

# Creating PEPPM-Based Contract Records in EPC - FY 2017

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Julie Tritt Schell  
PA E-rate Coordinator  
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# PEPPM-Based Contracts

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- The biggest differences between a 470-based Contract Record and a PEPPM-based Contract Record are:
  - Use all information from the LOCAL contract signed with the vendor, resulting from your PEPPM mini-bid, EXCEPT use the PEPPM 470 # - 245730001240230
    - Use # of bids from your PEPPM Mini-Bid
    - Use signing date of PEPPM mini-bid-based contract
  - Answer a few questions differently
    - State Master Contract, Multi-Award Contract, & Piggyback questions
- In general, a new CR will be created for every new PEPPM-based contract signed with a vendor
- Upload a copy of the District's contract with the vendor
- Look for this symbol on the following pages to indentify where PEPPM-related information must be listed

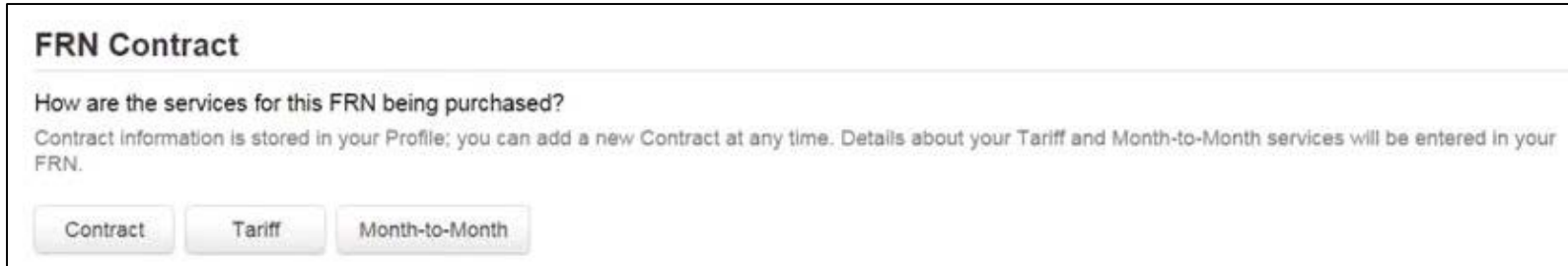


~ PEPPM ~

# Purpose of Contracts Module

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- During the creation of a Form 471, each FRN requires you to indicate how you will be purchasing the requested services – either via a contract, tariff or Month-to-Month (MTM):



The screenshot shows a web interface titled "FRN Contract". Below the title is a question: "How are the services for this FRN being purchased?". A sub-note reads: "Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN." At the bottom, there are three buttons: "Contract", "Tariff", and "Month-to-Month".

- Instead of entering the bidding/contract information as part of the Form 471 application, this information is entered in EPC as a Contract Record (CR)
  - A single Contract Record is created each time a new contract is signed
  - That CR is then referenced to the applicable FRN
- Create Contract Records in the Contracts Module before starting the Form 471
- No information should be entered in contracts module for MTM FRNs

# When to/Not to Create a New Contract Record

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## When TO Create a New CR

- Newly signed contracts
  - Create a new Contract Record each time you sign a new contract
  - Do not create a CR for each year of the contract
- Errors on previously-submitted Contract Records
  - If you notice that any data in your Contract Record from last year is inaccurate (such as the 470 #, SPIN #, etc), create a new CR and reference the accurate CR on your FRN (ignoring the old one)
  - There is no way to edit an existing CR after it's been submitted
    - Likewise, there's no way to delete a submitted CR (it will just die on the vine)

## When NOT to Create a New CR

- If you created a Contract Record last year that contained voluntary extensions, and you wish to exercise one of those extensions for FY 2017, do not create a new CR
- Simply change the Contract Expiration Date in the FRN when you create your Form 471

