

E-Rate Training for Library Beginners –

Funding Year 2025



Agenda for Today

- Overview
 - Eligible entities
 - E-Rate Productivity Center (EPC)
 - Discount Calculations
 - Eligible Services and Equipment
 - What's New for FY2025
 - Category 2 Budgets
 - Application Process, step-by-step
- Copy of presentation available at: http://E-Ratepa.org/?page_id=745

What is E-Rate?

- Annual \$3.9 billion federal program
 - Funding does not come from federal budget
- Provides 20-90% discounts on eligible services and equipment
- Bedrock principles:
 - All equipment and services must be competitively bid on USAC website for at least 28 days
 - Applicants **MUST** pay their non-discounted share (cannot be waived)
 - For example, if your discount is 60%, you must pay 40%
- FCC sets all rules and policy
 - USAC (SLD) manages the program/application process
- Program is highly deadline restrictive
- Application process begins 6-12 months before funding year begins

How to Be E-Rate Successful

- Read (and distribute) listserv messages
 - Are you on the PA E-Rate listserv? (e-mail Julie, if not)
 - Are you subscribed to the USAC E-Rate Newsbrief?
<https://fe391570756406797d1477.pub.s10.sfmc-content.com/3n2usens2cz>
- Document and retain everything
 - Stay organized!
- Use PA E-Rate website: www.E-ratepa.org
 - Helpful Documents/Guides
- Have patience



What Entities are Eligible in PA?

- Public libraries eligible for LSTA funding
 - Includes bookmobiles
- Non-Instructional Facilities (NIFs)
 - Admin buildings, data centers, etc.
 - Only eligible for broadband/internet services (not equipment)
- Every “organization” has an E-Rate Billed Entity Number (BEN)
- Every “building” must have an Entity Number
 - Call USAC to obtain Entity Numbers for new buildings (school or NIF)



E-Rate Classifications for Various Libraries

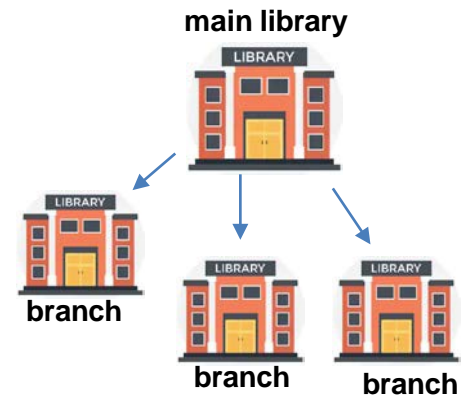
1. Independent Library

- Stand-alone library, not a branch



2. Library System

- Defined as library that has branches



3. Consortium

- Can be made up of one or more independent libraries
 - Consortia “lead” may or may not be an actual library
- Regional (Federated) library systems that procure services on behalf of independent libraries would be considered a “consortium” under E-rate rules
 - Not a “library system” as they’re known in PA



EPC – E-Rate Productivity Center

- Account and application management portal
 - Launched in FY 2016
- All E-Rate forms, letters and interactions are based in EPC
- Within EPC Portal is...
 - **E-Rate Main**
 - **E-Rate Form 472** BEAR Reimbursement System – now also in EPC
 - **ECF** = Emergency Connectivity Fund (appropriated program)
 - **CPP** = Cybersecurity Pilot Program
- Every “Billed Entity” has a BEN EPC Account
- Every BEN Account has “Users”
 - One of the Users is the EPC Account Administrator (AA)
 - ‘Related Actions’ is where most account management tasks are found
- Call USAC at 888-203-8100 for EPC assistance

Discount Calculations



Library Discount Calculations

- **Independent Library** (most PA libraries):
 - Discount based on the % of students eligible for the NSLP in the school district in which that library is located, and whether the library is located in an urban or rural area
- **Library Systems:**
 - Discount based on the % of students eligible for the NSLP in the school district in which the system's main library is located
 - and*
 - The % of libraries in rural areas
 - If more than 50% are located in rural areas, then the rural discount should be used
- **PA Federated Library Systems**
 - Made up of several independent libraries
 - Where System procures shared services, such as WAN/Internet
 - System would file as a **Consortium**
 - **Discount calculate by taking simple average of all consortia members' discounts**

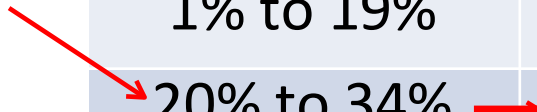
Discount Matrix

Category 1

Category 2

Income % of students in the school that qualify for the NSLP...	Category 1 Urban Discount	Category 1 Rural Discount
Less than 1%	20%	25%
1% to 19%	40%	50%
20% to 34%	50%	60%
35% to 49%	60%	70%
50% to 74%	80%	80%
75% to 100%	90%	90%

Category 2 Urban Discount	Category 2 Rural Discount
20%	25%
40%	50%
50%	60%
60%	70%
80%	80%
85%	85%



Calculating Consortia Discounts

- Based on the **simple average** of all consortia members' discounts

Consortia Members	Member Calculated Discount
District A	50%
District B	60%
District C	80%
Consortia Discount	63%
	$(50+60+80)/3$

- Consortia are only entities that will have non-matrix discount
- Most common consortia are IU RWANs and Federated Library Systems' RWANs

E-Rate Eligible Services and Equipment

E-Rate Eligible Services List and FAQs:

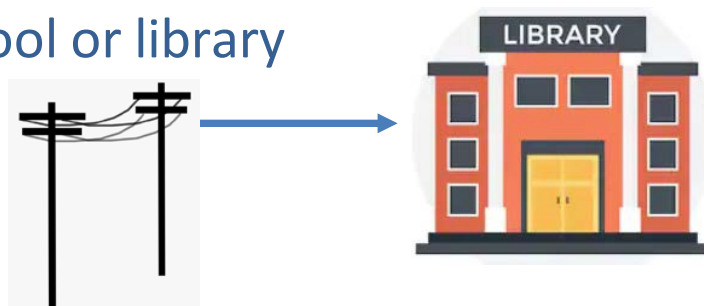
<https://www.usac.org/E-Rate/applicant-process/before-you-begin/eligible-services-list/>



