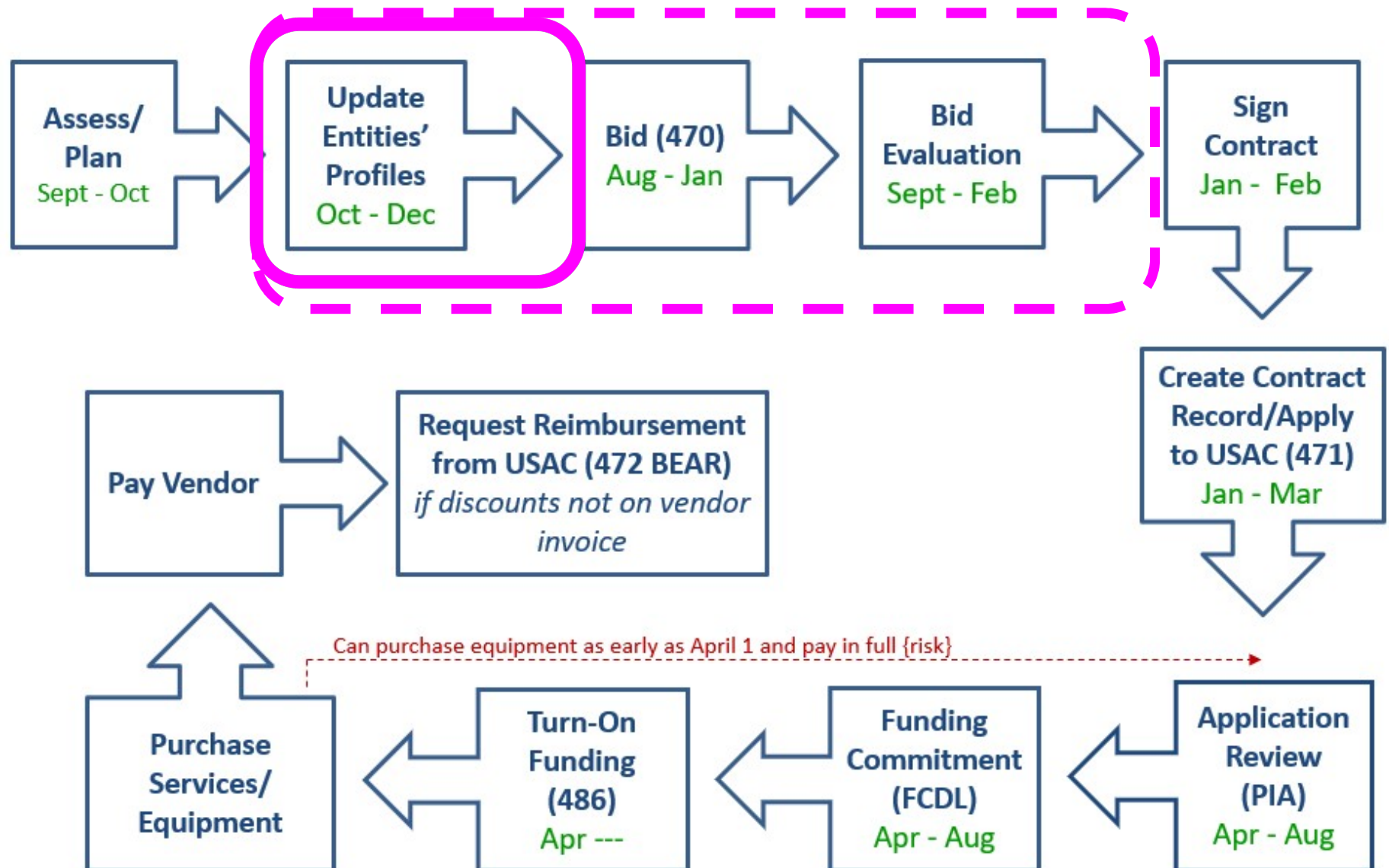# Guide to:

- Updating Discount Calculation Data

- Updating Category 2 Enrollment

- Updating Library Square Footage

- Requesting Category 2 Replacement Budget

- Locating Category 2 Budget Amounts

Prepared by Lorrie Germann
PA E-Rate Coordinator
for the Pennsylvania Department of Education
December 2025

