

# E-rate Training Workshop for Veteran PA Applicants



Presented by Julie Tritt Schell  
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for the Pennsylvania Department of Education  
October 2022  
[www.e-ratepa.org](http://www.e-ratepa.org)

# Lots to Cover!

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- Wrapping Up FY 2021 & FY 2022
  - FY 2022 Form 486s Due
  - FY 2021 BEARs (Form 472 Reimbursement Form)
- BEAR Transition into EPC
- Updating EPC Account Administrators
- 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 2023 Anticipated Window Dates and Suggested Filing Timing
- Review of Revisions to Form 470
- PEPPM Bidding Delay for FY 2023
- Eligible Services for FY 2023
- Bidding Portal
- Deadline to Install FY 2021 Internal Connections

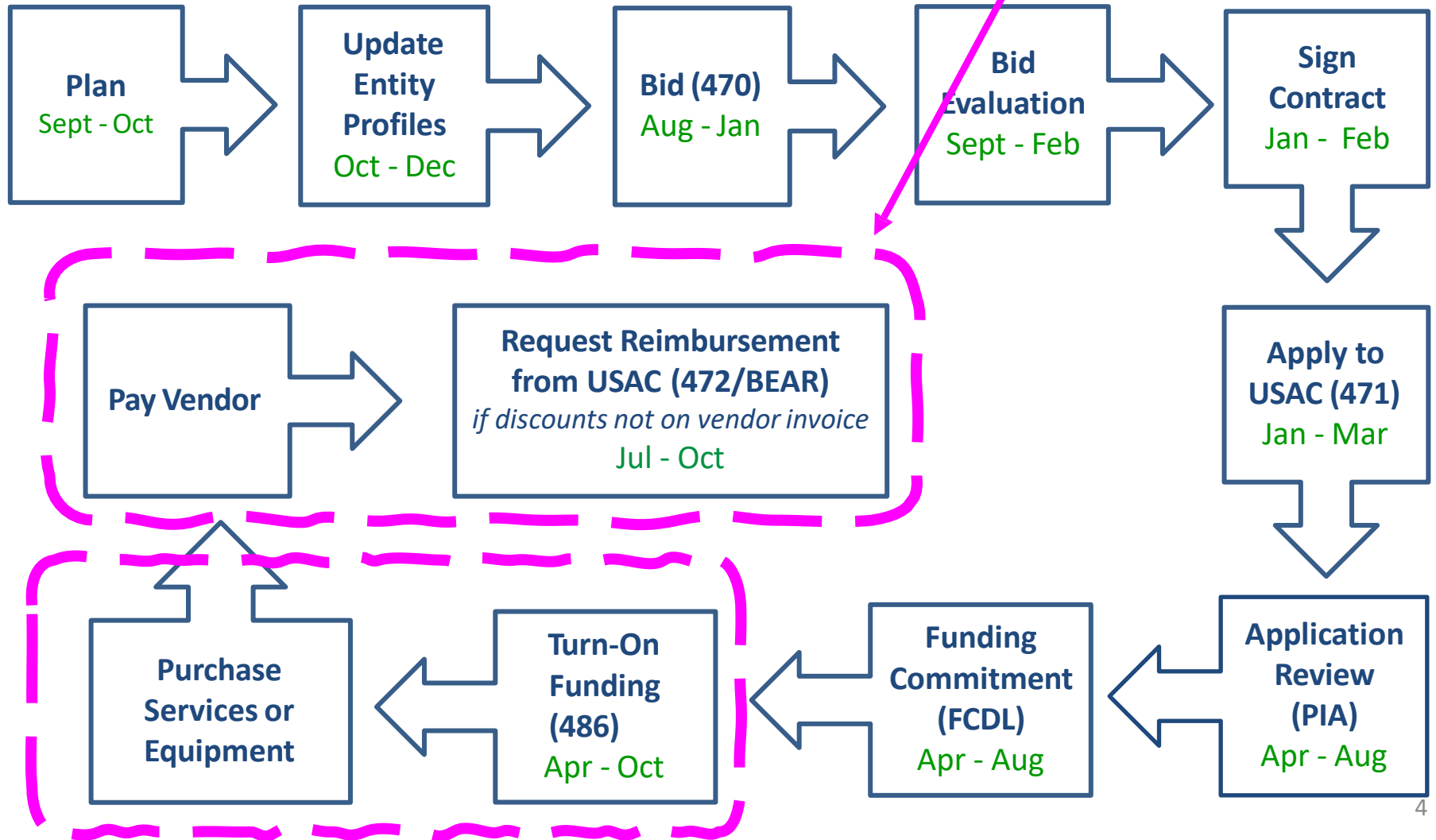
# ***Finishing FY 2022***

***(July 1, 2022 – June 30, 2023)***



# The E-rate Cycle

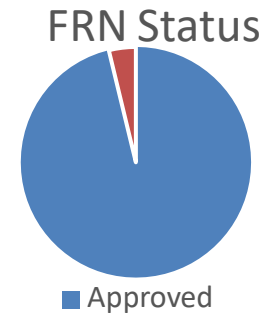
For FY 2022, we are here



# Status of PA FY 2022 FCDLs

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- 2263 FRNs submitted
  - \$61.7 million committed thus far
    - \$29.74 funded for Category 2
  - 41 FRNs still “pending” for 24 entities
    - Requesting about \$2.6 million
    - About 2/3 are for Category 2
- Compared to the same time last year, we are at about the same place
- Not seeing delays in processing post-commitment requests (SPIN changes, service substitutions, appeals)
  - If you’ve had a post-commitment or BEAR form pending more than 60 days, use Contact Us feature in EPC to request that it be escalated



# FY 2022 Sources of Confusion

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- FY 2022 Denials:
  - Only 11 FRNs denied = < .5%
  - \$84,000 denied
  - Denial reasons:
    - On red light status
    - Duplicate services
    - No 470 posted
    - Bid wrong category
    - Didn't bid correct category
    - Lack of detail on 470
    - Didn't reply to PIA request
    - Specified preference for self provisioned fiber in RFP
    - Ineligible equipment
  - If you have a question, please ask!



# FY 2022 Form 486s

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- If you have been funded for FY 2022, don't forget to file your Form 486 to “turn-on funding” and certify CIPA compliance
  - 66 PA entities still need to file
  - 486 Due List available at: <http://e-ratepa.org/wp-content/uploads/2014/03/Missing-486s-as-of-Oct-26-FY-2022.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!



# Reminder: Labeling & Equipment Transfer Rules

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- **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