Categories of Service

- **Category 1** – Services that go TO the school or library

- Subcategories:
 - Data Transmission Services (fiber, coaxial cable, etc.)
 - Internet Access
- Maximum discount is 90%
- No E-Rate funding caps
- Services must be received July 1 – June 30
- All buildings are eligible for Cat 1 funding



- **Category 2** – Services/equipment that go INSIDE the library

- Subcategories:
 - Internal Connections
 - Basic Maintenance of Internal Connections
 - Managed Internal Broadband Services (MIBS)
- Maximum discount is 85%
- Subject to 5-year “C2 Budget” (funding cap)
- Equipment can be received April 1 – Sept 30 (18 months)
- **NIFs are NOT eligible for Cat 2!**



C1: Data Transmission Services

Most Common:

- Leased Lit Fiber
- Cable Modem/DSL/FIOS
- Bundled Internet Access (with transport)

Other Eligible Fiber:

- **Leased Dark Fiber *** (Someone else owns it but you're responsible for lighting it)
- **Self-Provisioned Fiber** (Build/Own Your Own Network) *
- Special Construction Charges
 - Costs for vendor to build out network
- Installation Charges
 - One-time charge to "turn on" service

* Additional bidding requirements apply

Also Eligible (less common):

- Microwave Service
- Broadband over Power Lines
- DS-1, DS-2, DS-3
- OC-1, OC-3, OC-12, OC-n
- ISDN
- Satellite Services
- Stand-Alone Internet (no transport cost if own the fiber to your buildings, or a different vendor provides the circuits)
- Wireless data plans * (typically used for bookmobiles) where plans are the most cost-effective option

• **Off-Premise Hotspots...New for FY2025**



Not Eligible:

- Voice services
- Duplicative (redundant) services
- Filtering

CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option (CABIO)

- Schools and libraries seeking “Commercially-Available Business Class Internet Services” are not required to file a Form 470
- Typically, only Cable-Modem, DSL, or FIOS Internet Service
- Commercially Available means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries
 - Basically, this is an internet service that is available on a vendor’s website for its business customers
- Minimum speeds must be 100 Mbps downstream and 10 Mbps upstream
- Cost must be \$3,600 or less annually (pre-discount)
 - Cost must be per-building and cannot be averaged across multiple buildings
 - \$3,600 includes any installation costs, equipment rental, taxes and fees

The CABIO option is geared (but not limited) to small libraries and small non-public schools or NIFs using cable modem-type services

What's Eligible for Category 2 Funding?



3 Sub-Categories for C2

- Internal Connections (main)
- Basic Maintenance (BMIC)
- Managed Internal Broadband Services (MIBS)

Internal Connections

- Wireless Access Points/Controllers
- Network Routers & Switches
- In-Building Structured Cabling
- Caching Servers
 - Only eligible servers
- Firewall Appliances
- Racks and UPSs
 - That support eligible equipment only
- Equipment licenses
 - Pre-paid, multi-year licenses can be requested in first year
- Cloud-based functionality of eligible equipment
- Operating system software to support eligible equipment
- Installation and configuration
 - If wanted, be sure to specify this in your 470/RFP
- Taxes and fees
- Basic training on use of equipment
- **Not eligible:**
 - **Cybersecurity!!!!!!**
 - Storage Devices
 - Voice/Video Components
 - End User Devices
 - Security cameras
 - Advanced firewall functions, like anti-spam, anti-virus, etc.

Internal Connections Purchase Timeline

- Equipment can be purchased as early as April 1, prior to funding year start
 - For example, applicants can purchase equipment on April 1, 2025 for FY 2025, even though the funding year doesn't begin until July 1, 2025
 - **However...** vendors/applicants cannot be reimbursed from USAC until July 1
 - Applicants that purchase equipment prior to receiving funding commitment letter are risking paying full price
- Equipment can be purchased as late as September 30, following the end of funding year
- Allows applicants two full summers to install equipment

FY2025 - Non-Recurring Services/Equipment Purchases - April 1, 2025 - Sept 30, 2026																	
			FY2025 - Recurring Service - July 1, 2025 - June 30, 2026														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2025	2025	2025	2025	2025	2025	2025	2025	2025	2026	2026	2026	2026	2026	2026	2026	2026	2026

Basic Maintenance (BMIC)

- Special eligibility conditions:
 - 100% eligible = basic tech support, configuration changes
 - Costs common when purchasing new equipment
 - Not eligible = Next Business Day equipment replacement
 - Conditionally eligible = repair of equipment, cable maintenance
 - E-Rate will commit based on amount of contract
 - BUT.... Will only reimburse for time/parts used
- Multi-year, pre-paid contracts must be amortized
 - Cannot apply for full cost of multi-year BMIC contract in Year 1
 - Must amortize and request discounts for that year, annually
- Can only be for services/work performed during 12-month funding year (7/1/2025 – 6/30/2026)
 - Does not follow the 4/1/2025 – 9/30/2026 schedule



For these reasons, I do not recommend applicants use their C2 budgets for BMIC.

Rather, use C2 budgets for eligible equipment/installation.

Mixed Functionality

Some equipment has **mixed** BMIC & Internal Connections (IC) functionality

- Some vendor licenses may include both **BMIC & IC** functionality such as **Right-to-Use (RTU)** and **Maintenance Services on the same license**.
****This is typical when requesting renewal licenses!!**
- Split the license based on functionality (i.e., RTU and maintenance) into separate FRNs for BMIC and IC
 - Contact the manufacturer or [USAC's Customer Service Center \(CSC\)](#) to obtain the breakdown for specific functionality that is included in a specific mixed services license

Tip 1: During your competitive bidding process, if you are seeking bids for Right-To-Use functionality and maintenance subscription services, be sure to post for all applicable service types on the FCC Form 470. (**i.e., IC and BMIC**)

Tip 2: If it contains features of **both** types, you should work with the vendor to determine if a separate identifiable price exists for the different aspects

Managed Internal Broadband Services

- Managed Internal Broadband Services (MIBS)
- Covers the operation, management, or monitoring of a LAN
- 2 Options:
 - Paying an outside vendor to own/manage the equipment
 - Paying an outside vendor to manage school-owned equipment
- Subject to the C2 budget caps
- Traditionally used by small schools/districts and libraries that don't have their own IT staff

