

E-rate Training Workshop for Veteran PA Applicants

*...Let's wrap-up FY 2019, FY 2020 &
FY 2021, and prepare for FY 2022*



Presented by Julie Tritt Schell
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www.e-ratepa.org

Topics to Cover



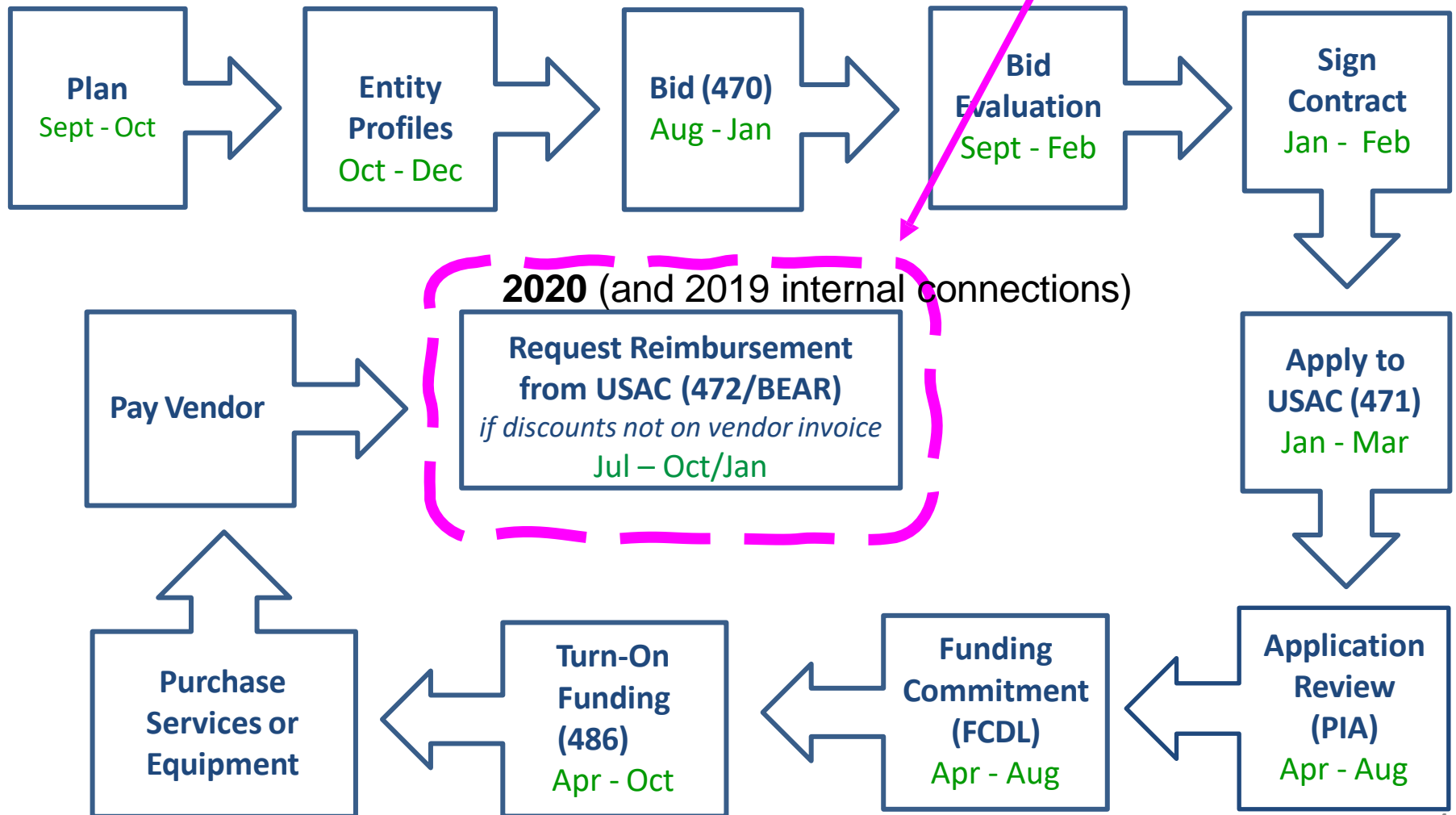
- Wrapping Up FY 2019, 2020, 2021
 - BEARs (Form 472 Reimbursement Form)
 - FY 2021 Form 486s Due
- ECF Update
- EPC School Profile Updates (known as the “Admin Window”)
- Category 2 Budgets and Where to Research Remaining C2 \$ for Your School/Library
- FY 2022 Anticipated Window Dates and Suggested Filing Timing
- Review of New Form 470 for FY 2022
- Which FRNs Need to Rebid for FY 2022
- etc...

