# E-rate Form 471
# Category 2 Filing Guide
# FY 2018

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PA E-rate Coordinator
February 2018

# FY 2018 Form 471 Timeline

**Form 471 Deadline = March 22, 2018**

**Form 470 Deadline?**

- If no board approval needed, last possible date to submit Form 470 = February 22, 2018
  - Give yourself at least a week to file the 471, making your Form 470 deadline February 15
- If board IS approval needed, count back 35-40 days from board meeting date, and this is your last date to file 470
  - 35 days instead of 29 days because boards' require documents ahead of meeting

- Do **NOT** wait until these dates to file your 470!
  - Need time to conduct bid evaluations, negotiate contracts, and file the Form 471
  - Always best to avoid filing 471s the last few days of the window due to system glitches
- USAC has promised to review applications in the order they were submitted
  - Have not promised to "fund" applications in this order, however

# What's New for FY 2018?

- **Service Start Date – Always list 7/1/2018**
  - Even if you will be purchasing equipment on or after 4/1/2018
    - Vendor invoices can be dated on or after 4/1/2018
    - BEARs/SPIs cannot be submitted to USAC until 7/1/2018
  - EPC system no longer allows dates prior to 7/1 to be listed
  - Service Start Date is NOT the same as the Contract Award Date
    - Contract Award Date should either be the date the contract was signed (preferred) or the date the vendor was awarded the contract (allowed, but more difficult to prove)
- **Form 470 Error Checking**
  - System will check to see if the cited Form 470 contains the category of service requested on the 471
    - For example, if you are requesting Basic Maintenance funding, but did not select this category on the 470, system will not allow you to proceed
  - System will check to see if the cited Form 470 in the Contract Record was been posted for at least 28 days
    - For example, if you are creating your Contract Record on February 15, but the Form 470 # that you cite was just posted on February 1, the system will not allow you to proceed
- **New Category 2 Bulk Upload Template**
  - Template is identical to last year except they added several vendors to the drop down choices
  - Must use new template on FY 2018 Form 471

# Reminders - FY 2018

- Separate Admin Window
  - Needed so libraries and consortia didn't have to have separate filing window
    - Their discount data is fully dependent on schools' discount data
  - Admin Window over - can no longer update buildings/enrollment/NSLP data
  - Make changes using the FRN narrative boxes, or via the RAL correction process
    - RAL corrections can be submitted as soon as 471 is submitted
  - Consortia members can be added by contacting CSB
    - CSB will not REMOVE consortia members – simply don't add them to your 471
- 'Copy FRN' Feature
  - Allows you to copy another FRN and make changes
  - I do NOT recommend that you use this feature as some system errors have been reported by those who have used it for FY 2018
- Internal Connections Bulk Upload Template
  - Most useful for C2 Internal Connections FRNs with multiple line items
  - Bulk Upload Guide available at www.e-ratepa.org
  - Template available at: https://www.usac.org/_res/documents/sl/xls/window-hq/Category-Two-Internal-Connections-v18.0.xlsm

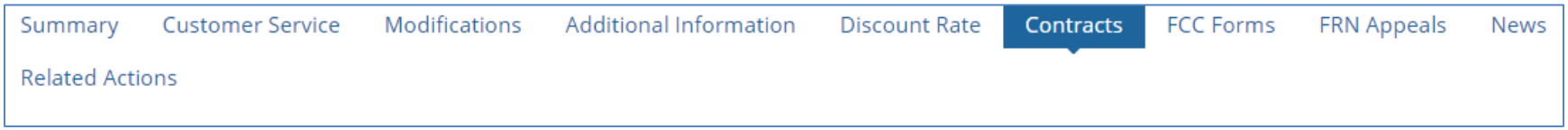
# Helpful Hints for FY 2018

1. Don't forget – all C2 requests must have a signed contract (no MTM)
2. I recommend filing a 471 for EACH separate FRN
   - Doesn't take that much extra time
   - PIA seemed to have an easier time reviewing smaller applications in FY 2017
   - If there's a system glitch with one application, it won't hold up the others
   - Not a USAC requirement
     - Form just requires separate 471s for C1 and C2
3. Be sure to list all unit costs separately
   - Don't just list a single price and quantity of 1 (except for structured cabling)
   - Create an FRN Line Item for each unique SKU, # of units and cost of each unit

# Before Filing the Form 471

- **Add New Contracts** in EPC
  **> Landing Page > Billed Entity Name > Contracts > Manage Contracts > Add New Contract**

  - There is no way to edit or delete an existing CR after it's been submitted
  - Not required to upload contracts, but I recommend you do so for C2 contracts
  - Give your contract a really descriptive nickname!
  - Creating Contract Records Guide = http://e-ratepa.org/?p=24081
  - Creating PEPPM-Related Contract Records Guide = http://e-ratepa.org/?p=24161



# Before Filing the Form 471

- **Update Connectivity Module** in EPC
  **> Landing Page > Billed Entity Name > Related Actions > Manage Connectivity Questions**

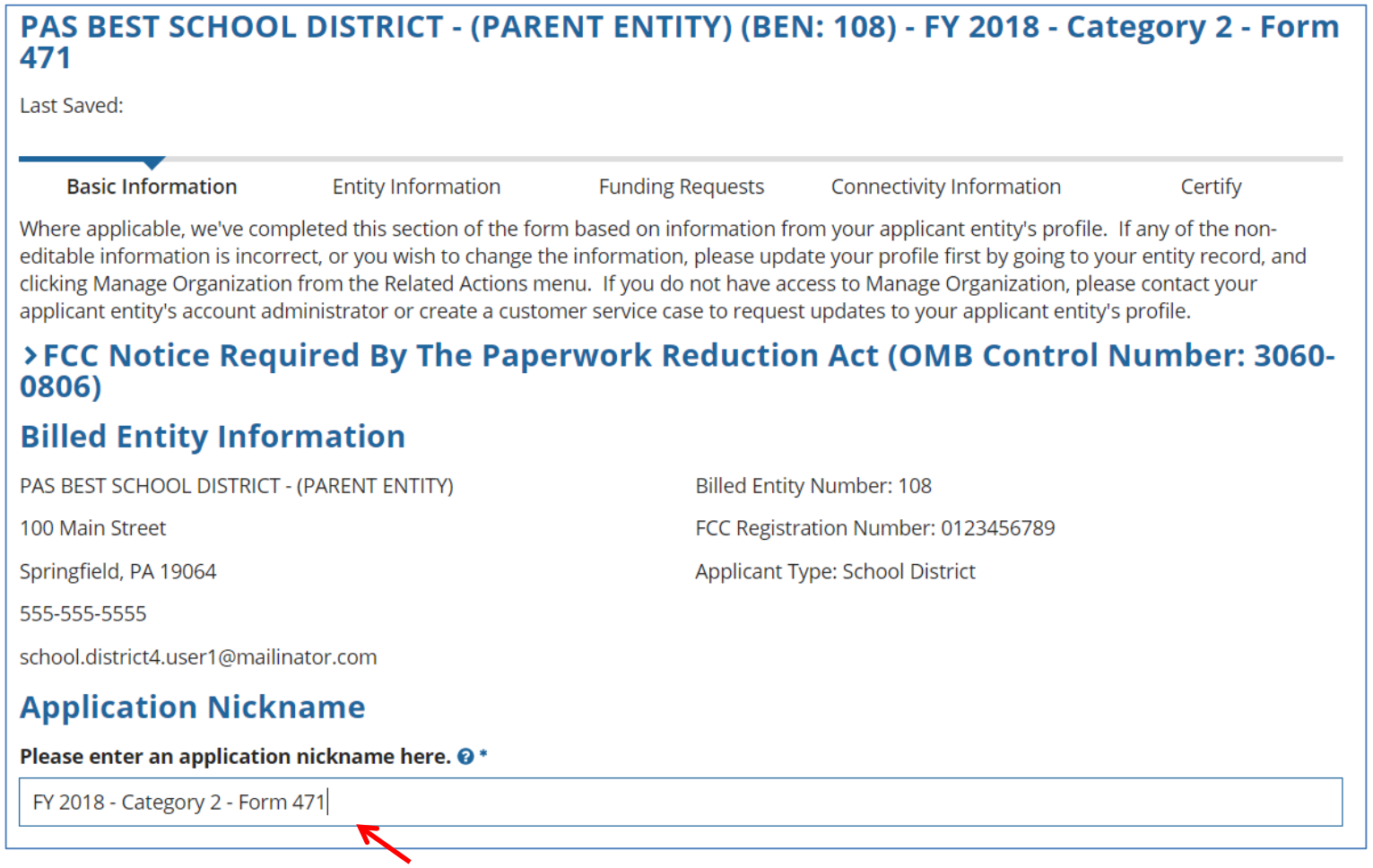
  - If data hasn't changed from last year, skip this step
  - If you added new schools or libraries in EPC since last year, you must answer their connectivity questions in EPC or the 471 won't allow you to submit
  - Connectivity Module Guide = http://e-ratepa.org/?p=24001

LET'S COMPLETE A FORM 471!

# From Your EPC Landing Page

- Log into EPC at: https://portal.usac.org/suite/
- From the Landing Page, select “FCC Form 471” in top right corner

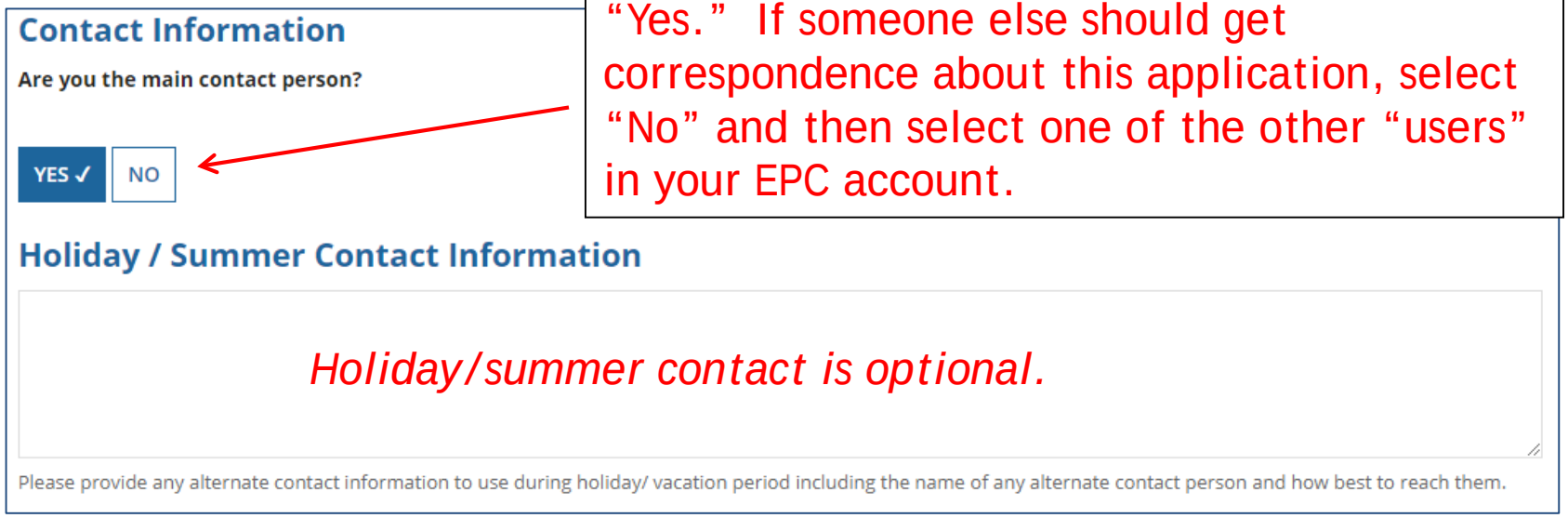
# Application Nickname



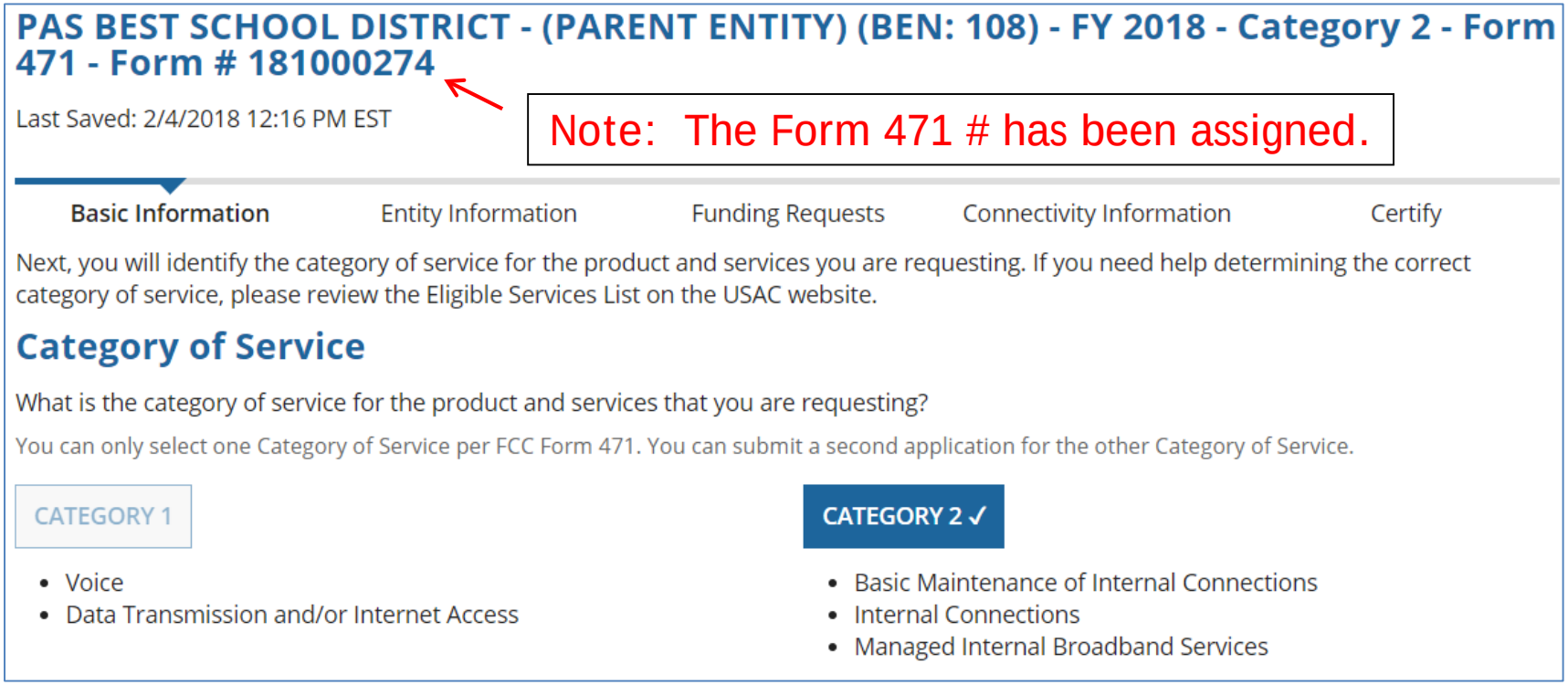

Enter a really descriptive nickname so you can easily find the form in your Task Bar later, such as “FY 2018 Category 2 Form 471.”

# Identifying Correct Contact Person

If you are the main contact person, select "Yes." If someone else should get correspondence about this application, select "No" and then select one of the other "users" in your EPC account.

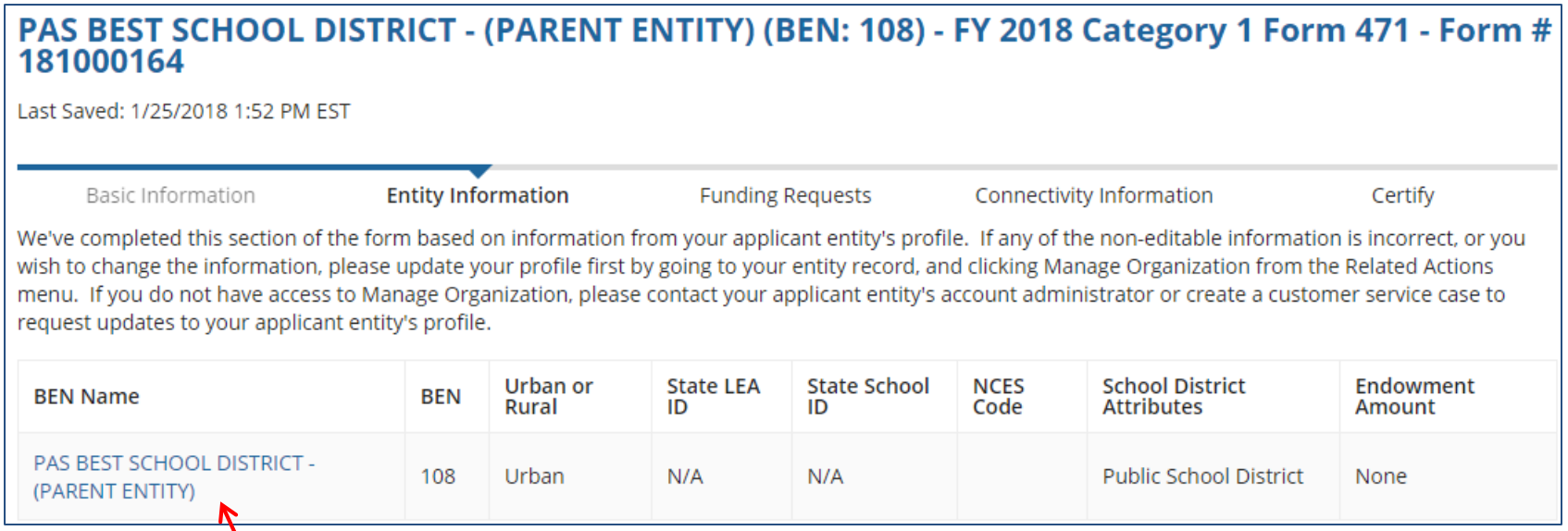


# Selecting Category 1 or Category 2




Select either "Category 1" or "Category 2."
For this Form 471 example, we are filing for Category 2 equipment.

# District Entity Information



**PAS BEST SCHOOL DISTRICT - (PARENT ENTITY) (BEN: 108) - FY 2018 Category 1 Form 471 - Form # 181000164**

Last Saved: 1/25/2018 1:52 PM EST

Basic Information | **Entity Information** | Funding Requests | Connectivity Information | Certify

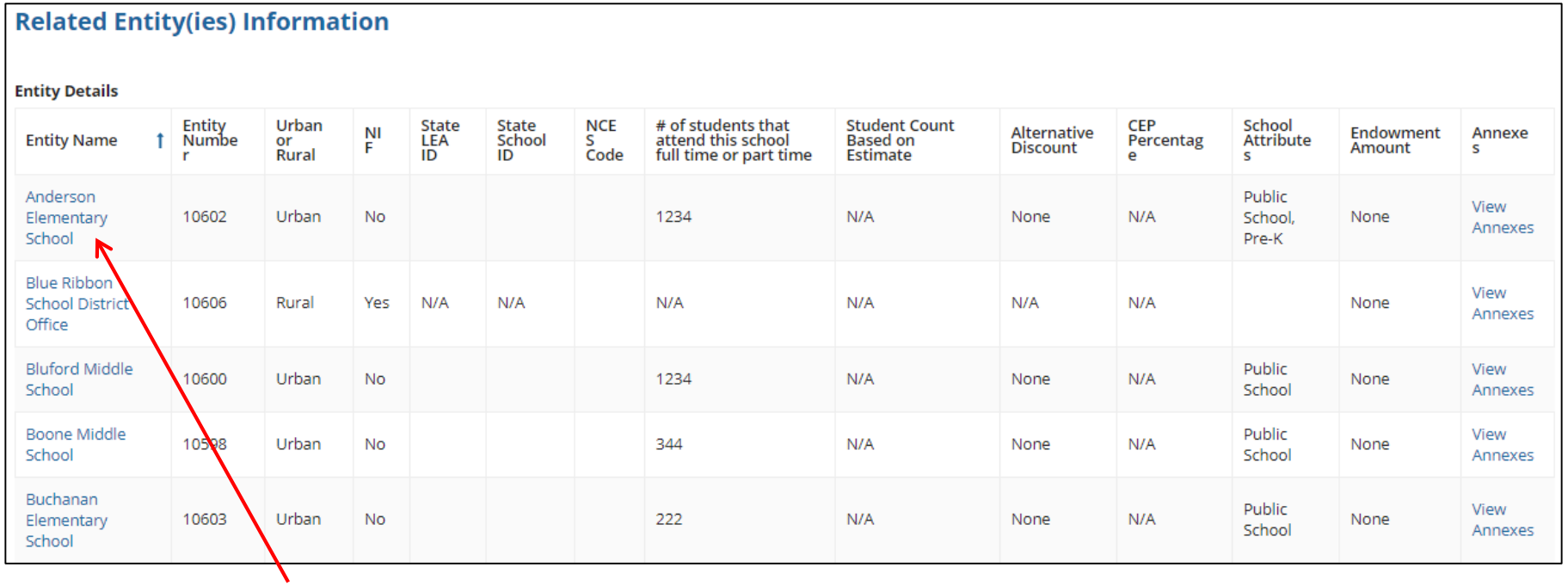
We've completed this section of the form based on information from your applicant entity's profile. If any of the non-editable information is incorrect, or you wish to change the information, please update your profile first by going to your entity record, and clicking Manage Organization from the Related Actions menu. If you do not have access to Manage Organization, please contact your applicant entity's account administrator or create a customer service case to request updates to your applicant entity's profile.

| BEN Name | BEN | Urban or Rural | State LEA ID | State School ID | NCES Code | School District Attributes | Endowment Amount |
|---|---|---|---|---|---|---|---|
| PAS BEST SCHOOL DISTRICT - (PARENT ENTITY) | 108 | Urban | N/A | N/A | | Public School District | None |

This page simply shows the information from EPC about your entity district or school.

Be careful NOT to click on the name of the district in blue because it will take you out of this Form 471 and into the District's EPC profile. If you do leave the application, just go to "My Tasks" on your EPC Landing Page and click on the 471 name to re-enter the application.

# School Entity Information



**Related Entity(ies) Information**

**Entity Details**

| Entity Name | Entity Number | Urban or Rural | NIF | State LEA ID | State School ID | NCES Code | # of students that attend this school full time or part time | Student Count Based on Estimate | Alternative Discount | CEP Percentage | School Attributes | Endowment Amount | Annexes |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Anderson Elementary School | 10602 | Urban | No | | | | 1234 | N/A | None | N/A | Public School, Pre-K | None | View Annexes |
| Blue Ribbon School District Office | 10606 | Rural | Yes | N/A | N/A | | N/A | N/A | N/A | N/A | | None | View Annexes |
| Bluford Middle School | 10600 | Urban | No | | | | 1234 | N/A | None | N/A | Public School | None | View Annexes |
| Boone Middle School | 10598 | Urban | No | | | | 344 | N/A | None | N/A | Public School | None | View Annexes |
| Buchanan Elementary School | 10603 | Urban | No | | | | 222 | N/A | None | N/A | Public School | None | View Annexes |

This page shows discount-related data that was entered into each school's EPC profile.

Again, be careful not to click on the school's name in blue because you will be taken out of this Form 471 and into that school's EPC profile.

# District E-rate Discounts

## Requested Discount Calculation

**More than 50 percent of your individual schools must be rural for the school district to be considered rural.**

This discount rate has not been approved for the current year

| School District Full-time Enrollment | School District NSLP Count | School District NSLP Percent | School District Urban/Rural Status | Category One Discount Rate | Category Two Discount Rate | Voice Discount Rate |
|---|---|---|---|---|---|---|
| 5844 | 5107 | 87% | Urban | 90% | 85% | 10% |

SHOW ENTITIES

This page shows your discount for each category of service.

Notice, the maximum C2 discount rate is 85%, even though the C1 discount is 90%. In all other cases, C1 and C2 will be identical (except voice, of course).

# Discount Calculation Errors...

Although this shouldn't happen for FY 2018, if you receive a red box showing this discount calculation error:

it's because data is missing from one or more of you school's EPC profiles and must be corrected.

If you receive this message, contact USAC at 888-203-8100 immediately so they can fix the underlying data which will then allow your application to proceed.

Note: There is no way for you to fix this yourself because the entity profiles have been locked.
Also, please let me know if you receive this message.

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Although this shouldn't happen for FY 2018, if you receive a red box showing this discount calculation error:

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Also, please let me know if you receive this message.