Library Small C2 Bidding Exemption

- Beginning in FY 2024, libraries are exempt from bidding Category 2 equipment or services if:
 - Total, pre-discount amount is \$3,600 or less
 - Total cost is per library and cannot be averaged over multiple libraries
 - Cost-effective rules still apply
 - Contracts still must be signed prior to filing the Form 471

Equipment Transfer/Disposal Rules

- **Transfers:** E-rate funded equipment may be transferred between eligible schools or libraries within the BEN
 - If equipment is transferred between buildings within 5 years from date of purchase, applicants must record reason and date of transfer and update asset inventory
 - No notice to USAC is required
 - Asset inventory must be retained for 10 years from date of purchase
- **Disposal:** Equipment may be disposed of, sold, transferred, etc. after 5 years from the date of installation
 - No notice to USAC required but asset inventory must be updated

NIFs Not Eligible for C2 Funding

- Non-instructional facilities (NIFs) are not eligible for C2 funding/equipment that is specific to their building
- Shared equipment may be housed at a NIF
- For example:
 - A Wireless Controller may be housed within a NIF
 - Wireless Access Points in a NIF may not be purchased with E-Rate funds
 - These would be building-specific and not equipment that is shared with other schools

What's New for FY2025?



Off-Premises Wi-Fi Hotspots: Now E-Rate Eligible



- On July 18, 2024, the FCC adopted a Report and Order ([FCC 24-76](#)) making **Wi-Fi hotspots and mobile wireless Internet services for off-premises use** eligible for E-Rate program support.
- If a library patron or student is using an E-Rate-funded hotspot on their **own** laptop (not a library or school-owned laptop), the library or school is not required to filter the Internet.
- 3-year C1 budget, \$90 device /\$15 plan caps, 45% annual limit
- **Cap on Quantity of Devices/Service Plans**
 - Schools - cap is 20% of full-time student enrollment
 - Libraries - cap is 5.5 hotspots for each 1000 square feet
- **Taxes are not included in the capped amounts.**
- **But activation and configuration costs are included in the capped amounts.**
- Wi-Fi hotspots (device) will be **eligible as Category One (C1) network equipment** necessary to make C1 wireless Internet services functional.

FY 2025: Off-Campus Wi-Fi Hotspots

- **3-Year Budgets**

- 3-year, pre-discount combined hotspot/service budget
- Applicants may request up to 45% of their 3-year budget in a single funding year.
- First hotspot budget cycle is FY 2025 – FY 2027 (and a new budget cycle will be established beginning in FY 2028)



- **Budget Tool:** <https://e-ratepa.org/wp-content/uploads/2024/10/Hot-Spot-3-Year-Budget-Calculation-Worksheet-.xlsx>

- Fill in **yellow cells** to see your 3-year hotspot budget and 45% calculation

LIBRARIES		Enter data in yellow cells						
A	B	C	D	E	F	G	H	
FY 2025 C2 Square Footage	5.5 hotspots per 1,000 square feet	FY 2025 E-rate C1 Discount	(a*b*c)	Rounded up to Nearest 10	3-year multiplier - \$630	Hotspot 3-Year Pre-Discount Budget (\$630 * E)	Most Pre-Discount You Can Request in Any Year - 45% of 3 year budget	
18,951	0.0055	70%	73	80	\$630	\$50,400	\$22,680	<i>Example C</i>
3,200	0.0055	90%	15.84	20	\$630	\$12,600	\$5,670	<i>Example D</i>
25,000	0.0055	80%	110	110	\$630	\$69,300	\$31,185	

Category 2 Budget Calculations



Category 2, 5-Year Funding Caps

- Current C2 budget cycle – Funding Years 2021 – 2025
 - All C2 budgets will reset in FY 2026 and no funding will be carried over
 - C2 budgets are *pre-discount*
 - Applicants' E-Rate discounts then apply

C2 Budget Multipliers:

Single Schools:

\$167 x total enrollment OR \$25,000, whichever total budget is greater

School Districts:

\$167 x total district enrollment, OR

\$25,000 x total number of schools in the district

– Whichever total budget is greater

Independent Libraries:

\$4.50 x total square footage OR \$25,000, whichever total budget is greater

Library Systems:

\$4.50 x total square feet of all library branches OR \$25,000, whichever total budget is greater

Category 2 Pre-Discount Budget Example

5-Year C2 Budget Cap*	E-Rate Discount	E-Rate Will Pay:	District's Share %	District Must Pay:
\$204,475	60%	\$122,685	40%	\$81,790

* The C2 Budget Cap is the **pre-discount price**. E-Rate discounts will then apply **on top of** the budget cap. In this example, district would still owe their 40% non-discounted share

- Future funding years: To determine what **“remains”** in a C2 budget for future years in the C2 “cycle”, take the 5-Year Budget Cap and subtract the pre-discount amounts of what has been “committed” in the previous year(s) of the C2 cycle

What is YOUR Remaining Category 2 Pre-Discount Budget for Current 2 Budget Cycle?

Calculating Remaining C2 Budgets

FY 2025 is final year for current C2 Budget Cycle!

How can you see what's your remaining Category 2 Budget for this C2 cycle?

A) Check Julie's List (as of 9/16/2024)- <https://e-ratepa.org/?p=35679>

B) Check USAC Real-Time Data

- 1) Enter BEN to filter just your entity's data
- 2) Summary Table will appear

Filters (2) ✕
Clear All

State

Applicant Type

City

Billed Entity Name

BEN

Consulting Firm Name (CRN)

C2 enrollment currently in EPC

5-Year Pre-Discount C2 Budget

Amount of any "still pending FRNs" in FY 2021, 2022, 2023, 2024

Amount "committed" in FY 2021 - FY 2024

Remaining available C2 Budget

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



Data Used for Category 2 Budgets

- Enrollment data entered in separate location in EPC (different from discount calculations)
- Why? Enrollments are set at first year you apply for C2 during that Category 2 Budget Cycle
- Not required to update annually
- CAN update if it will increase your C2 budget
 - Must then ask for C2 Budget Recalculation from USAC

Where to update C2 enrollment data?

