



# TRAINING AGENDA

- E-Rate Basics
  - – COVID-19 Impact
- Category 2
  - – New Rules Beginning FY2021
- Application Process
  - Break (10:30 or so)
- Eligible Services
- Portal Fundamentals

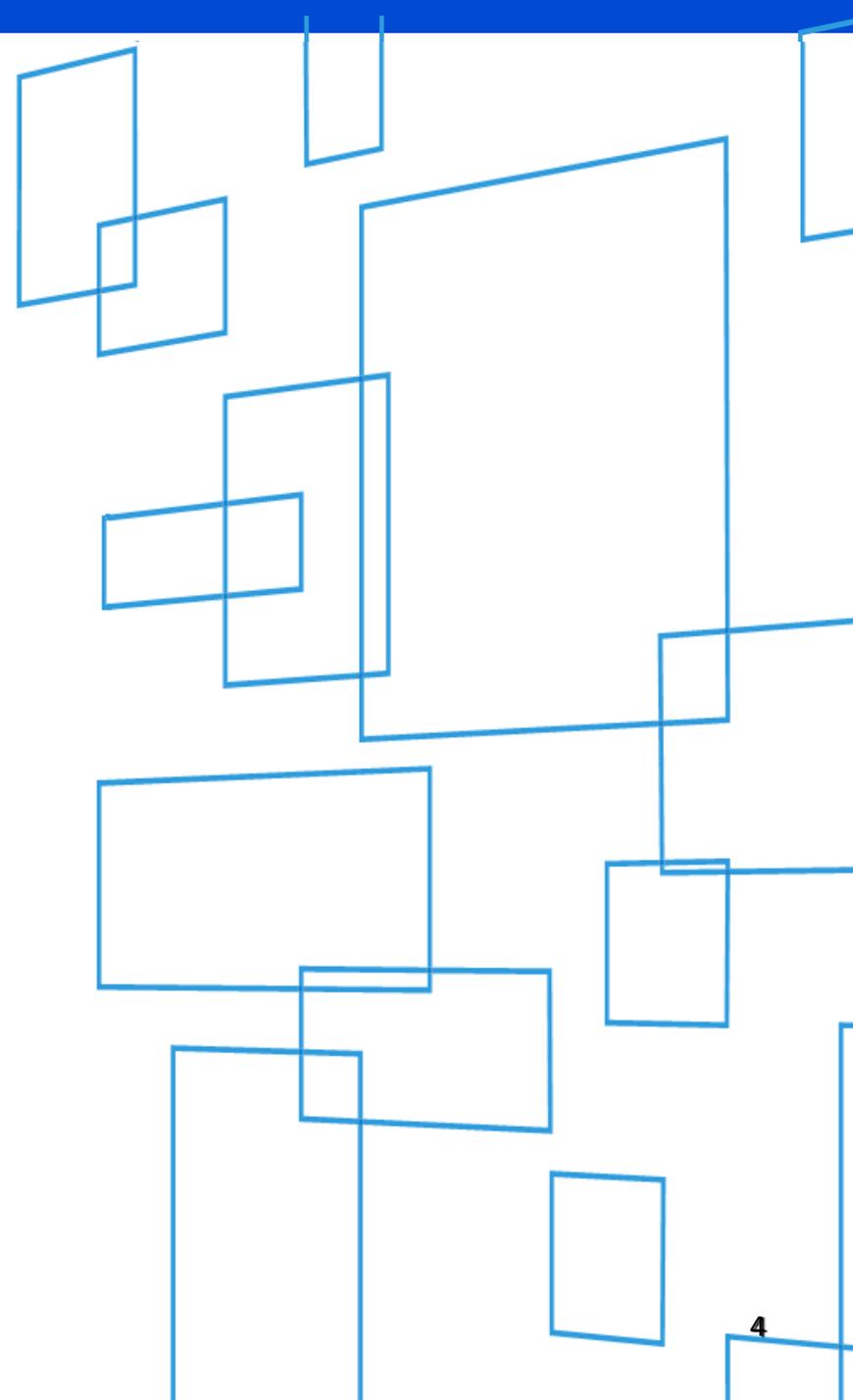
# E-Rate Basics



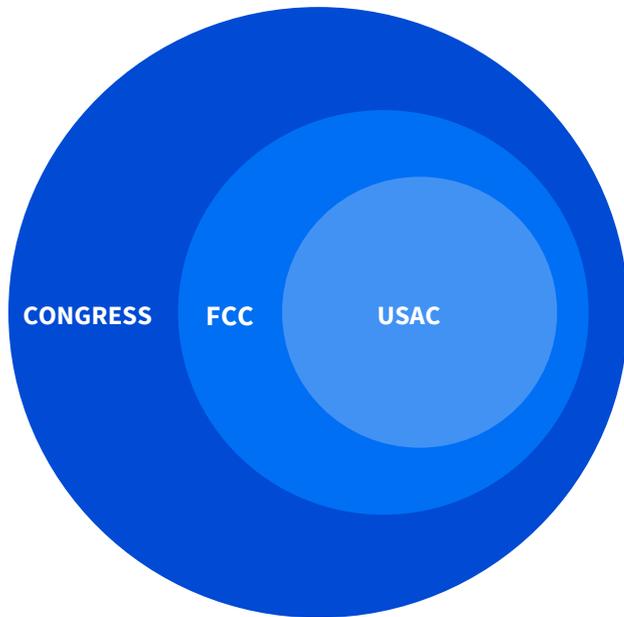
## Mission Statement

*Help ensure that schools and libraries can obtain high-speed internet access and bandwidth at affordable rates and keep students and library patrons connected to broadband by providing a discount on eligible services.*

*Note: E-Rate is a discount program, not a grant.*



## WHO MAKES THE RULES?



- Congress wrote the Telecommunications Act of 1996, which directed the Federal Communications Commission (FCC) to establish the E-Rate Program as part of the Universal Service Fund.
- The FCC issues orders that set rules and policies for the program and gives direction to the Universal Service Administrative Company (USAC) through orders.
- USAC is responsible for the day-to-day administration of the E-Rate Program.

E-Rate funding commitments are made by funding year.

- A Funding Year (FY) starts on July 1 and ends the following June 30.
- USAC refers to the funding year as the year in which most services will begin (different from fiscal or school years).
- For example, FY2021 starts on July 1, 2021, and ends on June 30, 2022.



# WHAT PRODUCTS AND SERVICES ARE ELIGIBLE?

## E-Rate has two categories of funding:

### \*Category One (C1)

\*Provides connectivity **to** the building

Data Transmission Services (bandwidth) and Internet Access

### \*Category Two (C2)

\*Provides connectivity **within** the building

#### Broken down by 3 Service Types:

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

**Category One (C1)** services are not limited in cost as long as they are cost-effective.

- All buildings within the district qualify for service

**Category Two (C2)** services are limited by a pre-discount budget.

- Budget period is five years.
- Budget is calculated based on the number of students district wide.
- Only schools qualify, not support facilities (bus garage, maintenance, or admin buildings)

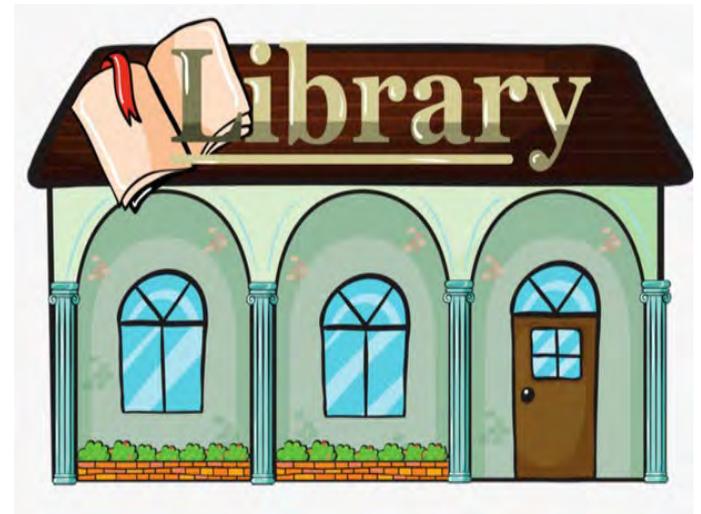
# ELIGIBILITY - Schools

- Must provide elementary and/or secondary education, as determined under state law.
  - Non-traditional facilities/students (Special Needs Pre-K and juvenile justice) are eligible in Ohio.
- Cannot have an endowment exceeding \$50 million.
- Cannot operate as a for-profit business.



# ELIGIBILITY - Libraries

- Must be eligible for assistance from their state library agency under LSTA\*.
- Budget must be separate from any schools.
  - Bookmobiles and kiosks are eligible if they are considered library branches in their state.
- Cannot operate as a for-profit business.



\* LSTA = Library Services and Technology Act

# ELIGIBILITY – Non-instructional Facilities (NIFs)

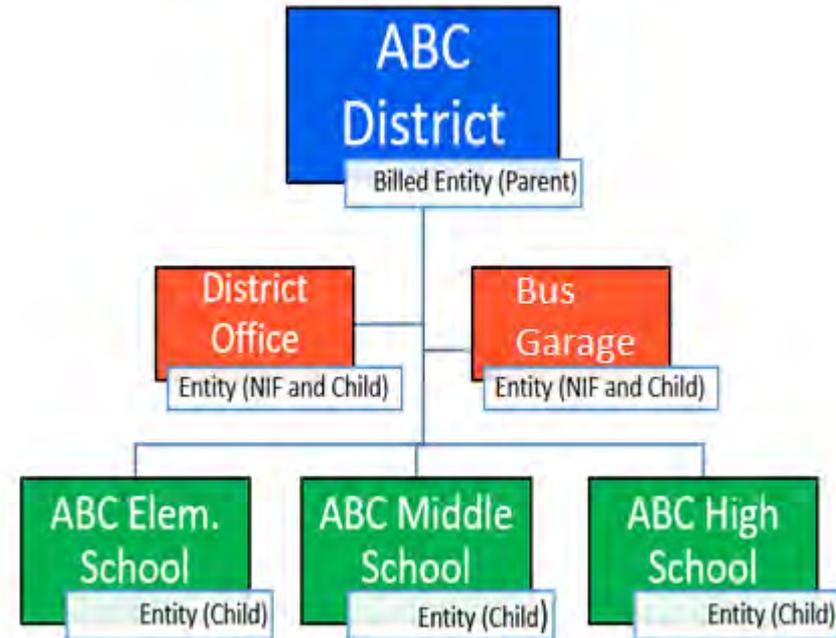
- Non-instructional facilities (NIFs) are eligible for discounts for **Category 1 only**.
- NIFs are:
  - School buildings that typically don't have classrooms (admin facility, bus garage, athletic facility).
  - Library buildings that don't have public areas.



# IDENTIFYING NUMBERS - BENs

Each applicant entity is assigned an “entity number” in the system.

- Each entity that receives and pays the bills is assigned a **Billed Entity Number (BEN)**.
  - This is not the same as an IRN
  - In a district or library system, the BEN is the “parent” organization
  - Each school, library, or NIF under the “BEN” is assigned an entity number.



# IDENTIFYING NUMBERS - SPINs

A **Service Provider Identification Number (SPIN)** is assigned to providers participating in E-Rate.

- Service providers may have more than one SPIN due to:
  - Different business units or service areas.
  - Mergers and acquisitions.
- It's important to ask any new provider/vendor if they have a SPIN when offering E-Rate eligible products/services.



# ELIGIBILITY – Eligible Purposes

- Activities related to education that occur **on school property.**
- Activities related to providing library services to individuals that occur **on library property.**



**\* Activities that are not on school or library property are generally not considered eligible for discounts.**

# YOUR E-RATE DISCOUNT

- Discounts range from 20% to 90% for Category 1 services and from 20 to 85% for Category 2 services.
- Discounts are calculated using three pieces of information:
  - Poverty level
  - Urban or rural status
  - Service type

## Schools:

Discounts depend on two factors:

- The level of poverty (the percentage of NSLP\* eligibility) in the school district.
- The urban or rural status of the school district based on census data.
- Discounts are calculated for the school district or the library system (not for individual schools or library branch).

