

TRAINING AGENDA

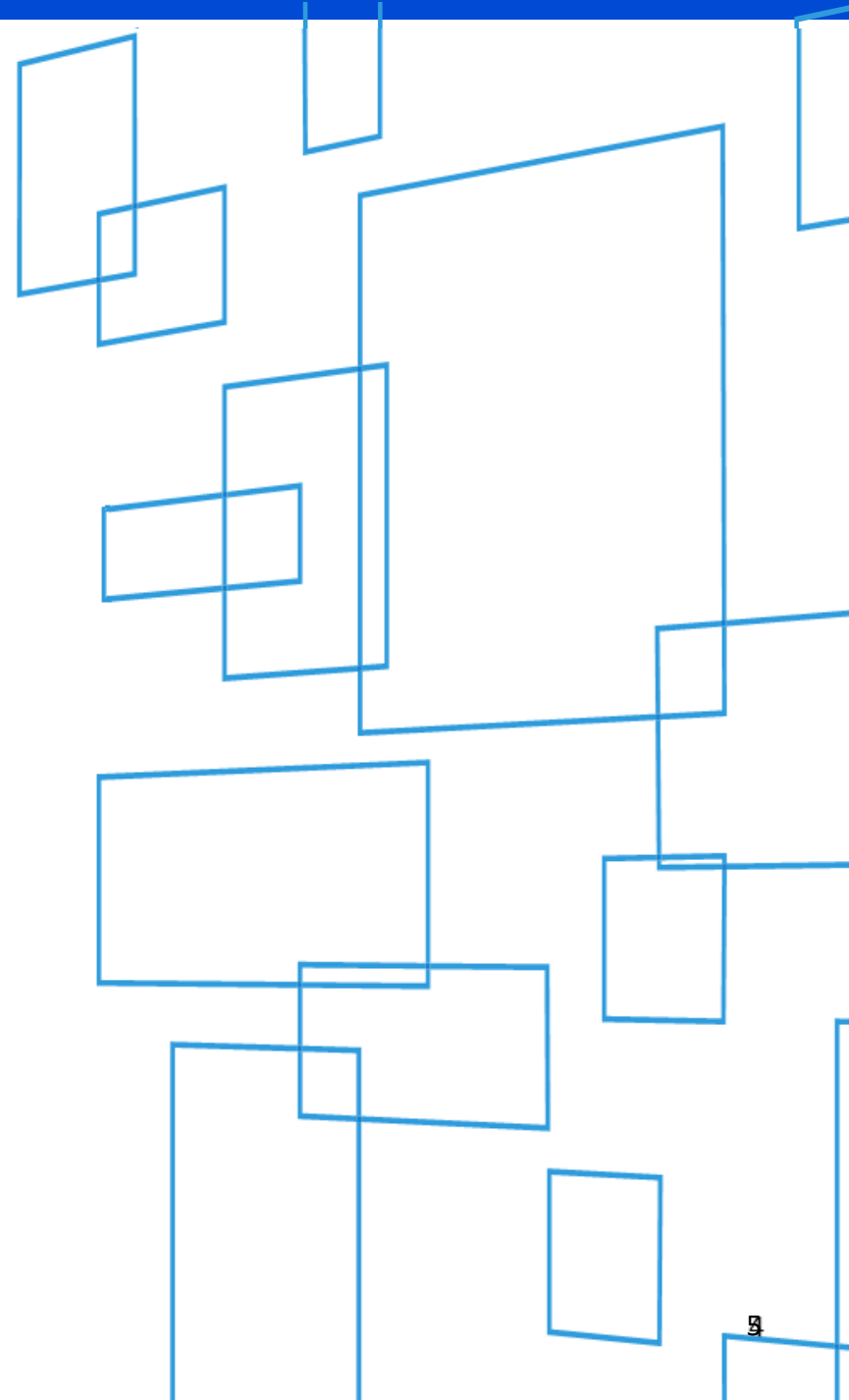
- E-Rate Basics
 - – Continued COVID-19 Impact
- Category 2
- Application Process
 - Break (10:30 or so)
- Eligible Services
- Portal Fundamentals

