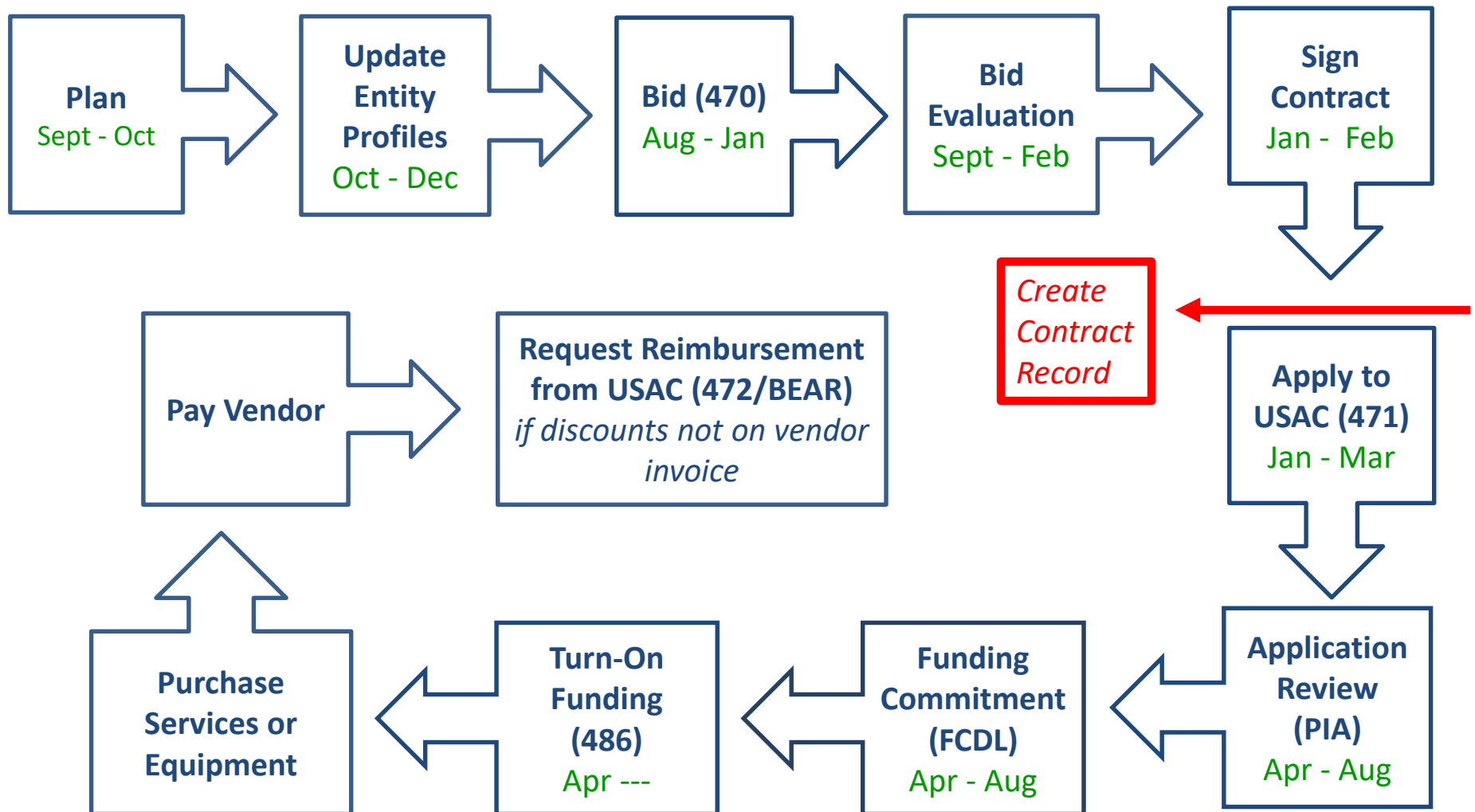


Creating Contract Records in EPC



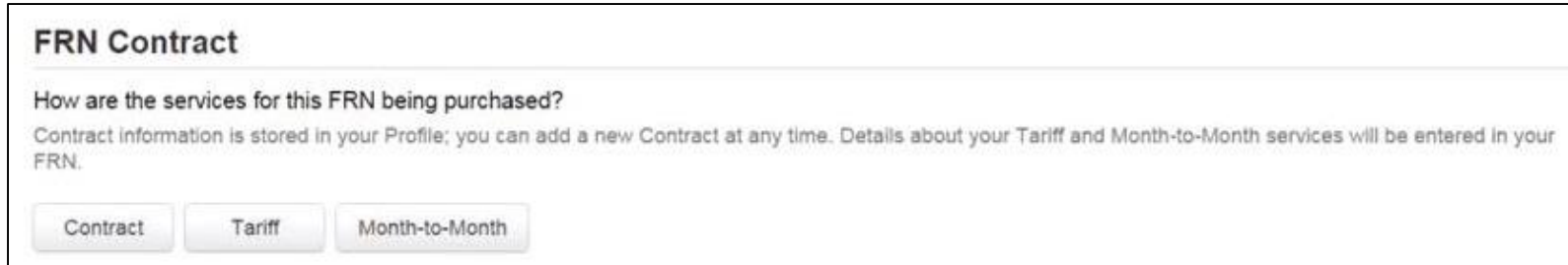
Presented by Julie Tritt Schell
PA E-rate Coordinator
for the Pennsylvania Department of Education
February 2020

You are **here** in the E-rate process:



Purpose of Contracts Module

- 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 Contract Record 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 the Contracts Module for MTM FRNs

When to/Not to Create a New Contract Record

When TO Create a New Contract Record

- 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 #, voluntary extensions, etc), create a new CR and reference the accurate Contract Record on your FRN (ignoring the old one)
 - There is no way to edit an existing Contract Record 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 Contract Record

- If you created a Contract Record in a previous year for a multi-year contract, do not create a new one. Just reference the original Contract Record when creating your 471
- If your previous Contract Record contained voluntary extensions, and you wish to exercise one of those extensions for FY 2020, do not create a new CR
 - Simply change the Contract Expiration Date in the FRN when you create your Form 471