# Creating Your Funding Requests

- There are two required elements to each funding request:
  1. FRN Key Information
     - Indicates if it's for internal connections, MIBS, or maintenance
     - Links to the relevant contract (or indicates it's MTM service)
     - Describe FRN in narrative box
  2. FRN Line Item(s)
     - Must have separate line items for each new component
     - Gives details about the component/service
     - Identifies which schools are receiving equipment
     - Provides cost data for each line item

# Creating Funding Requests (FRNs)

Get there quickly…

- Wireless equipment example – slide 19
  - Wireless access points (site specific equipment)
  - Controller (shared equipment used by multiple schools)
- Switches example– slide 52 (site specific equipment)
- Structured cabling example - slide 75
  - Internal wiring/installation (site specific equipment)

# Example 1:
# Wireless Equipment

## Wireless Access Points (site specific)

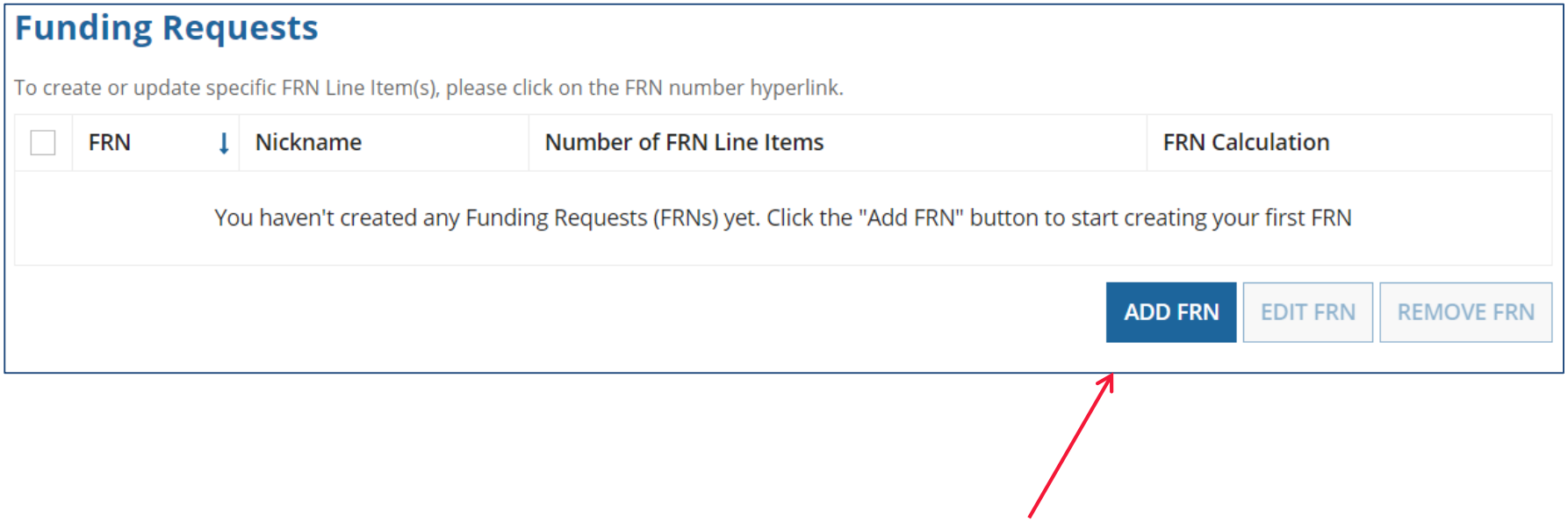
## Wireless Controller (shared)

# FRN Example 1: Wireless Equipment

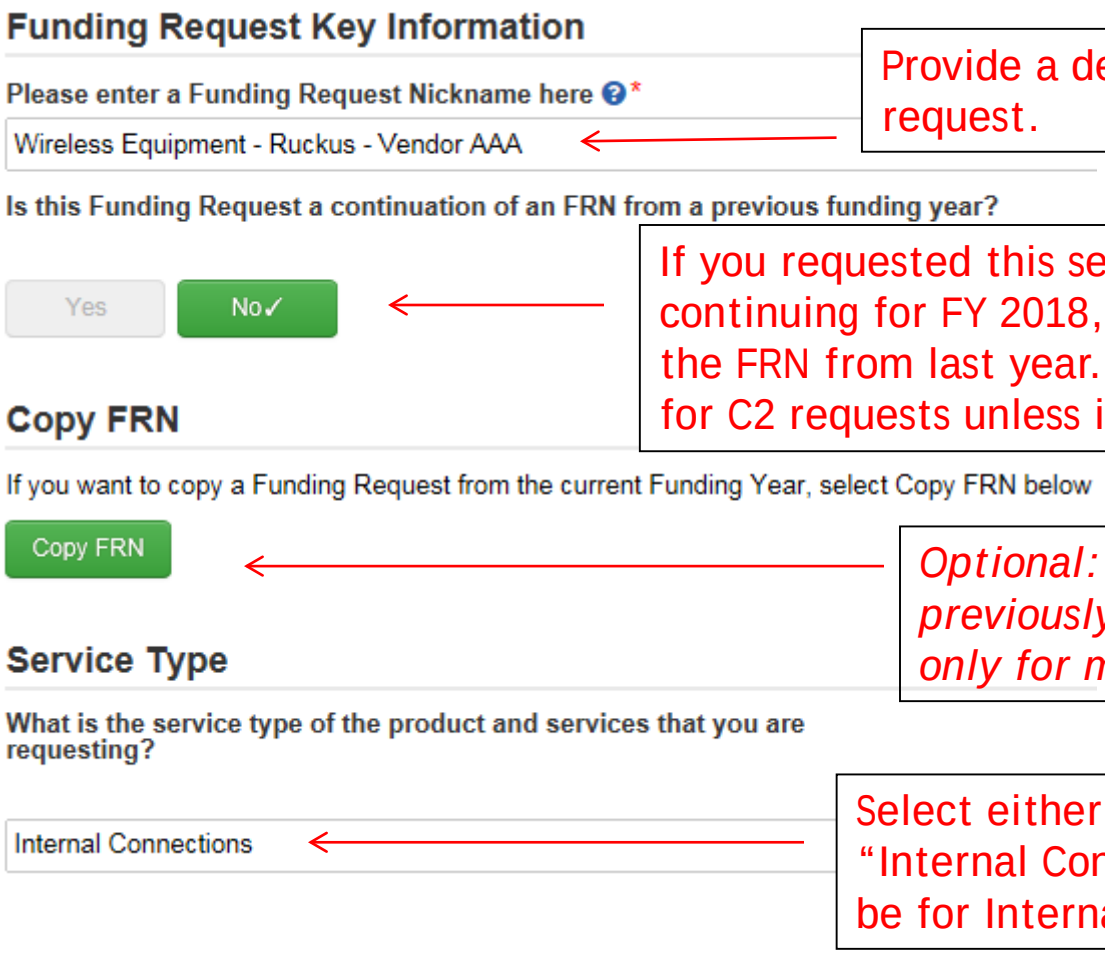
- Assumptions:
  - Contracted service (all C2 must be contracted)
  - 2 FRN line items: WAPs and Wireless Controller
  - WAPs:
    - 60 WAPs at $565.00 each
    - Jacksonville School – 10 @ $565 = $5650
    - Plainfield School – 20 @ $565 = $11,300
    - Franklin School – 30 @ $565 = $16,950
  - Wireless Controller:
    - $30,000
    - Shared by 3 schools
    - Weighted cost allocated by % student enrollment (not by # of schools such as 1/3, 1/3, 1/3)

# Adding a Funding Request

This is the main FRN page, not to be confused with the FRN Line Item Page. You will add your funding requests one by one on this page.



# Funding Request Key Information



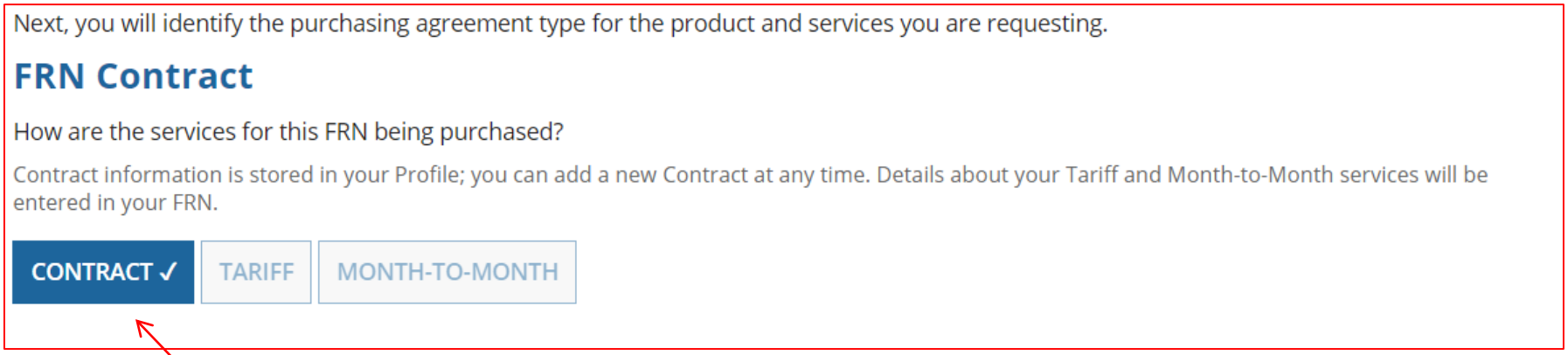

Provide a descriptive nickname for each funding request.

If you requested this service last year and the contract is continuing for FY 2018, you may select "Yes" and supply the FRN from last year. If not, select "No." Likely "No" for C2 requests unless it's for maintenance.

*Optional: Use this option to retrieve previously filed FRN in EPC – likely useful only for multi-year maintenance contract.*

Select either "Basic Maintenance" or "Internal Connections" or "MIBS." Most C2 will be for Internal Connections.

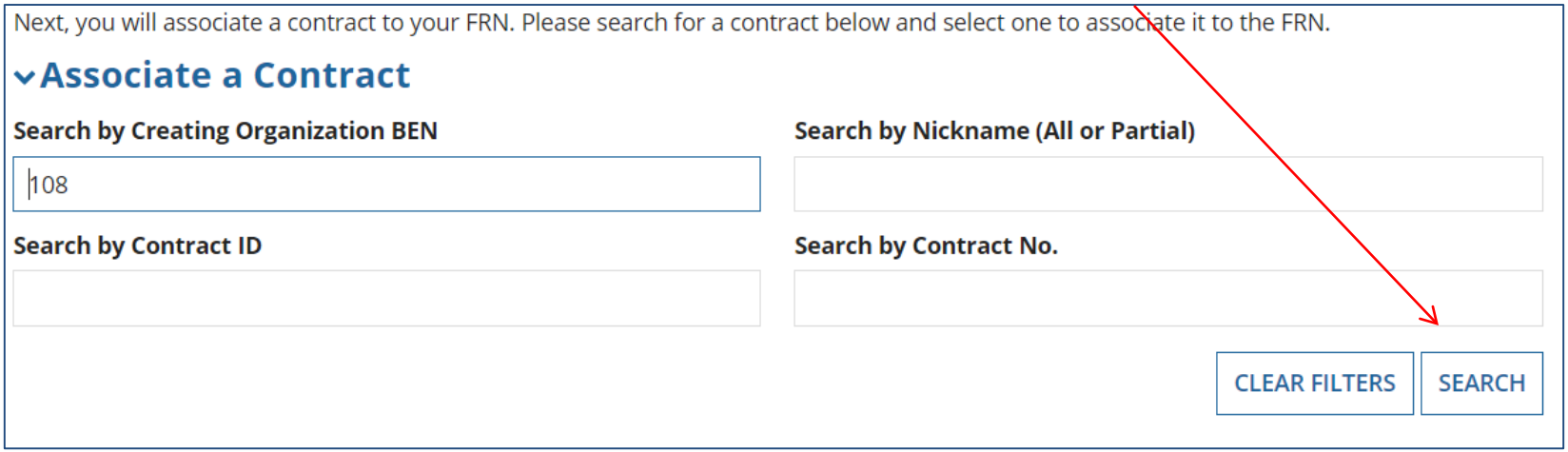
# Contract vs. MTM




Select "Contract" for all Category 2 funding requests.

# Linking to a Contract

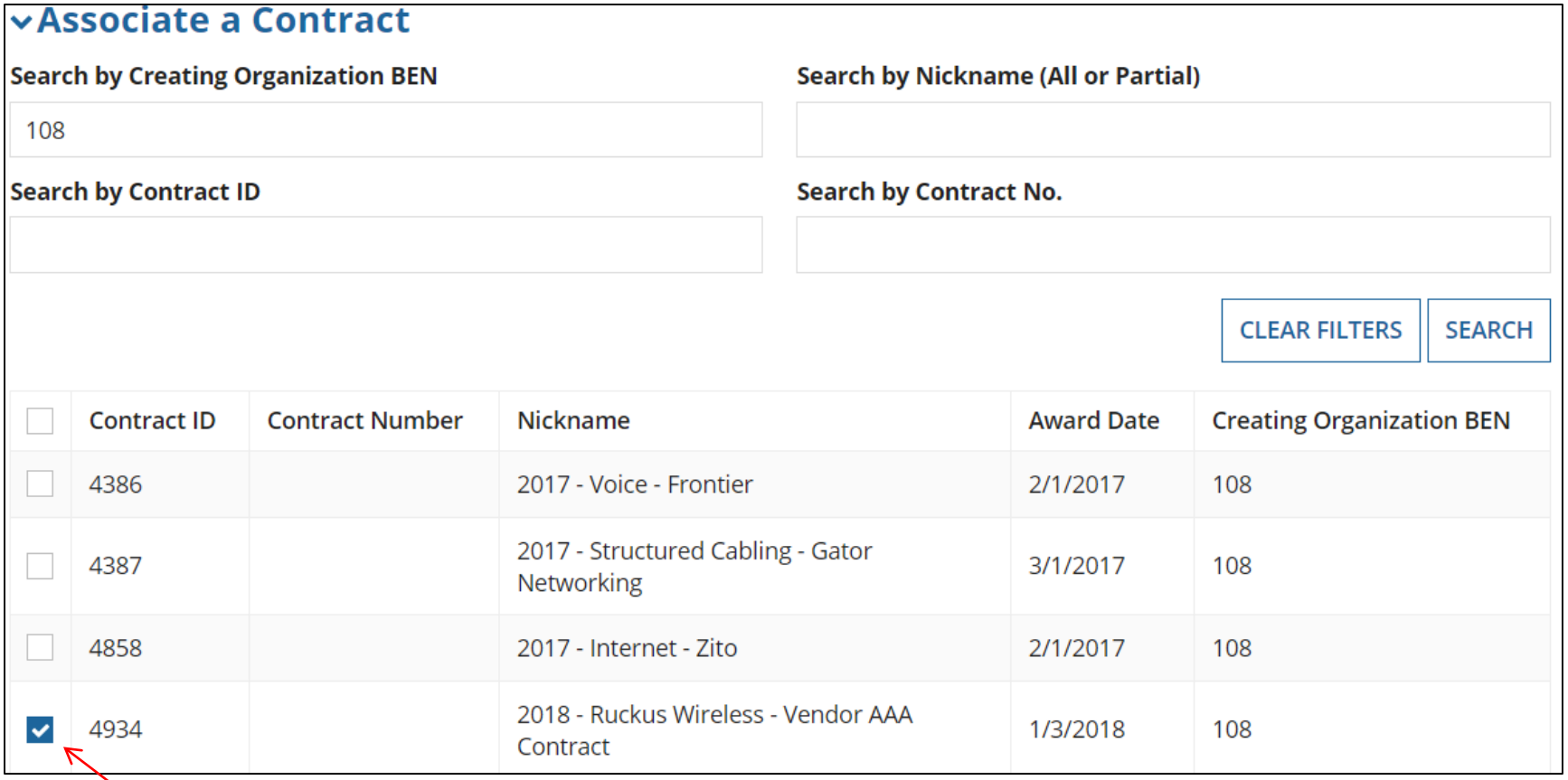
Click “Search” to see all your contracts listed.




Since “Contract” was selected on the previous screen, you will be prompted to search for all of the contracts you have entered in the EPC Contract Module.

You must have your Contract Records created in your EPC portal in order for this to work. If you have not yet created your CR’s, in a separate tab, go to > Landing Page > District Name > Contracts from top menu bar > Manage Contracts > Add New Contract.

# Choosing the Appropriate Contract




After clicking "Search," you will see all of the contracts you entered in EPC. Select the correct contract that should be linked to this funding request.

# Linking to a Contract

## Contract Summary - 2018 - Ruckus Wireless - Vendor AAA Contract

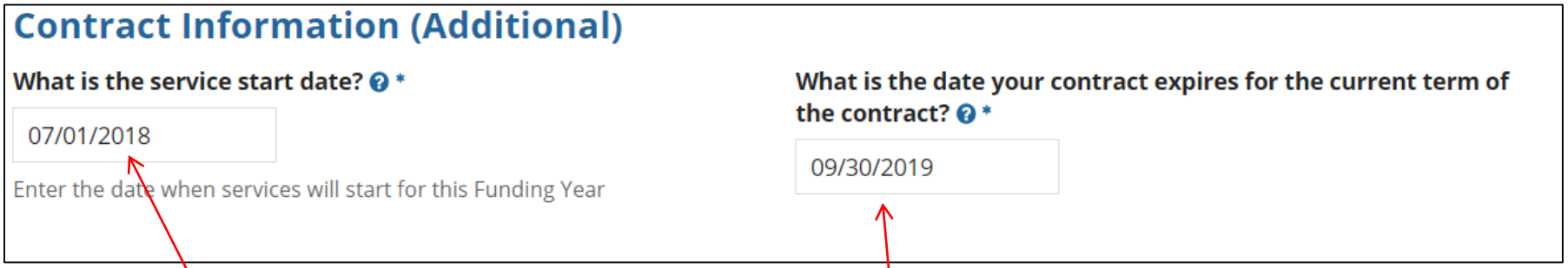
| | | | |
|---|---|---|---|
| **Contract Number** | | **Account Number** | |
| **Establishing FCC Form 470** | #180000205 | **Service Provider** | FCC Service Provider Organization 1 (SPIN: 14020001) |
| **Award Date** | 1/3/2018 | **Includes Voluntary Extensions?** | No |
| **Expiration Date (All Extensions)** | | **Remaining Voluntary Extensions** | |
| | | **Total Remaining Contract Length** | |

### Pricing Confidentiality

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

After selecting the correct contract, you will see a summary of the contract information from EPC.

# Entering Service Start and Contract Expiration Dates

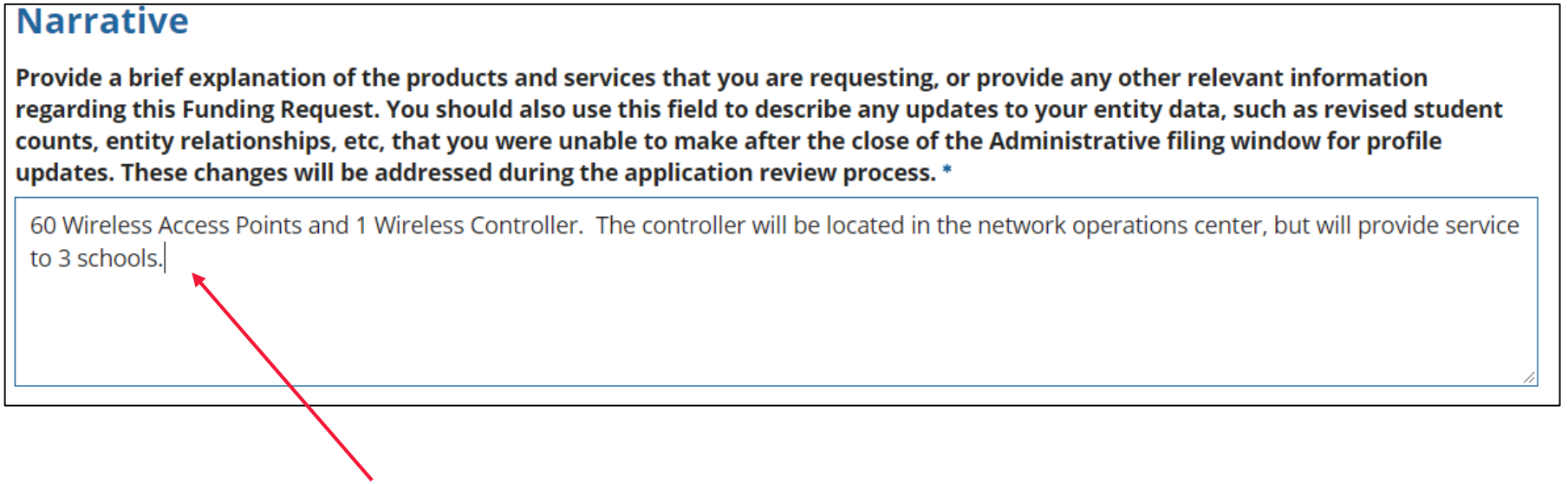



**Service Start Date:**
The system will automatically enter 7/1/2018 as SSD.

Note: In previous years, you listed this as 4/1/20xx – these should always be listed now as 7/1/20xx.

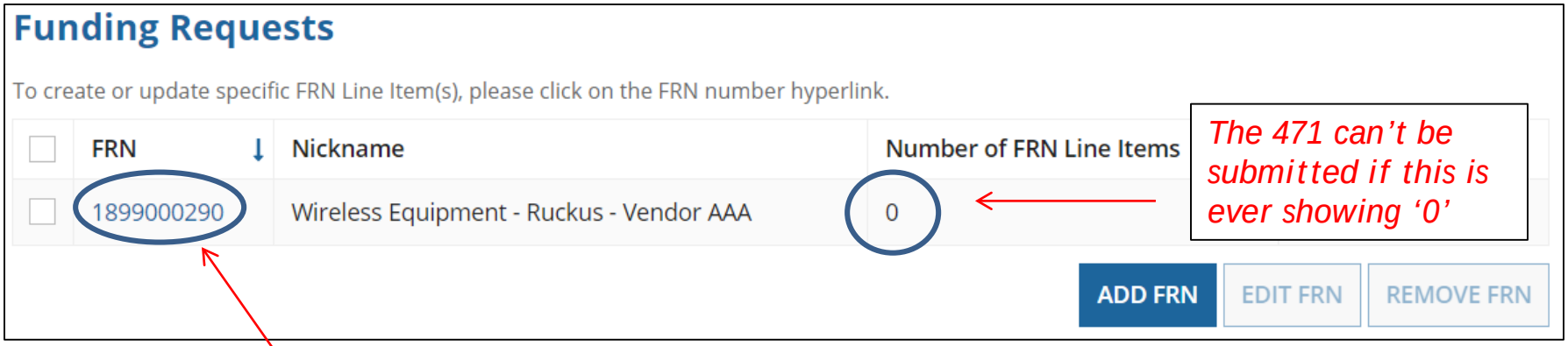
**Contract Expiration Date:**
You will need enter the CED for this contract, which is likely 9/30/2019 for Category 2 equipment contracts.

# FRN Narrative Box




Provide a brief narrative that will give enough details so your PIA reviewer understands the services you are requesting. Something like, "60 *Wireless Access Points and 1 Wireless Controller. The controller will be located in the network operations center, but will provide service to 3 schools*."

# Adding FRN Line Items



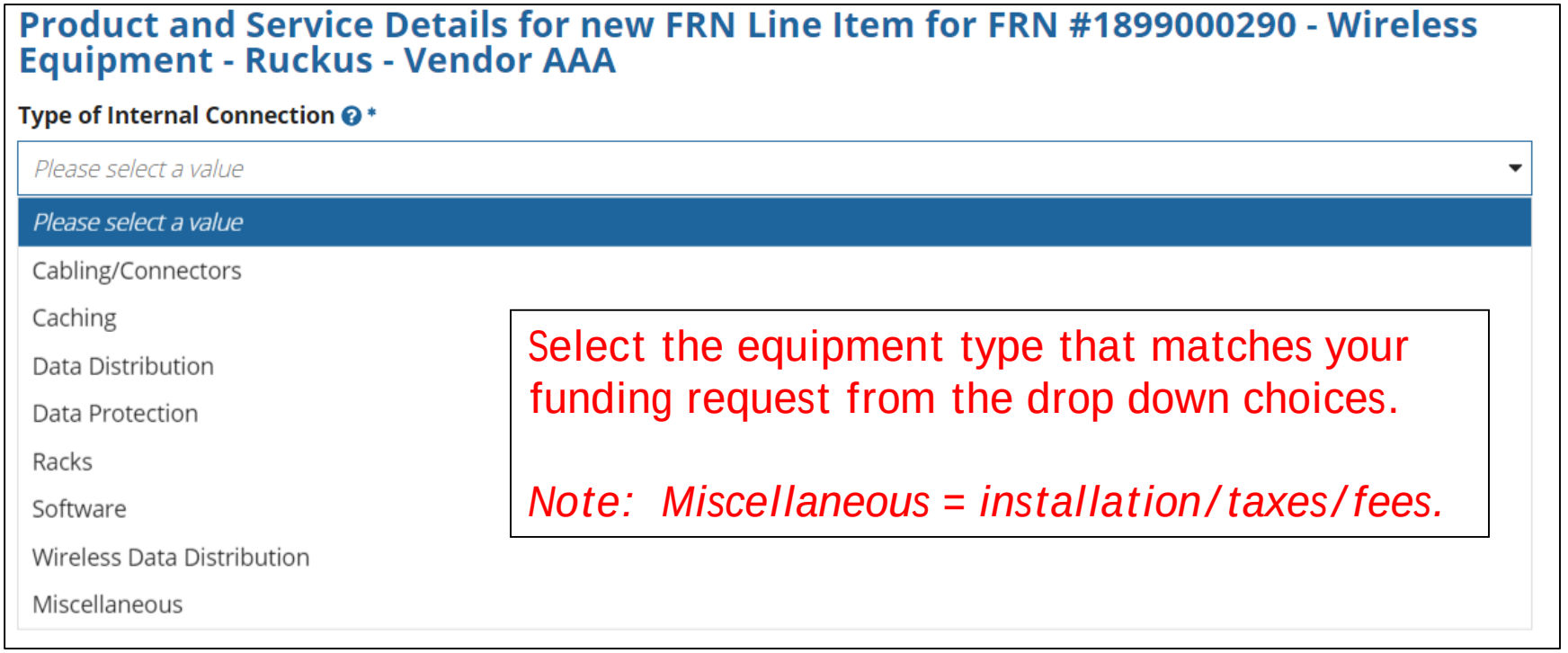

This is the Main FRN Page. The next step is to add an FRN Line Item(s).

Click the blue FRN number to add an FRN Line Item which will provide additional details and costs for this funding request.

# Adding a FRN Line Item - WAPs

Select "Add New FRN Line Item."

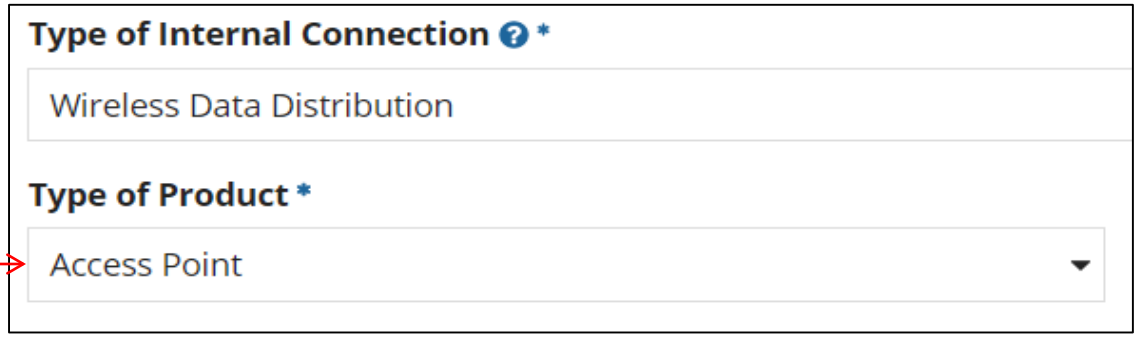
# Adding a Line Item – Type of IC



# Adding a Line Item – Type of Product

The "Type of Product" choices change depending on the Type of IC was selected.