E-Rate Basics

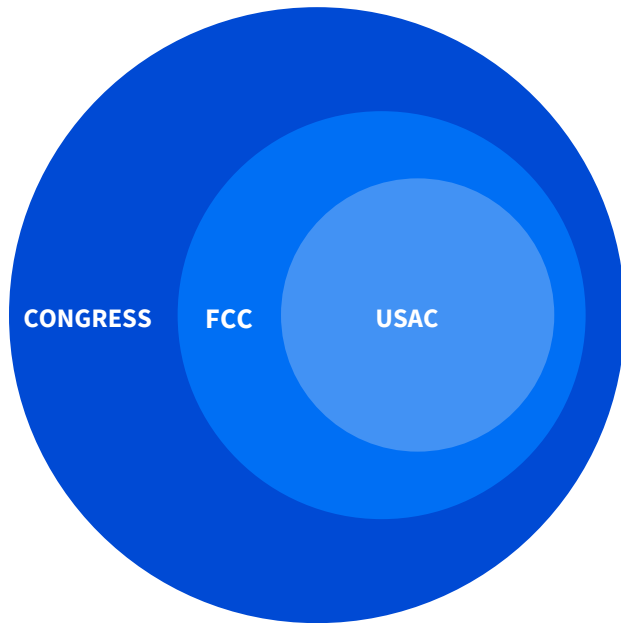
Mission Statement

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 start (different from fiscal or school years).
- For example, FY2022 starts on July 1, 2022, and ends on June 30, 2023.



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)

ELIGIBILITY - Services

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

- All buildings within the district or library system 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 total number of students district-wide, or total square footage for libraries, system-wide.
- Only schools and libraries qualify, not support facilities (bus garage, maintenance, or admin buildings)

ELIGIBILITY - Schools

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



ELIGIBILITY - Libraries

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



* LSTA = Library Services and Technology Act

ELIGIBILITY – Non-instructional Facilities (NIFs)

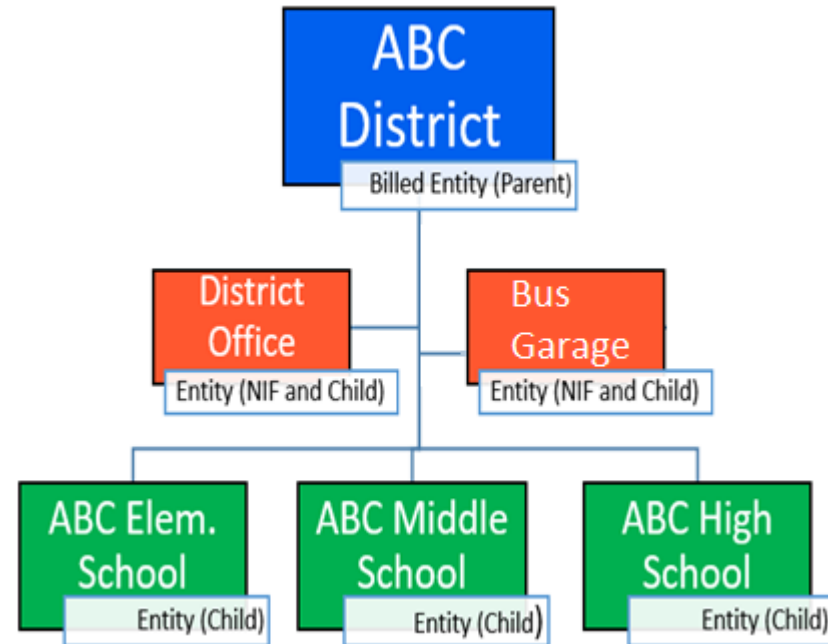
- Non-instructional facilities (NIFs) are eligible for discounts for **Category 1 only**.
- NIFs are:
 - School buildings that typically don't have classrooms (admin facility, bus garage, maintenance or athletic facility).
 - Library buildings that don't have public areas.