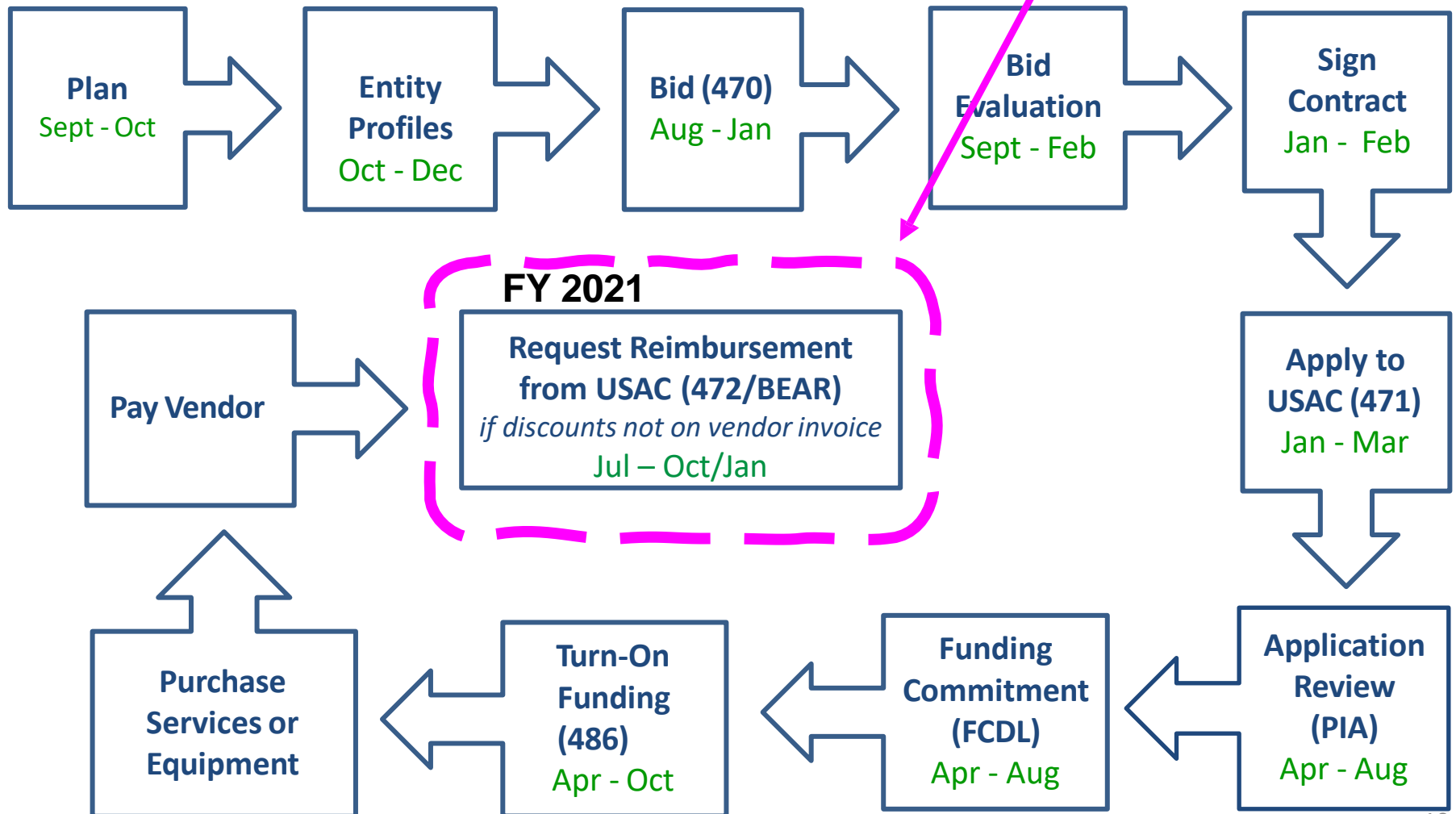
# ***Finishing FY 2021***

***(July 1, 2021 – June 30, 2022)***



# The E-rate Cycle

For FY 2021, 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 FY 2021 *recurring services***
  - **October 28, 2022** is the invoicing deadline
    - Last date to receive service was June 30, 2022
  - C1 FRNs with imminent BEAR deadlines: <http://e-ratepa.org/wp-content/uploads/2014/03/FY-2021-BEARs-Due-as-of-Oct-26-2022-urgent.xlsx>
- **For FY 2021 *non-recurring purchases***
  - Normally, the last date to receive/install equipment was September 30, 2022
    - (Jan 28, 2023 would have been BEAR deadline)
  - FCC granted a 1-year extension due to supply chain problems
  - Thus, the new BEAR deadline will be January 28, 2024

# Requesting an Invoice Deadline Extension

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- If you cannot make the BEAR deadline, **OR** if your BEAR was submitted but has not yet been paid, **file for an Invoice Deadline Extension (IDER)**
- IDERs must be requested by the invoice deadline (Oct. 28)
- 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
- IDER Filing Guide at:  
<http://e-ratepa.org/wp-content/uploads/2014/03/IDER-Filing-Guide.pdf>



# Must Have BEAR Credentials



- Each EPC User must have ‘authorization’ in EPC to file a BEAR
- How do you know if you have BEAR authorization?
- If you log-in to One Portal and don't see the BEAR option, you don't yet have authorization

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.

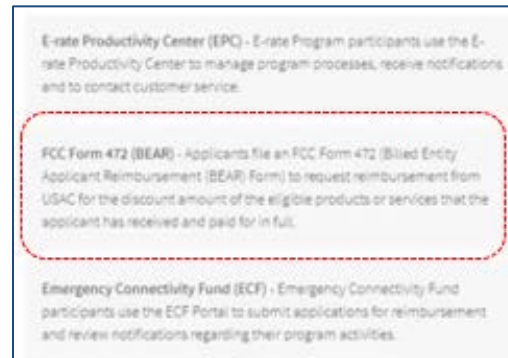
Click here for BEAR Form

- To gain authorization, simply complete the BEAR Access Template and submit to USAC
  - Template available at: <https://www.usac.org/e-rate/resources/forms/bear-form-access/>
  - Filing Guide: <http://e-ratepa.org/wp-content/uploads/2014/03/Form-472-BEAR-Access-Request-Guide-1.pdf>
  - Submit completed template in EPC using ‘Contact Us’ feature
  - BEAR authorization will be granted within a few days
  - Also request invoice deadline extension...

