

# Guide to Updating Category 2 Budget Data & Discount Calculation Data for FY 2023

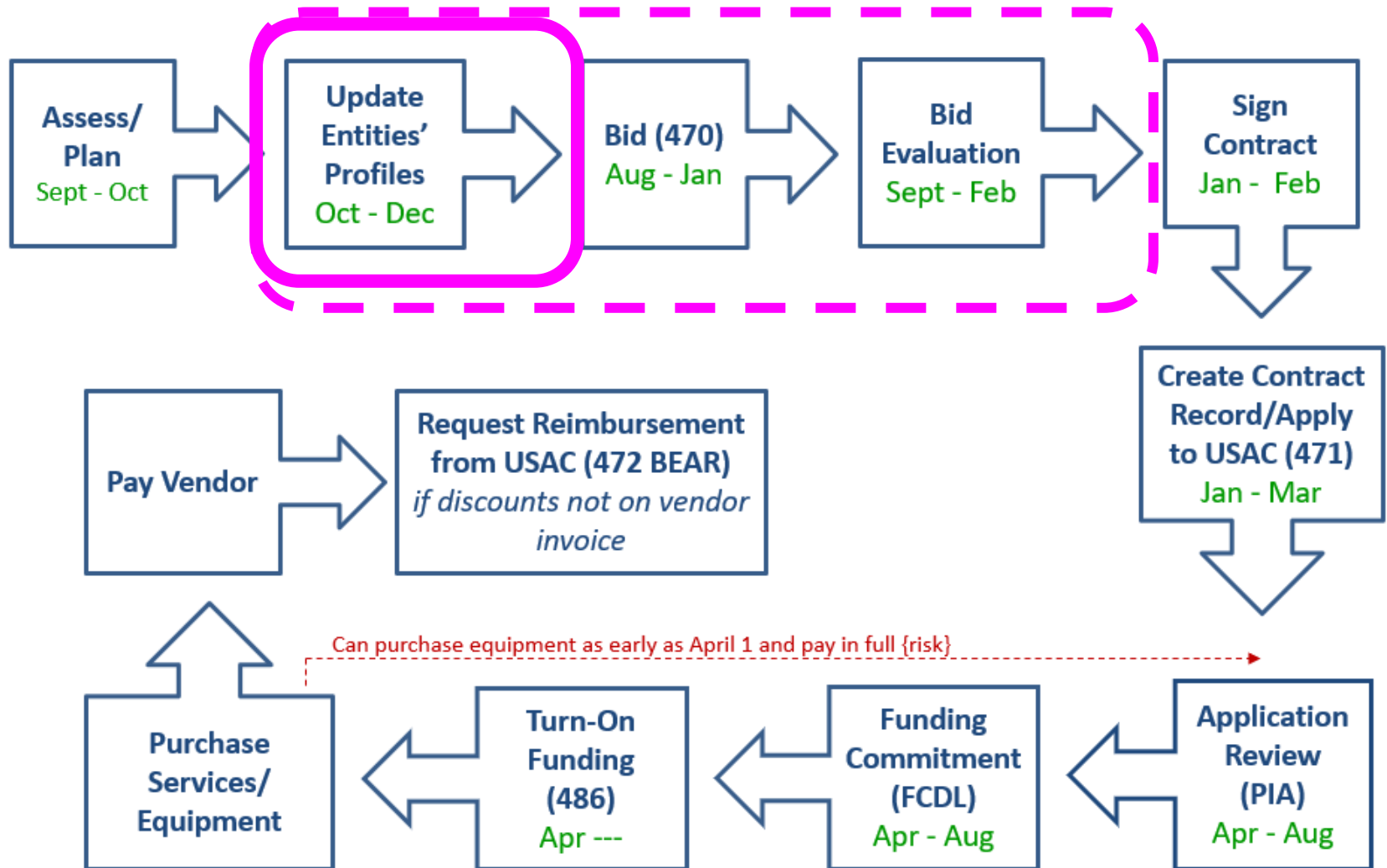
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December 2022

# You are here in the FY 2023 E-rate process:

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# Purpose of this Guide:

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## This Guide has two purposes:

- Demonstrate how applicants update their Category 2 enrollment data – **slide 7**
  - Note: libraries enter square footage data instead of enrollment data
- 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 – **slide 20**
  - 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?