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

DISCOUNTS – Overview

Schools:

Discounts depend on :

- 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 (we're still using the 2010 census data as 2020 hasn't been released yet).
- 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

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

COVID-19 Impact

- Due to COVID, the USDA has extended free lunches for all students through 6/30/2022. **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 FY2022, we will use the October 2019 version (or whatever counts used last filing season or the year before).**
 - You 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.
 - If the household income falls under Reduced or Free Meals, all school-aged children in the household would be counted
- Data collected for scholarships can be used if the income eligibility meets the NLSP guidelines
- For the 2021 NSLP Income Eligibility Guidelines, go to <https://www.fns.usda.gov/cn/fr-030421>

INCOME ELIGIBILITY GUIDELINES												
Effective from July 1, 2021 to June 30, 2022												
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	
48 CONTIGUOUS STATES, DISTRICT OF COLUMBIA, GUAM, AND TERRITORIES												
1	12,880	23,828	1,986	993	917	459	16,744	1,396	698	644	322	
2	17,420	32,227	2,686	1,343	1,240	620	22,646	1,888	944	871	436	
3	21,960	40,626	3,386	1,693	1,563	782	28,548	2,379	1,190	1,098	549	
4	26,500	49,025	4,086	2,043	1,886	943	34,450	2,871	1,436	1,325	663	
5	31,040	57,424	4,786	2,393	2,209	1,105	40,352	3,363	1,682	1,552	776	
6	35,580	65,823	5,486	2,743	2,532	1,266	46,254	3,855	1,928	1,779	890	
7	40,120	74,222	6,186	3,093	2,855	1,428	52,156	4,347	2,174	2,006	1,003	
8	44,660	82,621	6,886	3,443	3,178	1,589	58,058	4,839	2,420	2,233	1,117	
For each add'l family member, add	4,540	8,399	700	350	324	162	5,902	492	246	227	114	

ADMIN WINDOW: UPDATING ENTITY INFORMATION

- The Admin Window is the period of time we update entity information in EPC – the online E-Rate portal, including:
 - Adding new buildings
 - Correcting addresses
 - Correcting student/NSLP data
 - Adding Category 2 budget counts
- Admin Window opening date is Oct. 26th, 2021 – and will close several days prior to the opening of the Form 471 window.
 - After the Admin window closes, applicant profiles will be locked

Category 2 Budgets FY2021 – FY2025



Cat 2 Budget Basics

- All C2 budgets reset in FY2021
- We have a set 5-year cycle (FY2021-FY2025), (FY2026-FY2030), etc.
- C2 budgets are calculated at district or library system level (one consolidated budget)
- Multiplier is 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.***

Cat 2 Budget Basics

- **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.**
 - 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 were eliminated as of 7/1/2021, but:**
 - applicants must record reason and date of transfer and update asset inventory.
 - no notice to USAC is required.

Calculating Your Budget – OPTIONS

- The Category 2 Order **created an exception for small school districts and library systems.**
 - Specifically, it allows school districts and library systems 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.
- 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	Based on student count
ABC Middle School	532	\$88,844	\$88,844	
ABC Elementary	212	\$35,404	\$35,404	
West Elementary	125	\$20,875	\$25,000	Based on budget floor
East Elementary	131	\$21,877	\$25,000	
Totals	1567	\$261,689	\$268,937	

- 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:

[¹⁰³] ...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

1

My Entities

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

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

News Tasks (1) Records Reports Actions

Records / Applicant Entities

321456 ABC CITY SCHOOLS

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

Category Two Budget Status

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

[GET CATEGORY 2 BUDGET INFORMATION](#)

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

Category Two Budget Status

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

✓2021 - 2025

✓2021 - 2022 (Budgeted Entity)

