

# E-Rate Training Workshop for Veteran PA Applicants



Presented by Lorrie Germann  
PA E-Rate Coordinator  
for the Pennsylvania Department of Education  
October 2025  
[www.E-Ratepa.org](http://www.E-Ratepa.org)

# Agenda for Today

- **Completing FY2024** – Slide 3
- **Where Are You At For FY2025** – Slide 9
- **Preparing For FY2026** – Slide 16
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  - E-Rate Simplifications & Reminders – Slide 27
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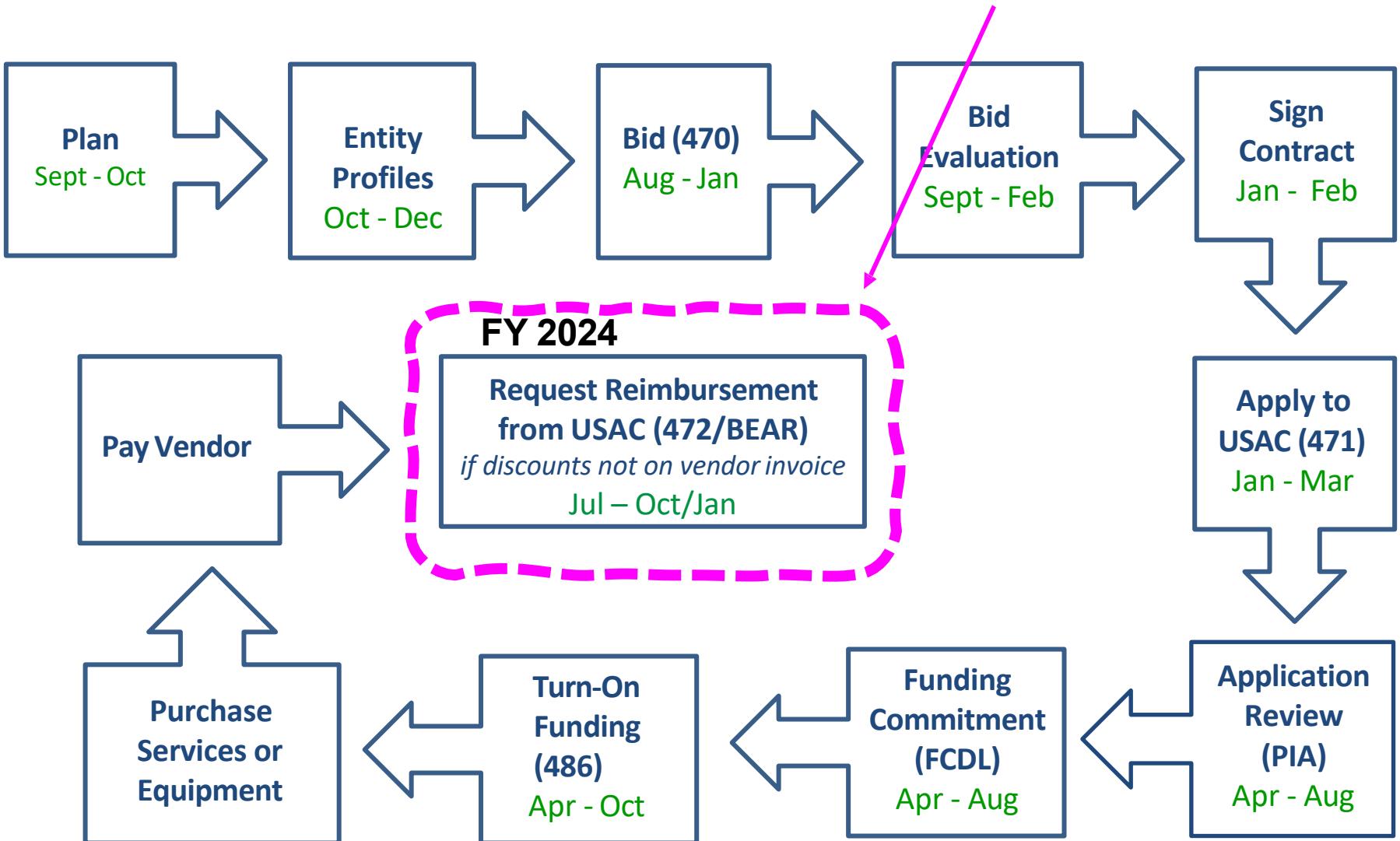
# *Completing FY 2024*

