

# E-Rate Training for Non-Public Schools Beginners –

Funding Year 2025



# Agenda for Today

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- Overview
- Eligible entities
- E-Rate Productivity Center (EPC)
- Discount Calculations
- Eligible Services and Equipment
- Category 2 Budgets
- Application Process, step-by-step
- Copy of presentation available at: <https://e-ratepa.org/wp-content/uploads/2024/10/FY-2025-Beginners-Presentation-Non-Pub-Schools.pdf>

# What is E-Rate?

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- 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](http://www.E-ratepa.org)
  - Helpful Documents/Guides
- Have patience



# What Entities are Eligible in PA?

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- Public libraries eligible for LSTA funding
  - Includes bookmobiles
- Public and non-public, non-profit K-12 schools
  - Pre-k eligible (ages 3+)
  - Head Start (if operated by a public-school entity)
- Consortia comprised of eligible entities
- Non-Instructional Facilities (NIFs)
  - Admin buildings, bus barns, data centers, etc.
  - Only eligible for broadband/internet services (not equipment)
- Every “organization” has an E-Rate Billed Entity Number (BEN)
- Every “building” (school or NIF) must have an Entity Number
  - If a school has a secondary site (separate gym, vo/ag, etc.) that will receive E-Rate services, it is designated as an “Annex”. No separate entity number is needed.
  - Call USAC to obtain Entity Numbers for new buildings (school or NIF)



# EPC – E-Rate Productivity Center

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- 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
  - **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



# School Discount Calculations

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- **Discount level for schools based on 2 factors:**
  - % of students – district wide - who are eligible for National School Lunch Program (**NSLP**)
    - Doesn't matter if school serves lunch or participates in NSLP
    - CTCs use their own students' data, not sending schools' data
    - CEP schools' 1.6 multiplier calculated automatically
      - PDE data will contain raw CEP data to use
    - Alternatives to using NSLP data available
  - Whether a **majority** of schools buildings are considered **rural**
    - Designations already in EPC
    - Being updated next week for 2020 US Census rural/urban designations
- Using this data, 'Discount Matrix' is then used to determine discounts



# School District Example

School	Urban/Rural	Enrollment	NSLP	
DALLASTOWN EL SCH	R	185	83	
LOGANVILLE-SPRINGFIELD EL SCH	R	434	77	
YORK TWP EL SCH	R	463	176	
ORE VALLEY EL SCH	U	554	191	
DALLASTOWN AREA SHS	U	1715	366	
LEADERS HEIGHTS EL SCH	U	164	33	
DALLASTOWN AREA MS	U	1003	282	
Administration Office	n/a	1380	408	
<b>DALLASTOWN AREA SCHOOL DISTRICT</b>	<b>U</b>	<b>4518</b>	<b>1208</b>	<b>26.7%</b>

**% NSLP = 27%**

**Not a majority of schools are Rural**

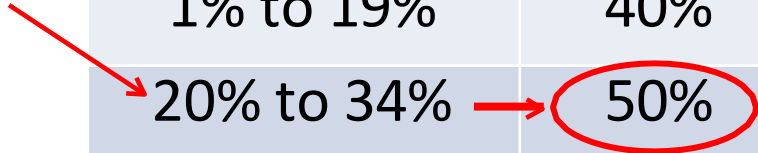
# Discount Matrix

## 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

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

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

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

# How Does USAC Obtain Enrollment & NSLP Data?

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- Short answer: Each school is required to update their EPC profiles annually during an “Admin Window”
  - System automatically calculates discounts
    - Discount Data is then be ported into E-Rate application from EPC
  - Update C2 enrollment during Admin Window, if increases
  - For Funding Year 2025, Admin Window is open October 15 – early Jan
  - Julie will send PDE enrollment/NSLP data to listserve in mid December
  - Wait and update profiles after PDE data release
- Libraries do not enter enrollment/NSLP data
  - EPC linked to school district in which the library (or main library in a system) is located
  - Libraries only update changes to square footage for each building, if any
    - Square footage is used to determine Category 2 budgets



# 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 school or 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

## Not Eligible:

- Voice services
- Duplicative (redundant) services
- Filtering

## 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

• Wi-Fi on Buses

• Off-Premise Hotspots...New for FY2025



# CABIO Internet Bidding Exemption

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## 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