>Show column definitions

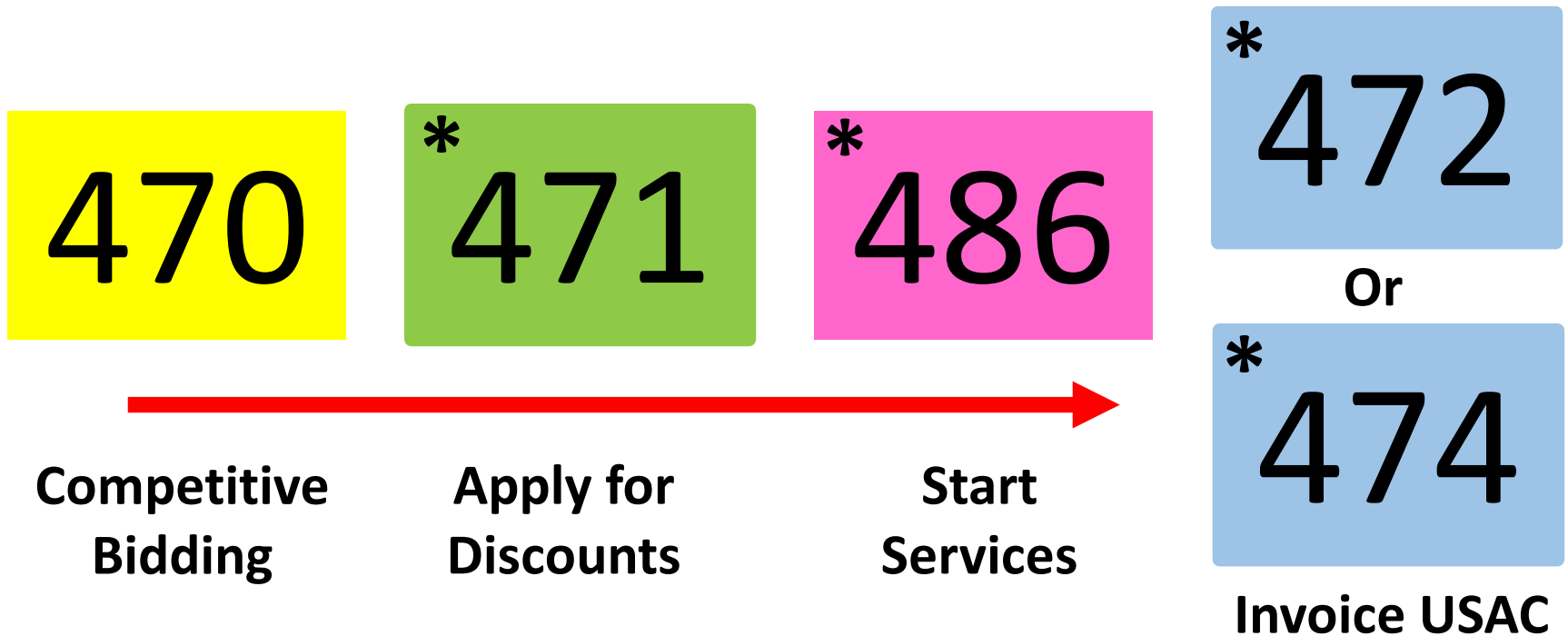
Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Preliminary	\$482,914.00	\$0.00	\$19,504.96	\$19,504.96	\$463,409.04	View Details

Category Two Budget Details

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

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

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.
 - **NOTE: The FY2022 Form 470 has changed!!**
 - 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">• Determine services needed, file FCC Form 470 and RFP.• Run competitive bidding process.• Select winning bidder, with price of eligible product and services as primary factor.• Respond to PIA.• File other applicant forms (FCC Forms 471, 486, 472, 500, etc.)• Document their compliance with FCC rules on an ongoing basis.	<ul style="list-style-type: none">• Respond to FCC Form 470 and RFPs.• May assist with responding to PIA on technical services questions (but not competitive bidding).• File other service provider forms (FCC Forms 473, 474, etc).• Document their compliance with FCC rules on an ongoing basis.

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

- The FCC has waived the E-Rate gift rule through **June 30, 2022** (the end of funding year 2021) to provide relief to schools and libraries affected by COVID-19 and make it easier for service providers to support remote learning efforts.
- 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 2022

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.**

Sample Disqualifying Factors

- All hardware quoted must be compatible with existing infrastructure.
- Hardware quoted must be new with manufacturer's warranty. Quotes for used 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.
- ISP must also supply or include direct access to Internet 2. **and/or,**
 - Vendors that provide direct peering relationships to Ohio Department of Education are preferred.
- Bandwidth/Internet Access quotes must include basic firewall service. The cost must be included in the service and not shown as a separate cost. Quotes showing options for service without basic firewall and a second option that includes firewall service will not be considered.
- **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.**

A Word doc listing Disqualifying Factors can be found on my "Resource Library" page at <https://www.ohio-k12.help/erate/e-rate-resources/>.