...Finishing Funding Years 2019 & 2020



The E-rate Cycle

For FY 2020, we are here



BEAR Reimbursement Deadlines



- BEAR Form 472 – Form that must be submitted within 120 days of last date to receive service or equipment
- **For *recurring services* – FY 2020**
 - **October 28, 2021** is the invoicing deadline
 - Last date to receive service was June 30, 2021
 - Don't forget 2nd Form 471 C1 window
 - USAC may have added to original FRN, or adjusted service start date on new FRN (check SSD column)
 - C1 FRNs with imminent BEAR deadlines: <http://e-ratepa.org/?p=33683>
- **For *non-recurring purchases***
 - **FY 2020 - January 28, 2022** is the invoicing deadline
 - Last date to receive/install equipment was September 30, 2021
 - 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.

Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications for reimbursement and review notifications regarding their program activities.

Click here for BEAR Form

- If you log-in to One Portal and don't 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...

Requesting an Invoice Deadline Extension



- If you cannot make the BEAR deadline, OR if your BEAR was submitted but has not yet been paid, **file for an IDER**
- IDERs must be requested by the invoice deadline
- Extension will be approved automatically for a single, 120-day extension
 - Cannot request a second extension
 - Approvals are shown on the screen and also will be e-mailed

Important Note!! The IDER system is currently having some issues and cannot accept requests for multiple FRN extensions, despite what the system shows. You must request one IDER per FRN

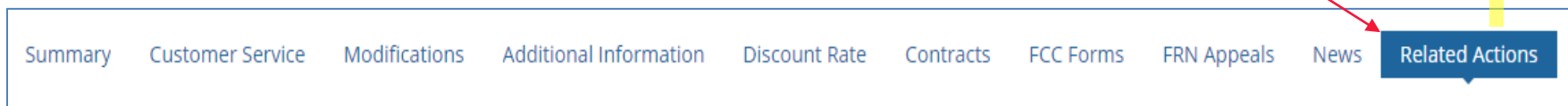


Finding the IDER Tool

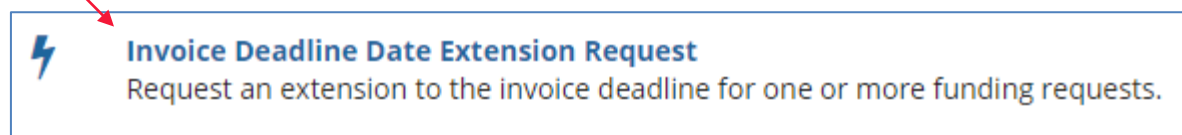
1) From your EPC Landing Page, click on your School or Library's Name under the USAC Logo



2) Select Related Actions from the top toolbar



3) Scroll to the bottom of the list, and select Invoice Deadline Extension Request



Enter FRN(s) to Check Eligibility

Request an extension: Invoice Deadline Date

Funding Request Number(s) for extension

List one or more funding request numbers (FRN) below to check its eligibility for an extension to the Invoice Deadline Date.

2099002212

Can only list a single FRNs here, despite what the system shows.

589/600 characters remaining

Note: Each FRN must be separated by a comma.

CANCEL

Click 'Check Eligibility'



CHECK ELIGIBILITY

Be Sure to Submit!

Funding Request Numbers Eligible for Extension

The funding request numbers listed below are eligible for an Invoice Deadline Date extension.

The request must still be submitted and approved by USAC before an extension can be granted. To edit your list of FRNs, use the Back button at the bottom of this screen.

<input type="checkbox"/>	Funding Request Number ↑	FRN Nickname	Current Service Delivery Deadline	Current Invoice Deadline Date	BEN	SPIN
<input type="checkbox"/>	2099002212	Cellular Voice - Verizon Wireless	6/30/2021	10/28/2021	125727	143000677

REMOVE

Funding Request Numbers Ineligible for Extension

The funding request number(s) listed below are not eligible for an Invoice Deadline Date extension. For more information, please review the Reason for Ineligibility.

Funding Request Number ↑	FRN Nickname	Reason for Ineligibility	Service Delivery Deadline	Invoice Deadline Date	BEN	SPIN
No items available						

Note: Only eligible FRNs will be submitted for an extension. To edit your list of FRNs, use the Back button below.

CANCEL

BACK

Assuming you are eligible to submit the IDER request, and the deadline has not yet passed, click SUBMIT to submit the request to USAC

SUBMIT

Approval Page

System will show new BEAR Invoice Deadline. Be sure not to miss this deadline because no further extensions can be requested.

Approved for an IDD extension

The funding request number(s) listed below have been approved for an extension to the Invoice Deadline Date.