\*NSLP = National School Lunch Program

## Libraries:

- Determine the main branch of the library.
- Determine the school district in which the main branch of the library is located.
- Use the NSLP percentage calculation for that school district.
- Discounts are calculated for the library system (not for individual library branches).

# DISCOUNT MATRIX

<b>INCOME</b> Measured by percentage of students eligible for NSLP	<b>DISCOUNT</b>	
	<b>URBAN</b>	<b>RURAL</b>
<b>Less than 1%</b>	20	25
<b>1% to 19%</b>	40	50
<b>20% to 34%</b>	50	60
<b>35% to 49%</b>	60	70
<b>50% to 74%</b>	80	80
<b>75% to 100%</b>	90 for C1, 85 for C2	90 for C1, 85 for C2

- Due to COVID, the USDA extended free lunches for all students through 6/30/2021. **That does not mean that all schools and libraries will receive the highest discount rate.**
  - There's not enough money in the fund to allow that!!
- Many schools are counting both on-site and remote learners in their enrollment, but not collecting NSLP data for the remote students.
- In both cases, the discount rate will be skewed.

**So....what numbers do we use?**

# DISCOUNTS: How to Determine Your Poverty Level

## What numbers should I use due to COVID-19?

- Most use the student/NSLP counts reported to ODE's **Office of Child Nutrition** for the month of October.
  - This information is published in the annual MR-81 report.
  - **For FY2021, we will use the October 2019 version (or whatever counts were used last filing season.**
  - If may have used counts from a Monthly Site Claim Form, CN-7 report, **survey**, etc., prior to the filing the Form 471 application last year.
  - If your counts are different from the counts listed in the MR-81, you will be asked how you determined the information. Be sure to document how you arrived at your total numbers.

# Discount Calculations

## Data from the MR-81

- Which numbers to use -

County	Sponsor IRN	Sponsor	Site IRN	Site Name	NSLP Provision	Enrollment	Free Lunch Applications	Reduced Price Lunch Applications	Total Free/Reduced Price Lunch Applications	Percent Free Lunch	Percent Reduced Price Lunch	Percent Free and Reduced Price Lunch	CEP Eligible Students	CEP Percentage (Number to use in EPC portal if school participates in CEP)
Columbiana	044735	Salem City Sd	00004119	Buckeye Elementary School	Community Eligibility Provision	455	-	-	-	-	-	79.12%	225	49.45%
Columbiana	044735	Salem City Sd	00031328	Reilly Elementary School	Traditional	374	187	17	204	50.00%	4.55%	54.55%	-	
Columbiana	044735	Salem City Sd	00033472	Salem High School	Traditional	680	240	37	277	35.29%	5.44%	40.74%	-	
Columbiana	044735	Salem City Sd	00033431	Salem Junior High School	Traditional	339	143	24	167	42.18%	7.08%	49.26%	-	
Columbiana	044735	Salem City Sd	00043000	Southeast Elementary School	Traditional	322	153	24	177	47.52%	7.45%	54.97%	-	

- **Enrollment**
- **Total Free/Reduced Price Lunch Applications**
- **or**
- **Community Eligibility Percentage (if participating in CEP)**

# Are You Participating in the Community Eligibility Provision (CEP)

- Nationwide program to reduce NSLP paperwork burden.
- Schools must have at least 40% of their students directly certified to qualify for CEP.
- All students may eat free, but this does not mean they are counted as eligible for E-Rate purposes. Must still determine eligibility percentage.
- Schools apply national multiplier (1.6) to directly certified population to determine NSLP eligible population.
- Schools must renew their direct cert numbers once every four years to maintain eligibility. However, *schools* may update their direct certification numbers annually to capture more current information.
- The year you apply and qualify is considered your “Base Year”.

## What if we don't participate in the National School Lunch Program?

- You're not required to participate in NSLP to receive a discount percentage, but you do have to determine the level of need.
- A school may design a survey that provides the necessary information that measures a family's level of need
- Surveys must be based on the following guidelines:
  - The survey must be sent to all families whose children attend the school.
  - The survey must, at a minimum, contain the following information:
    - ◇ Name of family and students;
    - ◇ Size of the family; and
    - ◇ Income level of the family.

# NSLP Income Eligibility

- If using the survey method, you must use the NSLP Income Eligibility Guidelines
- Data collected for scholarships can be used if the income eligibility meets the NSLP guidelines
- For the 2020 NSLP Income Eligibility Guidelines, go to <https://www.fns.usda.gov/cnp/fr-032020>

INCOME ELIGIBILITY GUIDELINES												
Effective from July 1, 2020 to June 30, 2021												
HOUSEHOLD SIZE	FEDERAL POVERTY GUIDELINES	REDUCED PRICE MEALS - 185 %					FREE MEALS - 130 %					
	ANNUAL	ANNUAL	MONTHLY	TWICE PER MONTH	EVERY TWO WEEKS	WEEKLY	ANNUAL	MONTHLY	TWICE PER MONTH	EVERY TWO WEEKS	WEEKLY	
<b>48 CONTIGUOUS STATES, DISTRICT OF COLUMBIA, GUAM, AND TERRITORIES</b>												
1 .....	12,760	23,606	1,968	984	908	454	16,588	1,383	692	638	319	
2 .....	17,240	31,894	2,658	1,329	1,227	614	22,412	1,868	934	862	431	
3 .....	21,720	40,182	3,349	1,675	1,546	773	28,236	2,353	1,177	1,086	543	
4 .....	26,200	48,470	4,040	2,020	1,865	933	34,060	2,839	1,420	1,310	655	
5 .....	30,680	56,758	4,730	2,365	2,183	1,092	39,884	3,324	1,662	1,534	767	
6 .....	35,160	65,046	5,421	2,711	2,502	1,251	45,708	3,809	1,905	1,758	879	
7 .....	39,640	73,334	6,112	3,056	2,821	1,411	51,532	4,295	2,148	1,982	991	
8 .....	44,120	81,622	6,802	3,401	3,140	1,570	57,356	4,780	2,390	2,206	1,103	
For each add'l family member, add	4,480	8,288	691	346	319	160	5,824	486	243	224	112	

# ADMIN WINDOW: UPDATING ENTITY INFORMATION

- The Admin Window is the period of time we update entity information in EPC – the online E-Rate portal
- It opened on October 19<sup>th</sup> – closes several days prior to the opening of the Form 471 window.
- This includes:
  - Adding new buildings
  - Correcting addresses
  - Correcting student/NSLP data
  - Adding Category 2 budget counts

# Category 2 Budgets - FY2021 and Beyond



- The FCC has made C2 funding permanent
- All C2 budgets will reset in FY2021
- We will have a set 5-year cycle (FY2021-FY2025), (FY2026-FY2030), etc.
- C2 budget will be calculated at district or library system level (one consolidated budget)
- Multiplier will be set for the full 5-year cycle and will not be adjusted for inflation each year
  - **FY2021-FY2025 = \$167.00/per student**
  - **FY2021-FY2025 = \$4.50 sq. ft. for ALL libraries**
  - **FY2021-FY2025 Budget Floor/Minimum = \$25,000.00**
    - *Budget floor applies to schools with less than **150 students**, or libraries with less than **5556 sq. ft.***

- **Enrollment will remain static for entire budget cycle, based on the first year an applicant applies for C2.**
  - Optional: schools may update C2 budget enrollment in subsequent year(s) if enrollment increases.
- **Budget is based on full-time enrollment, not a combination of full and part-time as previously used.**
  - If all of your students are part-time (or primarily) such as with a vocational school, count them as full-time students.
- No funding available for non-instruction facilities (no change).
- **Equipment transfer restrictions will be eliminated beginning in FY2021, but:**
  - applicants must record reason and date of transfer and update asset inventory.
  - no notice to USAC is required.

# Calculating Your Budget – OPTIONS

- Paragraphs 40 of the C2 Order state:

40. "...we recognize that smaller school districts have less access to shared resources and are more likely to be located in rural areas where funding is scarce. **As such, we create an exception for small school districts.** Specifically, we give school districts with 10 or fewer sites the option to calculate their budgets on a per-site basis by **adding together** the budgets of each eligible site within the district.

- **The above premise applies to libraries as well!**

- For Districts with **10 or less schools** – 3 options

- OPTION 1: Calculate by total number of **STUDENTS** (per student)
- OPTION 2: Calculate by total number of **SCHOOLS** (\$25,000 per school)
- OPTION 3: Calculate BY SCHOOL using either per student or \$25,000 per school or a **COMBINATION OF BOTH** methods
- **Use the HIGHEST aggregate total**

# Sample Calculation for 10 or Less Schools

ABC School District has 5 schools:

School	Student Count	Budget Calculation (\$167/student)	Budget Received (Use minimum budget if calculation is less)
ABC High School	567	\$94,689	\$94,689
ABC Middle School	532	\$88,844	\$88,844
ABC Elementary	212	\$35,404	\$35,404
West Elementary	125	\$20,875	\$25,000
East Elementary	131	\$21,877	\$25,000
<b>Totals</b>	<b>1567</b>	\$261,689	<b>\$268,937</b>

Based on student count

Based on budget floor

- Remember, schools with LESS THAN 150 students are eligible for the budget floor - \$25,000.00
  - Same premise applies to libraries
- Use the HIGHEST aggregate total**

# Calculating Your Budget – OPTIONS

Footnote #103 of the C2 Order states:

[<sup>103</sup>] ...a school district with 10,000 students would normally have an aggregate budget of \$1,670,000. If those students were spread across 100 schools, then its budget would instead be \$2,500,000 (the aggregate funding floor). Accordingly, the funding floor only comes into play if the aggregate budget for the system would fall under the aggregate funding floor for the system.

**For Districts with 11 or more schools – 2 options**

OPTION 1: Calculate by total number of STUDENTS

**or**

OPTION 2: Calculate by total number of SCHOOLS (@\$25,000 per school)

**Use the higher of the two totals**

# Category 2 Budget Tool

USAC has created a new Category 2 budget tool at: <https://www.usac.org/e-rate/>. Click on “Tools” and then scroll down to “**Category Two Budget Tools**” and click on “**FY2021+ Category Two Budget Tool**”. Search by BEN, press “Enter” and then click on “Apply”.

The screenshot shows the E-rate C2 Budget Tool FY2021+ interface. The main area features a bar chart with a legend for 'Funded C2 Budget Amount', 'Pending C2 Budget Amount', and 'Available C2 Budget Amount'. The x-axis represents budget amounts from \$0 to \$450K. A sidebar on the right contains filters for State, Applicant Type, City, Billed Entity Name, BEN (set to 130001), and Consulting Firm Name (CRN). An 'Export' button is located in the top right corner. Below the chart is a data table with columns for BEN, Billed, City, State, Appli..., Consu..., C2 Bu..., Child..., C2 Bu..., Full TL..., Librar..., Schoo..., Librar..., C2 Bu..., C2 Bu..., C2 Pe..., Fund..., Pend..., and Avalla... The first row of data is highlighted with a red box.