- **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.**

- **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 ELIGIBLE 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
TOTAL	100	55	65	90

- Bidder 3 wins because they received the most points.

For a copy of a Category 1 and Category 2 bid matrix and acceptance letter, go to <https://www.ohio-k12.help/erate/e-rate-resources/>

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 FY2022, both the applicant and the service provider must retain all records until at least June 30, 2033.



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)**.

A step-by-step guide explaining how to file the Form 486 can be found on my “Resource Library” page at <https://www.ohio-k12.help/erate/e-rate-resources/>.

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.

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.

- 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)

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.

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

A step-by-step guide explaining how to file the Form 472 (BEAR) can be found on my “Resource Library” page at <https://www.ohio-k12.help/erate/e-rate-resources/>.

Invoicing Methods

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 access to the BEAR portal and an approved FCC Form 498 if you intend to file BEAR Forms.
 - PINs are no longer needed
- To request access to the BEAR Form, open a customer service case in EPC. Complete a [BEAR Access Template](#) with the required information.
- Instructions can be found at <https://www.usac.org/e-rate/resources/forms/bear-form-access/>



Applicant FCC Form 498

Overview

- Applicants that choose to file an FCC Form 472 (BEAR) must have an **FCC Form 498** on file 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.
 - The invoice deadline for FY2020 **recurring services** is October 28, 2021.
 - The deadline for FY2020 **non-recurring** services is January 28, 2022.
- 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:

Service Type/Form	Example of Service	"Normal" Date	"COVID" Date
BEAR/SPI - Cat 2 Non-Recurring Service	Cost paid for Internal Connections Hardware	1/28/2021	1/28/2022

- 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 Oct. 26th – 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.

The Form 500 and Post Commitment Options To Be Aware Of



a.k.a - **Funding Commitment Adjustment Request Form**

We can file the FCC Form 500 to accomplish one or more of the following:

- To adjust the service start date reported on a previously filed [FCC Form 486](#)
- To adjust the contract expiration date listed on the [FCC Form 471](#)
- To cancel a Funding Request Number (FRN) or reduce the amount of an FRN
 - This is important if you request Category 2 funding but don't use all the funds requested. This will put the unused funds back into your budget.
- To request a service delivery extension for non-recurring services.
 - If the delay is outside of the applicant/service provider's control, you may request more time, up to a full year.

Corrective SPIN Change

- A corrective SPIN change is a notification to USAC that the SPIN associated with a Funding Request Number (FRN) is not correct.
- Corrective SPIN changes include the following:
 - Data entry errors were made when the FCC Form 471 was submitted such as entering the wrong SPIN (making a typo) or entering the wrong SPIN because your provider has multiple SPINs, and you chose the wrong one.
 - A merger or acquisition. The original service provider has merged with, or has been acquired by, another company and the SPIN indicated on the FRN has changed.

Operational SPIN Change (These are harder to get approved!)

- Applicants may request an operational SPIN change to replace the provider associated with a specific Funding Request Number (FRN).
- An operational SPIN change is permitted when:
 - It is allowed under the applicant's state and local procurement rules.
 - It is allowable under the terms of any contract between the applicant and its original service provider.
 - The applicant has notified its original provider of its intent to make the change.
 - There is a legitimate reason to change providers (e.g., breach of contract or the service provider is unable to perform the requested services).
 - The newly selected service provider received the next highest point value in the original bid evaluation. If the applicant did not receive multiple bids, the applicant must submit a statement explaining that it received only one or no bids.

*Changing providers because the services are available at a lower cost from another provider or because you wish to do business with a provider that didn't participate in the bidding process are not considered legitimate reasons for change and will be denied.

