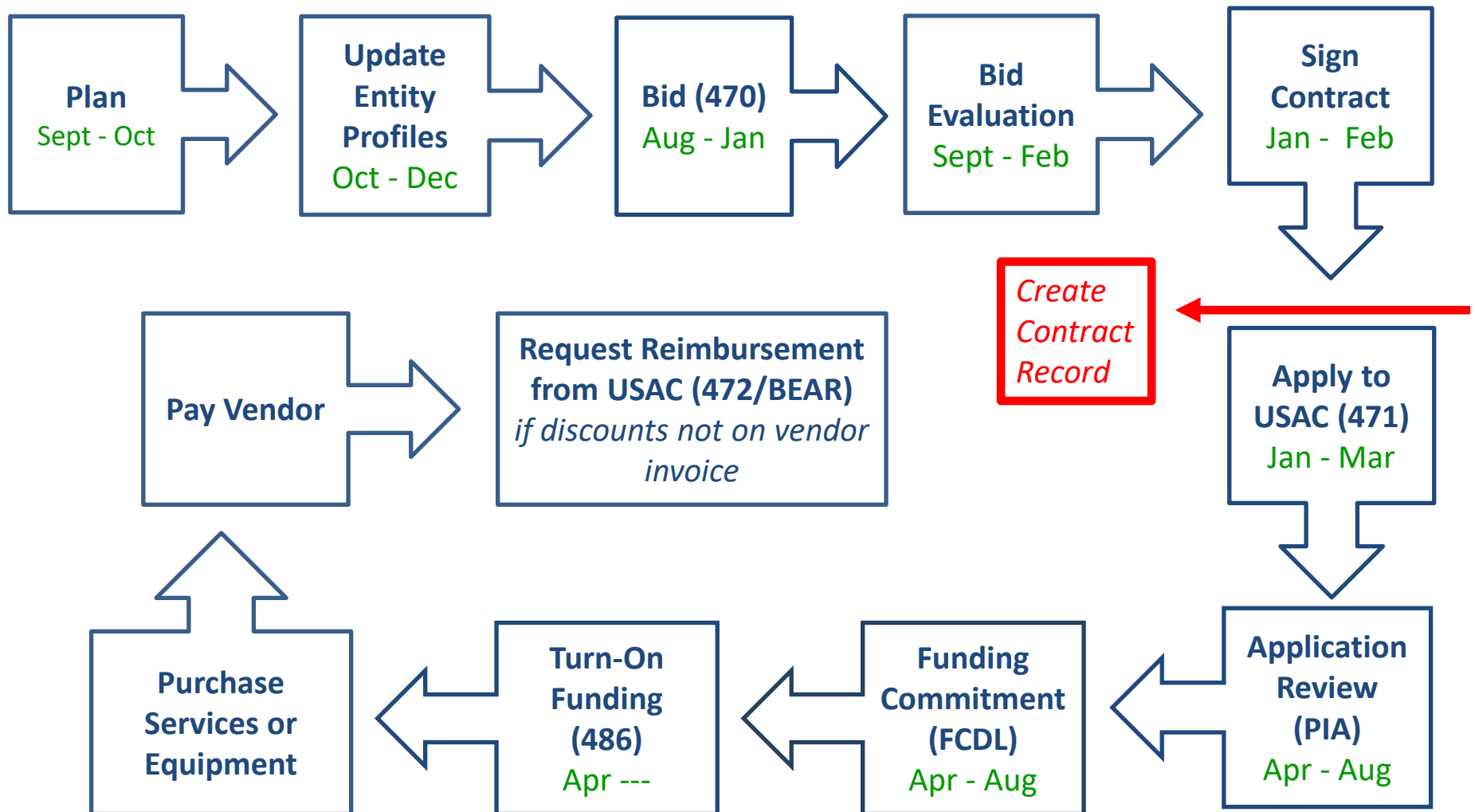


Contract Records Guide for PEPPM - FY 2023



Presented by Julie Tritt Schell
PA E-rate Coordinator
for the Pennsylvania Department of Education
February 2023

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



PEPPM-Based Contracts

- 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 # - 230000227
 - 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 identify where PEPPM-related information must be listed



~ PEPPM ~

Purpose of Contract Records

- 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". The "Contract" button is highlighted with a red rectangular border.

- 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 2023, 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 contracts, including C2 contracts, because PIA will likely ask you for them if they're not in your Contract Record
- **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 this Guide for the data that should be entered in the Contract Module for those contracts
 - Except for the PEPPM Form 470 # (230000227), 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 Record

Where Is the Contract Module?

My Landing Page



[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Hurricane Impact Designation](#) | [Manage Users](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Welcome OWEN J ROBERTS SCHOOL DISTRICT!