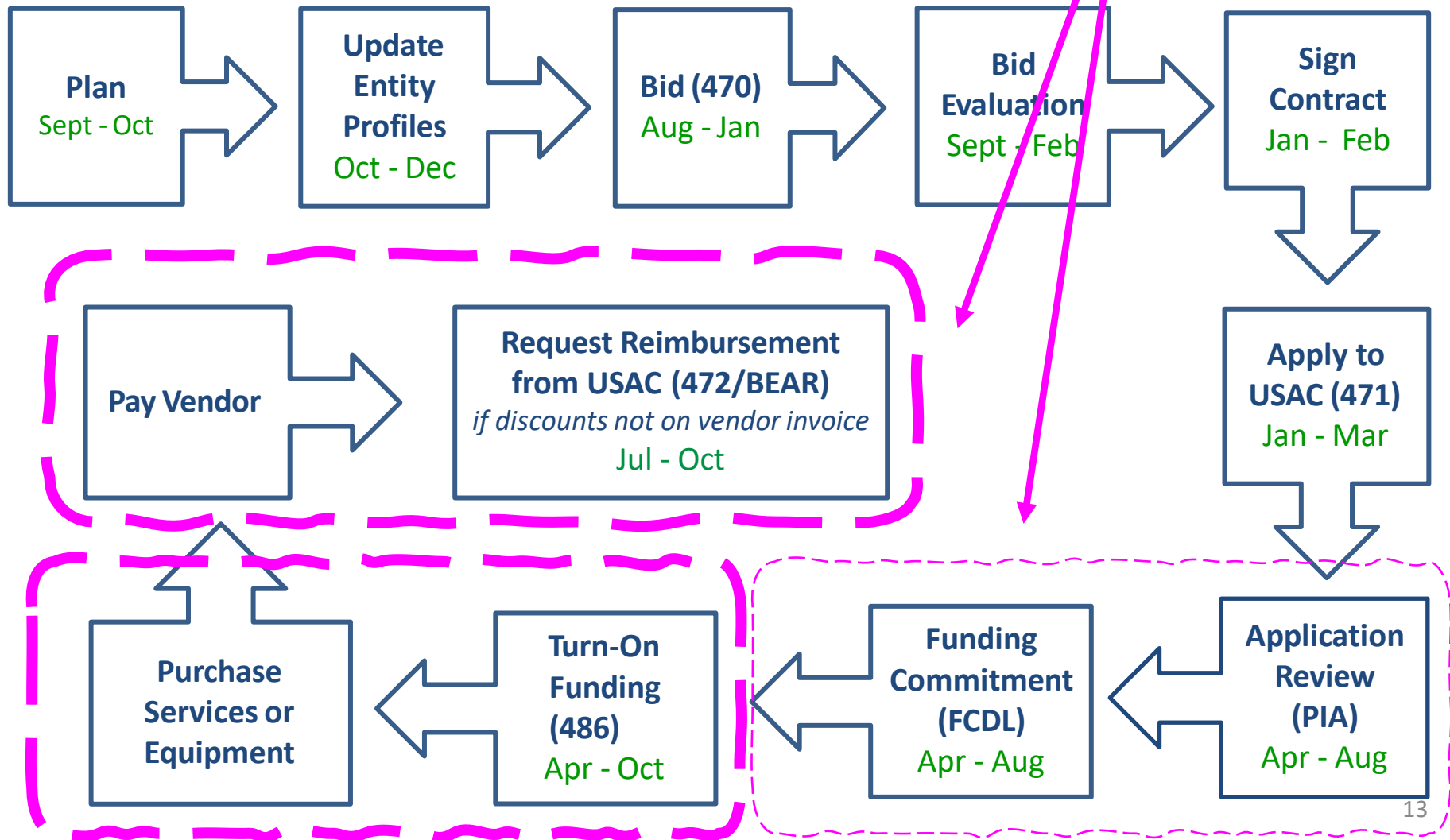
Funding Request Number	FRN Nickname	Service Delivery Deadline	Original Invoice Deadline Date	Extended Invoice Deadline Date	BEN	SPIN
2099002212	Comcast Communications, Inc.	6/30/2021	10/28/2021	1/28/2022	125727	143000677

Finishing FY 2021



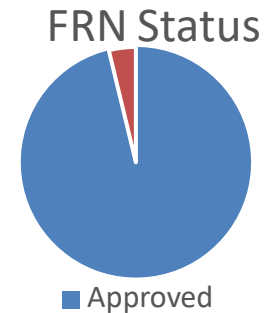
The E-rate Cycle

For FY 2021, we are here



Status of PA FY 2021 FCDLs

- 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



FY 2021 Sources of Confusion

- FY 2021 Denials:
 - Only 17 FRNs denied = < 1%
 - 10 used consultants
 - 2 charters, 5 districts, 1 IU, 2 libraries, 4 nonpublic schools, 1 CTC
 - Denial reasons:
 - 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
- If you have a question, please ask!