BEN	Billed	City	State	Appli...	Consu...	C2 Bu...	Child...	C2 Bu...	Full TL...	Librar...	Schoo...	Librar...	C2 Bu...	C2 Bu...	C2 Pe...	Fund...	Pend...	Avalla...
130001	CHILLICOT...	CHILLICOT...	OH	School Dis...	Education...	FY2021-20...	5	School Dis...	2,954		\$167.00		\$493,318.00	Forecast		\$0.00	\$0.00	\$493,318.00

# Category 2 Budget Tool

The “FY2021+ Category Two Budget Tool” gives us the option to export the budget information to get a clearer view:

BEN	Billed Entity Name	Child Entity Count	C2 Budget Algorithm	Full Time Students	School Student Multiplier	C2 Budget	C2 Budget Version	C2 Per Site Basis Difference
129582	CAMPBELL LOCAL SCHOOLS	3	Per Site Basis School District	1,063	\$167.00	\$196,175.00	Forecast	\$18,654.00

- Indicates how the budget was calculated and the difference by using the specified method.

**CAMPBELL LOCAL SCHOOLS (BEN: 129582) - FY2020**

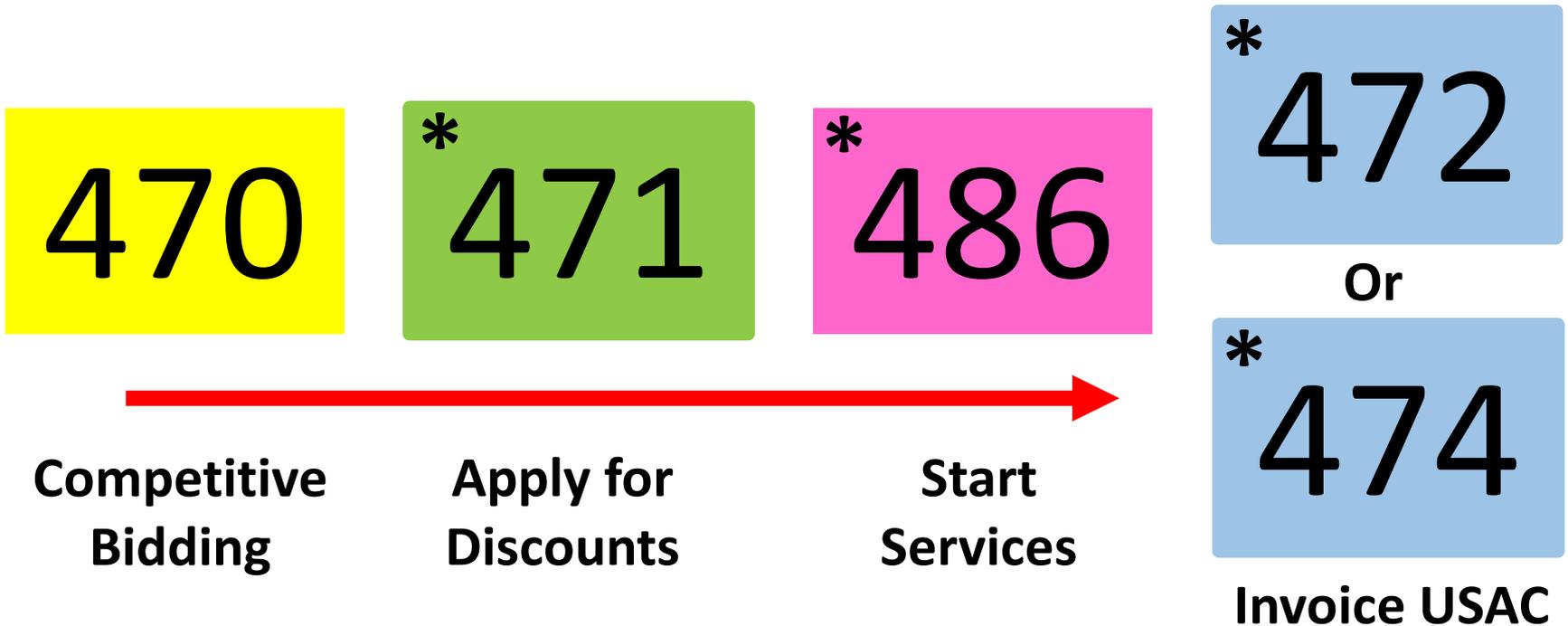
School District Full-time Enrollment	School District NSLP Count	School District NSLP Percent
1063	1063	100%

**Entity Details**

Organization	BEN	Total Number Of Students Enrolled In School
MEMORIAL HIGH SCHOOL 7-12	48560	462
CAMPBELL ELEMENTARY K-6	16085613	563
Northeast Ohio Impact Academy	17023010	38

School	Student Count	Budget Calc. (\$167/student)	Budget Per Site Basis
Memorial High School	462	\$77,154.00	\$77,154.00
Campbell Elementary	563	\$94,021.00	\$94,021.00
Northeast Ohio Impact Academy	38	\$6,346.00	\$25,000.00
Totals:		\$177,521.00	\$196,175.00
Difference:			\$18,654.00

# What Is the Application Process?



**There's an E-Rate form for everything!**

**\*Required annually!**

# Competitive Bidding

FCC Form 470

# What is competitive bidding?

- Competitive bidding is a formal process to choose the service providers who will provide your products and services
  - Describe your desired services and requirements (sufficient detail) using the FCC Form 470 and a Request for Proposal (RFP) if applicable.
  - Service providers review your documents and bid on your services.
  - Select the most cost-effective bid using the price of the eligible products and services as the primary factor.



# Requests for Proposal (RFPs)

- A Requests for Proposal (RFP) may be created to describe specific needs and circumstances in more detail.
  - USAC uses the terms “RFP” and “RFP document” generically to refer to any supplemental document that helps to describe the requested services or provides more information that is not in the FCC Form 470.

School	Minimum Bandwidth Requested	Address	Notes
ABC High School	1GB	425 Town Pkwy, Anytown, OH 43000	Address of the demarc location
ABC K-2 Primary School	500MB	235 Cherry St, Anytown, OH 43000	Point to Point requested, connecting ABC K-2 Primary School to High School
ABC Intermediate School	1GB	345 Arch St, Anytown, OH 43000	Point to Point requested, connecting ABC Intermediate School to High School
ABC Middle School	1GB	841 E Main St, Anytown, OH 43000	Point to Point requested, connecting ABC Middle School to High School

- For most types of funding requests, you are not required to issue an RFP unless your state or local procurement rules or regulations require it – however, some service requests do require RFPs.
- If you issue an RFP and/or an RFP document, these documents must be attached to the FCC Form 470 you submit in EPC.

Applicants	Service Providers
<ul style="list-style-type: none"><li>• Determine services needed, file FCC Form 470 and RFP.</li><li>• Run competitive bidding process.</li><li>• Select winning bidder, with price of eligible product and services as primary factor.</li><li>• Respond to PIA.</li><li>• File other applicant forms (FCC Forms 471, 486, 472, 500, etc.)</li><li>• Document their compliance with FCC rules on an ongoing basis.</li></ul>	<ul style="list-style-type: none"><li>• Respond to FCC Form 470 and RFPs.</li><li>• May assist with responding to PIA on technical services questions (but not competitive bidding).</li><li>• File other service provider forms (FCC Forms 473, 474, etc).</li><li>• Document their compliance with FCC rules on an ongoing basis.</li></ul>

Applicants **cannot** have a relationship with service providers that would unfairly influence the outcome of the competition.

# Competitive Bidding Requirements

- The competitive bidding process must be **open and fair**.
  - "Open" means that information shared with one bidder must be shared with all.
  - "Fair" means that bidders must be evaluated fairly and equally.
- **28-Day Waiting Period**
  - FCC Form 470 and any RFPs (if applicable) must be posted on the USAC website for a minimum of 28 days.
  - The end of the 28-day period is when you are allowed to review bids and select vendors — your allowable contract date (ACD).

# E-Rate Gift Rules

- In March, the FCC temporarily waived the E-Rate gift rule through September 30, 2020 to provide relief to schools and libraries affected by COVID-19 and make it easier for service providers to support remote learning efforts.
- The date has been extended through December 31, 2020.
- This waiver is limited to offerings made by service providers on behalf of students, teachers, or patrons while schools and libraries prepare for extended remote learning and remain fully or partially closed as a direct result of COVID-19.
- Applicants are still subject to the program rules requiring a fair and open competitive bidding process as they begin competitive bidding for funding year 2021

# Fair and Open Competition: Applicant Actions

Applicants and Service Providers **can**:

- Have pre-bidding discussions
- Discuss new product offerings.
- Teach applicants about new technologies.
- Note, however, that all parties must be privy to the same information during the competitive bidding process.

# Competitive Bidding: Guiding Principles

- In your FCC Form 470 and if attaching an RFP, you must describe the desired products and services you need with sufficient specificity for service providers to be able to submit responsive bids.
  - **Services requested on the FCC Form 470 and RFP MUST match.**
  - No generic descriptions (e.g., all Digital Transmission Services).
  - No laundry lists of products and services.
- All potential bidders must have access to your FCC Form 470, and RFP documents. The process must be open and fair.
- You must be prepared to accept bids and answer questions.

# Competitive Bidding: Imposing Restrictions

- Cannot list specific make and model of services sought without also considering equivalent products and/or services.
  - “XYZ manufacturer's router model 345J **or equivalent**”
  - FCC Form 470 will ensure compliance but double-check your RFP to make sure you’ve included the “**or equivalent**” language.
- Applicants may set some eligible service requirements.
  - Applicants may require service providers to provide services that are compatible with one kind of system over another (e.g. Brand X compatible).
- **Disqualification criteria must be spelled out in FCC Form 470 and/or RFP and be available to all potential bidders.**

# Procurement Requirements

## Sample Disqualifying Factor:

- All hardware quoted must be compatible with existing infrastructure
- Hardware quoted must be new with manufacturer's warranty. Quotes for used or refurbished equipment will not be considered.
- Vendor must have a SPIN at the time of awarding contract
- Cabling vendors must be bonded/insured
- Vendor must give assurances that all quoted prices will be honored at time of purchase
- All vendors must conduct a walk-through of each location if bidding on the cabling project and all quotes must include all cabling material, necessary components, and installation costs to complete the project
- Vendor must demonstrate they are a valid reseller of products quoted
- In-state (or local) vendors preferred
- Previous experience with vendor preferred
- Vendor must put in writing their willing to give discounted bills
- Must demonstrate ability to meet installation timeline
- **Deadline for vendor proposals is 9:00 am Eastern, 29 days from the date this Form 470 is posted. We reserve the right to reject late-submitted proposals.**

- **You are not required to file a Form 470** if services are part of a multi-year contract that is still in effect:
  - Multi-year contract was signed in prior year and the original contract term has not completed;
  - Multi-year contract with contract extensions was signed in prior year, and the contract extensions have not yet expired.
  - In both cases, the contract terms and services are supported by the original FCC Form 470.
- **NOTE: You still need to file a new FCC Form 471 requesting E-Rate support each funding year.**

# Special Note!!

## If you upgraded your bandwidth as part of the FY2020 2<sup>nd</sup> Form 471 Window:

- You must competitively bid the additional bandwidth for **FY2021** if either of these occur:
  - The increase in bandwidth is beyond what was in the original Form 470 scope **and/or**
  - The increase required a new contract to be awarded (whether you changed service providers or not)
- If the increase required a new **multi-year** contract, you may use the new contract as a bid response when you file the Form 470 for FY2021.
  - You will need to compare this cost to other bids received. If you continue with this contract, put something in writing stating you've chosen to stay with this contract. This date will become your new contract award date.

- **You are not required to file a Form 470** when services qualify for low cost, high speed internet access:
  - The services are not being provided under a multi-year contract.
  - The services qualify for low-cost, high speed internet access.
  - It is commercially available, business class internet access.
  - It offers minimum speeds of 100 Mbps download / 10 Mbps upload.
  - The pre-discount price — including any one-time charges — is \$3,600 or less annually per entity (school or library).
  - It provides basic conduit access to the internet at those required minimum speeds.