Generally, here are the options:



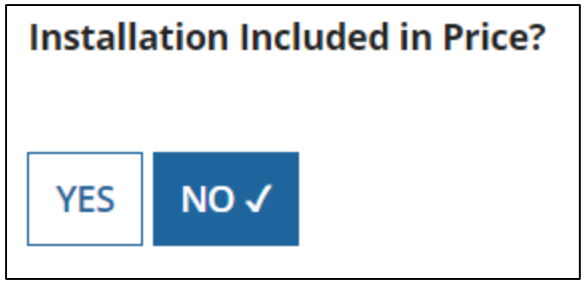

| If This Type of Internal Connection... | Then These Are the Options for Type of Product |
|---|---|
| Cabling/Connectors | Cabling/Connectors |
| Caching | Caching Service, Equipment |
| Data Distribution | Routers, Switches |
| Data Protection | Firewall, UPS |
| Racks | Racks/Cabinets |
| Software | Operating System Software |
| Wireless Data Distribution | WAPS, Antenna, Controllers |
| Miscellaneous | Installation, Training and Taxes |

# Listing Make/Model Number

The "Make" is the manufacturer's name and there is a long list to choose from. Use "Other" if your manufacturer isn't listed, and then type-in the name.

The "Model" should be the manufacturer's SKU or Model Number – not a description.

# Installation/Leasing Questions




Select "No" if installation is not bundled with this FRN line item, or if installation is listed on a separate FRN Line Item, or if installation is not included on your contract.

Select "Yes" if this is an FRN line item just for installation, or if installation is BUNDLED in with the price for this FRN line item.

If you are leasing the equipment (as opposed to purchasing it), select "Yes." The most common answer will be "No."

# Entering Unit Costs/Quantity

If this line item is for equipment purchases, enter $0's in the monthly recurring cost column.

For equipment purchases/installation, list the cost/unit for this FRN Line Item.

List the # of units.

| Monthly Cost | |
|---|---|
| Monthly Recurring Unit Cost | $0.00 |
| Monthly Recurring Unit Ineligible Costs | $0.00 |
| Monthly Recurring Unit Eligible Costs | = $0.00 |
| Monthly Quantity | 0 |
| Units | Each |
| Total Monthly Eligible Recurring Costs | = $0.00 |
| Months of Service | x 12 |
| Total Eligible Recurring Costs | = $0.00 |

| One-Time Cost | |
|---|---|
| One-time Unit Cost | $565.00 |
| One-time Ineligible Unit Cost | $0.00 |
| One-time Eligible Unit Cost | = $565.00 |
| One-time Quantity | 60 |
| Total Eligible One-time Costs | = $33,900.00 |

| Summary | |
|---|---|
| Total Eligible Recurring Costs | $0.00 |
| Total Eligible One-time Costs | + $33,900.00 |
| Pre-Discount Extended Eligible Line Item Cost | = $33,900.00 |

# Identifying Recipients of Equipment for this Line Item

**Is every entity for this organization receiving service?**

YES | NO ✓

Select "Yes" if all buildings are receiving equipment or sharing equipment. Select "No" if only one or some buildings are receiving/using the equipment.

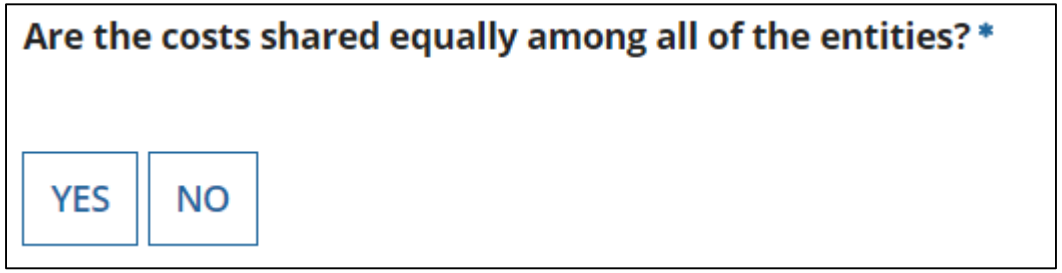
| | BEN | BEN Name |
|---|---|---|
| ☑ | 109 | Plainfield Elementary School |
| ☑ | 110 | Jacksonville Jr/Sr High School |
| ☐ | 10597 | Gallaudet Elementary School |
| ☑ | 10598 | Boone Middle School |
| ☐ | 10599 | Franklin High School |
| ☐ | 10600 | Bluford Middle School |
| ☐ | 10601 | Guggenheim Elementary School |
| ☐ | 10602 | Anderson Elementary School |
| ☐ | 10603 | Buchanan Elementary School |
| ☐ | 10604 | Ross Elementary School |

**1 – 10** of 11

If you selected "No," you are then prompted to select/check the buildings receiving the equipment/service. Then click "Add."

ADD

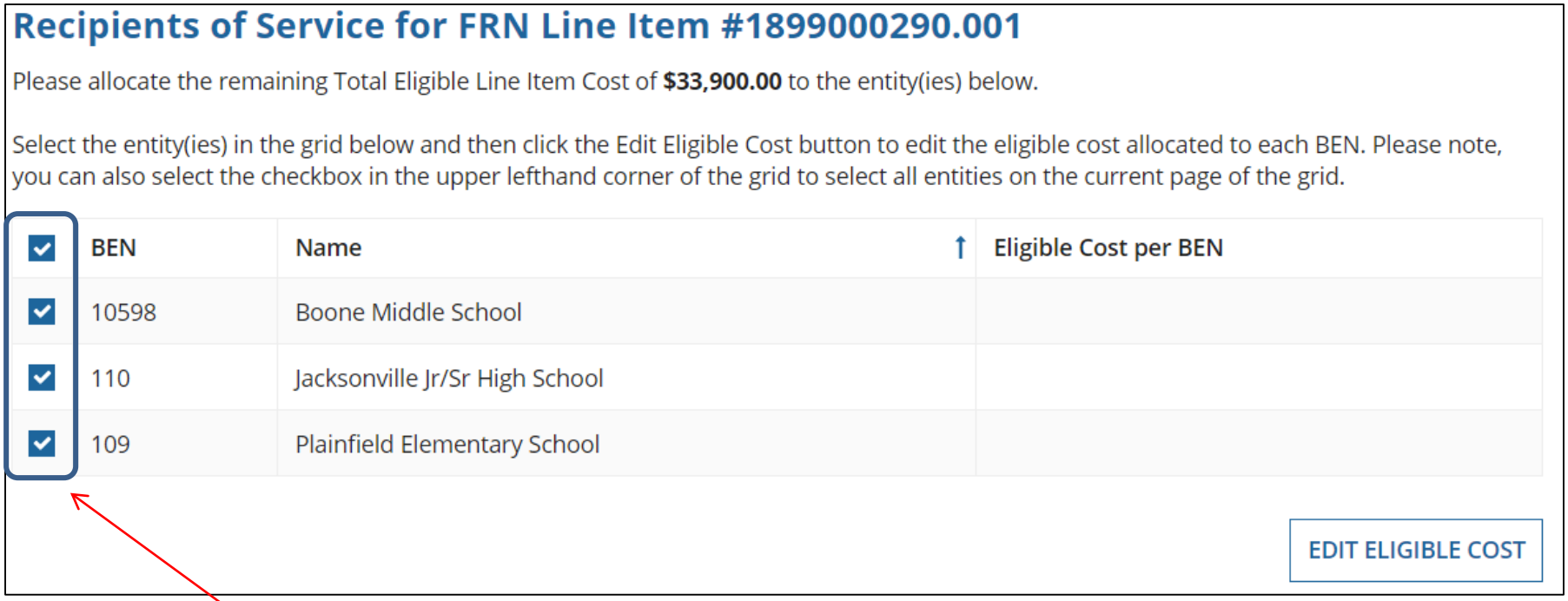
# Important Question!!!




If you answer "Yes" the system will split the costs of this line item equally among the schools you selected from the previous list.

Unless the quantities are identical per school, do **not** want to choose this option. Instead, select "No" and the system will allow you to enter the appropriate costs per school.

# Assigning Eligible Costs/Building



## Recipients of Service for FRN Line Item #1899000290.001

Please allocate the remaining Total Eligible Line Item Cost of **$33,900.00** to the entity(ies) below.

Select the entity(ies) in the grid below and then click the Edit Eligible Cost button to edit the eligible cost allocated to each BEN. Please note, you can also select the checkbox in the upper lefthand corner of the grid to select all entities on the current page of the grid.

| | BEN | Name ↑ | Eligible Cost per BEN |
|---|---|---|---|
| ☑ | 10598 | Boone Middle School | |
| ☑ | 110 | Jacksonville Jr/Sr High School | |
| ☑ | 109 | Plainfield Elementary School | |

EDIT ELIGIBLE COST

Check each school, then "Edit Eligible Cost" to assign the pre-discount amount to each school.

# Allocating Costs/School

You can now allocate the costs for each school that was selected as a recipient of the equipment. The amounts allocated to the schools must add up to the total amount of the line item.

## Edit Eligible Cost Allocated to the Recipient(s)

Please allocate the remaining Total Eligible Line Item Cost of **$33,900.00**

**1. Plainfield Elementary School (BEN: 109)**

$5,650.00

**2. Jacksonville Jr/Sr High School (BEN: 110)**

$11,300.00

**3. Boone Middle School (BEN: 10598)**

$16,950.00

Note: The system never asks for th # of units for each school. It asks for the total pre-discount cost by school. You must do the math offline to calculate the costs per school.

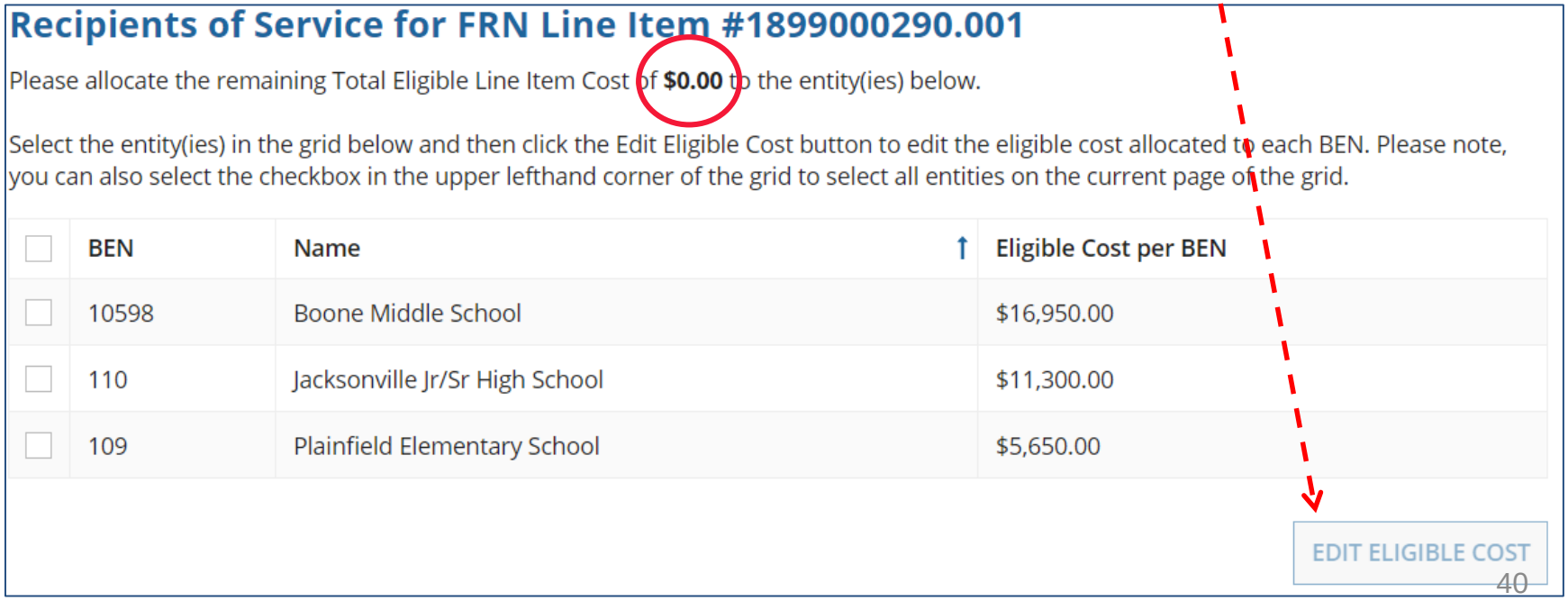
| OFFLINE MATH: | # WAPs | Cost/WAP | Cost/School |
|---|---|---|---|
| Plainfield Elem | 10 | $565 | $5,650.00 |
| Jacksonville Jr Hs | 15 | $565 | $11,300.00 |
| Franklin HS | 30 | $565 | $ 16,950.00 |
| **TOTAL** | 60 | | $33,900.00 |

The total here should equal the total prediscount amount for the line item.

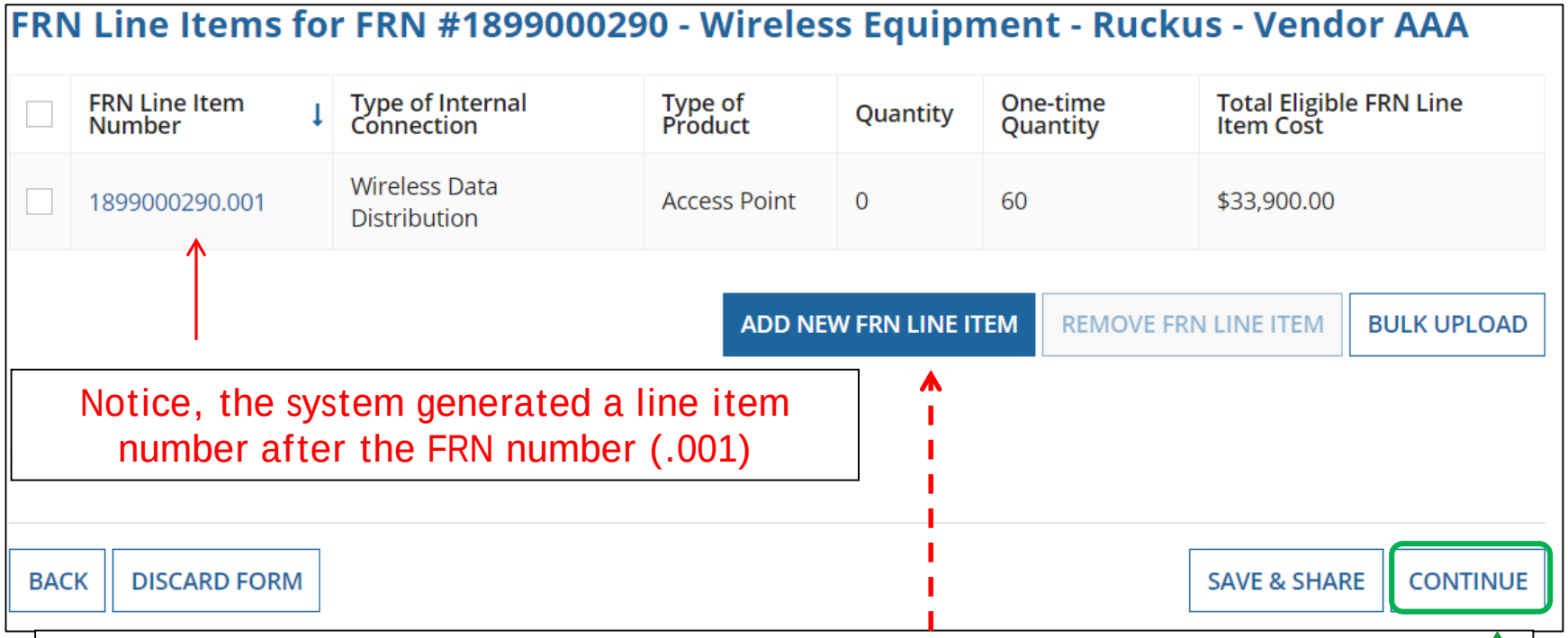
# Balancing to $0.00

After you have entered the amounts/building, the "amount remaining" should balance out to $0.00.

- If the remaining cost is just a few cents, it's likely due to a rounding issue, and you should return to the previous screen and add or subtract a few pennies from one of the allocations.
- If the remaining cost is more than a few cents, it's because there is an error in your offline math and you should double-check your figures and click on "Edit Eligible Cost" to make corrections.



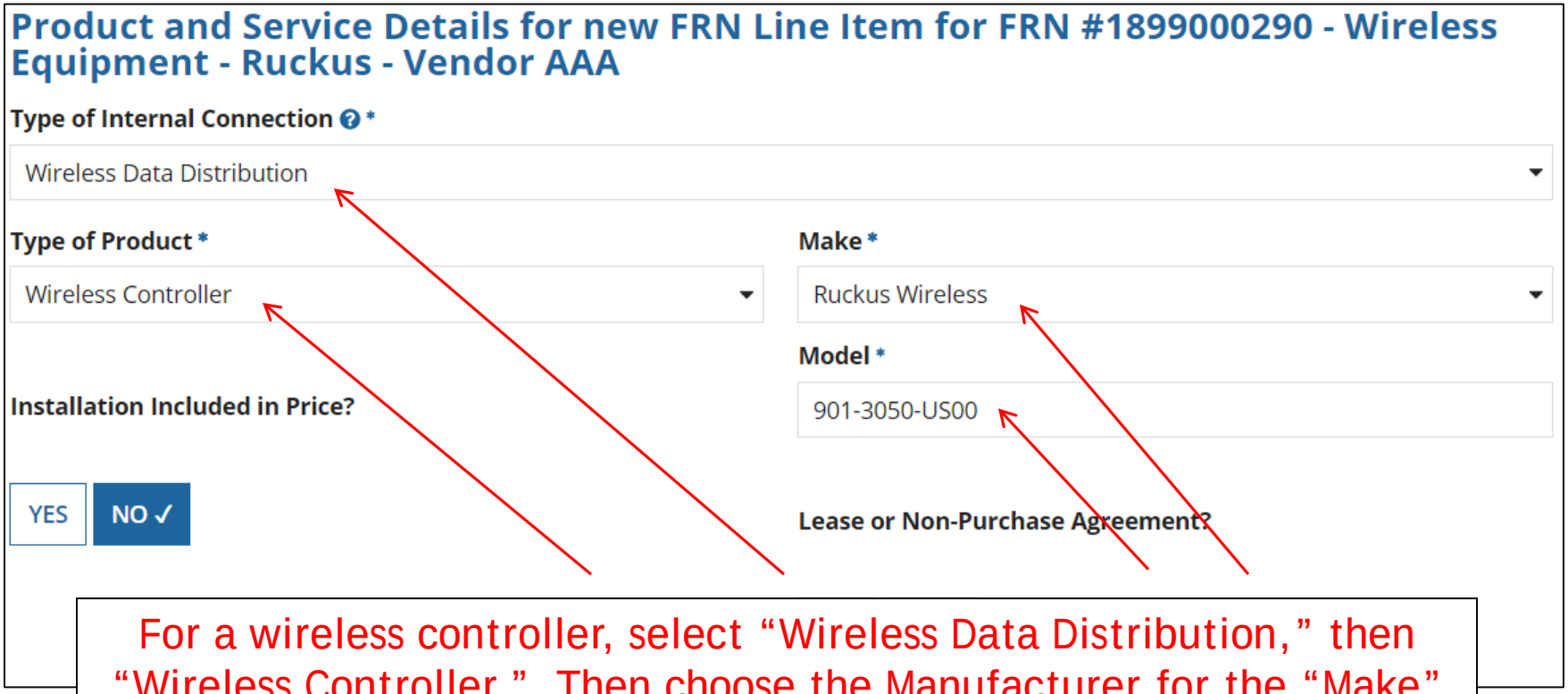
# FRN Line Item Page: Adding an Additional FRN Line Item




If you have more line items for this FRN, click here to add an additional FRN Line Item. In this example, we will add a new FRN Line Item to add the Wireless Controller to the FRN.

If you have entered all of your FRN Line Items/Costs, click "**Continue**" to return to the main FRN page.

# Adding a Wireless Controller Line Item




For a wireless controller, select "Wireless Data Distribution," then "Wireless Controller." Then choose the Manufacturer for the "Make" (use "Other" if your manufacturer isn't listed).

The "Model" should be the manufacturer's SKU or Model Number – not a description.

# Entering Unit Costs/Quantity

If this line item is for equipment purchases, enter $0's in the monthly recurring cost column.

For equipment purchases/installation, list the cost/unit for this FRN Line Item.

List the # of units.

| Monthly Cost | |
|---|---|
| Monthly Recurring Unit Cost | $0.00 |
| Monthly Recurring Unit Ineligible Costs | $0.00 |
| Monthly Recurring Unit Eligible Costs | = $0.00 |
| Monthly Quantity | 0 |
| Units | Each |
| Total Monthly Eligible Recurring Costs | = $0.00 |
| Months of Service | x 12 |
| Total Eligible Recurring Costs | = $0.00 |

| One-Time Cost | |
|---|---|
| One-time Unit Cost | $30,000.00 |
| One-time Ineligible Unit Cost | $0.00 |
| One-time Eligible Unit Cost | = $30,000.00 |
| One-time Quantity | 1 |
| Total Eligible One-time Costs | = $30,000.00 |

| Summary | |
|---|---|
| Total Eligible Recurring Costs | $0.00 |
| Total Eligible One-time Costs | + $30,000.00 |
| Pre-Discount Extended Eligible Line Item Cost | = $30,000.00 |

# Identifying Recipients of Equipment for this Line Item

**Is every entity for this organization receiving service?**

YES | NO ✓

Select "Yes" if all buildings are receiving equipment or sharing equipment. Select "No" if only one or some buildings are receiving/using the equipment.

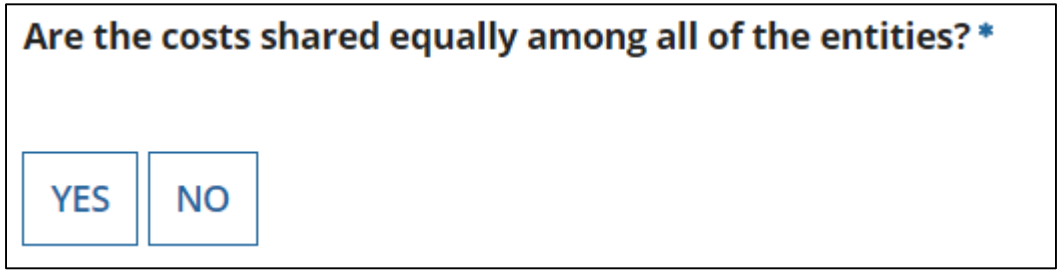
| | BEN | BEN Name |
|---|---|---|
| ☑ | 109 | Plainfield Elementary School |
| ☑ | 110 | Jacksonville Jr/Sr High School |
| ☐ | 10597 | Gallaudet Elementary School |
| ☑ | 10598 | Boone Middle School |
| ☐ | 10599 | Franklin High School |
| ☐ | 10600 | Bluford Middle School |
| ☐ | 10601 | Guggenheim Elementary School |
| ☐ | 10602 | Anderson Elementary School |
| ☐ | 10603 | Buchanan Elementary School |
| ☐ | 10604 | Ross Elementary School |

**1 – 10** of 11

If you selected "No," you are then prompted to select/check the buildings receiving the equipment/service. Then click "Add."

ADD

# Important Question!!!

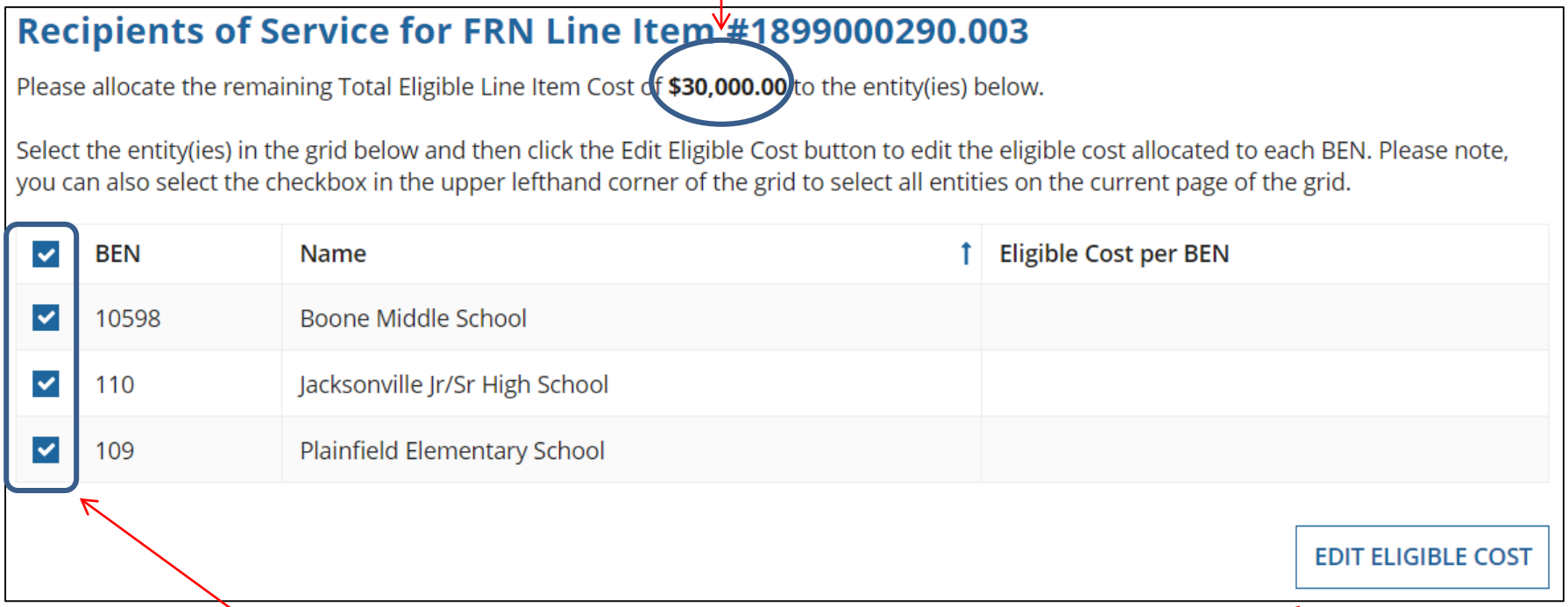



If you answer "Yes" the system will split the costs of this line item equally among the schools you selected from the previous list.