You are here in the FY2026 E-Rate process:

Assess/ Plan
Sept - Oct

Update Entities' Profiles
Oct - Dec

Bid (470)
Aug - Jan

Bid Evaluation
Sept - Feb

Sign Contract
Jan - Feb

Create Contract Record/Apply to USAC (471)
Jan - Mar

Application Review (PIA)
Apr - Aug

Funding Commitment (FCDL)
Apr - Aug

Turn-On Funding (486)
Apr ---

Purchase Services/ Equipment

Can purchase equipment as early as April 1 and pay in full {risk}

Pay Vendor

Request Reimbursement from USAC (472 BEAR)
if discounts not on vendor invoice

Purpose of this Guide:

This Guide has multiple purposes:

- Demonstrate how schools 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 7
  - 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
- Demonstrate how schools update their Category 2 enrollment data – slide 19
  - Note: libraries enter square footage data instead of enrollment data
- Demonstrate how libraries update their square footage data – slide 31
- Demonstrate how schools and libraries request a Category 2 Replacement Budget – slide 37
- Demonstrate where to see the updated Category 2 budget information – slide 39

What is the Admin Window?

- Every year, schools must update their EPC profiles during the 2-3 month "Admin Window" to reflect new data for the upcoming funding year
  - Admin Window for FY2026 opened in October 2025 and will close in early January 2026
- What must be updated?
  - Discount calculation data (enrollment and NSLP/CEP% data) in each school's EPC profile
  - Category 2 enrollment data (if increased from prior year)
- Form 471 pulls this data from schools' and libraries' EPC profiles to calculate appropriate discount rates for the upcoming funding year
  - No enrollment/NSLP data is actually entered into the Form 471
  - Library data is derived from the NSLP eligibility of the school district in which the main library is located
  - 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 EPC profile data will be "locked down," and the Form 471 window will open
  - It is not 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 workaround 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 to 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 DOE data is what USAC's PIA team uses to validate your data
  - If you use different data or don't participate in NSLP, be prepared to justify that data during your PIA review
- In mid-December, PDE releases the "draft enrollment/NSLP data" that schools submitted in the PEARs system in October 2025
  - Schools technically have until December 30, 2025 to update this data with PDE
  - 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 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

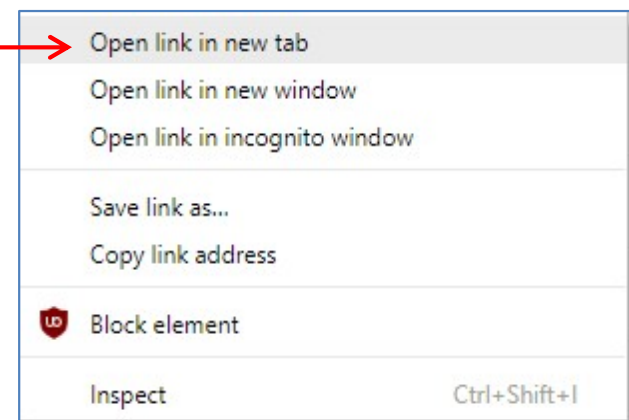**Step 2: Click "Discount Rate" to see a list of schools for your entity**

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
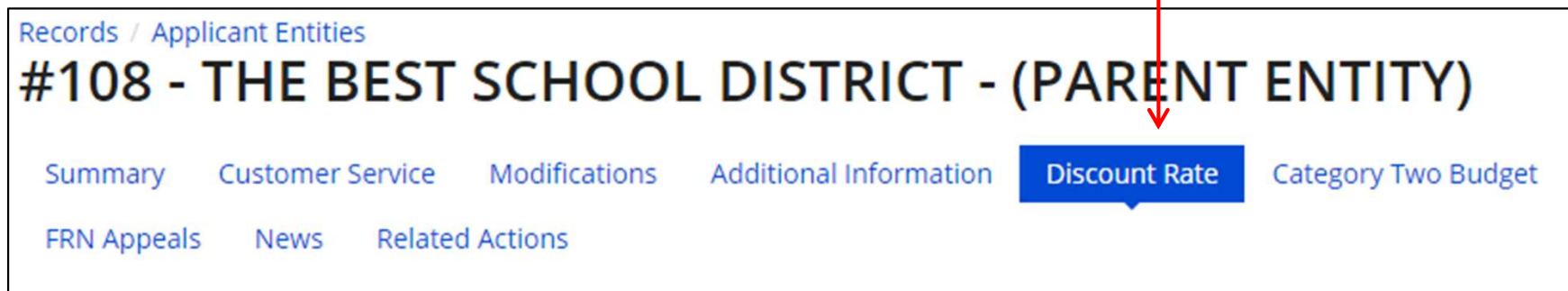
Opening Each School's EPC Profile

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.