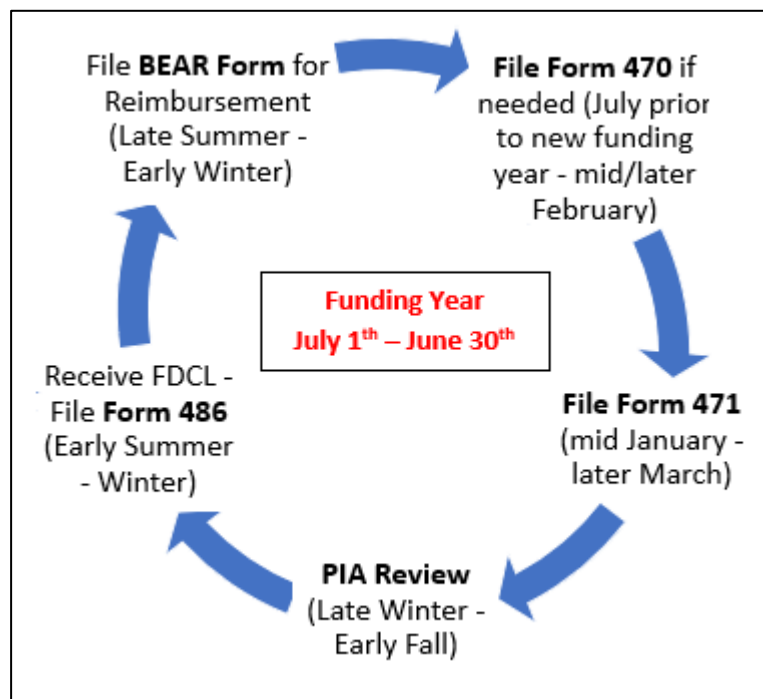
Service Substitutions

- A service substitution is a change in the products and/or services specified in the [FCC Form 471](#)
 - Substitutions must meet the following conditions :
 - The substituted services or products have the same functionality as the services or products contained in the original proposal.
 - The substitution doesn't violate any contract provisions or any state or local procurement laws.
 - The substitution doesn't result in an increase in the percentage of ineligible services or functions.
 - The requested change is within the scope of the establishing [FCC Form 470](#), including any Requests for Proposal (RFPs), for the original products and/or services.
- * If the new product or service costs more than what was originally requests, E-Rate will not cover the overage.