Unless the quantities are identical per school, do **not** want to choose this option. Instead, select "No" and the system will allow you to enter the appropriate costs per school.

# Assigning Eligible Costs/Building

This is the total amount of this FRN Line Item that must be allocated among these entities.




Check each school, then "Edit Eligible Cost" to assign the pre-discount amount to each school.

# Weighted Allocation for Shared Equipment

- 3 options for weighted allocations:
  1) **By % of enrollment**
     - Take total enrollment for all schools being served by equipment
     - Divide school enrollment by total enrollment to obtain % enrollment for that school
     - Multiple school % enrollment by total cost of equipment
  2) **By % usage**
  3) **Other:** Another method that you develop that is defendable/logical

| OFFLINE MATH | Enrollment | % Enrollment | % Enrollment x Cost of Shared Equipment |
|---|---|---|---|
| Plainfield Elem | 225 | 0.21 | $ 6,355.93 |
| Jacksonville Jr HS | 256 | 0.24 | $ 7,231.64 |
| Boone MS | 581 | 0.55 | $ 16,412.43 |
| | 1062 | | $ 30,000.00 |

| OFFLINE MATH | # of WAPs in School | % WAP Usage | % WAP Usage x Total Cost of Shared Equipment |
|---|---|---|---|
| Plainfield Elem | 55 | 0.23 | $ 7,021.28 |
| Jacksonville Jr Hs | 65 | 0.28 | $ 8,297.87 |
| Boone MS | 115 | 0.49 | $ 14,680.85 |
| | 235 | | $ 30,000.00 |

# Allocation of Costs Per School by % Enrollment

You must now allocate the costs for each recipient/user of equipment to match the line item total.

## Edit Eligible Cost Allocated to the Recipient(s)

Please allocate the remaining Total Eligible Line Item Cost of **$30,000.00** to the entity(ies) below.

**1. Plainfield Elementary School (BEN: 109)**

$6,355.93

**2. Jacksonville Jr/Sr High School (BEN: 110)**

$7,231.64

**3. Boone Middle School (BEN: 10598)**

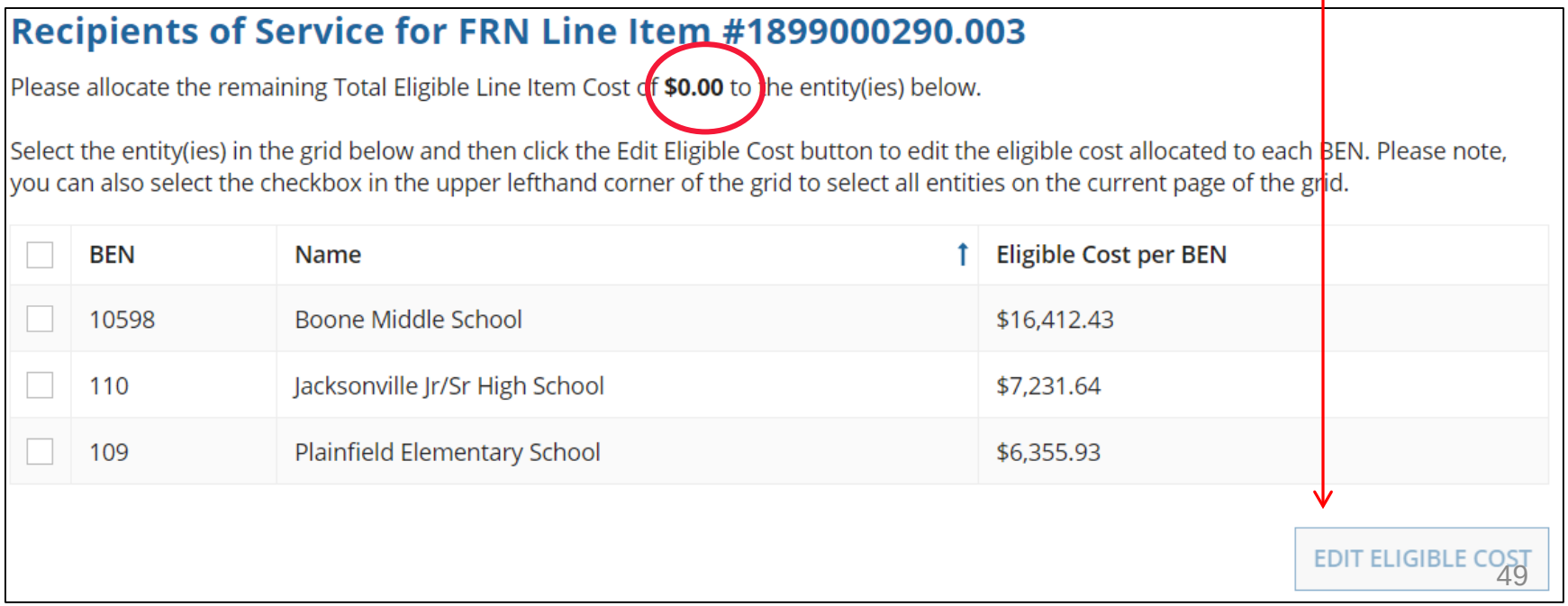
$16,412.43

| OFFLINE MATH | Enrollment | % Enrollment | % Enrollment x Cost of Shared Component |
|---|---|---|---|
| Plainfield Elem | 225 | 0.21 | $ 6,355.93 |
| Jacksonville Jr HS | 256 | 0.24 | $ 7,231.64 |
| Boone MS | 581 | 0.55 | $ 16,412.43 |
| | 1062 | | $ 30,000.00 |

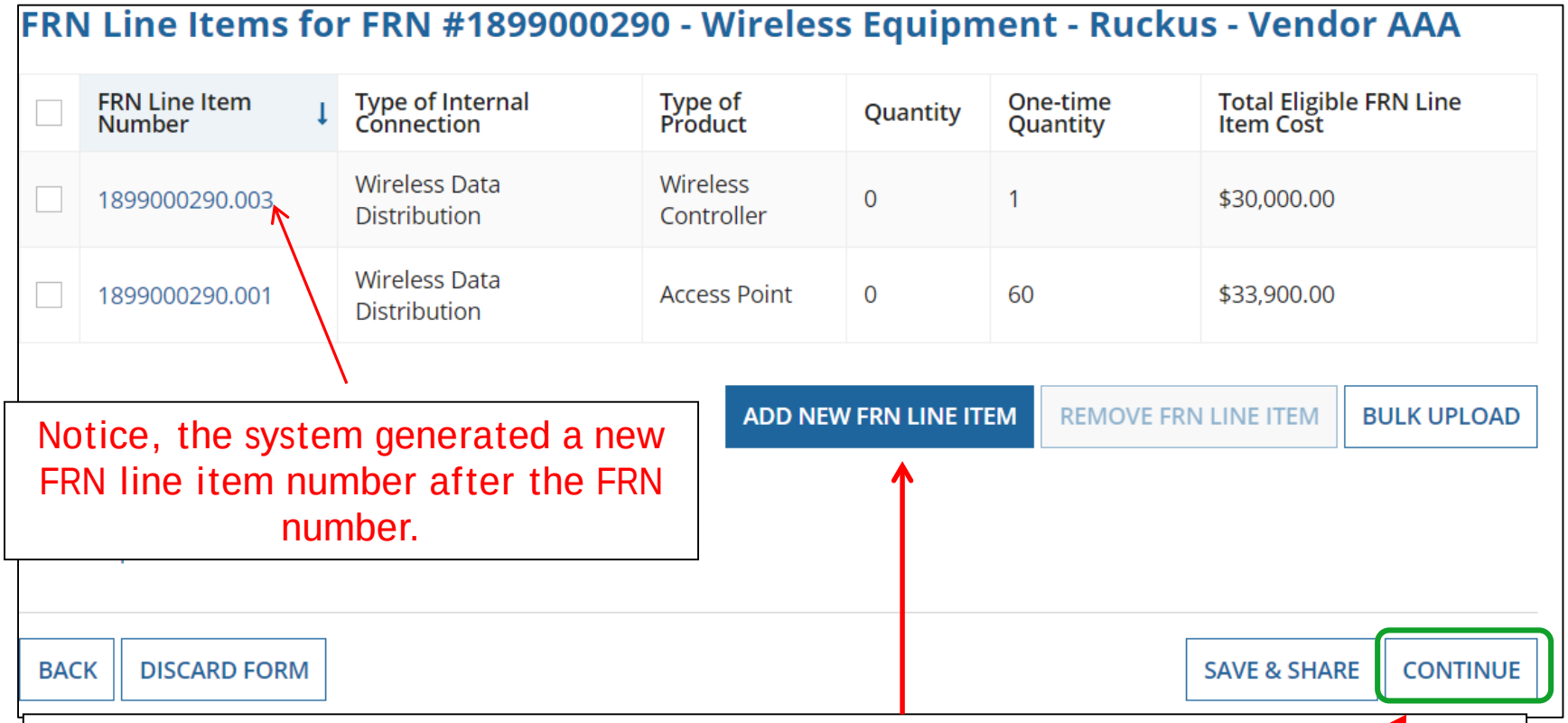
# Balancing to $0.00

After you have entered the amounts/building, the "amount remaining" should balance out to $0.00.

- If the remaining cost is just a few cents, it's likely due to a rounding issue, and you should return to the previous screen and add or subtract a few pennies from one of the allocations.
- If the remaining cost is more than a few cents, it's because there is an error in your offline math and you should double-check your figures and click on "Edit Eligible Cost" to make corrections.



# FRN Line Item Page: Adding an Additional FRN Line Item

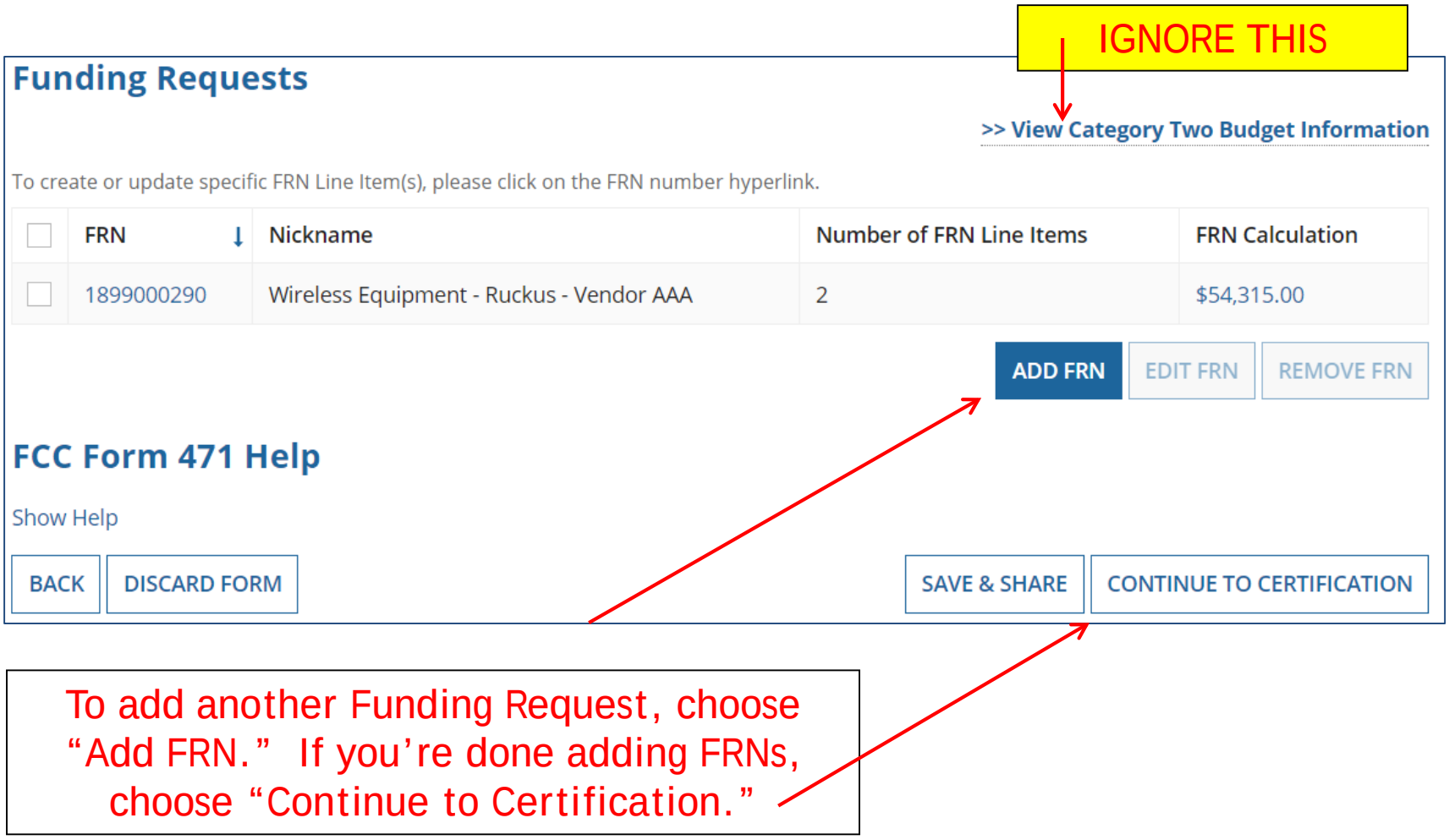



Notice, the system generated a new FRN line item number after the FRN number.

If you have more line items for this FRN, click here to add an additional FRN Line Item. We will add a new FRN Line Item in this example to add the Wireless Controller to the FRN.

If you have entered all of your FRN Line Items/Costs, click "**Continue**" to return to the main FRN page.

# Main FRN Page: Adding Another FRN




To add another Funding Request, choose "Add FRN." If you're done adding FRNs, choose "Continue to Certification."

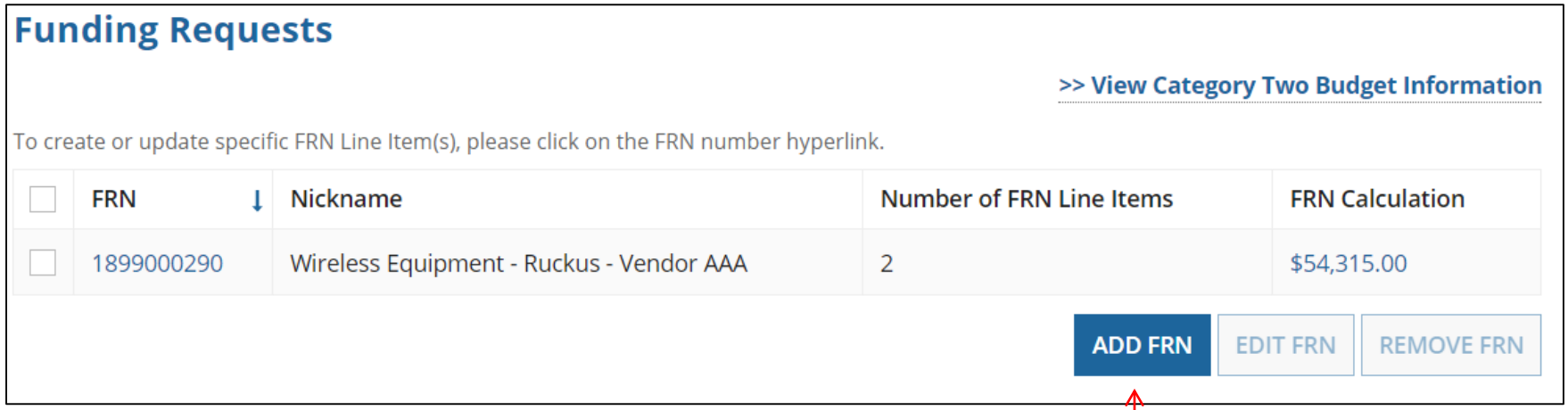
# Example 2:
# Network Switches FRN
## (Site specific equipment)

# FRN Example 2: Switching Equipment

- Assumptions:
  - Contracted service (all C2 must be contracted)
  - 1 FRN line item
  - 3 schools receiving equipment
  - No shared equipment
  - Equipment at each school
    - Jacksonville School – 5 @ $1350 = $6750
    - Plainfield School – 5 @ 1350 = $6750
    - Franklin School – 14 @ $1350 = $18,900
    - TOTAL: $32,400
    - Quantity Total: 24

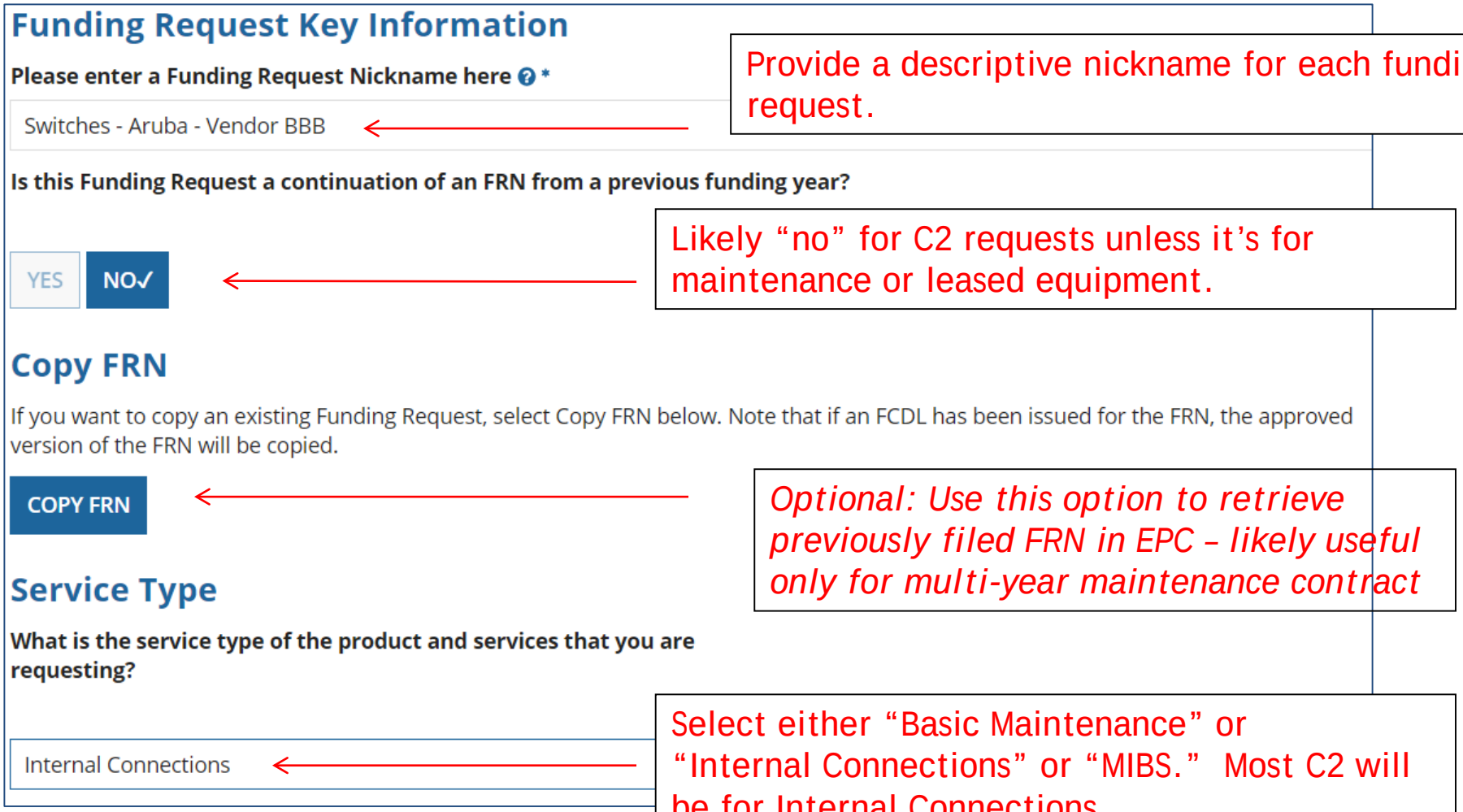
*Note: Many switches contain several modules that each requires its own line item. For the sake of brevity, we're just using one of those modules in this example.*

# Main FRN Page




Click “Add FRN” to add an additional Category 2 FRN.

# Funding Request Key Information



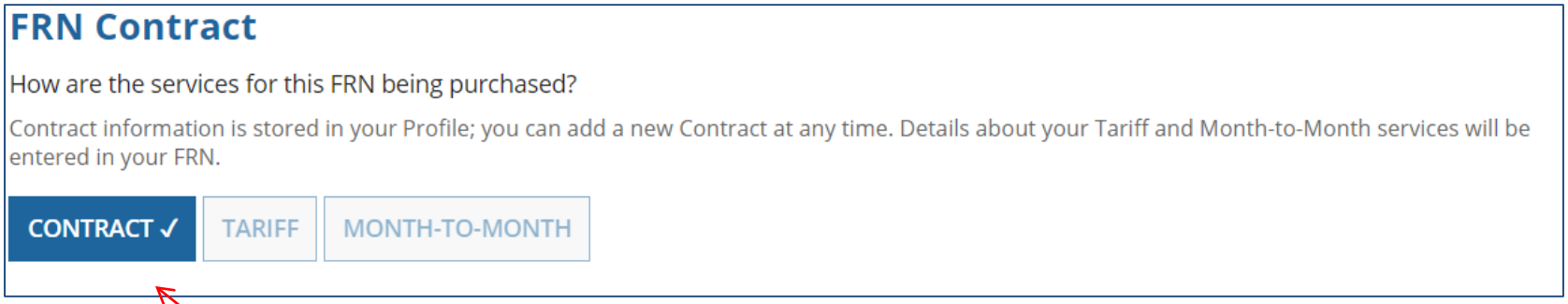

Provide a descriptive nickname for each funding request.

Likely "no" for C2 requests unless it's for maintenance or leased equipment.

*Optional: Use this option to retrieve previously filed FRN in EPC – likely useful only for multi-year maintenance contract*

Select either "Basic Maintenance" or "Internal Connections" or "MIBS." Most C2 will be for Internal Connections.

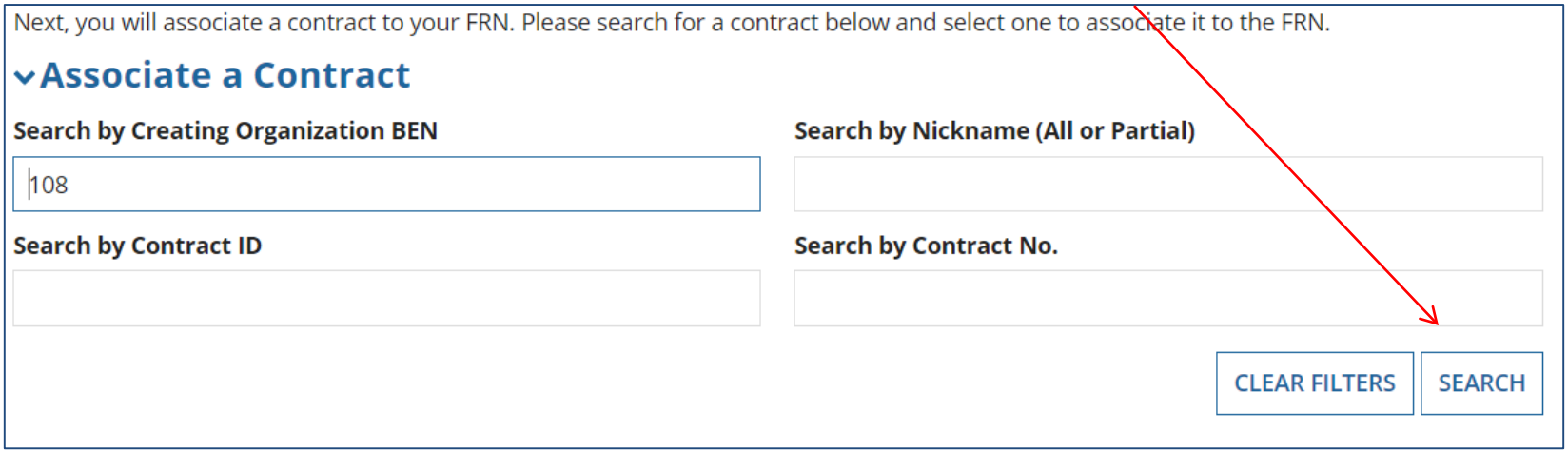
# Contract vs. MTM




Select "Contract" for all Category 2 funding requests.