# What to do when you get no bids

- Reach out to additional potential bidders and ask them to bid.
- If you receive only one bid, *and it is cost-effective*, you may accept it.
  - Document your decision with a memo or email for your records.
- If you did not receive any bids, you can solicit bids.
  - Reach out to vendors in the area.
  - Ask your current service provider to submit a bid or to send you an email that they are willing to continue to provide service at your current level and cost.

# Evaluating Bids

- To evaluate incoming bids, create a bid evaluation matrix.
- Develop evaluation criteria or factors to assess the bids.
- Assign each evaluation factor a point value or percentage.
  - The price of the **eligible** products and services must be the most heavily weighted factor — the “primary factor” — in your evaluation.
- The vendor who receives the most overall points or the highest percentage is the winner.
- **Again, disqualification of bid(s) must be tied to the requirements clearly listed on the FCC Form 470 and/or RFP.**

# Bid Evaluation Sample

- Evaluate your bids using a matrix with your bid factors and points.

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the <b>ELIGIBLE</b> products and services	50	20	50	40
Prior experience w/vendor	20	20	0	20
Product compatible with existing infrastructure	15	10	5	15
Flexible Invoicing: FCC Forms 472 or 474	10	0	10	10
Local or in-state vendor	5	5	0	5
<b>TOTAL</b>	<b>100</b>	<b>55</b>	<b>65</b>	<b>90</b>

- Bidder 3 wins because they received the most points.

# Contracts and Legally Binding Agreement

- Applicants must have a signed contract or *other legally binding agreement* in place prior to submitting their FCC Forms 471 to USAC.
- Applicant must not sign a contract before the **Allowable Contract Award Date (ACD)**.
- Signed contracts constitute the best evidence that a legally binding agreement exists.
- Voluntary contract extensions are allowable only when the option is stated in the original provisions of the contract.
- Applicant must rebid the services (i.e., file a new FCC Form 470) if contract extensions are not stated in the contract or RFP.
- Applicants must create a contract record in their EPC profile for each contract and can upload a copy of the contract.

# Another E-Rate Rule: Duplicative Services

- **E-Rate cannot fund duplicative services.**
- Duplicative services are services that provide the same functionality for the same population in the same location during the same period of time.
- Backup services – services sought to reduce reliance on any single service provider's network during an outage – are considered duplicative.
- Services that provide necessary bandwidth requirements, such as multiple circuits (lines) when appropriate for the population served and the services to be received, may not be considered duplicative. However, the applicant must still evaluate and choose the most cost-effective option from the bids received.

# To Recap...After the 28-Day Waiting Period, You Can...

**1.**

**Evaluate the bids you received**

- Use a bid evaluation matrix

**2.**

**Choose your service provider(s)**

- Notify the winner

**3.**

**Sign a contract or legally binding agreement**

- Upload the contract into EPC

**4.**

**File the next form (FCC Form 471)**

# Requesting Funding (FCC Form **471** )

# Requesting Funding: FCC Form 471 Application Window

- You can file the Form 471 after you have completed your competitive bidding process, chosen your vendors, and signed contracts (if appropriate).
  - You also must wait for the filing window to open.
- The filing window Form 471 generally opens in mid-January and closes in mid-March.

# Requesting Funding: FCC Form 471

Your FCC Form 471 application is broken into the following parts:

- Basic information – information about the applicant and contact information.
- Discount information – student counts, urban/rural status of your schools or libraries.
- Funding Request Numbers (FRNs) – for each funding request, you provide:
  - The service provider name and the Service Provider Identification Number (SPIN).
  - Information about the contracts or month-to-month/tariff agreements.
  - The eligible schools/libraries that will receive the services.
  - Your chosen services and their costs.
- Certifications to indicate your compliance with program rules.

# Program Integrity Assurance (PIA)

- After submitting FCC Form 471, USAC reviews your application.
- Program Integrity Assurance (PIA) is the group at USAC that reviews your application and makes decisions on funding.
- Your PIA reviewer may contact you to:
  - Verify eligibility of one or more of your schools or libraries or your student counts.
  - Verify eligibility of the requested services.
  - Ask for additional documentation on a variety of topics related to your funding requests.

# Responding to your PIA Reviewer

- You have 15 days to respond to PIA questions.
  - You can request one seven-day extension.
- If you need help understanding the PIA questions, ask your reviewer for help.
- To answer inquiries, ask for extensions, or find your reviewer's contact info:
  - Navigate to the FCC Form 471 in EPC.
  - Choose "Related Actions," then choose "Respond to Inquiries."



# Funding Commitment

- When PIA's review is complete, you and your service provider receive a notification called the Funding Commitment Decision Letter (FCDL).
- Your FCDL will include USAC's decisions on your funding requests — commitments, modifications, and/or denials – and next steps.
- FCDLs will be emailed to the contact person on the FCC Form 471 and will also be available in the Notifications section of your EPC landing page.
- If you disagree with one or more of USAC's decisions, you or your service provider can [file an appeal](#).
  - The deadline to appeal is 60 days from the date the FCDL is issued.
  - Appeal with USAC first, unless you're requested a waiver of rules.
  - If the appeal is denied by USAC, you may then appeal with the FCC

# Document Retention

- You must keep all documentation for 10 years from the last date to receive service.
  - For multi-year contracts this means 10 years from the contract expiration date.
- Retain receipt and delivery records relating to pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to your applications.
- For example, for recurring internet access service for FY2021, both the applicant and the service provider must retain all records until at least June 30, 2032.



# FCC Form 486

Applicants file the FCC Form 486 after receiving a funding letter to:

- Notify USAC that **services have started** for the Funding Request Numbers (FRNs) listed on the FCC Form 471.

**Also, when applying for Internet Access or any service under Category 2, you must be CIPA compliant.**

Filing the FCC Form 486:

- Reports the status of compliance of the entities on those FRNs with the **Children's Internet Protection Act (CIPA)**.

# CHILDREN'S INTERNET PROTECTION ACT (CIPA) COMPLIANCE

- CIPA is a law with specific requirements for entities that receive E-Rate discounts on Internet access.
- CIPA compliance includes:
  - Internet safety policy
  - Technology protection measure/filter
  - Holding one hearing or meeting (with reasonable public notice) on the Internet safety policy
  - (For schools only) education for students on Internet safety.

# Training Resources

The curriculum or method used to provide CIPA training is a local decision.

## Topics to cover:

- Cyberbullying awareness and response, and
- Appropriate online behavior, including interacting with other individuals on social networking sites

## A couple of free resources:

- **Netsmartz:** <https://www.missingkids.org/netsmartz/resources>
- **Commonsense Media:**  
<https://www.commonsense.org/education/>

- What is my Service Start Date (SSD)?
  - The first day of the funding year if services start on or before July 1.
  - Any day after July 1, but before June 30 of the funding year that services were actually started. For example:
    - For installations that started on May 25 before the funding year, the SSD is July 1 of the funding year.
    - For services starting August 7 of the funding year, the SSD is August 7 of the funding year.

# When do I file the FCC Form 486 ?

- After USAC issues the Funding Commitment Decision Letter (FCDL) with a positive funding commitment.
- The FCC Form 486 MUST be certified no later than 120 days after the **Service Start Date reported on the FCC Form 486** or 120 days after the date of the **FCDL**, whichever is later.

## What if I file the FCC Form 486 late?

If you miss this deadline, USAC will adjust your service start date to a date 120 days before the date you certified your form, and your funding commitment may be reduced to reflect the reduction in service time.

# FCC Form 486 Notifications

- After submitting the FCC Form 486, you and your service provider will receive two notifications.
  - The first notification confirms the form was certified.
  - The second notification is your FCC Form 486 Notification Letter, indicating that your form completed review and informing you of the decision.
- After USAC has approved your FCC Form 486 and services have started, you or your service provider may begin invoicing USAC for the discount amount of the costs of the approved products or services.

# FCC Forms **486** Urgent Reminder Notification

- An urgent reminder letter is issued to applicants that appear to have missed the deadline to certify based on the service start date reported on the FCC Form 471.
  - The letter is delivered in the EPC News Feed.
  - Applicants have 15 days from the date of the letter to submit and certify the FCC Form 486 without penalty (if the service start date reported on the FCC Form 471 was the actual service start date).

**Invoicing: Form 472 (BEAR)**

**or Form 474 (SPI)**

# Invoicing Methods

There are two methods to invoice USAC:

1. Filed by Applicant **when invoices are paid in full**

- **FCC Form 472**
  - a.k.a. Billed Entity Applicant Reimbursement (**BEAR**) Form
- Filed online using legacy system (access in OnePortal)

2. Filed by Service Provider **when invoiced for non-discount portion only**

- **FCC Form 474**
  - a.k.a. Service Provider Invoice (**SPI**) Form
- Filed online or electronically

# Preparing for Invoicing

Reimbursement may take place providing:

- The applicant and service provider **receive an FCDL** with a positive commitment.
- The applicant **certifies an FCC Form 486** and establishes the actual service start date for FRN(s).
- USAC reviews and approves the FCC Form 486.
- The service provider **certifies an FCC Form 473** (Service Provider Annual Certification or SPAC Form) for each SPIN that will be featured on an invoice for that funding year.

Invoice method (BEAR or SPI) is the **applicant's choice**.

- Service providers and applicants should have this discussion as early as possible – ideally, before the applicant certifies the FCC Form 471.
- Once the invoice method is set for a Funding Request Number (FRN), it cannot be changed for the funding year.
  - The invoice method is FRN-specific.

# Before You Begin– Applicants Filing BEAR Forms

- Be sure you have an approved Personal Identification Number (PIN) and an approved FCC Form 498 if you intend to file BEAR Forms.
- If you do not have a PIN, contact USAC’s Client Service Bureau for assistance at 888-203-8100.



# Applicant FCC Form 498

## Overview

- Applicants that choose to file an FCC Form 472 (BEAR) must file an **FCC Form 498** in EPC before they can receive payments, as this form collects banking information.
- After submitting the 498, you must upload a copy of a voided check for account verification a:  
<https://efile.universalservice.org/ServiceProviderManagement/V1/BankValidation> .
- USAC's 498 Team must review and approve both the form and the banking documentation before the form can be approved.
- **If the banking information changes later , you will need to modify your existing 498, do not file a new one!**
- Applicants who **only** use the SPI method do not have to file the FCC Form 498.

# When to File the BEAR or SPI

- The invoice deadline is:
  - 120 days after the last date to receive service or 120 days after the date of the FCC Form 486 Notification Letter, whichever is later.
  - In a “normal” year, the invoice deadline for FY2019 **recurring services** would be October 28, 2020.
  - And, the deadline for FY2019 **non-recurring** services would be January 28, 2021. **However, the FCC has extended these dates due to COVID-19!**
- File after services are delivered and paid.
- You can choose the frequency to file (annually, semi-annually, quarterly, etc.).
- Invoice Deadline Extensions
  - You can request and receive one 120-day extension of the invoice deadline.
  - The request must be submitted on or before the original invoice deadline.

# Extended FY2019 Deadlines

- The FCC **FY2019** extended deadlines are:

<b>Service Type/Form</b>	<b>Example of Service</b>	<b>"Normal" Date</b>	<b>"COVID" Date</b>
BEAR/SPI - Cat 1 Recurring Service	Cost paid for Lit Fiber/ISP service	10/28/2020	<b>2/25/2021</b>
BEAR/SPI - Cat 2 Non-Recurring Service	Cost paid for Internal Connections Hardware	1/28/2021	<b>1/28/2022</b>

- If needed, you can ask for the one-time 120-day extension to push the date out further.



# Deadline Recap

- **FCC Form 470**

- Post to the USAC website no later than 28 days before the last day of the FCC Form 471 filing window.

- **Admin Window**

- Opened October 19<sup>th</sup> – closes several days prior to the opening of the Form 471 window

- **FCC Form 471**

- File only during the application filing window (exact dates vary each year) but should be similar to last year.
- File by 11:59 PM EDT on the last day of the filing window.