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- 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)

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- 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

# Mixed Functionality

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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

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- 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

# Equipment Transfer/Disposal Rules

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- **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

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- 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

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- 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

SCHOOLS		Enter data in yellow cells							
A	B	C	D	E	F	G	H		
<b>FY 2025 C2 Student Enrollment</b>	<b>School Multiplier</b>	<b>FY 2025 E-rate C1 Discount</b>	<b>(a*b*c)</b>	<b>Rounded up to Nearest 10</b>	<b>3-year multiplier - \$630</b>	<b>Hotspot 3-Year Pre-Discount Budget (\$630 * E)</b>	<b>Most Pre-Discount You Can Request in Any Year - 45% of 3 Year Budget</b>		
1010	20%	90%	182	190	\$630	\$119,700	\$53,865	<i>Example A</i>	
14550	20%	40%	1164	1,170	\$630	\$737,100	\$331,695	<i>Example B</i>	
	20%		0	0	\$630	\$0	\$0		

# Category 2 Budget Calculations



# Category 2, 5-Year Funding Caps

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- 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

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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

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- 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

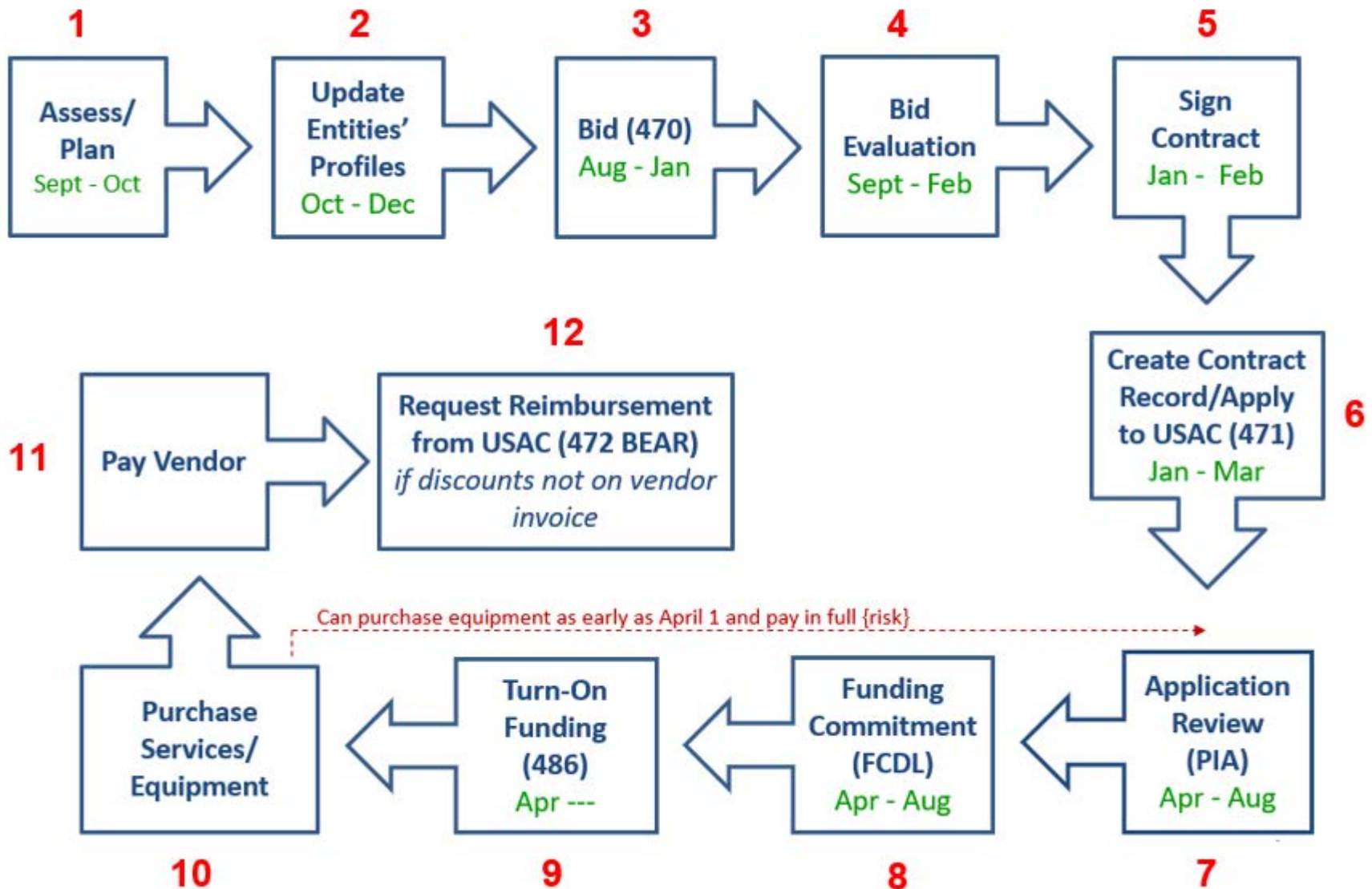
E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - November
2) Update EPC Profiles - Admin Window	Oct - early January
3) Bid All New Services/Equipment – Form 470	Now - December
4) Bid Evaluation	January/February
5) Board Approval/Sign Contracts	January/February
6) Request E-Rate 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 <b>or</b> – 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 1<sup>st</sup> 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																														
		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		
Form	Description	2024	2024	2024	2024	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	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