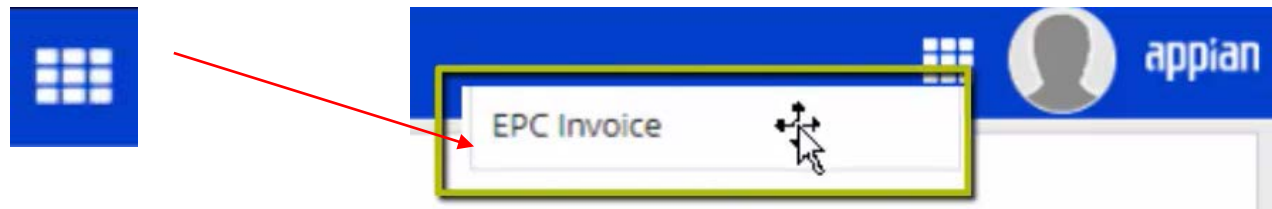
# BEARs: Big Changes Coming!



- Beginning mid-December (2022), USAC will migrate E-rate BEAR functionality into EPC!
  - The middle option into legacy BEAR system will go away



- Instead, when you log into EPC, you will see this grid symbol in the upper right corner of the Landing Page which will take you to the new E-rate BEAR Portal



- For a brief tutorial of the new BEAR system, visit: <https://www.usac.org/e-rate/resources/e-rate-system-consolidation>
- You'll note it looks very similar to the ECF invoicing system

# BEAR Permissions



- In the next few weeks, USAC will add a BEAR Form 472 Permission column to the EPC Users page
  - Page only visible to EPC Account Administrators (AA)
- USAC is *attempting* to migrate all existing BEAR authorized users so you can continue to file in new system
- If this isn't possible, or if someone isn't migrated, AA will have to manually provide authorization to EPC user(s) for their organization

**Manage User Permissions**

**Organization Details**

|                 |  |                         |              |
|-----------------|--|-------------------------|--------------|
| Name            | ABC SCHOOL DISTRICT                                  | FCC Registration Number | 11111        |
| Address         | 123 Main Street<br>SPRINGFIELD, NY 11111<br>New York | Organization Type       | Applicant    |
| Mailing Address | 123 Main Street<br>SPRINGFIELD, NY 11111<br>New York | Phone Number            | 111-111-1111 |
|                 |  | Email                   |              |

**User Permissions**

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks that can be completed in the system. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot do anything to them.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate existing Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify, modify, update Forms 498 or deactivate existing Forms 498.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

| Name         | Email                        | Apply All                | 470 Permission | 471 Permission | 472 Permission | 498 Permission             | Post-Commitment Permission | 486 Permission | Appeals Permission |
|--------------|------------------------------|--------------------------|----------------|----------------|----------------|----------------------------|----------------------------|----------------|--------------------|
| Althea Smith | asmith@ABCschooldistrict.net | <input type="checkbox"/> | Full           | Full           | Full           | School or Library Official | Full                       | Full           | Full               |
| ROBERT SMITH | rob@ABCschooldistrict.net    | <input type="checkbox"/> | Full           | Full           | Full           | No Access                  | Full                       | Full           | Full               |

# Time to Update Your AA's

Don't know who it is?