- **FCC Form 486**

- Deadline is 120 days after service start date or 120 days after the date of the FCDL — whichever is later.

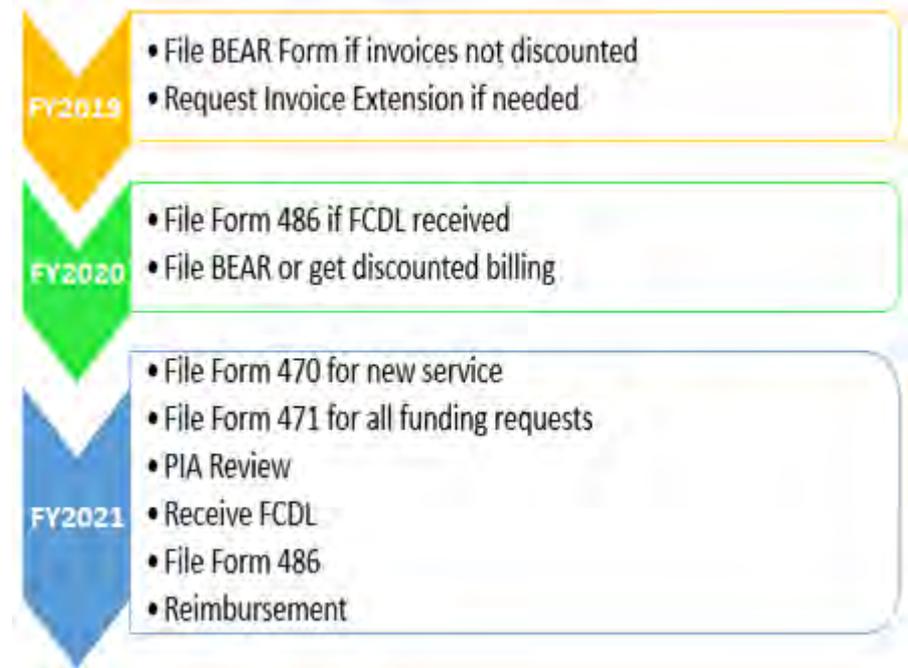
# Funding Cycle

With E-Rate, it's typical to be dealing with up to 3 funding years at any given time

## Annual Funding Cycle



## To Do List by Funding Year



# Timeline Checklist

## E-Rate FY2021-22 Timeline Checklist

<b>Application Steps</b> <i>(Initial box when item completed)</i>	<b>Completed/ Filed</b> <i>(applicant responsibility)</i>	<b>Notification Received</b> <i>(Posted in EPC Portal)</i>
<b>Form 470</b> (wait minimum <b>28</b> days <u>after</u> filing before awarding contracts or filing the Form 471!!)		
<b>*Allowable Contract Date</b> _____		
<b>Last Day to file a Form 470</b> –		
<b>Admin Window Deadline</b> –		
<b>Form 471</b> <b>Window opens:</b> <b>Window closes:</b>		
Form 471 Receipt Acknowledgement Letter (RAL) located in EPC portal – Check app for errors!		
<b>Funding Commitment Decision Letter (FCDL)</b> located in EPC portal – Read carefully		
<b>*Appeal all denials</b> (60 days from FCDL)		
<b>Form 486</b> (120 days from <u>start</u> of service or receipt of FCDL, whichever is later)		
Discounts on Bills (Inform service provider)		
<b>Form 498</b> – Allows direct payment to the applicant - Must be filed and processed in order to file BEAR form – <b>*Note:</b> this is a single submission. You do not file annually, as with other forms. <b>If corrections are needed, modify existing form in EPC.</b>		
<b>Form 472 BEAR</b> (reimbursement – must be filed <b>120</b> days <u>after</u> end of service if bills were not discounted) <b>File in legacy system</b>		
BEAR Reimbursement Payment Received		

For a copy of the Timeline Checklist, go to my website at <https://www.ohio-k12.help/erate/e-rate-resources/>

# Quick Way to Get the Information Needed

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



Applicant: ABC Local School District  
Billed Entity: 129000

FY	Req. FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2	Total Committed	Total Disbursed	Remaining Balance	Util. %
<a href="#">2020</a>	6	5	5	\$83,369.71	\$58,018.46	\$25,351.25	\$83,369.71	\$0.00	\$83,369.71	0%
<a href="#">2019</a>	5	5	5	\$55,292.86	\$48,352.46	\$6,940.40	\$55,292.86	\$47,574.00	\$7,718.86	86%
<a href="#">2018</a>	8	8	8	\$30,165.38	\$29,318.25	\$847.13	\$30,165.38	\$29,261.02	\$904.36	97%
<a href="#">2017</a>	6	6	6	\$31,363.19	\$31,363.19	\$0.00	\$31,363.19	\$31,207.66	\$155.53	100%
<a href="#">2016</a>	8	8	8	\$43,379.00	\$34,466.11	\$7,511.79	\$41,977.90	\$39,564.37	\$2,413.53	94%
<a href="#">2015</a>	7	7	7	\$30,244.77	\$29,098.39	\$0.00	\$29,098.39	\$27,924.26	\$1,174.13	96%
<a href="#">2014</a>	6	6	6	\$44,217.09	\$44,217.09	\$0.00	\$44,217.09	\$31,364.89	\$12,852.20	71%

471	FRN	SPIN	Service Provider	Service*
201016217	<a href="#">2099021355</a>	143001654	The Chillicothe Telephone Company	IA
201016217	<a href="#">2099021363</a>	143001654	The Chillicothe Telephone Company	IA
201031988	<a href="#">2099054954</a>	143005588	CDW Government LLC	IC
201020505	<a href="#">2099050229</a>	143001654	The Chillicothe Telephone Company	IA

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

# Eligible Services



# Eligible Services: Category One

Per the FY 2020 ESL, these consist of the services needed to support broadband connectivity to eligible schools and libraries.

These services are used to connect locations to the Internet and provide basic conduit access to the Internet.

- Data Transmission Services
- Internet Access

# Eligible Services: Category One Examples

- Broadband over Power Lines
- Cable Modem
- DS-1, DS-2, DS-3, DS-4
- Ethernet
- Leased Dark Fiber (including dark fiber indefeasible rights of use (IRUs) for a set term)
- Self-Provisioned Network
- Satellite Service
- Microwave
- Multi-Protocol Label Switching (MPLS)
- Cellular Data Plan (Hotspot)
- **Very limited eligibility!! Such as for a library's bookmobile or kiosk.**

# Category One: Eligible Fiber Services

- The FCC's *2014 Second E-Rate Order* provided additional flexibility to schools and libraries seeking to access affordable high-speed broadband connections.
- The Order amended the E-Rate program's eligible services list to equalize the treatment of lit and dark fiber and made special construction charges beyond the applicant's property line and modulating electronics to light dark fiber eligible for Category One support.
- When cost-effective, the Order also allows for funding of applicant-owned broadband networks.

# Category One: Eligible Fiber Services

## Leased Lit Fiber

A fiber-based broadband service where the service provider owns and manages the network, and the E-Rate applicant pays a recurring fee to have data transported over the network.

## Leased Dark Fiber

The E-Rate applicant leases capacity (i.e., a specific number of strands) on a service provider-owned and maintained fiber network. The applicant pays separately for modulating equipment to light the fiber in order to transmit data over that fiber.

## Self-Provisioned Networks\*

Complete applicant ownership of a high-speed broadband network. The applicant hires a vendor to construct the network or a portion of the network, and thereafter owns and maintains that network or portion of the network, including all of the fiber strands and conduit.

**\*Note:** Although included as a fiber option, applicants may seek support for self-provisioned networks using technologies other than fiber, such as cable or microwave.

# Category One: Eligible Fiber Services

Applicants may request E-Rate support for the following charges (by type of service):

## Leased Lit Fiber

- Monthly recurring charges
- Special construction charges
- Basic installation charges

## Leased Dark Fiber

- Recurring dark fiber lease or IRU payments
- Special construction charges
- Network equipment
- Maintenance and operations charges
- Basic installation charges

## Self-Provisioned Networks

- Special construction charges
- Network equipment
- Maintenance and operations charges

# Initiating a Request for Bids: FCC Form 470 Drop Downs

	If you want...	Select this 470 Drop Down Option	RFP Required?
Broadband Transport	Leased Lit Fiber Connectivity	Leased Lit Fiber (with or without Internet Access) <i>Must explain service request in narrative textbox</i>	No
	Leased Dark Fiber Connectivity	Leased Dark Fiber and Leased Lit Fiber <i>Must seek bids for both services, then evaluate all proposals. Also must state minimum and maximum capacity needs in the narrative text box plus # of leased lit fiber circuits being requested.</i>	<b>YES</b>
	Self Provisioned Fiber (applicant owned)	Self-Provisioned Network (Applicant Owned and Operated Network) and Services Provided Over Third-Party Networks <i>Must seek bids for all services, then evaluate all proposals.</i>	<b>YES</b>
	Non-Fiber Connectivity (coaxial cable, microwave, copper, etc.)	Transport Only – No ISP Service (Non-Fiber)	No
	Category 1 Network Equipment	Network Equipment	<b>YES</b>
	Maintenance and Operations	Maintenance and Operations	<b>YES</b>
Internet	Internet Access with FIBER Transport	Leased Lit Fiber (with or without Internet Access) <i>Must provide Internet bandwidth amounts in narrative text box.</i>	No
	Internet Access with NON-FIBER transport (for example, cable modem, DSL)	Internet Access and Transport Bundled <i>Cannot specify which transport type you're seeking.</i>	No
	Commodity Internet Access (no transport)	Internet Access: ISP Service Only	No

# Eligible Services: Category Two

- **Internal Connections (IC)** - The equipment and services used to bring broadband into, and provide it throughout, schools and libraries (e.g., routers, access points, switches, cabling, license).
- **Managed Internal Broadband Services (MIBS)** – Third-party operation, management, and monitoring of eligible broadband internal connections (owned or leased equipment).
- **Basic Maintenance of Eligible Broadband Internal Connections (BMIC)** – Basic maintenance and technical support appropriate to maintain reliable operation for eligible broadband internal connections.

# Internal Connections

- Wireless Access Points/Controllers
- Structured Cabling
- Caching Servers
  - Only eligible servers
- Firewalls
  - No ancillary modules/functions are eligible, like anti-spam, anti-virus, etc.
- Network Routers & Switches
- Racks and UPSs
  - That support eligible equipment only
  - Network cards aren't eligible
- Equipment licenses
  - Multi-year licenses can be requested in first year
- Cloud-based functionality of this 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:**
  - Storage Devices
  - Voice/Video Components
  - End User Devices

# Eligible Services - Category Two: Licenses

## Licenses:

- Classified as Internal Connections under Category Two.
- Licenses that are right-to-use (necessary for the functionality of the eligible internal connection device) are fully eligible in the requested Funding Year.
- Can be requested fully as a one-time charge.
- **If the license includes some level of maintenance, you must also request them under Basic Maintenance.**

# Category 2 Cost Allocations

Depending on the functionality of some equipment or software, the product may not be fully eligible for E-Rate funding, requiring a percentage of the cost to be deducted.

- Below are links to manufacturer’s websites or documents they have provided, publishing their cost allocations.