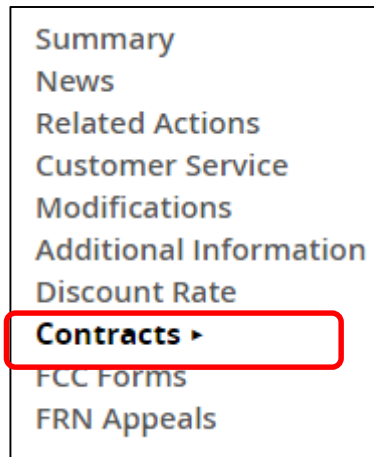
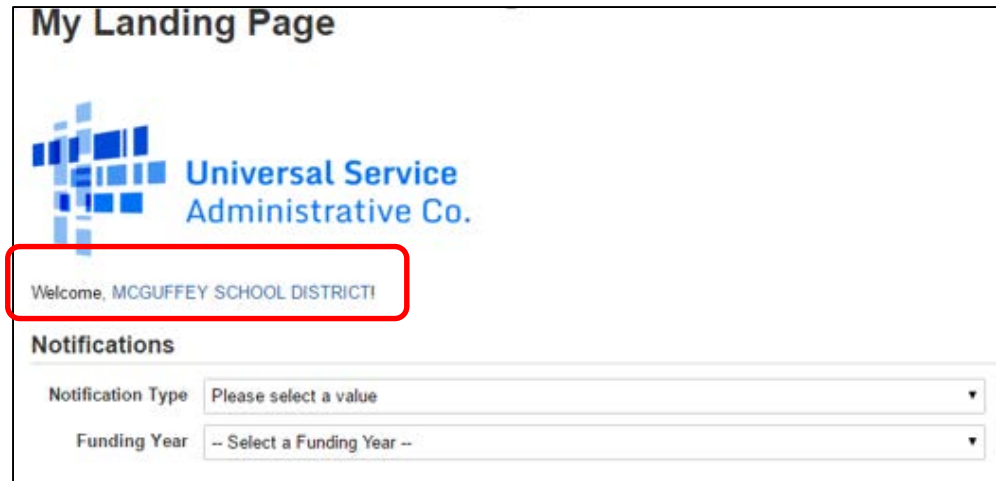
# Contract Records – Additional Details

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- **Uploading Actual Contracts in CR**
  - Although the system asks if you want to upload a copy of your signed contract into EPC, you aren't required to do so
  - However, I highly recommend that you upload copies of all signed Category 2 contracts as PIA routinely asked for them last year if they weren't part of your CR.
- **Contract Expiration Dates**
  - The Contract Module doesn't ask for the Contract Expiration Date (CED) -- this data element must be entered in each funding request within the Form 471 itself
  - Why? Because due to voluntary extensions in some contracts, it's possible that the CED can change from year to year
- **PEPPM Mini-Bid-Based Contracts**
  - Except for the PEPPM Form 470 #, you will rely entirely on the contract information that your district signed with the vendor.
- **Be Prepared**
  - It's a good idea to have the information in-hand. Use the CR Data spreadsheet to compile the required data prior to starting the Contract Module

# Where Is the Contract Module?

- From the EPC Landing Page, click on the name of your school district or library name (the parent)
- Then click on Contracts on the left toolbar



# Navigation to “Manage Contracts”

Click on the “Manage Contracts” button



- Summary
- News
- Related Actions
- Customer Service
- Additional Information
- Discount Rate
- Contracts ▶**
- FCC Forms

Records / Applicant Entities

**#116 - School District 6** [Follow](#)

Manage Contracts

## Submitted Contracts

There are no submitted contracts for this organization.

## Manage Contracts

### Contracts - School District 6 (BEN: 116)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

#### My Contract Drafts

You have no contract drafts for this organization. Click the Add a New Contract button to create a new contract.