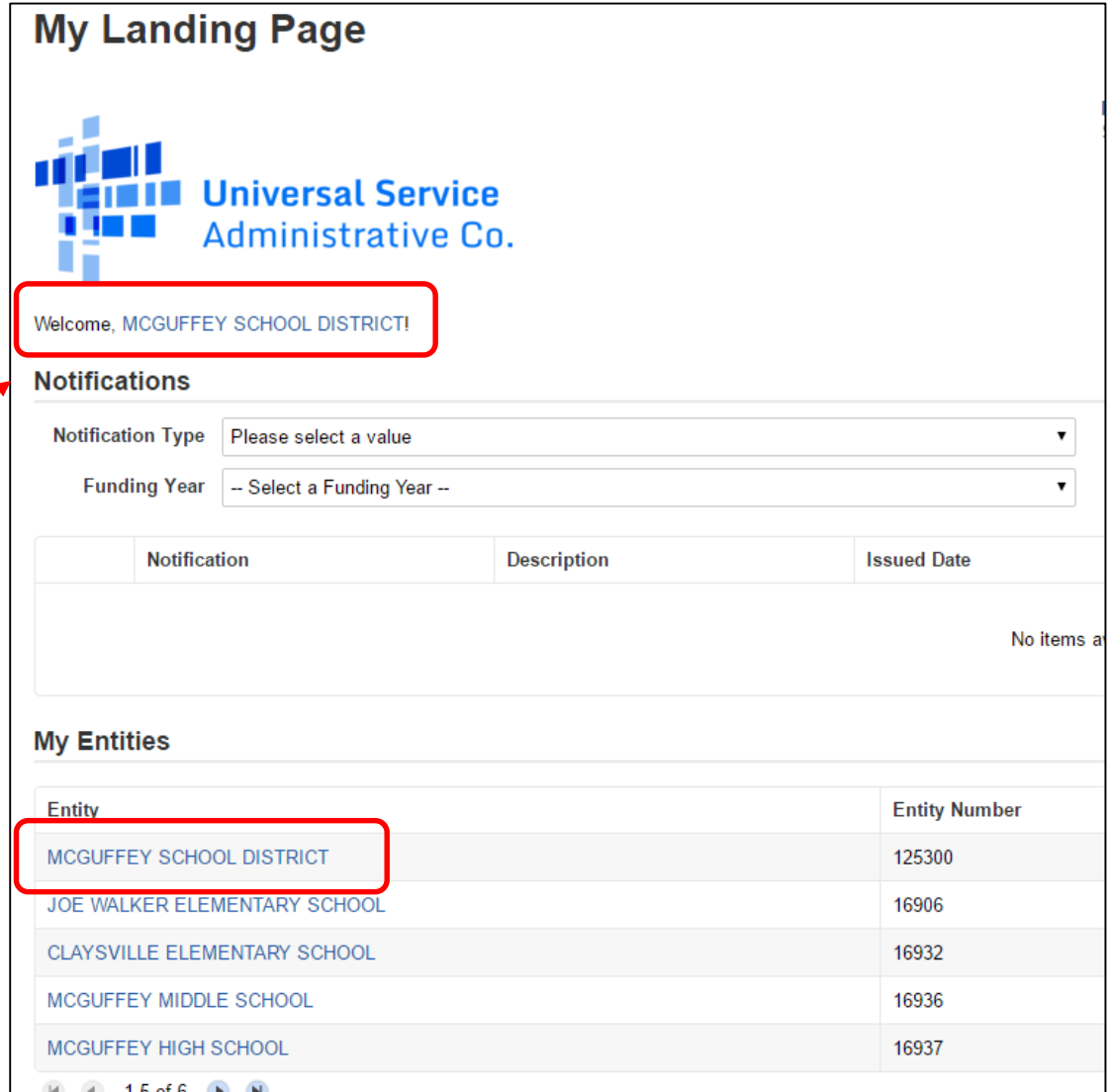
Contract Records – Additional Details

- **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**
 - If you conducted a PEPPM Mini-Bid (in lieu of a Form 470), refer to a separate Guide related to the data that should be entered in the Contract Module for those 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 entity from either location:

- Next to "Welcome"
- Top of My Entities list



My Landing Page

 **Universal Service Administrative Co.**

Welcome, MCGUFFEY SCHOOL DISTRICT!

Notifications

Notification Type: Please select a value

Funding Year: -- Select a Funding Year --

Notification	Description	Issued Date
No items a		

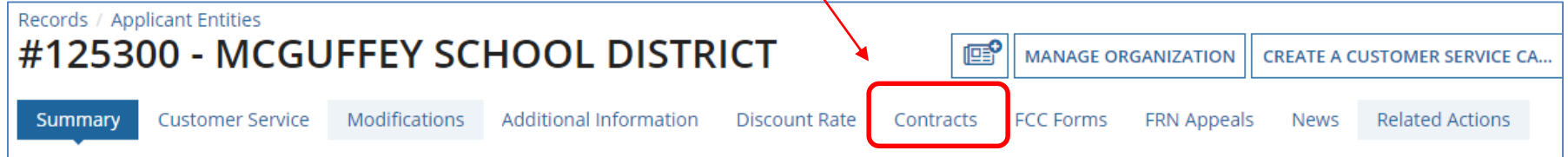
My Entities

Entity	Entity Number
MCGUFFEY SCHOOL DISTRICT	125300
JOE WALKER ELEMENTARY SCHOOL	16906
CLAYSVILLE ELEMENTARY SCHOOL	16932
MCGUFFEY MIDDLE SCHOOL	16936
MCGUFFEY HIGH SCHOOL	16937

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Where Is the Contract Module?

- Then click on Contracts on the top toolbar



Records / Applicant Entities
#125300 - MCGUFFEY SCHOOL DISTRICT

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

MANAGE ORGANIZATION CREATE A CUSTOMER SERVICE CA...