FY 2021 Form 486s

- If you have been funded for FY 2021, don't forget to file your Form 486 to "turn-on funding" and certify CIPA compliance
- Updated 486 Due List available at: <http://e-ratepa.org/wp-content/uploads/2014/03/FY2021-Form-486s-Due-as-of-10-20.xlsx>
 - For internal connections, file 486 now (don't wait)
- You must wait until you receive an FCDL to file the 486
 - Deadline is 120 days after FCDL date or October 28, whichever is later
- VERY easy form to file in EPC (no data entry)
 - Guide at: <http://e-ratepa.org/?p=33182>
 - Be careful when clicking on CIPA certifications
 - These toggle instead of staying checked!



Equipment Transfer & Labeling Rules

➤ Labeling

- When receiving equipment, be sure to label each piece and record in asset inventory
 - Asset inventory must be kept retained for 10 years from date of purchase

➤ Eligible Equipment Transfers

- Beginning July 1, 2021, all equipment (funded in any funding year) may be transferred between buildings
 - If equipment is transferred between buildings within 5 years from date of purchase, must record reason and date of transfer and update asset inventory
 - No notice to USAC is required
 - Equipment may be disposed of, sold, transferred, etc. from 5 years from the date of installation
 - No notice to USAC required but asset inventory must be updated



————→ After 5 years, transfer equipment to a NIF

Emergency Connectivity Fund (ECF) Update



ECF Update

Window 1: 317 applicants

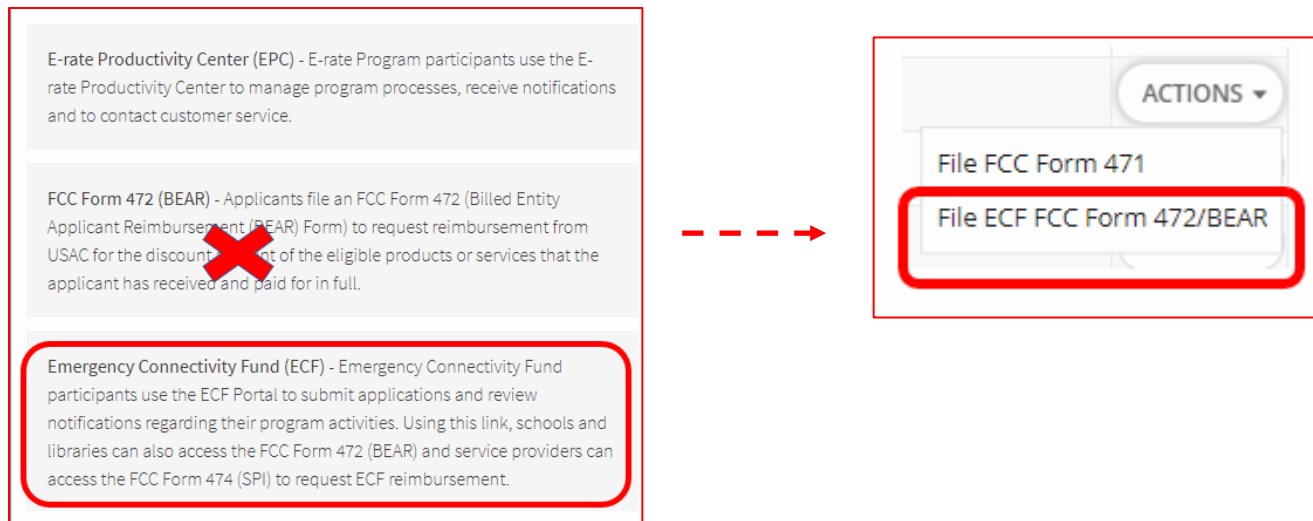
- Total Requested: \$99,748,595.39
 - Equipment: \$62,970,850
 - # Laptops/Tablets Requested: 200,851
 - # Wi-Fi Hotspots (equipment) Requested: 22,993
 - Services: \$36,777,744
 - # Mobile Broadband Service Plans Requested: 65,189
 - Network Buildout to Unserved Homes
 - \$18,878,447
 - Requested by 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/library patrons
- Certification examples available at: <http://e-ratepa.org/?p=33555>

ECF BEARs

- ECF System now accepting ECF BEAR Reimbursement Forms
 - Filing Guide available at: <http://e-ratepa.org/?p=33655>