Enter Enrollment Data

Enter NSLP Eligibility Data

Number of Full Time Students *

349

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

319

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

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

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

Number of Full Time Students *

349

Community Eligibility Program (CEP)? *

● Yes
○ No

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

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

309

CEP Percentage *

55.30%

CEP Base Year *

- Select Base Year - ▼

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

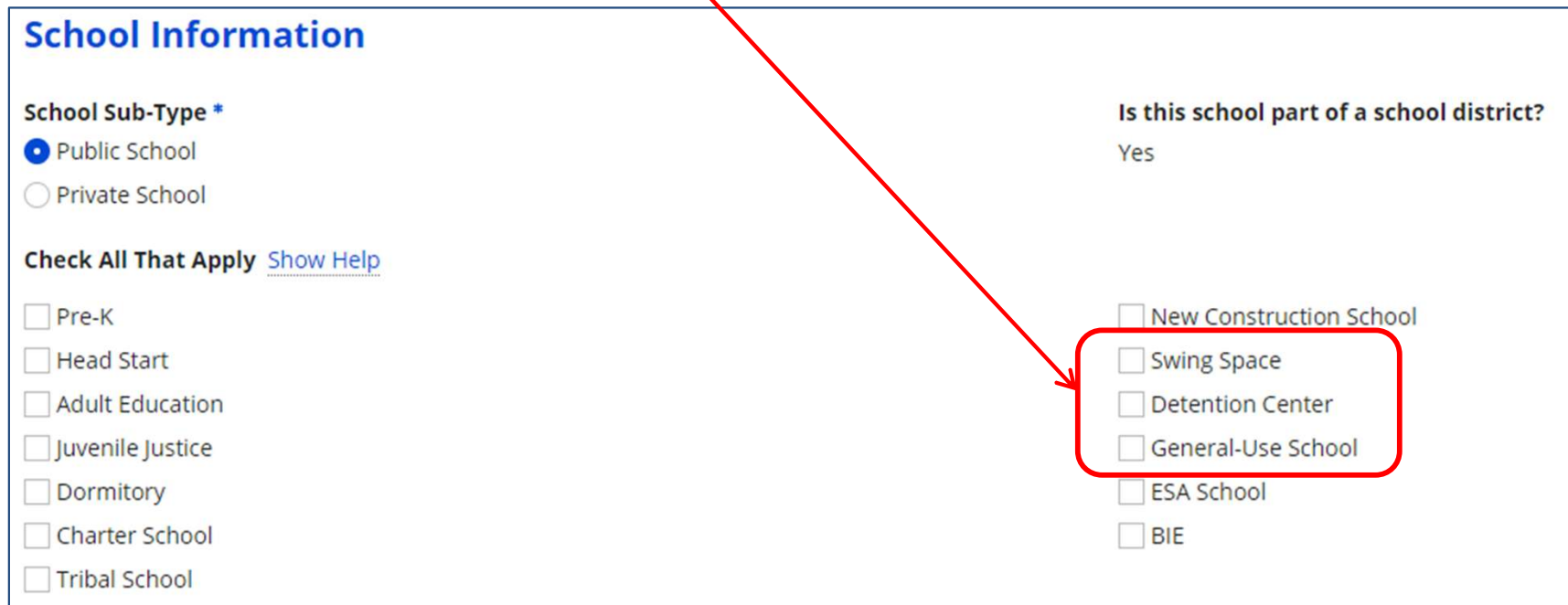| School District Full-time Enrollment	School District NSLP Count	School District NSLP Percent	School District Urban/Rural Status	Category One Discount Rate	Category Two Discount Rate	Voice Discount Rate
3575	1890	53%	Rural	80%	80%	