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



2) Summary page will show current Account Administrator

3) If AA is no longer accurate, call USAC at 888-203-8100 and they will work with you to modify the AA

Records Applicant Entities  
#116 - School District 6

CREATE A NEW USER ADD OR REMOVE EXISTING USERS MANAGE USER PERMISSIONS

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

**Organization Details**

|                         |                   |                |                 |
|-------------------------|-------------------|----------------|-----------------|
| Name                    | School District 6 | Applicant Type | School District |
| Entity Number           | 116               | Status         | Active          |
| FCC Registration Number | 123456789         |                |                 |

**Contact Information**

|                  |  |              |  |
|------------------|--|--------------|--|
| Physical Address | 100 Main Street<br>Springfield, ME 04487 | Phone Number | 555-555-7878                           |
| Mailing Address  | 100 Main Street<br>Springfield, ME 04487 | Email        | school.districts.user1@emailinator.com |
|                  |  | Website URL  |  |

**Account Administrator**

|      |                          |
|------|--------------------------|
| Name | School District 6 User 1 |
|------|--------------------------|

<<< Current Account Administrator

*Note: This is not a quick process, so allow 10-15 minutes when you make the call. Also, do this now before the other states begin to call*





***Emergency Connectivity  
Fund (ECF)  
Update***



# ECF Update

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## Funding Status:

- Total Requested (Windows 1, 2, 3) = \$182 million
- Total Committed (Windows 1, 2, 3) = \$105 million
- Total Disbursed = \$39 million
  - Out of \$56 million committed indicating BEAR invoicing method, only \$20 million has been disbursed
  - Could be that equipment/services not yet delivered
  - But... **if you have received equipment and paid vendor, don't forget to file BEAR to obtain reimbursement**
  - Status of all PA ECF FRNS: <http://e-ratepa.org/wp-content/uploads/2014/03/PA-ECF-All-Data-as-of-Oct-26-2022.xlsx>
- Don't forget to collect signed "unmet needs certifications" from parents/library patrons when equipment distributed
  - Certification examples available at: <http://e-ratepa.org/?p=33555>

# ECF Pending Window 3 Applications

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## **Pending Window 3 Applications:**

- More than \$2.8 billion was requested nationwide in Window 3
  - Only \$1.5 billion available
- Funding prioritized using E-rate discounts (with preference to rural entities in each discount band)
- Currently, apps funded down to 85% discount level (80% + 5% for rural applicants)
  - This does not mean that you will only receive a percentage of your funding; it is simply a way for USAC to determine order of funding priority
- No final determination has been made where funding will be cut off, which is good news
  - Efforts underway to seek additional \$1 billion from Congress to fully fund Window 3 applications

## **How can you help?**

- “Decommit” unneeded ECF funding commitments
- Follow these steps: Log into ECF Portal > My Forms and Requests > Click on the ECF 471 Application Number > Related Actions > Create a Post-Commitment Request.

# ECF Invoicing

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- **Invoice Deadlines:**
  - ECF Windows 1 and 2 - deadline is August 29, 2023
  - ECF Window 3 - deadline is February 29, 2024
  - Form 472 BEAR Filing Guide is available at: <http://e-ratepa.org/wp-content/uploads/2020/03/ECF-Form-472-BEAR-Reimbursement-Filing-Guide-updated-June-2022.pdf>.
- Why does it take so long for BEARs or SPIs to be processed?
  - Most BEARs and SPIs are not complete
  - USAC must review, then FCC, then sent to US Treasury for payment
- **Don't forget:**
  - You must upload both the vendor invoice AND proof of delivery or shipping with BEAR or SPI
    - For equipment invoices, vendor invoice must contain make/model, unit cost and quantity
  - Your SAM.gov account must be active and up to date
    - SAM.gov contact receives notice when funds are transferred



# ECF – Making Changes

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- Many applicants are seeking to make changes to approved ECF application
  - Equipment make/model
  - SPIN changes
  - Invoicing mode changes
- Submit Post Commitment Request (PCR)
- Log into ECF Portal > My Forms and Requests > Click on the ECF 471 Application Number > Related Actions > Create a Post-Commitment Request
- Normally takes ~30 days to obtain the approval
  - If a post-commitment request has been pending > 30 days, call USAC's ECF Customer Service Center (CSC) at (800) 234-9781 Monday – Friday from 8 a.m. to 8 p.m. ET, or submit a case in their ECF Portal, and ask for your PCR to be escalated