>>> EPC Landing Page > District Name > Manage Organization > Scroll to bottom of page



The Application Process



Application Process Overview

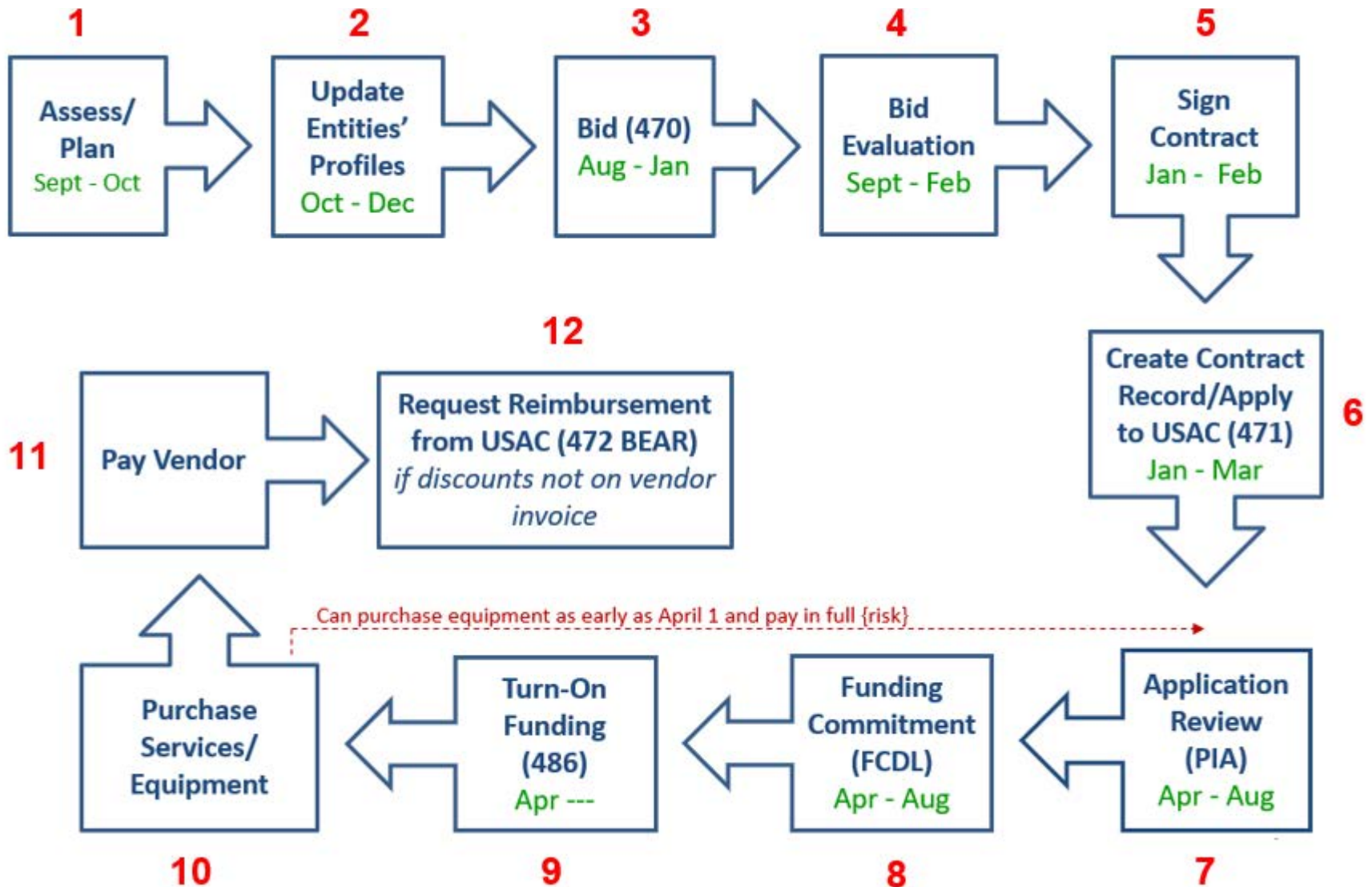
E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - November
2) Update EPC Profiles - Admin Window	Oct - early January
3) Bid All New Services/Equipment – Form 470	Now - December
4) Bid Evaluation	January/February
5) Board Approval/Sign Contracts	January/February
6) Request E-Rate Funding – Form 471	Mid Jan. – March 25? (deadline TBA)
7) Application Review – PIA	March - August
8) Funding Commitment – FCDL	April - August
9) Turn-On Funding/CIPA Compliance – Form 486	FCDL receipt – October 29
10) Receive Services	July 1, 2025 – June 30, 2026
11) Pay Vendor	July 1, 2025 – June 30, 2026
12) Submit Invoice to USAC (one of two options) – Form 472 BEAR if paid vendor bill in full or – Vendor submits Form 474 SPI to USAC if you received discounted bills	October 28, 2026 (deadline)

FY 2025 Application Cycle

- Funding years are named for the year in which they begin
 - FY 2024 = July 1, 2024 – June 30, 2025
 - FY 2025 = July 1, 2025 – June 30, 2026
- The application process begins 6-9 months ahead of start of next funding year
- May be dealing with 3 funding years at one time (**Don't panic!!!! It's doable**):
 - FY2023 BEAR - Oct 28, 2024 deadline for recurring service
 - FY2024 Form 486 if FCDL received before July 1st for recurring service
 - FY2025 Form 470 if new service/equipment is needed

		FY2025 - Non-Recurring Services/Equipment Purchases - April 1, 2025 - Sept 30, 2026																																			
		FY2025 - Recurring Service - July 1, 2025 - June 30, 2026																																			
Form	Description	Sept 2024	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	June 2025	July 2025	Aug 2025	Sept 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026	Mar 2026	Apr 2026	May 2026	June 2026	July 2026	Aug 2026	Sept 2026	Oct 2026	Nov 2026	Dec 2026	Jan 2027							
470	Competitive Bidding Window (min. 29 days)	July 1, 2024 - Mid February 2025																																			
AW	Administrative Window (EPC Profile Update)	Early Oct - Mid Jan. 2024																																			
	Newly Signed Vendor Contracts Uploaded in EPC	Prior to starting the Form 471																																			
471	Funding Request Application Window	Mid Jan - Late March 2025																																			
PIA/FCDL	PIA Review/Funding Decision Letters (FCDL) Issued								April 2025 - Sept 1, 2025																												
486	CIPA Certification/Turning on Funding (deadline is 120 days from the start of service, or date of FCDL)								For most recurring service requests, deadline is by Oct. 29, 2025 if FCDL is received prior to July 1st.																												
472	BEAR Deadline - Recurring Service (120 days from the last day to receive service)																									Oct. 28											
	BEAR Deadline - Non-Recurring Service (120 days from the last day to receive service)																														Jan. 28						