- **STEPS:**
 - After BEAR is submitted, USAC will review vendor invoice with 471 application
 - After approval, all EPC Users will receive BEAR approval e-mail
 - Batch then sent to FCC for approval, then to Treasury
 - Treasury will send notification to SAM.gov contact when \$ is transferred
- DUNS # in SAM.gov and DUNS # in FCCRN system (CORES) must match
 - If they don't, USAC will reach out to ask for your DUNS #
 - **Be sure to give them the DUNS # that's in your SAM.gov account**

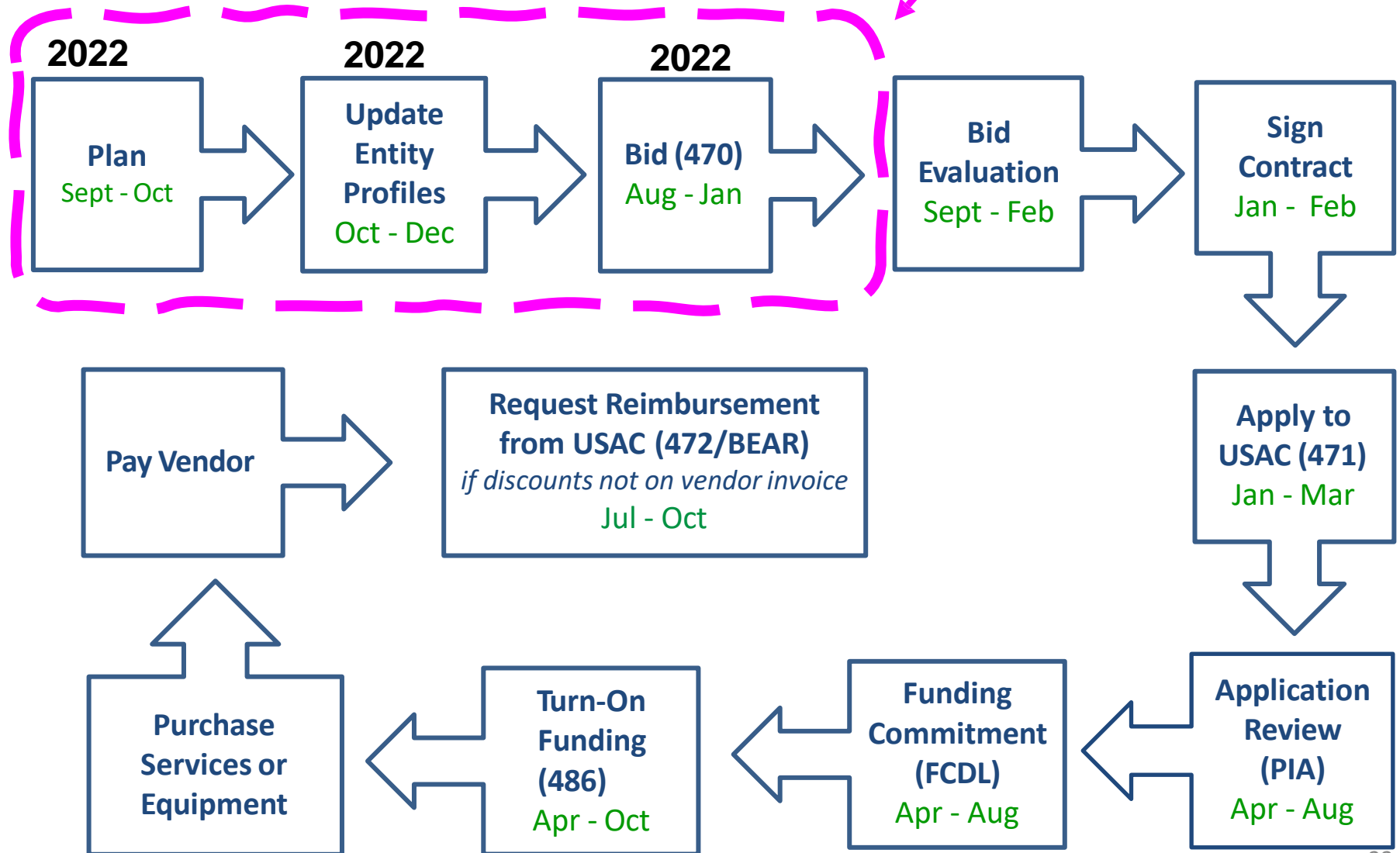


*Let's Shift to
Funding Year 2022...*



The E-rate Cycle

For FY 2022, we are here



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) and square footage changes (libraries) if it will increase Category 2 budgets
 - C2 budget data not required to be updated each year
 - **Admin Window dates have not yet been announced**
- USDA has extended the Seamless Summer Option (SSO) to all schools for the 2021 school year, which is again providing free meals to all students, regardless of income
 - Requested affirmative guidance from the FCC that schools may again use their Fall 2019 enrollment and NSLP data as the basis of their E-rate discount calculations for E-rate FY 2022
 - Can use more recent data if it is more advantageous to your discount or C2 budgets



