



# Updating EPC Profiles

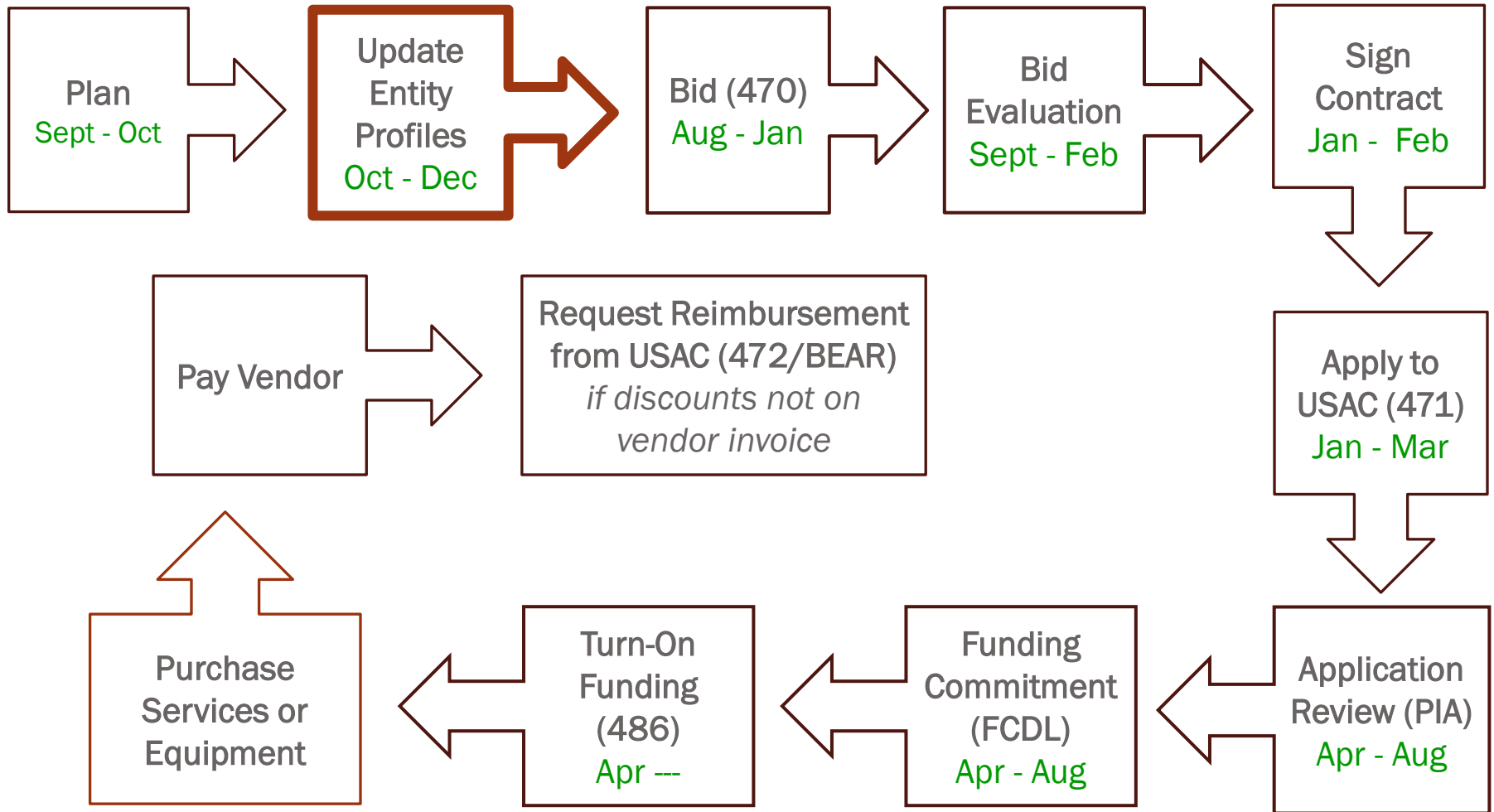
## FY 2021 (7/1/2021 – 6/30/2022)