*(July 1, 2024 – June 30, 2025)*



# The E-Rate Cycle

For FY 2024, we are here



# BEAR Reimbursement Deadlines

- BEAR Form 472 – Form that must be submitted within 120 days of last date to receive service or equipment
- **For FY 2024 *recurring* services**
  - **October 28, 2025** is the invoicing deadline
    - Last date to receive service was June 30, 2025
- **For FY 2024 *non-recurring* purchases**
  - September 30, 2025 was last date to receive/install equipment
  - Jan 28, 2026 is BEAR deadline



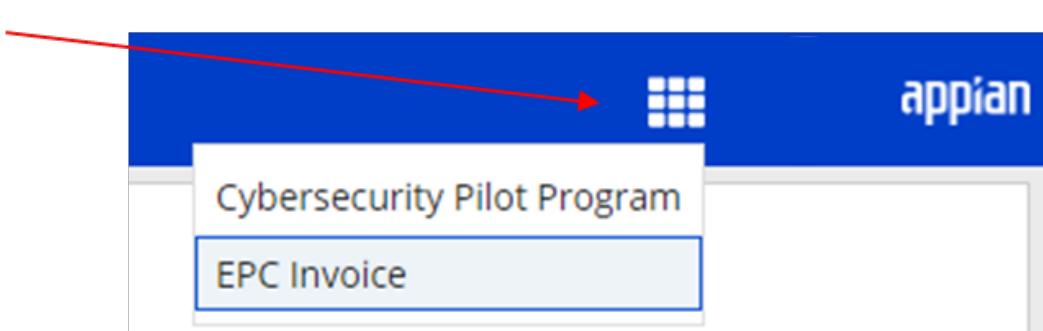
## Requesting an Invoice Deadline Extension

- If you cannot make the BEAR deadline, **OR** if your BEAR was submitted but has not yet been paid, **file for an Invoice Deadline Extension (IDER)**
- IDERs must be requested by the invoice deadline (Oct. 28)
- Extension will be approved automatically for a single, 120-day extension
  - Cannot request a second extension in EPC
  - Approvals are shown on the screen and will also be emailed
- Invoice Deadline Extension Request Filing Guide at: <https://eratepa.org/wp-content/uploads/2024/10/Guide-to-Requesting-Invoice-Deadline-Extension.pdf>

**TIP!**

# BEAR – EPC Invoicing

- E-Rate BEAR functionality is in EPC
- Log into EPC, and click on the grid (waffle) symbol in the upper right corner of the Landing Page, which will take you to the new E-Rate BEAR Portal



- For a BEAR Filing Guide, visit: <https://e-ratepa.org/wp-content/uploads/2025/07/Form-472-BEAR-Filing-Guide.pdf>
- Must have BEAR access under User Permissions to submit BEAR
  - Only EPC AA can grant this access
  - When creating BEAR, you are not required to upload invoices. Wait for USAC to request them.

# BEAR Portal Reminders

## Improvements:

- Error checks (entering a higher pre-discount amount than what was approved)
- Can enter multiple FRNs and multiple SPINs on the same BEAR
- Tabs for Submitted Forms, Pending Tasks, Pending Inquiries
- Real-time status reports by FRN Line Item in EPC:
  - Incomplete, Certified, Processed, Cancelled
- Ability to see the date BEAR was paid
- Better invoicing decision explanations



## Heads-up:

- You must select the funding year for each FRN you want to add to the form
- Make sure the banking info is correct on your Form 498
- If you need to modify your Form 498, you must have a current SAM.gov UEI
- If your service provider has not filed a SPAC for the funding year you're asking for reimbursement, the FRN will not be displayed

## Invoice Disbursements Data Lookup Tool

- Shows details for all *disbursements* authorized since July 2016
  - Does not show pending invoices

<https://opendata.usac.org/E-Rate/E-Rate-Invoice-Disbursements-Data-Lookup-Tool/t3vg-gfse>

