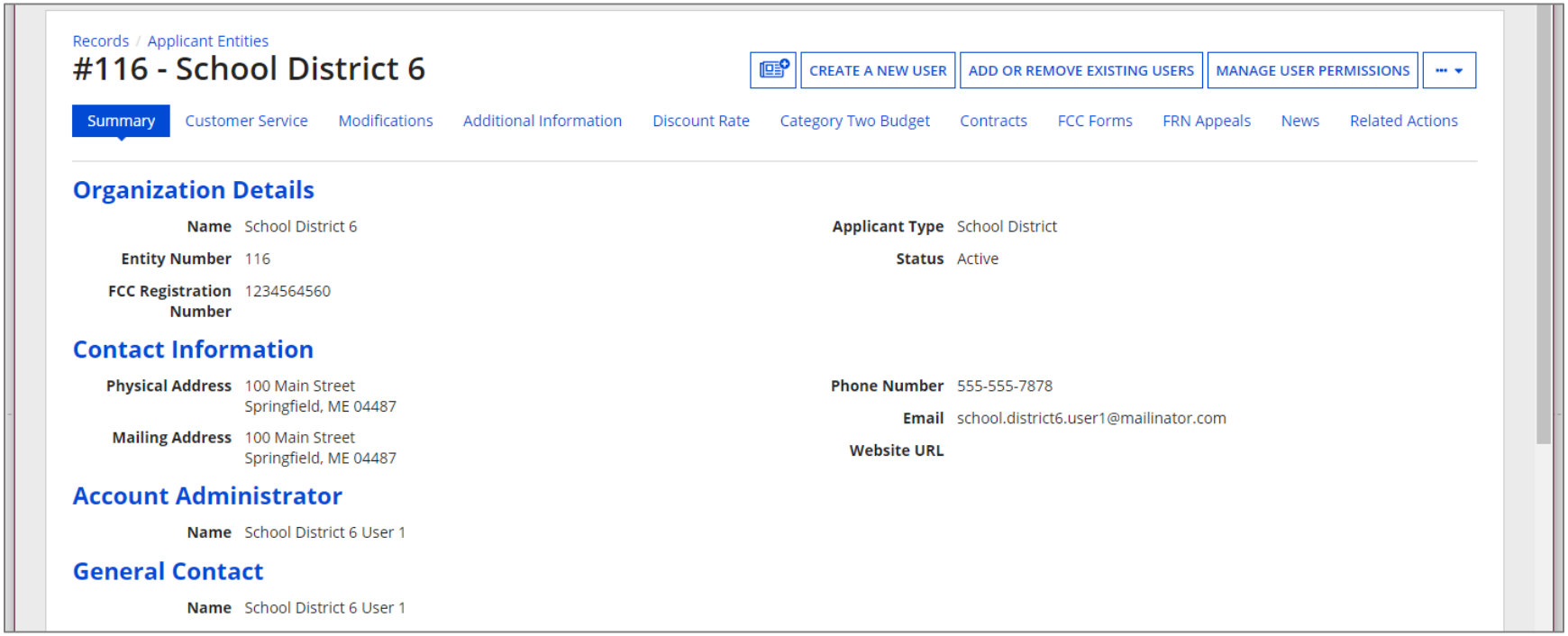
Districts: C2 Data By Aggregate



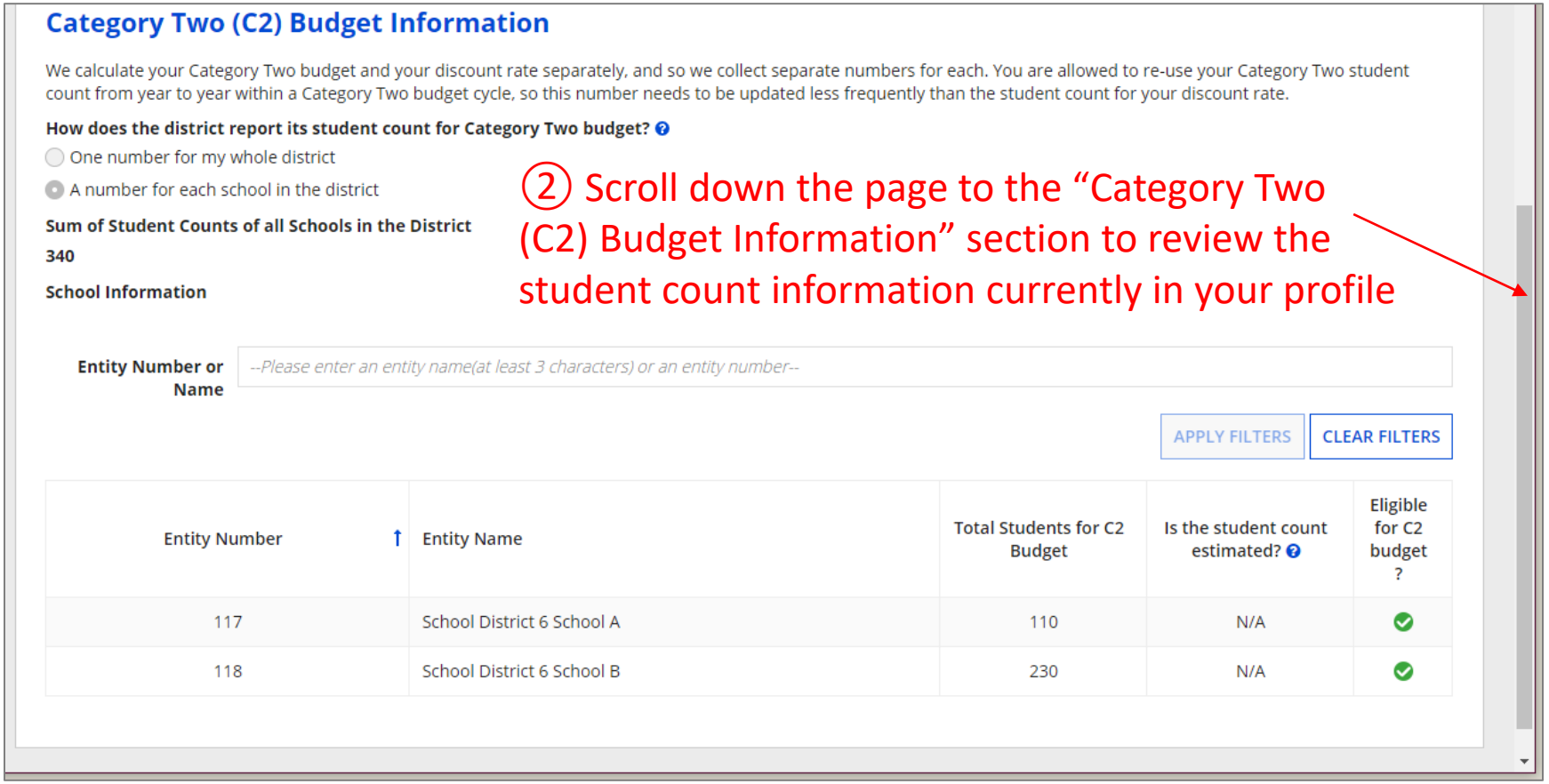
① On the Landing Page, scroll to the "My Entities" section and click on the link for your district

Districts: C2 Data By Aggregate

The summary page for your school district will display



Districts: C2 Data By Aggregate



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

School Information

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

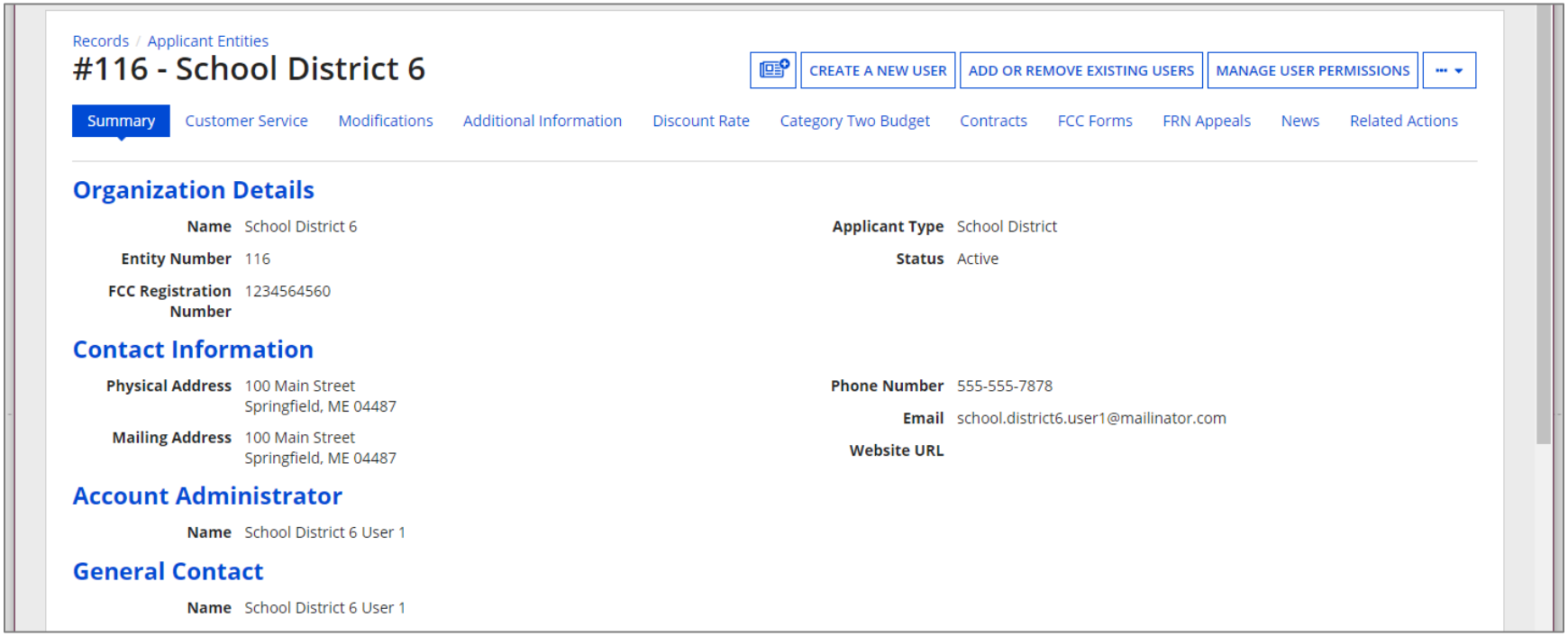
Entity Number or Name --Please enter an entity name(at least 3 characters) or an entity number--

APPLY FILTERS | CLEAR FILTERS

Entity Number	Entity Name	Total Students for C2 Budget	Is the student count estimated?	Eligible for C2 budget ?
117	School District 6 School A	110	N/A	✓
118	School District 6 School B	230	N/A	✓

