E-rate Update for the PA Association of Career & Technical Administrators
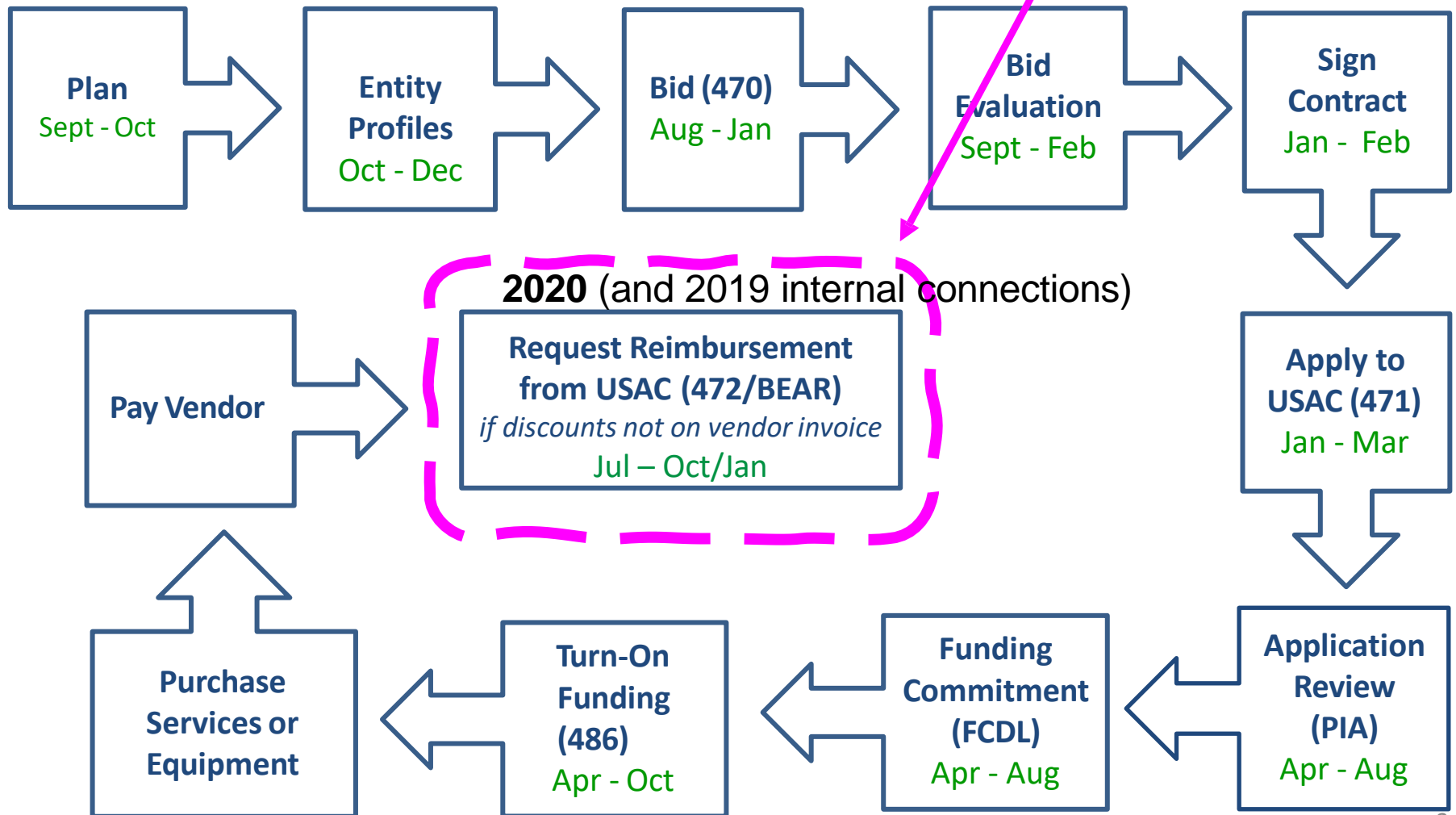
Presented by Julie Tritt Schell
PA E-rate Coordinator
for the Pennsylvania Department of Education
October 2021
www.e-ratepa.org