FY 2022 “Admin Window” - More

- Additional
 - Category 2 enrollment data can be different from annual discount-rate enrollment data
 - C2 enrollment data entered separately in EPC (see next)
- **Do the calculations!**
 - Only update your discount data if your NSLP eligibility has increased over last year (*which is FY 2020 because of COVID relief*)
 - Only update Category 2 data if applying for C2 funding in FY 2022 and your enrollment has increased since FY 2021 (*which is FY 2020 because of COVID relief*)



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 calculate your Category Two student count from year to year within a Category Two budget cycle, so 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

District Student Count *

Sum of Student Counts of all Schools in the District

1605

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?	
16906	JOE WALKER ELEMENTARY SCHOOL	219	N/A	✓	UPDATE
16932	CLAYSVILLE ELEMENTARY SCHOOL	531	N/A	✓	EDIT
16936	MCGUFFEY MIDDLE SCHOOL	374	N/A	✓	EDIT

Note: For small school districts, the system won't calculate using the hybrid method if you enter a single number for the whole district.

Adjusting these will NOT update your enrollment used for your discount rate.

Single-Schools

- Or, if you are a single school that is not part of a district, your C2 enrollment screen would look like this:

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 *

FCC Registration Number ⓘ

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
- Budget multipliers will not increase with inflation during 5-year cycle
- C2 budgets are **pre-discount**
 - Applicants' E-rate discounts then apply

C2 budget multipliers:

Single Schools:

\$167 x total enrollment OR \$25,000, whichever total budget is greater

School Districts:

\$167 x total district enrollment, OR

\$25,000 x total number of schools in the district

– Whichever total budget is greater

Independent Libraries:

\$4.50 x total square footage OR \$25,000, whichever total budget is greater

Library Systems:

\$4.50 x total square feet of all library branches OR \$25,000, whichever total budget is greater

- Hybrid budget option for school districts/library systems with less than 10 schools or branches

Category 2 Pre-Discount Budget

5-Year C2 Budget Cap*	E-rate Discount	E-rate Will Pay:	District's Share %	District Must Pay:
\$204,475	60%	\$122,685	40%	\$81,790

* The C2 Budget Cap is the **pre-discount price**. E-rate discounts will then apply **on top of** the budget cap. In this example, district would still owe their 40% non-discounted share

- Future funding years: To determine what “**remains**” in a C2 budget for future years in the C2 “cycle”, take the 5-Year Budget Cap and subtract the pre-discount amounts of what has been “committed” in the previous year(s) of the C2 cycle

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
- Download real-time data at: <https://opendata.usac.org/E-rate/E-rate-C2-Budget-Tool-FY2021-/8z69-hkn7>
 - Enter BEN to filter just your entity's data

Filters (1)
Clear All

State
Select...

Applicant type
Select...

City
Select...

Billed Entity Name
Select...

BEN
125246

Consulting Firm Name (CRN) 28
Select...



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

Most common

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.

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

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

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

☐ I seek to build my own network.



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)

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.

Awsome

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 beginning 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 not 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.

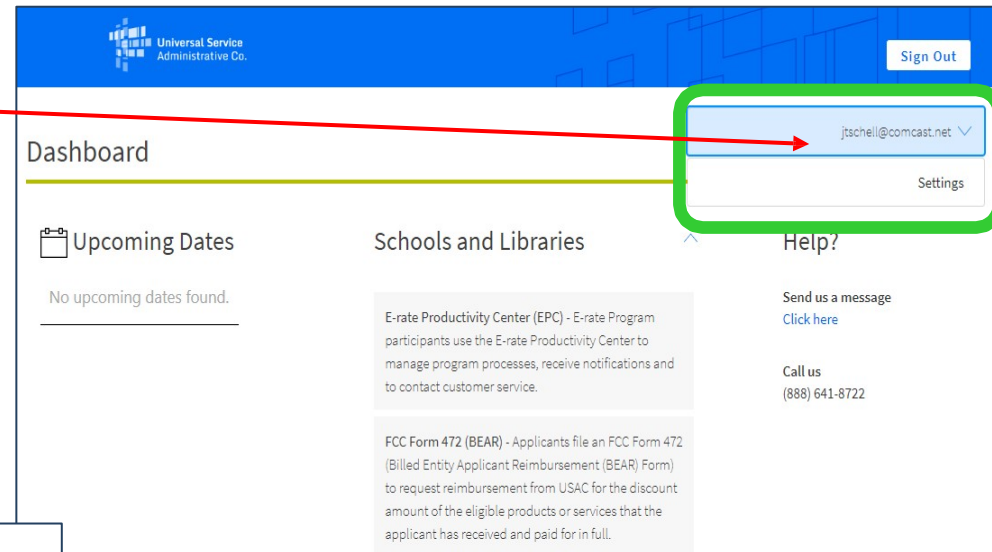
Random Topics/Reminders

- FCC recently extended E-rate Gift Rule Waiver through June 30, 2022 due to COVID
- For FY 2022, USAC will continue to utilize the 2010 Census urban/rural determinations
- 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!**
- If you are logging into One Portal (EPC) and don't have the option to validate using a text message: follow these steps...



Adding Text MFA Option

If you see the Dashboard, click your **Username (email address)** in the top right corner of Dashboard, then **Settings** to change your profile/settings, including adding text authentication.



Make Your Selection

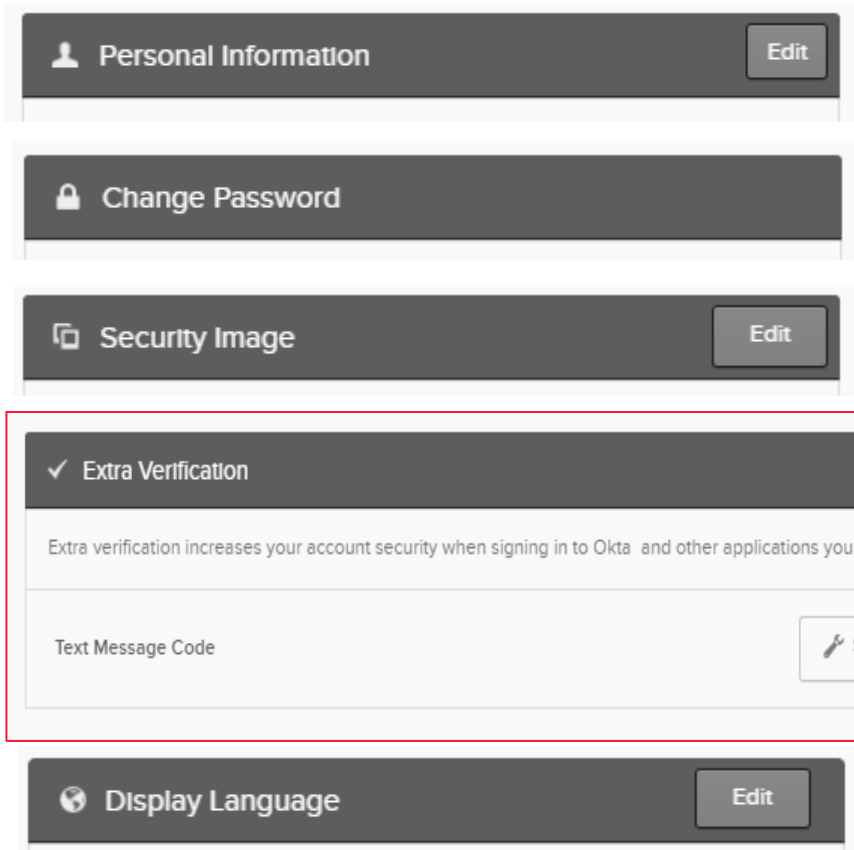
- Select **Continue** to go to your program's system.
- Select **Manage My Authentication Settings** to update either your email address or phone number to access your account.

[Manage My Authentication Settings](#)

Continue

*If you just see this screen, click **Manage My Authentication Settings** to change your profile/settings, including adding text authentication.*

Updating Settings/Profile



The screenshot displays a vertical list of settings cards. The first card is 'Personal Information' with an 'Edit' button. The second is 'Change Password'. The third is 'Security Image' with an 'Edit' button. The fourth card, 'Extra Verification', is highlighted with a red border and contains a checkmark icon, a description, and a 'Text Message Code' section with a 'Setup' button. The final card is 'Display Language' with an 'Edit' button.

Personal Information [Edit](#)

Change Password

Security Image [Edit](#)

✓ Extra Verification

Extra verification increases your account security when signing in to Okta and other applications you use.