Steps 1 - 12



Step 1: Assess Need & Plan



- **When?** September/October/November
- **Category 1:** Review existing contracts to determine when they expire
 - List of C1 Contract Expiration Dates: <https://e-ratepa.org/?p=35734>
 - Extend, if options available
 - Must have documentation to vendor of request to extend
 - If contract expiring, decide if upgraded services are needed
- **Category 2:** Determine what equipment/wiring is needed for each building for next funding year
 - Research options, prepare bid-list

Step 2... Update Entities' Profiles

- **Update Entities' Profiles during the Administrative Window each fall**
 - Approx. 3-month period when schools must update enrollment/NSLP data for each school
 - And update Category 2 Enrollment if it has increased
 - Data cannot be changed once Admin Window closes (but you can provide updated info on the Form 471)
- Confirm all entities, including NIFs, are in EPC portal
 - Contact USAC's Customer Service Center (CSC) at 888-203-8100 to make entity adjustments



Step 3: Posting the Form 470

Form 470 Competitive Bidding Form

- Notifies vendors of services and equipment for which you are seeking proposals
 - All equipment/services for which you will seek funding on the Form 471 must have been posted on a Form 470
- Vendors are invited to submit bids/price quotes for 28 days from the date of certifying your Form 470
 - List **bid due date** in the narrative text box, along with **any disqualification factors**
- You are NOT obligated to purchase any service/equipment listed on Form 470
- Category 1 and Category 2 can be filed on the same 470



When Must a Form 470 be Posted?

1. Month-to-Month Services

- No contract exists – these are mostly cable modem-type services
- File annually unless using CABIO

2. New Contracts

- File before signing any new contract
- If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2026, you are **not** required to file a Form 470 for FY 2025

3. Bandwidth Upgrades

- If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract

Contract Extensions

- Permitted but must have been in original contract and must have a definitive end
 - **OK:** For example, a 3-year contract, with two 1-year renewals. Will not require new 470 until the end of 5 years
- Must notify vendor before filing Form 471 if you want to exercise one of your contract extensions
 - Can be as simple as an e-mail; some vendors want contract amendment
 - USAC will ask for this during your application review

Requests for Proposals (RFPs)

- USAC considers any bidding document provided to vendors an RFP
- RFPs not required for libraries, except for:
 - When seeking dark fiber or self-provisioned fiber projects
- If issuing an RFP, all documents that constitute that RFP must be uploaded with Form 470 at time of filing
 - Cannot cite to a website bidding advertisement
 - **Important:** Any addenda or other documents given to vendors after the Form 470 is filed must be uploaded to existing 470
 - Must restart 28-day clock if any changes are made to the original RFP
- Vendors cannot provide RFP language or bid lists

When to File the Form 470

Deadline: Form 470 must be posted online at least 29 days before the Form 471 window close

For example:

- If Form 471 deadline is March 25, 2025; therefore...
- February 25, 2025 = 470 Deadline
 - DO NOT wait this long! Gives you 1 day to evaluate bids, negotiate contracts, sign contracts, and then file the Form 471 by the 471 deadline
 - File 470 before December 1, if possible
- Helpful Form 470 Guides: http://e-ratepa.org/?page_id=754
 - Helpful Form 470 and RFP Narrative Guide
 - C1 Form 470 Filing Guide
 - C2 Form 470 Filing Guide – Public Schools
 - C2 Form 470 Filing Guide – Non-Public Schools/Libraries
- **If you need to file a Form 470, please plan on attending training that will be offered in November.** To register, go to https://e-ratepa.org/?page_id=745

During the Bidding Period...

- After the Form 470 has been posted online, vendors submit proposals directly to the school
- Proposals must be accepted for a minimum of 28 calendar days
 - Applicants should specify a bid deadline in the Form 470/RFP
 - Can be longer than 28 days
- Vendors will contact you if they need additional information
- When contacted by a vendor, you must indicate your willingness to receive a proposal for services listed on Form 470
 - **Do NOT say you are just going to stay with your current vendor**
- May conduct pre-bid meeting with vendors

Step 4: Evaluating Bids

- After the bid due date (which must be at least 29 days after 470 is posted), applicant must review all qualified bids received for all services or equipment
- Must create and retain bid evaluation matrix

Services: Price of eligible services/equipment MUST be the most heavily weighted factor during bid evaluation


- Brief list of evaluation criteria examples:
 - Quality of proposed solution
 - Cost of ineligible items
 - References
 - Experience with the vendor
 - Ability to meet installation deadline
- Retain all winning and losing bids and all correspondence between applicant and all vendors (winning and losing)
- Helpful Guide: <https://e-ratepa.org/?p=35287>

Disqualifying a Bid

- In order to DQ a bid, the bid disqualification reason must have been stated in the Form 470 or in the RFP
- **DQ reasons must be yes/no (either they complied, or they did not)**
- *Examples:*
 - Vendor must submit a proposal by the deadline stated in the 470/RFP
 - Vendor must bid on all services requested in the 470/RFP
 - Vendor must be authorized to do business in PA
 - Equipment must be compatible with school's existing XXX equipment
 - Be sure to then list the existing equipment in the school or library
 - Equipment cannot be refurbished or “gray market”
 - Vendor must be willing to provide discounted bills
 - Vendor must attend pre-bid walk-through
- When disqualifying a bid, make a note of the exact reason for DQ reason and show where it was stated in the 470 or RFP



Received No Bids?