…Finishing Funding Years 2019 & 2020

The E-rate Cycle

Plan
Sept - Oct

Entity Profiles
Oct - Dec

Bid (470)
Aug - Jan

Bid Evaluation
Sept - Feb

Sign Contract
Jan - Feb

2020 (and 2019 internal connections)

Request Reimbursement from USAC (472/BEAR)
if discounts not on vendor invoice
Jul – Oct/Jan

Pay Vendor

Apply to USAC (471)
Jan - Mar

Purchase Services or Equipment

Turn-On Funding (486)
Apr - Oct

Funding Commitment (FCDL)
Apr - Aug

Application Review (PIA)
Apr - Aug

BEAR Reimbursement Deadlines

FY 2020

- Recurring services – October 28, 2021 deadline
    - C1 FRNs with imminent BEAR deadlines: http://e-ratepa.org/?p=33683
    - If your entity is on this list request an invoice deadline extension in EPC
        - \> Name of Entity > Related Actions > Invoice Deadline Extension Request
        - One FRN per request
- Non-recurring purchases - January 28, 2022 is the invoicing deadline
    - See http://e-ratepa.org/wp-content/uploads/2014/03/FY-2020-BEARs-Due-Non-Recurring-Purchases-as-of-10-20.xlsx for list of FY 2020 FRNs with $0 disbursed

FY 2019

- FCC extended deadline to purchase/install FY 2019 equipment until September 30, 2021, so this BEAR deadline is also January 28, 2022
    - See http://e-ratepa.org/wp-content/uploads/2014/03/FY-2020-BEARs-Due-Non-Recurring-Purchases-as-of-10-20.xlsx for list of FY 2019 FRNs with $0 disbursed

Changes to BEAR Log-In System

- BEAR PINs have been eliminated because applicants now enter the BEAR Form via the One Portal System
  - But each EPC User must have 'permission' in EPC to file a BEAR
  - If you previously had a BEAR PIN, permission was automatically granted

E-rate Productivity Center (EPC) - E-rate Program participants use the E-rate Productivity Center to manage program processes, receive notifications and to contact customer service.

FCC Form 472 (BEAR) - Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount amount of the eligible products or services that the applicant has received and paid for in full.

Click here for BEAR Form

Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications for reimbursement and review notifications regarding their program activities.
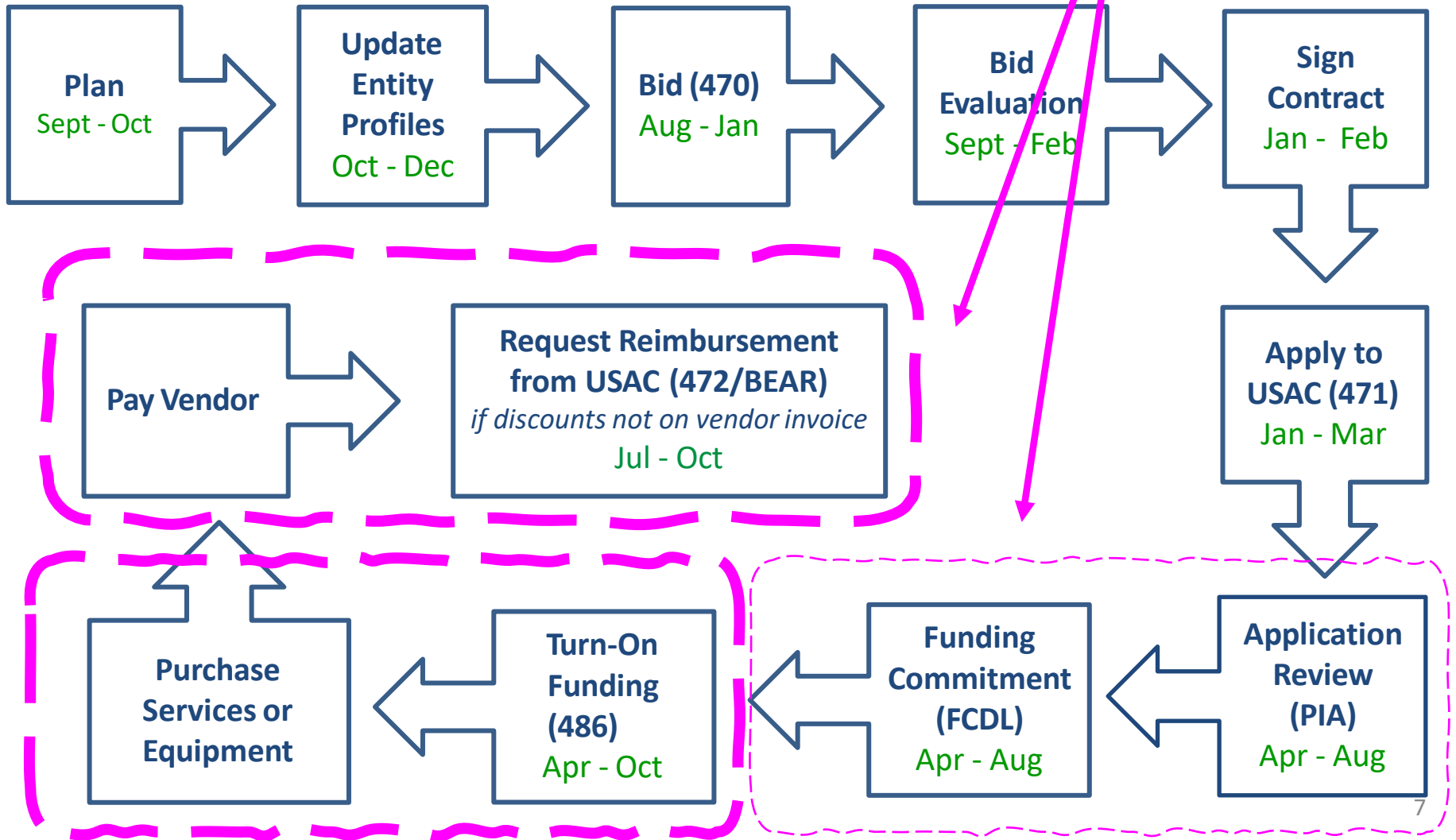
- If you log-in to One Portal and <u>don't</u> see the BEAR option, simply complete the BEAR Access Template and submit to USAC
  - Template available at: https://www.usac.org/e-rate/resources/forms/bear-form-access/
  - Submit in EPC using 'Contact Us' feature
  - BEAR permission will be granted within a week
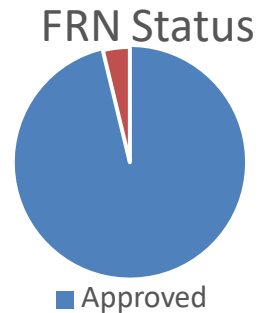 - Request invoice deadline extension…

Finishing FY 2021

The E-rate Cycle

For FY 2021, we are here

Plan
Sept - Oct

→

Update Entity Profiles
Oct - Dec

→

Bid (470)
Aug - Jan

→

Bid Evaluation
Sept - Feb

→

Sign Contract
Jan - Feb

↓

Apply to USAC (471)
Jan - Mar

↓

Application Review (PIA)
Apr - Aug

←

Funding Commitment (FCDL)
Apr - Aug

←

Turn-On Funding (486)
Apr - Oct

←

Purchase Services or Equipment

↑

Pay Vendor

→

Request Reimbursement from USAC (472/BEAR)
if discounts not on vendor invoice
Jul - Oct

Status of PA FY 2021 FCDLs

FRN Status

■ Approved

- 2383 FRNs submitted
  - $62.8 million committed thus far
    - $31.3 funded for Category 2
  - 91 FRNs still "pending" for 28 entities
    - Requesting about $3.8 million
    - About 1/3 are for Category 2
- Compared to the same time last year, we are at about the same place
- Seeing delays in processing post-commitment requests (SPIN changes, service substitutions, appeals)
  - If you've had a post-commitment request pending more than 60 days, use Contact Us feature in EPC to request that it be escalated
- Denials in FY 2021: On red light status, duplicate services, no 470 posted, couldn't supply bids, bid wrong category, lack of detail on 470, didn't reply to PIA request, didn't bid both lit/dark fiber, ineligible equipment, MIBS 470 didn't provide enough details
- Who needs to submit Form 486s for FY 2021?
  - http://e-ratepa.org/wp-content/uploads/2014/03/FY2021-Form-486s-Due-as-of-10-20.xlsx

Emergency Connectivity Fund (ECF) Update

ECF Update

Window 1: 317 applicants

- Total Requested: $99,748,595.39
  - Equipment: $62,970,850
    - \# Laptops/Tablets Requested: 200,851
    - \# Wi-Fi Hotspots (equipment) Requested: 22,993
  - Services: $36,777,744
    - \# Mobile Broadband Service Plans Requested: 65,189
  - Network Buildout to Unserved Homes
    - -- $18,878,447
    - -- Requested by 12 applicants (11 schools/1 consortia)
- Total Funded, Waves 1-2: $38,551,737

Window 2: 94 applicants (requested data not yet available)

- Don't forget to collect signed "unmet needs certifications" from parents/teachers
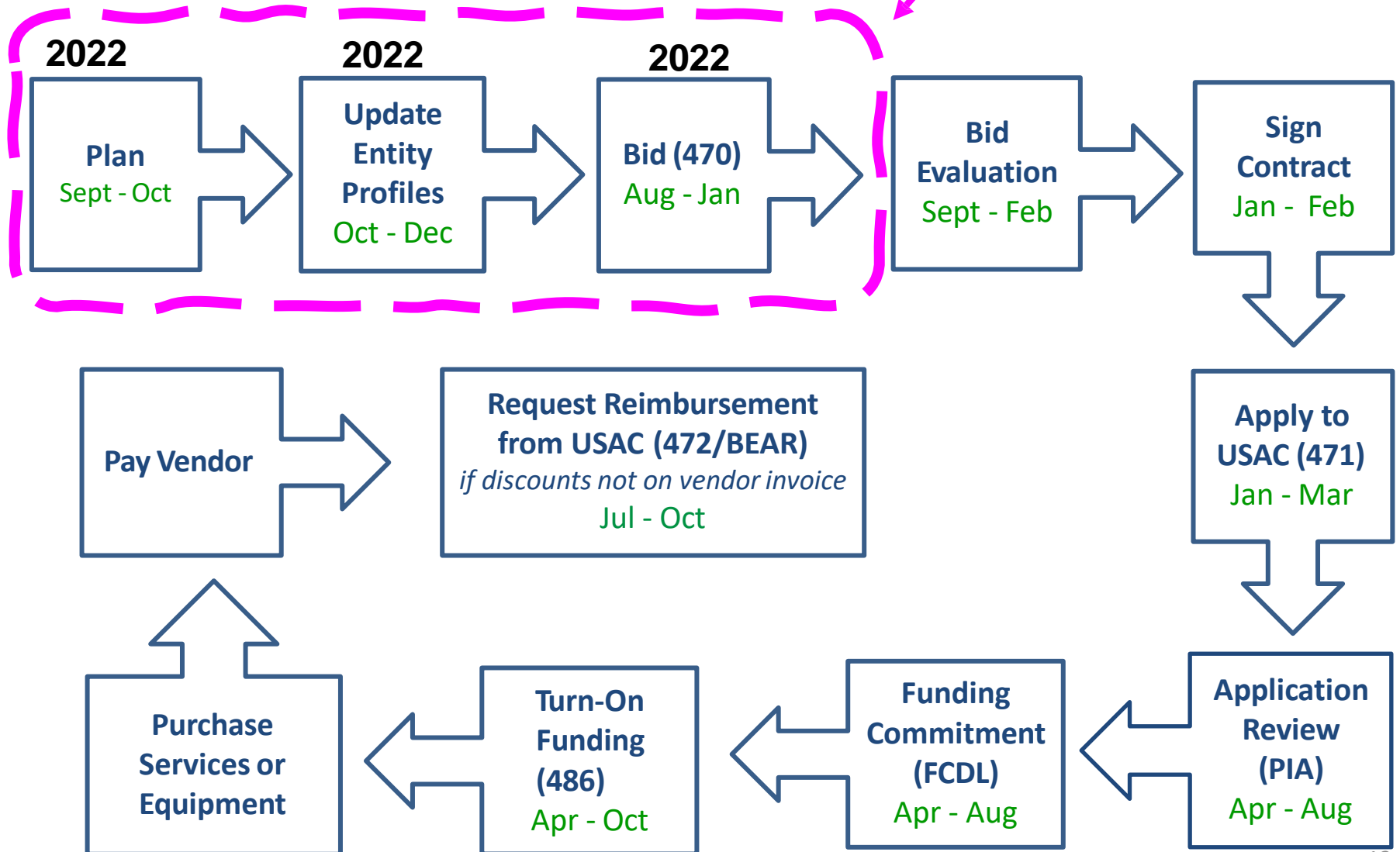- Certification examples available at: http://e-ratepa.org/?p=33555

CARBON CAREER AND TECHNICAL INSTITUTE
COLUMBIA-MONTOUR AVTS DISTRICT
DAUPHIN COUNTY AVTS DISTRICT
GREATER JOHNSTOWN CTC
LANCASTER COUNTY CAREER AND TECHNOLOGY CENTER
SUN AREA TECHNICAL INSTITUTE –W1/W2

Let's Shift to Funding Year 2022...

The E-rate Cycle

For FY 2022, we are here

2022

Plan
Sept - Oct

→

2022

Update Entity Profiles
Oct - Dec

→

2022

Bid (470)
Aug - Jan

→

Bid Evaluation
Sept - Feb

→

Sign Contract
Jan - Feb

↓

Apply to USAC (471)
Jan - Mar

↓

Application Review (PIA)
Apr - Aug

←

Funding Commitment (FCDL)
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←

Turn-On Funding (486)
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←

Purchase Services or Equipment

↑

Pay Vendor

→

Request Reimbursement from USAC (472/BEAR)
if discounts not on vendor invoice
Jul - Oct

FY 2022 "Admin Window"

- Admin Window is 3 months when schools and libraries update their school or library profiles in EPC portal
  - Admin Window cannot be open during Form 471 window and usually closes 2 days before Form 471 filing window opens in January
    - This data is then ported over into the Form 471
  - If you have no FY 2021 *pending* Form 471s, you can update your data now
  - **Discounts**: Update current enrollment/NSLP data to calculate E-rate discounts for upcoming year
  - **Category 2 Budgets**: Update enrollment (schools) if it will increase your Category 2 budget
    - C2 budget data not required to be updated each year
- Additional
  -- Category 2 enrollment data can be <u>different</u> from annual discount-rate enrollment data
      -- C2 enrollment data entered separately in EPC

Entering District-Wide Enrollment

- If you want to use enrollment that is different than the discount data, enter that information in EPC
  - Data will stay "stagnant" unless you update it (only update if enrollment increases)
- EPC Landing Page > District Name > Manage Organization > Scroll to bottom of 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.

Total Students for C2 Budget *

2500

FCC Registration Number ?

0123456789

CANCEL   SUBMIT

Category 2, 5-Year Funding Caps

- ➢ Current C2 budget cycle – Funding Years 2021 – 2025
    - ➢ All C2 budgets will reset in FY 2026 and no funding will be carried over
    - ➢ Single school budget is $167/student or $25,000, whichever amount is higher
- ➢ Budget multipliers will not increase with inflation during 5-year cycle
- ➢ C2 budgets are **pre-discount**
- – Applicants' E-rate discounts then apply

What is YOUR Remaining Category 2 Pre-Discount Budget?
- • List available at: http://e-ratepa.org/wp-content/uploads/2014/03/C2-Budgets-Remaining-as-of-10-20-2021.xlsx
    - • Will change if C2 enrollment is updated in EPC

Changes to C1 Form 470 for FY 2022

- FCC revamped Form 470 in attempt to remove "gotchas"

Add New Service Request

- ● I seek bids for internet access and/or data transmission service. ← Most common
- ○ I seek bids for Category One network equipment or maintenance and operations.

Both Internet AND data circuit *(use this especially for Internet and cable modem, DSL requests)*

- ★ I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

Commodity Internet only *(no circuit - rare)*

- ○ I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

- ★ I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

Data circuits only (WANs) or dark/lit fiber requests – No Internet *(common for districts and multi-site networks)*

- ○ I seek to build my own network.

Self-provisioned network *(build/own your own network - rare)*

Changes to C1 Form 470 for FY 2022

- 1st or 3rd Options have additional radial options:

○ I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

○ I seek bids for internet access without data transmission service and will arrange for separate data transmission service if required.

○ I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

○ I seek to build my own network.

❯ I seek bids for internet access and/or data transmission service.