The screenshot shows a software interface for an applicant entity. The top toolbar contains several buttons: 'Summary', 'Customer Service', 'Modifications', 'Additional Information', 'Discount Rate', 'Contracts', 'FCC Forms', 'FRN Appeals', 'News', and 'Related Actions'. The 'Contracts' button is highlighted with a red box, and a red arrow points to it from the text above. Above the toolbar, there are two buttons: 'MANAGE ORGANIZATION' and 'CREATE A CUSTOMER SERVICE CA...'. The breadcrumb 'Records / Applicant Entities' is visible at the top left.

Navigation to “Manage Contracts”

Click on the “Manage Contracts” button

Records / Applicant Entities
#125300 - MCGUFFEY SCHOOL DISTRICT

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

MANAGE CONTRACTS

Manage Contracts

Contracts - MCGUFFEY SCHOOL DISTRICT (BEN: 125300)

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.

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE

Click on the “Add a New Contract” button

Contract Information

MCGUFFEY SCHOOL DISTRICT (BEN: 125300) - - Contract ID

Contract Information

Establishing FCC Form 470

Service Provider

Contract Dates

Pricing Confidentiality

Confirmation

Here you will enter preliminary information about this contract, as well as your account number, if you know it.

Contract Information

Enter a nickname to easily identify this contract ? *

Contract Number ?

optional

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"

"2020 – ABC Vendor – Switches"

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

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Contract Uploads

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

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

Contract Information

Contract ID #199259 ⓘ

A number is assigned by the system.

Note: Upload C2 contracts because PIA will ask you for them anyway.

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

YES NO

Select Yes or No depending on whether you are going to upload a copy of your contract. If Yes is selected, system will prompt you to upload the electronic file from your computer.

BACK CANCEL SAVE & CLOSE SAVE & CONTINUE

Contract Uploads

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

Contract Information


Contract ID #199259


Would you like to upload a copy of your contract?

YES ✓ NO

Contract Document Upload

Please upload and describe each document related to your contract.

 2018 - Comcast - Lit Fiber WAN Contract
DOCX - 48.88 KB

 2018 - Comcast - Lit Fiber WAN Contract Exhibit A
DOCX - 48.88 KB

 Drop file here

Describe this contract document.

Describe this contract document.

A description may be added for each uploaded contract document.

Multiple documents related to the same contract may be uploaded.

Contract Information

Here you will answer additional questions about this contract.

Contract Information

Is this contract based on a State Master Contract? ?

YES NO ✓

Is this contract based on a multiple award schedule? ?

YES NO ✓

Answer No, unless this is a PEPPM-related contract, then answer “Yes” and follow the PEPPM-specific answers provided in a separate message/Guide.

Answer No, unless this is a PEPPM-related contract, then answer “Yes” and follow the PEPPM-specific answers provided in a separate message/Guide.

Contract Information

Here you will answer additional questions about this contract.

Contract Information

Can other applicants piggy back off this contract? ⓘ

YES NO ✓

← Mostly likely answer is No.

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

YES NO ✓

← Mostly likely answer is No.

Establishing Form 470/# Bids

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?

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 you posted a Form 470.

Enter the number of bids received. 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.

Establishing Form 470 – Tricky!

Here you can use the search tool below to associate an FCC Form 470 with the 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 ✓

Use the search tool below to find the establishing FCC Form 470.

Remember that the services in the contract had to be posted on the FCC Form 470.

Remember you cannot file your Form 471 before the Allowable Contract Date.

If the Form 470 was posted as of FY 2016 or later, (since EPC was created), select “NO” and then search from 470s in EPC.

If the Form 470 was posted prior to FY 2016, select “Yes” and the system will prompt you to manually enter the Form 470 #.

Be careful to choose the correct answer!

Searching EPC for the Establishing Form 470

Locate all of your FY 2016 - FY 2020 Form 470s by clicking "Search"

Search FCC Forms 470

Search by FCC Form 470 Number

Search by Nickname (Partial or Full)

Search by BEN

Then select the check box for the applicable 470.