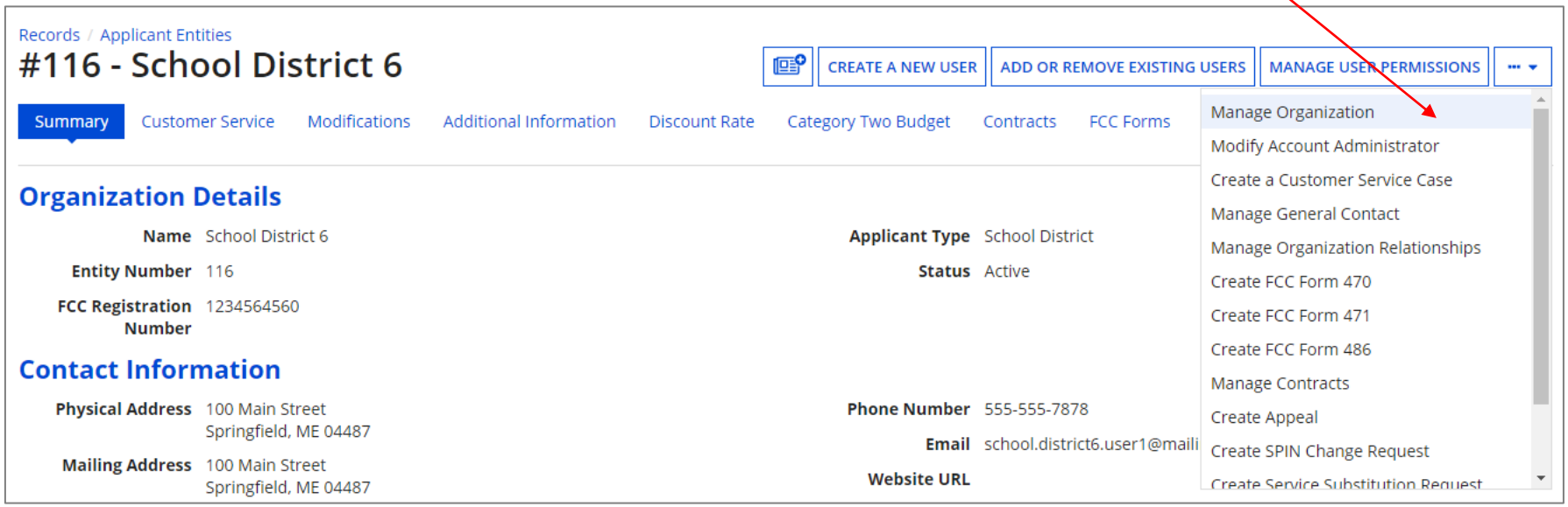
Districts: C2 Data By Aggregate

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



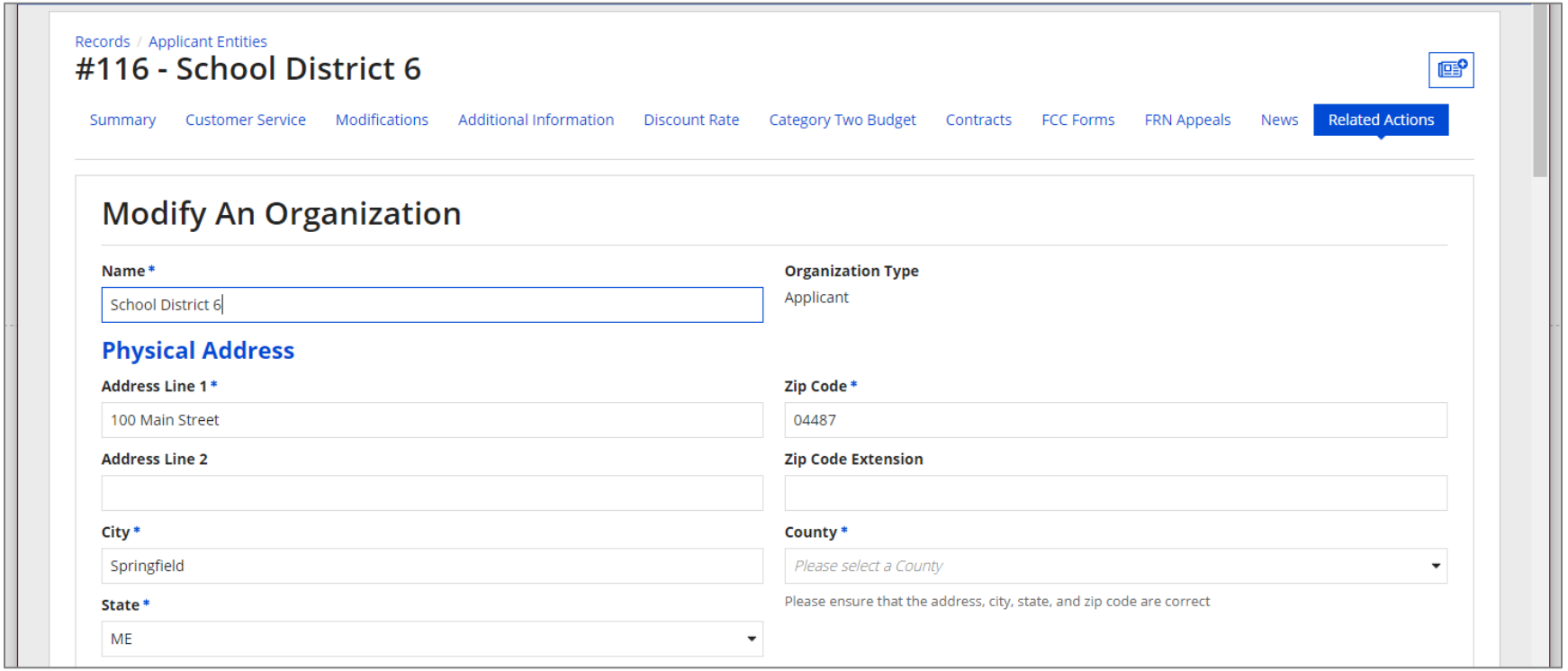
Districts: C2 Data By Aggregate

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

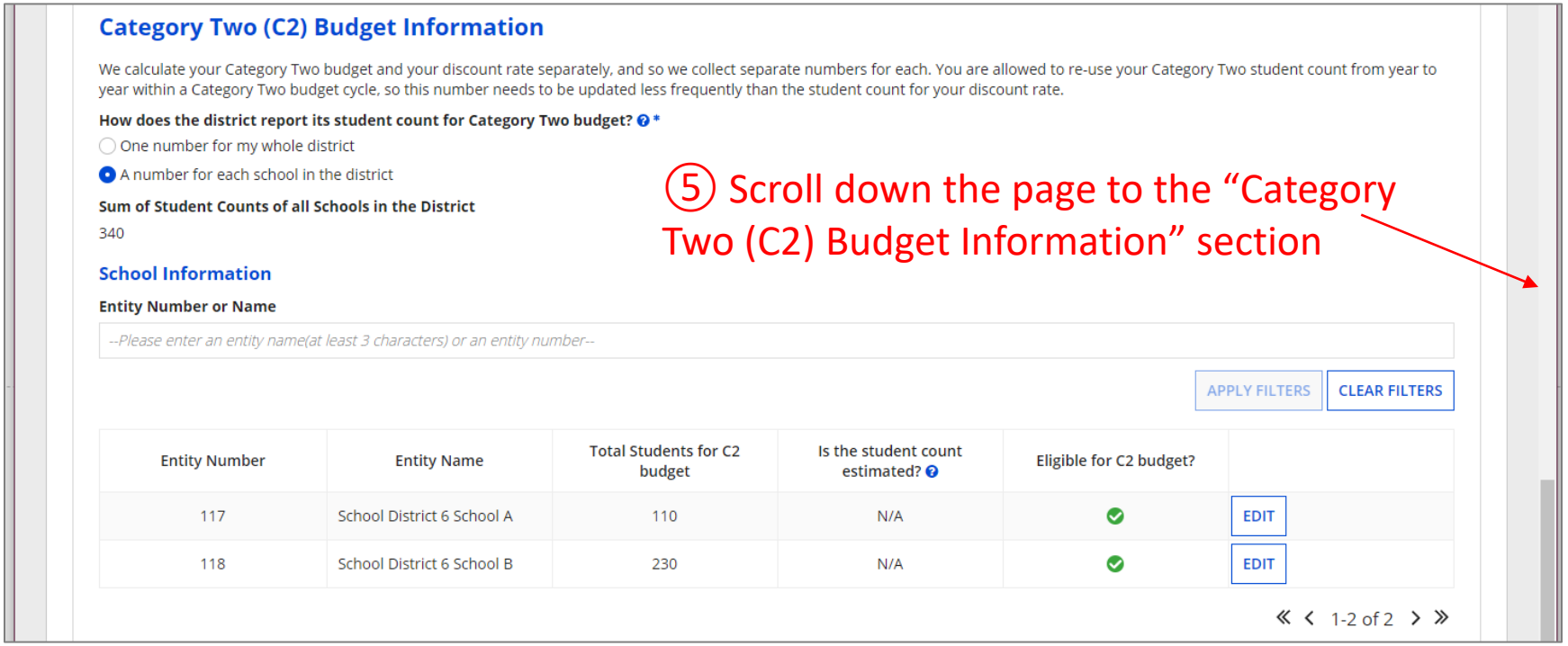


Districts: C2 Data By Aggregate

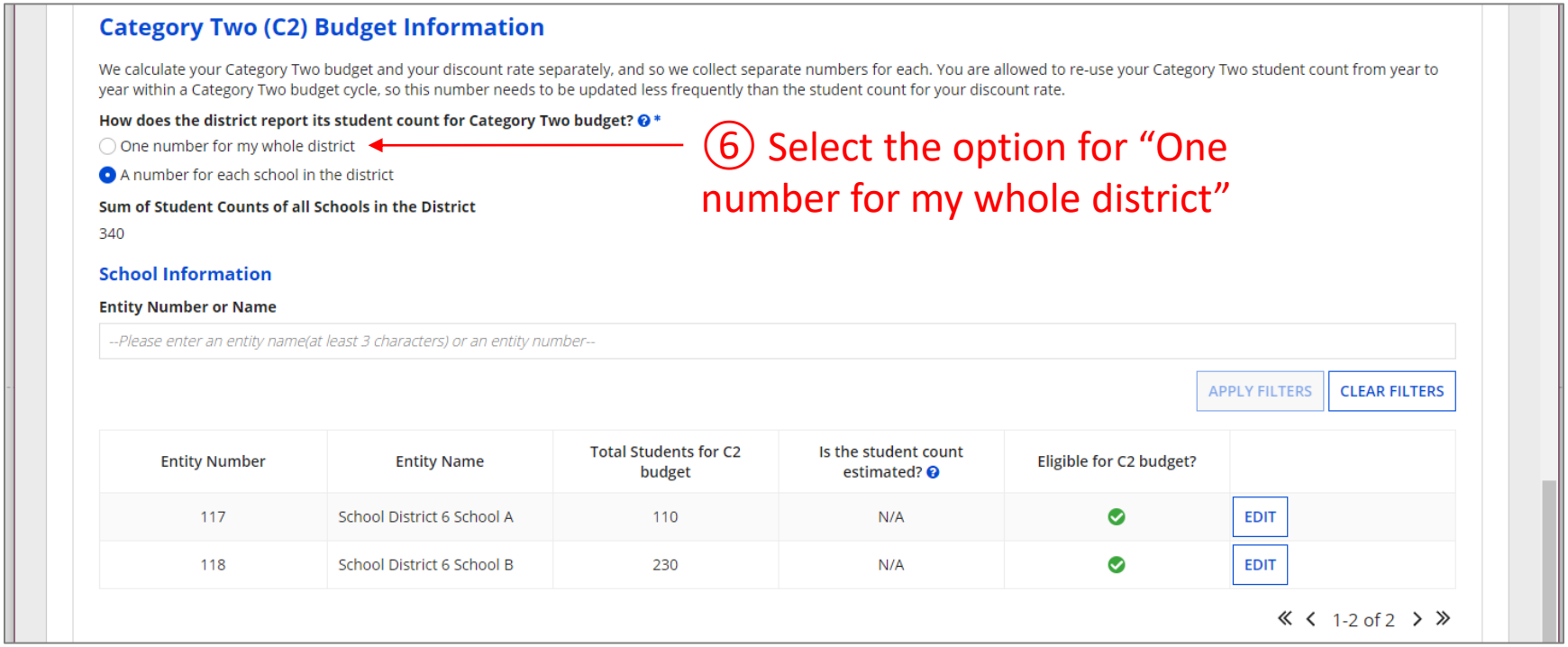
An editable version of the summary page for your school district will display



Districts: C2 Data By Aggregate

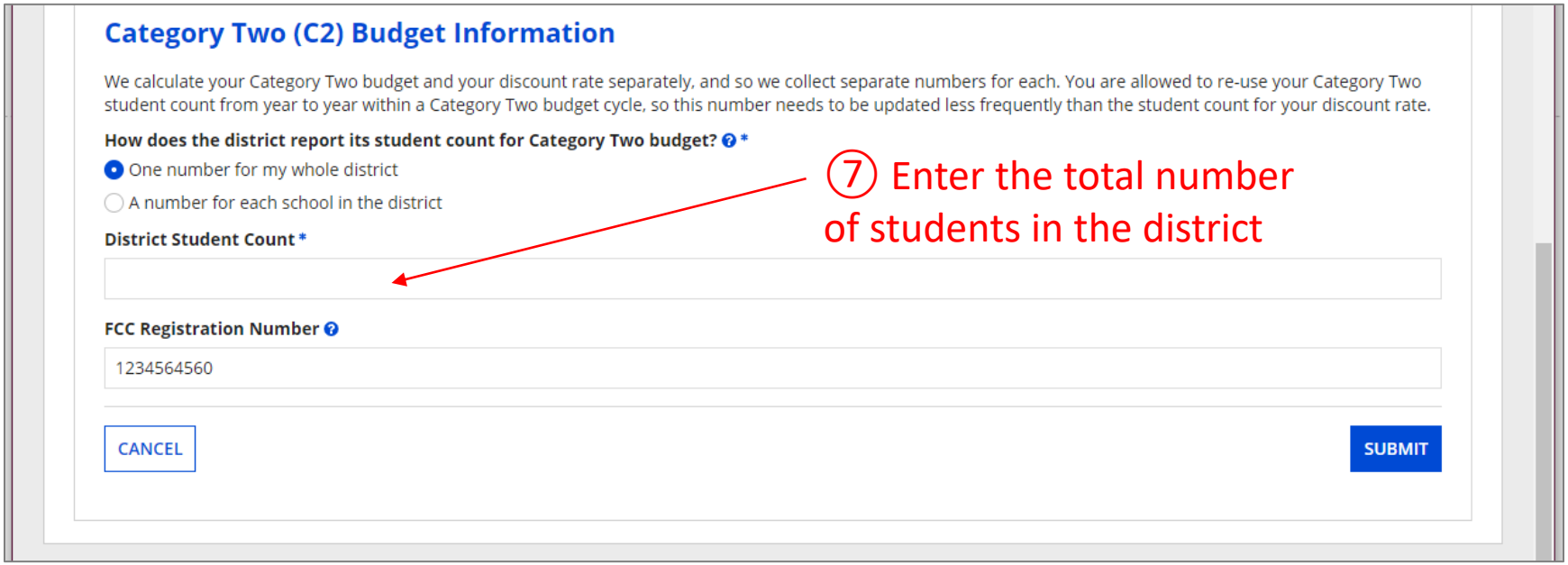


Districts: C2 Data By Aggregate

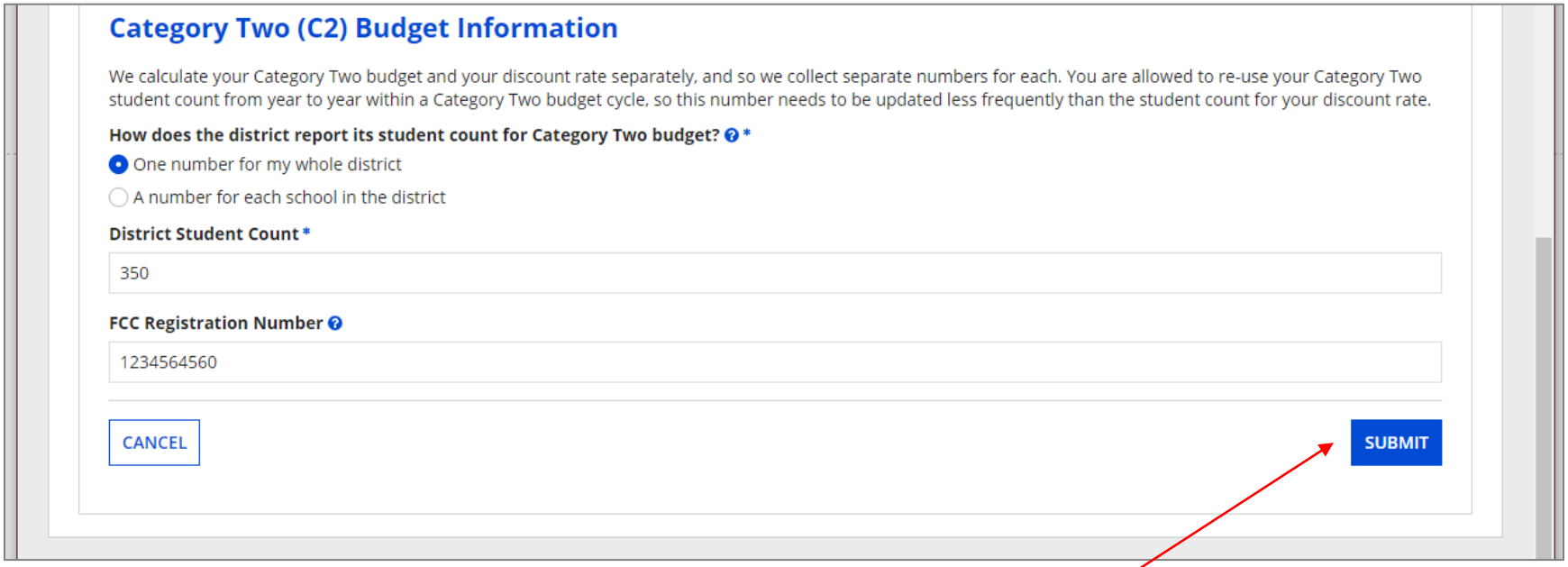


Note: *For a district with 10 or fewer schools, EPC can calculate a higher C2 budget by utilizing the funding floor if any of your schools has 149 or fewer students. If you opt to report your student count as one district-wide aggregate number, EPC will not allow you to do this.*

Districts: C2 Data By Aggregate



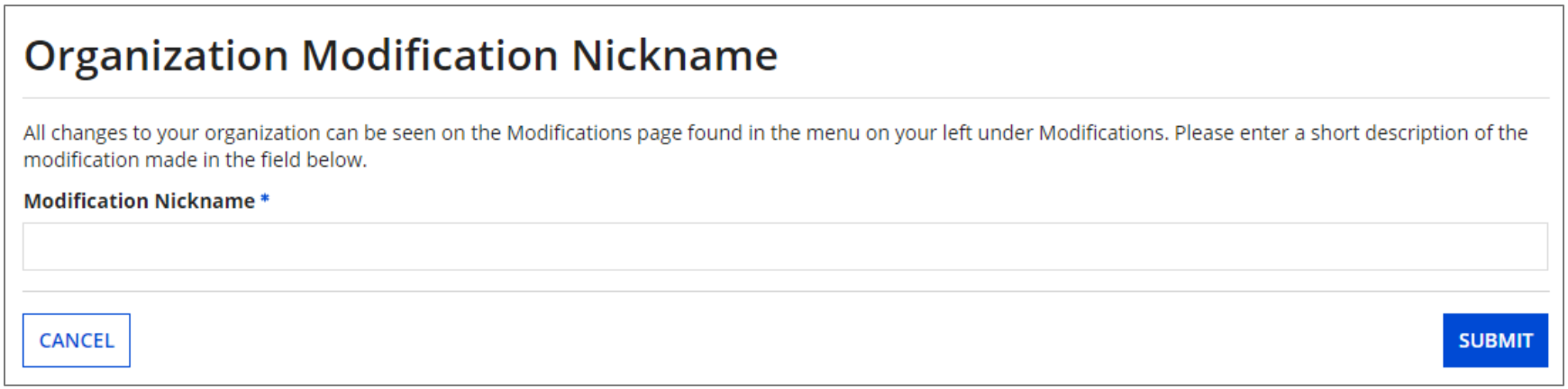
Districts: C2 Data By Aggregate



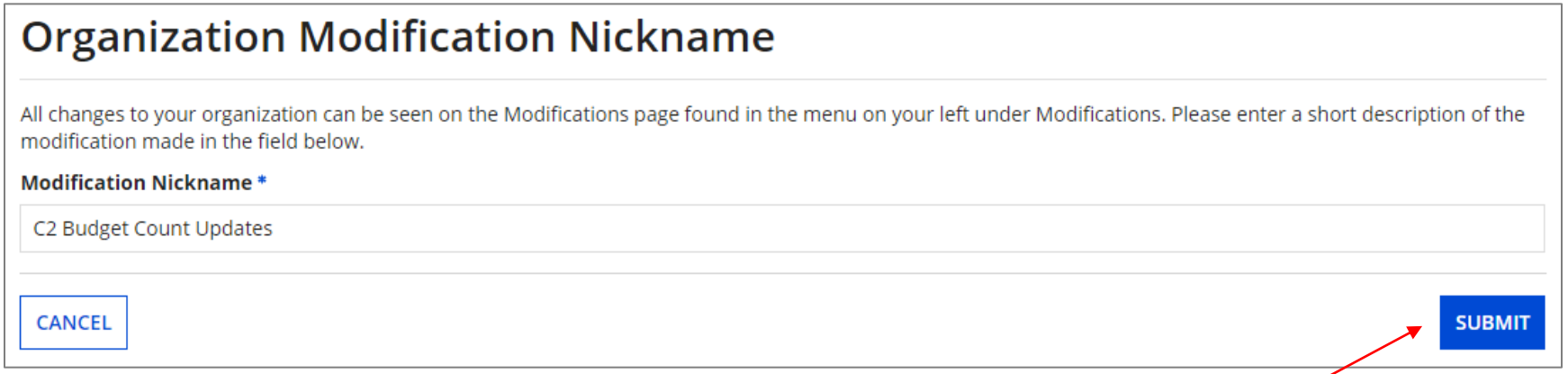
⑧ Click on the “Submit” button

Districts: C2 Data By Aggregate

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



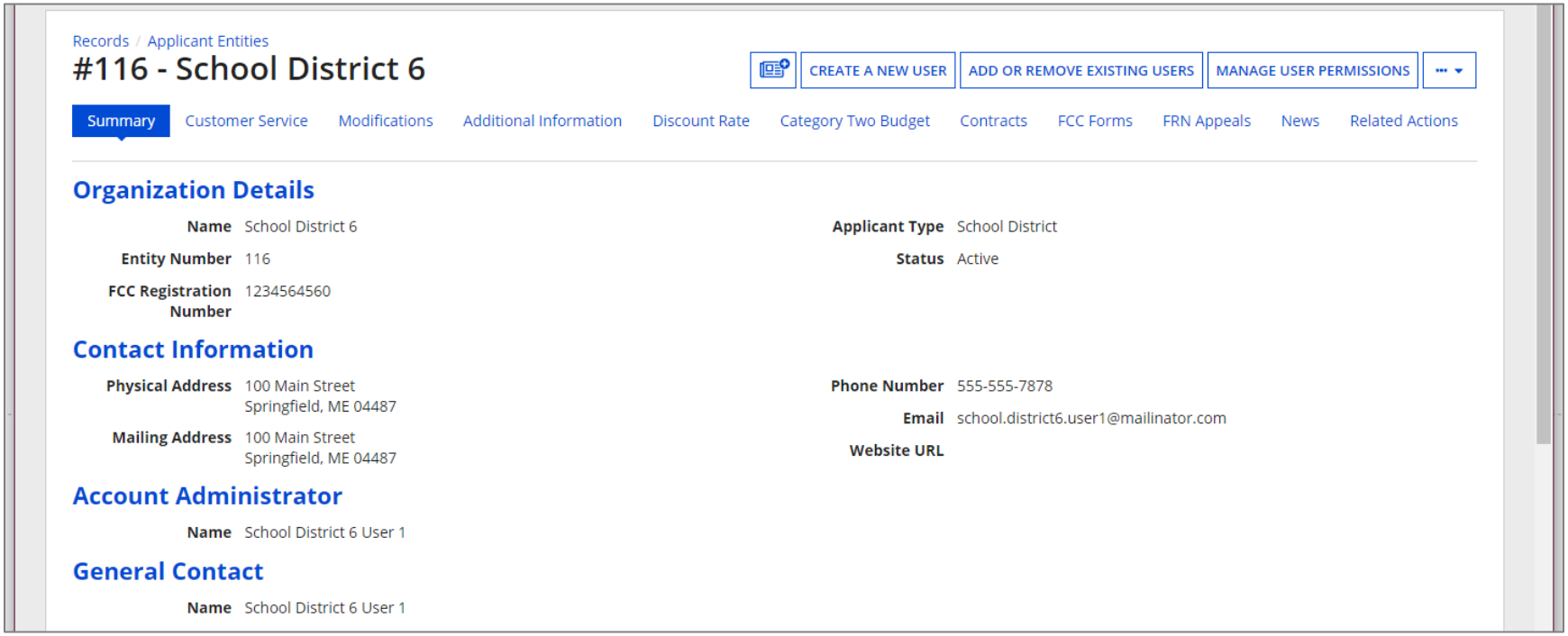
Districts: C2 Data By Aggregate



⑩ Then click on the “SUBMIT” button

Districts: C2 Data By Aggregate

The summary page for your school district will display



Districts: C2 Data By Aggregate

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:

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

School Districts:
Requesting a Replacement C2 Budget

→I 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 specifically request 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

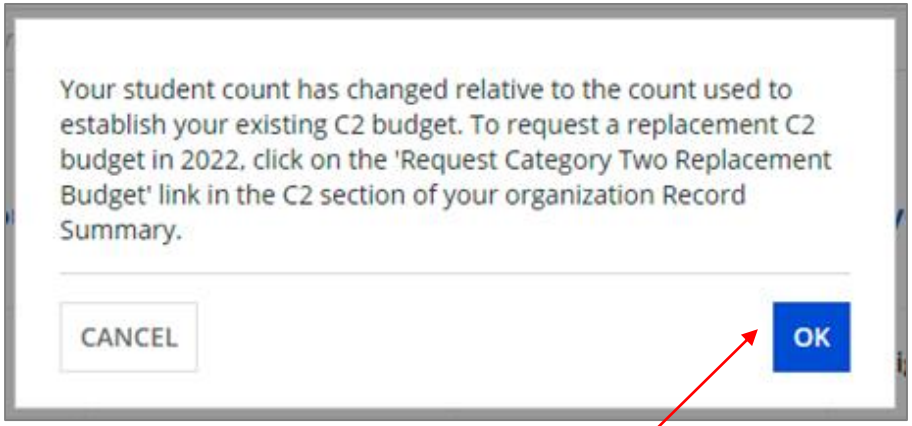
Note: *Only full-rights users can request replacement budgets. Partial-rights users can update organization details, but only users with full rights permissions will be able to update the C2 budget.*

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.