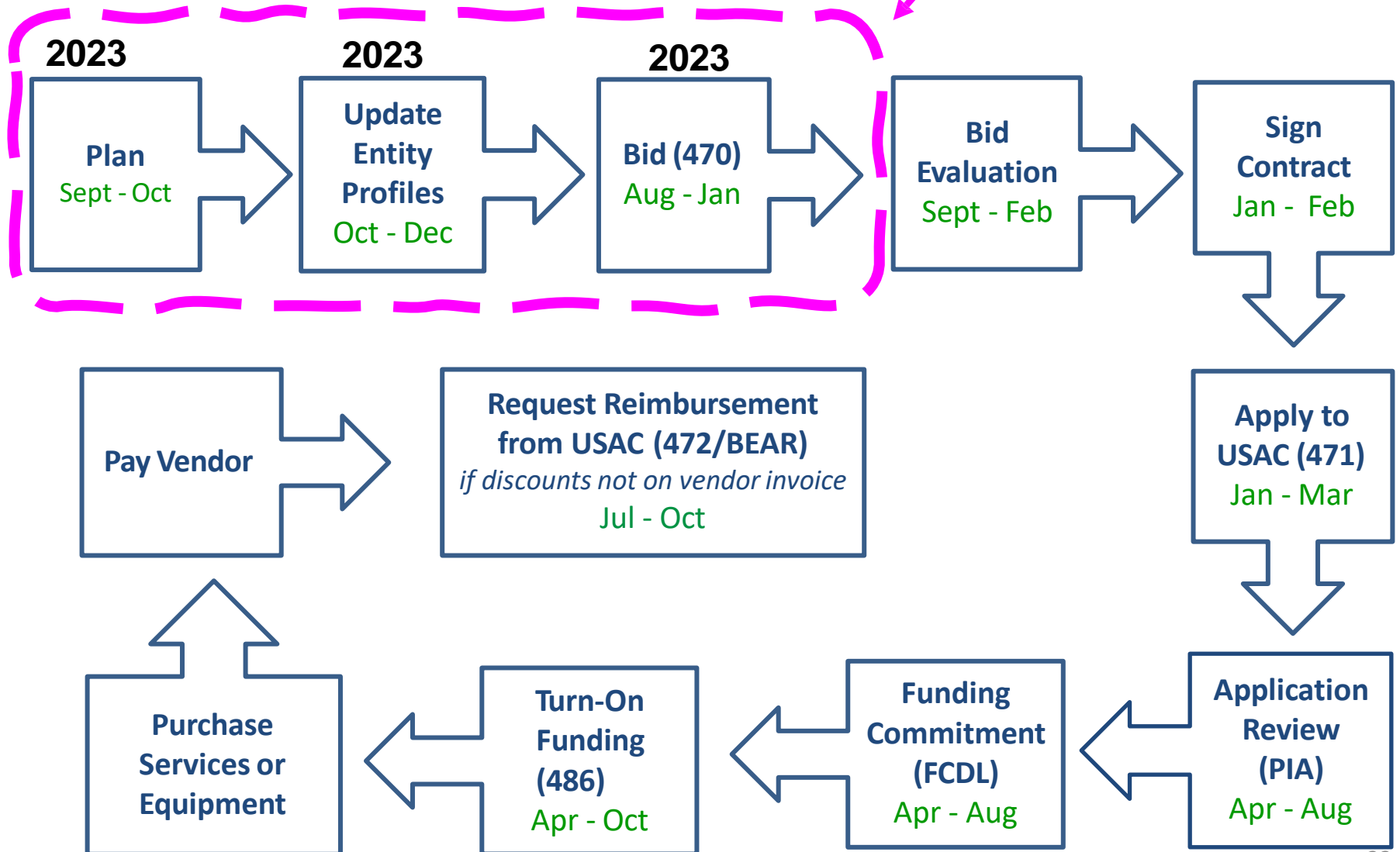


*Let's Shift to  
Funding Year 2023...*



# The E-rate Cycle

For FY 2023, we are here



# FY 2023 “Admin Window”

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- Admin Window is 2-3 months *before* the Form 471 window when schools and libraries update their school or library profiles in EPC portal
    - Open now. Usually closes 2 days before Form 471 filing window opens in January
    - This data is then ported over into the Form 471
  - **Mainly used to update:**
    - **E-rate Discounts:** Must update school profiles with current enrollment/NSLP data to calculate E-rate discounts for upcoming year
      - Julie will obtain October 2022 enrollment/NSLP/CEP data from PDE in mid-December and send to listserve
      - **Most schools wait until then to update EPC profiles**
    - **Category 2 Budgets:** Update enrollment (schools) and square footage changes (libraries) – **but ONLY if it will increase Category 2 budget**
      - Category 2 enrollment data can be different from annual discount-rate enrollment data
        - Doesn’t have to be updated each year
      - C2 enrollment data entered in separate location in EPC
- >>> EPC Landing Page > District Name > Manage Organization > Scroll to bottom of page