CLEAR FILTERS

SEARCH

<input type="checkbox"/>	FCC Form 470 Number	Nickname	↑ Funding Year	BEN	BEN Name	Allowable Contract Date	Service Type
<input type="checkbox"/>	160012999	FY 2016 Internet Access - McGuffey SD	2016	125300	MCGUFFEY SCHOOL DISTRICT	1/18/2016	Internet Access and/or Telecommunications
<input checked="" type="checkbox"/>	180007718	McGuffey - Internet - FY 2018	2018	125300	MCGUFFEY SCHOOL DISTRICT	1/3/2018	Internet Access and/or Telecommunications

BACK

CANCEL

SAVE & CLOSE

SAVE & CONTINUE

Form 470s Posted Prior to FY 2016

Note: If you select "Yes, that the 470 was posted prior to FY 2016, you will manually enter the 470 # (or copy and paste it from your previous 471 or FCDL.)

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

You should only select this option if you posted the FCC Form 470 for these services prior to Funding Year 2016. If you are unsure, please select No to the prior question, and search for the FCC Form 470.

How many bids were received? ⓘ *

3

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

FCC Form 470 Number ⓘ *

Because the FCC Form 470 was posted prior to 2016, EPC is unable to determine if this FCC Form 470 is valid. Please check the number carefully before continuing.

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

Service Provider Information

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

Service Provider

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

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

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

CLEAR FILTERS

SEARCH

Service Provider Information

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

Search Service Providers

Search by SPIN

Search by Name (Full or Partial)

CLEAR FILTERS

SEARCH

*

<input type="checkbox"/>	SPIN	Name	Doing Business As	State
<input checked="" type="checkbox"/>	143003990	Comcast Business Communications	Comcast Business Communications	PA
<input type="checkbox"/>	143025596	Comcast of Oregon II, Inc.		PA
<input type="checkbox"/>	143025449	Comcast of Oregon Washington		OR
<input type="checkbox"/>	143026653	Comcast Cablevision of Fort Wayne, LLP		IN
<input type="checkbox"/>	143013989	Comcast Cable Communications, Inc.		CA

< 1 - 5 of 14 >

Contract Dates

Need to choose “Yes” or “No” for Multi-Year Contract

Here you will answer additional questions about the dates on your contract.

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

Words of Caution: Your Contract Award Date must be **on or after** the Allowable Contract Date (which is the 29th day after you posted your 470) and **before** the filing and certification date of the Form 471.

Contracts w/Limited Extensions

Select "No" if contract has no extensions.
Select "Yes" if contract has limited # of extensions available.

Contract Dates

Does this contract include voluntary extensions?

YES ✓ NO

Provide last possible contract expiration date if all extensions are used

of extensions remaining on the contract (stated in # of years)

of months remaining on the contract if all extensions were to be used (include months in upcoming funding year)

What is the contract expiration date if all extensions are exercised? *

mm/dd/yyyy

How many extensions are left on the contract? *

Enter the number of voluntary extensions that you could still exercise on this contract.

What is the total remaining length of the contract if you exercised all extensions (in months)? *

Enter the number of months that would remain in the contract if you exercised all voluntary extensions.