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 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

SCHOOLS: UPDATING CATEGORY 2 ENROLLMENT DATA

New 5-Year Category Two (C2) Budget Cycle

- FY2026 will be the first year of the new FY2026–FY2030 Category Two (C2) budget cycle

- Any unused funds from the FY2021–FY2025 C2 budget cycle did not roll over

- <mark>Important</mark>: Because Category 2 budgets are calculated based on the enrollment of the first year the school applies for C2 funding within the new FY2026-FY2030 budget cycle, schools will be **required** to update their enrollments in the first year they apply for C2 support during the 5-year period

- If the enrollment increases in a future year of the budget cycle and a school is applying for C2 that year, they can update their C2 enrollment data in EPC and request a C2 Budget Replacement to receive a higher Category 2 budget for the remainder of the C2 budget cycle (FY2026–FY2030)

  - Requesting a Category 2 Budget Replacement will notify USAC to have the updated enrollment validated during PIA review

  - However, **if the enrollment decreases**, schools **are not required to make any adjustments**, and the higher enrollment data (and higher C2 budget) will remain

  - C2 enrollments are not required to be updated each year

FY2026-FY2030 C2 Budget Multipliers

Schools
- $201.57/student
- $30,175 funding floor

  - This means a school **with fewer than 150 students**
    ($201.57/student * 149 students = $30,033.93)
    receives the funding floor

Libraries
- $5.43/square foot
- $30,175 funding floor

  - This means a library **with less than 5,5558 square feet**
    ($5.43/square feet * 5,557 square feet = $30,174.51)
    receives the funding floor

The C2 budget is calculated at the <u>school district</u> or <u>library system</u> <u>level</u> based on the combined enrollment or square footage

Where to Update C2 Enrollment Data

- Schools may 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 **discount calculation** 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--
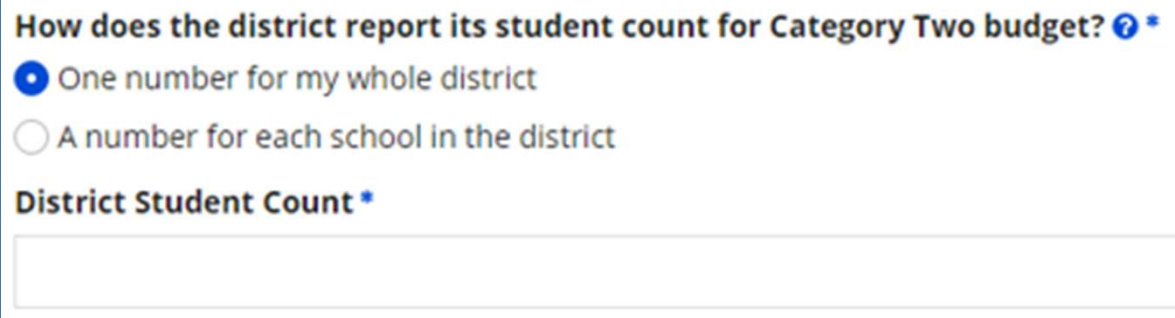
APPLY FILTERS   CLEAR FILTERS

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

26

How to Enter C2 Enrollment Data

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? ❓ *
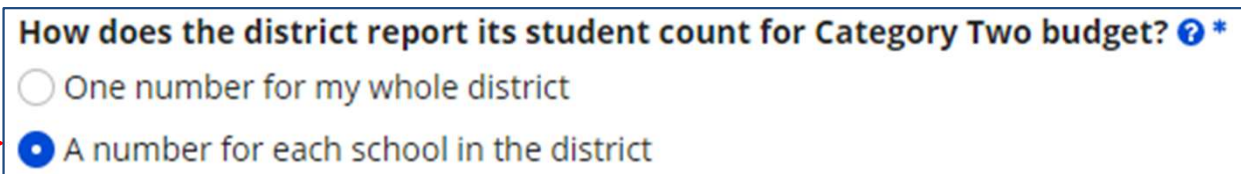- ● One number for my whole district
- ○ A number for each school in the district

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

27

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 'Submit'