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- **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

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## 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?

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## 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

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- 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)

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- 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

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**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](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](https://e-ratepa.org/?page_id=745)

# During the Bidding Period...

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- 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

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- 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
<b>TOTAL POINTS</b>		<b>88</b>	76	80





# Step 5: Signing Contracts

---

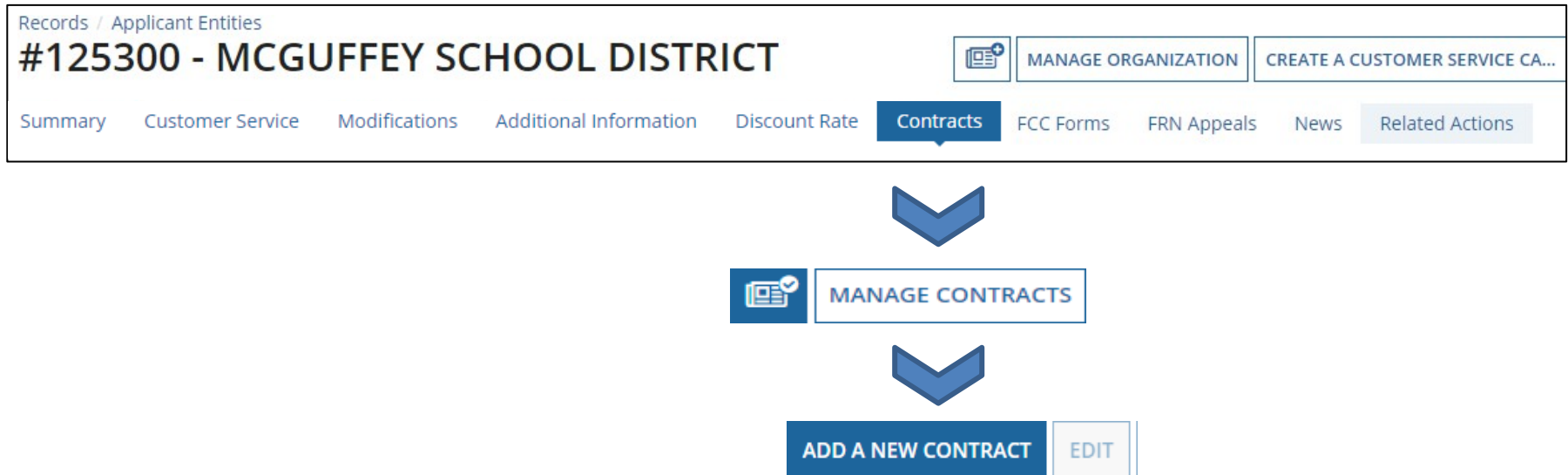
- Contracts (which include hardware quotes) must be signed/dated by the **applicant** before you submit Form 471
  - Unless receiving services on a month-to-month basis
  - Vendor can sign after the Form 471 deadline
  - Obtain board approval, if required, before signing a vendor contract