# Linking to a Contract

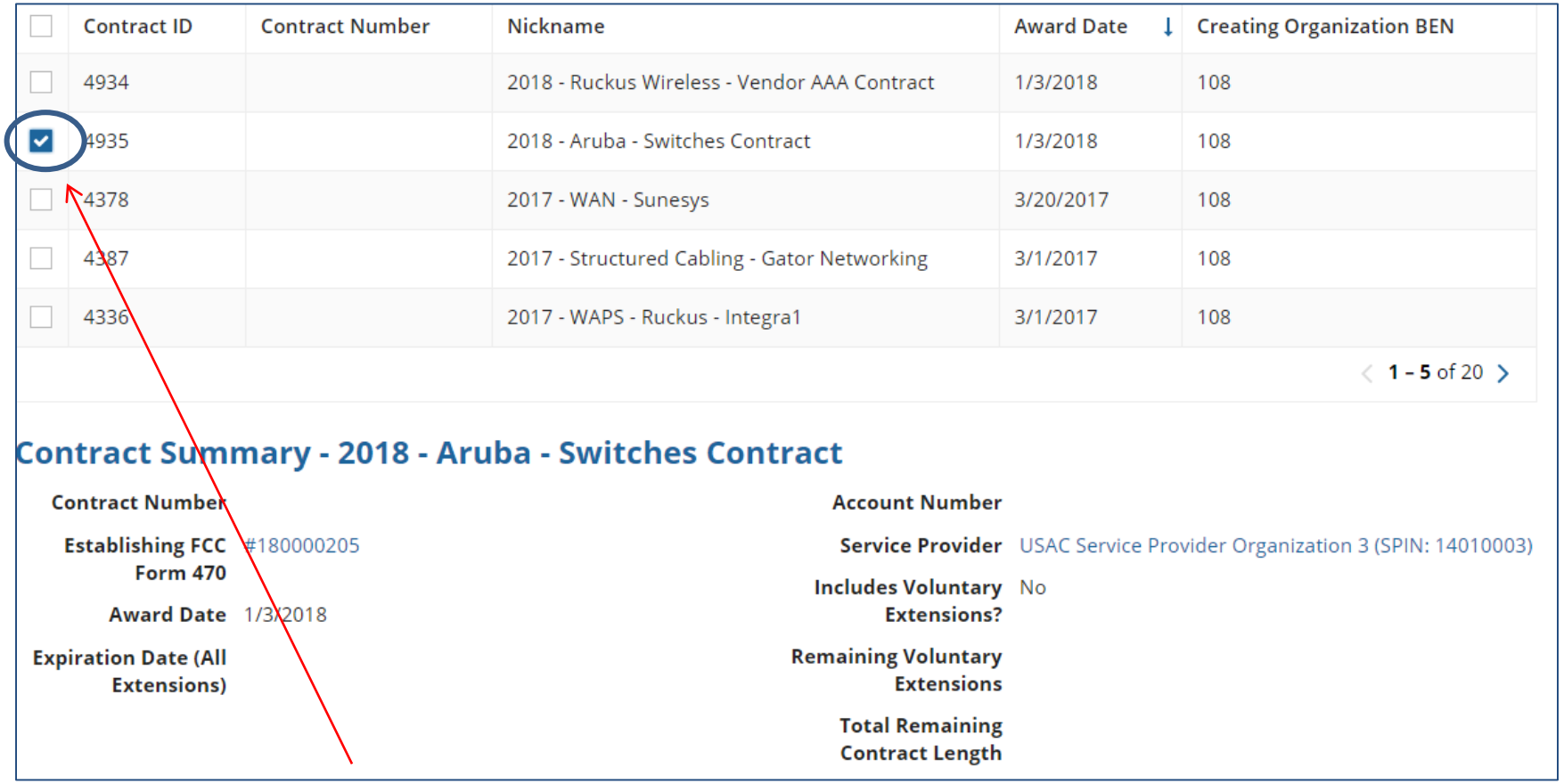
Click “Search” to see all your contracts listed.




Since “Contract” was selected on the previous screen, you will be prompted to search for all of the contracts you have entered in the EPC Contract Module.

You must have your Contract Records created in your EPC portal in order for this to work. If you have not yet created your CR’s, in a separate tab, go to > Landing Page > District Name > Contracts from top menu bar > Manage Contracts > Add New Contract.

# Choosing the Appropriate Contract



| | Contract ID | Contract Number | Nickname | Award Date | Creating Organization BEN |
|---|---|---|---|---|---|
| ☐ | 4934 | | 2018 - Ruckus Wireless - Vendor AAA Contract | 1/3/2018 | 108 |
| ☑ | 4935 | | 2018 - Aruba - Switches Contract | 1/3/2018 | 108 |
| ☐ | 4378 | | 2017 - WAN - Sunesys | 3/20/2017 | 108 |
| ☐ | 4387 | | 2017 - Structured Cabling - Gator Networking | 3/1/2017 | 108 |
| ☐ | 4336 | | 2017 - WAPS - Ruckus - Integra1 | 3/1/2017 | 108 |

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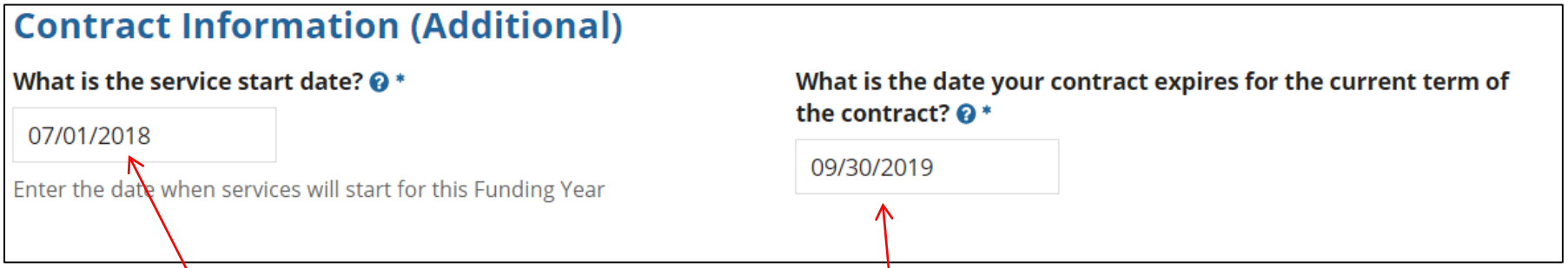
**Contract Summary - 2018 - Aruba - Switches Contract**

| | | | |
|---|---|---|---|
| **Contract Number** | | **Account Number** | |
| **Establishing FCC Form 470** | #180000205 | **Service Provider** | USAC Service Provider Organization 3 (SPIN: 14010003) |
| **Award Date** | 1/3/2018 | **Includes Voluntary Extensions?** | No |
| **Expiration Date (All Extensions)** | | **Remaining Voluntary Extensions** | |
| | | **Total Remaining Contract Length** | |

After clicking "Search," you will see all of the contracts you entered in EPC. Select the correct contract that should be linked to this funding request.

# Entering Service Start and Contract Expiration Dates

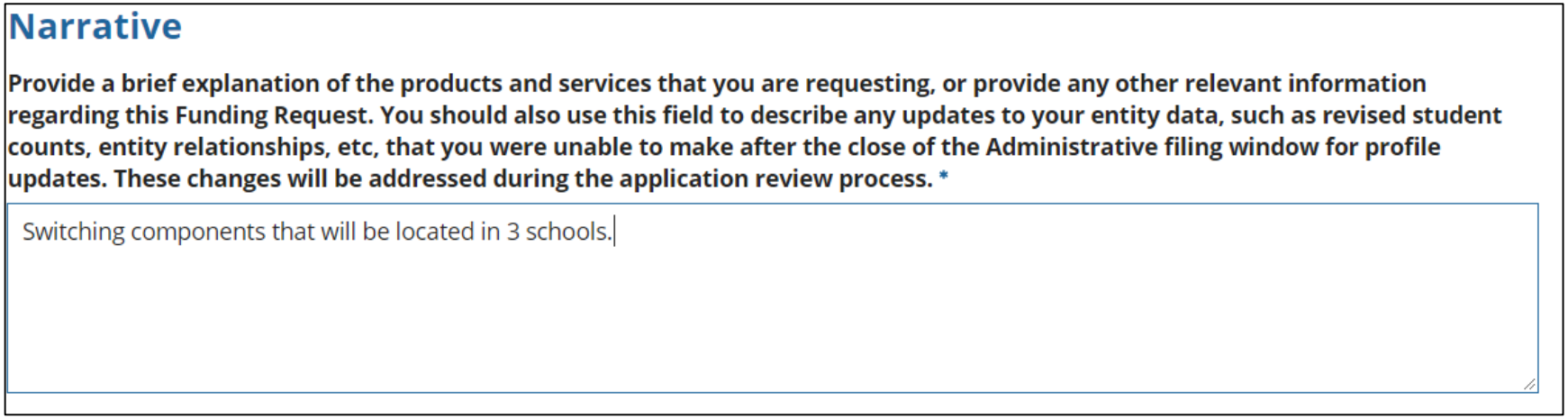



**Service Start Date:**
The system will automatically enter 7/1/2018 as SSD.

Note: In previous years, you listed this as 4/1/20xx – these should always be listed now as 7/1/20xx.

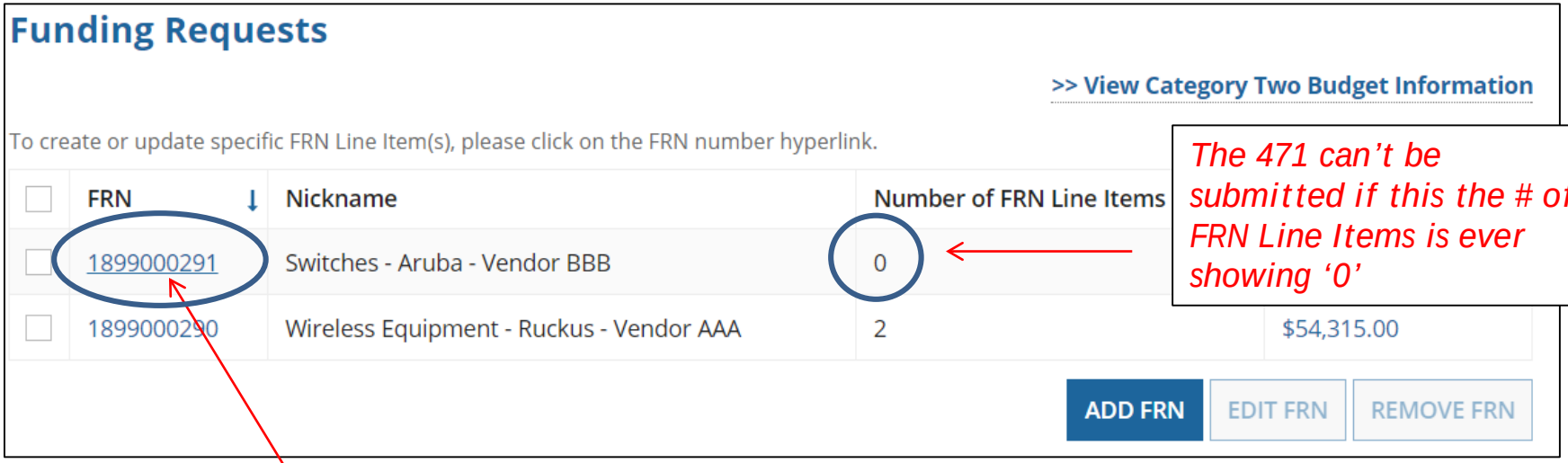
**Contract Expiration Date:**
You will need enter the CED for this contract, which is likely 9/30/2019 for Category 2 equipment contracts.

# FRN Narrative Box




Provide a brief narrative that will give enough details so your PIA reviewer understands the services you are requesting. Something like, "Switching components that will be located in 3 schools."

# Adding an FRN Line Item

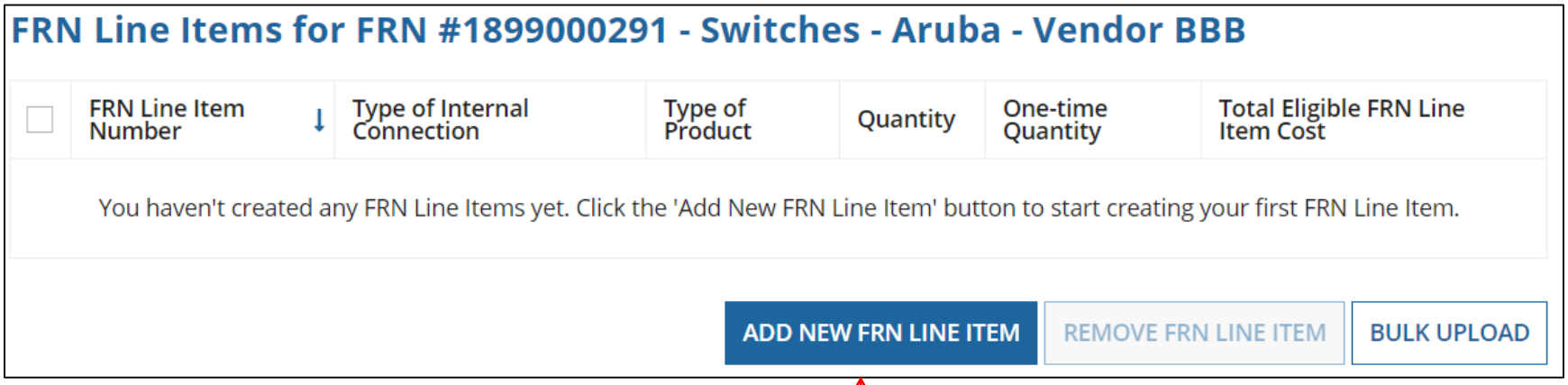



*The 471 can't be submitted if this the # of FRN Line Items is ever showing '0'*

This is the Main FRN Page. The next step is to add an FRN Line Item(s).

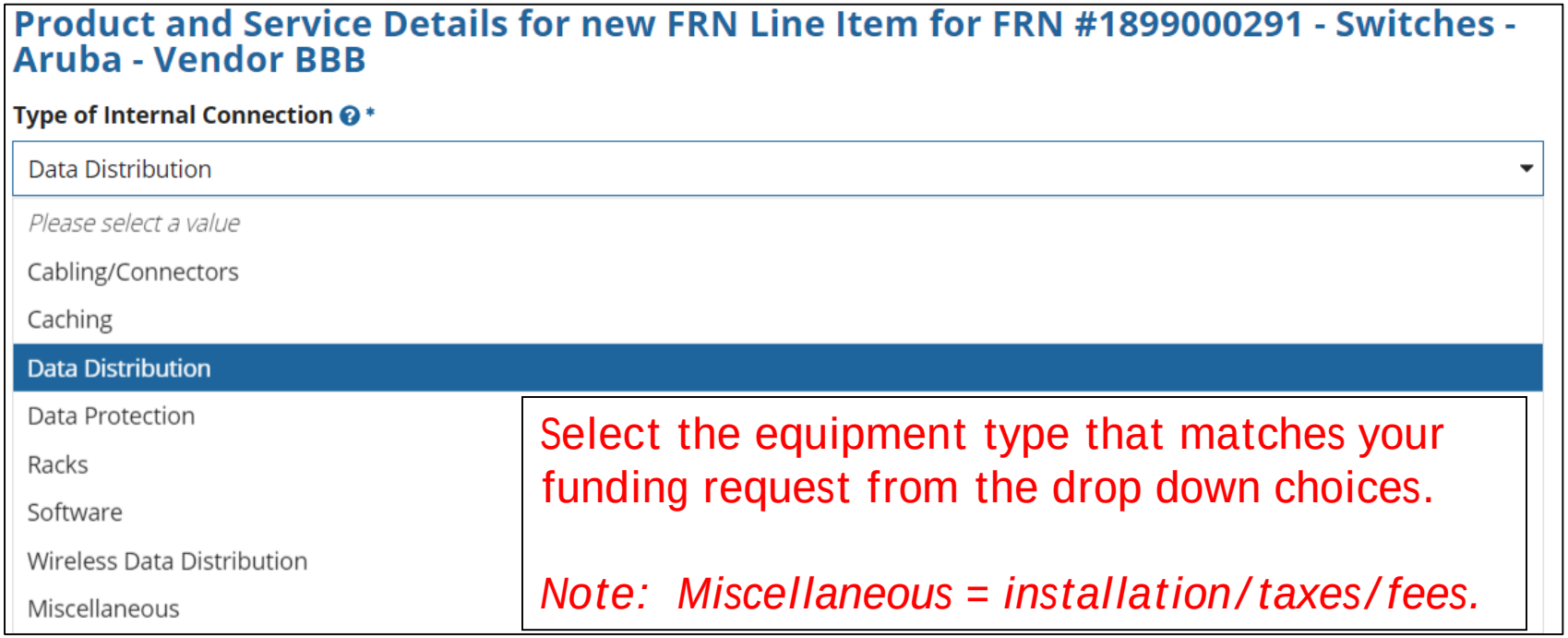
Click the blue FRN number to add an FRN Line Item which will provide additional details and costs for this funding request.

# Adding FRN Line Item




Select "Add New FRN Line Item."

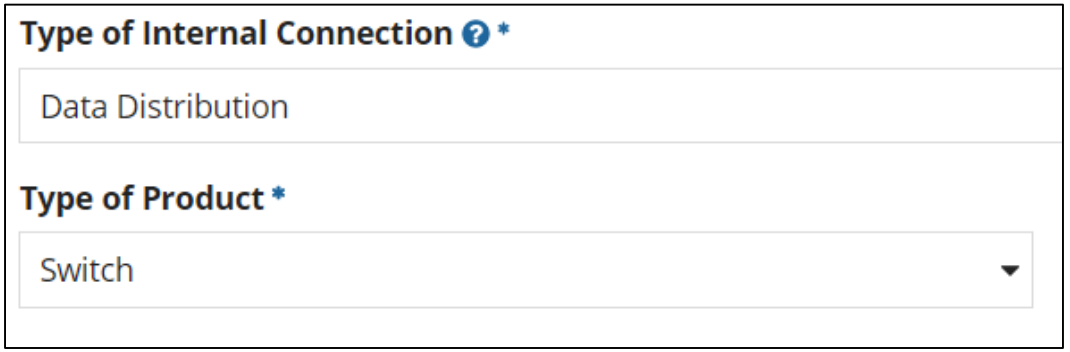
# Adding a Line Item – Type of IC



# Adding a Line Item – Type of Product

The "Type of Product" choices change depending on the Type of IC was selected.

Generally, here are the options:



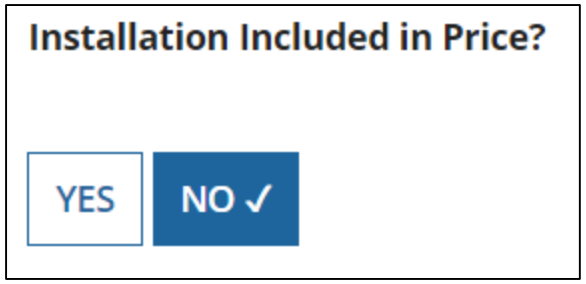

| If This Type of Internal Connection... | Then These Are the Options for Type of Product |
|---|---|
| Cabling/Connectors | Cabling/Connectors |
| Caching | Caching Service, Equipment |
| Data Distribution | Routers, Switches |
| Data Protection | Firewall, UPS |
| Racks | Racks/Cabinets |
| Software | Operating System Software |
| Wireless Data Distribution | WAPS, Antenna, Controllers |
| Miscellaneous | Installation, Training and Taxes |

# Listing Make/Model Number

The "Make" is the manufacturer's name and there is a long list to choose from. Use "Other" if your manufacturer isn't listed, and then type-in the name.

The "Model" should be the manufacturer's SKU or Model Number – not a description.

# Installation/Leasing Questions




Select "No" if installation is not bundled with this FRN line item, or if installation is listed on a separate FRN Line Item, or if installation is not included on your contract.

Select "Yes" if this is an FRN line item just for installation, or if installation is BUNDLED in with the price for this FRN line item.

If you are leasing the equipment (as opposed to purchasing it), select "Yes." The most common answer will be "No."

# Entering Unit Costs/Quantity

If this line item is for equipment purchases, enter $0's in the monthly recurring cost column.

For equipment purchases/installation, list the cost/unit for this FRN Line Item.

List the # of units.

**Cost Calculation for new FRN Line Item for FRN #1899000291 - Switches - Aruba - Vendor BBB**

| Monthly Cost | |
|---|---|
| Monthly Recurring Unit Cost | $0.00 |
| Monthly Recurring Unit Ineligible Costs | $0.00 |
| Monthly Recurring Unit Eligible Costs | = $0.00 |
| Monthly Quantity | 0 |
| Units | Each |
| Total Monthly Eligible Recurring Costs | = $0.00 |
| Months of Service | x 12 |
| Total Eligible Recurring Costs | = $0.00 |

| One-Time Cost | |
|---|---|
| One-time Unit Cost | $1,350.00 |
| One-time Ineligible Unit Cost | $0.00 |
| One-time Eligible Unit Cost | = $1,350.00 |
| One-time Quantity | 24 |
| Total Eligible One-time Costs | = $32,400.00 |

| Summary | |
|---|---|
| Total Eligible Recurring Costs | $0.00 |
| Total Eligible One-time Costs | + $32,400.00 |
| Pre-Discount Extended Eligible Line Item Cost | = $32,400.00 |

# Identifying Recipients of Equipment for this Line Item

**Is every entity for this organization receiving service?**

YES | NO ✓

Select "Yes" if all buildings are receiving equipment or sharing equipment. Select "No" if only one or some buildings are receiving/using the equipment.

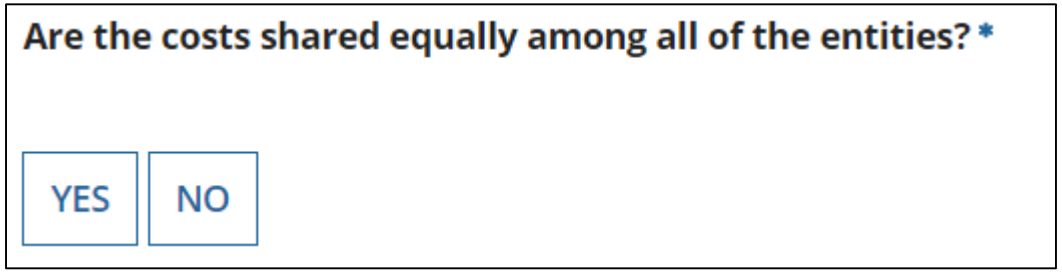
| | BEN | BEN Name |
|---|---|---|
| ☑ | 109 | Plainfield Elementary School |
| ☑ | 110 | Jacksonville Jr/Sr High School |
| ☐ | 10597 | Gallaudet Elementary School |
| ☑ | 10598 | Boone Middle School |
| ☐ | 10599 | Franklin High School |
| ☐ | 10600 | Bluford Middle School |
| ☐ | 10601 | Guggenheim Elementary School |
| ☐ | 10602 | Anderson Elementary School |
| ☐ | 10603 | Buchanan Elementary School |
| ☐ | 10604 | Ross Elementary School |

**1 – 10** of 11

If you selected "No," you are then prompted to select/check the buildings receiving the equipment/service. Then click "Add."

ADD

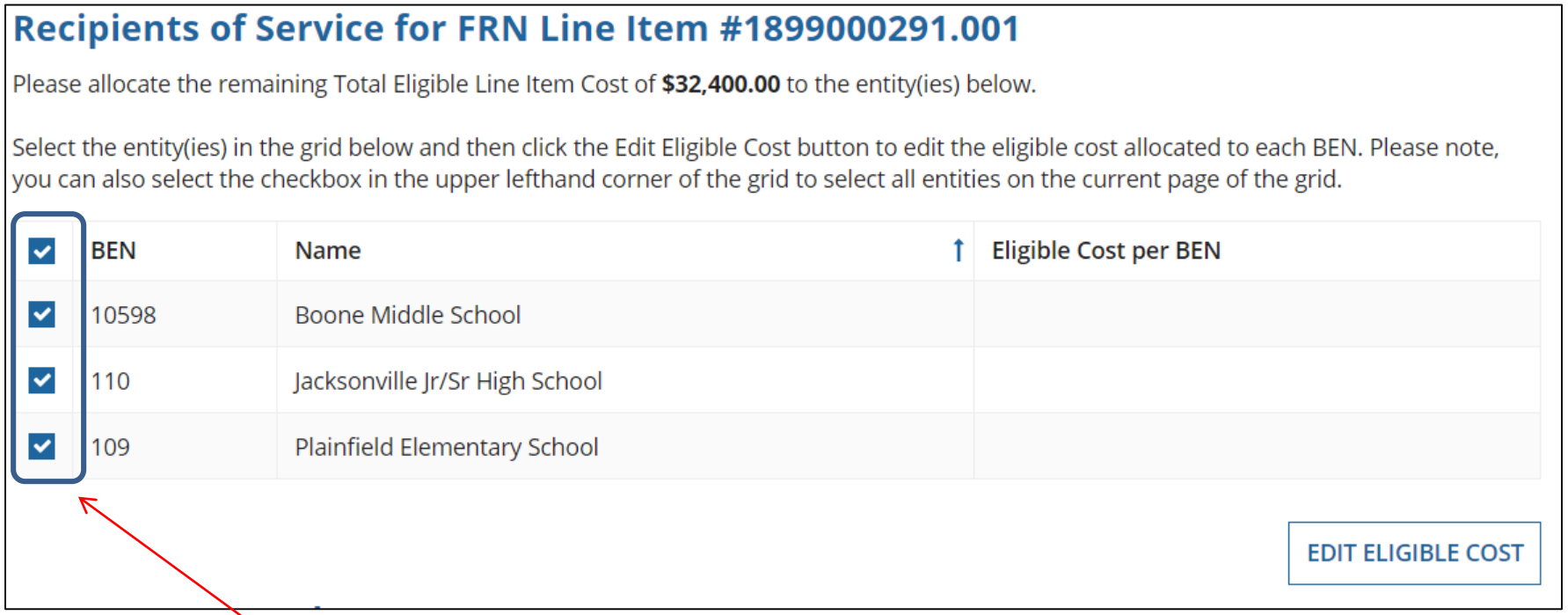
# Important Question!!!




If you answer "Yes" the system will split the costs of this line item equally among the schools you selected from the previous list.

Unless the quantities are identical per school, do **not** want to choose this option. Instead, select "No" and the system will allow you to enter the appropriate costs per school.

# Assigning Eligible Costs/Building



## Recipients of Service for FRN Line Item #1899000291.001

Please allocate the remaining Total Eligible Line Item Cost of **$32,400.00** to the entity(ies) below.

Select the entity(ies) in the grid below and then click the Edit Eligible Cost button to edit the eligible cost allocated to each BEN. Please note, you can also select the checkbox in the upper lefthand corner of the grid to select all entities on the current page of the grid.