Districts: Replacement C2 Budget

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.



② Click on the “OK” button

Districts: Replacement C2 Budget

③ Go to the school district's summary page

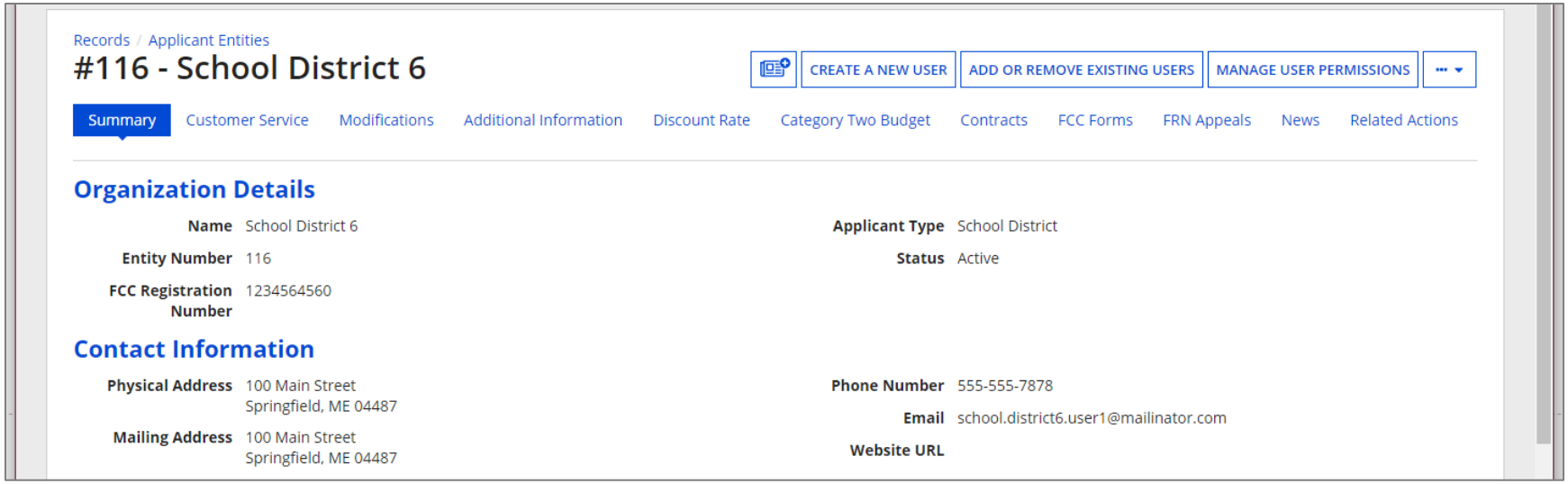
(you may already be on this page depending on your last action)

How to get there:

1) Click on the "News" link in the menu at the top of the page

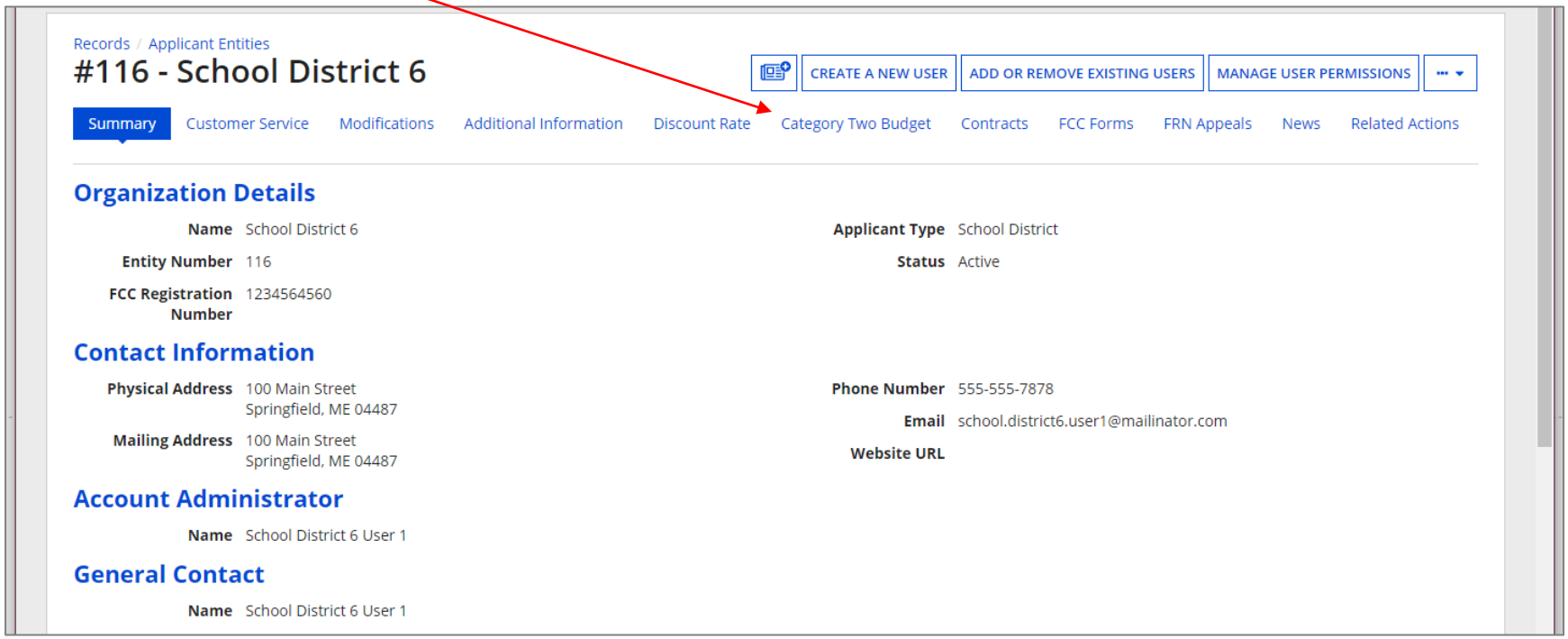
2) Click on the USAC logo to go to your Landing Page

3) Click on the link for the school district's name

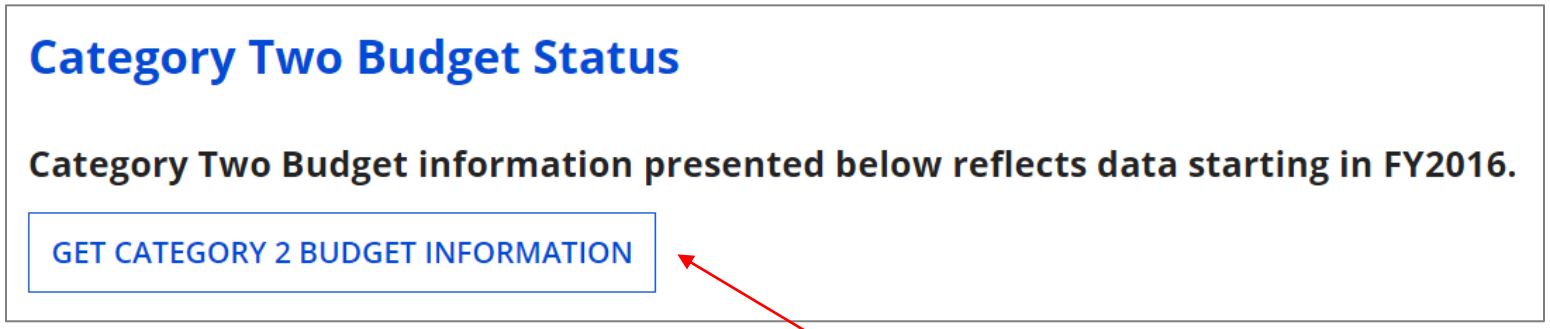


Districts: Replacement C2 Budget

④ Click on the “Category Two Budget” link



Districts: Replacement C2 Budget



⑤ Click on the “GET CATEGORY 2 BUDGET INFORMATION” button

Districts: Replacement C2 Budget

Category Two Budget Status

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

2021 - 2025

2021 - 2022 (Budgeted Entity)

Show column definitions

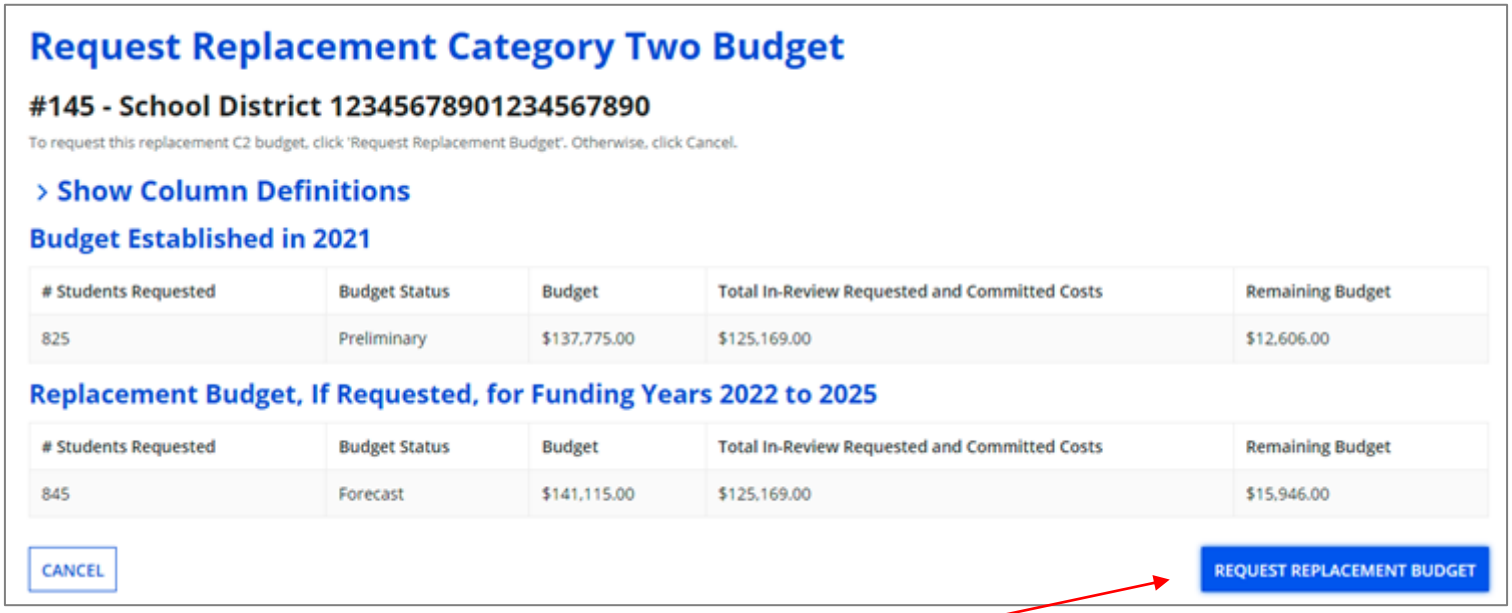
Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Preliminary	$142,618.00	$25,150.86	$0.00	$25,150.86	$117,467.14	View Details

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 Request Replacement C2 Budget.

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

Districts: Replacement C2 Budget

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



Request Replacement Category Two Budget

#145 - School District 12345678901234567890

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
825	Preliminary	$137,775.00	$125,169.00	$12,606.00

Replacement Budget, If Requested, for Funding Years 2022 to 2025

# Students Requested	Budget Status	Budget	Total In-Review Requested and Committed Costs	Remaining Budget
845	Forecast	$141,115.00	$125,169.00	$15,946.00

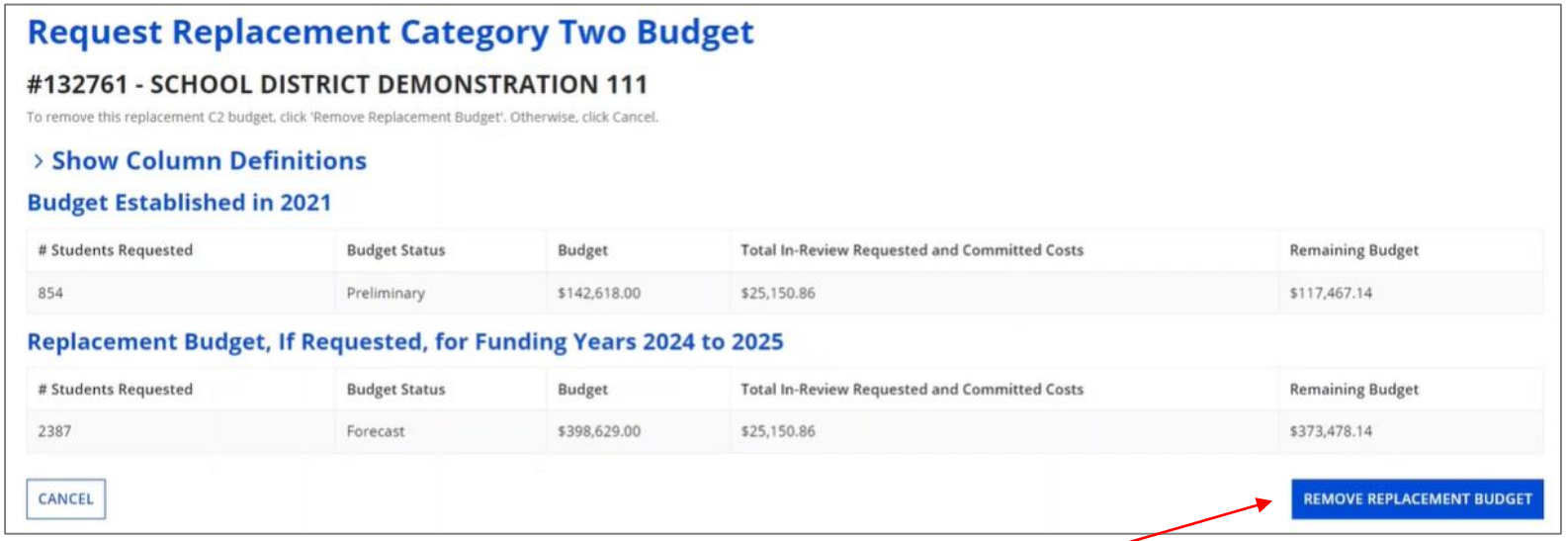
CANCEL

REQUEST REPLACEMENT BUDGET

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



Request Replacement Category Two Budget

#132761 - SCHOOL DISTRICT DEMONSTRATION 111

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
854	Preliminary	$142,618.00	$25,150.86	$117,467.14

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

# Students Requested	Budget Status	Budget	Total In-Review Requested and Committed Costs	Remaining Budget
2387	Forecast	$398,629.00	$25,150.86	$373,478.14

CANCEL

REMOVE REPLACEMENT BUDGET

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?