Click on the “Add a New Contract” button

Add a New Contract

Edit

Delete

# Contract Information

## Create Contract

School District 6 (BEN: 116) - - Contract ID #

Progress bar: Contract Information (active), Establishing FCC Form 470, Service Provider, Contract Dates, Pricing Confidentiality, Confirmation

Here you will enter preliminary information about this contract, including a descriptive nickname to help you identify it later.

### Contract Information

Enter a nickname to easily identify this contract ?\*

Contract Number ?

Buttons: Cancel, Save & Close, Save & Continue

A descriptive nickname of contract will help you identify it later. Hint: Use a really good nickname! For example: “Year contract signed – Vendor Name - service/equipment type”

2017 – ABC Vendor - Switches

Enter contract number, N/A or leave blank. This is optional

Then Save and Continue.



# Contract Uploads

EPC allows you to, but does not require you, to upload a copy of your contract.

## Create Contract

### School District 6 (BEN: 116) - FY2016 Internet Contract - Contract ID #1

Last Saved: 2/2/2016 2:28 PM EST

Contract Information

Establishing FCC  
Form 470

Service Provider

Contract Dates

Pricing  
Confidentiality

Confirmation

Here you will have the option to upload contract documents, including a description of each document.

### Contract Information

Contract ID #1 ?

A number is assigned by the system.

Would you like to upload a copy of your contract? ?

Yes

No

Select **Yes** and upload a copy of your PEPPM-based contract. The system will prompt you to upload the electronic file from your computer.

Back

Cancel

Save & Close

Save & Continue

# Contract Uploads

## Create Contract

### School District 6 (BEN: 116) - FY2016 Internet Contract - Contract ID #1

Last Saved: 2/2/2016 2:28 PM EST

Progress bar with steps: Contract Information, Establishing FCC Form 470, Service Provider, Contract Dates, Pricing Confidentiality, Confirmation.

Here you will have the option to upload contract documents, including a description of each document.

### Contract Information

Contract ID #1

Would you like to upload a copy of your contract?

Buttons: Yes ✓, No

### Contract Document Upload

Please upload and describe each document related to your contract.

FY2016 Internet Contract.docx (12.27 KB) ×

Browse... No file selected.

Describe this contract document.

Text input field for document description.

Describe this contract document.

Text input field for document description.

A description may be added for each uploaded contract document.

Multiple documents related to the same contract may be uploaded.

Buttons: Back, Cancel

# Contract Information - PEPPM



Here you will answer additional questions about this contract.



## Contract Information

Is this contract based on a State Master Contract? ?

Yes ✓  No



Based on a State Master Contract? Answer Yes if this is a contract resulting from a PEPPM Mini-Bid procurement.

Is this contract based on a multiple award schedule? ?

Yes ✓  No



Based on a Multiple Award Schedule? Answer Yes if this is a contract resulting from a PEPPM Mini-Bid procurement.

# Contract Information



Here you will answer additional questions about this contract.

~ PEPPM ~

## Contract Information

Can other applicants piggy back off this contract?



Can other applicants piggyback off your contract?  
Answer No if this is a contract resulting from a PEPPM mini-bid procurement.

Was this contract originally created by another applicant, and you then piggy backed off their contract?



Did YOU piggy back off another applicant's contract?  
Answer No if this is a contract resulting from a PEPPM mini-bid procurement.

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# Establishing Form 470/# Bids

Contract Information

Establishing FCC  
Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you can use the search tool below to associate an FCC Form 470 with this contract.

## Establishing FCC Form 470

Was an FCC Form 470 posted for the product and/or services you are requesting?

Yes

No

How many bids were received? ? \*

Enter the number of bids that you received for this product or service.

Click on the "Yes" button to indicate a 470 was posted.

Enter the number of bids received during your PEPPM Mini-Bid procurement. It's important that you get this right in case you are ever asked during PIA or in an audit to supply the winning and losing bids.

~ PEPPM ~

# PEPPM 470 #

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you can use the search tool below to associate an FCC Form 470 with this contract.