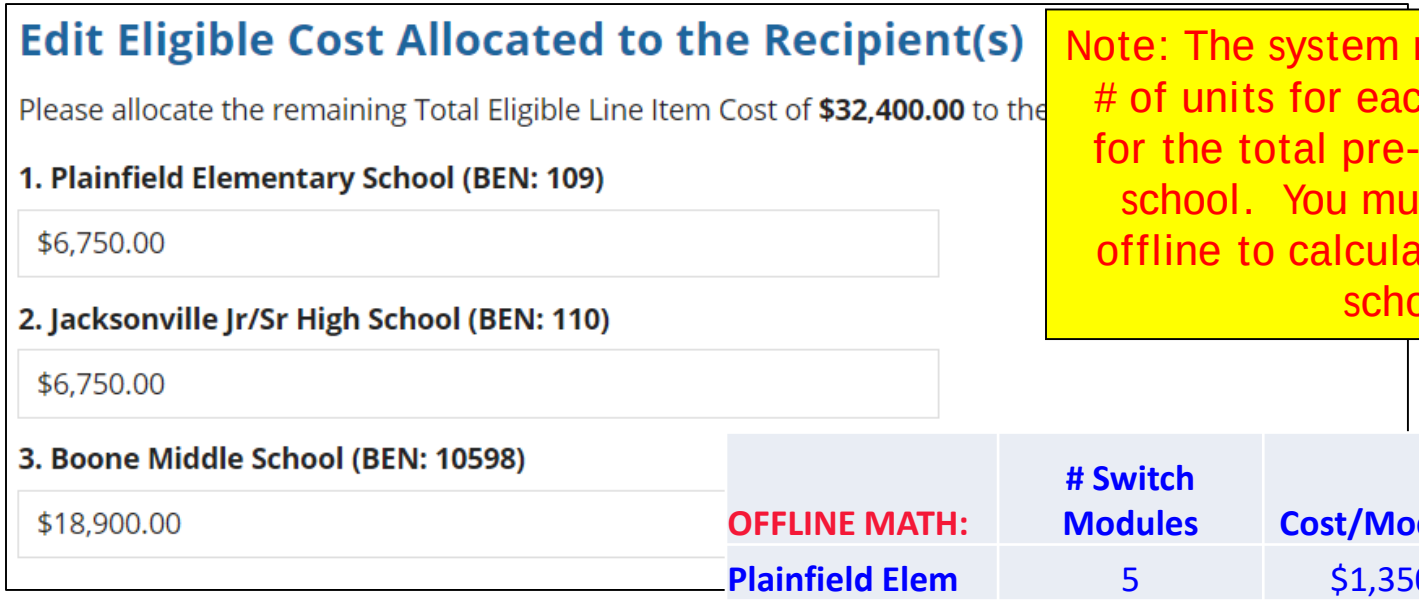
| | BEN | Name ↑ | Eligible Cost per BEN |
|---|---|---|---|
| ☑ | 10598 | Boone Middle School | |
| ☑ | 110 | Jacksonville Jr/Sr High School | |
| ☑ | 109 | Plainfield Elementary School | |

EDIT ELIGIBLE COST

Check each school, then "Edit Eligible Cost" to assign the pre-discount amount to each school.

# Allocating Costs/School

You can now allocate the costs for each school that was selected as a recipient of the equipment. The amounts allocated to the schools must add up to the total amount of the line item.




Note: The system never asks for the # of units for each school. It asks for the total pre-discount cost by school. You must do the math offline to calculate the costs per school.

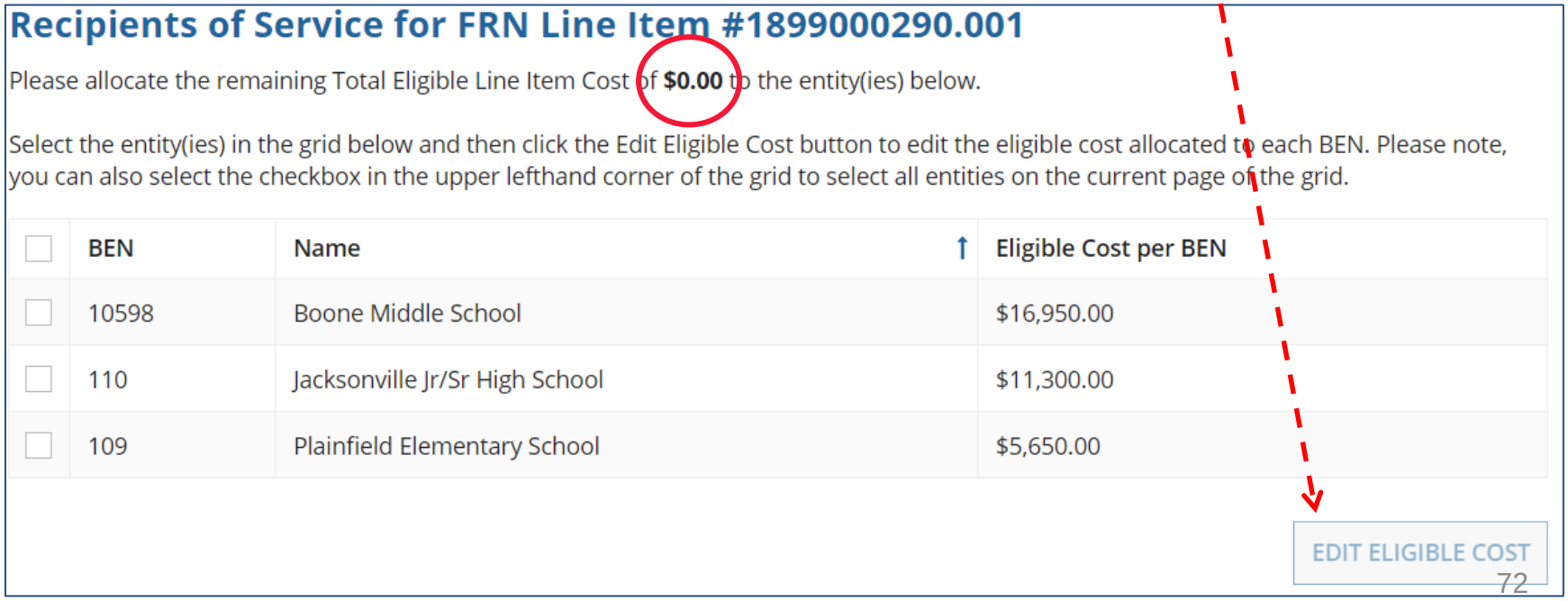
| OFFLINE MATH: | # Switch Modules | Cost/Module | Cost/School |
|---|---|---|---|
| Plainfield Elem | 5 | $1,350 | $ 6,750.00 |
| Jacksonville Jr HS | 5 | $1,350 | $ 6,750.00 |
| Boone MS | 14 | $1,350 | $ 18,900.00 |
| TOTAL | 24 | | $ 32,400.00 |

The total here should equal the total prediscount amount for the line item.

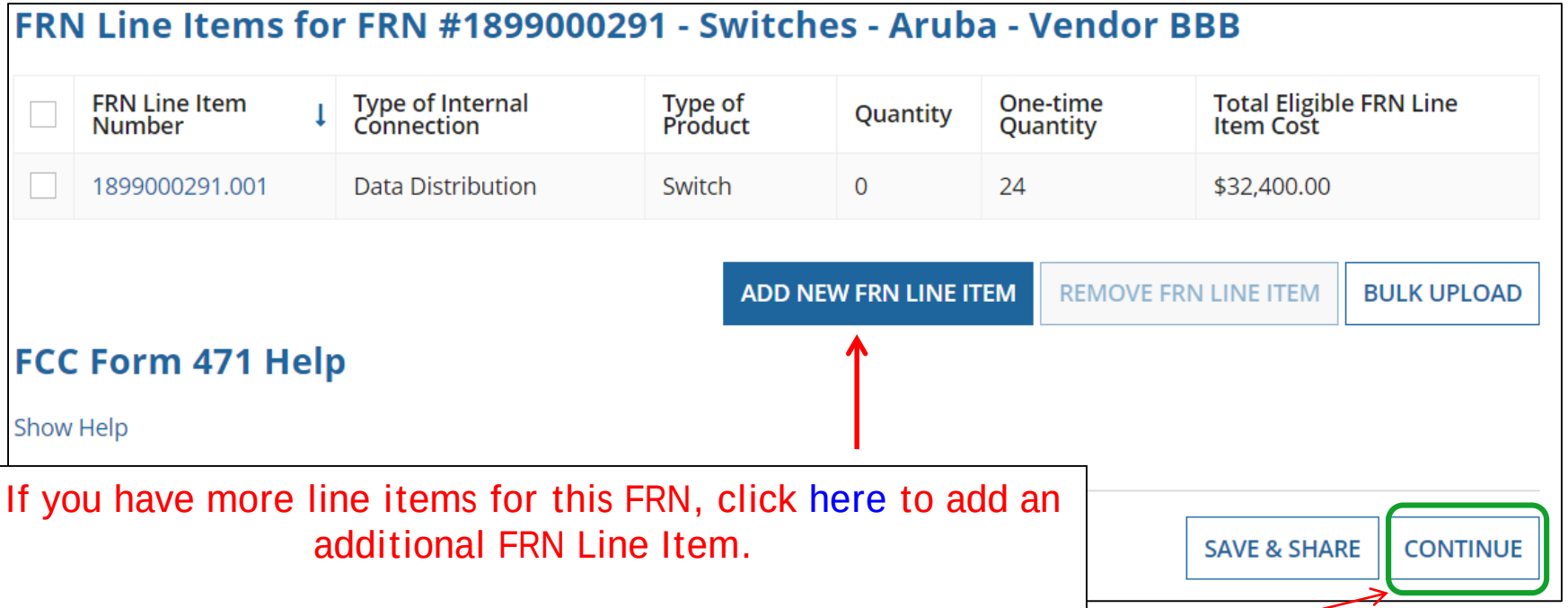
# Balancing to $0.00

After you have entered the amounts/building, the "amount remaining" should balance out to $0.00.

- If the remaining cost is just a few cents, it's likely due to a rounding issue, and you should return to the previous screen and add or subtract a few pennies from one of the allocations.
- If the remaining cost is more than a few cents, it's because there is an error in your offline math and you should double-check your figures and click on "Edit Eligible Cost" to make corrections.



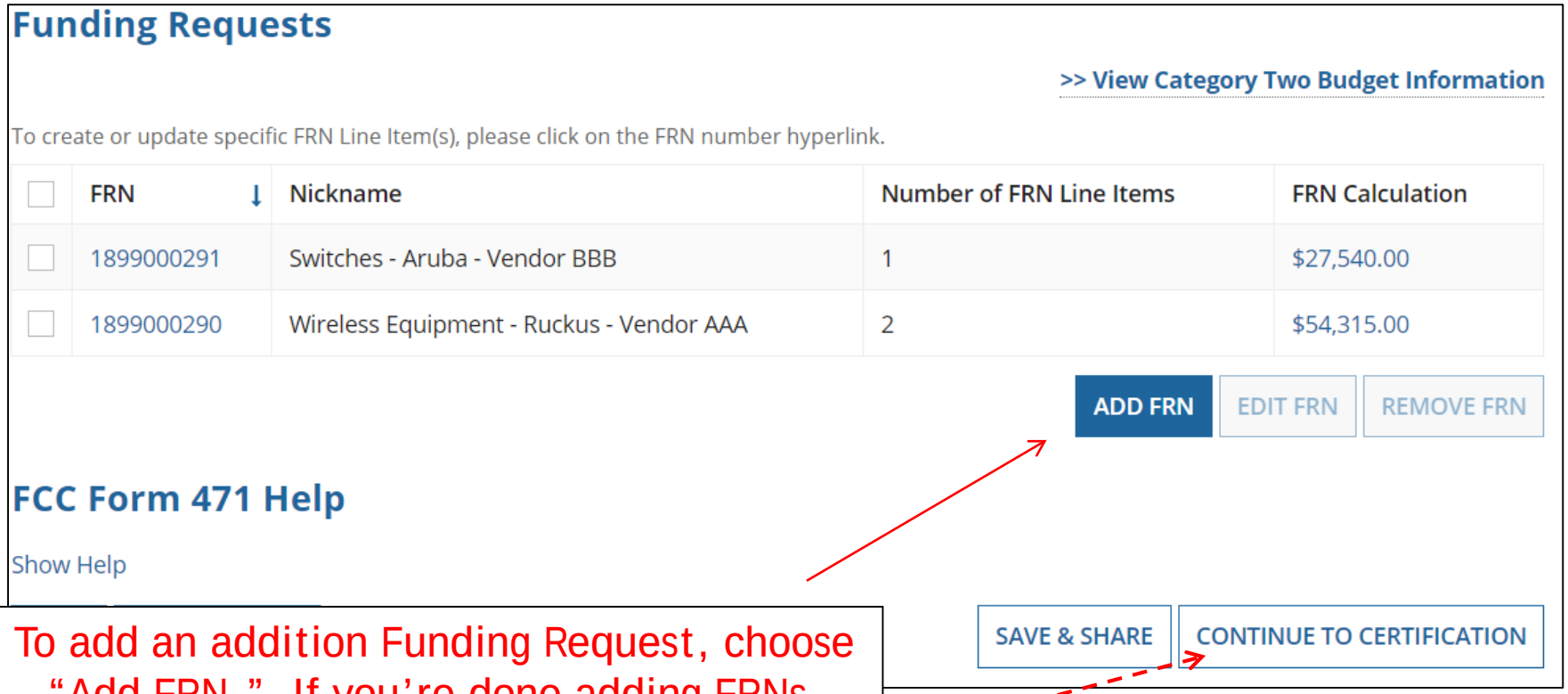
# FRN Line Item Page: Adding an Additional FRN Line Item




If you have more line items for this FRN, click here to add an additional FRN Line Item.

If you have entered all of your FRN Line Items/Costs, click "**Continue**" to return to the main FRN page.

# Main FRN Page: Adding Another FRN



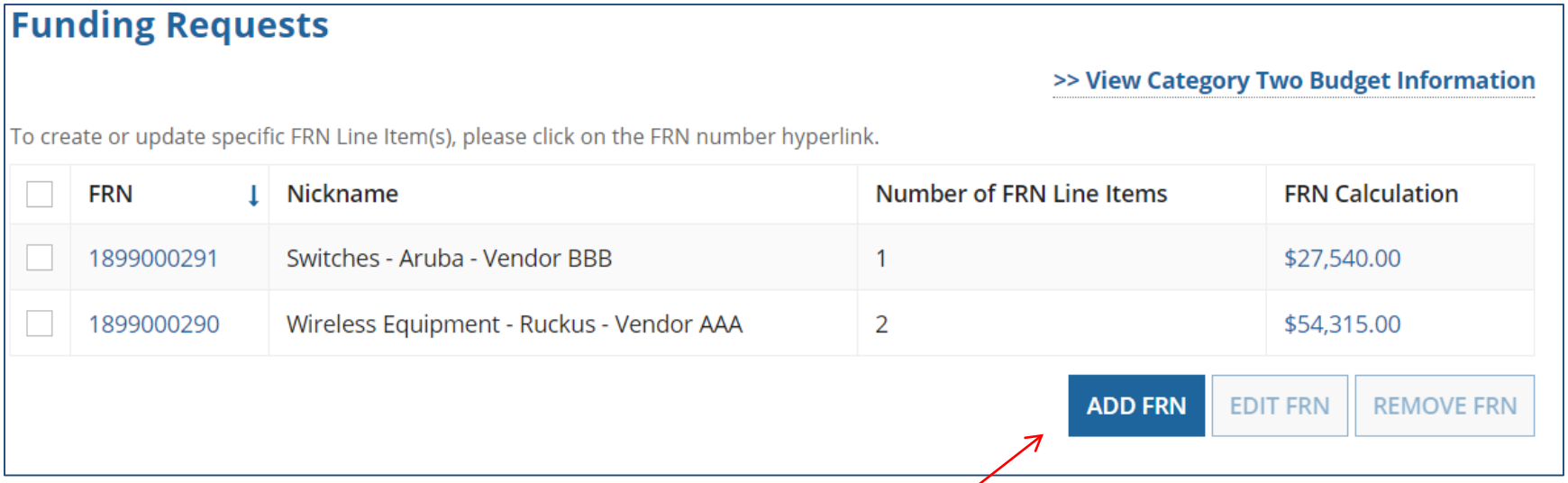

To add an addition Funding Request, choose "Add FRN." If you're done adding FRNs, choose "Continue to Certification."

# Example 3:
# Structured Cabling
## (Site specific service/equipment)

# FRN Example 3: Structured Cabling

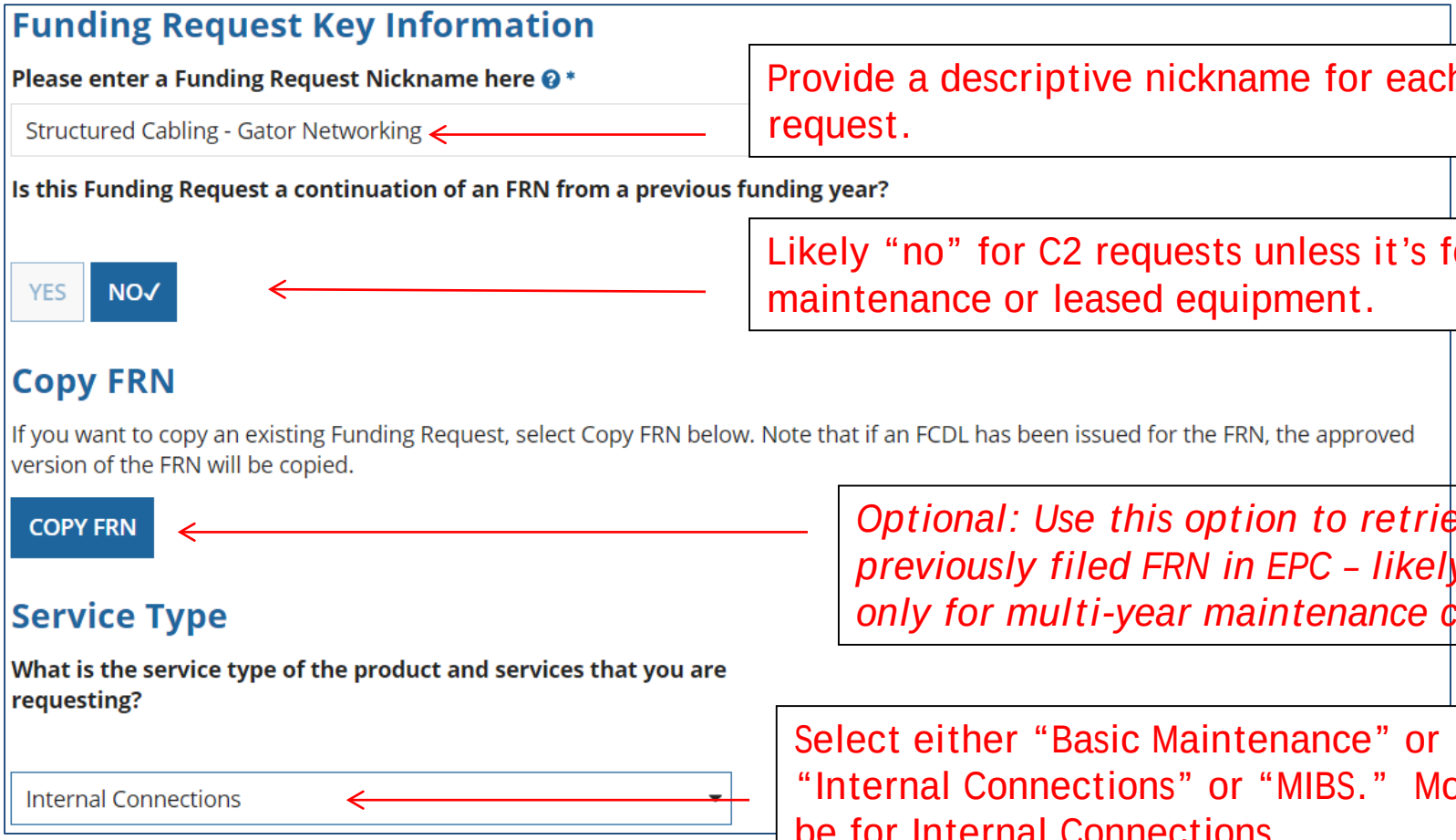
- Assumptions:
  - Contracted service (all C2 must be contracted)
  - 1 FRN line item
  - 1 school receiving structured cabling
    - Boone Middle School - $35,700
  - Do not list individual connectors, cables, widgets
    - Try to have your vendor contract be for a single cost per drop and not broken out by individual widget

# Main FRN Page: Adding Another FRN




To add an addition Funding Request, choose "Add FRN."

# Funding Request Key Information




Provide a descriptive nickname for each funding request.

Likely "no" for C2 requests unless it's for maintenance or leased equipment.

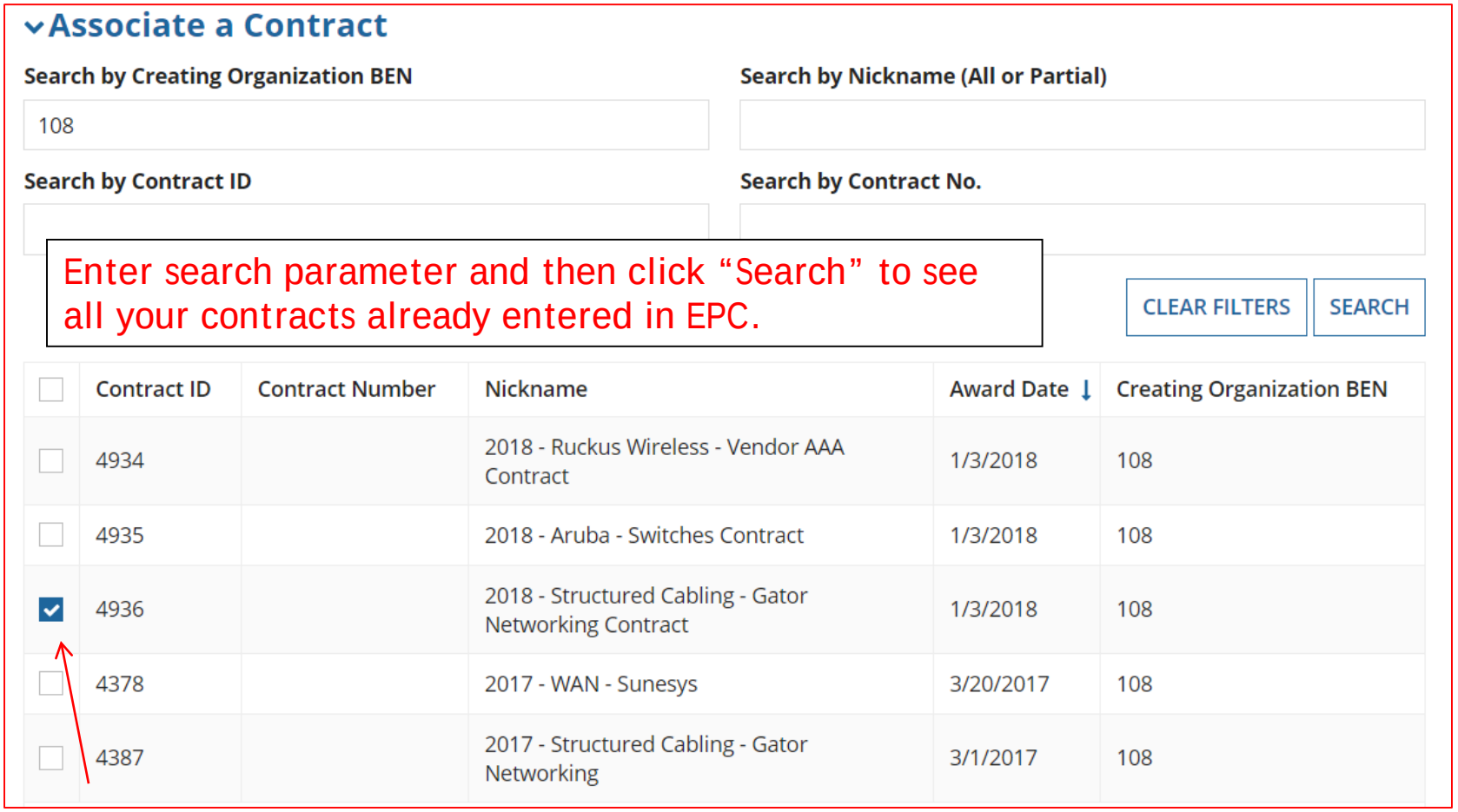
*Optional: Use this option to retrieve previously filed FRN in EPC – likely useful only for multi-year maintenance contract*

Select either "Basic Maintenance" or "Internal Connections" or "MIBS." Most C2 will be for Internal Connections.

# Contract vs. MTM

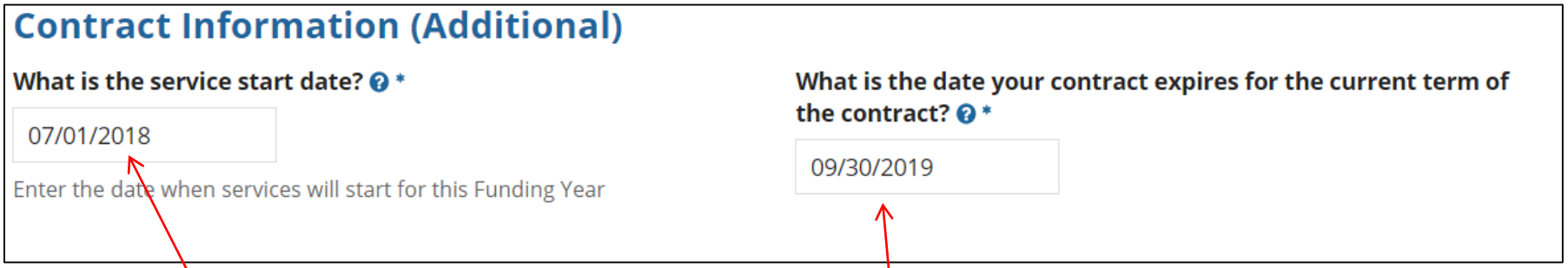
Select “Contract” for all Category 2 funding requests.

# Linking to a Contract




After clicking "Search," you will see all of the contracts you entered in EPC. Select the correct contract that should be linked to this funding request.

# Entering Service Start and Contract Expiration Dates

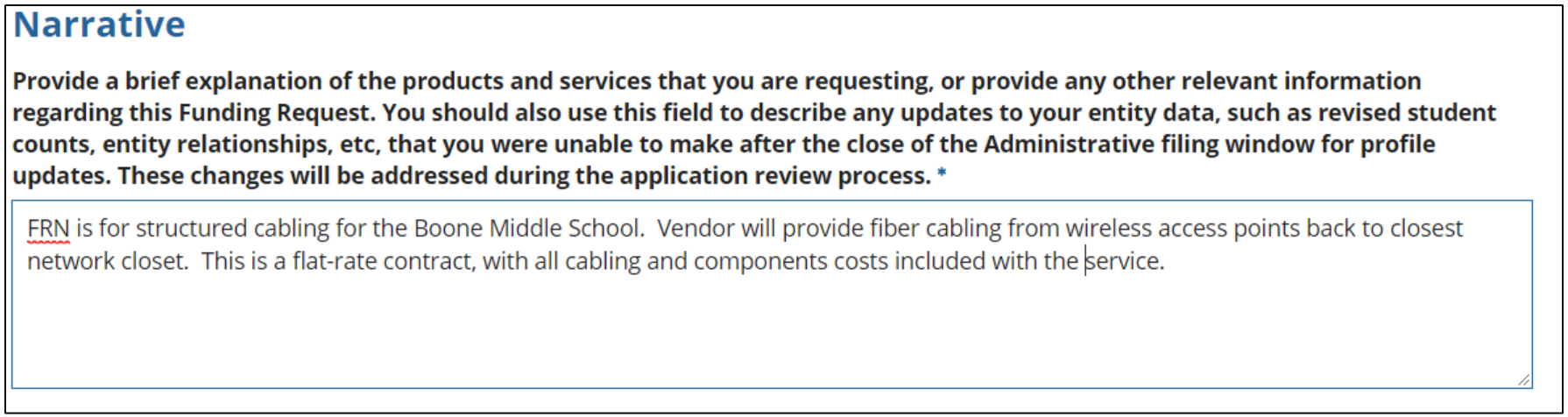



Service Start Date:
The system will automatically enter 7/1/2018 as SSD.