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South Dakota State E-rate Coordinator  
November 2, 2020



# You are **here** in the E-rate process:



# Review of Entity Requirements

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- Each school and library that receives E-rate funded services or equipment must have an entity number.
- Each administrative building that is part of a school, district, library or library system that receives E-rate services must also have an entity number. These buildings are called “NIFs” – Non-instructional facilities.
- If there is more than one school located in the same physical building, each school should have its own entity number.

# EPC Profile Overview

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- All E-rate forms filed with the E-rate Administrator (Schools and Libraries Division [SLD]) are submitted online.
- E-rate Productivity Center [EPC] is the primary online system that Applicants use.
- “Entity Profiles” are stored in EPC that is then ported into your E-rate forms.
  - Recipients of service are listed on each application.
  - Discount calculations
  - Category 2 budgets

# Administrative “Admin” Window

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- Beginning October 19<sup>th</sup> entity profiles are “unlocked” and can be updated.
- The entity profiles will be locked a few days before the Form 471 filing window opens – usually around January 10<sup>th</sup>.
- Profiles must be stable and therefore locked during 471 filing window so that applications will be built using same entity profile data.

# Entity EPC Profile Information

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- Identify building subtypes.
- Confirm accuracy of name and physical address.
  - Information in EPC should match names and addresses on vendor bills.
- Schools submit enrollment and NSLP information that is used to calculate E-rate discount.
- Enrollment numbers are also provided in a different section to calculate Category 2 budgets for schools.
- Library square feet calculate Category 2 budgets for libraries.

# New Profile Fields for FY 2021

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- 3 new school subtypes
  - Each qualifies for \$25,000 minimum Category 2 budget.
- New section for Category 2 budget calculations
  - These fields may appear to replicate some other fields, but they are independent and not linked.

# 3 New School Sub-types

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- **General Use School**
  - Offers instruction to students drawn from other schools within a district, and student counts can change throughout the year. Some examples of general-use schools within a district are magnet schools, special education units, computer centers, or career centers
  - May or may not have enrollment and NSLP numbers or may use zeros
- **Detention Center**
  - Treated in the same way as a juvenile justice facility
  - May or may not have enrollment and NSLP numbers or may use zeros
- **Swing School**
  - Temporarily houses students from a school may need to be relocated due to closure, construction, or a revamping of their technological infrastructure at the school
  - **A swing school differs from an annex.** An annex is considered a part of the school it shares an entity number with rather than a temporary relocation site & does not need or have a separate entity #
  - A swing space – although associated with a school – is part of the school district where the school is located and **is** considered a separate school
  - Enrollment and NSLP fields are zeroed out and cannot be updated.
- *All 3 new subtypes qualify for \$25,000 minimum floor for Category 2!*



# Category 2 Budget Updates

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- New 5-year budget cycle begins this year, FY 2021 and runs through FY 2025.
  - Money from first cycle has been zeroed out.
- C2 Budgets are now administered at the district or library system level.
- C2 enrollment numbers may be constant or updated each year of budget cycle.
  - **Category 2 enrollment numbers in EPC are separate from discount enrollment numbers.**

# Calculation of C2 Budgets

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- **Single School**
  - $\$167 \times \text{total enrollment}$  OR  $\$25,000$
  - whichever total budget is greater
- **School District**
  - $\$167 \times \text{total district enrollment}$ , OR
  - $\$25,000 \times \text{total \# of schools in the district}$
  - whichever total budget is greater
- **Independent Library**
  - $\$4.50 \times \text{total square footage}$  OR
  - $\$25,000$
  - whichever total budget is greater
- **Library System**
  - $\$4.50 \times \text{total square feet of all library branches}$  OR
  - $\$25,000 \times \# \text{ branches}$
  - whichever total budget is greater



