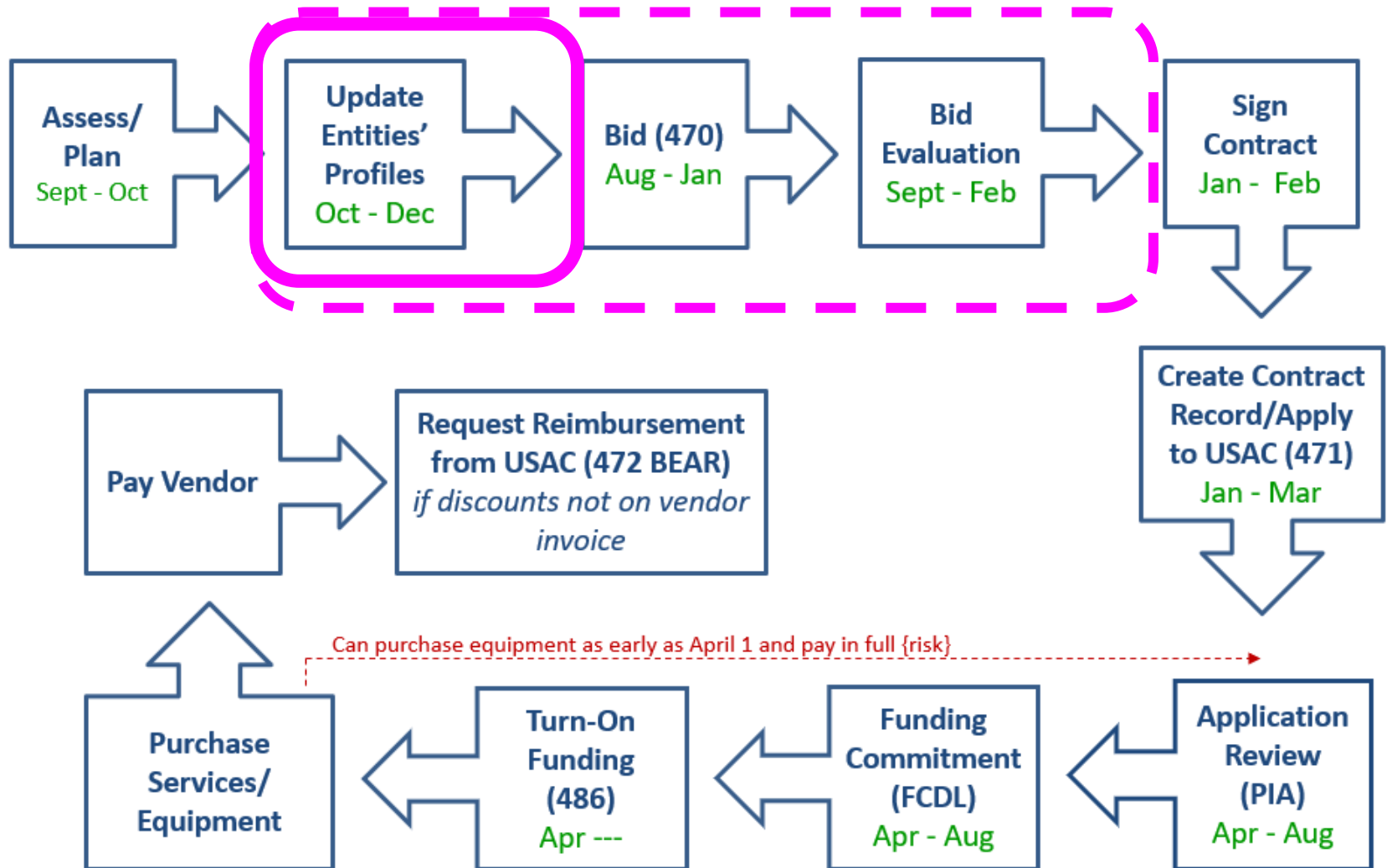# Guide to Updating Category 2 Budget Data & Discount Calculation Data for FY 2022

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You are here in the FY 2022 E-rate process:

Purpose of this Guide:

This Guide has three purposes:

- Demonstrate how applicants update their Category 2 enrollment data
  - Note: libraries enter square footage data instead of enrollment data
- Demonstrate how applicants request a C2 Replacement Budget
- Demonstrate how applicants update their enrollment/NSLP data in each school's EPC profiles for the purpose of calculating their E-rate discount for the upcoming funding year
  - Libraries do not enter discount-rate data; their Form 471s will automatically pull the discount data from the public school district in which they are located

What is the Admin Window?

- All C2 budget data and discount calculation data is updated during the 3-month period before the Form 471 application window called the 'Admin Window'

- The Form 471 does not ask applicants to enter their enrollment and NSLP data in the actual Form 471 application

  - Form 471 will then pull the enrollment/NSLP data from the schools' profiles to calculate the appropriate district-wide E-rate discounts

  - Category 2 budgets are calculated based on district-wide enrollments

    - System-wide square footage for libraries

  - Consortia 471s will automatically pull the discount data from each consortia member's EPC profiles

Updating Data after Admin Window

- After the Admin Window closes in early January, the school data will be "locked down" and the Form 471 window will open
  - It will not be possible to update this data in EPC after the Admin Window closes because that data will be linked to active library and consortia applications
    - If new schools open <u>after</u> the 471 window opens, call USAC at 888-203-8100 and they will try to figure out a work-around in these rare situations
  - Corrections can be made to data by using the RAL Correction Process <u>after</u> the Form 471 has been submitted
    - PIA will review the RAL correction during the application review
    - Not ideal and likely will delay the approval of your application

Where to Obtain Enrollment/NSLP Data

- Schools typically use the enrollment/NSLP data submitted to the Dept. of Education on their October NSLP Claim Form
  - Although you can use more recent data, the official PDE data is what USAC's PIA team uses to validate your data
  - If you use different data, just be prepared to justify that data during your PIA review
- **COVID Update:** USAC has announced that schools will be permitted to use FY 2020 or FY 2021 enrollment and NSLP data
  - Typically, discount rates rarely go up or down from year to year; therefore, it is highly likely that most schools will choose to <u>not</u> update the enrollment and NSLP data in each school's EPC profiles this year, assuming the data in the profile is from fall 2019 or fall 2020
  - If your E-rate discount will increase by using the most current data (Oct 2021) you should update the enrollment and NSLP data in EPC for each school before the close of the Admin Window which is expected to be around January 8

UPDATING CATEGORY 2 ENROLLMENT DATA

Category 2 Budget Calculation Data

- Schools can use different enrollment figures for their Category 2 budget calculations than what is used in the discount calculation data
- Then, in future years that C2 enrollment data will remain the same unless the enrollment increases in which case they can update the data to claim a higher Category 2 budget for the remainder of the current C2 budget cycle (FY 2021 – FY 2025)
  - However, if the enrollment decreases, schools are not required to make any adjustments and the higher enrollment data (and higher C2 budget) will remain
  - Must request C2 Replacement Budget in EPC after C2 enrollment is updated

Where to Update C2 Enrollment Data

- Schools enter their Category 2 enrollment data in a new location in EPC – at the bottom of their School District's Manage Organization page in a new section called "Category Two (C2) Budget Information"
  - In this section, districts can enter their district-wide enrollment total, or their school-level enrollments
  - Data entered on a school's EPC profile will NOT be transferred to the C2 budget page
- *Why would a district want to update enrollment at the school building level instead of using the aggregate district-level enrollment?* **$$$**
  - If a district has 10 or fewer schools, and any of those schools has fewer than 150 students, it will be advantageous for the district to enter enrollment data by school so the EPC system will use the "hybrid" method of calculating C2 budgets, thus giving the district a higher budget
  - Districts with 11 or more schools are not eligible to use the hybrid method and have no reason to consider entering their enrollment data by school

Updating C2 Budget Profile

Updating C2 Budget Profile

Manage Organizations

Existing Organizations

	Billed Entity Name	City	State
☑	THE BEST SCHOOL DISTRICT - (PARENT ENTITY)	Springfield	PA

CANCEL

MANAGE ORGANIZATION

Updating C2 Budget Profile

Scroll to the bottom of this page until you see this:

C2 Budget Information Section

This is the section you're looking for on the Manage Organization Page

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

5761

School Information

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?	
109	Plainfield Elementary School	349	N/A	✅	EDIT
10597	Gallaudet Elementary School	234	N/A	✅	EDIT

How to Enter C2 Enrollment Data

A) Select "**One number for my whole district**" if:
1) No schools have < 150 students, <u>or</u>
2) There are more than 10 schools in district

… then enter the district-wide student enrollment in the text box

How does the district report its student count for Category Two budget? ❓ *
- ⦿ One number for my whole district
- ◯ A number for each school in the district

District Student Count *

[   ]

B) Select "**A number for each school in the district**" if:
1) At least one school has < 150 students, <u>and</u>
2) There are more than 10 schools in district

… then enter each school's enrollment data in the fields below

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

If Entering Enrollment by School (B)

Entity Number	Entity Name	Total Students for C2 budget	Is the student count estimated? ❓	Eligible for C2 budget?	
109	Plainfield Elementary School	115	N/A	✅	EDIT

Click 'EDIT' and the enrollment field becomes editable.

Entity Number	Entity Name	Total Students for C2 budget	Is the student count estimated? ❓	Eligible for C2 budget?	
109	Plainfield Elementary School	115	N/A	✅	UPDATE
10597	Gallaudet Elementary School	227	N/A	✅	EDIT
10598	Boone Middle School	344	N/A	✅	EDIT
10599	Franklin High School	555	N/A	✅	EDIT
10600	Bluford Middle School	1234	N/A	✅	EDIT
10601	Guggenheim Elementary School	456	N/A	✅	EDIT
10602	Anderson Elementary School	1234	N/A	✅	EDIT

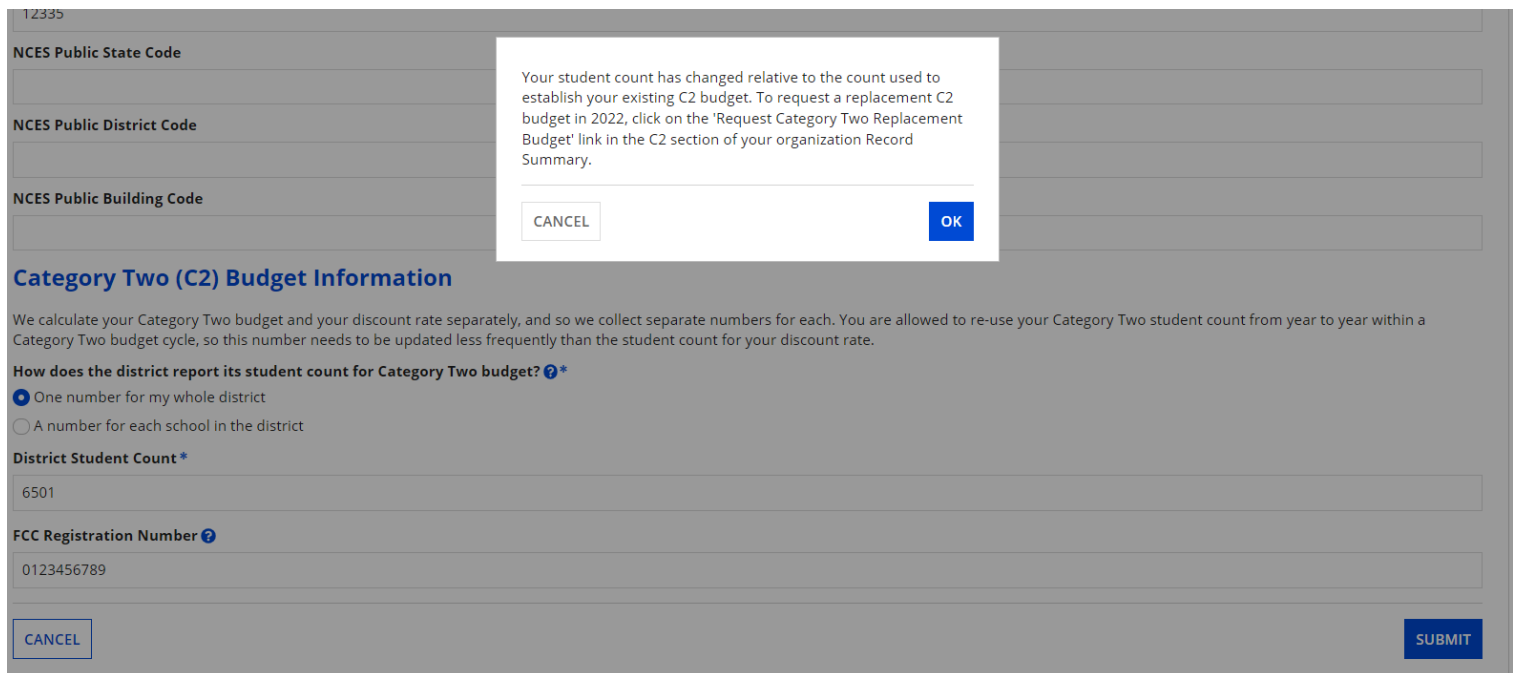Enter the enrollment data, then click 'UPDATE.'

Don't forget to click 'Submit'

SUBMIT

Alternative Method of Entering C2 Data

- If using option B (entering enrollment by school), and if also updating each school's enrollment and NSLP data for the year, applicants can update their C2 enrollment at the bottom of each school's EPC profile page
  - This data is then updated on the district's Manage Organization page for that school
  - Entering the enrollment in the discount calculation section will NOT update the C2 enrollment data
    - Those two datasets are not linked

Next: Request a C2 Replacement Budget

- After you update the C2 enrollment (by school or by district), or update library square footage, you will see this pop-up box, reminding you to request a C2 Replacement Budget

3 Ways to Request C2 Replacement Budget

a)   Task Will Appear

→ Me

Request Replacement C2 Budget for #108

37 minutes ago ☆

b)   Related Actions (lightening bolt page)

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

News   **Related Actions**

⚡ **Request Replacement Category Two Budget**
Request an update to the C2 budget established by a prior C2 FCC Form 471 in the same budget cycle.

— Scroll to the bottom of the list:

b)   Summary

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

News   Related Actions

Your student count has changed relative to the count used to establish your existing C2 budget. To request a replacement C2 budget in 2022, click **Request Replacement C2 Budget.**

C2 Replacement Budget Page

- Click 'Request Replacement Budget'

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

# Students Requested	Budget Status	Budget	Total In-Review Requested and Committed Costs	Remaining Budget
6502	Forecast	$1,085,834.00	$91,578.26	$994,255.74

CANCEL   REQUEST REPLACEMENT BUDGET

- PIA will then validate this updated enrollment number during their review
- If approved, it will be locked-in for FY 2022 – 2025 unless a new replacement budget is requested in future funding years

How to See Updated C2 Budget $

- Use USAC's C2 Database at: https://opendata.usac.org/E-rate/E-rate-C2-Budget-Tool-FY2021-/8z69-hkn7
- Updated nightly
- Use filters and enter

Billed Entity Number (BEN)

▼ Filters   ✕

Clear All

State

Select...   ⌄

Applicant Type

Select...   ⌄

City

Select...   ⌄

Billed Entity Name

Select...

BEN

Select...   ⌄

Consulting Firm Name (CRN)

Select...   ⌄

BEN   IS   ⌄

🔍 Search all values

SELECTED VALUES

▼ 125326   ✕

VALUE MOST COMMON TO LEAST COMMON

(No value)

10005

100072

100124

Reset   **Apply**

C2 Budget

BEN	Bille...	City	State	Appli...	Cons...	C2 B...	Child...	C2 B...	Full T...	Libra...	Scho...	Libra...	C2 B...
125326	ALBERT G...	UNIONTO...	PA	School DI...	Intermedi...	FY2021-2...	8	Per Site B...	3,317		$167.00		$553,939....

UPDATING DISCOUNT DATA IN SCHOOL PROFILES

Where to Modify Enrollment/NSLP Data in EPC

From your Landing Page...

My Applicant Landing Page

Training
Universal Service Administrative Co.

Welcome, THE BEST SCHOOL DISTRICT - (PARENT ENTITY)!

Step 1: Click on a district's name to see their profile data

Step 2: Click "Discount Rate" to see a list of schools for your entity

Records / Applicant Entities
#108 - THE BEST SCHOOL DISTRICT - (PARENT ENTITY)

Summary   Customer Service   Modifications   Additional Information   **Discount Rate**   Category Two Budget

FRN Appeals   News   Related Actions
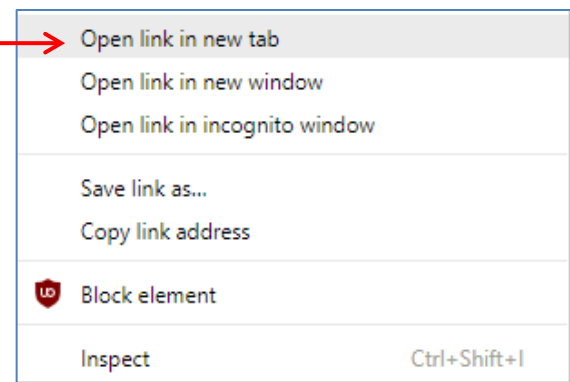
Opening Each School's EPC Profile

Step 3: Click "Show Entities" and the list of schools will appear (not NIFs)

School District Full-time Enrollment	School District NSLP Count
5761	4820

SHOW ENTITIES

Entity Details

Organization	BEN
Plainfield Elementary School	109
Gallaudet Elementary School	10597
Boone Middle School	10598
Franklin High School	10599
Bluford Middle School	10600
Guggenheim Elementary School	10601
Anderson Elementary School	10602

Step 4: Right Click on each school name and select "Open link in new tab."
Do this consecutively for each school name on the list. This will create a tab at the top of your browser – one for each school.

Open link in new tab
Open link in new window
Open link in incognito window

Save link as...
Copy link address

Block element

Inspect   Ctrl+Shift+I

Editing Each School's EPC Profile

Step 5: Click on the tab for the first school, and then click "MANAGE ORGANIZATION" to open the "editable" version of the page.

Edit the School's Profile Data:
NON CEP Schools

Step 6: Scroll down the page to the Enrollment and NSLP data and update.

Enrollment data

If you have part-time students, enter those totals here (if none, you must enter 0):

Number of Full Time Students *

409

Peak Number of Part-Time Students *

0

Total Number of Part-Time Students *

0

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

209

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

Total Free/Reduced Lunch data

System requires an answer to whether you used a survey or sibling match

Edit the School's Profile Data:
CEP-Participating Schools

Step 6: Scroll down the page to the Enrollment and CEP % data and update.

Enrollment data

If you have part-time students, enter those totals here (if none, you must enter 0):

Number of Full Time Students *

409

Peak Number of Part-Time Students *

0

Total Number of Part-Time Students *

0

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

362

Community Eligibility Program (CEP)? *

● Yes
○ No

CEP Percentage *

55.30%

This figure is calculated automatically based on enrollment and CEP% data.

Use 'CEP Percentage' data from PDE File

Codes = Optional

- These code fields are all <u>optional</u>. If you try entering data and receive a red error message, just erase the data and submit

State School Code

106172003

State LEA Code

NCES Public State Code

NCES Public District Code

NCES Public Building Code

FCC Registration Number ❓

0012722211

Modification Nickname Action Required

- After you "submit" the updated data, the system will ask you to give the modification a nickname

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

- You can simply click the space bar to proceed to Submit

Returning to the List of Schools

- To update the next school's data, click on the next tab, then Manage Organization to make the form "editable."

Reviewing Your Discount Rate

Step 7: After you've updated the data for each school, return to the first tab, which will be the Discount Rate page. Click on Discount Rate again for the discounts to update

Step 8: Ensure your data is accurate

– If they do not match the totals you have, click on "SHOW ENTITIES" to determine where the inaccurate data exists

Summary   Customer Service   Modifications   Additional Information   **Discount Rate**   Contracts   FCC Forms

FRN Appeals   News   Related Actions

Requested Discount Rate - DU BOIS AREA SCHOOL DISTRICT (BEN: 125407) - FY2017

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	Voice Discount Rate
3575	1890	53%	Rural	80%	80%	

SHOW ENTITIES

Reviewing Your Discount Rate

- If you receive this message, it means there is data missing from one or more schools in your district

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

- Click 'Show Entities' to determine which school(s) have problems

This discount rate has not been approved for the current year

School District Full-time Enrollment	School District NSLP Count	School District NSLP Percent
3575	1890	53%

SHOW ENTITIES

Entity Details

Organization	BEN	Total Number Of Students Enrolled In School	Total Number Of Students in School Eligible For NSLP
WASSON ELEMENTARY SCHOOL	17255	409	305
DU BOIS AREA MIDDLE SCHOOL	17260	910	
JUNIATA ELEMENTARY SCHOOL	17261	391	179
DU BOIS AREA SR HIGH SCHOOL	17262	1060	446
OKLAHOMA ELEMENTARY SCHOOL	17264	361	149

If a field is blank, this is where the problem exists

Updating School 'Subtypes'

- If one of your schools qualifies as one of the three new school subtypes, and therefore is put into the C2 budget calculation mix, make that designation on that school's EPC profile page:

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

Review…

- **Check EPC building list:** Review existing school/library building list and contact USAC if any schools/libraries will be opening/closing for FY 2022
- **Category 2:** If applying for C2 for FY 2022 and enrollment has increased from what is currently in your EPC profile (likely from Oct 2019 or October 2020):
  - Update C2 Budget Data under Manage Organization
  - For districts with 10 or fewer schools, if at least one of your schools has fewer than 150 students, enter enrollment data by school and select:

  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

  - Request C2 Replacement Budget in EPC
- **Discount Data:** If operating NSLP this year, and discount rate will increase due to higher NSLP participation, update each school's EPC profile with most recent enrollment/NSLP (or CEP%) data