Notifications

Notification Type

Funding Year

Status All
 Generated
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

My Entities

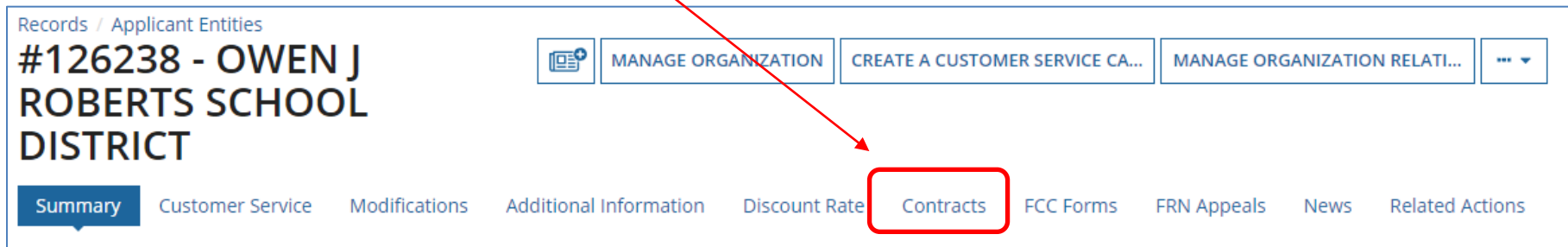
Entity	Entity Number	City	State	Zip Code
OWEN J ROBERTS SCHOOL DISTRICT	126238	POTTSTOWN	PA	19465
NORTH COVENTRY ELEM SCHOOL	20977	POTTSTOWN	PA	19465
EAST COVENTRY ELEM SCHOOL	20979	POTTSTOWN	PA	19465
OWEN J ROBERTS MIDDLE SCHOOL	20980	POTTSTOWN	PA	19465
OWEN J ROBERTS HIGH SCHOOL	20981	POTTSTOWN	PA	19465

From the EPC Landing Page, click on the name of your entity from either location:

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

Where Is the Contract Module?

- Then click on Contracts on the top toolbar



Records / Applicant Entities

**#126238 - OWEN J
ROBERTS SCHOOL
DISTRICT**

MANAGE ORGANIZATION CREATE A CUSTOMER SERVICE CA... MANAGE ORGANIZATION RELATI... ...

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

Navigation to “Manage Contracts”

Click on the “Manage Contracts” button

Records / Applicant Entities

#126238 - OWEN J ROBERTS SCHOOL DISTRICT

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

MANAGE CONTRACTS

Manage Contracts

Contracts - OWEN J ROBERTS SCHOOL DISTRICT (BEN: 126238)

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

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

Create Contract

OWEN J ROBERTS SCHOOL DISTRICT (BEN: 126238) - 2023 – HP - ePlus - Switches

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

Contract Information

Enter a nickname to easily identify this contract ⓘ *

2023 – HP - ePlus – Switches

Contract Number ⓘ

~ optional ~

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”

“2023 – HP - ePlus – Switches”

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

Contract Uploads

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

Contract Information

Contract ID #254362 ⓘ

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

Contract Document Upload

Please upload and describe each document related to this contract.

UPLOAD



Drop file here

Select Yes and upload a copy of your PEPPM-based contract. The system will prompt you to upload the electronic file from your computer. Note: certain characters are not allowed in the file names this year, such as “-:”

Contract Uploads

Contract Information


Contract ID #254362 ⓘ


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.

 2023 HP ePlus Switches Contract
Appendix A

 2023 HP ePlus Switches Contract
PDF - 1.04 MB

UPLOAD  Drop file here

Describe this contract document.

Describe this contract document.

Describe this contract document.

Optional: A description may be added for each uploaded contract document. Not required.

Multiple documents related to the same contract may be uploaded.

Contract Information

~ PEPPM ~

Contract Information

Is this contract based on a State Master Contract?

YES ✓ NO

Is this contract based on a multiple award schedule? ⓘ

YES ✓ NO

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

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.

Contract Information

~ PEPPM ~

Can other applicants piggy back off this contract? ?

YES NO ✓

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? ?

YES NO ✓

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

Establishing Form 470/# Bids

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?

How many bids were received? ? *

2|

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

Click on the "Yes" button to indicate a Form 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 ~

Establishing Form 470 – Tricky!

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

YES

NO ✓

Answer NO – the PEPPM 470 was posted after FY 2016

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.

Search FCC Forms 470

Search by FCC Form 470 Number

230000227

Search by Nickname (Partial or Full)

~ PEPPM ~

Search by BEN

CLEAR FILTERS

SEARCH

Then enter 230000227 in the 470 search box, and clear the BEN number that's showing in the box below it. (If you search by *your* BEN, the system will only show 470's that you have posted and not the PEPPM 470.) Click Search

Searching EPC for the Establishing Form 470

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 PEPPM 470.