❯ I seek bids for Internet access and data transmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/non-fiber hybrid networks, or non-fiber networks such as cable, DSL, copper, satellite, or microwave).

○ I seek bids for internet access and data transmission services, whether offered by one service provider(s) as a bundled package or offered by one or more service provider as independent services.

○ I seek bids for data plans or wireless adapters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have an existing broadband internal connections.

○ I seek bids for internet access and/or data transmission service.

○ I seek bids for Category One network equipment or maintenance and operations.

❯ I seek bids to purchase data transmission service only (i.e., that does not include internet access service).

○ I seek data transmission service without internet access service.

○ I seek to lease capacity, e.g., a specific number of dark fiber strands or capacity over a leased lit network, that will be used for data transmission service.

Typically, leased lit fiber or microwave *(most common)*

Leased dark fiber *(also includes leased lit fiber for comparison)*

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Changes to C2 Form 470 for FY 2022

- Welcome changes to C2 Form 470!
  - Basic maintenance an "add on" option to equipment request
  - Licenses/software included with equipment request

Use for equipment requests (most common)

Use if bidding maintenance ONLY *(uncommon)*

Use if bidding managed internal broadband services (MIBS) *(uncommon)*

Add New Service Request

☆ I seek bids for the equipment needed for broadband connectivity within schools and libraries and/or the related software and right-to-use licenses necessary for the equipment to function.

○ I seek bids for basic maintenance service on eligible equipment and/or support services (e.g., bug fixes, software upgrades, and security patches) appropriate to maintain reliable operation.

○ I seek bids for the operation, management, and monitoring of eligible broadband internal connections.

Service Type
Internal Connections

Function *
Routers and Necessary Software and Licenses ▾

Quantity *

Unit
Each

Manufacturer
No Preference ▾

Are you also seeking Installation, Activation and Initial Configuration for this service? *
○ Yes
○ No

☐ Please select this option if you would like to create an accompanying Category Two BMIC request for this IC request.

Awesome

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Do You Need to Rebid for FY 2022?

A Form 470 must be filed:

   1) If a service is covered on a Month-to-Month basis (meaning no contract exists – these are mostly cable modem-type services);

   2) At the <u>beginning</u> of any new contract
- If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2023, you are <u>not</u> required to file a Form 470 for FY 2022

   3) If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract

List of FRN Rebidding Status available at: http://e-ratepa.org/?p=33717

Contract Extension Reminder: If your current contract includes a specific # of voluntary extensions, and you want to exercise one of those extensions, you are not required to post a new Form 470 to use one of the extensions, but you **must** have written documentation to the vendor notifying them that you are electing to extend your contract, pursuant to one of the extension terms in your original contract.

Random Topics/Reminders

- FCC recently extended E-rate Gift Rule Waiver through June 30, 2022 due to COVID
- Don't forget that when posting a 470 without an RFP, always include a proposal due date (and it cannot be until at least 29 days after the 470 is posted)
- If you issue any changes or clarifications to your RFP (including posting answers to vendor questions), you must extend the bid due date by another 28 days
  - This is why it's best to start early
  - Build in a vendor question due date to your RFP timeline!

FY 2022 Application Timeline

- Recommended timeline:
  - NOVEMBER: File all Form 470s by Thanksgiving
  - DECEMBER: Vendor bids submitted
  - JANUARY: Bid evaluation, board agenda submission
  - FEBRUARY: School board approval, sign contracts
  - FEBRUARY/MARCH: File Form 471

- Form 470s being accepted in EPC NOW
  - Don't wait until January to file 470s

Where to Go For E-rate Help

- **E-rate: USAC's Client Service Bureau (CSB)**
  - E-rate "Help Desk" where applicant & service providers can get answers to questions
  - Call **888-203-8100**
  - Submit a 'Customer Service Case' in EPC

- **ECF: USAC's Customer Service Center (CSC)**
  - Call **800-234-9781**
  - Use "Contact Us" in EPC

- **PA E-rate Coordinator**
  - E-mail jtschell@comcast.net
  - Attend webinars!
  - Read listserve messages!
  - www.e-ratepa.org
    - Helpful Documents: http://e-ratepa.org/?page_id=754
    - Training: http://e-ratepa.org/?page_id=745
    - ECF Resources: http://e-ratepa.org/?page_id=32310

Questions?