# Calculating Remaining C2 Budgets

What is your remaining Category 2 Budget for this C2 cycle?

1) Go to: <https://opendata.usac.org/E-rate/E-rate-C2-Budget-Tool-FY2021-/8z69-hkn7>

2) Enter BEN to filter just your entity's data

3) Summary Table will appear

**Review these columns:**

C2 enrollment currently in EPC

5-Year Pre-Discount C2 Budget

Amount of any "still pending FRNs" in FY 2021 & FY 2022

Amount "committed" in FY 2021 & FY 2022

Remaining available C2 Budget

Filters (2) ✕

[Clear All](#)

State  
PA ▼

Applicant Type  
Select... ▼

City  
Select... ▼

Billed Entity Name  
Select... ▼

BEN  
125300 ▼

Consulting Firm Name (CRN)  
Select... ▼

| Full Ti... | Library... | School... | Library... | C2 Bud...    | C2 Bud... | Funded...    | Pendin... | Availab...  |
|------------|------------|-----------|------------|--------------|-----------|--------------|-----------|-------------|
| 1,605      |            | \$167.00  |            | \$268,035.00 | Confirmed | \$207,881.00 | \$0.00    | \$60,154.00 |

# FY 2023: What's New

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- PEPPM mini-bids cannot be issued until at least January 2
  - PEPPM contract is currently being rebid and new vendor contracts will not be valid until January 2
  - Many awarded vendors may be changing, so be sure to wait for new list/instructions to come to the listserve
- FY 2023 Eligible Services List not yet approved by FCC
  - Wi-Fi on buses not likely to become eligible
  - Cyber-security? Stay tuned
- Bidding Portal? Not yet!
  - *Proposed*: Vendors submit all bids in EPC (not to applicants), all vendor communications must be done in EPC, bid evaluation must be uploaded to USAC
  - Has not yet been adopted by FCC
  - Something is likely coming for FY 2024
  - Be sure to have bid evaluation matrix for all E-rate procurements

# Random Topics/Reminders

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- FY 2023 Rebid List Coming Next Week
- 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
- 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!**
- No Changes to Form 470, but big changes in FY 2020...



# Last Year's Form 470 Changes

- 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.



# Last Year's Form 470 Changes

- 1<sup>st</sup> or 3<sup>rd</sup> 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)*

# Last Year's Form 470 Changes

- 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

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

### Manufacturer

No Preference

### Are you also seeking Installation, Activation and Initial Configuration for this service? \*

- Yes
- No

*Awesome*

# FY 2023 Application Timeline



- Recommended timeline:
  - NOVEMBER: File all Form 470s by Thanksgiving
    - *except PEPPM mini-bids*
  - DECEMBER: Vendor bids submitted
  - MID-DECEMBER: Update EPC profiles after Julie sends updated data
  - 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 2023 Questions to Ask Yourself

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- Is a Form 470 Needed for FY 2023?
  - **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
- Should I update enrollment for C2 to increase budget?

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



# Where to Go For E-rate Help

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- 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](mailto:jtschell@comcast.net)
  - Attend webinars!
  - Read listserve messages!
  - [www.e-ratepa.org](http://www.e-ratepa.org)
    - **Helpful Documents:** [http://e-ratepa.org/?page\\_id=754](http://e-ratepa.org/?page_id=754)
    - **Training:** [http://e-ratepa.org/?page\\_id=745](http://e-ratepa.org/?page_id=745)
    - **ECF Resources:** [http://e-ratepa.org/?page\\_id=32310](http://e-ratepa.org/?page_id=32310)



# Questions?