# Guide for Schools

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# Locating Individual School Profiles in EPC

**My Applicant Landing Page**

Training  
**Universal Service Administrative Co.**

Welcome, Lawrence School District

**Pending Inquiries**

Type: -- Select a Type --  
Application/Request: -- Enter an Application/Request ID or Nickname --  
Funding Year: -- Select a Funding Year --

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Users](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

1. Select hyperlink for Billed Entity

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

**Requested Discount Rate - Lawrence School District (BEN: 120) - FY2022**

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
640	447	70%	Rural	80%	80%

**SHOW ENTITIES**

2. Click on Discount Rate  
3. Click on Show Entities

# Open New Tab for Each Entity Then “Manage Organization”

[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
<a href="#">Lawrence Primary School</a>	121	420	404	Rural	None
<a href="#">Lawrence High School</a>	122	220	43	Rural	None

Organization	BEN	Total Number Of Students Enrolled In School	Total Number Of Students in School Eligible For NSLP	Urban/Rural Status	Alternative Discount
<a href="#">Lawrence Primary School</a>			404	Rural	None
<a href="#">Lawrence High School</a>			43	Rural	None

Right click on each school and open link in new tab.

Records / Applicant Entities

## #121 - Lawrence Primary School

[MANAGE ORGANIZATION](#) [MANAGE ANNEXES](#)

[Summary](#) [Modifications](#) [Additional Information](#) [Category Two Budget](#) [Contracts](#) [FCC Forms](#) [News](#) [Related Actions](#)

### Organization Details

**Name** Lawrence Primary School **Applicant Type** School

Select **Manage Organization** to get to editable fields

# Manage Organization – Basic Information

- Name
  - Physical Address
  - County
  - Urban or Rural
  - Mailing Address
- 
- Leave as is if ok or make corrections as needed.

### Modify An Organization

<b>Name*</b> <input type="text" value="Lawrence Primary School"/>	<b>Organization Type</b> Applicant
<b>Physical Address</b>	
<b>Address Line 1*</b> <input type="text" value="100 Main Street"/>	<b>Zip Code*</b> <input type="text" value="57732"/>
<b>Address Line 2</b> <input type="text"/>	<b>Zip Code Extension</b> <input type="text"/>
<b>City*</b> <input type="text" value="Deadwood"/>	<small>Click the button below to get standard USPS address</small>
<b>State*</b> <input type="text" value="SD"/>	<b>County*</b> <input type="text" value="Lawrence"/>
	<small>Please ensure that the address, city, state, and zip code are correct</small>
	<input type="button" value="VERIFY MY ADDRESS"/>
<b>Latitude / Longitude</b>	
<b>User-entered Latitude</b> <input type="text"/>	<b>Latitude</b> <input type="text"/>
<b>User-entered Longitude</b> <input type="text"/>	<b>Longitude</b> <input type="text"/>
	<input type="button" value="LOOKUP URBAN/RURAL STATUS"/>
<b>Urban/Rural</b>	
<b>User Entered Urban/Rural Status*</b> <input checked="" type="radio"/> Rural <input type="radio"/> Urban	<b>Urban/Rural Status</b> <input type="radio"/> Rural <input type="radio"/> Urban <small>Unable to determine your status. Please enter Urban/Rural manually in User-Entered field.</small>
<b>Mailing Address</b>	
<input checked="" type="checkbox"/> Mailing address is the same as physical address.	

# School Information

School Information is where the new entity sub-types appear & where the enrollment and NSLP #s are entered.

The values shown here are from the last time the information was updated.