- [Cisco/Meraki](#) 
- [Fortinet](#)
- [HP Aruba](#)
- [Juniper Networks](#)
- [Palo Alto Networks](#) (click on “Palo Alto Network Product Eligibility Guide” to download PDF)
- [Sophos](#)

Search Results			
SKU	Description	Eligible	Notes
C9410R-96U-BNDL-E	Catalyst 9400 Series 10 slot,Sup, 2xC9400-LC-48U, DNA-E LIC	100%	
C9410R-96U-BNDL-A	Catalyst 9400 Series 10 slot,Sup, 2xC9400-LC-48U, DNA-A LIC	Cost Allocate (79%)	

# Managed Internal Broadband Services (MIBS)

- Covers the operation, management, or monitoring of a LAN
- 2 Options:
  - Paying an outside vendor to own/maintain the equipment
  - Paying an outside vendor to maintain school-owned equipment
- Subject to the C2 budget caps

# Basic Maintenance of Internal Connections (BMIC)

- Limited eligibility
- Multi-year contracts must be amortized
  - Cannot apply for full cost of multi-year BMIC contract in Year 1
- Can only be for services/work performed from 7/1/2020 – 6/30/2021
- Basic tech support, configuration changes, etc. is 100% eligible
- Repair of equipment, cable maintenance, etc. is conditionally eligible
  - E-Rate will commit based on amount of contract
  - BUT.... Will only reimburse for time/parts used
  - C2 budget takes “hit” based on full commitment, not funds “used”

# Installation Periods



# Early Installation – Category One

## What is early installation?

- Some **Category One** non-recurring components can be installed as early as January 1, prior to the July 1 start of the funding year, providing:
  - The service provider has selected pursuant to an FCC Form 470 posting;
  - Construction begins after selection of the service provider;
  - The Category One recurring service depends on the installation of the infrastructure



## What is early installation?

–The **Category One** recurring service's actual start date is on or after July 1 of the funding year.

–**NOTE:** The invoices (BEAR or SPI) cannot be dated before July 1 of the funding year.

**Additional Reminder:** Funding is **not** guaranteed until USAC makes a commitment.

# Category Two Non-recurring Services (Internal Connections)

- Installation of **Category Two** non-recurring services may begin on April 1 (90 days) prior to the July 1 start of the funding year.

**But, again:** Funding is **not** guaranteed until USAC makes a commitment.

- The **service delivery deadline** for the implementation for **Category Two** non-recurring services is September 30 (90 days) following the end of the funding year.



# Additional FY2019 Deadline Extensions

- The FCC **FY2019** extended deadlines are:

Service Type/Form	Example of Service	"Normal" Date	"COVID" Date
Cat 1 Special Construction	Install of Dark or Self Provision Fiber	6/30/2020	<b>6/30/2021</b>
Cat 2 Non-Recurring Service Delivery	Purchase of Router, switches, AP, etc.	9/30/2020	<b>9/30/2021</b>



# USAC's One Portal



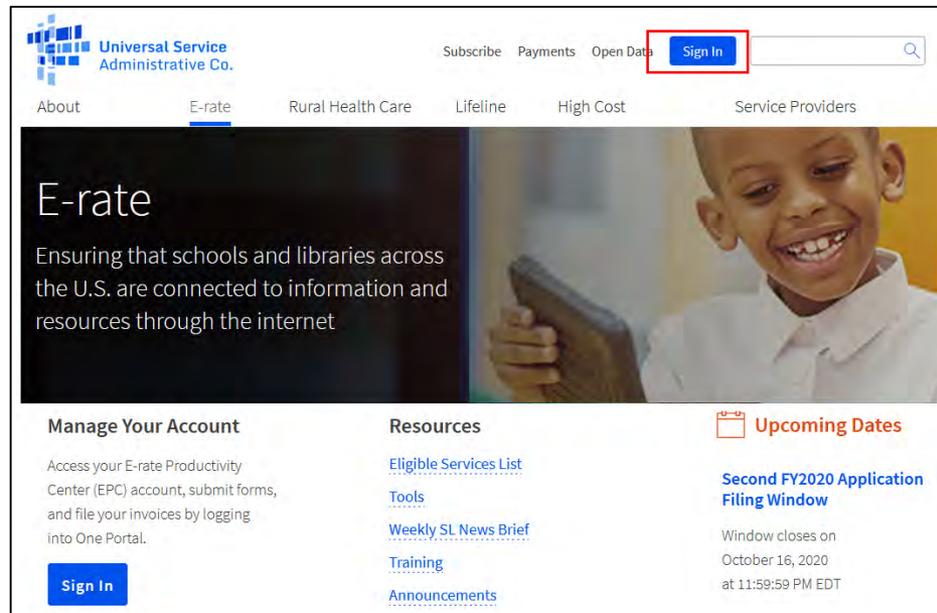
# USAC's One Portal

USAC has added multifactor authentication (MFA) to increase the security of the Universal Service Fund (USF) applications.

We now log into One Portal to access the E-Rate Productivity Center (EPC) and the FCC Form 472 (BEAR).

- You will see both options if you have a PIN for the BEAR

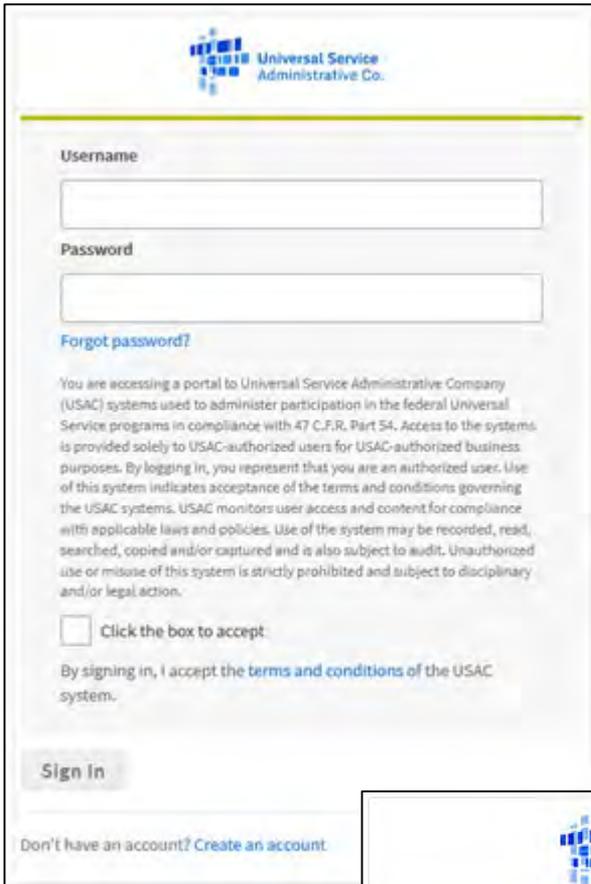
To access, go to <https://www.usac.org/e-rate/> and click on “Sign In” and then “Continue”.



The screenshot shows the USAC E-rate portal homepage. At the top, the Universal Service Administrative Co. logo is on the left, and navigation links for 'Subscribe', 'Payments', 'Open Data', and 'Sign In' are on the right. The 'Sign In' button is highlighted with a red box. Below the navigation, there are links for 'About', 'E-rate', 'Rural Health Care', 'Lifeline', 'High Cost', and 'Service Providers'. The main content area features a large 'E-rate' header with the text 'Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet'. Below this, there are three columns of content: 'Manage Your Account' with a 'Sign In' button, 'Resources' with links for 'Eligible Services List', 'Tools', 'Weekly SL News Brief', 'Training', and 'Announcements', and 'Upcoming Dates' with a 'Second FY2020 Application Filing Window' section that states 'Window closes on October 16, 2020 at 11:59:59 PM EDT'.

# Logging Into One Portal

- Enter your email address as username and password. Click on “Forgot Password” if you need to reset.
- Initially you request the MFA code by email. After logging in for the first time, you may add “Text Message” as an option. Don’t forget to click on **“Send Email”** or **“Send Passcode”** 😊.
- You will receive email from noreply@usac.org. The code is active for 10 minutes



Universal Service Administrative Co.

Username

Password

[Forgot password?](#)

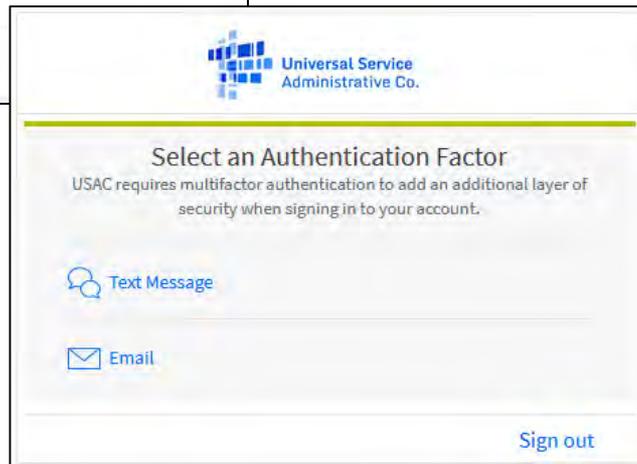
You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the systems is provided solely to USAC-authorized users for USAC-authorized business purposes. 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 and/or legal action.

Click the box to accept

By signing in, I accept the [terms and conditions](#) of the USAC system.

[Sign In](#)

[Don't have an account? Create an account.](#)



Universal Service Administrative Co.

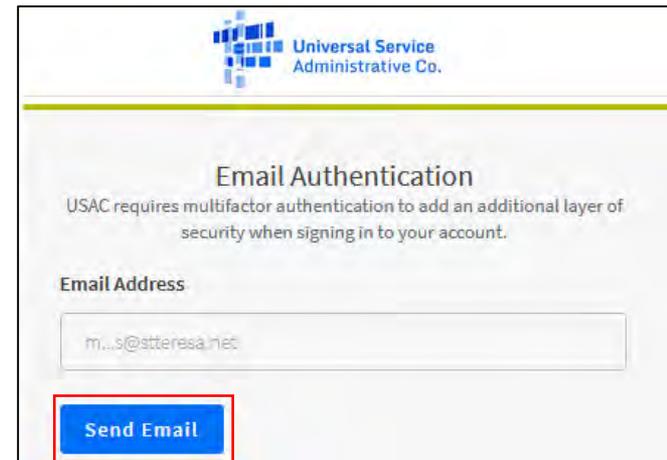
### Select an Authentication Factor

USAC requires multifactor authentication to add an additional layer of security when signing in to your account.

[Text Message](#)

[Email](#)

[Sign out](#)



Universal Service Administrative Co.

### Email Authentication

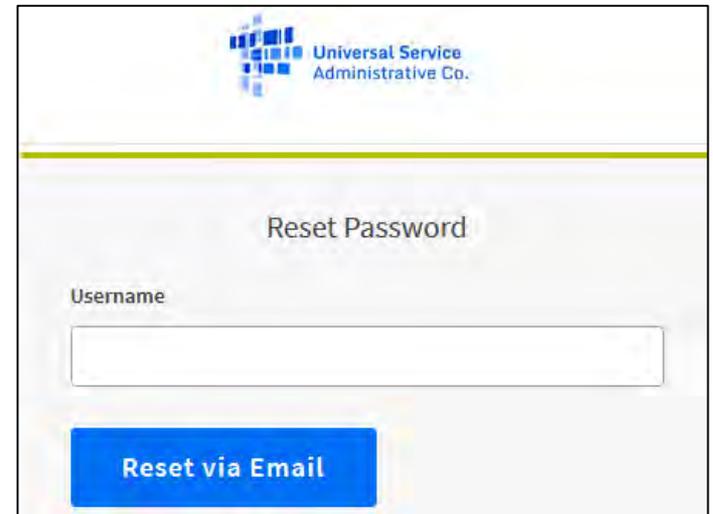
USAC requires multifactor authentication to add an additional layer of security when signing in to your account.

Email Address

[Send Email](#)

# Logging Into One Portal

- If you're resetting your password, you'll receive email from **noreply@usac.org**, subject "USAC Password Reset".
  - The link is only active for 15 minutes. If it times out, go back through the steps again.
- Tips for Creating your Password
  - Be at least eight characters
  - Has not been used in the previous four passwords
  - Contains at least one numeral (0 through 9)
  - Contains at least one special character (such as !, \$, #, %)
  - Contains at least one uppercase letter (A through Z)
  - Contains at least one lowercase letter (a through z)



The screenshot shows the 'Reset Password' form for the Universal Service Administrative Co. (USAC). At the top right, there is a logo consisting of a grid of blue squares and the text 'Universal Service Administrative Co.'. Below the logo, the title 'Reset Password' is centered. Underneath the title, there is a label 'Username' followed by a white text input field. At the bottom of the form, there is a prominent blue button with the white text 'Reset via Email'.