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- 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'
  - Admin Window for FY 2023 opened October 25, 2022 and will close in early January 2023 (date not yet set)
- 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

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- After the Admin Window closes in early January, the school profile 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 after 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 after 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

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- 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 DOE 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
- In mid-December, PDE released the “draft enrollment/NSLP data” that schools submitted in the PEARs system in October 2022
  - Schools technically have until December 30, 2022 to update this data
  - Schools that no longer participate in the NSLP program will not have data in this report, but must still provide the NSLP eligibility data in their EPC profiles
  - Draft report also contains CEP % for schools that are CEP schools

# UPDATING CATEGORY 2 ENROLLMENT DATA



# Category 2 Budget Calculation Data

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- School Category 2 budgets are calculated based on enrollment
- C2 enrollments are not required to be updated each year
- If the enrollment increases and a school is applying for C2 that year, they can update their C2 enrollment data in EPC in order to receive 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
- **Important:** If the school has previously applied for C2 in this budget cycle (FY 2021 – FY 2025), and they are requesting an increased C2 budget, they must request a Category 2 Budget Replacement with USAC to have the updated enrollment validated during PIA review
  - If this is the first year in this C2 budget cycle that a school is seeking C2, no C2 Budget Replacement must be requested



# How to Request C2 Replacement Budget

- 1) After updating C2 enrollment data under “Manage Organization,” select “Category Two Budget” tab



- 2) Then select “Get Category 2 Budget Information”



- 3) Then select “Request Replacement C2 Budget”

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.](#)

- 4) Then select “Request Replacement Budget”




--- > USAC has a good video that shows how to request a C2 Replacement Budget:  
<https://www.usac.org/video/sl/request-category-two-replacement-budget/index.html>

# Where to Update C2 Enrollment Data


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- Schools enter their Category 2 enrollment data under “Manage Organization: at the bottom of the page in a 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

News Tasks (2) Records Reports Actions  Appian

## My Applicant Landing Page



Training  
**Universal Service  
Administrative Co.**

Welcome, THE BEST SCHOOL DISTRICT - (PARENT ENTITY)

[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](#)

# Updating C2 Budget Profile

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## Manage Organizations

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### Existing Organizations

<input checked="" type="checkbox"/>	Billed Entity Name	City	State
<input checked="" type="checkbox"/>	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:

**Modify An Organization**

**Name \***  
THE BEST SCHOOL DISTRICT - (PARENT ENTITY)

**Organization Type**  
Applicant

**Physical Address**

**Address Line 1 \***  
100 Main Street

**Address Line 2**  
Apt 2

**City \***  
Springfield

**State \***  
PA

**Zip Code \***  
19064

**Zip Code Extension**

**County \***  
Please select a County

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

**Mailing Address**

Mailing address is the same as physical address.

**Category Two (C2) Budget Information**

# 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

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A) Select **“One number for my whole district”** if:

- 1) No schools have < 150 students, or
- 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, and
- 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		<input type="button" value="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	<input type="text" value="115"/>	N/A		<input type="button" value="UPDATE"/>
10597	Gallaudet Elementary School	227	N/A		<input type="button" value="EDIT"/>
10598	Boone Middle School	344	N/A		<input type="button" value="EDIT"/>
10599	Franklin High School	555	N/A		<input type="button" value="EDIT"/>
10600	Bluford Middle School	1234	N/A		<input type="button" value="EDIT"/>
10601	Guggenheim Elementary School	456	N/A		<input type="button" value="EDIT"/>
10602	Anderson Elementary School	1234	N/A		<input type="button" value="EDIT"/>

Enter the enrollment data, then click 'UPDATE.'



# Don't Forget to 'Submit'

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- After entering the district-wide enrollment or the school building enrollment data, be certain to click the Submit button at the bottom of the page:



SUBMIT

- If the data isn't 'submitted,' it won't be captured by the system and used to calculate your C2 budget

# Alternative Method of Entering C2 Data

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- 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

# 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 Name or Billed Entity Number (BEN)

**C2 Budget**  
↓

BEN	Bille...	City	State	Appl...	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

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## From your Landing Page...