- Document via an email or file memo that no bids were received
- Existing Services: can continue to receive services from existing service provider
- New Services/Procurement: Solicit bid from willing vendor **(who is not your brother-in-law or other family member)** 
 - Make sure the price is cost-effective
 - Check marketplace options from other vendors in your area or nearby areas
 - Save research and information to justify buying service from this vendor

Bid Evaluation Matrix Example

Factor	Points Available	Vendor A	Vendor B	Vendor C
Proposal Cost		\$750	\$800	\$1000
-- Weighted Points (% to lowest bid)		100%	80%	75%
Price of Eligible Services/Equipment (weighted)	60	60	48	45
Ability to Meet Installation Timeline	20	10	10	20
Quality of Proposed Solution	10	10	10	10
References	10	8	8	5
TOTAL POINTS		88	76	80



Step 5: Signing Contracts

- Contracts (which include hardware quotes) must be signed/dated by the **applicant** before you submit Form 471
 - Unless receiving services on a month-to-month basis
 - Vendor can sign after the Form 471 deadline
 - Obtain board approval, if required, before signing a vendor contract



Step 6a: Upload New Contracts in EPC

- All NEW contracts must be uploaded into the 'EPC Contract Module' before starting the Form 471
-- > EPC Landing Page > Library Name > Contracts from top toolbar

The screenshot shows the EPC interface for the entity '#125300 - MCGUFFEY SCHOOL DISTRICT'. The top navigation bar includes 'Records / Applicant Entities', 'MANAGE ORGANIZATION', and 'CREATE A CUSTOMER SERVICE CA...'. Below this, a secondary navigation bar contains 'Summary', 'Customer Service', 'Modifications', 'Additional Information', 'Discount Rate', 'Contracts', 'FCC Forms', 'FRN Appeals', 'News', and 'Related Actions'. The 'Contracts' menu item is highlighted with a blue arrow pointing down to a 'MANAGE CONTRACTS' button. This button is also highlighted with a blue arrow pointing down to a final row of buttons: 'ADD A NEW CONTRACT' and 'EDIT'.

Purpose of Contracts Module

- When completing a Form 471 Funding Request on the 471, you must indicate how you will be purchasing the requested services – either via a Contract, Tariff or Month-to-Month (MTM) basis:

FRN Contract

How are the services for this FRN being purchased?

Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN.

Contract Tariff Month-to-Month

- If you select ‘Contract,’ you will then be asked to select from the list of your Contract Records from the Contract Module
- The Contract Record selected will then be “linked” to the Form 471 Funding Request

Step 6b: Filing the Form 471

Purpose of the Form 471

- Filed annually by entity that actually pays the bills (the Billed Entity)
- Formally requests E-rate funding commitments from USAC
- Asks detailed questions about services or equipment
- Shows which entities are receiving service
- Shows discount calculations (from EPC)
- Links to a Contract Record(s) to show which Form 470 was used to bid services, contract signing dates, contract amounts, etc.

Funding Requests

- Each separate funding request is assigned a number, called a Funding Request Number (FRN)
- Each FRN is “built” by adding FRN Line Items

When and How Many to File

- **471 Application Window: early January – mid March**
Do NOT miss this deadline!
- Must be filed in EPC
- Category 1 and Category 2 **must** be filed on separate applications
 - Multiple applications are ok within the same category of funding
- Read the listserv messages for important filing tips

Please plan on attending the Form 471 workshop in January/ February



Step 7: PIA Application Review

Program Integrity Assurance (PIA) Review

- USAC team that reviews all applications submitted within the “Form 471 Window” and makes determination on funding approval/reductions/denials
- Checks for rule compliance
 - Eligible services
 - Eligible entities
 - Appropriate discount level
 - Competitive bidding violations
 - Category 2 budget levels
- The 471 main contact will receive an email notification that PIA questions are pending in EPC about their application
- Applicants have 15 days to respond
 - Can seek a single, 1-week extension
- PIA will notify if they intend to deny or reduce request



Step 8: USAC Issues Funding Decisions

FCDL = Funding Commitment Decision Letter



- Funding “waves” are released weekly
 - Goal is to have all “workable” applications funded by Sept 1
- FCDLs emailed to Form 471 contact and EPC AA
- Gives approval decisions for each funding request (FRN) on Form 471
- Can appeal within 60 days if you don’t agree with their decision
 - Appeal to USAC first
 - Can then appeal to the FCC if USAC denies

➤ **Watch PA E-Rate listserve for weekly wave notices!** ◀

Step 9: Filing the Form 486

Form 486 Receipt of Services Form



- Informs USAC that services have (or will) **start**, and
 - Informs USAC that your school or library is **CIPA** compliant
-
- Can only be filed after the FCDL has been issued
 - No applicant or vendor reimbursement forms can be paid until the Form 486 has been submitted and approved
 - Form 486 is **very** simple! Almost all data fields pre-populated
- Deadline:** 120 days after FCDL date or October 29, whichever is later
- Can be filed immediately after FCDL received, **even before July 1**
 - USAC will deduct 1-month's funding for each month the form is late

CIPA Requirements

Any school or library receiving either Internal connections or Internet access must, OR ECF funding for internet access must...

- Filter all Internet access
- Have an Internet Safety Policy that addresses required elements
 - Policy must have been adopted after public hearing
- Schools' (not libraries) Internet Safety Policies must include "... *educating minors about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms and cyberbullying awareness and response.*"
 - This means that schools are required to teach online safety to students as a prerequisite to receiving E-rate funding
- Recipients only receiving telecommunications services are exempt from E-rate CIPA compliance
- Consortium members submit Form 479 to consortium leader certifying compliance in order for consortium lead to submit Form 486

Step 10: Receiving Service/Equipment

- Category 1 services must be delivered between July 1 – June 30
 - Installation may occur as early as January 1 or the contract signing date, whichever is later
 - Services may not BEGIN until July 1
- C2 equipment has an 18-month window to purchase/install equipment
 - May be purchased/installed anytime after **April 1** (3 months before funding year begins)
 - Equipment must be purchased and installed by **September 30** (3 months after funding year is complete)

FY2025 - Non-Recurring Services/Equipment Purchases - April 1, 2025 - Sept 30, 2026																	
			FY2025 - Recurring Service - July 1, 2025 - June 30, 2026														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2025	2025	2025	2025	2025	2025	2025	2025	2025	2026	2026	2026	2026	2026	2026	2026	2026	2026