# USAC's One Portal

- After entering the one-time verification code, you may see both EPC and BEAR options, or you're taken into EPC.
- Remember, in order to see the BEAR, you need a PIN that was issued under the same email address used for EPC.

Universal Service Administrative Co. [Sign Out](#)

Dashboard lorrie.germann@gmail.com

**Upcoming Dates**

10/16 2020 **Second FY2020 Application Filing Window Closes**

**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.

FCC Form 472 (BEAR) - Applicants file an FCC Form 472 (Billed Entity Applicant Reimbursement (BEAR) Form) to request reimbursement from USAC for the discount amount of the eligible products or services that the applicant has received and paid for in full.

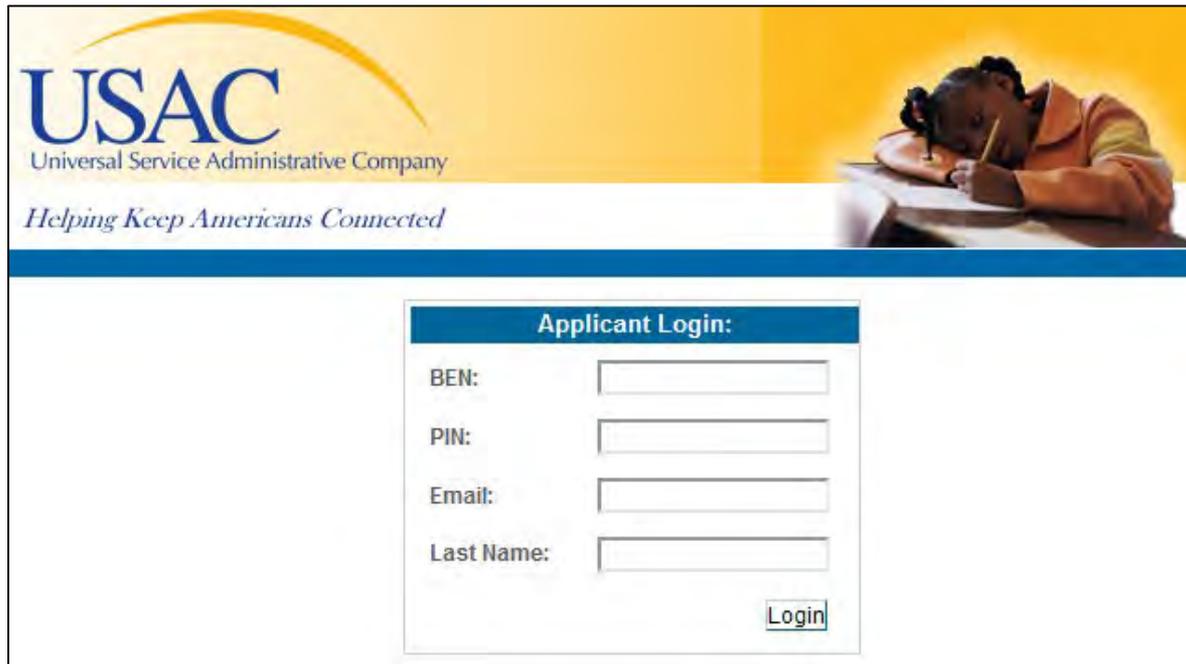
**Help?**

**Send us a message**  
[Click here](#)

**Call us**  
(888) 641-8722

# USAC's One Portal

- If you choose the BEAR option, you're taken to the legacy BEAR site and will have to login there with your PIN.



The image shows a screenshot of the USAC (Universal Service Administrative Company) website. The header features the USAC logo and the tagline "Helping Keep Americans Connected". Below the header is a blue horizontal bar. The main content area contains an "Applicant Login" form with the following fields: BEN, PIN, Email, and Last Name. Each field has a corresponding input box. A "Login" button is located at the bottom right of the form. The background of the page features a photograph of a young girl writing at a desk.

- Note: when you log out of the BEAR site, it also logs you out of One Portal.

# E-Rate Productivity Center (EPC)

- What is EPC?
  - Account and application management portal
  - Manage program processes, receive notifications, and contact customer service.
- What can you do in EPC?
  - File most program forms
  - Maintain a list of your related entities
  - Update entity information
  - **Account Administrators** can add users on their organization's account and assign them rights (permissions) to file program forms. While you can have multiple users in EPC, you are limited to one admin account.

News Tasks (3) Records Reports Actions

**Menu Bar**

My Applicant Landing Page

**Quick Links**

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

**Universal Service Administrative Co.**

Welcome, School District 10997!

**Pending Inquiries**

Type: --Select a Type-- Application/Request: --Enter an Application/Request ID--

Funding Year: --Select a Funding Year--

APPLY FILTERS CLEAR FILTERS

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	Extn.	Status
No items available								

**Notifications**

Notification Type: --Please select a value--

Funding Year: --Select a Funding Year--

Status:  All  Generated  Not Generated

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	
School 2 In District 10997	6911	Rockville	MD	
School 3 In District 10997	6912	Rockville	MD	20850

**My Entities**

**Customer Service Cases**

Case ID	Topic	Nickname	Status	Date Created
No items available				

**FCC Forms and Post-Commitment Requests**

FCC Forms  Post-Commitment Requests

Form Type: FCC Form 470

Funding Year: --Select a Funding Year--

Status:  All  Incomplete  Certified

Nickname	Application Number	Funding Year	Status
No items available			

**Quick Links**

**PIA Inquiries**

**Notification Letters**

**My Entities**

**Copies of Forms**

# EPC Entity Profile – Account Administrator

News Tasks (3) Records Reports Actions Appian

## My Applicant Landing Page

Training  
Universal Service Administrative Co.

Welcome, School District 10997!

**Pending Inquiries**

Type --Select a Type-- Application/Request --Enter an Application/Request ID or Nickname--  
Funding Year --Select a Funding Year--

APPLY FILTERS CLEAR FILTERS

Pending COMAD Inquiries are not included.

Application/Request Number	Type	Nickname	Inquiry Name	Outreach Type	Date Sent	Due Date	↑ Extn.	Status
No items available								

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

If logging in as the Account Administrator, you will see the options to **Manage Users**. If it's missing, you do not have admin rights.

# EPC Entity Profile – Full Rights User View

The screenshot shows a web application interface with a blue header bar containing navigation tabs: News, Tasks (3), Records, Reports, and Actions. A user profile icon and the name 'Applan' are visible in the top right corner. The main content area is titled 'My Applicant Landing Page' and features the logo for 'Universal Service Administrative Co.' with the word 'Training' above it. A welcome message reads 'Welcome, School District 10997!'. Below this is a 'Pending Inquiries' section with two dropdown menus for 'Type' and 'Funding Year', and a text input field for 'Application/Request'. A horizontal menu of links is located at the top right of the main content area, with 'Manage Organizations' highlighted by a red box. The links include: Funding Request Report, FCC Form 470, FCC Form 471, FCC Form 486, Appeal, IDD Extension, FCC Form 500, SPIN Change, Service Substitution, Manage Organizations, USAC Website, and Contact Us. At the bottom right of the main content area are two buttons: 'APPLY FILTERS' and 'CLEAR FILTERS'.

If logging in as a Full Rights user, you will see the options to **Manage Organization**.

## My Applicant Landing Page

Training  
**Universal Service Administrative Co.**

Welcome, [School District 10997!](#)

[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](#)

### Pending Inquiries

Type:

Funding Year:

Application/Request:

### Notifications

Notification Type:

Funding Year:

Status:  All  
 Generated  
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

### My Entities

Entity	Entity Number	City	State	Zip Code
<a href="#">School District 10997</a>	10426	Rockville	MD	20850
<a href="#">School 2 in District 10997</a>	6911	Rockville	MD	20850
<a href="#">School 3 in District 10997</a>	6912	Rockville	MD	20850

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

# “Related Actions” Menu

Records Applicant Entities

## #170 - School District 18

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

Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

### Organization Details

**Name** School District 18  
**Entity Number** 170  
**FCC Registration Number** 0123456789

### Contact Information

**Physical Address** 100 Main Street  
Springfield, OH 45501  
**Mailing Address** 100 Main Street  
Springfield, OH 45501

### Account Administrator

**Name** School District 18 User 1

### General Contact

**Name** School District 18 User 1

### Applicant Attributes

**School District Sub-Type**  
 Public School District  
 Private School District  
 Charter School District  
 ESA School District

- Create a New User**  
This function allows you to create a user for your entity.
- Add or Remove Existing Users**  
This process allows user to add and remove users from an organization
- Manage User Permissions**  
This function allows you manage the permissions for one or more users.
- Manage Organization**  
This function allows you to update information about an entity or BEN.
- Modify Account Administrator**  
This process allows you to transfer the Account Administrator function to another individual.
- Create a Customer Service Case**  
This function allows you to submit a question about an E-rate form or topic. You can also submit a specific request or an attachment.
- Manage General Contact**  
This function allows you to designate the general contact for your entity.
- Manage Organization Relationships**  
Process to relate an Organization to another Organization
- Create FCC Form 470**  
This function allows you to create an FCC Form 470 for your entity.
- Create FCC Form 471**  
This function allows you to create an FCC Form 471 for your entity.
- Create FCC Form 498**  
This function allows you to create an FCC Form 498 for your entity.
- Create FCC Form 486**  
This function allows you to create an FCC Form 486 for your entity.
- Manage Contracts**  
Create, edit, and remove contracts for your organization
- Upload Entity Profile Data**  
This function allows you to bulk upload your child schools details.
- Create Appeal**  
This function allows you to submit an appeal
- Create SPIN Change Request**  
Action to initiate a SPIN change request.
- Create Service Substitution Request**  
Action to initiate a Service Substitution request.
- Create FCC Form 500**  
This function allows you to create an FCC Form 500 for your entity.
- Invoice Deadline Date Extension Request**  
Request an extension to the invoice deadline for one or more funding requests.

From the “Summary” page, you can access “Related Actions” to see an extensive list of menu options.

**Note:** to get back to Landing Page, click on “News”, and then USAC logo.

# School Detail Page

## My Landing Page



Welcome, School District 18!

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

### Notifications

Notification Type:  Status:  All  Generated  Not Generated

Funding Year:

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

## #172 - School District 18 School A

[Summary](#) [Customer Service](#) [Modifications](#) [Additional Information](#) [Category Two Budget](#) [Contracts](#) [FCC Forms](#) [News](#) [Related Actions](#)

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

### Organization Details

<b>Name</b> School District 18 School A	<b>Applicant Type</b> School
<b>Entity Number</b> 172	<b>Status</b> Active
<b>FCC Registration Number</b>	

### Contact Information

<b>Physical Address</b> 500 North Street Springfield, OH 45502	<b>Phone Number</b> 555-565-5555
<b>Mailing Address</b> 500 North Street Springfield, OH 45502	<b>Email</b> school.district18.user1@mailinator.com
	<b>Website URL</b>

# Modify An Organization - School Detail View

## Modify An Organization

<b>Name *</b> <input type="text" value="School 2 In District 10997"/>	<b>Organization Type</b> Applicant
<b>Physical Address</b>	
<b>Address Line 1 *</b> <input type="text" value="1 Main Street"/>	<b>Zip Code *</b> <input type="text" value="20850"/>
<b>Address Line 2</b> <input type="text"/>	<b>Zip Code Extension</b> <input type="text"/>
<b>City *</b> <input type="text" value="Rockville"/>	Click the button below to get standard USPS address
<b>State *</b> <input type="text" value="OH"/>	<b>County *</b> <input type="text" value="Montgomery County"/>
	Please ensure that the address, city, state, and zip code are correct
	<input type="button" value="VERIFY MY ADDRESS"/>
<b>Latitude / Longitude</b>	
<b>User-entered Latitude ?</b> <input type="text"/>	<b>Latitude ?</b> <input type="text"/>
<b>User-entered Longitude ?</b> <input type="text"/>	<b>Longitude ?</b> <input type="text"/>
	<input type="button" value="LOOKUP URBAN/RURAL STATUS"/>
<b>Urban/Rural</b>	
<b>User Entered Urban/Rural Status *</b> <input checked="" type="radio"/> Rural <input type="radio"/> Urban	<b>Urban/Rural Status ?</b> <input type="radio"/> Rural <input type="radio"/> Urban
	Unable to determine your status. Please enter Urban/Rural manually in User-Entered field.