Note: In previous years, you listed this as 4/1/20xx – these should always be listed now as 7/1/20xx.

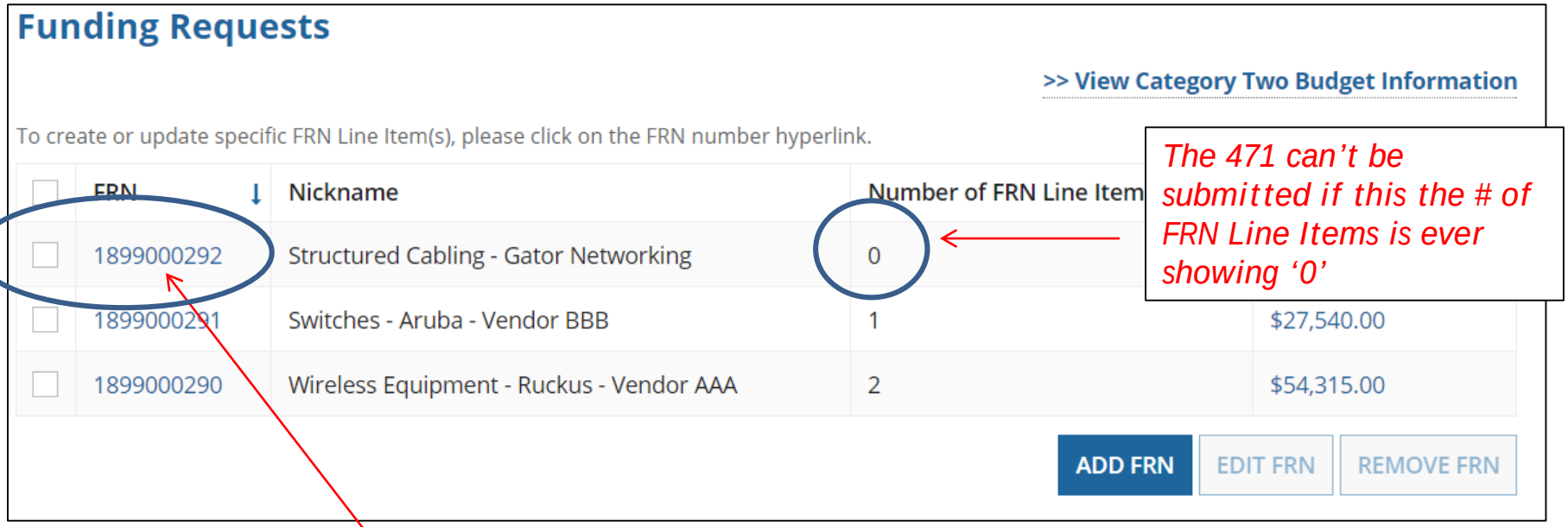
Contract Expiration Date:
You will need enter the CED for this contract, which is likely 9/30/2019 for Category 2 equipment contracts.

# FRN Narrative Box




Provide a brief narrative that will give enough details so your PIA reviewer understands the services you are requesting. Something like, "FRN is for structured cabling for the Franklin High School. Vendor will provide fiber cabling from wireless access points back to closest network closet. This is a flat-rate contract, with all cabling and components costs included with the above service."

# Adding an FRN Line Item




*The 471 can't be submitted if this the # of FRN Line Items is ever showing '0'*

This is the Main FRN Page. The next step is to add an FRN Line Item(s).

Click the blue FRN number to add an FRN Line Item which will provide additional details and costs for this funding request.

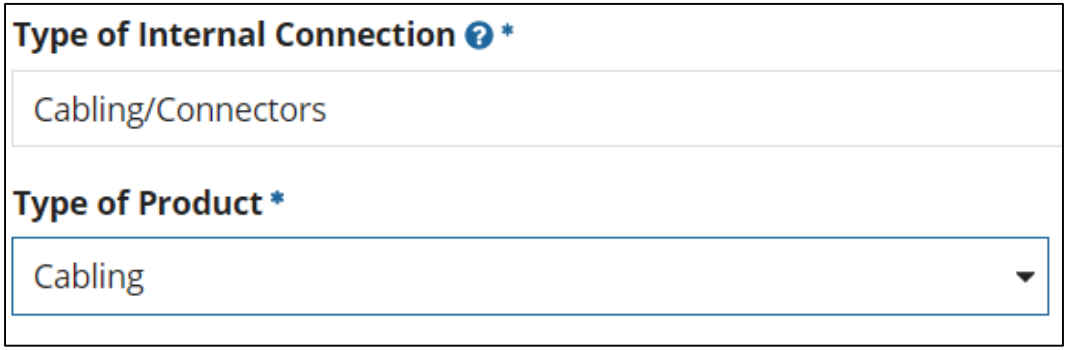
# Adding FRN Line Item

Select "Add New FRN Line Item."

# Adding a Line Item – Type of Product

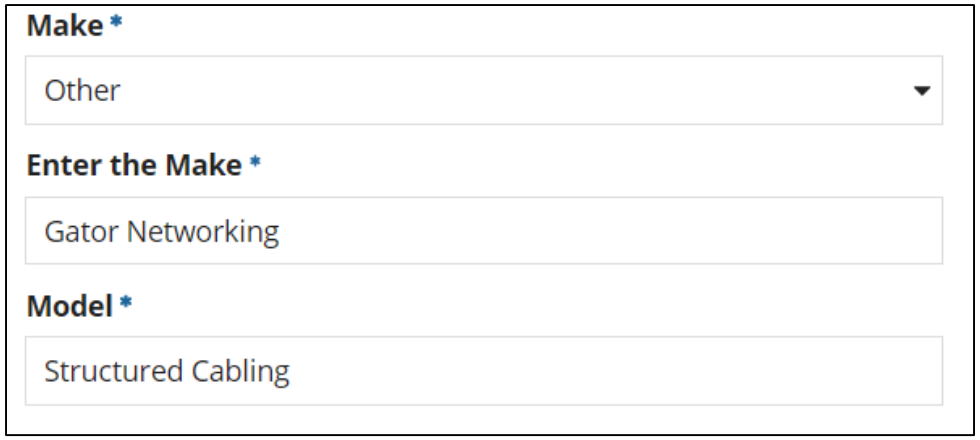
The "Type of Product" choices change depending on the Type of IC was selected.

Generally, here are the options:



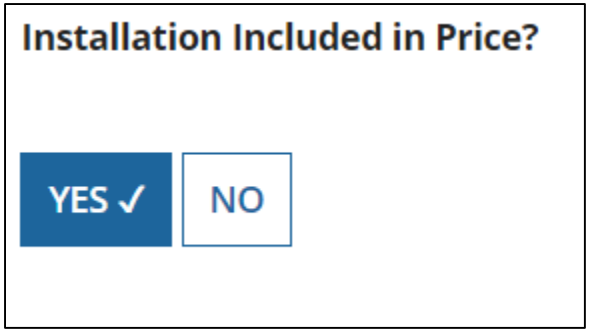

| If This Type of Internal Connection... | Then These Are the Options for Type of Product |
|---|---|
| Cabling/Connectors | Cabling/Connectors |
| Caching | Caching Service, Equipment |
| Data Distribution | Routers, Switches |
| Data Protection | Firewall, UPS |
| Racks | Racks/Cabinets |
| Software | Operating System Software |
| Wireless Data Distribution | WAPS, Antenna, Controllers |
| Miscellaneous | Installation, Training and Taxes |

# Listing Make/Model Number




The easiest way to apply for structured cabling is to have a vendor contract with a fixed price that is inclusive of all components. Then select "Other" and enter the vendor's name as the Make. List "Structured Cabling" as the Model.

# Installation/Leasing Questions




If the FRN is for a fixed price for structured cabling, then select "Yes."
However, if installation is listed on a separate line item, select "No."

If you are leasing the equipment, as opposed to purchasing it, select "Yes."
The most common answer will be "No."

# Entering Unit Costs/Quantity

If this line item is for equipment purchases, enter $0's in the monthly recurring cost column.

Enter Unit Cost and Quantity

| Monthly Cost | |
|---|---|
| Monthly Recurring Unit Cost | $0.00 |
| Monthly Recurring Unit Ineligible Costs | $0.00 |
| Monthly Recurring Unit Eligible Costs | = $0.00 |
| Monthly Quantity | 0 |
| Units | Each |
| Total Monthly Eligible Recurring Costs | = $0.00 |
| Months of Service | x 12 |
| Total Eligible Recurring Costs | = $0.00 |

| One-Time Cost | |
|---|---|
| One-time Unit Cost | $35,700.00 |
| One-time Ineligible Unit Cost | $0.00 |
| One-time Eligible Unit Cost | = $35,700.00 |
| One-time Quantity | 1 |
| Total Eligible One-time Costs | = $35,700.00 |

| Summary | |
|---|---|
| Total Eligible Recurring Costs | $0.00 |
| Total Eligible One-time Costs | + $35,700.00 |
| Pre-Discount Extended Eligible Line Item Cost | = $35,700.00 |

# Identifying Recipients of Equipment for this Line Item

**Is every entity for this organization receiving service?**

YES | NO ✓

Select "Yes" if all buildings are receiving equipment or sharing equipment. Select "No" if only one or some buildings are receiving/using the equipment.

| | BEN | BEN Name |
|---|---|---|
| ☐ | 109 | Plainfield Elementary School |
| ☐ | 110 | Jacksonville Jr/Sr High School |
| ☐ | 10597 | Gallaudet Elementary School |
| ☑ | 10598 | Boone Middle School |
| ☐ | 10599 | Franklin High School |
| ☐ | 10600 | Bluford Middle School |
| ☐ | 10601 | Guggenheim Elementary School |
| ☐ | 10602 | Anderson Elementary School |
| ☐ | 10603 | Buchanan Elementary School |
| ☐ | 10604 | Ross Elementary School |

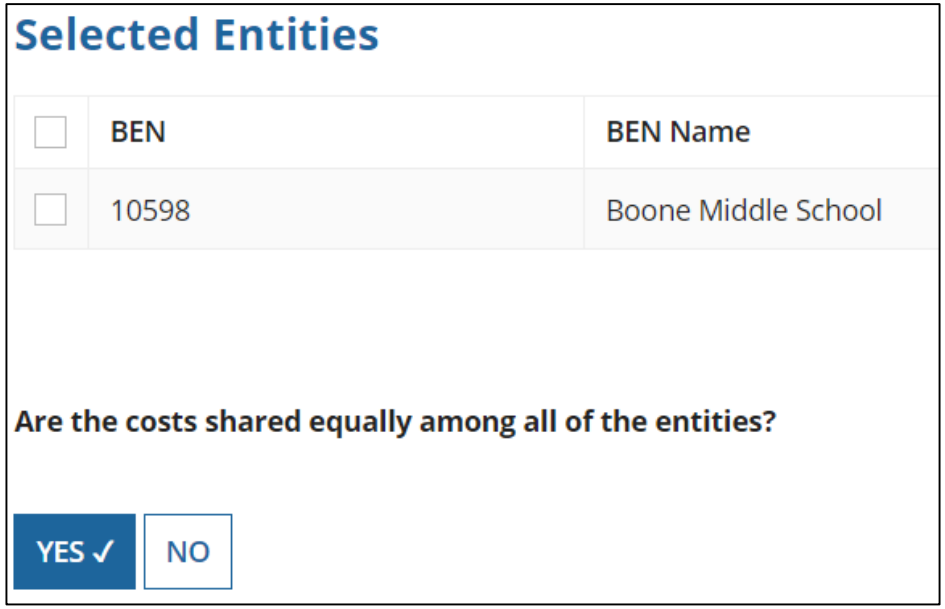
1 – 10 of 11

ADD

If you selected "No," you are then prompted to select/check the buildings receiving the equipment/service. Then click "Add."

In this example, only Boone Middle School is being wired.

# Are Costs Shared?




Generally, the answer to this question will be "No."

If you answer "Yes" the system will split the costs of this line item equally among the schools you selected from the previous list. If you answer "No" the system will allow you to enter the appropriate costs per school.

Because this is a single-site project, you can answer "Yes" and then no cost allocation must be done.

# Assigning Eligible Costs/Building

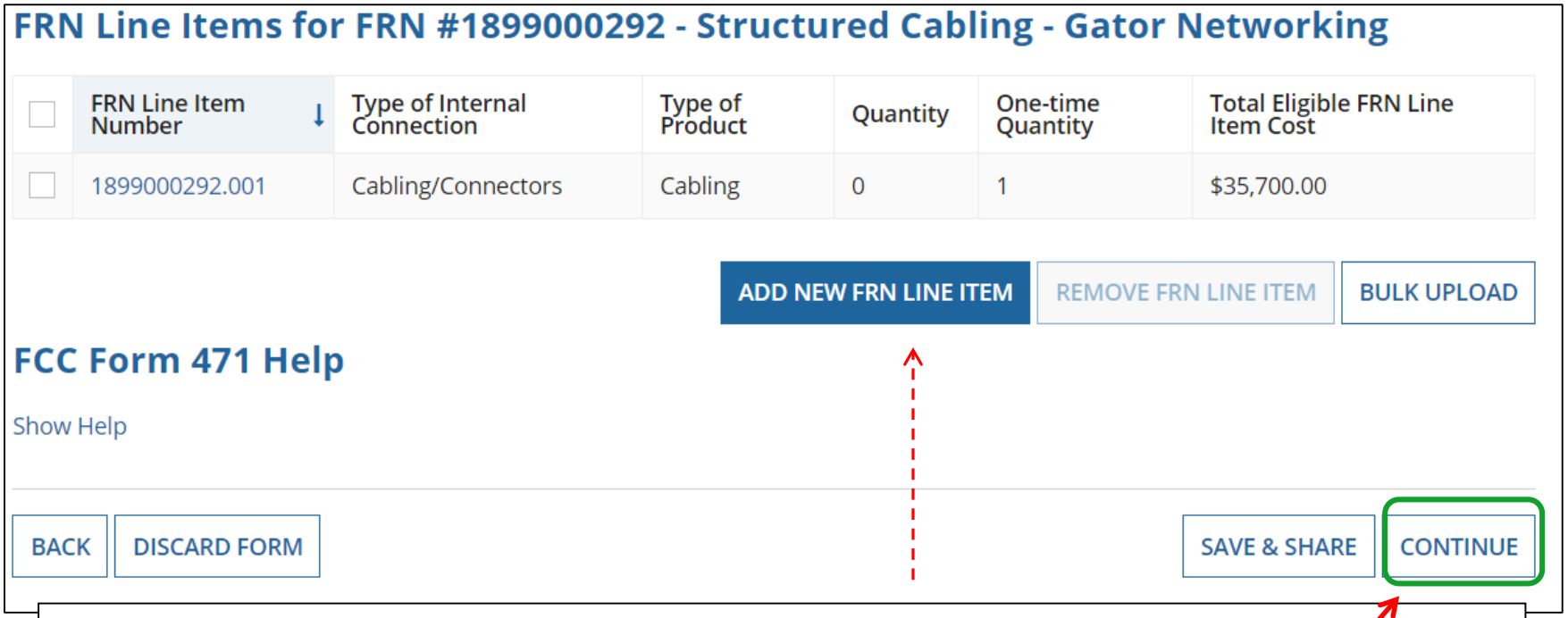
## Recipients of Service for FRN Line Item #1899000292.001

The Total Eligible Line Item Cost of $35,700.00 has been allocated equally to the entity(ies) below.

| BEN | Name ↑ | Eligible Cost per BEN |
|---|---|---|
| 10598 | Boone Middle School | $35,700.00 |

The system automatically allocated the full cost to the single site identified as the Recipient of Service.

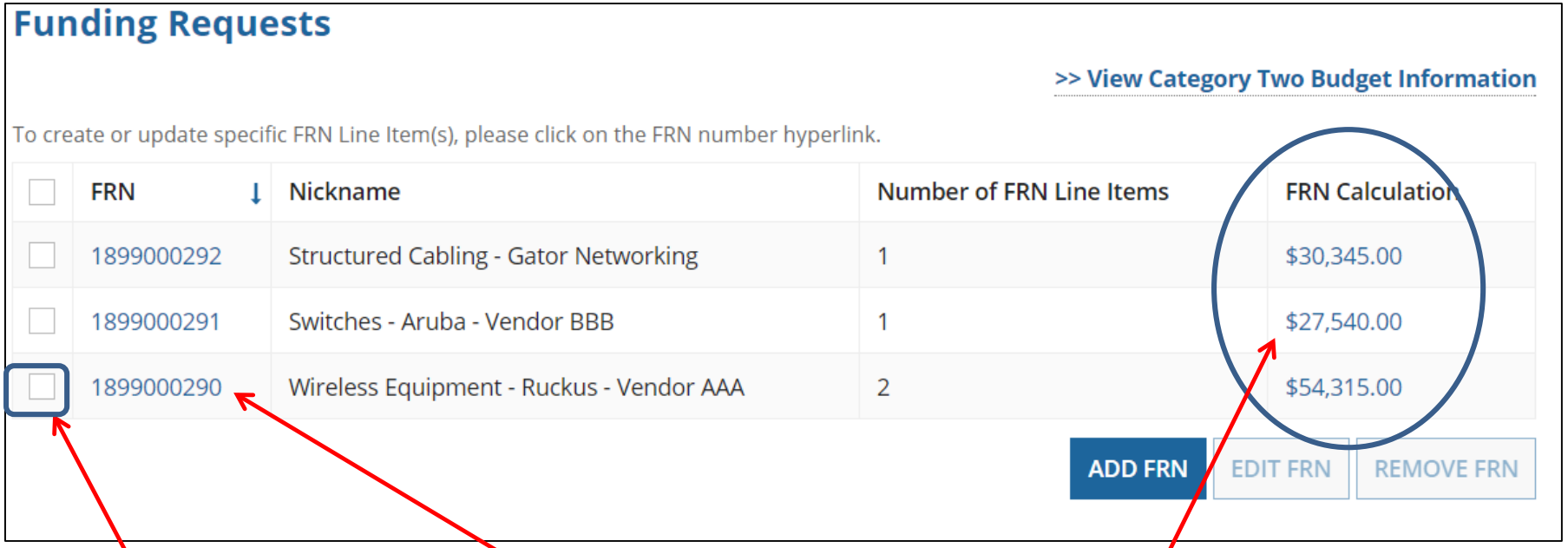
# FRN Line Item Page: Adding an Additional FRN Line Item




If you have more line items for this FRN, click here to add an additional FRN Line Item.

If you have entered all of your FRN Line Items/Costs, click "**Continue**" to return to the main FRN page.

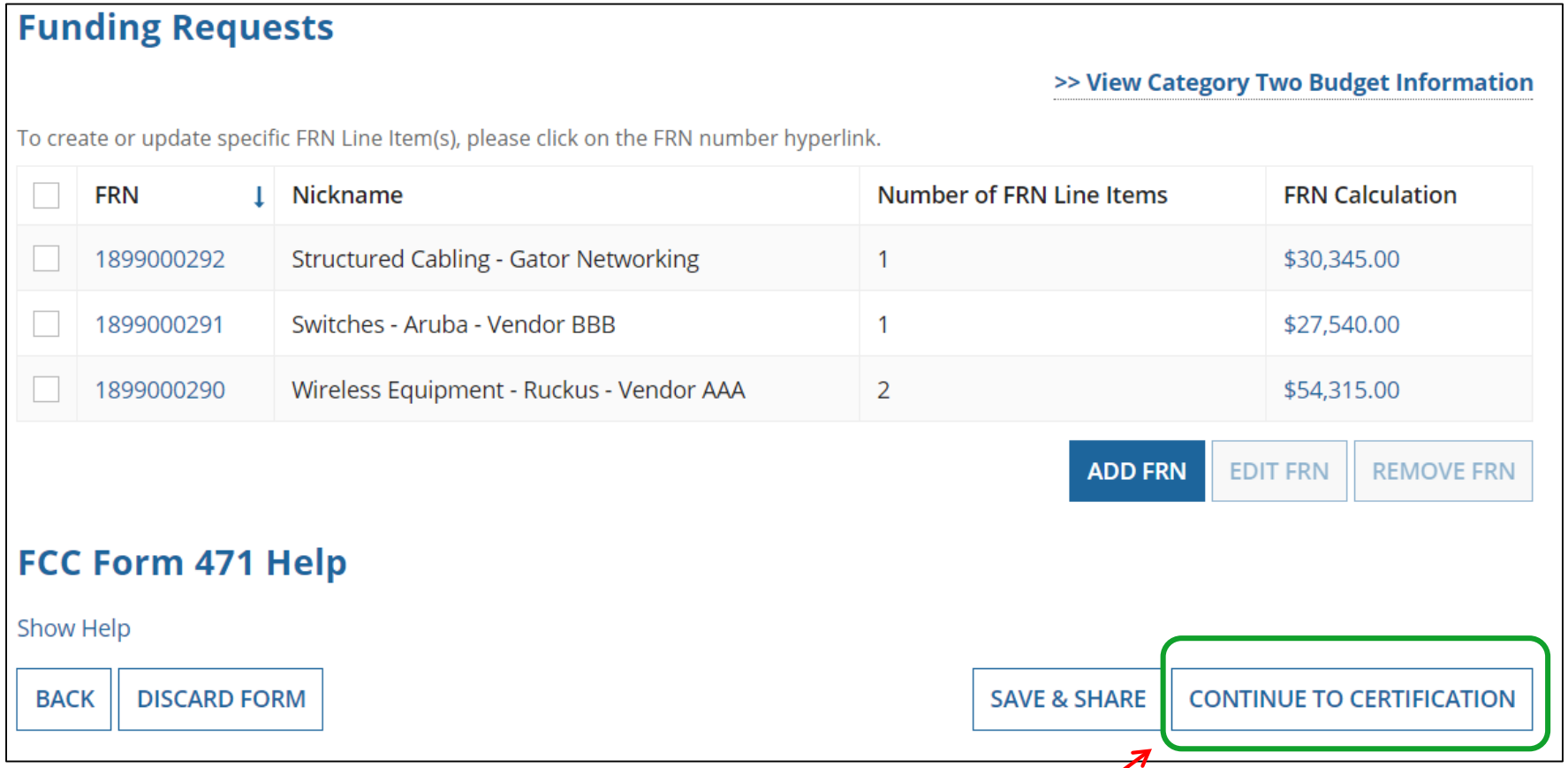
# Main FRN Page – Review FRN Calculations




Before finishing your application, be sure to click on each "FRN Calculation" to be sure it contains accurate information and requests enough funding.

To edit any FRN Line Items, click on the blue FRN number to see the list of line items.
To edit the FRN Key Information, click on the box next to the FRN, and then select "Edit FRN."

# Finished Adding FRNs?




If you're finished adding FRNs and have checked your calculations, click "**Continue to Certification**."

# Connectivity Questions Responses

### District/System-wide Internet Access Questions

**Does your school district currently aggregate Internet access for the entire district (as opposed to buying Internet access on a building-by-building basis)?**
Yes

**Download Speed**
500

**Download Speed Units**
Mbps

**Upload Speed**
500

**Upload Speed Units**
Mbps

### Per-Entity Basis Questions

**Entity Name**
BLUE RIBBON SCHOOL DISTRICT - PARENT ENTITY

**Entity Number**
108

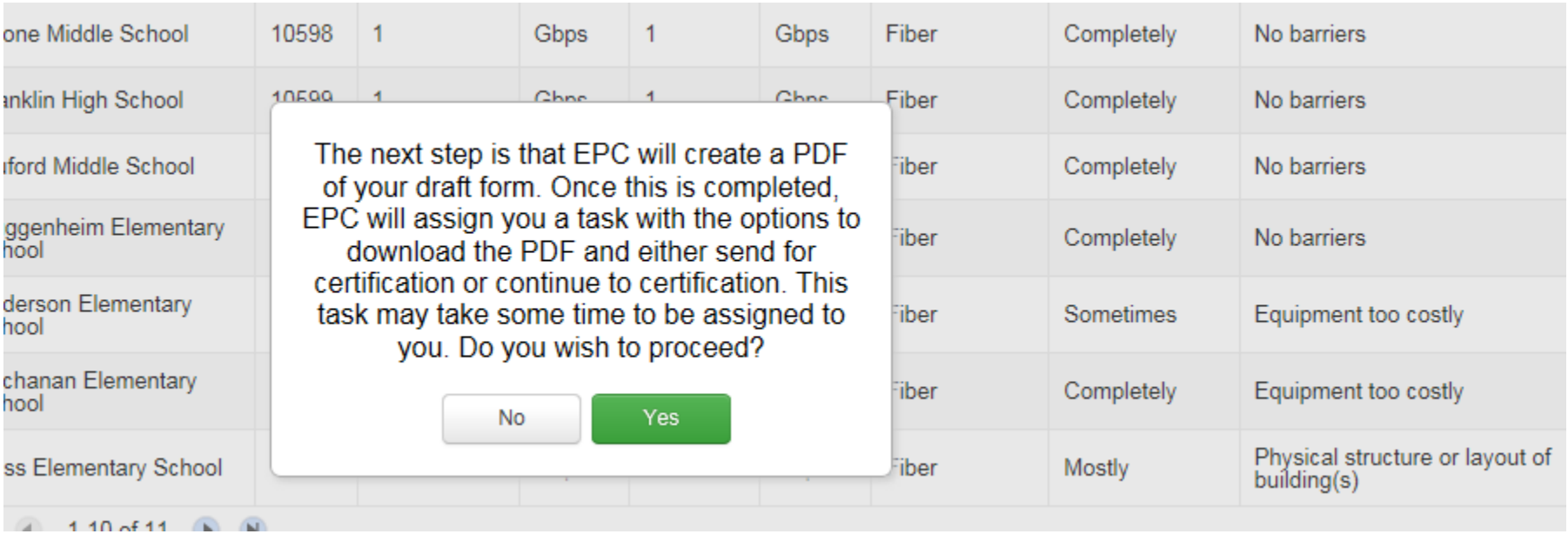
| Entity Name | BEN | Download | Units | Upload | Units | Connection | Wifi Sufficient | Barriers to Robust Network |
|---|---|---|---|---|---|---|---|---|
| Plainfield Elementary School | 109 | 100 | Mbps | 100 | Mbps | Fiber | Mostly | Physical structure or layout of building(s) |
| Jacksonville Jr/Sr High School | 110 | 1 | Gbps | 1 | Gbps | Fiber | Sometimes | Installation too costly |
| Gallaudet Elementary School | 10597 | 1 | Gbps | 1 | Gbps | Fiber | Completely | No barriers |
| Boone Middle School | 10598 | 1 | Gbps | 1 | Gbps | Fiber | Completely | No barriers |
| Franklin High School | 10599 | 1 | Gbps | 1 | Gbps | Fiber | Completely | No barriers |
| Bluford Middle School | 10600 | 1 | Gbps | 1 | Gbps | Fiber | Completely | No barriers |
| Guggenheim Elementary School | 10601 | 1 | Gbps | 1 | Gbps | Fiber | Completely | No barriers |

The system will next show the answers you provided in the Connectivity Module in EPC. To complete or edit this information, return to the District's Lightning Bolt Page - "Related Actions" in EPC, then return to the form under My Tasks.