## School Information

**School Sub-Type \***

- Public School
- Private School

**Check All That Apply** [Show Help](#)

- Pre-K
- Head Start
- Adult Education
- Juvenile Justice
- Dormitory
- Charter School
- Tribal School

**Is this school part of a school district?**

Yes

- New Construction School
- Swing Space
- Detention Center
- General-Use School
- ESA School
- BIE

**Number of Full Time Students \***

420

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

404

**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

# Enrollment and NSLP Numbers

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<b>Number of Full Time Students *</b> <input type="text" value="420"/>	<b>Total Number of Students Eligible for National School Lunch Program (NSLP) ⓘ *</b> <input type="text" value="404"/>
<b>Community Eligibility Program (CEP)? *</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Alternative Discount Method *</b> <input type="text" value="None"/>
<b>Does this organization have an endowment? *</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<small>Indicate if an alternative discount mechanism was used to calculate the number of students eligible for NSLP</small>

- Compare Fall 2019 and Fall 2020 information for accuracy.
- Use Fall 2020 data if accurate.
- If Fall 2020 data undercounts students and is not a complete data set, then use Fall 2019 data.
- You must use the same year's data for both enrollment and NSLP numbers.
  - Verify the data in these fields **either is Fall 2019 data or Fall 2020 data.**
  - School officials may email me if you need your Fall 2019 data.



# C2 Budget Information

Scroll down to this section at the bottom of the screen.

## 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 \*

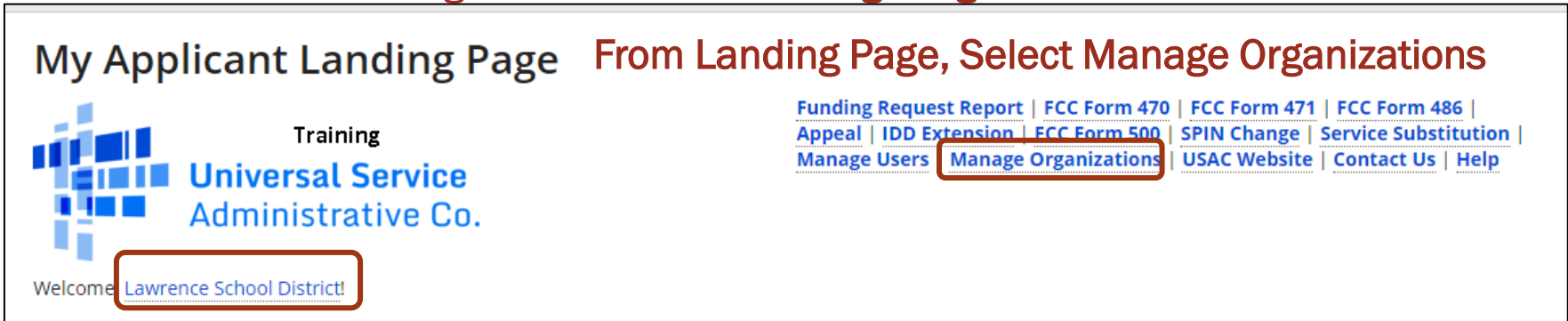
420

- **Total Students for C2 Budget** is from pre-existing information in EPC.
- Any update to enrollment numbers in the **School Information** section is **not** carried forward into this section.
- Use either Fall 2019 or Fall 2020 enrollment numbers for C2 budget info.
  - If you're using Fall 2019 enrollment and NSLP numbers for discount calculations but your enrollment has increased, then use Fall 2020 enrollment for C2 budget.
  - If you're using Fall 2020 enrollment and NSLP numbers for discount calculations, then use Fall 2020 enrollment for C2 budget.

# Districts with 10 or Fewer Schools

- Districts with 10 or fewer schools may have their C2 budget calculated by building and benefit from the greater of the minimum floor amount or the student multiplier of \$167 \* number of students.
- This “hybrid” approach maximizes C2 budgets.
- To benefit from this process, make sure the **District profile** is set correctly.
- Here we are returning to the BEN and **Manage Organization**.

**My Applicant Landing Page**    **From Landing Page, Select Manage Organizations**



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Welcome **Lawrence School District!**

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Users](#) | **Manage Organizations** | [USAC Website](#) | [Contact Us](#) | [Help](#)

# Scroll Down for C2 Budget Info

## 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  
640

### School Information

Entity Number or Name

[APPLY FILTERS](#) [CLEAR FILTERS](#)

Entity Number	Entity Name	Total Students for C2 budget	Is the student count estimated? 	Eligible for C2 budget?	
121	Lawrence Primary School	420	N/A		<a href="#">EDIT</a>
122	Lawrence High School	220	N/A		<a href="#">EDIT</a>

Select this radio button to report student counts by each school in order to maximize your C2 budget. If you don't, the system cannot calculate the most advantageous budget for you.

These #s will reflect updates to your school entity profiles.

« < 1-2 of 2 > »



# Guide for Libraries

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# Start at Landing Page

Landing Page > Billed Entity Hyperlink > Select Ellipses {...} > Manage Organization

**My Applicant Landing Page**

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Welcome **Ind Library 10071!**

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Users](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Records / Applicant Entities  
**#4093 - Ind Library 10071**

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 F

Related Actions

**Organization Details**

<b>Name</b>	Ind Library 10071	<b>Applicant Type</b>	Library
<b>Entity Number</b>	4093	<b>Status</b>	Active
<b>FCC Registration Number</b>	0123456789		

**Contact Information**

<b>Physical Address</b>	Address1	<b>Phone Number</b>	012-345-6789
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Manage Organization  
Modify Account Administrator  
Create a Customer Service Case  
Manage General Contact  
Manage Annexes  
Manage Organization Relationships  
Create FCC Form 470  
Create FCC Form 471  
Create FCC Form 486  
Manage Contracts  
Create Appeal

# Verify/Update Basic Information

## Modify An Organization

Name \*

Ind Library 10071

Organization Type

Applicant

### Physical Address

Address Line 1 \*

Address1

Zip Code \*

20850

Address Line 2

Zip Code Extension

City \*

Rockville

Click the button below to get standard USPS address

County \*

Please select a County

State \*

MD

Please ensure that the address, city, state, and zip code are correct

VERIFY MY ADDRESS

Make sure the rural/urban status is selected to ensure the entity's discount will compute.

### Latitude / Longitude

User-entered Latitude

User-entered Longitude

Latitude

Longitude

LOOKUP URBAN/RURAL STATUS

### Urban/Rural

User Entered Urban/Rural Status \*

- Rural  
 Urban

Urban/Rural Status

- Rural  
 Urban

Unable to determine your status. Please enter Urban/Rural manually in User-Entered field.

### Mailing Address

Mailing address is the same as physical address.

# C2 Budget Info & Linked School District

## Library Information

### Library Sub-Type \*

- Public Library
- Private Library

Is this library part of a library system?

No

### Check All That Apply

- Academic
- Research
- Tribal Library
- Bookmobile
- Kiosk
- New Construction Library
- Main Branch
- State Library Agency - Library

### FSCS KEY

### FSCS SEQ

## Category Two Budget Information

### Square Footage \*

1238

Verify accuracy of Square Footage

Verify accuracy of associated School District

## Associated School District

BEN	NAME	CITY	STATE	ZIP CODE
306	School District 10001	Rockville	MD	20850

If this library is no longer a main branch, please unselect the Main Branch Checkbox

### Search for School Districts

#### BEN Search

#### Name Search

#### State Search

Please select a value

#### Zip Code Search

CLEAR FILTERS SEARCH

### FCC Registration Number ⓘ

0123456789

# Next Steps

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- Verify discount is calculated for each district and library system.
- Landing Page > Click on BEN Hyperlink > Discount Rate
- If discount is shown, all good.
- If not, click on **Show Entities** and figure out which discount is not computing, and go back to Manage Organization for that entity, and fix problem.
  - Usually the rural/urban selection has not been made.