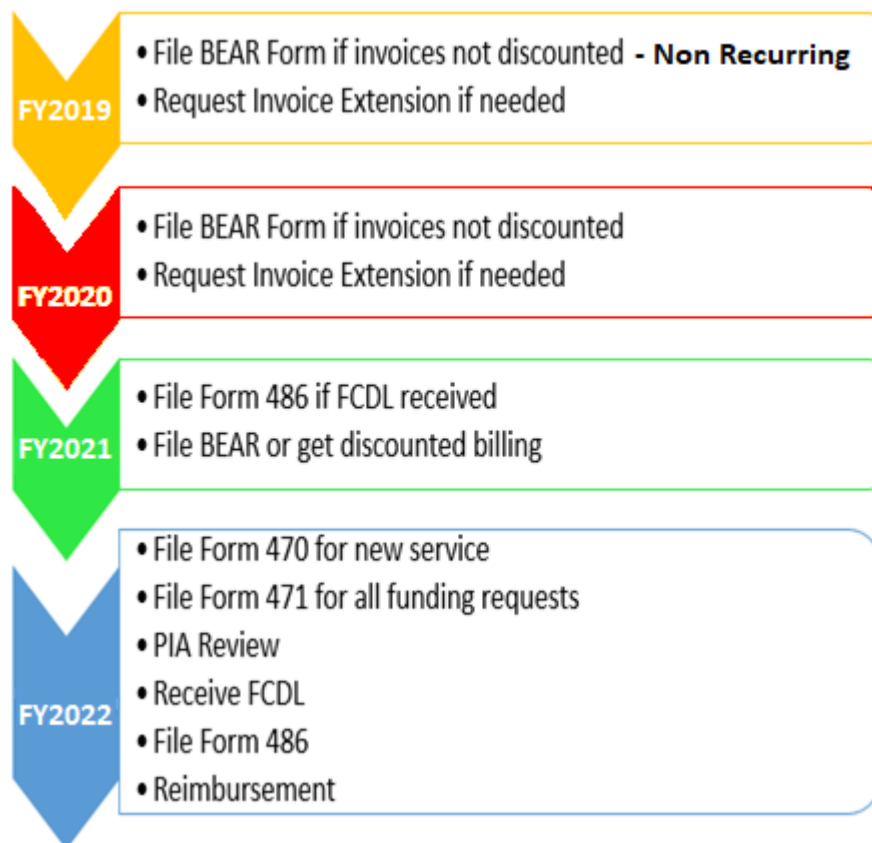
Funding Cycle

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



E-Rate FY2022-23 Timeline Checklist

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

Timeline Checklist

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



Applicant: ABC Local School District
Billed Entity: 129000

FY	Requested FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2	Total Committed	Total Disbursed	Remaining Balance	Util. %
2021	5	5	5	\$67,375.20	\$56,077.49	\$11,149.54	\$67,227.03	\$0.00	\$67,227.03	0%
2020	6	5	5	\$83,369.71	\$58,018.46	\$24,271.75	\$82,290.21	\$82,290.21	\$0.00	100%
2019	5	5	5	\$55,292.86	\$48,352.46	\$6,940.40	\$55,292.86	\$47,574.00	\$7,718.86	86%
2018	8	8	8	\$30,165.38	\$29,318.25	\$847.13	\$30,165.38	\$29,261.02	\$904.36	97%
2017	6	6	6	\$31,363.19	\$31,363.19	\$0.00	\$31,363.19	\$31,207.66	\$155.53	100%
2016	8	8	8	\$43,379.00	\$34,466.11	\$7,511.79	\$41,977.90	\$39,564.37	\$2,413.53	94%
2015	7	7	7	\$30,244.77	\$29,098.39	\$0.00	\$29,098.39	\$27,924.26	\$1,174.13	96%

471	FRN	SPIN	Service Provider	Service*	Original Request	Current Commitment
211004493	2199004203	143001654	The Chillicothe Telephone Company	IA	\$4,849.20	\$4,849.20
211004493	2199004205	143001654	The Chillicothe Telephone Company	IA	\$39,852.00	\$39,852.00
211018963	2199025917	143005588	CDW Government LLC	IC	\$11,149.54	\$11,149.54
211004493	2199004207	143001654	The Chillicothe Telephone Company	IA	\$10,746.00	\$10,746.00

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

Eligible Services



Eligible Services: Category One

Per the FY 2021 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

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

*When participating in E-Rate, Supply Chain rules must be observed. For more info, go to <https://www.usac.org/about/reports-orders/supply-chain/> .

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%)	

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.**

Managed Internal Broadband Services (MIBS)

- Covers the operation, management, or monitoring of a LAN
- 2 Options:
 - Paying an outside vendor to lease/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 7/1/2022 – 6/30/2023
- 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

The background of the slide features several overlapping, semi-transparent rectangular shapes in various shades of blue. One rectangle in the lower-left area is a solid orange color. The rectangles are arranged in a way that creates a sense of depth and movement, with some appearing to be in front of others.

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.