# *Where Are You At For FY 2025*

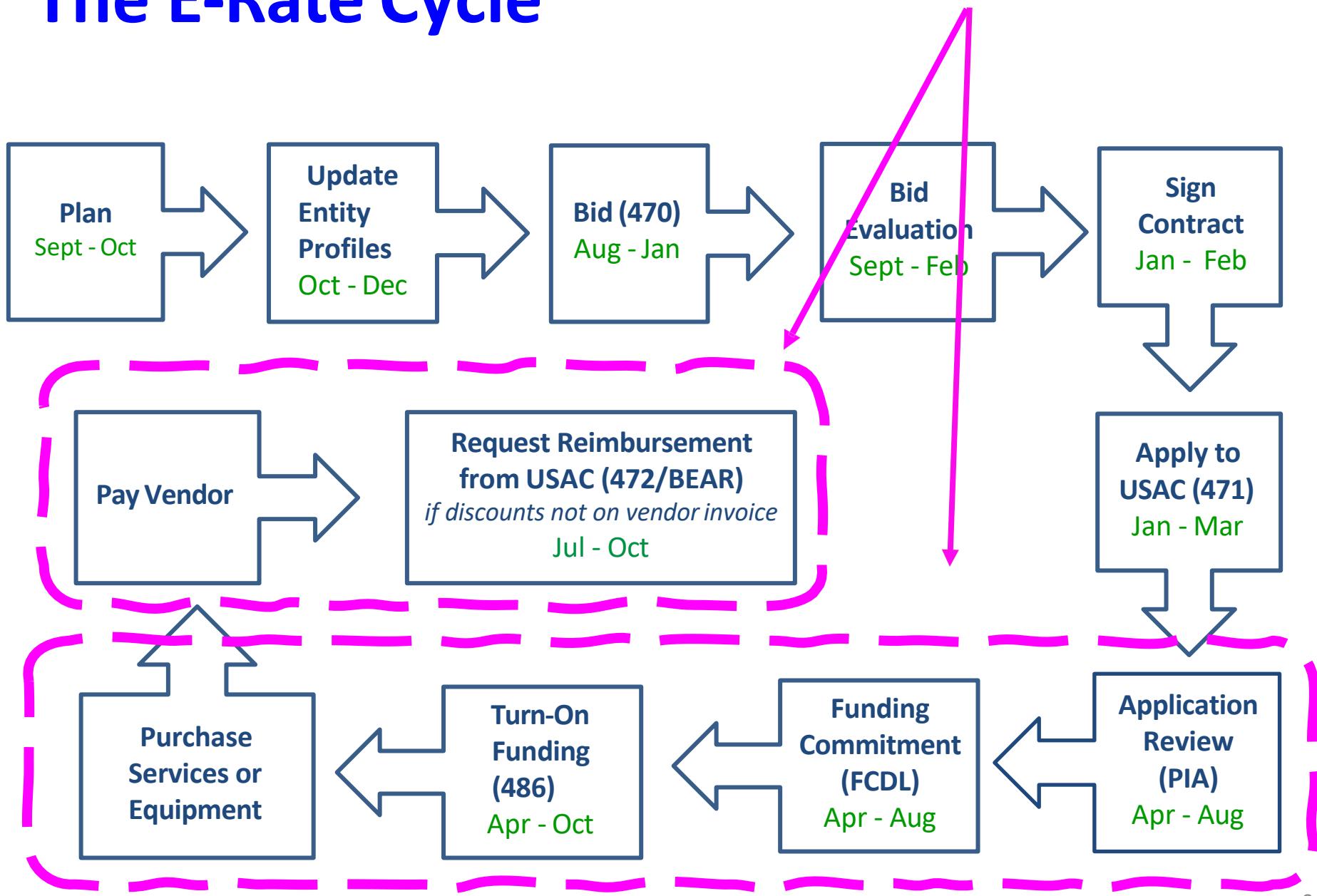
*(July 1, 2025 – June 30, 2026)*



*Updates & Where Are You  
At In The Process*

# The E-Rate Cycle

For FY 2025, we are here



# 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**

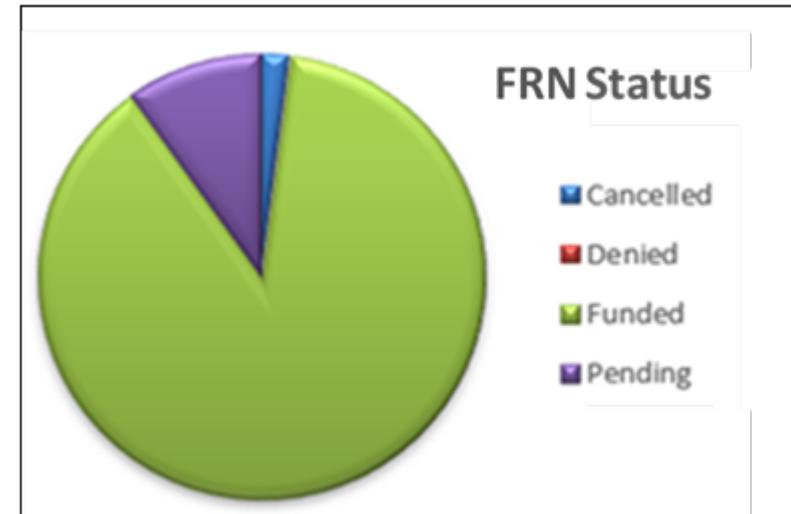
# Status of PA FY2025 FCDLs

| Service Type                               | No. of FRNs  | Funding Amount         |
|--|--------------|------------------------|
| Basic Maintenance of Internal Connections  | 81           | \$716,547.87           |
| Data Transmission and/or Internet Access   | 1,394        | \$34,621,928.37        |
| Internal Connections                       | 744          | \$45,459,411.60        |
| Managed Internal Broadband Services        | 24           | \$322,306.46           |
| Wi-Fi Hotspots Services and Equipment      | 16           | \$1,302,232.10         |
| Wireless School Bus Services and Equipment | 11           | \$529,918.76           |
| <b>Grand Total</b>                         | <b>2,270</b> | <b>\$82,952,345.16</b> |

# Status of PA FY 2025 FCDLs

- Of the 2261 FRNs submitted (less Bus Wi-Fi/HS):

| Status       | Funding Requested      | No. of FRN   |
|--------------|------------------------|--------------|
| Cancelled    | \$1,569,078.29         | 66           |
| Denied       | \$117,290.47           | 12           |
| Funded       | \$71,429,766.24        | 2,092        |
| Pending      | \$8,004,059.30         | 91           |
| <b>Total</b> | <b>\$81,120,194.30</b> | <b>2,261</b> |



- \$73.4 million committed thus far
  - Of the funded 2092 FRNs, **188 still need a Form 486 filed**
  - **43 of the FRNs are for IC**
- 91 FRNs still “pending” for 29 entities totaling \$8 million

# FY2025 FCDLs – Has Everything Been Funded

- If your Form 471 applications have not been funded
  - What is the current PIA status? Very important to verify that!
  - Reach out to Lorrie if no PIA contact has been received in the last 3 weeks
- If you've received the FCDL, were there unexpected denials?
  - Remember, you have 60 days from the date of the FCDL to file an appeal!

If you've had a post-commitment change request (SPIN changes, service substitutions, appeals) or a BEAR form pending for more than 60 days, use the "Contact Us" feature in EPC to request that it be escalated.

TIP!

TIP!

# FY 2025 Sources of Confusion

- FY 2025 Denials:
  - Only 12 FRNs denied (affecting 8 applicants)
  - \$117,290 denied Denial reasons:
    - Thirty percent or more of the FRN included a request for ineligible products or services
    - Category 2 budget was not sufficient
    - Ineligible equipment requested
    - Services requested was for an ineligible entity
    - Posted 470 in the wrong category
  - **If you have a question, please ask!**



# FY 2025 Form 486s

- If you have been funded for FY 2025, don't forget to file your Form 486 to "turn-on funding" and certify CIPA compliance
  - 91 PA entities still need to file
  - 486 Due List (as of 10/20) available at: <https://e-ratepa.org/wp-content/uploads/2025/10/FY2025-486-Due-List-as-of-10-23-2025.xlsx>
  - **For internal connections, file 486 now (don't wait)**
- You must wait until you receive an FCDL to file the 486
- Deadline is 120 days after FCDL date or October 28, whichever is later
- VERY easy form to file in EPC (no data entry)
  - Guide at: <https://E-Ratepa.org/?p=35452>
  - **Be careful when clicking on CIPA certifications**
    - These toggle instead of staying checked!
- If you ever file Form 486 late and USAC modifies your Service Start Date, hence reducing your E-Rate commitment, let me know as soon as you file the late Form 486
  - I can help you appeal to restore your \$!

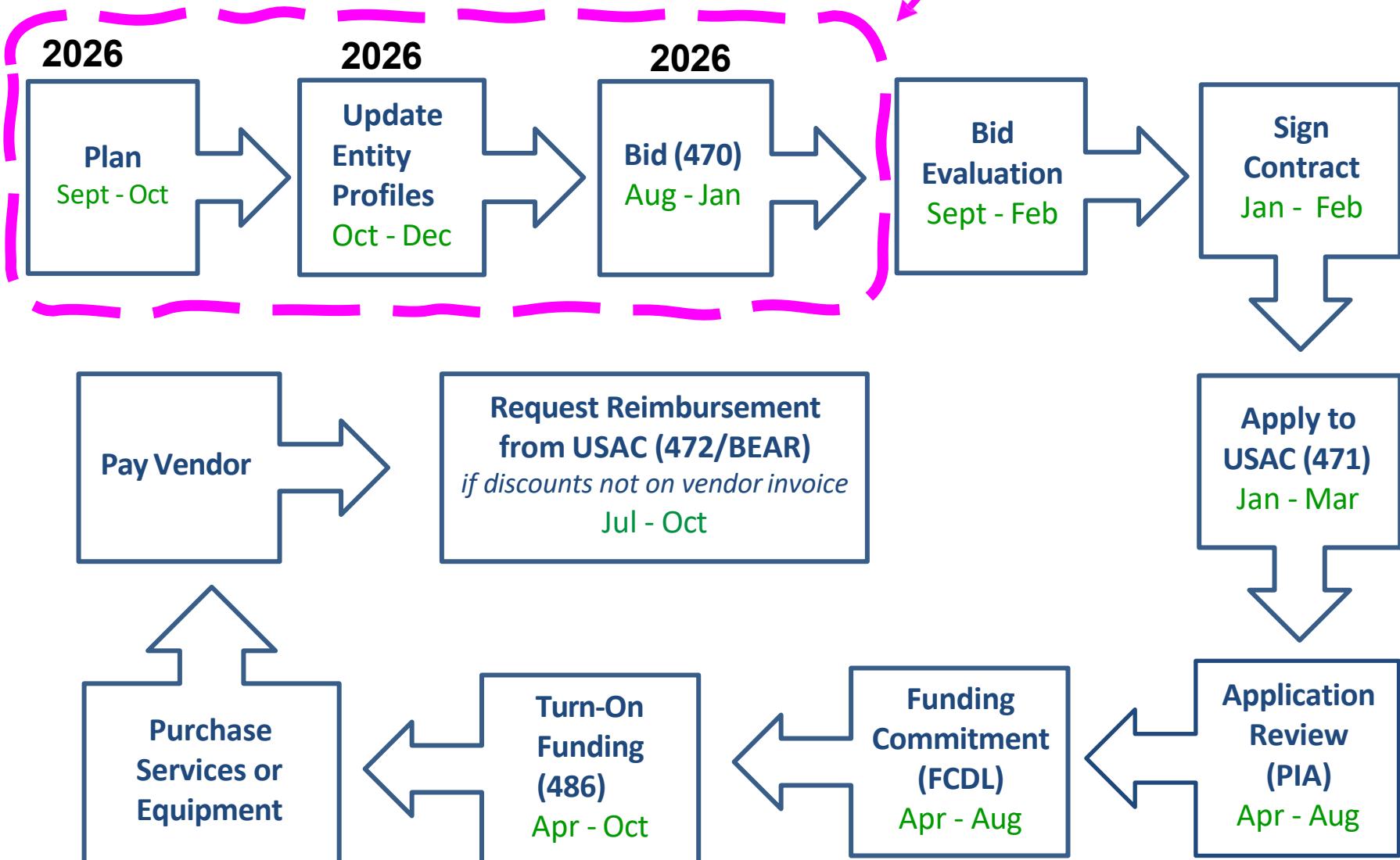
**TIPS!**

# *Preparing For Funding Year 2026... (July 1, 2026 – June 30, 2027)*



# The E-Rate Cycle

For FY 2026, we are here



# FY 2026 “Admin Window”

- Admin Window is 2-3 months before the Form 471 window when schools and libraries update their school or library profiles in EPC portal
  - Opened October 15. Usually closes 2 days before Form 471 filing window opens in January
  - This data is then ported over into the Form 471
- **Mainly used to update:**
  - **E-Rate Discounts:** Must update school profiles with current enrollment/NSLP data to calculate E-Rate discounts for upcoming year
    - Lorrie will obtain October 2025 enrollment/NSLP/CEP data from PDE in mid-December and send to listserve
    - **Most schools wait until then to update EPC profiles**
  - **Category 2 Budgets:** Update enrollment (schools) and square footage changes (libraries)
    - Category 2 enrollment data can be different from annual discount-rate enrollment data
    - C2 enrollment data entered in separate location in EPC



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

# 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
- The C2 budget is calculated at the school district or library system level based on the combined student enrollment
- 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
- You are not required to update after the first year you apply for C2
- You CAN update in a future year if it will increase your C2 budget
  - You Must then ask for C2 Budget Recalculation from USAC

# FY2026-2030 C2 Budget Cycle

## Schools

- \$201.57/student
- \$30,175 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

## Libraries

- \$5.43/square foot
- \$30,175 funding floor
  - This means a library **with less than 5,5558 square feet** ( $\$5.43/\text{square feet} * 5,557 \text{ square feet} = \$30,174.51$ ) receives the funding floor

# 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

Review these columns:

C2  
enrollment  
currently in  
EPC

5-Year Pre-  
Discount C2  
Budget

▼ Filters (2) X

[Clear All](#)

|                            |                                     |
|----------------------------|-------------------------------------|
| State                      | <input type="text"/>                |
| Applicant Type             | <input type="text"/>                |
| City                       | <input type="text"/>                |
| Billed Entity Name         | <input type="text"/>                |
| BEN                        | <input type="text" value="125000"/> |
| Consulting Firm Name (CRN) | <input type="text"/>                |

| 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... |

“Funded”  
amount from  
FY2026-  
FY 2030

Any  
Amount  
“pending”  
in FY2026-  
2030

Remaining  
available  
C2 Budget

# EPC Category 2 Budget Tool

News Tasks (1) Records **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”.

**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

4

▼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 enrollment reported. Clicking on “View Details” will show the funding breakdown by funding year.

# 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

# Draft FY2026 ESL

- FCC has released the draft ESL and 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

# Draft FY2026 ESL...Continued

The FCC also seeks comment on whether changes should be made regarding managed internal broadband services (**MIBS**).

- Are there any substantial benefits for funding MIBS?
- Are there any cost savings and efficiencies for funding MIBS?
- Should MIBS be more narrowly defined so there is no overlap with BMIC services?
- How can we provide greater clarity in differentiating between MIBS and BMIC services in the ESL?
- Should these changes be made for the current funding year or for future funding years?

**Initial comments were originally due October 15th, will now be due one business day after the government shutdown ends.**

**The deadline for reply comments, initially due October 30th, may be rescheduled accordingly**

# E-Rate Simplification – Covered Last Year, But Bears Repeating!

- **10% Internet Access Hold Harmless**
  - Up to 10% can be used for ineligible purposes
  - Important for schools with ineligible Pre-K students and CTCs that provide adult ed classes
  - Other usage during the school day
  - Applicants may seek E-Rate funding for **only** the amount of bandwidth needed for eligible use
- **Full Eligibility for Data Network Cabling:**
  - The FCC clarified that structured cabling in a school or library may be connected to ineligible equipment such as security cameras, voice equipment, smoke detectors, etc.
    - If the network primarily served an eligible purpose (i.e., distributing broadband throughout a school or library building), the full cost of the cabling is eligible.
    - **However, networks that are dedicated to an ineligible purpose, such as security networks or voice networks, remain ineligible**

# Random Topics/Reminders

- **FY 2026 Category 1 Rebid List** will be sent to the listserve next week
- **Contract Extension Reminder:** If your current contract includes a specific # of voluntary extensions, and you want to exercise one of those extensions, you are not required to post a new Form 470 to use one of the extensions
  - BUT... you **must** have written documentation to the vendor notifying them that you are electing to extend your contract, pursuant to one of the extension terms in your original contract
- **Changes to RFP:** If you issue any changes or clarifications to your RFP (including posting answers to vendor questions), you must extend the bid due date by another 28 days
  - Build in a vendor question due date to your RFP timeline and then add 2 weeks to your bid due date (for a total of about 6.5 weeks total)
- **Labeling** - When receiving equipment, be sure to label each piece and record in asset inventory
  - Make/model/serial number/building/room/FRN/date installed
  - Sample: <http://E-Ratepa.org/wp-content/uploads/2014/03/Asset-Register-Sample.xlsx>

**TIP!**

# FY 2026 Application Timeline

- Recommended timeline:
  - November: File Form 470s by Thanksgiving
    - Vendor questions due 2 weeks later
    - Upload answers to 470 posting
  - End of December/Early January: Vendor bids submitted
    - 29 days after uploading answers to vendor questions
  - Mid-December: Update EPC profiles after Lorrie sends updated data
  - January: Bid evaluation, board agenda submission
  - February: School board approval, sign contracts
  - February/March: File Form 471
- **Form 470s being accepted in EPC NOW**
  - Don't wait until January to file 470s!

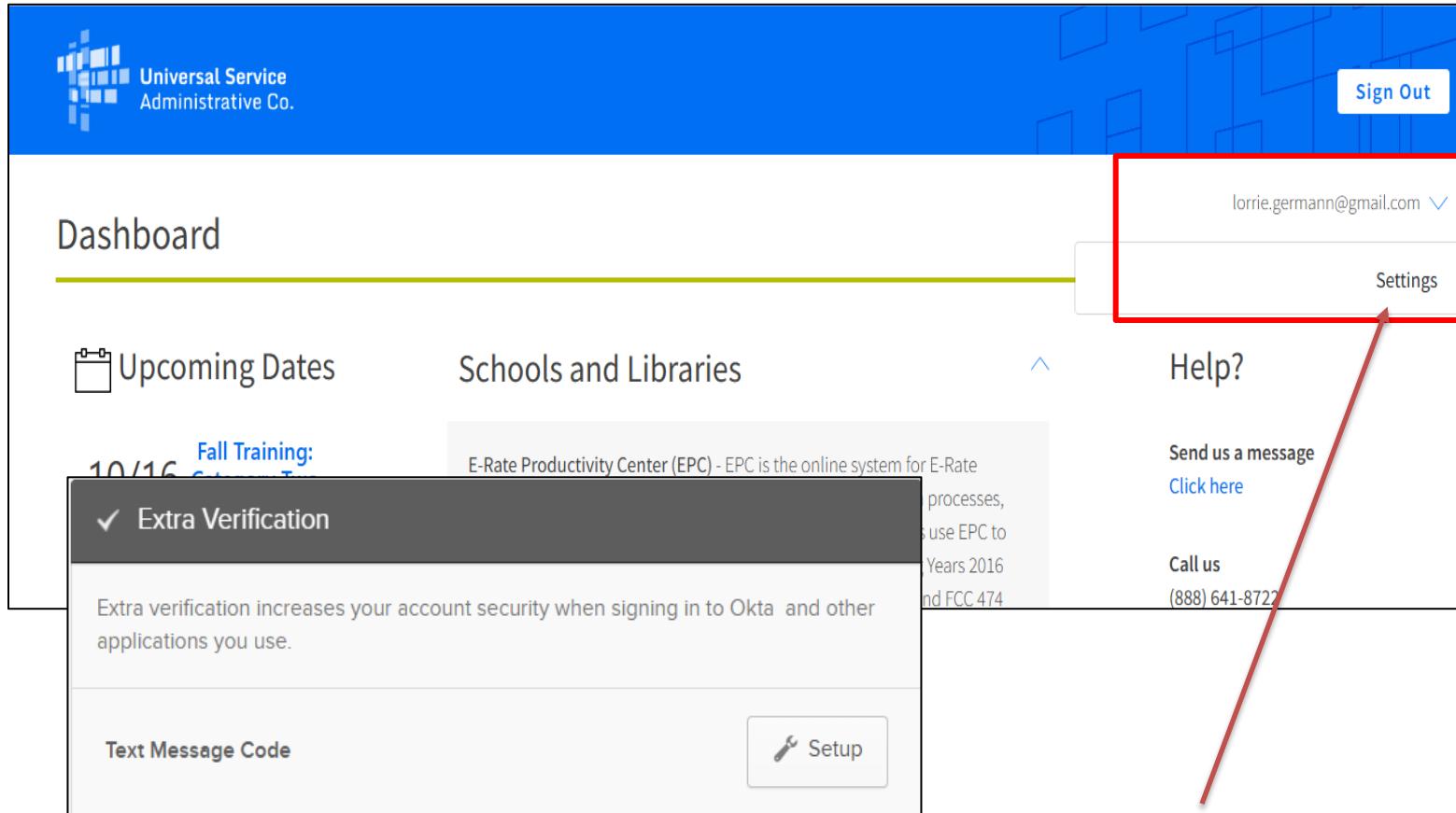


# Using PEPPM for C2 Procurement

- If your school or library signed the PEPPM LOA, they may use the state PEPPM contract for Category 2 purchases
- No Form 470 is required, but PEPPM mini-bid process is required
  - All vendors in a certain 'category' must receive mini-bid equipment list
  - Proposals must be accepted for 14 days
  - Factors besides price may be considered
- **NOTE FOR FY2026 ONLY:** If you intend to use the PEPPM Mini-bid system for your FY 2026 Category 2 equipment purchases, **YOU CANNOT RELEASE A PEPPM MINI-BID TO VENDORS UNTIL AT LEAST JANUARY 2, 2026.** However, this is a great time to start creating your equipment lists so that you're ready to release the mini-bids come January 2<sup>nd</sup>
- **PEPPM bidding guide will be posted soon**



# Portal Access – Add Text MFA Option



Universal Service Administrative Co.

Sign Out

Dashboard

Upcoming Dates

10/16 Fall Training: [View Details](#)

Schools and Libraries

E-Rate Productivity Center (EPC) - EPC is the online system for E-Rate processes, and other applications you use. Years 2016 and FCC 474

Help?

Send us a message [Click here](#)

Call us [\(888\) 641-8722](#)

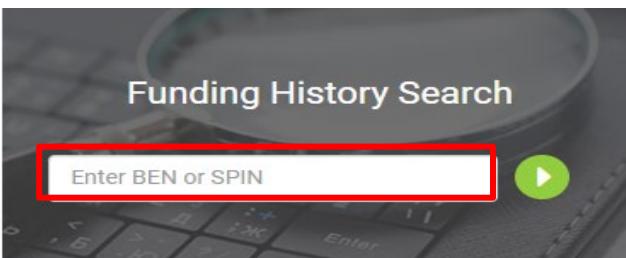
Text Message Code

Setup

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”.

# Quick Way to Your Funding Information

Go to: [www.E-Ratecentral.com](http://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            |

| 471   | FRN        | SPIN | Service Provider                              | Service* | Original Request | Current Commitment |
|---|------------|------|---|----------|------------------|--------------------|
| 251021015   | 2599026407 |      | 110000004 Wireless Ohio Computer Organization |          |                  |                    |
| <b>471 Information</b>  |            |      |   |          |                  |                    |
| <b>471#:</b> 251016864  |            |      |   |          |                  |                    |
| <b>SPIN:</b> 143001654  |            |      |   |          |                  |                    |
| <b>Service Type:</b> Data Transmission and/or Internet Access |            |      |   |          |                  |                    |
| <b>Status:</b> Funded   |            |      |   |          |                  |                    |
| <b>Status Memo:</b> • MR1:Approved as submitted.              |            |      |   |          |                  |                    |
| <b>Service Start Date (471):</b> 7/1/2025                     |            |      |   |          |                  |                    |
| <b>Current Commitment:</b> \$25,423.20                        |            |      |   |          |                  |                    |
| <b>Disbursed Amount:*</b>                                     |            |      |   |          |                  |                    |
| <b>Last Date of Service:</b>                                  |            |      |   |          |                  |                    |
| <b>Service Start Date (486):</b> 7/1/2025                     |            |      |   |          |                  |                    |
| <b>Payment Mode:</b> NOT SET                                  |            |      |   |          |                  |                    |
| <b>Undisbursed:</b> 25423.20                                  |            |      |   |          |                  |                    |
| <b>Last Date to Invoice:</b> 10/28/2026                       |            |      |   |          |                  |                    |

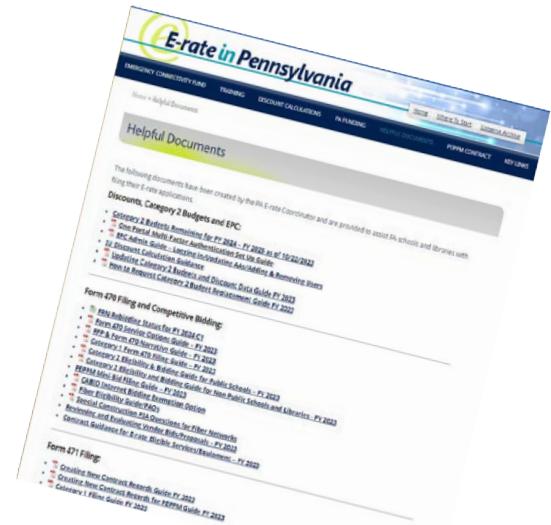
1. Enter your Billed Entity Number.
2. Click on Funding Year
3. See your 471, FRN, and SPIN information.
4. Click on the FRN number to see full detail

# QUESTIONS



# 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](mailto:lgermann@E-Ratepa.org)
  - 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)