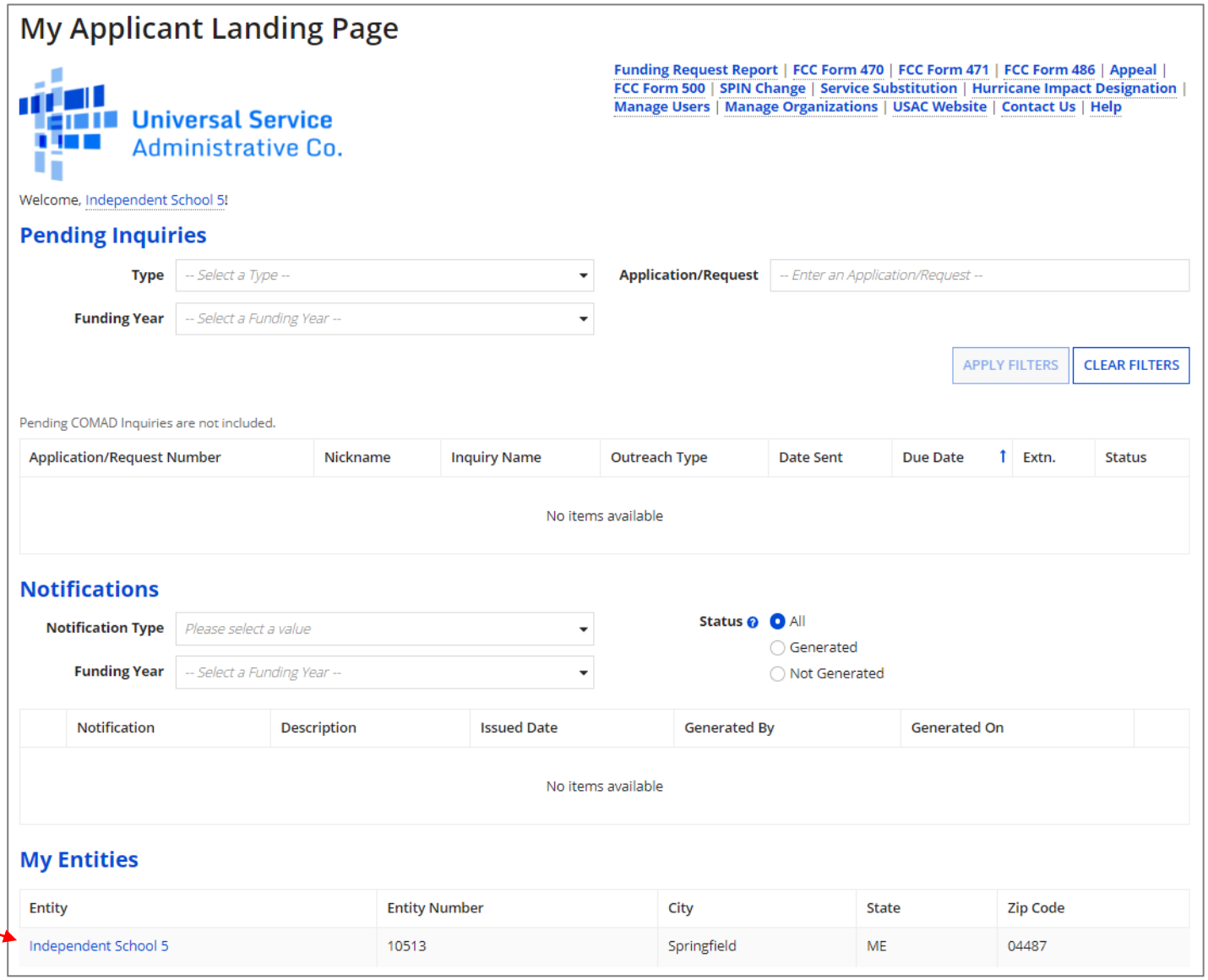
Independent schools report student counts for two purposes:

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 |←
   →| OPTIONAL SUBSEQUENT YEARS |←
   - 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

⇥I REQUIRED ANNUALLY I⇤

Independent Schools: NSLP Data

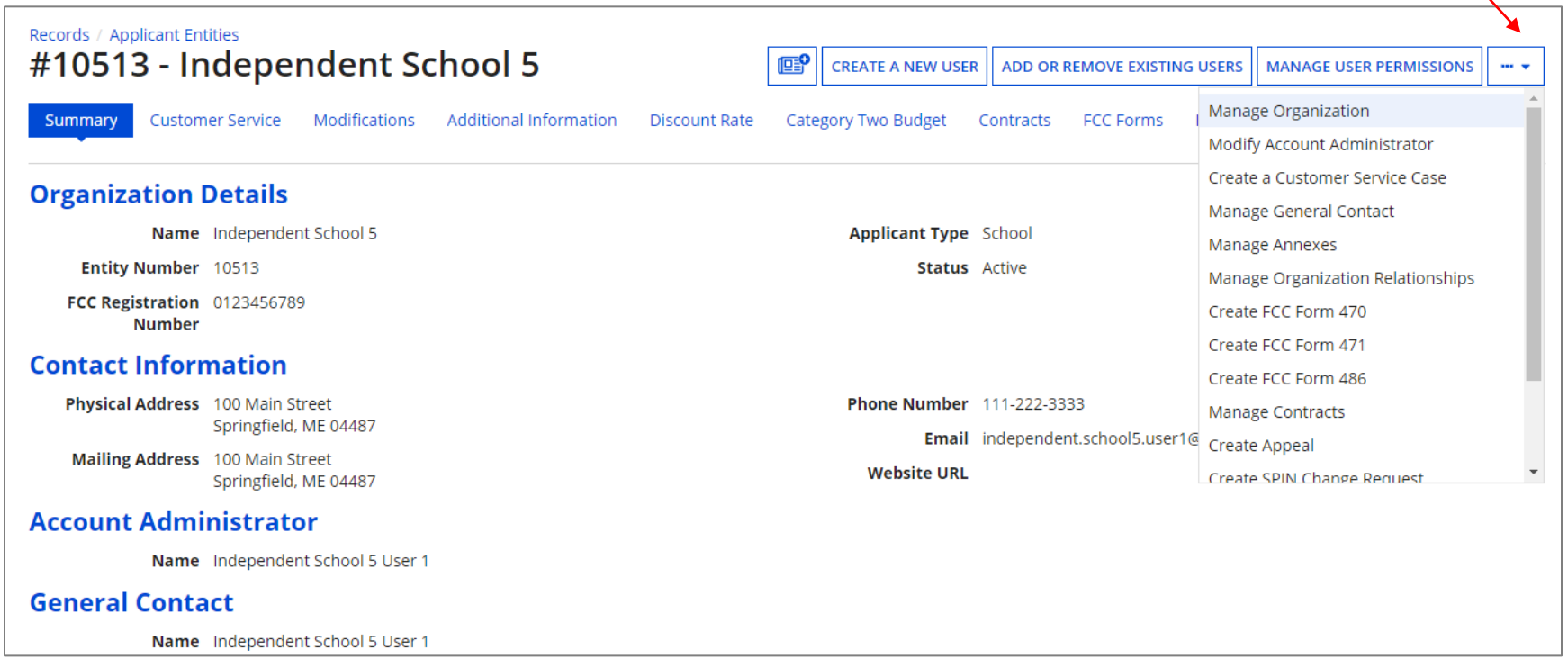


① On the Landing Page, scroll to the "My Entities" section and click on the link for your school

Independent Schools: NSLP Data

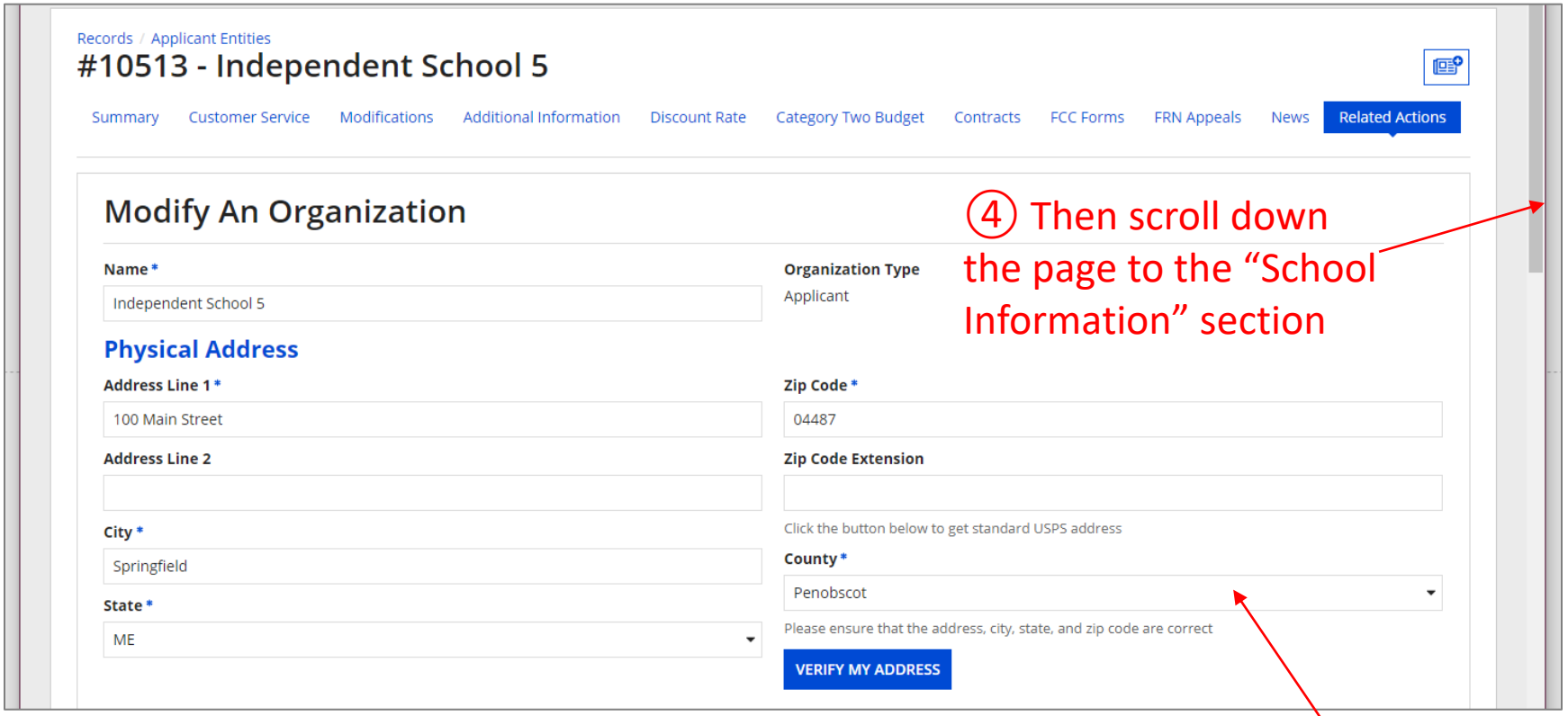
The summary page for your school will display

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

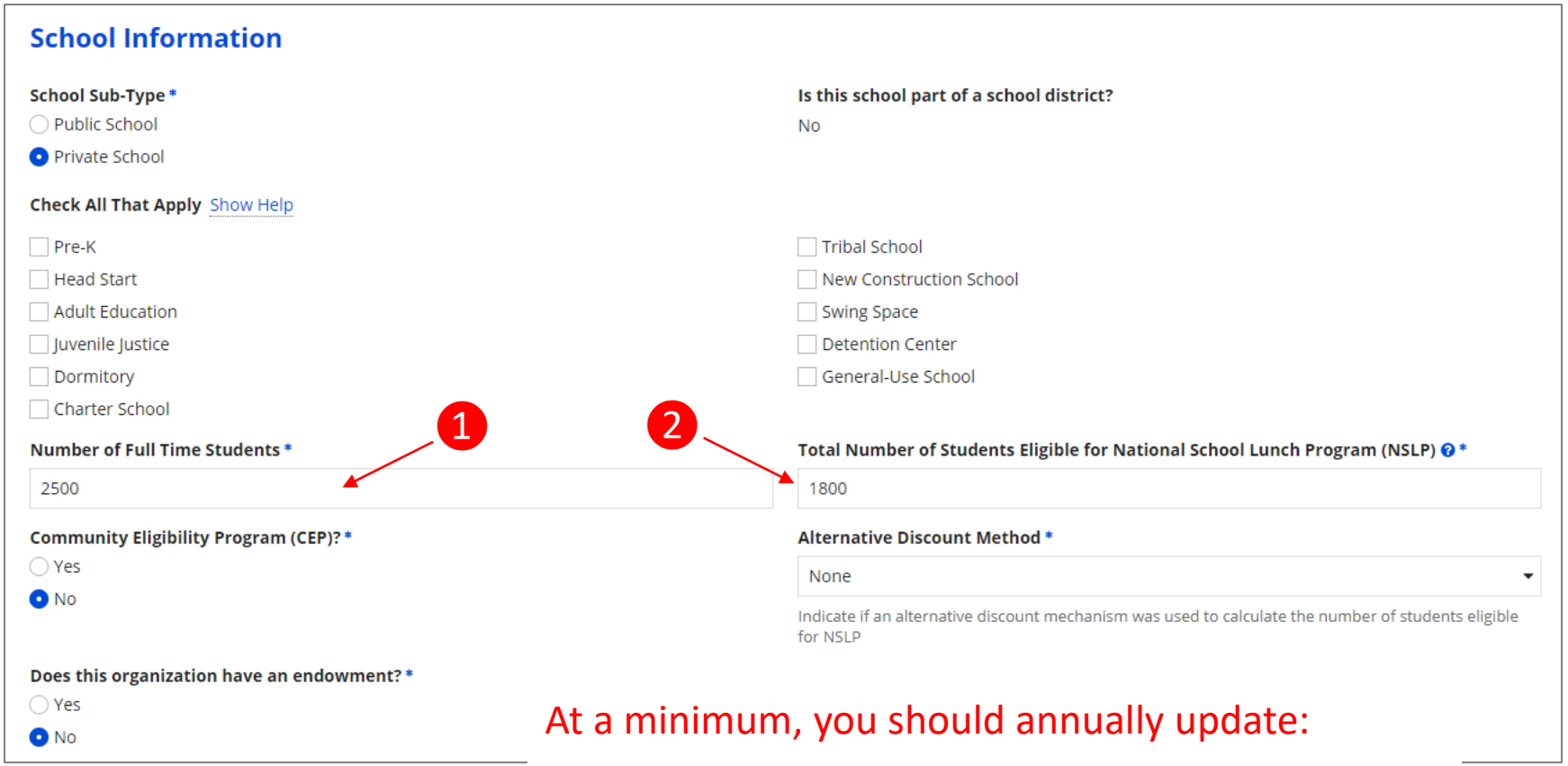


Independent Schools: NSLP Data

An editable version of the summary page will display



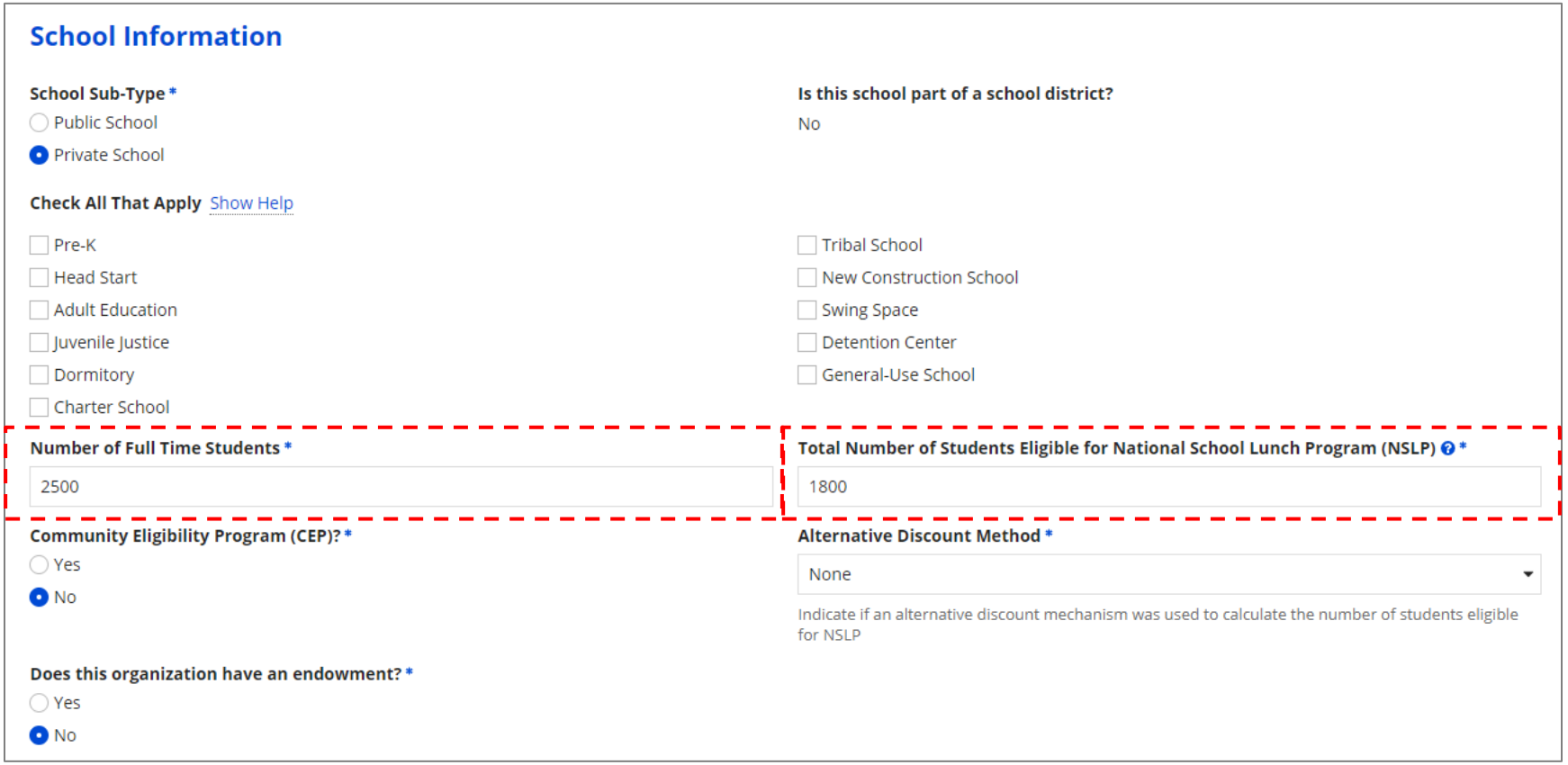
Independent Schools: NSLP Data



At a minimum, you should annually update:

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

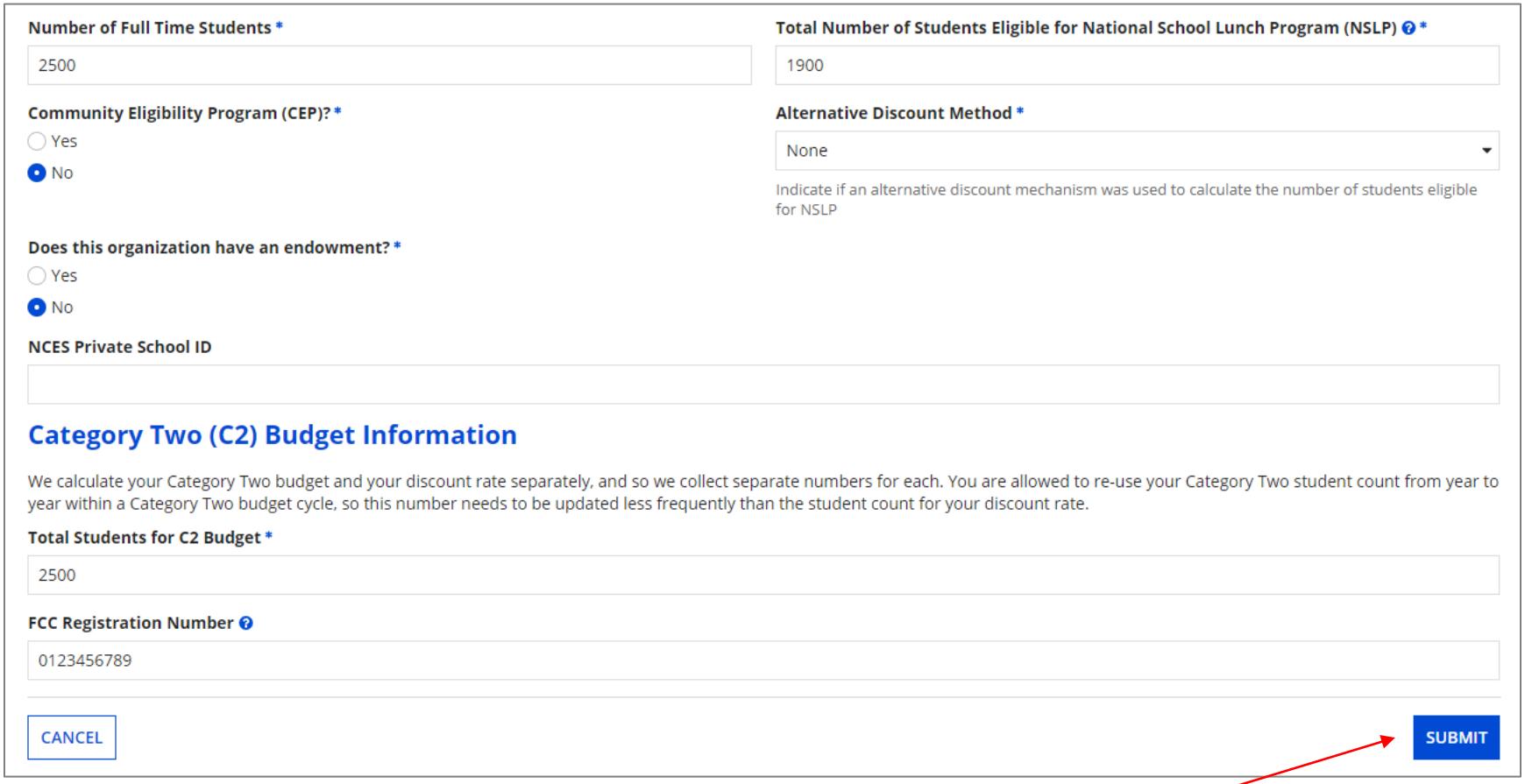
Independent Schools: NSLP Data



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.

Independent Schools: NSLP Data

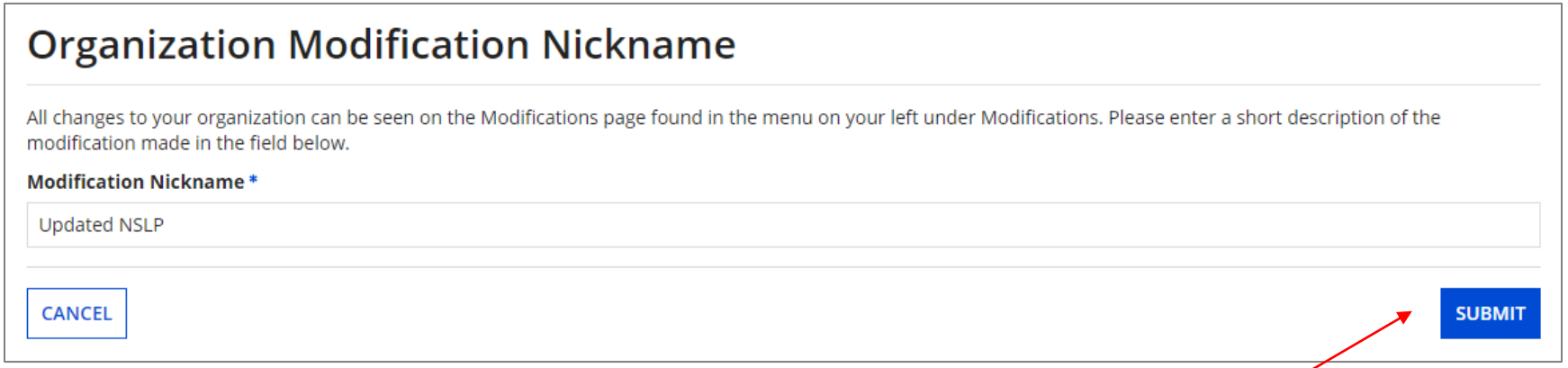


⑥ Click on the “SUBMIT” button to save the changes

Independent Schools: NSLP Data

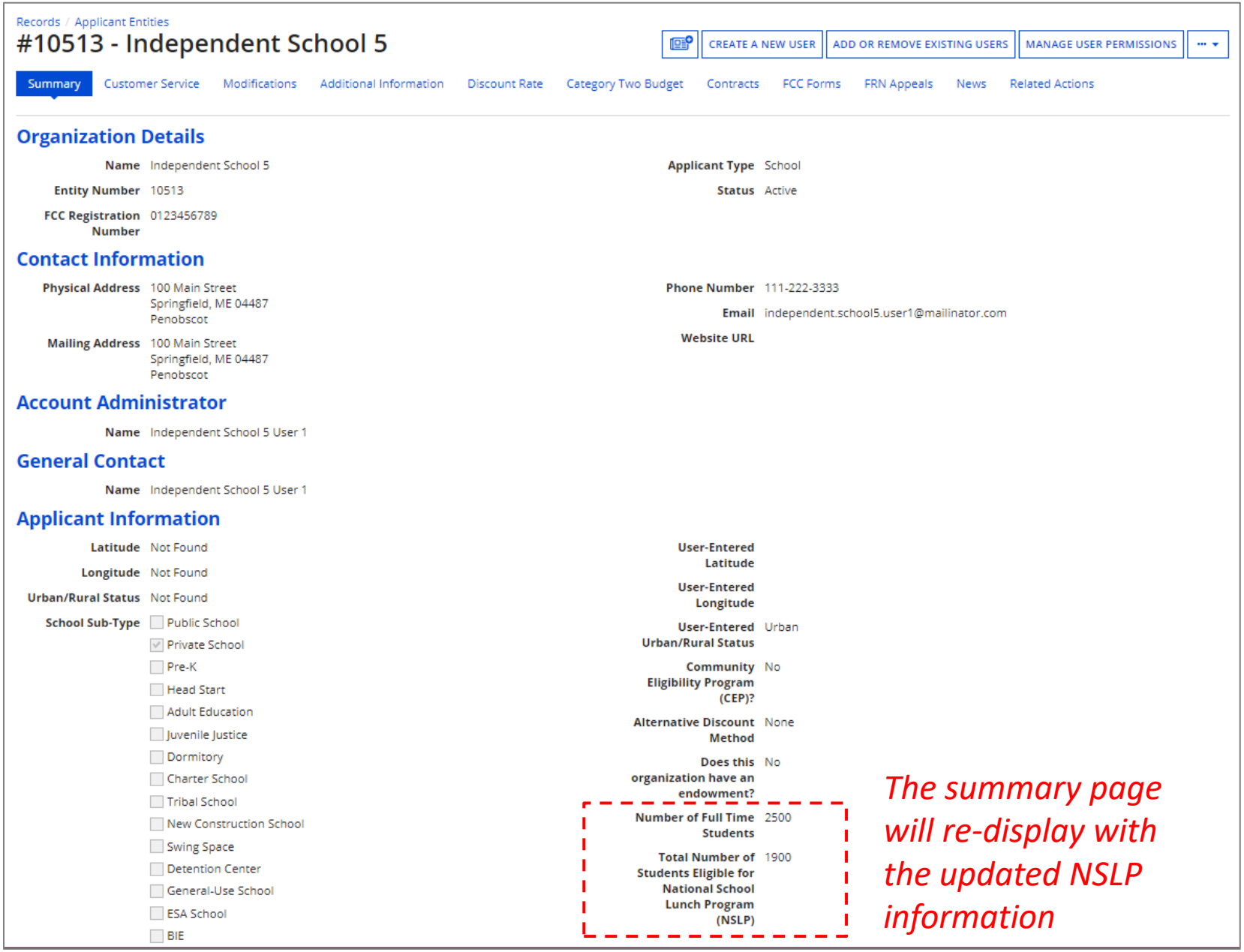
⑦ Enter a Modification Nickname to remind yourself what changes were made

Independent Schools: NSLP Data



⑧ Click on the “SUBMIT” button

Independent Schools: NSLP Data



Records / Applicant Entities

#10513 - Independent School 5

CREATE A NEW USER | ADD OR REMOVE EXISTING USERS | MANAGE USER PERMISSIONS | ...

Summary | Customer Service | Modifications | Additional Information | Discount Rate | Category Two Budget | Contracts | FCC Forms | FRN Appeals | News | Related Actions

Organization Details

Name Independent School 5
Entity Number 10513
FCC Registration Number 0123456789
Applicant Type School
Status Active

Contact Information

Physical Address 100 Main Street
Springfield, ME 04487
Penobscot
Mailing Address 100 Main Street
Springfield, ME 04487
Penobscot
Phone Number 111-222-3333
Email independent.school5.user1@mailinator.com
Website URL

Account Administrator

Name Independent School 5 User 1

General Contact

Name Independent School 5 User 1

Applicant Information

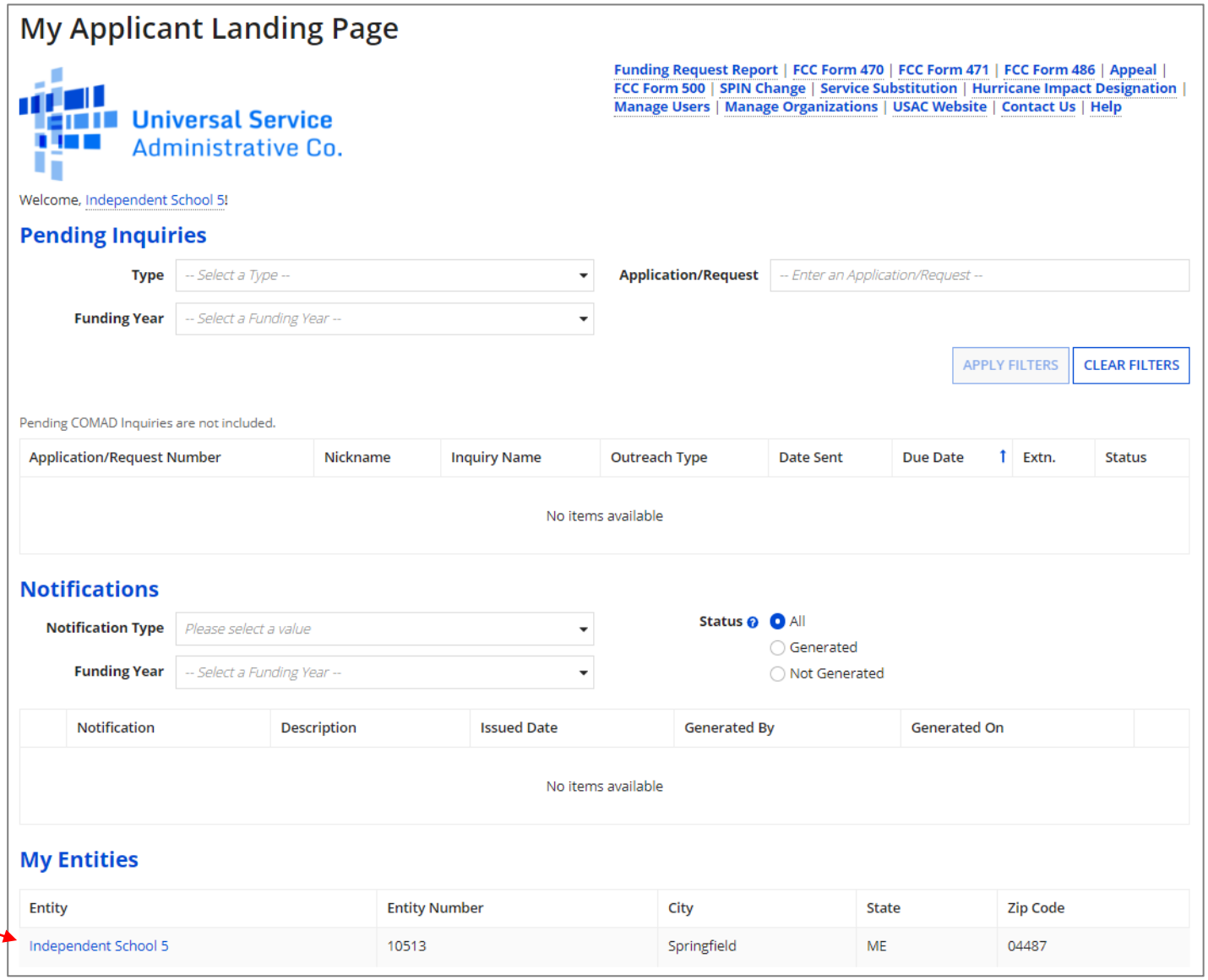
Latitude Not Found
Longitude Not Found
Urban/Rural Status Not Found
School Sub-Type
- [ ] Public School
- [x] Private School
- [ ] Pre-K
- [ ] Head Start
- [ ] Adult Education
- [ ] Juvenile Justice
- [ ] Dormitory
- [ ] Charter School
- [ ] Tribal School
- [ ] New Construction School
- [ ] Swing Space
- [ ] Detention Center
- [ ] General-Use School
- [ ] ESA School
- [ ] BIE

User-Entered Latitude
User-Entered Longitude
User-Entered Urban/Rural Status Urban
Community Eligibility Program (CEP)? No
Alternative Discount Method None
Does this organization have an endowment? No
Number of Full Time Students 2500
Total Number of Students Eligible for National School Lunch Program (NSLP) 1900

The summary page will re-display with the updated NSLP information

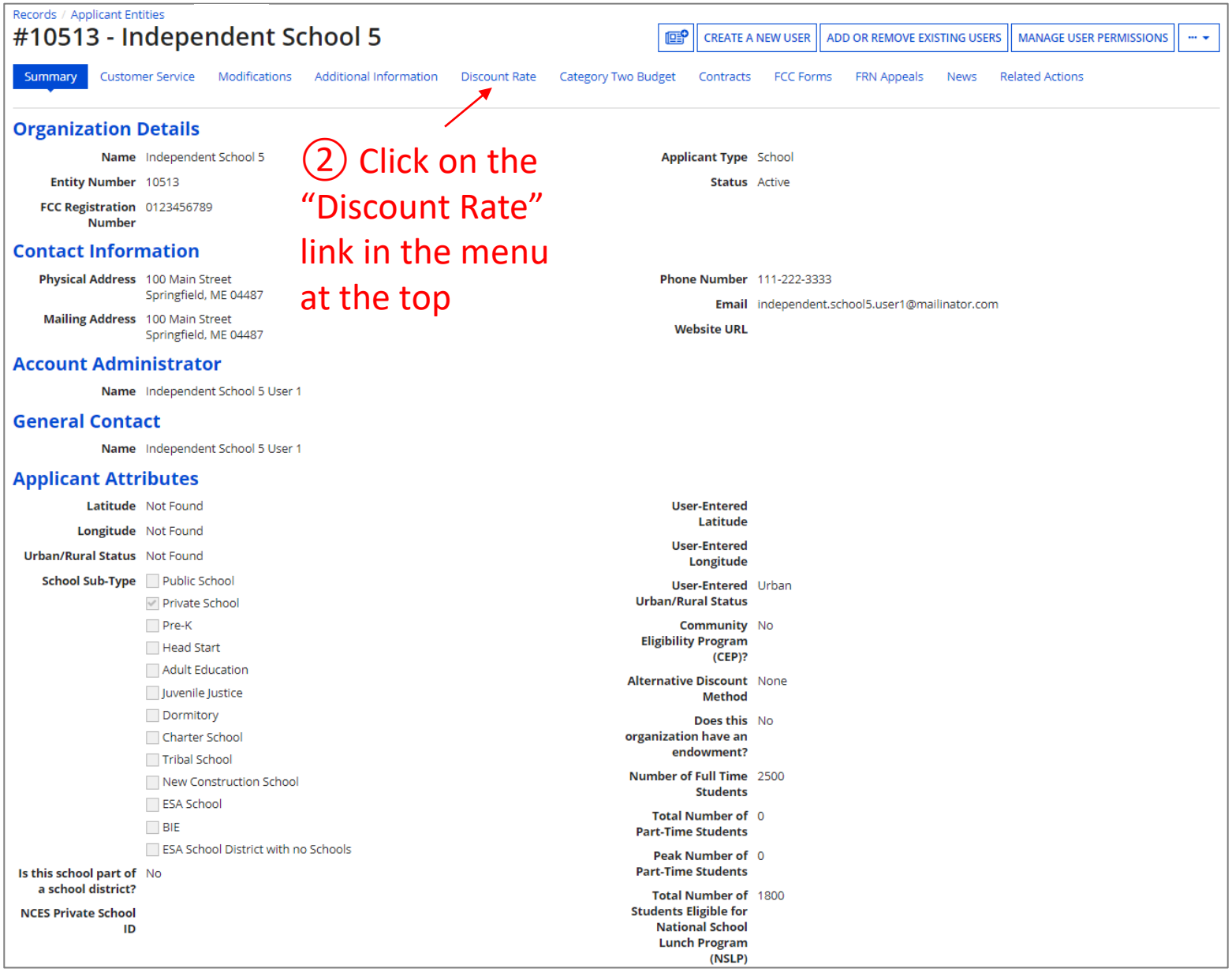
Independent Schools:
Checking for Discount Rate Errors