<input checked="" type="checkbox"/>	FCC Form 470 Number	Nickname	Funding Year	BEN	BEN Name	Allowable Contract Date	Service Type
<input checked="" type="checkbox"/>	230000227	PA State PEPPM Contract	2023	17000299	PA State PEPPM Consortium (Central Susquehanna Intermediate Unit)	8/31/2022	Basic Maintenance of Internal Connections; Data Transmission and/or Internet Access; Internal Connections; Managed Internal Broadband Services

Service Provider Information

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

~ optional ~|

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)

ePlus

CLEAR FILTERS

SEARCH

*

Enter the SPIN or Name of the Service Provider and then Search.
If you're unsure of the SPIN, check with the vendor, or search at:
<https://data.usac.org/publicreports/SpinDownload/Spin/Download>

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)

*

<input type="checkbox"/>	SPIN	Name	Doing Business As	State
<input checked="" type="checkbox"/>	143006553	ePlus Technology, Inc.		VA
<input type="checkbox"/>	143009623	TelePlus, Inc.		IL
<input type="checkbox"/>	143051898	OfficePlus		MA

Contract Dates

Generally, PEPPM-related contracts are not multi-year contracts so select No.

Contract Dates

Is this a multi-year contract?

What is the date you awarded your contract? *

1/28/2023

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.

Contracts w/Limited Extensions

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

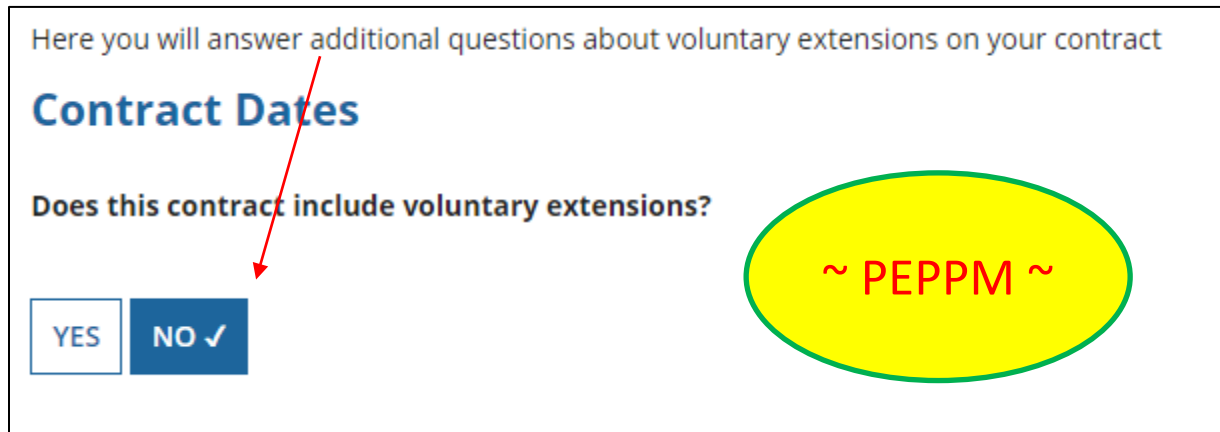
Here you will answer additional questions about voluntary extensions on your contract

Contract Dates

Does this contract include voluntary extensions?

YES NO ✓

~ PEPPM ~

A screenshot of a web form for contract dates. The form has a title 'Contract Dates' and a question 'Does this contract include voluntary extensions?'. Below the question are two radio button options: 'YES' and 'NO ✓'. A red arrow points from the top of the 'NO' option to the text '~ PEPPM ~' which is enclosed in a yellow oval with a green border.

Pricing Confidentiality

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

Pricing Confidentiality

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

YES NO ✓

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.

Contract Information

Nickname	2023 - HP - ePlus - Switches	Contract ID	418805
Can Other Applicants Piggy Back Off This Contract?	No	Contract Number	
Piggy Backed Off Another Contract?	No	Based on a State Master Contract?	Yes
		Based on a Multiple Award Schedule?	Yes

Establishing FCC Form 470

Establishing FCC Form 470	#230000227	Number of Bids Received	2
---------------------------	------------	-------------------------	---

Service Provider

Service Provider	ePlus Technology, Inc. (SPIN: 143006553)	Account Number	
------------------	--	----------------	--

Contract Dates

Award Date	1/28/2023	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

There are no supporting documents for this contract.


BACK CANCEL

SAVE & CLOSE COMPLETE

List of Submitted Contract Records

Records / Applicant Entities

#126238 - OWEN J ROBERTS 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	
254362		2023 – HP – ePlus - Switches	1/28/2023	View
130211		2017 - Cisco Wireless/Switches - Zones	2/27/2017	View
70344		2016 - Cisco - Zones Contract	4/25/2016	View
8723		2016 - Owen J Roberts - Sunesys Fiber Contract	2/24/2014	View
8719		FY2016 - Owen J Roberts - Internet - Chesconet Contract	2/22/2016	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 - OWEN J ROBERTS SCHOOL DISTRICT (BEN: 126238)

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"/>	254420		2023 – HP – ePlus Switches	2/9/2023	2/9/2023

CLOSE

ADD A NEW CONTRACT

EDIT

DELETE