## Establishing FCC Form 470

Was an FCC Form 470 posted for the product and/or services you are requesting?

Yes ✓

No

Was your FCC Form 470 posted prior to Funding Year 2016?

Yes ✓

No

Answer YES – the PEPPM 470 was posted prior to FY 2016

How many bids were received? ? \*

Enter the number of bids that you received for this product or service.

FCC Form 470 Number ? \*

245730001240230

determine if this FCC Form 470 is valid. Please check the number carefully before continuing.

Enter the PEPPM Form 470 Number. Check this number carefully for accuracy.

Back

Cancel

~ PEPPM ~

~ PEPPM ~

Save & Close

Save & Continue

# Service Provider Information

Contract Information    Establishing FCC Form 470    **Service Provider**    Contract Dates    Pricing Confidentiality    Confirmation

Here you will associate the service provider listed on the contract.

**Service Provider**

Account Number (e.g., billed telephone number)

If your service provider has given you one or more Account Numbers, please enter them.

Please select the service provider for this contract using the search below.

**Search Service Providers**

Search by SPIN

Search by Name (Full or Partial)

Enter account number if you have one.  
Optional field that may be left blank.

Enter the SPIN or Name of the Service Provider and then Search.

# Service Provider Information

Contract Information   Establishing FCC Form 470   **Service Provider**   Contract Dates   Pricing Confidentiality   Confirmation

Here you will associate the service provider listed on the contract.

### Service Provider

Account Number (e.g., billed telephone number)

If your service provider has given you one or more Account Numbers, please enter them.

Please select the service provider for this contract using the search below.

### Search Service Providers

Search by SPIN   Search by Name (Full or Partial)

Results matching the criteria you used will appear in a list. Select correct SPIN or clear filter and search again.

Clear Filters   Search

<input type="checkbox"/>	SPIN	Name	Doing Business As	State
<input type="checkbox"/>	14010001	USAC Service Provider Organization 1		VA
<input type="checkbox"/>	14010002	USAC Service Provider Organization 2		VA
<input type="checkbox"/>	14010003	USAC Service Provider Organization 3		VA
<input type="checkbox"/>	14020001	FCC Service Provider Organization 1		VA
<input type="checkbox"/>	14020002	FCC Service Provider Organization 2		VA

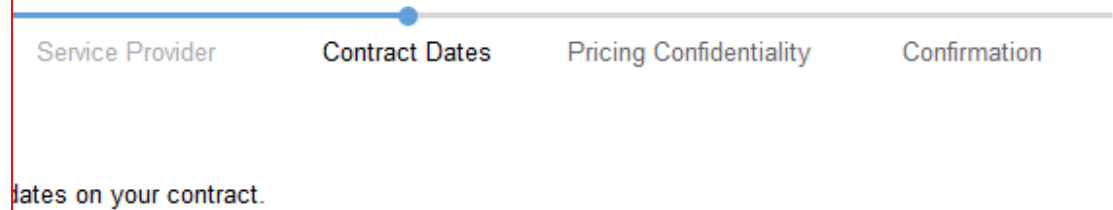
1-5 of 9

Back   Cancel   Save & Close   Save & Continue



# Contract Award Date

Generally, PEPPM-related contracts are not multi-year contracts unless they are for maintenance.



## Contract Dates

Is this a multi-year contract?

What is the date you awarded your contract? \*

The Contract Expiration Date will be entered in each FRN where you cite this contract.

Enter Contract Award Date:

*This is the date that you signed your vendor contract after conducting your PEPPM mini-bid procurement.*

# Contract Extensions

Generally, PEPPM-related contracts will NOT have voluntary extensions.