Pricing Confidentiality

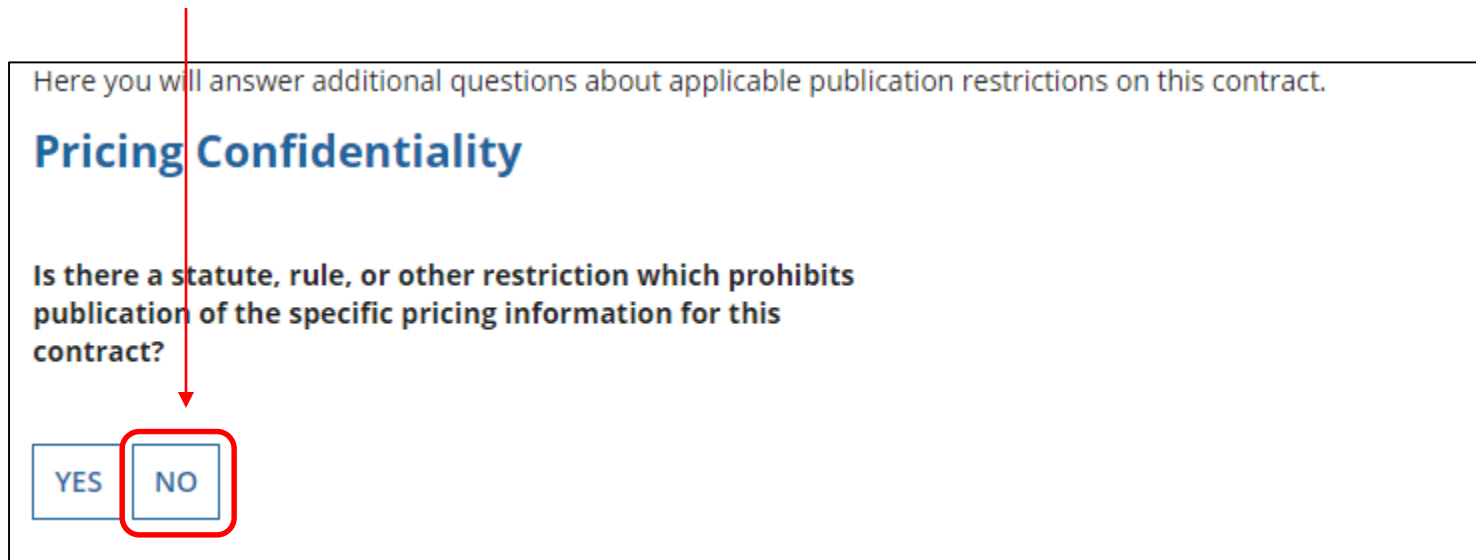
Always select “No” to indicate there is no legal restriction to prevent the publication of the pricing information for the contract.

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?

YES NO

A screenshot of a web form titled "Pricing Confidentiality". The form contains a question: "Is there a statute, rule, or other restriction which prohibits publication of the specific pricing information for this contract?". Below the question are two buttons: "YES" and "NO". The "NO" button is highlighted with a red square border. A red arrow points from the top of the page down to the "NO" button.

Word of Caution: There must be an actual statute in place in order to answer “Yes.” It is not permissible for the vendor to simply state that their pricing is confidential.

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.”

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

Create Contract: Confirmation

MCGUFFEY SCHOOL DISTRICT (BEN: 125300) - 2018 - Comcast - Lit Fiber WAN - Contract ID #199259

Last Saved: 1/17/2018 4:12 PM 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	2018 - Comcast - Lit Fiber WAN	Contract ID	199259
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	#180007718	Number of Bids Received	3
----------------------------------	------------	--------------------------------	---

Service Provider

Service Provider	Comcast Business Communications (SPIN: 143003990)	Account Number	
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Contract Dates

Award Date	1/17/2018	Multi-Year Contract?	Yes
Includes Voluntary Extensions?	Yes		

Extension Details:

- There are 1 remaining voluntary extensions.
- There are 24 months remaining in this contract if all extensions are exercised.
- This contract expires on 6/30/2020 if all extensions are exercised.

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
2018 - Comcast - Lit Fiber WAN Contract	
2018 - Comcast - Lit Fiber WAN Contract Exhibit A	

BACK CANCEL


SAVE & CLOSE

COMPLETE

List of Submitted Contract Records

Records / Applicant Entities

#125300 - MCGUFFEY SCHOOL DISTRICT

 [MANAGE CONTRACTS](#)

[Summary](#) [Customer Service](#) [Modifications](#) [Additional Information](#) [Discount Rate](#) **[Contracts](#)** [FCC Forms](#) [FRN Appeals](#)

[News](#) [Related Actions](#)

Submitted Contracts

Contract ID	Contract Number	Contract Nickname	Award Date	
22883		2016 - Internet Access - Comcast Contract	3/17/2016	View
16480		2014 - Fiber WAN - Comcast Contract	3/21/2014	View

Submitted contracts appear in the Contracts Records List and will be available for selection when filing a Form 471

Editing or Deleting a Draft Contract

From your Landing Page, select Entity Name, then “Contract” and then “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 - MCGUFFEY SCHOOL DISTRICT (BEN: 125300)

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"/>	199259		2018 - Comcast - Lit Fiber WAN	1/17/2018 1:33 PM EST	1/17/2018 4:12 PM EST

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE