

E-Rate Training for Non-Public Schools - Beginners

Funding Year 2026



Presented by Lorrie Germann
On behalf of the Pennsylvania Department of Education
Fall 2025

Agenda for Today

- E-Rate Overview – Slide 3
- Discount Calculations – Slide 7
- Eligible Services and Equipment – Slide 13
- Program Updates (What's New For FY2026) – Slide 26
- Application Process – Slide 33
- E-Rate Productivity Center (EPC) – Slide 65



What is E-Rate?

- FY2025 Program Cap was \$5.06B
 - Funding does not come from the federal budget but is part of the Universal Service Fund (USF), which exists to ensure that all people in the United States have access to quality, affordable connectivity service
- Provides 20-90% discounts on eligible services and equipment
- Program principles:
 - All equipment and services (**with a couple of exceptions**) must be competitively bid using the E-Rate portal for at least 28 days
 - Applicants **MUST** pay their non-discounted share (cannot be waived)
 - For example, if your discount is 80%, you must pay 20%
- FCC sets all rules and policies
 - USAC (Universal Service Administrative Co.), an independent, not-for-profit organization designated by the FCC to manage the program/ application process
 - We typically start applying 6-12 months before the funding year begins
 - The program is highly deadline-driven

Funding Year

A Funding Year (FY) starts on July 1 and ends the following June 30.

- **Our current funding year, FY2025, started on July 1, 2025, and ends on June 30, 2026.**
- **We are preparing to file for FY2026, which starts on July 1, 2026, and ends on June 30, 2027.**

Delivery and installation of services

- **Recurring services** (e.g., monthly internet access) must be delivered during the funding year.
- **Non-recurring services** (e.g., equipment) can generally be installed **as early as April 1 (90 days) before the July 1st start of the funding year** through September 30 following the close of the funding year.
 - The September 30 deadline can sometimes be extended, either automatically or by request.

How to Be E-Rate Successful

- Read (and distribute) listserv messages
 - Are you on the PA E-Rate listserv? (e-mail Lorrie, 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
- 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, trailer, 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)



Discount Calculations



School Discount Calculations

- **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
- 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	
DALLASTOWN AREA SCHOOL DISTRICT	U	4518	1208	26.7%

% NSLP = 27%

Not a majority of schools are Rural

Discount Matrix

Income % of students in the school that qualify for the NSLP...	Category 1		Category 2	
	Category 1 Urban Discount	Category 1 Rural Discount	Category 2 Urban Discount	Category 2 Rural Discount
Less than 1%	20%	25%	20%	25%
1% to 19%	40%	50%	40%	50%
20% to 34%	50%	60%	50%	60%
35% to 49%	60%	70%	60%	70%
50% to 74%	80%	80%	80%	80%
75% to 100%	90%	90%	85%	85%

If NSLP% = 27% with a majority of Urban schools

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

How Does USAC Obtain Enrollment & NSLP Data?

- Short answer: Each school is required to update their EPC profiles annually during an “Admin Window”
 - System automatically calculates discounts
 - Discount Data is then ported into the E-Rate application from EPC
 - Update C2 enrollment during Admin Window, if increases
 - For Funding Year 2026, Admin Window is open October 15 – early Jan
 - Lorrie will send PDE enrollment/NSLP data to listserve in mid-December
 - Wait and update profiles after PDE data release



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, including NIFs, 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

Also Eligible (less common):

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

Not Eligible:

- Voice services
- Duplicative (redundant) services
- Filtering

Off-Premises Wi-Fi Hotspots and Bus Wi-Fi Are No Longer E-Rate Eligible

- On Sept. 30, 2025, the FCC overturned the previously adopted Report and Order (FCC 24-76), which made **Wi-Fi hotspots and Bus Wi-Fi for off-premises use** eligible for E-Rate program support
- The Commission clarified that providing Wi-Fi or similar technologies outside of traditional school and library premises does not fall within the scope of the E-Rate program
- Based on this decision, the FCC has released an amended FY2025 Eligible Services List, removing Wi-Fi services for school buses and hotspots as eligible services
- The service will be ineligible for FY2026 as well

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, before the funding year start
 - For example, applicants can purchase equipment on April 1, 2026, for FY 2026, even though the funding year doesn't begin until July 1, 2026
 - **However**... vendors/applicants cannot be reimbursed from USAC until July 1
 - Applicants who purchase equipment before receiving a funding commitment letter risk paying full price
- Equipment can be purchased as late as September 30, following the end of the funding year
- Allows applicants two full summers to install equipment

FY2026 - Non-Recurring Services/Equipment Purchases - April 1, 2026 - Sept 30, 2027																	
FY2026 - Recurring Service - July 1, 2026 - June 30, 2027																	
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2026	2026	2026	2026	2026	2026	2026	2026	2026	2027	2027	2027	2027	2027	2027	2027	2027	2027

Basic Maintenance (BMIC)

- Basic Maintenance of Internal Connections is the **repair and upkeep of eligible internal connections, which include:**
 - **In-Person Services**, which include on-site repairs (Time and Material Contracts).
 - If repair or replacement work is performed under a maintenance contract, USAC only reimburses for the **actual work performed**.
 - Next Business Day equipment replacement is not eligible
- Multi-year, pre-paid contracts must be amortized
 - Cannot apply for the full cost of the 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 (7/1/2026 – 6/30/2027)
 - Does **not** follow the 4/1/2026 – 9/30/2027 schedule

Draft FY2026 ESL

- The FCC proposes to include software-based services, including bug fixes, security patches, software-based technical assistance, and configuration changes under **Internal Connections!!**
- **Fixed maintenance contracts** (on-site configuration changes, and time and materials) will continue to be eligible for funding under BMIC, but only for the work that is actually performed under the contract

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

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 FY2026?

Category 2 Budget Calculations



New 5-Year Category Two (C2) Budget Cycle

FY 2026 will be the first year of the FY 2026-2030 funding cycle.

- Unused funds from the FY 2021 – 2025 Category Two (C2) budget were not rolled over to the FY 2026 – 2030 funding cycle
- The [E-Rate C2 Budget Tool FY2021+](#) has been updated to provide-C2 budget forecast data for the FY 2026-2030 C2 budget cycle
- Applicants will be required to validate their student counts or library square footage in the first year they apply for C2 support during the FY2026-2030 cycle
- The C2 budget is calculated at the [school district level](#) based on the combined student enrollment

FY2026-2030 C2 Budget Cycle Updates

FY 2026-2030 C2 Budget Cycle

Schools

- \$201.57/student
- \$30,175.00 funding floor
 - This means a school with fewer than 150 students ($\$201.57/\text{student} * 149 \text{ students} = \$30,033.93$) receives the funding floor of \$30,175.

Libraries

- \$5.43/square foot
- \$30,175 funding floor
 - This means a library **with less than 5,558 square feet** ($\$5.43/\text{square foot} * 5,557 \text{ square feet} = \$30,174.51$) receives the funding floor of \$30,175.

Calculating Remaining C2 Budgets – Using USAC’s Open Data

What is your Category 2 Budget for this C2 cycle?

1) Go to: [E-Rate C2 Budget Tool FY2021+](#)

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

3) Summary Table will appear

▼ Filters (2) ✕

[Clear All](#)

State

Applicant Type

City

Billed Entity Name

BEN

Consulting Firm Name (CRN)

Review these columns:

C2 enrollment currently in EPC

5-Year Pre-Discount C2 Budget

“Funded” amount from FY2026-FY 2030

Amount “pending” FY2026-2030

Remaining available C2 Budget

Full T... :	Librar... :	Scho... :	Librar... :	C2 Bu... :	C2 Bu... :	Fund... :	Pendi... :	Avail... :
1,950		\$201.57		\$393,061....	Forecast	\$0.00	\$0.00	\$393,061....
8,752		\$201.57		\$1,764,14...	Forecast	\$0.00	\$0.00	\$1,764,14...

Establishing Your C2 Budget for this Cycle

- Update your entity profile in EPC during the Administrative Window
- **Forecast Budget:** Beginning in the FY2026- 2030 budget cycle, all entities will have a Forecast budget status based on the information in their EPC profile. This means that any updates you make to the entity profile will automatically reflect in an updated budget amount, without the need to request a replacement budget
- **Preliminary Budget:** The entity has **certified** a Form 471 application within the FY2026-2030 C2 budget cycle. This means that the entity has certified the accuracy of the budget data currently in the entity profile
- **Confirmed Budget:** Once Program Integrity Assurance (PIA) review of FY2026-2030 C2 Form 471 application is **complete**. The C2 budget in the entity profile is now **fixed**. It can only be changed via an Appeal for the current FY. Beginning in FY2027, the entity can request a replacement C2 budget if the student count has increased for the next year

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

Data Used for Category 2 Budgets

- Enrollment data entered in a separate location in EPC (different from discount calculations)
- Why? Enrollments are set at the first year you apply for C2 during that Category 2 Budget Cycle
- Not required to update after the first year you apply for C2
- 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



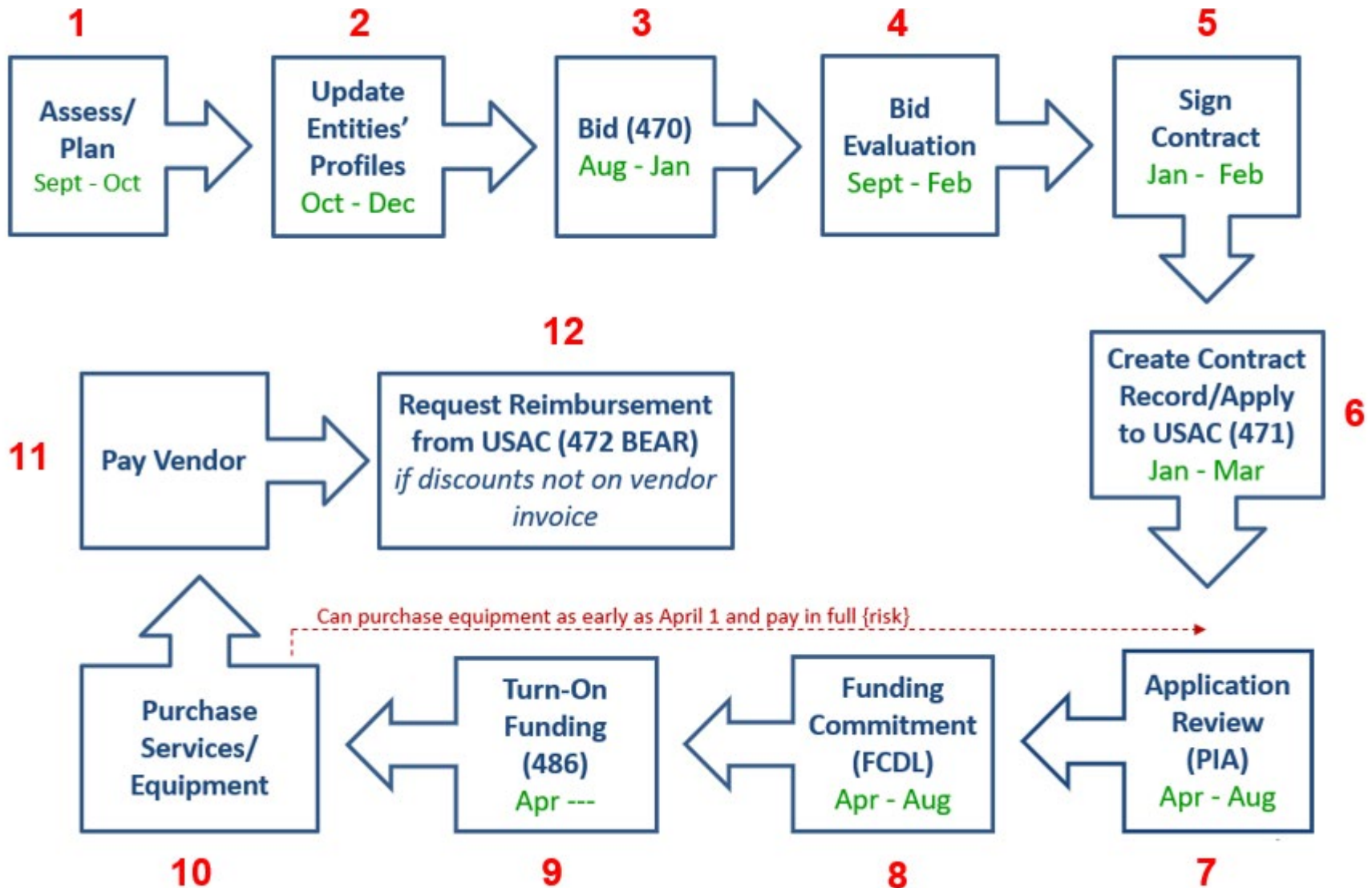
The Application Process



Application Process Overview

E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - December
2) Update EPC Profiles - Admin Window	Oct 15, 2025- early January
3) Bid All New Services/Equipment – Form 470	Now - January
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, 2026 – June 30, 2027
11) Pay Vendor	July 1, 2026 – June 30, 2027
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, 2027 (deadline)

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 document will be posted soon
 - Extend, if options are available
 - Must send documentation to the vendor of the request to extend
 - If the contract is expiring, decide if upgraded services are needed
- **Category 2:** Determine what equipment/wiring is needed for each building for the 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
 - **Admin window opens on Oct. 15th, and will close early Jan.**
 - And update Category 2 Enrollment if it has increased
 - Data cannot be changed in EPC 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 disqualifying 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, 2027, you are **not** required to file a Form 470 for FY 2026

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, 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, 2026; therefore...
- February 25, 2026 = 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 the 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
 - Exception: If you're receiving services on a month-to-month basis
 - Obtain board approval, if required, before signing a vendor contract
 - Vendor can sign contract after the Form 471 deadline



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 system interface for the record #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' tab is selected. A large blue downward arrow points to a 'MANAGE CONTRACTS' button with a document icon. Another large blue downward arrow points to a row of two buttons: 'ADD A NEW CONTRACT' and 'EDIT'.

- We'll walk through this step by step during Form 471 training!

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...

- 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)

FY2026 - Non-Recurring Services/Equipment Purchases - April 1, 2026 - Sept 30, 2027																	
			FY2026 - Recurring Service - July 1, 2026 - June 30, 2027														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2026	2026	2026	2026	2026	2026	2026	2026	2026	2027	2027	2027	2027	2027	2027	2027	2027	2027

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



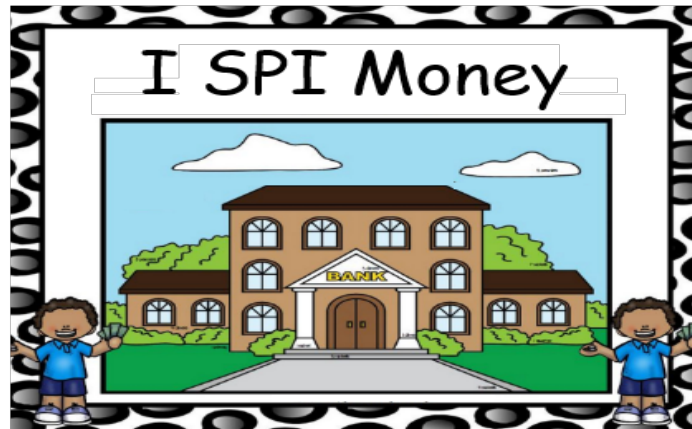
Reimbursement Method - BEAR

- 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



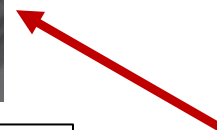
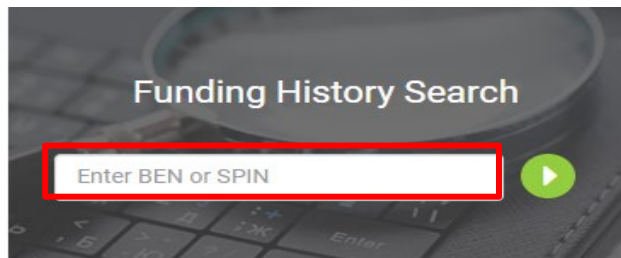
Record Retention



- 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>

Quick Way to Your Funding Information

Go to: www.E-Ratecentral.com



E-Rate Utilization Summary Chart

FY: [1998](#) | [1999](#) | [2000](#) | [2001](#) | [2002](#) | [2003](#) | [2004](#) | [2005](#) | [2006](#) | [2007](#) | [2008](#) | [2009](#) | [2010](#) | [2011](#) | [2012](#) | [2013](#) | [2014](#) | [2015](#) | [2016](#) | [2017](#) | [2018](#) | [2019](#) | [2020](#) | [2021](#) | [2022](#) | [2023](#) | [2024](#) | [2025](#) | [All](#)

FY	Requested FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2	Total Committed	Total Disbursed	Remaining Balance
2025	1	1	1	\$13,650.62	\$13,650.62	\$0.00	\$13,650.62	\$0.00	\$13,650.62
2024	3	3	3	\$25,255.52	\$11,375.52	\$8,350.00	\$19,725.52	\$19,234.27	\$491.25
2023	3	3	3	\$37,408.02	\$11,375.52	\$26,032.50	\$37,408.02	\$37,408.02	\$0.00

1. Enter your Billed Entity Number.
2. Click on Funding Year
3. See your 471, FRN, and SPIN information.
4. Click on the FRN number to see full detail

471	FRN	SPIN	Service Provider	Service*	Original Request	Current Commitment
251021015	2599026407	143001654	Western Ohio Computer Commission			

471 Information

471#:	251016864	
SPIN:	143001654	ABC Local Telecom Company
Service Type:	Data Transmission and/or Internet Access	
Status:	Funded	Wave: 1
Status Memo:	• MR1:Approved as submitted.	
Service Start Date (471):	7/1/2025	FCDL Date: 4/26/2025
Current Commitment:	\$25,423.20	Service Start Date (486): 7/1/2025
Disbursed Amount:*		Payment Mode: NOT SET
Last Date of Service:		Undisbursed: 25423.20
		Last Date to Invoice: 10/28/2026

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 from it 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. A red arrow points from the 'Forgot password?' link to the 'Sign Out' button in the bottom screenshot. The bottom screenshot shows the 'Dashboard' page with a blue header, a user profile, and several sections: 'Upcoming Dates', 'Schools and Libraries', and 'Help?'. The 'Schools and Libraries' section contains two red-bordered boxes: one for the 'E-rate Productivity Center (EPC)' and one for 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

Click here for the [EPC How-To Guide](#)

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

Universal Service Administrative Co. 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

Portal Access – Add Text MFA Option

The screenshot shows the Universal Service Administrative Co. portal dashboard. At the top left is the logo and name. At the top right is a 'Sign Out' button. The main content area includes a 'Dashboard' header, 'Upcoming Dates' (with a calendar icon), 'Schools and Libraries' (with an upward arrow), and a 'Help?' section with links for 'Send us a message' and 'Call us'. A user profile dropdown is visible, showing the email 'lorrie.germann@gmail.com' and a 'Settings' option. A red box highlights the 'Settings' option, and a red arrow points from it to the 'Extra Verification' dialog box. The dialog box has a title bar with a checkmark and the text 'Extra Verification'. Below the title bar, it says 'Extra verification increases your account security when signing in to Okta and other applications you use.' At the bottom of the dialog, there is a 'Text Message Code' label and a 'Setup' button with a wrench icon.

After initially logging in, but before clicking on “EPC”, click on the pull-down to the right of your username to see “Settings”. Scroll down to see “Extra Verification” and click on “Setup”. Provide your phone number and enter the code you’ll receive on your phone, then “Verify”, and “Done”.

Category 2 Budget Tool

1

Entity	Entity Number
Independent School 714	24752

Click on the name of your school under “My Entities” to see a summary of information, such as the name of the Account Admin and General Contact.