My Applicant Landing Page



Training  
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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

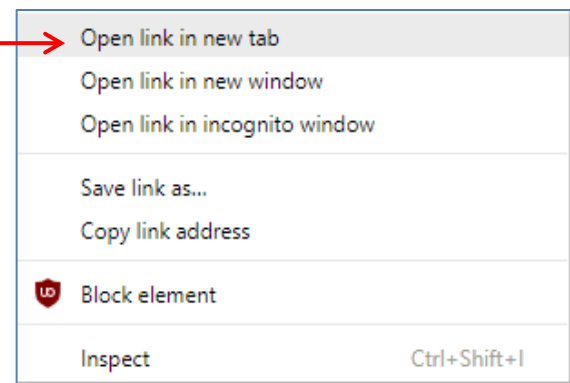
**Step 3: Click "Show Entities" and the list of schools will appear (not NIFs)**

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.**



# 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.**



The screenshot shows a web browser with several tabs open, including '#108 - THE BEST', '#109 - Plainfield E', '#10597 - Gallaudet', '#10598 - Boone', '#10599 - Franklin', '#10600 - Bluford', '#10601 - Guggen', and '#10602 - Anderso'. The browser address bar shows the URL 'portal-training.usac.org/suite/tempo/records/item/IMB0YLZsM4yuY0N6bx2pGHWU-FkqFcd37sG3MvQkUvoA8\_8GUqJVlv2ULESBxPxY11k\_5erAycPH054qmWqBLJAwXUXekpCiMfW0dxxXIC'. The main content area has a navigation bar with 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. Below this, the page title is 'Records / Applicant Entities' followed by '#109 - Plainfield Elementary School'. A 'Summary' button is highlighted in blue. To the right, a 'MANAGE ORGANIZATION' button is circled in red. Below the title, there are several menu items: 'Modifications', 'Additional Information', 'Category Two Budget', 'Contracts', 'FCC Forms', 'News', and 'Related Actions'.

# Edit the School's Profile Data: NON CEP Schools

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

**Enter Enrollment Data**

Number of Full Time Students \*

349

Community Eligibility Program (CEP)? \*

Yes

No

**Enter NSLP Eligibility Data**

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

319

Alternative Discount Method \*

None

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



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

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

**Enter Enrollment Data**

Number of Full Time Students \*

349

Community Eligibility Program (CEP)? \*

Yes

No

**Select "Yes" under CEP? Then enter CEP % and select Base Year from PDE File**

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

309

CEP Percentage \*

55.30%

CEP Base Year \*

- Select Base Year -

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

# Codes = Optional

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

<b>State School Code</b>
106172003
<b>State LEA Code</b>
<b>NCES Public State Code</b>
<b>NCES Public District Code</b>
<b>NCES Public Building Code</b>
<b>FCC Registration Number</b> <a href="#">?</a>
0012722211

# Modification Nickname Action Required

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- 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 \***

- 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."



A screenshot of a web application interface. The browser's address bar shows the URL: portal-training.usac.org/suite/tempo/records/item/IUB0YLZsM4yuY0N6bx2pGHWU-FkqFcd37sG3MvQkUvoA8\_8GUqJVlv2ULESBxPxYI1k\_5erAycPH054qmWm7pGGtm69HxVGerzNANsBpMT. The page has a blue navigation bar with tabs for News, Tasks (2), Records, Reports, and Actions. The 'Records' tab is active. Below the navigation bar, the page title is 'Records / Applicant Entities' and the main heading is '#10597 - Gallaudet Elementary School'. To the right of the heading is a 'MANAGE ORGANIZATION' button, which is highlighted with a red rectangular box. Below the heading are several tabs: Summary (active), Modifications, Additional Information, Category Two Budget, Contracts, FCC Forms, News, and Related Actions. Under the 'Organization Details' section, the 'Name' is 'Gallaudet Elementary School' and the 'Applicant Type' is 'School'.

# 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

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### 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](#)

<input type="checkbox"/> Pre-K	<input type="checkbox"/> New Construction School
<input type="checkbox"/> Head Start	<input type="checkbox"/> Swing Space
<input type="checkbox"/> Adult Education	<input type="checkbox"/> Detention Center
<input type="checkbox"/> Juvenile Justice	<input type="checkbox"/> General-Use School
<input type="checkbox"/> Dormitory	<input type="checkbox"/> ESA School
<input type="checkbox"/> Charter School	<input type="checkbox"/> BIE
<input type="checkbox"/> Tribal School	

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