# 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



# Purpose of Contracts Module

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- 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

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## 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

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## 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

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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

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- 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

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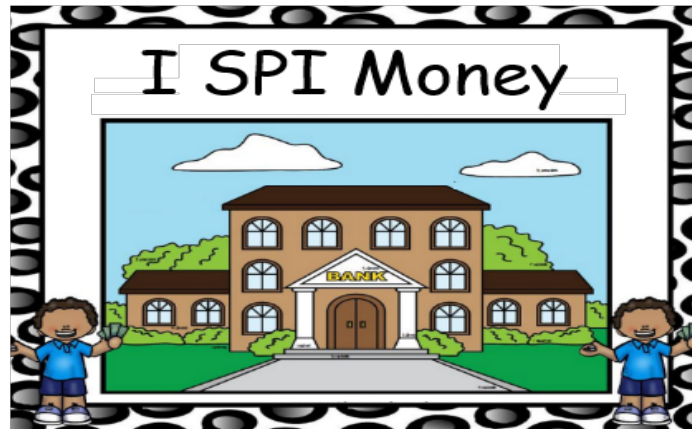
- USAC reviews/approves BEAR and sends payment to the applicant's bank account via EFT
- School/Library bank account info would have been submitted on Form 498
  - Only submitted once (update, if needed)
- To determine if you have an approved Form 498:
  - Log into EPC > Records > Form 498s > Click on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



# Discounted Bills Method - SPI

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- 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

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- 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 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 in the middle screenshot. The middle screenshot shows the login form with fields for 'Username' and 'Password', and a 'Forgot password?' link. Below the form is a disclaimer. The bottom screenshot shows the 'Dashboard' after login, with a blue header bar containing the USAC logo and a 'Sign Out' button. The dashboard content includes a notification banner, an 'Upcoming Dates' section, and two sections for 'Schools and Libraries' and 'Emergency Connectivity Fund (ECF)'. The 'Schools and Libraries' section contains text about the E-rate Productivity Center (EPC), and the 'ECF' section contains text about the Emergency Connectivity Fund portal. Both sections are highlighted with red boxes. A red arrow also points from the 'Sign Out' button in the middle screenshot to the 'Sign Out' button in the bottom screenshot.

**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>

**Dashboard**  
lorrie.germann@gmail.com

**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 Applicant Landing Page



Training

Universal Service  
Administrative Co.

[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](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Welcome, [School District 10997!](#)

### Pending Inquiries

Type

Application/Request

Funding Year

### Notifications

[APPLY FILTERS](#) [CLEAR FILTERS](#)

Notification Type

Status  All

Generated

Not Generated

Funding Year

Notification	Description	Issued Date	Generated By	Generated On
No items available				

### My Entities

Entity	Entity Number	City	State	Zip Code
School District 10997	10426	Rockville	MD	20850
School 2 In District 10997	6911	Rockville	MD	20850
School 3 In District 10997	6912	Rockville	MD	20850

Clicking on the district's (Billed Entity) name will take you to the district's "Organization Detail" summary page.

# Category 2 Budget Tool

1

### My Entities

Entity	Entity Number	City
School District 10997	10426	Rockville
School 2 In District 10997	6911	Rockville
School 3 In District 10997	6912	Rockville

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

News Tasks (1) Records Reports Actions

Records / Applicant Entities

### # 321456 ABC CITY SCHOOLS

Summary Customer Service Modifications Additional Information Discount Rate **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	<b>View Details</b>

#### 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

4

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

# School Detail Page

## My Landing Page



Training

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 470 Change](#) | [Service Substitution](#) | [Manage Us](#) | [Help](#)

Welcome, [School District 18!](#)

### Notifications

Notification Type:

Funding Year:

Status:  All  
 Generated  
 Not Generated

Notification	Description	Issued Date	Generated By
No items available			

### My Entities

Entity	Entity Number	City
School District 18	170	Springfield
School District 18 NIF	171	Springfield
School District 18 School A	172	Springfield

Click on the name of each school, and then "Manage Organization", to edit information pertaining to this building, such as Student or NSLP Counts.