- 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

- If updating each school's enrollment and NSLP data for the year, applicants can update their C2 enrollment at the very 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

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 *

374

FCC Registration Number ❓

0123456789

CANCEL   SUBMIT

UPDATING LIBRARY SQUARE FOOTAGE

Category 2 Budget Calculation Data

- Library Category 2 budgets are calculated based on the square footage of the first year the library applies for Category 2 funding within the new FY2026–FY2030 C2 budget cycle

- If the square footage increases and a library is applying for C2 that year, they can update their square footage data in EPC to receive a higher Category 2 budget for the remainder of the C2 budget cycle (FY2026 – FY2030)
    - However, if the square footage decreases, libraries are not required to make any adjustments, and the higher square footage data (and higher C2 budget) will remain

- Important: If the square footage increases in a future year of the budget cycle and a library is applying for C2 that year, they can update their square footage in EPC and request a C2 Budget Replacement to receive a higher Category 2 budget for the remainder of the C2 budget cycle (FY2026–FY2030)

- Requesting a Category 2 Budget Replacement will notify USAC to have the updated square footage data validated during PIA review
    - If this is the first year in the new C2 budget cycle that a library is seeking C2, no C2 Budget Replacement must be requested

- Libraries enter their square footage data under "Manage Organization" at the bottom of the page

Updating Library Square Footage Data

On your EPC Landing Page, click on your library's name under the USAC logo to reach the 'lightening bolt page', then select 'Related Actions'

Updating Library Square Footage Data

Then select 'Manage Organization' from the list

Records / Applicant Entities

#4093 - Ind Library 10071

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

FCC Forms   FRN Appeals   News   **Related Actions**

Create a New User
This function allows you to create a user for your entity.

Add or Remove Existing Users
This process allows user to add and remove users from an organization

Manage User Permissions
This function allows you manage the permissions for one or more users.

Manage Organization
This function allows you to update information about an entity or BEN.

Updating Library Square Footage Data

On this page, scroll to the bottom of this page until you see this:

News   Tasks (1)   Records   Reports   **Actions**   appian

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 *

Click the button below to get standard USPS address

County *

Category Two Budget Information

Square Footage *

1238

Enter the updated square footage data for your library here

Square footage must be provided to qualify for Category Two funding.

Then click 'Submit'

SUBMIT

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Reminders: Library Square Footage

- Independent Libraries: Square footage data **should include areas off-limits to the public**
- Library Systems: Square footage data must be reported for each branch library and not at the system level.
  - Square footage will not be entered for separate administrative buildings

How to Validate Square Footage Data:
- USAC will accept official validation e-mail from PDE, a floor plan, video, or walkthrough. **or**, the "**IMLS Library Search & Compare**" site at https://www.imls.gov/search-compare

New Libraries or Libraries Under Construction:
- Library buildings under construction can enter square footage for the soon-to-be new library

Bookmobile or Kiosk Square Footage:
- A bookmobile or kiosk must be listed with some positive square footage in EPC. If not, those entities will not be eligible for Category 2 support

HOW TO REQUEST A CATEGORY 2 REPLACEMENT BUDGET

How to Request C2 Replacement Budget

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

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

2) Then select "Get Category 2 Budget Information"

Category Two Budget Status

Category Two Budget information presented

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"

REQUEST REPLACEMENT BUDGET

--- > USAC also 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

HOW TO SEE THE UPDATED CATEGORY 2 BUDGET

How to See Updated C2 Budget $ –

- Use USAC's C2 Database at:
  - E-Rate C2 Budget Tool FY2021+
- Updated nightly
- Use filters and enter
  - Billed Entity Name <u>or</u>
  - Billed Entity Number (BEN)

Review these columns:

C2 enrollment currently in EPC

5-Year Pre-Discount C2 Budget

Full T... ⋮	Librar... ⋮	Scho... ⋮	Librar... ⋮	C2 Bu... ⋮	C2 Bu... ⋮	Fund... ⋮	Pendi... ⋮	Avail... ⋮
1,950		$201.57		$393,061...	Forecast	$0.00	$0.00	$393,061...

"Funded" amount from FY2026-FY 2030

Any Amount "pending" in FY2026-2030

C2 Budget