Step 11: Paying for Equipment/Services

- Applicant's choice – one of two options
 - **Discounts** on bills (vendor invoices USAC)
or
 - **Reimbursement** process (applicant pays bills in full, then invoices USAC)
- Must select one or the other for entire year for each FRN
- If you want discounted bills, notify your vendor after contract signing, as soon as you are funded
 - Vendors often have additional form to complete so they know exactly which option is selected, and which account # to discount
- Applicants always must pay their non-discounted share
- Rules require it will be paid within 90 days of receiving service/equipment



Step 12: Requesting Reimbursement

- If applicant pays the vendor invoice in full, applicant submits Form 472 – BEAR Form to USAC for reimbursement
- Must have ‘full-rights’ permission to file BEAR in EPC
- Calculated based on eligible charges on actual bills

Deadline:

- October 28 (following close of funding year) for recurring services;
- January 28 for non-recurring services/equipment
- Can request 1 extension if the request is submitted by the original invoice deadline



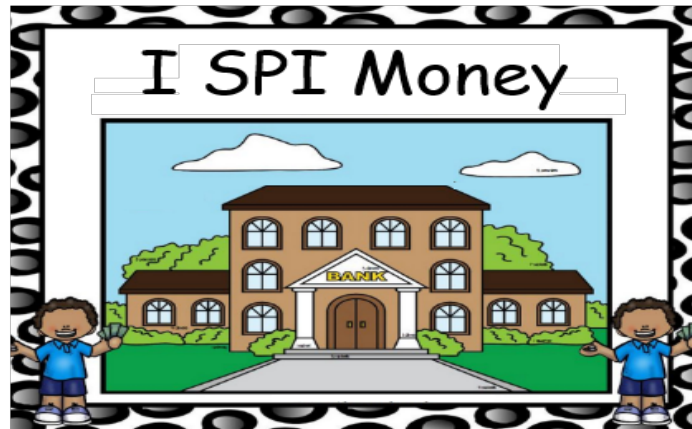
Reimbursement Method - BEAR

- USAC reviews/approves BEAR and sends payment to the applicant's bank account via EFT
- School/Library bank account info would have been submitted on Form 498
 - Only submitted once (update, if needed)
- To determine if you have an approved Form 498:
 - Log into EPC > Records > Form 498s > Click on 498 if one is showing
 - If no 498 is showing, then there isn't one on file with USAC



Discounted Bills Method - SPI

- Vendor applies E-Rate discounts to invoice(s)
- Vendor submits Form 474 SPI to USAC to seek reimbursement
- Applicants' responsibilities?
 - Notify the vendor you want discounted bills
 - Review invoices to ensure discounts are properly applied
 - File timely Form 486 so the vendor can invoice USAC



Record Retention



- Rules require all documents related to E-Rate rule compliance be kept for 10 years from last date to receive service (essentially 11 years)
- List of documents required to be kept:
 - <http://e-ratepa.org/wp-content/uploads/2014/03/Beneficiary-Initial-Request-List.xlsx>
 - RFPs, winning and losing bids, contracts, invoices, asset inventories, CIPA policies, etc.
- Asset Inventories - important
 - All audits require this to be submitted
 - Sample: <http://e-ratepa.org/wp-content/uploads/2014/03/Asset-Register-Sample.xlsx>

Let's Peek into EPC ...



Find Sign-In at: <https://www.usac.org/e-rate/>

After logging in and entering the one-time verification code, you'll see the One Portal Dashboard.

The image shows a composite of three screenshots from the USAC E-Rate website. The top-left screenshot shows the website's header with the USAC logo and navigation menu. The 'Sign In' button is highlighted with a red box, and a red arrow points to the login form on the right. The login form has fields for 'Username' and 'Password', a 'Forgot password?' link, and a disclaimer. The bottom-right screenshot shows the 'Dashboard' after login, with a blue header bar containing the USAC logo and a 'Sign Out' button. Below the header is a notification banner and three main sections: 'Upcoming Dates', 'Schools and Libraries', and 'Help?'. The 'Schools and Libraries' section contains two red-bordered boxes with text about the E-rate Productivity Center (EPC) and the Emergency Connectivity Fund (ECF). The 'Help?' section includes links for 'Send us a message' and 'Call us'.

E-Rate
Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet

EPC How-To Guide:
<http://e-ratepa.org/wp-content/uploads/2014/03/EP-C-Admin-How-To-Guide-2023.pdf>

Sign In

Universal Service Administrative Co.

Subscribe Payments Open Data **Sign In**

Username
Password
Forgot password?

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary

Sign Out

lorrie.germann@gmail.com

Dashboard

In accordance with the Supply Chain orders, new certifications have been added to the following forms: RHC - FCC Form 463 and the Telecom invoice, E-rate - FCC Form 473, and High Cost & Lifeline - FCC Form 481. Service providers are required to submit these annual certifications. For additional information, visit the [USAC Supply Chain page](#).

Upcoming Dates
No upcoming dates found.

Schools and Libraries

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.

Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form 474 (SPI) to request ECF reimbursement.

Help?
Send us a message [Click here](#)
Call us (888) 641-8722

EPC Entity Profile – Account Administrator

News Tasks (2) Records Reports Actions

My Applicant Landing Page

Training
Universal Service Administrative Co.

Welcome, Independent School 714!

Pending Inquiries

Type -- Select a Type --

Funding Year -- Select a Funding Year --

Application/Request -- Enter an Application/Request ID or Nickname --

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [IDD Extension](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | [Manage Users](#) | [Manage Organizations](#) | [EPC E-Rate Invoicing](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

APPLY FILTERS CLEAR FILTERS

If logging in as the Account Administrator (AA), you will see the option to **Manage Users**, as the AA is the one user who can add, remove, or change a user's rights. **If it's missing, you do not have admin rights.**

My Landing Page



Notifications

Notification Type:

Funding Year:

Notification	Description	Issued Date
--------------	-------------	-------------

My Entities

Entity	Entity Number	City	State	Zip Code
ABC Library System	17008809	Bellefontaine	OH	45811
ABC Main Library	17008809	Bellefontaine	OH	45811
South Branch	17008809	Bellefontaine	OH	45811
North Branch	17008809	Bellefontaine	OH	45811

Account Administrator
Name Jane Doe

General Contact
Name Jane Doe

Applicant Information
Library System Sub-Type Public Library System
 Private Library System

Category Two Budget Information
Sum of Square 22102
Footage of All Libraries in the System

Main Library Branch
County District Library - Main (Entity Number 17008809) Bellefontaine,OH

Billed Entity Detail Page

Click on the name of the Billed Entity (first in list) to see a summary of information, such as the name of the Account Admin and General Contact.