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

Records / Applicant Entities

## #6913 - School 1 In District 10997

[MANAGE ORGANIZATION](#) [MANAGE ANNEXES](#)

**Summary** | Modifications | Additional Information | Category Two Budget | Contracts | FCC Forms | News | Related Actions

### Organization Details

<b>Name</b>	School 1 In District 10997	<b>Applicant Type</b>	School
<b>Entity Number</b>	6913	<b>Status</b>	Active
<b>FCC Registration Number</b>	0123456789		

### Contact Information

<b>Physical Address</b>	1 Main Street Rockville, MD 20850 Montgomery County	<b>Phone Number</b>	012-345-6789
		<b>Email</b>	school_1_dist_10997@testmail.usac.org

# Modify An Organization - School Detail View

## Modify An Organization

**Name \***  
School 2 In District 10997

**Organization Type**  
Applicant

### Physical Address

**Address Line 1 \***  
1 Main Street

**Address Line 2**

**City \***  
Rockville

**State \***  
OH

**Zip Code \***  
20850

**Zip Code Extension**

Click the button below to get standard USPS address

**County \***  
Montgomery 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.

View after clicking on “Manage Organization.” Here, you can correct the building address if needed. You will also update enrollment and NSLP counts per school.

**Just keep scrolling down; it’s a really long screen!**

# Modify An Organization - School Detail View

## School Information

**School Sub-Type \***

- Public School
- Private School

Check All That Apply [Show Help](#)

- Pre-K
- Head Start
- Adult Education
- Juvenile Justice
- Dormitory
- Charter School
- Tribal School
- New Construction School
- Swing Space
- Detention Center
- General-Use School
- ESA School
- BIE

**Is this school part of a school district?**

Yes

**Number of Full Time Students \***

374

**Total Number of Students Eligible for National School Lunch Program (NSLP) ⓘ \***

278

**Community Eligibility Program (CEP)? \***

- Yes
- No

**Alternative Discount Method \***

None

Indicate if an alternative discount mechanism was used to calculate the number of students eligible for NSLP

**Does this organization have an endowment? \***

- Yes
- No

**State School Code**

**State LEA Code**

**NCES Public State Code**

**NCES Public District Code**

**NCES Public Building Code**

- Check boxes to further indicate the type of school if needed.
- Update/correct **Student** and **NSLP** counts.
- **If you are a school with only part-time students, count them as if they were full-time**
- In this example, the school is not participating in CEP, so “No” is indicated.

# Modify An Organization - CEP and CAT 2 Budget Info

<b>Number of Full Time Students *</b> 531	<b>Total Number of Students Eligible for National School Lunch Program (NSLP) ⓘ *</b> 507
<b>Community Eligibility Program (CEP)? *</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	<b>CEP Percentage *</b> 59.57%
	<b>CEP Base Year *</b> 2023



- If participating in CEP, do not enter the NSLP count, the portal will calculate that for you.
- Select “Yes” for CEP and enter the “CEP Percentage”, which will replace the “Alternative Discount Method” field. The percentage can be found in the MR-81 or CN-7 report.
  - If you used CEP last year, that information will be shown. Update if you needed.
- **We must provide the CEP Base Year.** If this has changed, be sure to update.

## Category Two (C2) Budget Information

We calculate your Category Two budget and your discount rate separately, and so we collect separate numbers for each. You are allowed to re-use your Category Two student count from year to year within a Category Two budget cycle, so this number needs to be updated less frequently than the student count for your discount rate.

**Total Students for C2 Budget \***

499

**FCC Registration Number ⓘ**

0123456789

CANCEL

SUBMIT

- **Update the Cat 2 Budget Information ONLY if your enrollment increased!!**



# What's Next? Get Started Now!

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- 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

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- **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](mailto:jtschell@comcast.net)
  - Attend webinars!
  - Read listserve messages! [https://e-ratepa.org/?page\\_id=7751](https://e-ratepa.org/?page_id=7751)
  - [www.e-ratepa.org](http://www.e-ratepa.org)
    - **Helpful Documents:** [http://e-ratepa.org/?page\\_id=754](http://e-ratepa.org/?page_id=754)
    - **Training:** [http://e-ratepa.org/?page\\_id=745](http://e-ratepa.org/?page_id=745)





**QUESTIONS**