Back | Discard Form | Save & Share | Review FCC Form 471

Select "Review FCC Form 471."

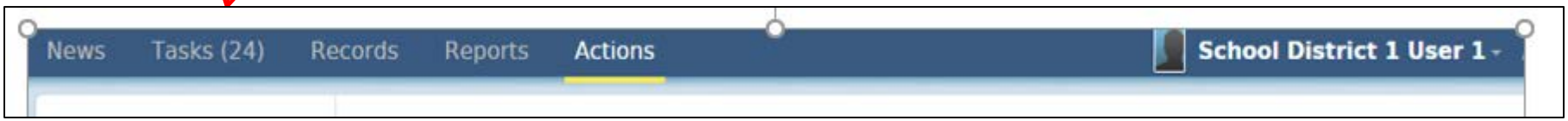
# Creating the Draft Form PDF




Select "Yes" and in about 30 seconds, the system will send a "Task" to your EPC account as well as an e-mail notifying you that the Task has been created.

# Where to See the Draft Form PDF Task

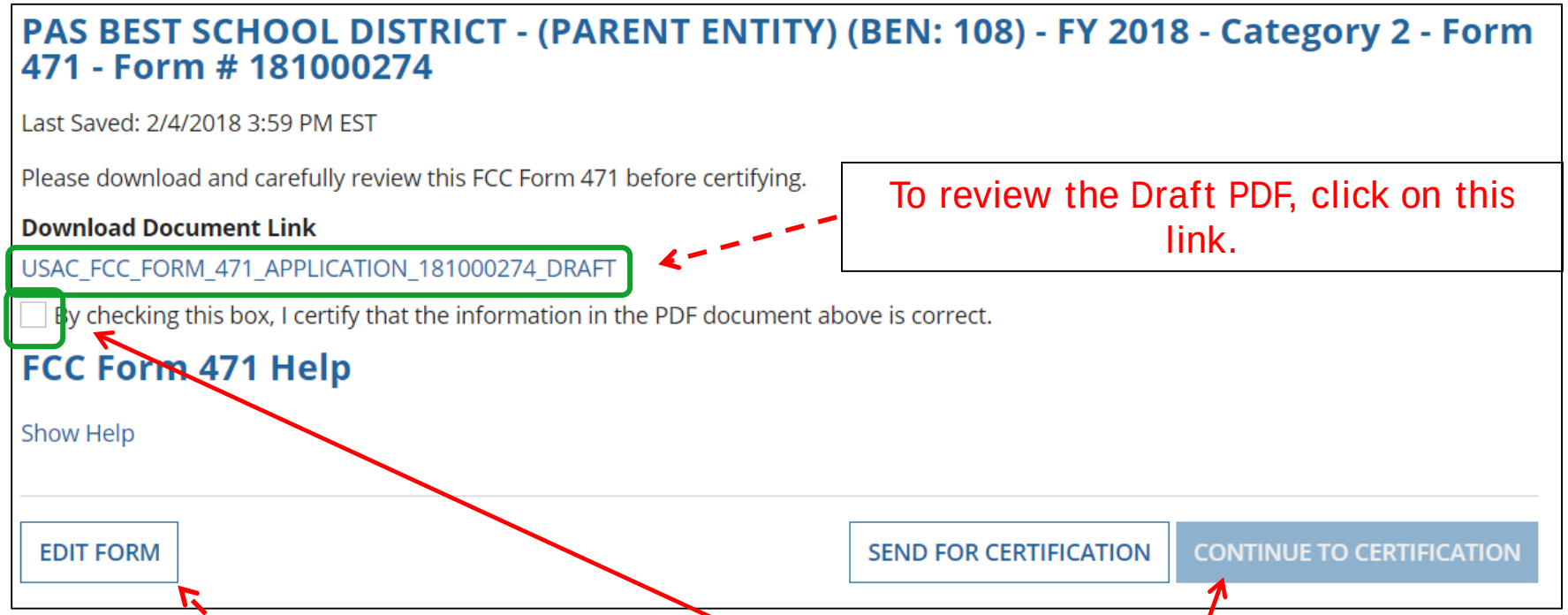
To find the PDF of your Draft Form 471,
click on “Tasks” or in the “My Tasks” list on your Landing Page.




## My Tasks

| Name | Received | Status | Deadline |
|---|---|---|---|
| Review PDF for FCC Form 471 - #181000274 - FY 2018 - Category 2 - Form 471 | 2/4/2018 4:08 PM EST | Assigned | |

# Reviewing the Draft 471

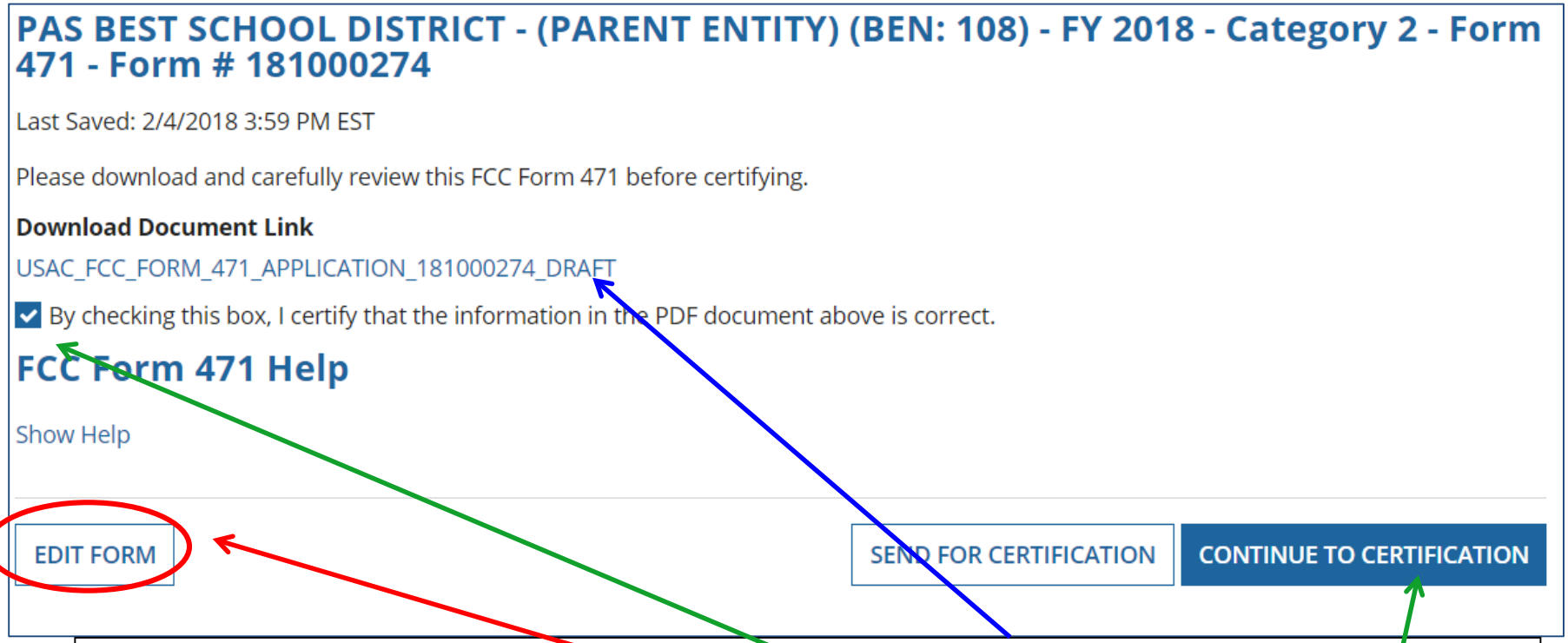



To review the Draft PDF, click on this link.

If anything needs changed on the Draft 471, click on "Edit Form."

To continue to the Certification Page and submit the 471, check the box and click "**Continue to Certification.**"

# Review PDF & Continue to Certification Page

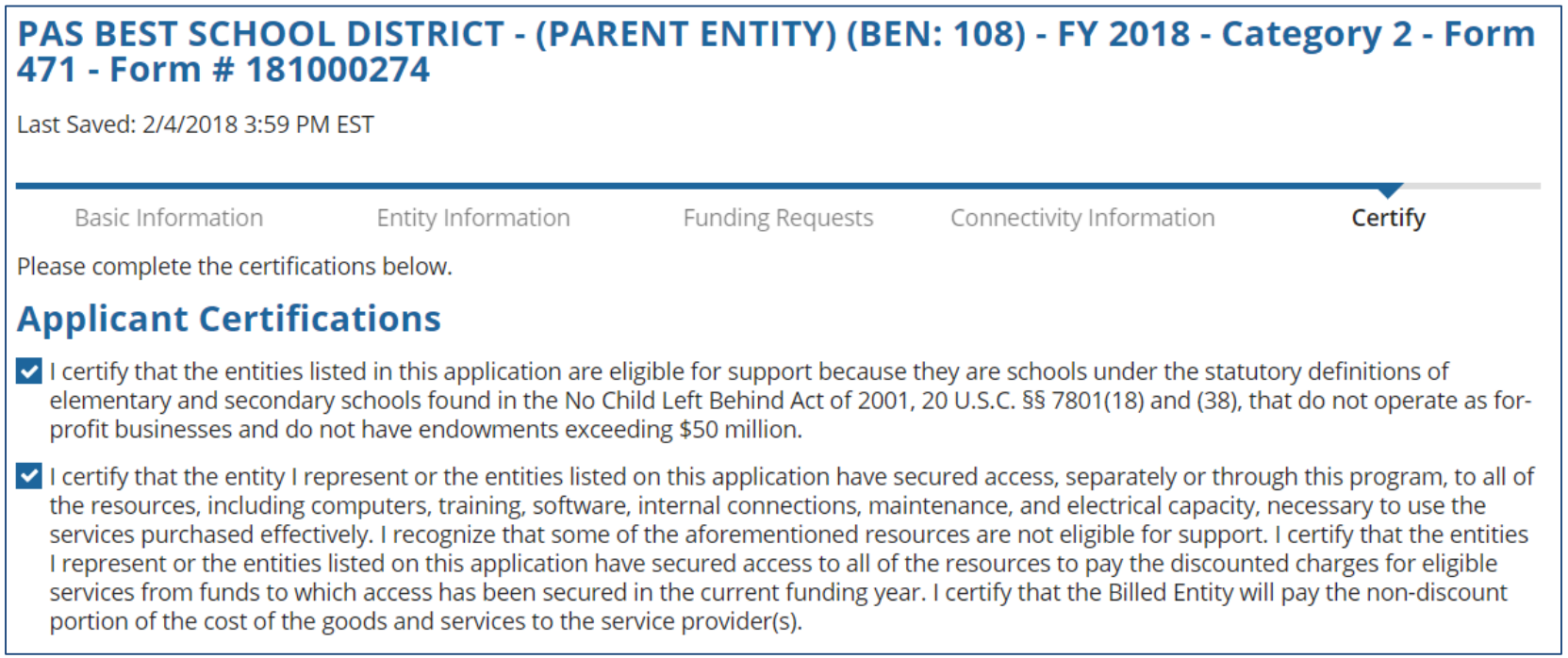



- To see the PDF of your Form 471, click on the **blue** link.
- If you need to make edits, click "**Edit Form**" to re-enter the form.
- If you are ready to submit the form, check the box and "**Continue to Certification**."

You must have Full Rights in order to certify the form.

# Certification Page

Read and check all of the certification boxes on this page.



**PAS BEST SCHOOL DISTRICT - (PARENT ENTITY) (BEN: 108) - FY 2018 - Category 2 - Form 471 - Form # 181000274**

Last Saved: 2/4/2018 3:59 PM EST

Basic Information | Entity Information | Funding Requests | Connectivity Information | **Certify**

Please complete the certifications below.

## Applicant Certifications

☑ I certify that the entities listed in this application are eligible for support because they are schools under the statutory definitions of elementary and secondary schools found in the No Child Left Behind Act of 2001, 20 U.S.C. §§ 7801(18) and (38), that do not operate as for-profit businesses and do not have endowments exceeding $50 million.

☑ I certify that the entity I represent or the entities listed on this application have secured access, separately or through this program, to all of the resources, including computers, training, software, internal connections, maintenance, and electrical capacity, necessary to use the services purchased effectively. I recognize that some of the aforementioned resources are not eligible for support. I certify that the entities I represent or the entities listed on this application have secured access to all of the resources to pay the discounted charges for eligible services from funds to which access has been secured in the current funding year. I certify that the Billed Entity will pay the non-discount portion of the cost of the goods and services to the service provider(s).

# Certification Page

## Total Funding Summary

**Below is a summary of the total line item costs on this FCC Form 471:**

| Summary | |
|---|---|
| Total funding year pre-discount eligible amount on this FCC Form 471 | $132,000.00 |
| Total funding commitment request amou | $112,200.00 |
| Total applicant non-discount share of the | $19,800.00 |
| Total budgeted amount allocated to resc support | $850,000.00 |
| Total amount necessary for the applicant to pay the non-discount share of eligible and any ineligible amounts | $869,800.00 |
| Are you receiving any of the funds directly from a service provider listed on any of the FCC Forms 471 filed by this Billed Entity for this funding year? | No |
| Has a service provider listed on any of the FCC Forms 471 filed by this Billed Entity for this funding year assisted you in locating funds needed to pay your non-discounted share? | No |

Enter the amount you're spending on technology for FY 2018, less any E-rate eligible costs. Don't enter "$0."

Always select "No."

Always select "No."

# Certification Page

- [x] I acknowledge that FCC rules provide that persons who have been convicted of criminal violations or held civilly liable for certain acts arising from their participation in the schools and libraries support mechanism are subject to suspension and debarment from the program. I will institute reasonable measures to be informed, and will notify USAC should I be informed or become aware that I or any of the entities listed on this application, or any person associated in any way with my entity and/or the entities listed on this application, is convicted of a criminal violation or held civilly liable for acts arising from their participation in the schools and libraries support mechanism.
- [x] I certify that if any of the Funding Requests on this FCC Form 471 are for discounts for products or services that contain both eligible and ineligible components, that I have allocated the eligible and ineligible components as required by the Commission's rules at 47 C.F.R. § 54.504.
- [x] I certify that the non-discount portion of the costs for eligible services will not be paid by the service provider. The pre-discount costs of eligible services featured on this FCC Form 471 are net of any rebates or discounts offered by the service provider. I acknowledge that, for the purpose of this rule, the provision, by the provider of a supported service, of free services or products unrelated to the supported service or product will be considered a rebate of some or all of the cost of the supported services.

**FCC Form 471 Help**

Show Help

BACK

CERTIFY

Check all boxes and “Certify” to submit the form to USAC.

# Confirmation Page

## You have successfully filed FCC Form 471 #181000274 for FY 2018

### Certification Date

2/4/2018 4:16 PM EST

### Authorized Person

**Name** School District 4 User 1

**Title** Administrator

**Employer** PAS BEST SCHOOL DISTRICT - (PARENT ENTITY)

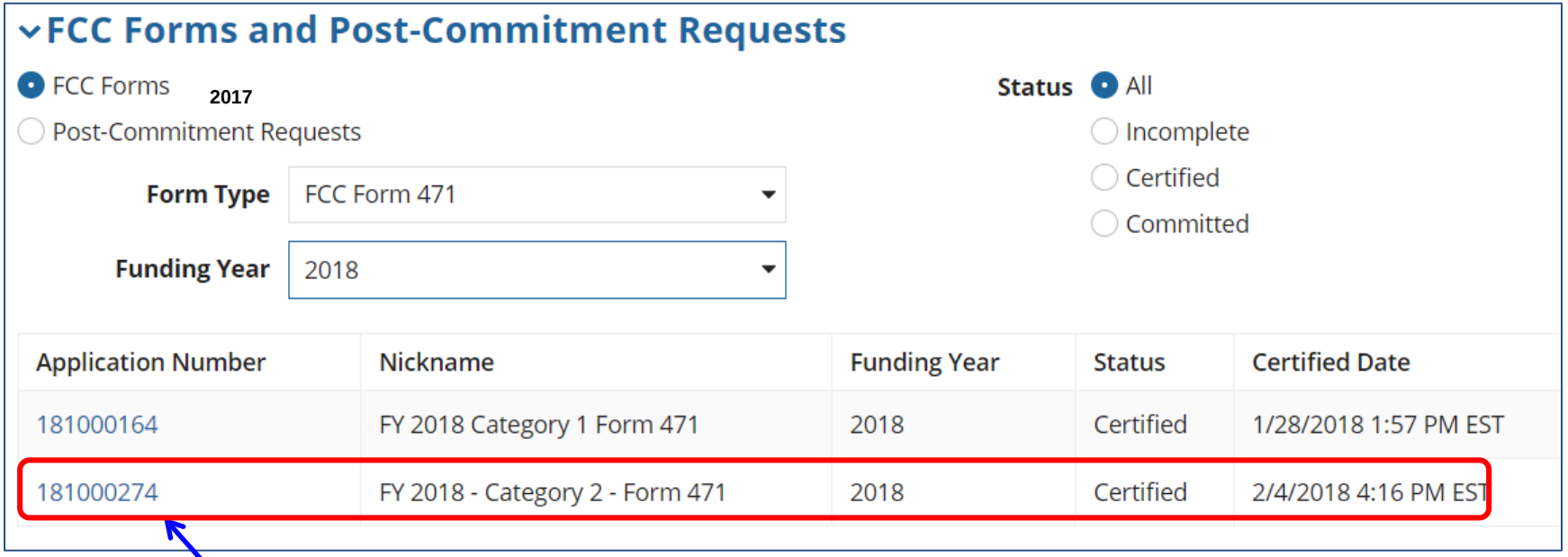
**Address** 100 Main Street
Springfield, PA 19064

**Phone** 555-555-5444

**Email** school.district4.user1@mailinator.com

This screen confirms that you successfully filed and certified Form 471.

# To Print a Final Copy of Your Form 471




On your EPC Landing Page, scroll to the bottom under FCC Forms.
Select "Form 471" and "Certified" to see a list of your FY 2018 certified 471s.
Click on the blue 471 Application Number.

# Printing a Final Copy of Your Form 471

## Application Information

**Nickname** FY 2018 - Category 2 - Form 471
**Application Number** 181000274
**Funding Year** 2018
**Window Status** In-Window
**Category of Service** Category 2

**Created Date** 2/4/2018 12:16 PM EST
**Created By** School District 4 User 1
**Certified Date** 2/4/2018 4:16 PM EST
**Certified By** School District 4 User 1
**Last Modified Date** 2/4/2018 4:16 PM EST
**Last Modified By** School District 4 User 1

## Billed Entity Information

PAS BEST SCHOOL DISTRICT - (PARENT ENTITY)
100 Main Street
Springfield, PA 19064
555-555-5555
school.district4.user1@mailinator.com

Scroll to the bottom of the page and click on "Original Version" to view a final copy of your Certified Form 471.

## Consultant Information

There are currently no consulting firms associated with your organization. If this is in error, please update your organization profile.

## Contact Information

**Name** School District 4 User 1
**Email** school.district4.user1@mailinator.com
**Phone Number** 555-555-5444

## Holiday / Summer Contact Information

**There is no Holiday / Summer Contact Information for this FCC Form 471.**

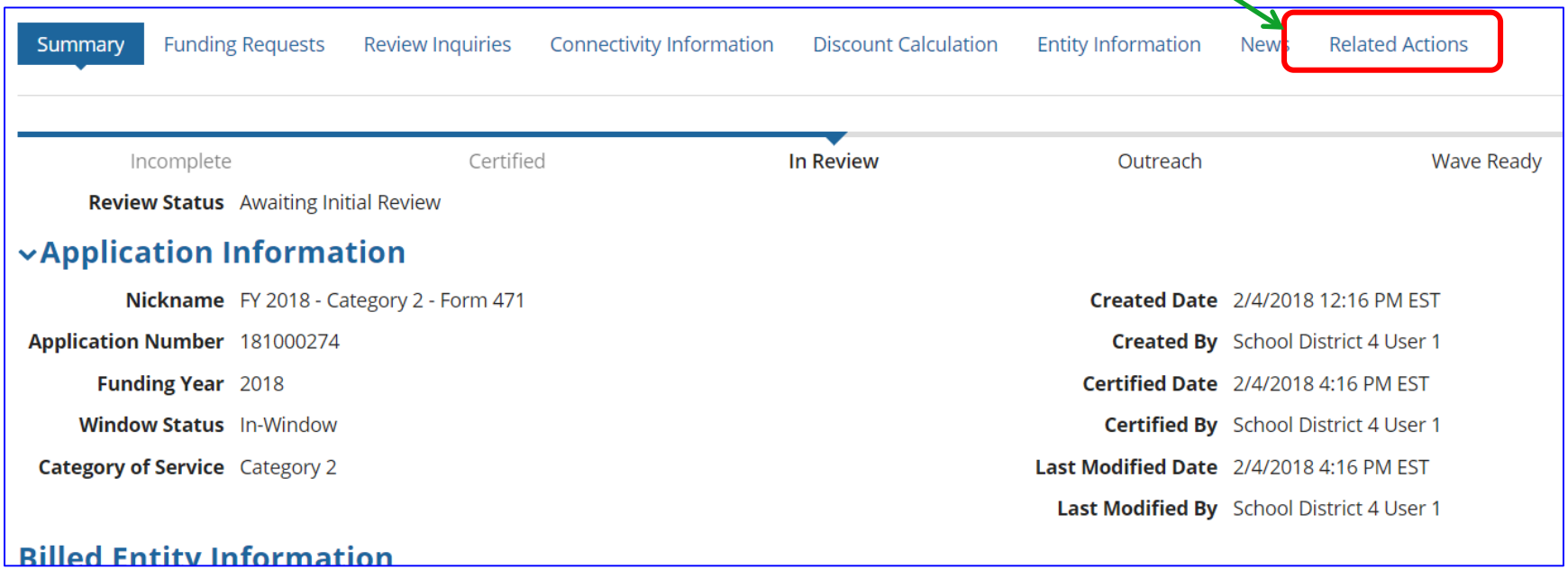
## FCC Form 471 Generated Documents

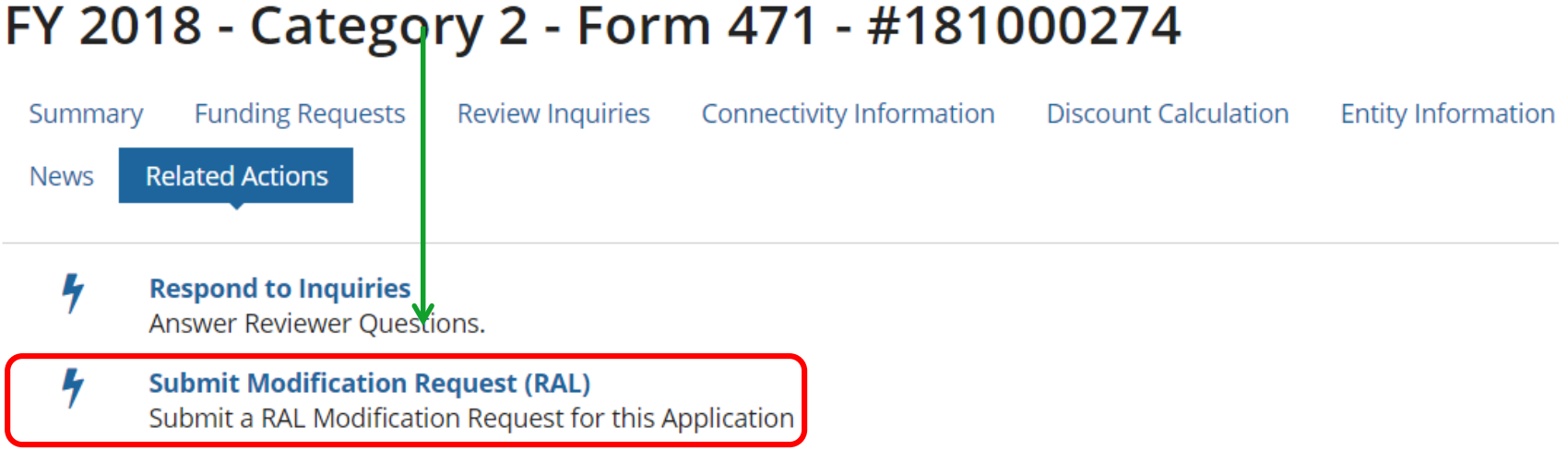
FCC Form 471 Version

Original Version

# To Submit a 471 Correction/Change

To make corrections to a submitted 471, click “Related Actions”



# To Submit a 471 Correction/Change

Then "Submit Modification Request (RAL)