Independent Schools: Discount Errors



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

Independent Schools: Discount Errors

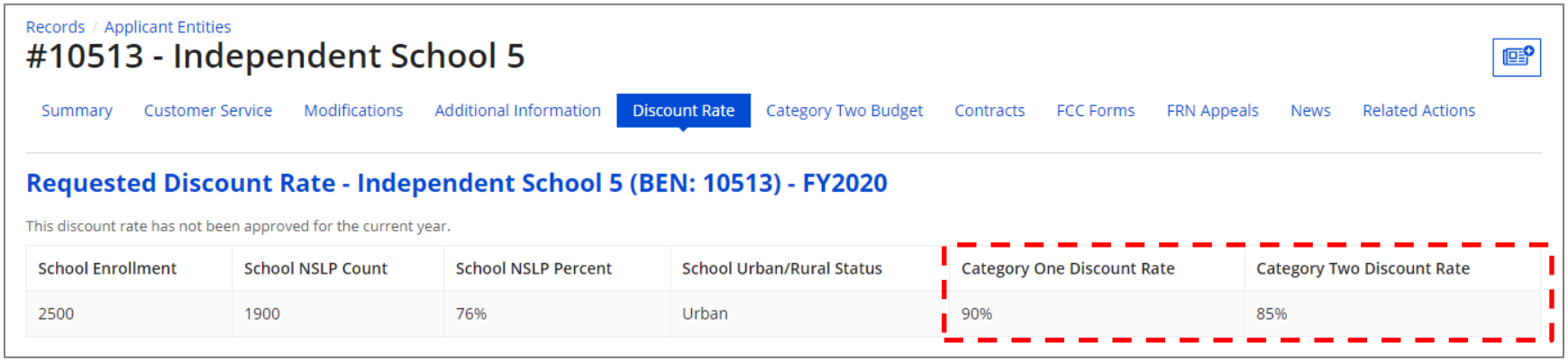


Independent Schools: Discount Errors

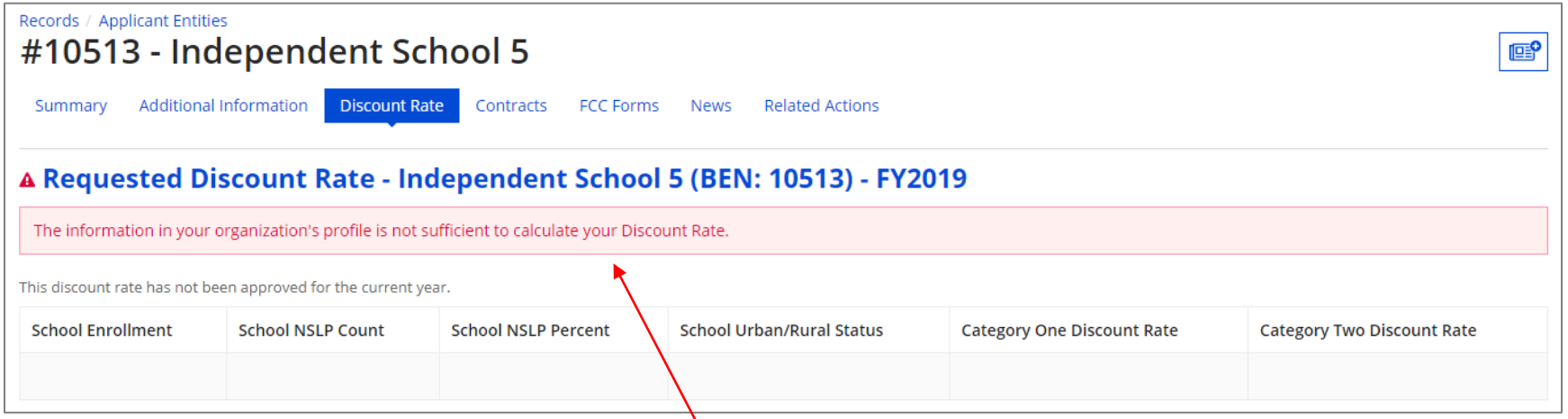
The discount rate for the independent school displays

NOTE:

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



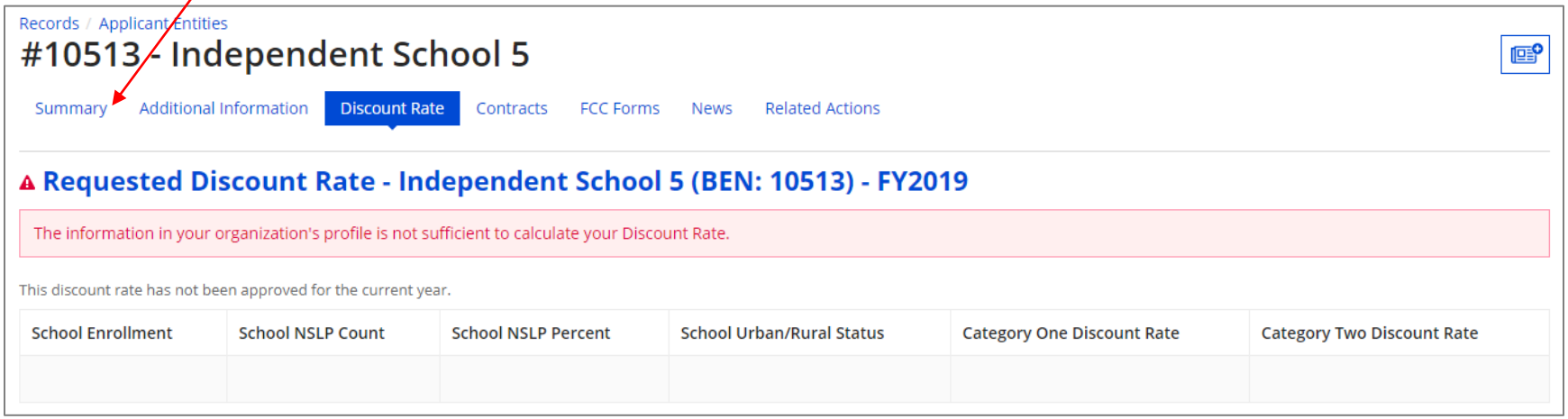
Independent Schools: Discount Errors



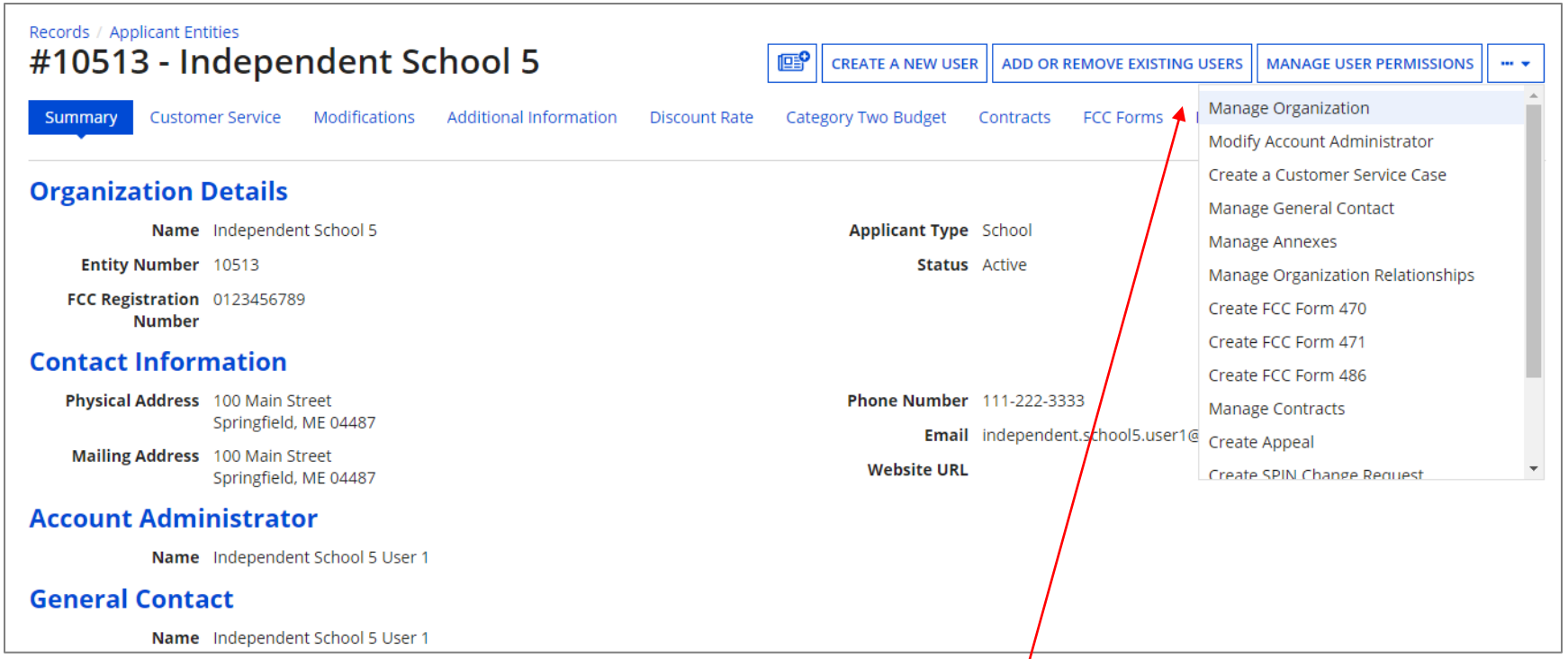
If you see an error message instead of the discount, there is an issue with the profile information for your school

Independent Schools: Discount Errors

③ Click on the “Summary” link



Independent Schools: Discount Errors

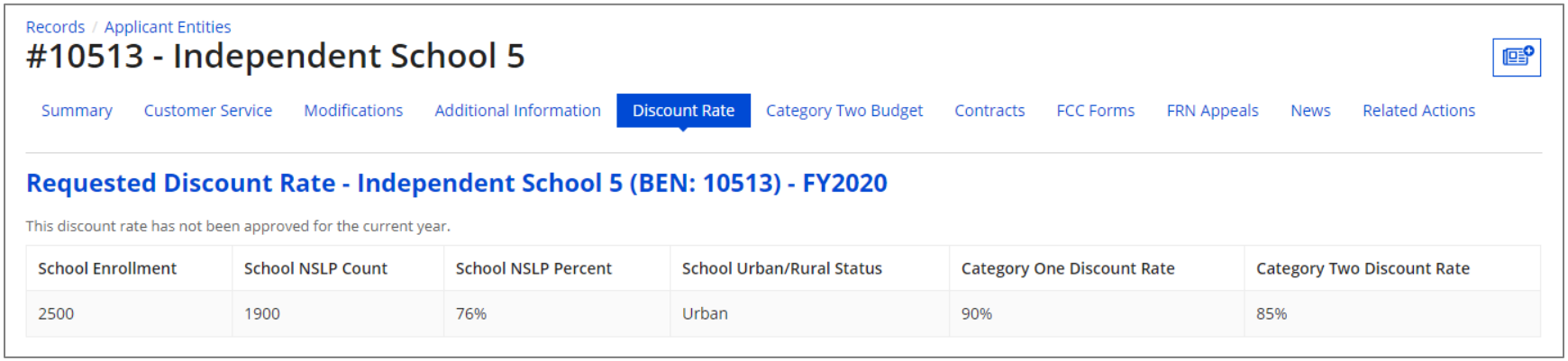


④ Click on the "…" button and choose the "MANAGE ORGANIZATION" option

⑤ Fix any issues causing the discount not to calculate

Independent Schools: Discount Errors

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 |←

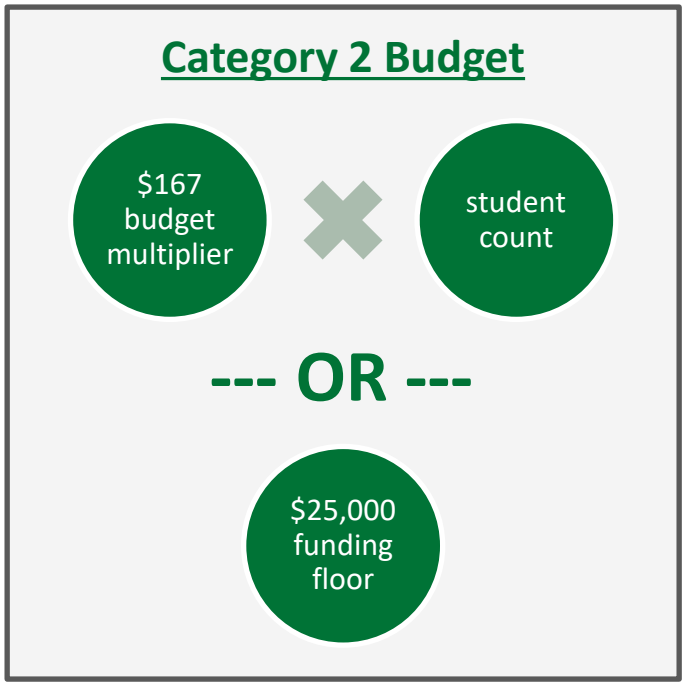
Note:

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?

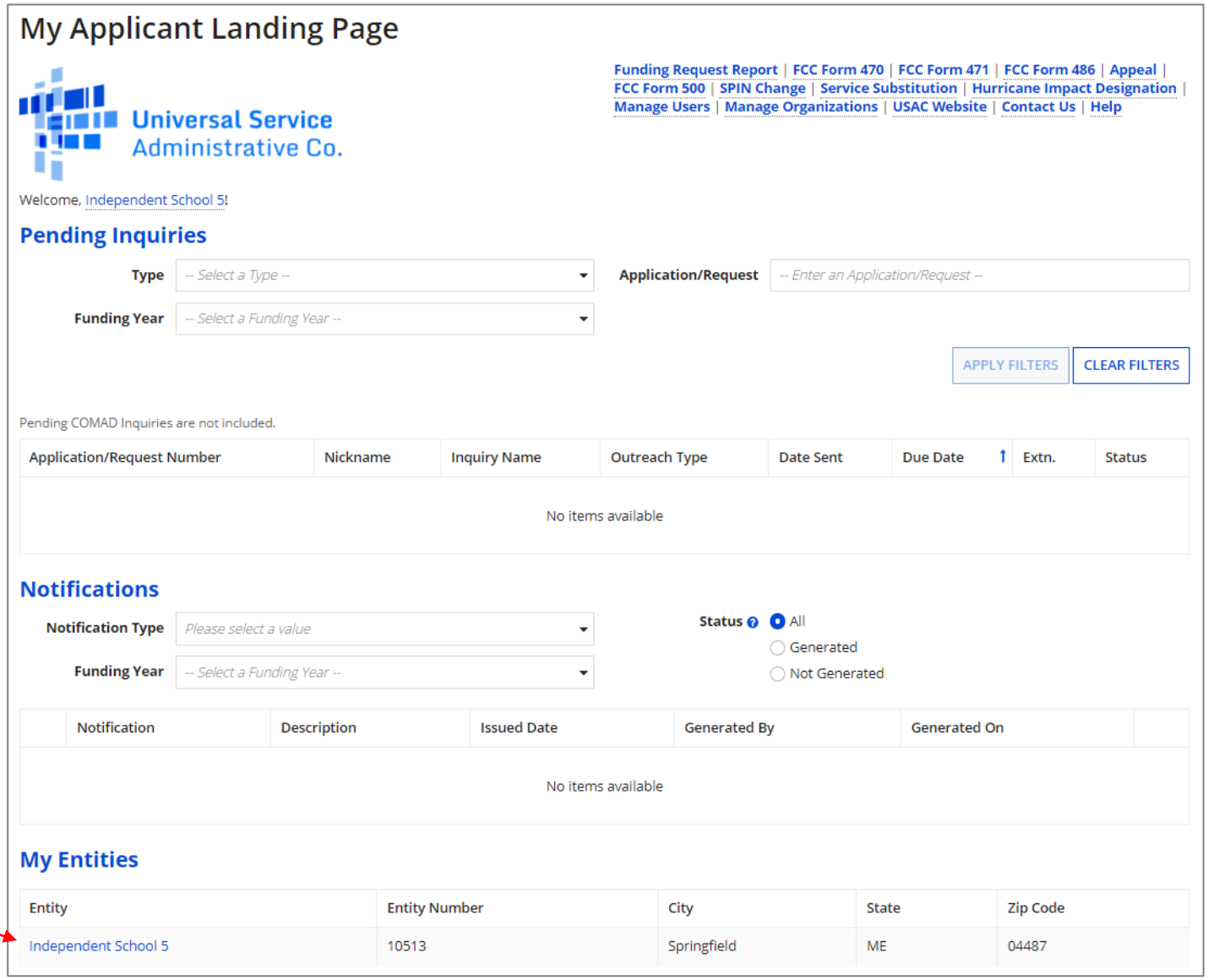
The C2 budget for independent schools is based on the total number of students