At the bottom of the page, the combined square footage of all branches is shown and used to calculate your Cat 2 budget.

Remember!! The square footage will also be used to determine your hotspot budget!!

Category 2 Budget Tool

1

Entity	Entity Number
ABC Library System	170
ABC Main Library	171
South Branch	172
North Branch	173

- Start my clicking on the Billed Entity under “My Entities”.

News Tasks (1) Records Reports Actions

Records Applicant Entities

321456 ABC Library System

Summary Customer Service Modifications Additional Information Discount Rates **Category Two Budget** Contracts FCC Forms FRN Appeals News Related Actions

Category Two Budget Status

Category Two Budget information presented below reflects data starting in FY2016.

GET CATEGORY 2 BUDGET INFORMATION

2

3

- Click on “Category 2 Budget” and then “Get Category 2 Budget Information”. You will see any requests since FY2021 and the Remaining Budget.

Category Two Budget Status

Category Two Budget information presented below reflects data starting in FY2016.

▼2021 - 2025

▼2021 - 2022 (Budgeted Entity)

>Show column definitions

Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Preliminary	\$482,914.00	\$0.00	\$19,504.96	\$19,504.96	\$463,409.04	View Details

4

Category Two Budget Details

Funding Year	Budget Status	Budget	Funding Year In-Review Requested Costs	Total In-Review Requested Costs	Funding Year Committed Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget
2021	Preliminary	\$482,914.00	\$0.00	-	\$19,504.96	-	-	-
2022			-	\$0.00	-	\$19,504.96	\$19,504.96	\$463,409.04

- Click on “View Details” to see the breakdown by funding year.

My Landing Page



Notifications

Notification Type

Funding Year

Notification	Description	Issued Date
--------------	-------------	-------------

My Entities

Entity	Entity Number	City	State	Zip Code
ABC Library System	170	Springfield	OH	45501
ABC Main Library	171	Springfield	OH	45501
South Branch	172			
North Branch	173			

Library Detail Page

Click on the name of each library, and then “Manage Organization”, to edit information pertaining to this building, such as square footage.

Note: You also have the option to provide information if there is an annex associated with this library.

Records / Applicant Entities

#17011069 - ABC LIBRARY SYSTEM - OHIO COUNTY - Main

[Manage Organization](#)

[Manage Annexes](#)

Organization Details

Name	Ohio County Library	Applicant Type	Library
Entity Number	17011069	Status	Active
FCC Registration Number			

Contact Information

Physical Address	407 S 4TH ST OH 43952-2942	Phone Number	740-282-9762
Mailing Address	407 S 4TH ST OH 43952-2942	Email	
		Website URL	

Modify An Organization - Library Detail View

Modify An Organization

Name *
NORTHWEST LIBRARY

Organization Type
Applicant

Physical Address

Address Line 1 *
2280 HARD RD

Address Line 2

City *
COLUMBUS

State *
OH

Zip Code *
43235

Zip Code Extension

Click the button below to get standard USPS address

County *
Please select a County

Please ensure that the address, city, state, and zip code are correct

[VERIFY MY ADDRESS](#)

Latitude / Longitude

User-entered Latitude

User-entered Longitude

Latitude

Longitude

[LOOKUP URBAN/RURAL STATUS](#)

Urban/Rural

User Entered Urban/Rural Status *

Rural

Urban

Urban/Rural Status

Rural

Urban

Unable to determine your status. Please enter Urban/Rural manually in User-Entered field.

Mailing Address

Mailing address is the same as physical address.

Address Line 1
2280 HARD RD

Address Line 2

City
COLUMBUS

State
OH

Zip Code
43235

Zip Code Extension

County

Other Methods of Contact

Phone Number *
614-645-2656

Ex. 000-000-0000

Phone Number Extension

Email

Website URL

View after clicking on “Manage Organization”

From here, you can correct building addresses.

Keep scrolling down (it’s a **really** long screen) to see the square footage field.

Modify An Organization - Main Library Detail View

Library Information

Library Sub-Type *

- Public Library
- Private Library

Check All That Apply

- Academic
- Research
- Tribal Library
- Bookmobile
- Kiosk
- New Construction Library
- Main Branch
- State Library Agency - Library

Is this library part of a library system?

Yes

Square Footage *

42446

You will need to provide your square footage in order to apply for any Category 2 funding.

Locale Code ⓘ

21

Enter or update Square Footage.

Verify Library information, and click on "Submit"

Associated School District

BEN	NAME	CITY	STATE	ZIP CODE
129000	Ohio Central School District	Any Town	OH	43085

If this library is no longer a main branch, please unselect the Main Branch Checkbox

Search for School Districts

BEN Search

Name Search

State Search

Zip Code Search

Please select a value

CLEAR FILTERS

SEARCH

FCC Registration Number ⓘ

CANCEL

SUBMIT

What's Next? Get Started Now!

- Administrative Window Updates (after 10/15)
 - Schools - Update enrollment/NSLP in EPC
 - Schools - Update C2 enrollment, if increase
- Review Category 1 contract
 - Need more bandwidth?
 - Contract expiring June 2025?
 - File FY 2025 Form 470s by early December
- Determine what equipment will be needed in the upcoming year for schools or libraries
 - File FY 2025 C2 Form 470s by Thanksgiving
 - PEPPM Option for Public Schools

Make and follow your FY 2025 E-Rate Plan!

Where to Go for E-Rate Help

- **USAC's Client Service Center (CSC)**
 - E-Rate “Help Desk” where applicants & service providers can get answers to questions
 - Call **888-203-8100**
 - Submit a ‘Customer Service Case’ in EPC
- **PA E-Rate Coordinator**
 - E-mail jtschell@comcast.net
 - Attend webinars!
 - Read listserve messages! https://e-ratepa.org/?page_id=7751
 - www.e-ratepa.org
 - **Helpful Documents:** http://e-ratepa.org/?page_id=754
 - **Training:** http://e-ratepa.org/?page_id=745





QUESTIONS