View after clicking on “Manage Organization”. You can correct building address if needed. Be sure to select “County” if it’s not listed.

# 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

### Number of Full Time Students \*

374

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

Yes

No

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

Yes

No

### State School Code

School IRN

### State LEA Code

District IRN

### NCES Public State Code

### NCES Public District Code

### NCES Public Building Code

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

Yes

New Construction School

Swing Space

Detention Center

General-Use School

ESA School

BIE

← We'll cover these new options in a second.

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

278

### Alternative Discount Method \*

None

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

- Check boxes to further indicate type of school.
- **Remember, due to COVID-19, we're using last years numbers in most cases.** Verify **Student** and **NSLP** counts. You may have corrected them when filing the FY2020 Form 471. The corrections should be displayed.
- **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.
- If not present, enter School and District IRN's.

# 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?**

Yes

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 \***

2017

CEP Percentage  
(Number to use  
in EPC portal if  
school  
participates in  
CEP)

**59.57%**

- 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 now must provide the CEP Base Year.

# Modify An Organization - CEP Base Year Data

**Claims Reimbursement and Reporting System  
CRRS**

**Ohio** | Department of Education

**Returning Users: Log On**

User ID:

Password:

[Forgot Your Password?](#)  
[Forgot Your User ID?](#)

**Log On**

**Welcome to the  
Claims Reimbursement and Reporting  
System (CRRS)  
and  
Commodities Allocation Tracking  
System (CATS)**

**Password Requirements**

- A user's password **MUST** follow the following rules:
  - 8 to 12 characters in length
  - Must contain a numeric character
  - Must contain a special character (e.g., #, \$, &)
  - Must contain an uppercase letter

- The CEP base year is indicated in the schools CEP schedule that can be found in the school meals application packet in CRRS (**Claims Reimbursement and Reporting System**) on ODE's website
- Your cafeteria director will have access to this

# New Items! – Building Characteristics

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	

- A **general-use school** offers instruction to students drawn from other schools, and student counts can change throughout the year, such as career centers and special education units. **Use a snapshot to determine counts.**
- A **detention center** is treated in the same way as a juvenile justice facility. The state's law must include education for students in juvenile justice facilities within its definition of elementary and/or secondary education. **Use a snapshot to determine counts**
- A **swing space** temporarily houses students from a school which is considered the "main entity" or original location of the student population. The students may need to be temporarily relocated due to closure, construction, etc.
  - **Swing Spaces are not allowed to have any student count information.** The students are included in the "main entity" count.

# New Items! – Category 2 Budget

Districts now have 2 options for reporting counts for Cat 2 Budgets.

Option 1: Provide the count for each school located at the bottom of the page when updating the full-time and NSLP counts.

**\*This is the one I recommend using** if you have 10 schools or less and some have less than 150 students, you'll get the hybrid/blended budget amount. The full-time enrollment count will show up as the C2 budget count. Verify the number and update if needed.

### 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 can re-use the Cat 2 count from year to year but can update it if your enrollment increases.
- **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 FY2021 counts”).

# New Items! – Category 2 Budget

Option 2: Provide the count under the district’s profile

**My Entities**

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

Records Applicant Entities  
**#10426 - School District 10997**

MANAGE ORGANIZATION CREATE A CUSTOMER SERVICE CA... MANAGE ORGANIZATION RELATI... ⋮

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

**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.

How does the district report its student count for Category Two budget? ⓘ \*

One number for my whole district

A number for each school in the district

Sum of Student Counts of all Schools in the District  
1306

**School Information**

Entity Number or Name  
--Please enter an entity name (at least 3 characters) or an entity number--

APPLY FILTERS CLEAR FILTERS

Entity Number	Entity Name	Total Students for C2 budget	Is the student count estimated? ⓘ	Eligible for C2 budget?
6911	School 2 In District 10997	590	N/A	✓ UPDATE
6912	School 3 In District 10997	420	N/A	✓ EDIT
6913	School 1 In District 10997	512	N/A	✓ EDIT

FCC Registration Number ⓘ  
0123456789

⏪ < 1-3 of 3 > ⏩

CANCEL SUBMIT

- Click on the district name and then “Manage Organization”
- You will see the “Sum of Student Counts” and a list for each school if “A number for each school in district” is selected.
- You have the option to edit each site from here. Click on “Edit”, enter the count, and click on “Update”.

# New Items! – Category 2 Budget

Option 2: Provide the count under the district's profile

You have the option to choose “One number for my whole district”

### 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.

How does the district report its student count for Category Two budget? ⓘ \*

One number for my whole district

A number for each school in the district

District Student Count \*

1306

FCC Registration Number ⓘ

0123456789

- Click on the district name and “Manage Organization”
- Choose the option **“One number for my whole district”** and enter the total full-time enrollment for the district. **The budget will be based on the total count X \$167.**
- Click on “Submit” and provide a nickname.

## My Landing Page



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

Welcome, [School District 18!](#)

### Notifications

Notification Type *Please select a value*

Funding Year *– Select a Funding Year –*

Status All  
 Generated  
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
--------------	-------------	-------------	--------------	--------------

No items available

From the Landing Page, click on “Manage Users” and then select organization from the list.

Click on “Create New User”

## Manage Users

### Existing Organizations

<input type="checkbox"/> Organization ID	City	State
<input type="checkbox"/> School District 18	Springfield	OH

CANCEL

CREATE A NEW USER

ADD AND REMOVE EXISTING USERS

MANAGE USER PERMISSIONS

# Creating New User

## Create A User for School District 18

### User Details

User Type  
Applicant

First Name *	Job Title *
Last Name *	Phone Number *
Middle Initial	Phone Extension
Email *	Confirm Email *

will be used as the username for the new account

← Enter User Details

### Address

Address Line 1 *	County
Address Line 2	Zip Code *
City *	Zip Code Extension
State *	

← Modify address if necessary. The Billed Entity's address is listed by default.

### User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.

Select permissions for the new user, which are defined on the site.

Apply All	470 Permission	471 Permission	498 Permission	FRN Mod Permission	486 Permission	Appeals Permission
Full	Full	Full	School or Library Official	Full	Full	Full

← You can assign rights per form, or choose "Apply All". For the Form 498, choose "School or Library Official" or "Financial Contact".

Cancel CONTINUE

When done, click on "Continue"

# Confirm New User

**Confirm User Details**

**User Details**

User Type Applicant

First Name Test Job Title Tech Coord

Last Name Test Phone Number 740-253-1111

Middle Initial Phone Extension

**Email**

Email [REDACTED]

**Address**

Address Line 1 [REDACTED] County [REDACTED]

Address Line 2 [REDACTED] Zip Code [REDACTED]

City [REDACTED] Zip Code Extension [REDACTED]

State OH

**User Permissions**

Apply All 470 Permission 471 Permission

[REDACTED] Full Full

PREVIOUS CANCEL **SUBMIT**

Confirm information and click on “Submit” and then “Yes” in the pop-up to proceed.

This will create a user in the system. Would you like to proceed?

NO **YES**

The new user will receive an email prompting them to sign into One Portal and create a password. They must accept the terms and conditions to complete the login.

**Note:** The user must complete these steps for them to show up under your organization.

# Managing User Permissions

## My Landing Page



Training

Universal Service  
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Welcome, School District 18!

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#)

[Manage Users](#) | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

From the Landing Page, click on “Manage Users” and then select organization from the list.

## Notifications

Notification Type

Status  All  
 Generated  
 Not Generated

Funding Year

Notification

Description

Issued Date

Generated By

Click on “Manage User Permissions”



Training

## Manage Users

### Existing Organizations

ANY TOWN

Organization ID

City

State

SAMPLE LOCAL SCHOOLS

POLAND

OH

Cancel

Create a New User

Add and Remove Existing Users

Manage User Permissions

# Managing User Permissions

## User Permissions

In the table below, you can designate the permissions that you wish to give to each of your users for the various tasks you can complete in the portal. This table will continue to grow as more functionality comes online.

- Full rights users can start, complete, submit and certify forms.
- Partial rights users can start and enter data in the form, but cannot submit and certify them.
- View Only users can only see forms created by other people in your organization but cannot create forms themselves.
- Form 498 School or Library Officials can start, complete, submit, certify, modify, and deactivate Forms 498.
- Form 498 General Financial Contacts can start, complete, and submit Forms 498, but cannot certify new or updated Forms 498 or deactivate existing Forms 498.

Name	Email	Apply All	470 Permission	471 Permission	498 Permission	FRN Mod Permission	486 Permission	Appeals Permission
School District 18 User 1	school.district18.us er1@mailinator.com	<input type="text"/>	Full	Full	School or Library	Full	Full	Full

PREVIOUS

CANCEL

SUBMIT

We see an explanation of the permissions available.

Use the drop-down menu to assign the correct permissions and click on “Submit”.

# Modify Account Administrator

From your Landing Page, choose your Billed Entity organization, click on “Related Actions” and then Modify Account Administrator.

**My Landing Page**

Training  
**Universal Service Administrative Co.**

Welcome, [School District 18!](#)

**Notifications**

Notification Type: FCDL  
Funding Year: 2017

Status:  All  
 Generated  
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

**My Entities**

Entity	Entity Number	City	State	Zip Code
School District 18	170	Springfield	OH	45501
School District 18 NIF	171	Springfield	OH	45501
School District 18 School A	172	Springfield	OH	45502
School District 18 School B	173	Springfield	OH	45501

Records Applicant Entities

## #170 - School District 18

Summary Customer Service Modifications Additional Information Discount Rate Contracts FCC Forms FRN Appeals News **Related Actions**

- Create a New User**  
This function allows you to create a user for your entity.
- Add or Remove Existing Users**  
This process allows user to add and remove users from an organization
- Manage User Permissions**  
This function allows you manage the permissions for one or more users.
- Manage Organization**  
This function allows you to update information about an entity or BEN.
- Modify Account Administrator**  
This process allows you to transfer the Account Administrator function to another individual.

# Modify Account Administrator

Uncheck the box to the left of the current user's name, and select the new administrator. Click on "Continue", confirm information, and then select "Submit".

**Organization Details**

Name	ANY TOWN LOCAL SCHOOL	FCC Registration Number	0014000000
Address	1500 MAIN STREET ANY TOWN, OH 41000	Organization Type	Applicant
Mailing Address	1500 MAIN STREET ANY TOWN, OH 41000	Phone Number	614-555-1212
		Email	

**Modify Account Administrator**

Current Account Administrator  
john.smith@anytown.org

Select a new Account Administrator

<input type="checkbox"/>	First Name	Last Name	Email	Title
<input checked="" type="checkbox"/>	John	Smith	john.smith@anytown.org	Director of Technology Integration and S
<input type="checkbox"/>	Over	Loaded	overloaded@anytown.org	Assistant Director of Technology Integration and Support Services

Cancel CONTINUE



**That's E-Rate in a nutshell!!**

# Contact Information

## E-Rate Support and Information

**Lorrie Germann:**

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