independent schools >>>



the C2 budget is the greater of these two calculations

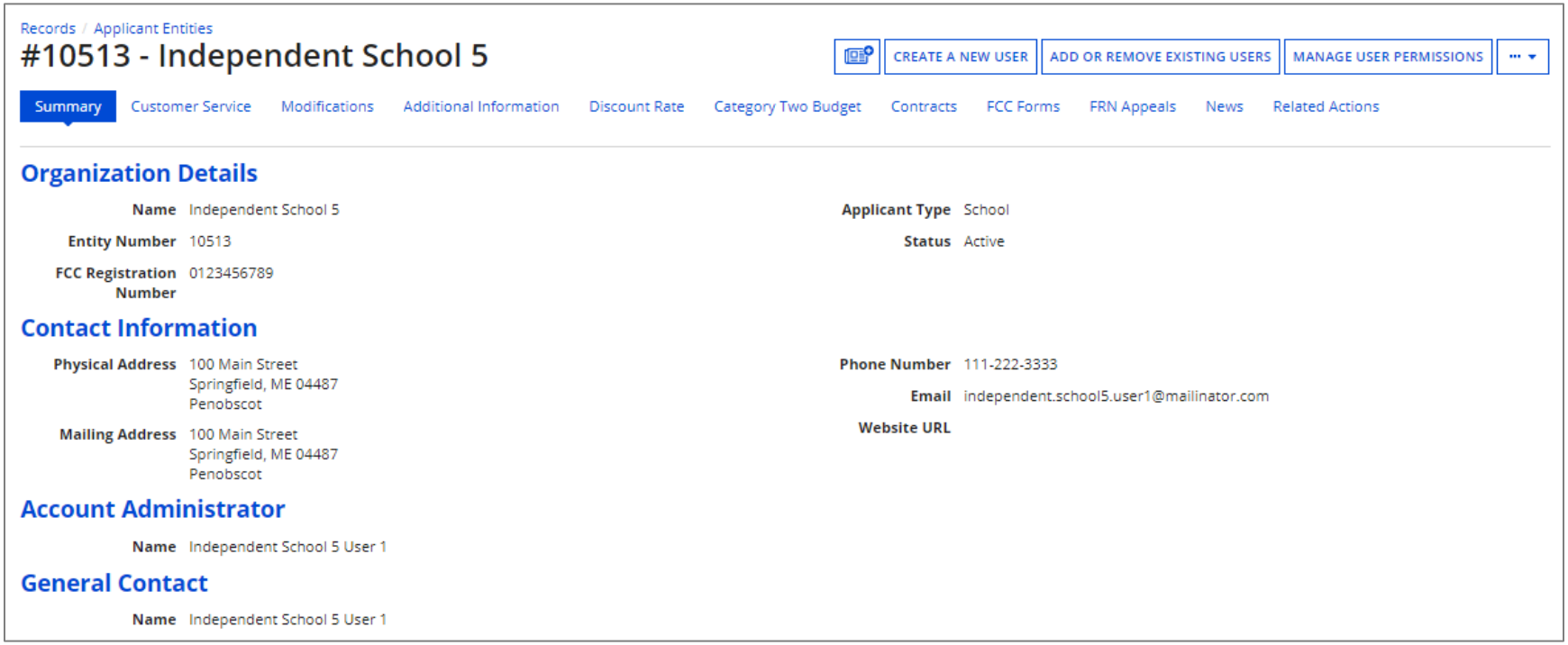
Independent Schools: C2 Data



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

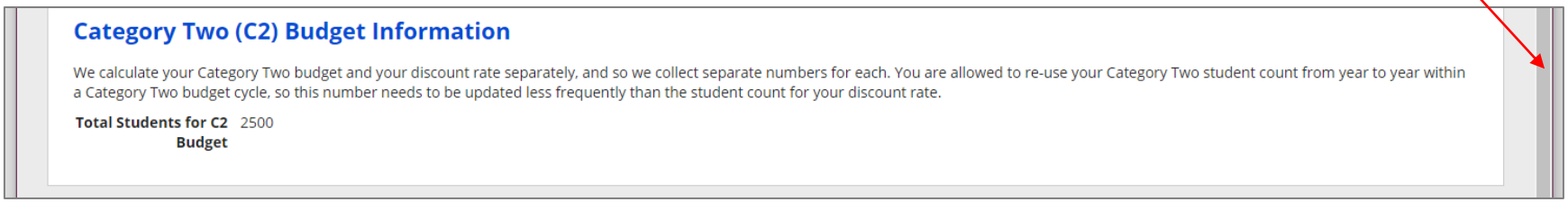
Independent Schools: C2 Data

The summary page for your school will display



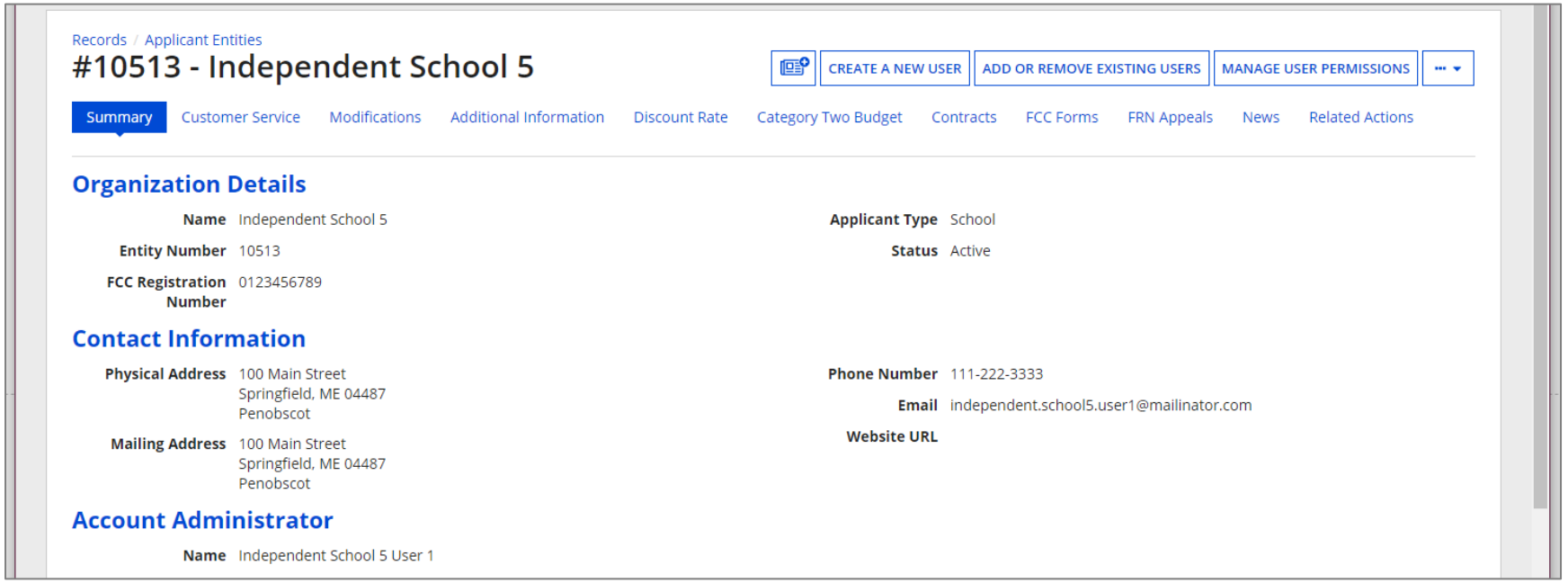
Independent Schools: C2 Data

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



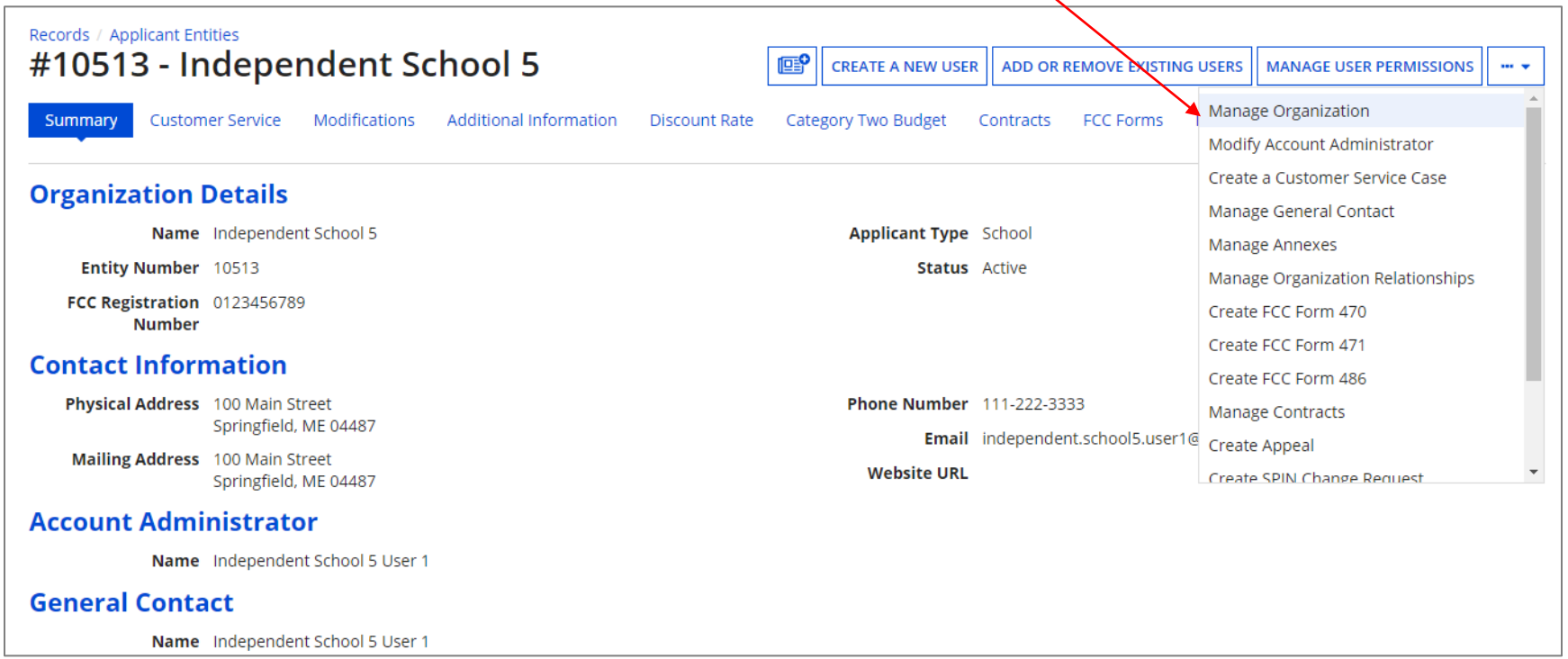
Independent Schools: C2 Data

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



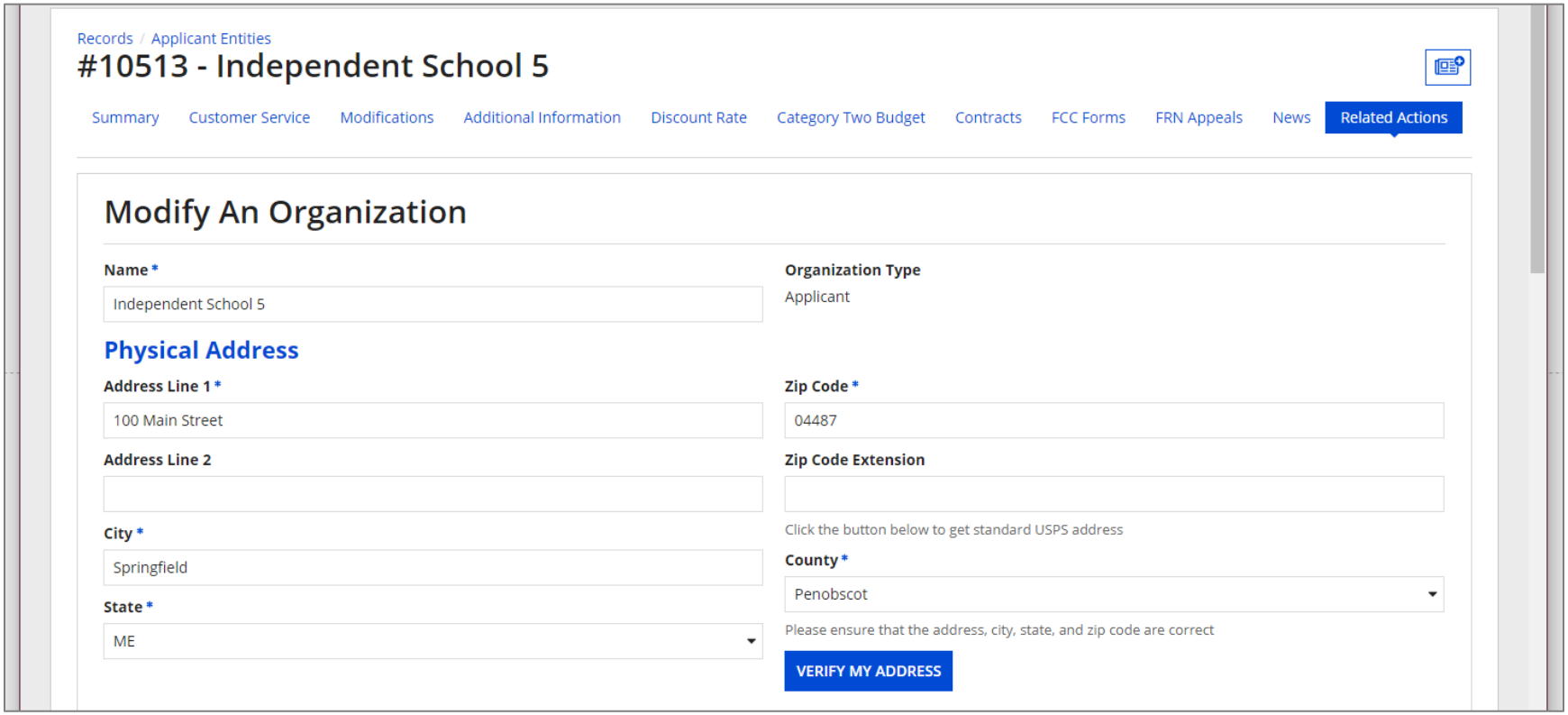
Independent Schools: C2 Data

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



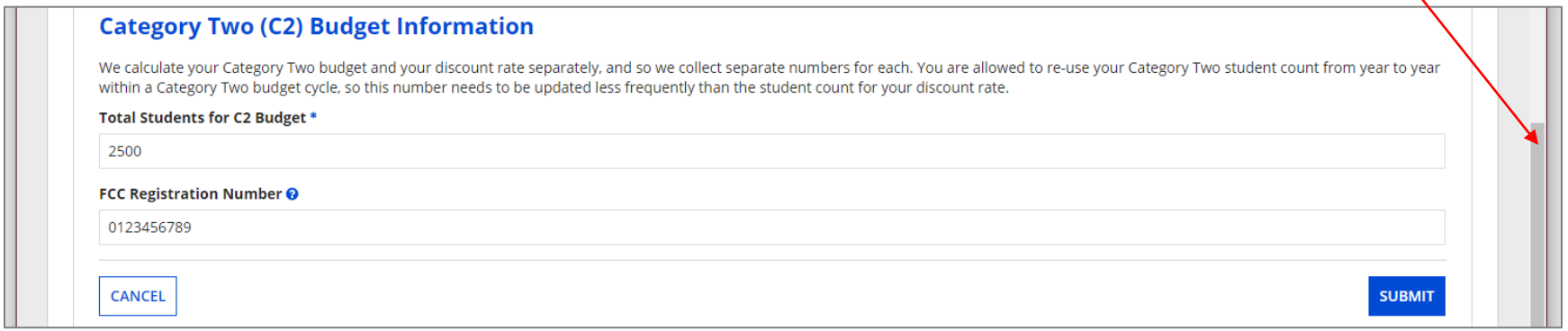
Independent Schools: C2 Data

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



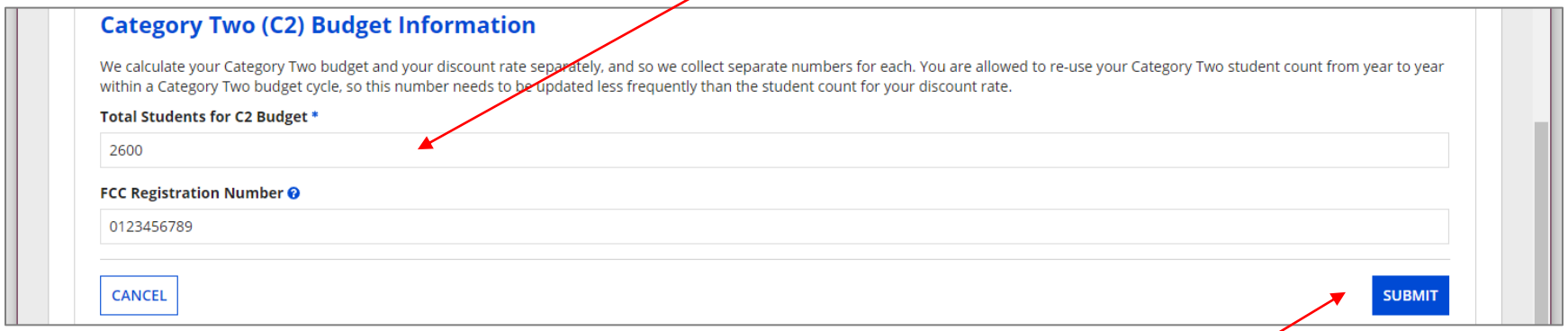
Independent Schools: C2 Data

⑤ Scroll down the page to the “Category Two (C2) Budget Information” section



Independent Schools: C2 Data

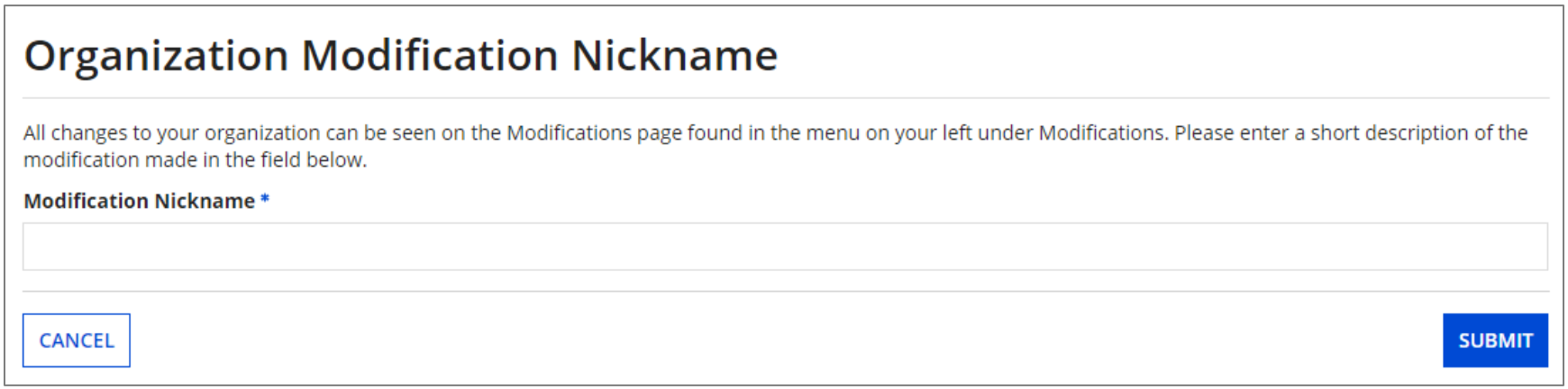
⑥ Enter the new number of students



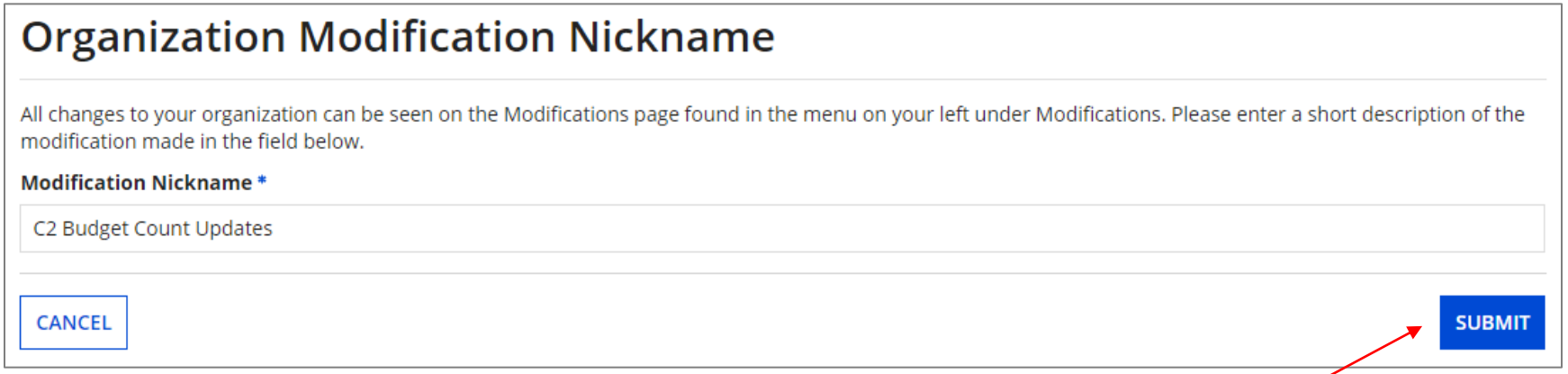
⑦ Then click on the “SUBMIT” button

Independent Schools: C2 Data

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



Independent Schools: C2 Data



⑨ Then click on the “SUBMIT” button

Independent Schools: Requesting a Replacement C2 Budget

→I 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 specifically request 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:

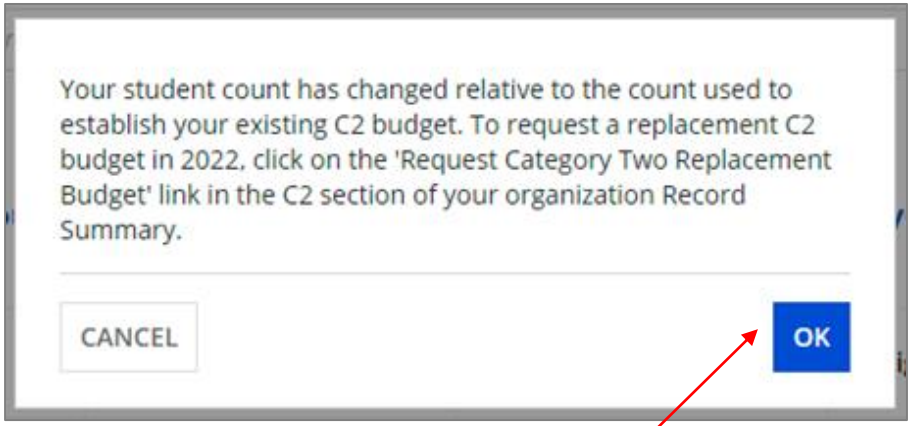
Only full-rights users can request replacement budgets. Partial-rights users can update organization details, but only users with full rights permissions will be able to update the C2 budget.

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.

Independent Schools: Replacement C2 Budget

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.



② Click on the “OK” button

Independent Schools: Replacement C2 Budget

③ Go to the school's summary page

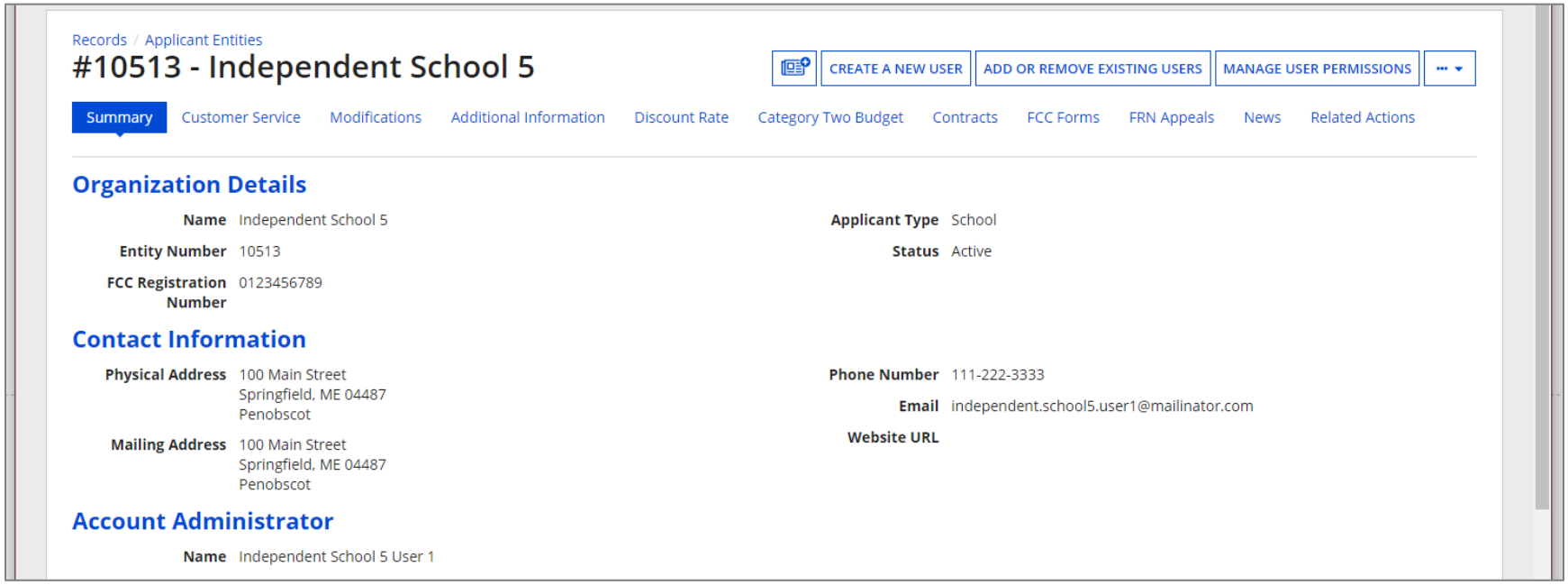
(you may already be on this page depending on your last action)

How to get there:

1) Click on the "News" link in the menu at the top of the page

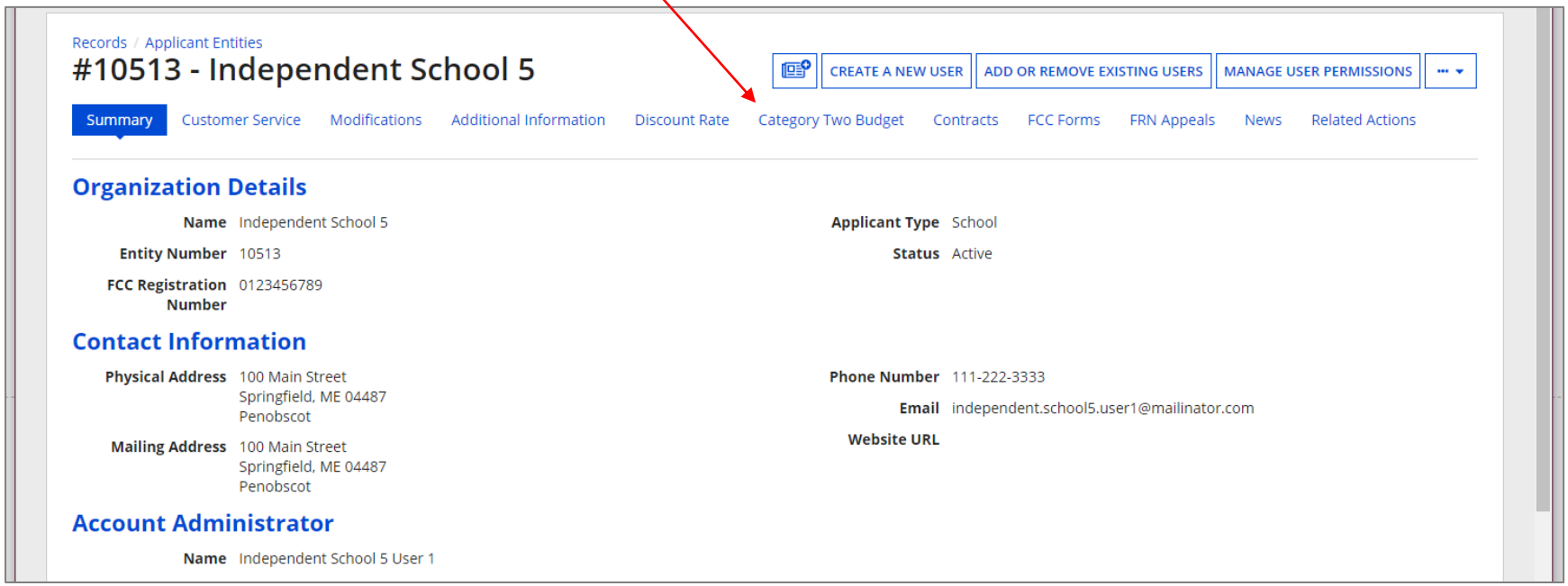
2) Click on the USAC logo to go to your Landing Page

3) Click on the link for the independent school's name

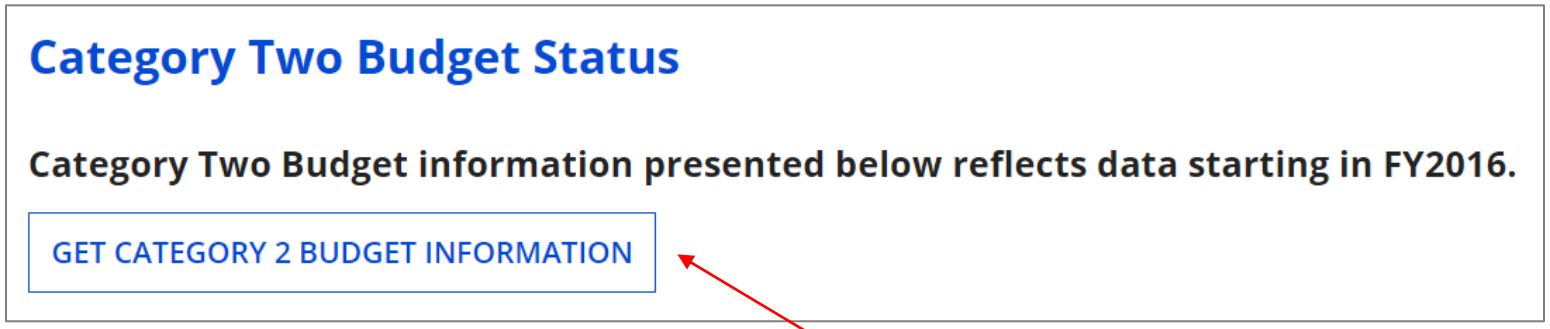


Independent Schools: Replacement C2 Budget

④ Click on the “Category Two Budget” link



Independent Schools: Replacement C2 Budget



⑤ Click on the “GET CATEGORY 2 BUDGET INFORMATION” button

Independent Schools: Replacement C2 Budget

Category Two Budget Status

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

2021 - 2025

2021 - 2022 (Budgeted Entity)

Show column definitions

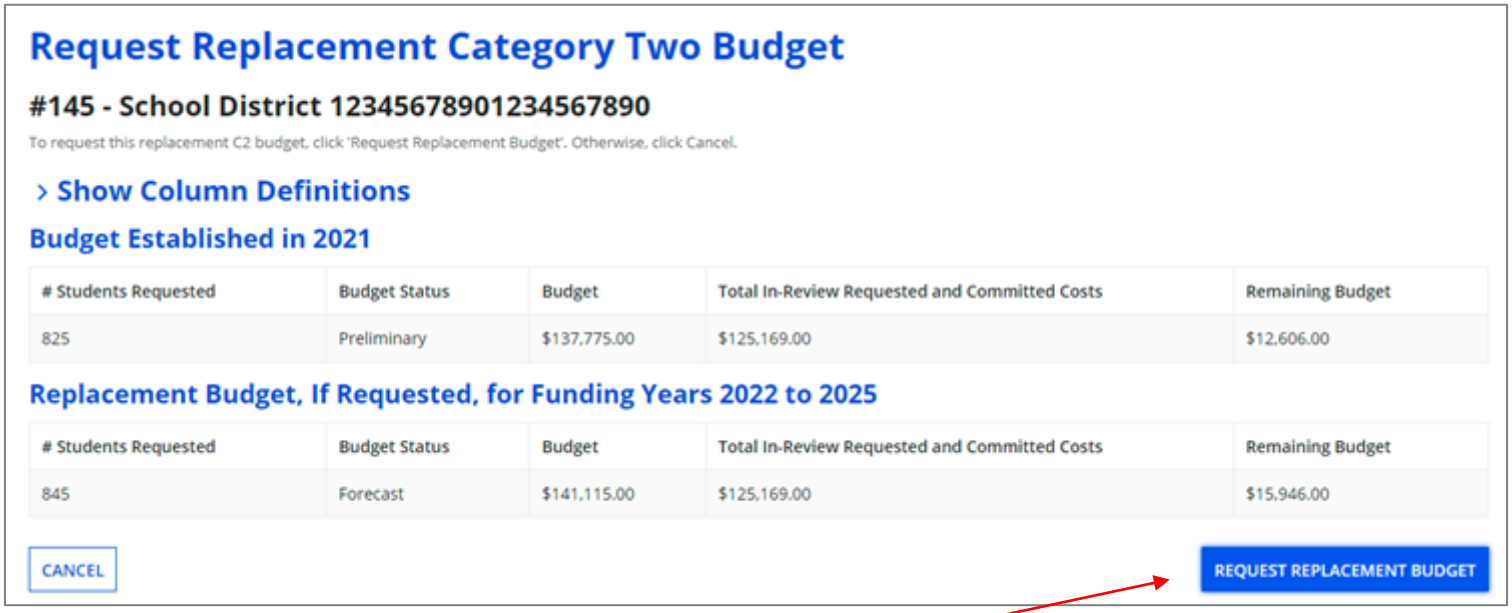
Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Preliminary	$142,618.00	$25,150.86	$0.00	$25,150.86	$117,467.14	View Details

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 Request Replacement C2 Budget.

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

Independent Schools: Replacement C2 Budget

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



Request Replacement Category Two Budget

#145 - School District 12345678901234567890

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
825	Preliminary	$137,775.00	$125,169.00	$12,606.00

Replacement Budget, If Requested, for Funding Years 2022 to 2025

# Students Requested	Budget Status	Budget	Total In-Review Requested and Committed Costs	Remaining Budget
845	Forecast	$141,115.00	$125,169.00	$15,946.00

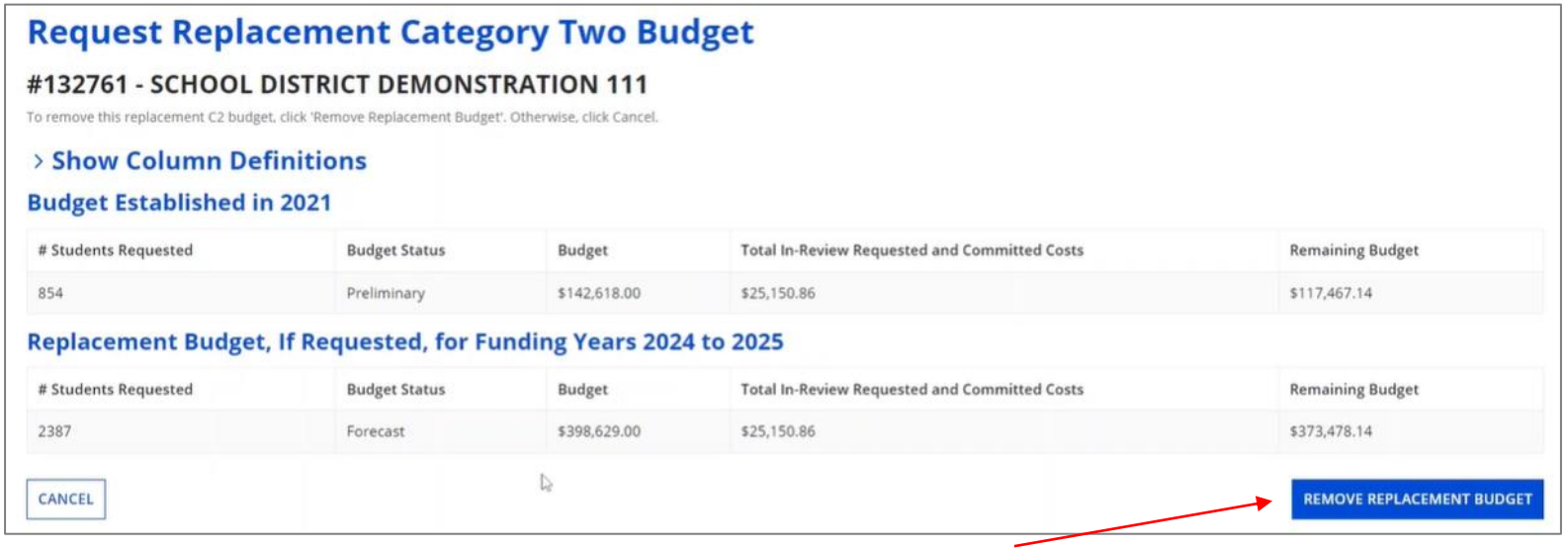
CANCEL

REQUEST REPLACEMENT BUDGET

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

Independent Schools: 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: 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.