Text Message Code [Setup](#)

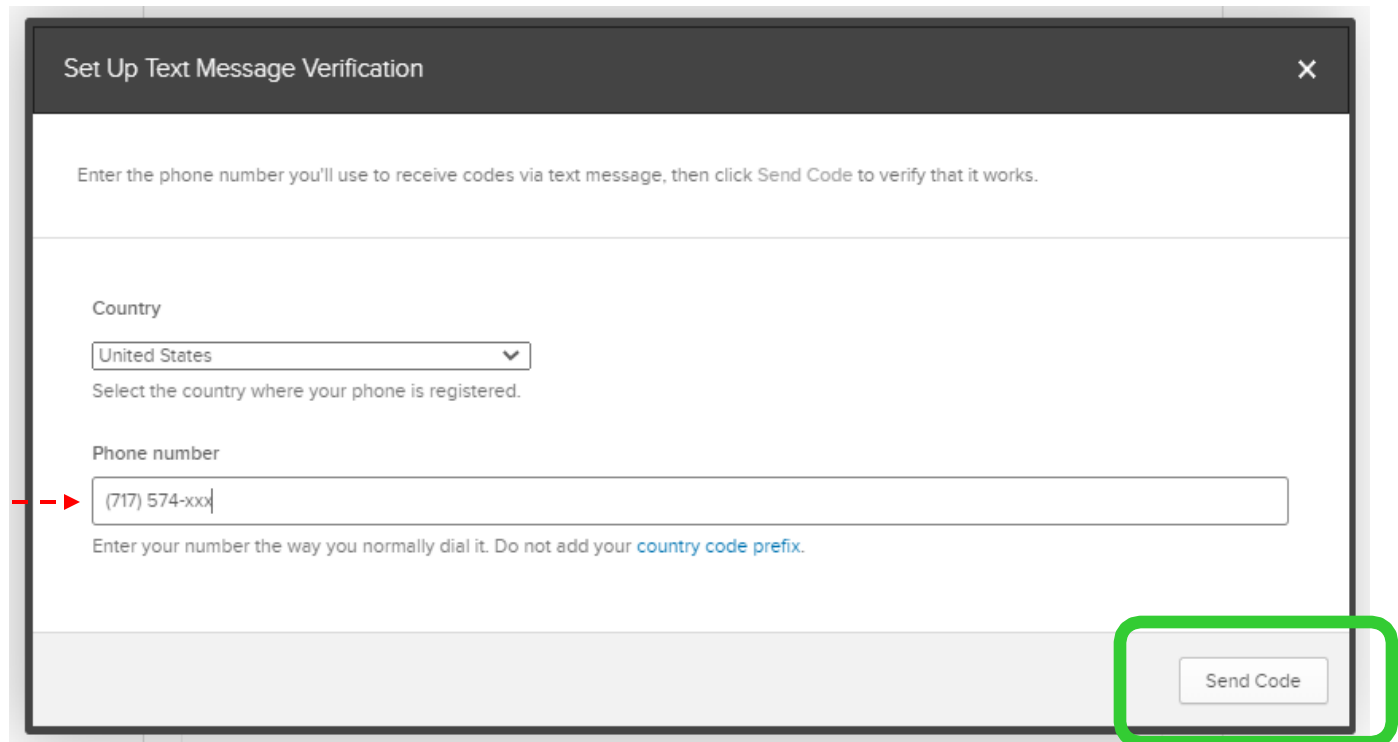
Display Language [Edit](#)

On this page, you can add or modify any of these items.

To add the option of receiving verification codes via text to your cell phone, click on **Extra Verification**, then **Setup**.

Adding Text MFA Option

Enter your cell phone number, then click **Send Code**. A validation code will immediately be sent via text.



Set Up Text Message Verification [X]

Enter the phone number you'll use to receive codes via text message, then click Send Code to verify that it works.

Country
United States ▼
Select the country where your phone is registered.

Phone number
(717) 574-xxx|
Enter your number the way you normally dial it. Do not add your [country code prefix](#).

Send Code

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



FY 2022 Questions to Ask Yourself

- Is a Form 470 Needed for FY 2022?
 - **Category 1:** Review existing contracts to determine when they expire
 - Extend, if desired and if options available
 - If contract expiring, decide if additional bandwidth is needed
 - Review Julie's Category 1 bidding list
 - **Category 2:** Determine what equipment/wiring is needed for each school over next 12 months
 - Research options, prepare bid-list
- If bidding is needed, what will be my bidding dates?
- What date(s) will I obtain board approval?
 - What is the deadline to add items to the board agenda?
 - Be sure board meeting date is before Form 471 due date which is likely to be mid-March
- When will I file the Form 471?
 - The earlier you file the sooner you're likely to be funded!
- Will I update enrollment/NSLP for FY 2022 or use last year's data?

Create a detailed timeline, mark it on your calendar, and follow your plan!

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?