The screenshot shows a multi-step process for setting up a contract. A progress bar at the top has four stages: 'Contract Information', 'Establishing FCC Form 470', 'Service Provider', and 'Contract Dates'. The 'Contract Dates' stage is currently active, indicated by a blue dot and a blue line. Below the progress bar, the text reads: 'Here you will answer additional questions about voluntary extensions on your contract'. The section is titled 'Contract Dates' and contains the question: 'Does this contract include voluntary extensions?'. There are two buttons: 'Yes' (grey) and 'No ✓' (green). A red arrow points from the text box above to the 'No ✓' button. To the right of the question, there is a yellow oval with a green border containing the text '~ PEPPM ~'.

# Pricing Confidentiality

Always select “No” to indicate there is no legal restriction to prevent the publication of the pricing information for the contract.

Contract Information    Establishing FCC Form 470    Service Provider    Contract Dates    **Pricing Confidentiality**    Confirmation

Here you will answer additional questions about applicable publication restrictions on this contract.

## Pricing Confidentiality

Is there a statute, rule, or other restriction which prohibits publication of the specific pricing information for this contract?

# Confirmation Page

A summary page with the contract information will be displayed.

If the information needs to be revised, select “Save and Close” and you can then retrieve the draft information and edit it.

If the information is correct, and you want to finalize the submission, select “Complete.”

*Words of Caution: Once submitted, the information cannot be deleted or revised.*

## Create Contract: Confirmation

School District 6 (BEN: 116) - FY2016 Internet Contract - Contract ID #1

Last Saved: 2/3/2016 9:59 AM EST

Contract Information    Establishing FCC Form 470    Service Provider    Contract Dates    Pricing Confidentiality    **Confirmation**

Please review the information and submit the information below to complete this contract.

### Contract Information

Nickname	FY2016 Internet Contract	Contract ID	1
Can Other Applicants Piggy Back Off This Contract?	No	Contract Number	
Piggy Backed Off Another Contract?	No	Based on a State Master Contract?	No
		Based on a Multiple Award Schedule?	No

### Establishing FCC Form 470

Establishing FCC Form 470	#160000151	Number of Bids Received	1
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### Service Provider

Service Provider	USAC Service Provider Organization 1 (SPIN: 14010001)	Account Number	
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### Contract Dates

Award Date	2/1/2016	Multi-Year Contract?	No
Includes Voluntary Extensions?	No		

### Pricing Confidentiality

There is no rule, statute, or other restriction which prohibits publication of the specific pricing information for this contract.

### Supporting Documents

Document	Description
FY2016 Internet Contract	

Back

Cancel

Save & Close

Complete

# List of Submitted Contract Records



- Summary
- News
- Related Actions
- Customer Service
- Additional Information**
- Discount Rate
- Contracts >**
- FCC Forms

Records / Applicant Entities

## #116 - School District 6

Follow

Manage Contracts

### Submitted Contracts

Contract ID	Contract Number	Contract Nickname	Award Date	
1		FY2016 Internet Contract	2/1/2016	<a href="#">View</a>

*Submitted contracts appear in the Contracts Module list and can be referenced when filing a Form 471.*

# Editing or Deleting Draft Contract

From your Landing Page, select “Contract” and then select “Manage Contracts.” The list of draft contracts will appear. Check the box for the draft and select “Edit” or “Delete.” Note: Submitted contracts cannot be edited or deleted.

## Manage Contracts

### Contracts - School District 6 (BEN: 116)

Use the dropdown to select the type of contract you would like to edit or remove. Click the Add a New Contract button at any time to create a new contract for your organization.

Contract Type

#### My Contract Drafts

The grid below contains all of your draft contracts created for this organization.

- To edit a draft contract, select 1 contract from the grid and click the Edit button at the bottom of the form.
- To delete a draft contract, select up to 5 contracts from the grid and click the Delete button at the bottom of the form.

<input checked="" type="checkbox"/>	Contract ID ↓	Contract Number	Contract Nickname	Created	Last Modified
<input checked="" type="checkbox"/>	3		FY2016 Phone Contract	2/3/2016 10:10 AM EST	2/3/2016 10:19 AM EST

Close

Add a New Contract

Edit

Delete