Records / Applicant Entities

#24752 - Independent School 714

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

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

Organization Details

Name	Independent School 714	Applicant Type	School
Entity Number	24752	Status	Active
FCC Registration Number	2234567890		

Contact Information

Physical Address	1112 East Ave Queens, VA 16017	Phone Number	111-111-1112
Mailing Address	1112 East Ave Queens, VA 16017	Email	
		Website URL	

Account Administrator

Name Independent School 1 Admin 714

General Contact

A General Contact has not been indicated.

**You will see the summary information about your school -
Scroll down to see the Category Two Budget Info**

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	937
Budget	

At the bottom of the page, you will see the past enrollment for your Cat 2 budget.

Category 2 Budget Tool

News Tasks (1) Records Reports Actions

Records / Applicant Entities
#24752 - Independent School 714

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

Click on “Category 2 Budget” and then “Get Category 2 Budget Information”.

Category Two Budget Status

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

2026 - 2030

2026 (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	
Forecast	\$288,446.67	\$0.00	\$0.00	\$0.00	\$288,446.67	View Details

2021 - 2025

2021 - 2025 (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	\$92,500.00	\$93,496.00	\$0.00	\$93,496.00	\$0.00	View Details

The new budget “forecast” is listed based on the total square footage reported. Clicking on “View Details” will show the funding breakdown by funding year.

School Detail Page

My Applicant Landing Page

Training
Universal Service
Administrative Co.

Welcome, Independent School 714!

Notifications

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
Independent School 714	24752	Queens	VA	16017

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

Note: if you don’t see a menu option for “Manage Organization”, click on the pull-down.

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

Records / Applicant Entities

#24752 - Independent School 714

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

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

Organization Details

Name	Independent School 714	Applicant Type	School
Entity Number	24752	Status	Active
FCC Registration Number	2234567890		

Modify An Organization - School Detail View

Modify An Organization

Name *

Organization Type
Applicant

Physical Address

Address Line 1 *

Address Line 2

City *

State *

Zip Code *

Zip Code Extension

Click the button below to get standard USPS address

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

Is this school part of a school district?

No

Check All That Apply [Show Help](#)

- | | |
|---|--|
| <input type="checkbox"/> Pre-K | <input type="checkbox"/> New Construction School |
| <input type="checkbox"/> Head Start | <input type="checkbox"/> Swing Space |
| <input type="checkbox"/> Adult Education | <input type="checkbox"/> Detention Center |
| <input type="checkbox"/> Juvenile Justice | <input type="checkbox"/> General-Use School |
| <input type="checkbox"/> Dormitory | <input type="checkbox"/> ESA School |
| <input type="checkbox"/> Charter School | <input type="checkbox"/> BIE |
| <input type="checkbox"/> Tribal School | |

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.
- In this example, the school is not participating in CEP, so “No” is indicated.

Modify An Organization - School Detail View w. CEP

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

Number of Full Time Students*

531

Community Eligibility Program (CEP)?*

Yes

No

Is this school part of a school district?

No

New Construction School

Swing Space

Detention Center

General-Use School

ESA School

BIE

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

507

CEP Percentage*

59.57%

CEP Base Year*

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.
 - If you used CEP last year, that information will be shown. Update if needed.
- **We must provide the CEP Base Year.** If this has changed, be sure to update.

Modify An Organization - School Cat 2 Enrollment

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 *

FCC Registration Number ⓘ

- The Cat 2 budget and the discount rate are calculated separately. **You must update the enrollment to start the new 5-year budget cycle.** You can keep the same Cat 2 moving forward through the new budget cycle, but if your enrollment increases later in the cycle, you can update it. **If this is “New Construction” or “Swing Space”, the count will be “zero”**
- Click on “Submit” and provide a nickname for the changes made (such as “ABC School FY2026 counts”).

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 2026?
 - File FY 2026 Form 470s by early December
- Determine what Cat 2 equipment will be needed in the upcoming year for schools or libraries
 - File FY 2026 C2 Form 470s by Thanksgiving

Make and follow your FY 2026 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 lgermann@e-ratepa.org
 - 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