USAC's One Portal

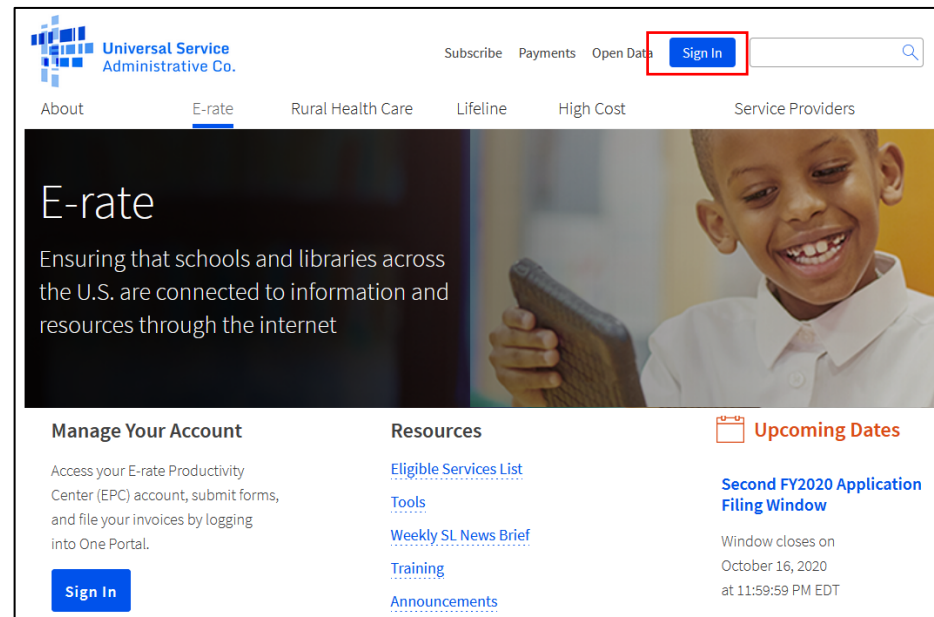
USAC's One Portal

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

We must 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 BEAR access

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



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



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](#)




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](#)



Email Authentication

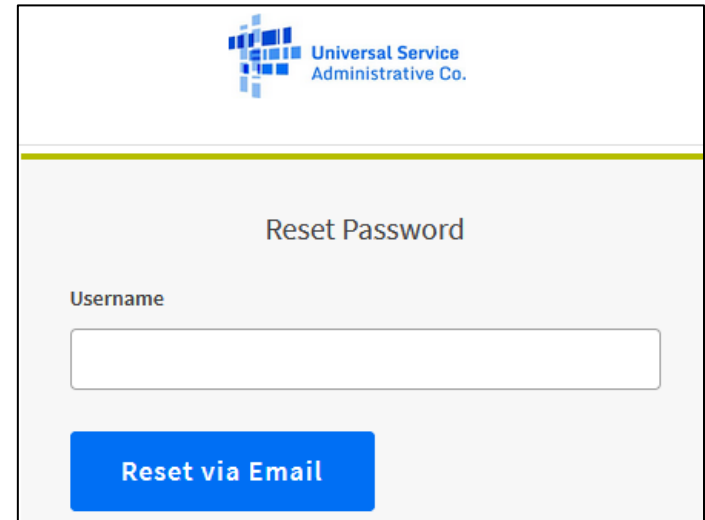
USAC requires multifactor authentication to add an additional layer of security when signing in to your account.

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.



The screenshot shows a web form for resetting a password. At the top right is the logo for Universal Service Administrative Co. Below the logo, the text "Reset Password" is centered. Underneath, there is a label "Username" followed by a text input field. At the bottom of the form is a blue button with the text "Reset via Email".



- 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)

- After entering the one-time verification code, you may see both EPC and BEAR options, as well as ECF.
- Remember, in order to see the BEAR, you need access that was issued under the same email address used for EPC.

The screenshot shows the USAC's One Portal dashboard. At the top, there is a blue header with the USAC logo and the text "Universal Service Administrative Co." on the left, and a "Sign Out" button on the right. Below the header, the word "Dashboard" is displayed on the left, and the user's email "lorrie.germann@gmail.com" with a dropdown arrow is on the right. A yellow notification banner is present, stating: "In accordance with the Supply Chain orders, new certifications have been added to the following forms: RHC - FCC Form 463 and the Telecom invoice, E-rate - FCC Form 473, and High Cost & Lifeline - FCC Form 481. Service providers are required to submit these annual certifications. For additional information, visit the [USAC Supply Chain](#) page." Below the notification, the dashboard is divided into three main sections. The "Upcoming Dates" section on the left shows "No upcoming dates found." The "Schools and Libraries" section in the center contains three items: "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." (highlighted with a red border), "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." (highlighted with a red border), and "Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form 474 (SPI) to request ECF reimbursement." The "Help?" section on the right includes links for "Send us a message" (with a "Click here" link), "Call us" (with the number (888) 641-8722), and a "Click here" link.

Universal Service Administrative Co. Sign Out

lorrie.germann@gmail.com

Dashboard

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

Upcoming Dates

No upcoming dates found.

Schools and Libraries

E-rate Productivity Center (EPC) - E-rate Program participants use the E-rate Productivity Center to manage program processes, receive notifications and to contact customer service.

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.

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

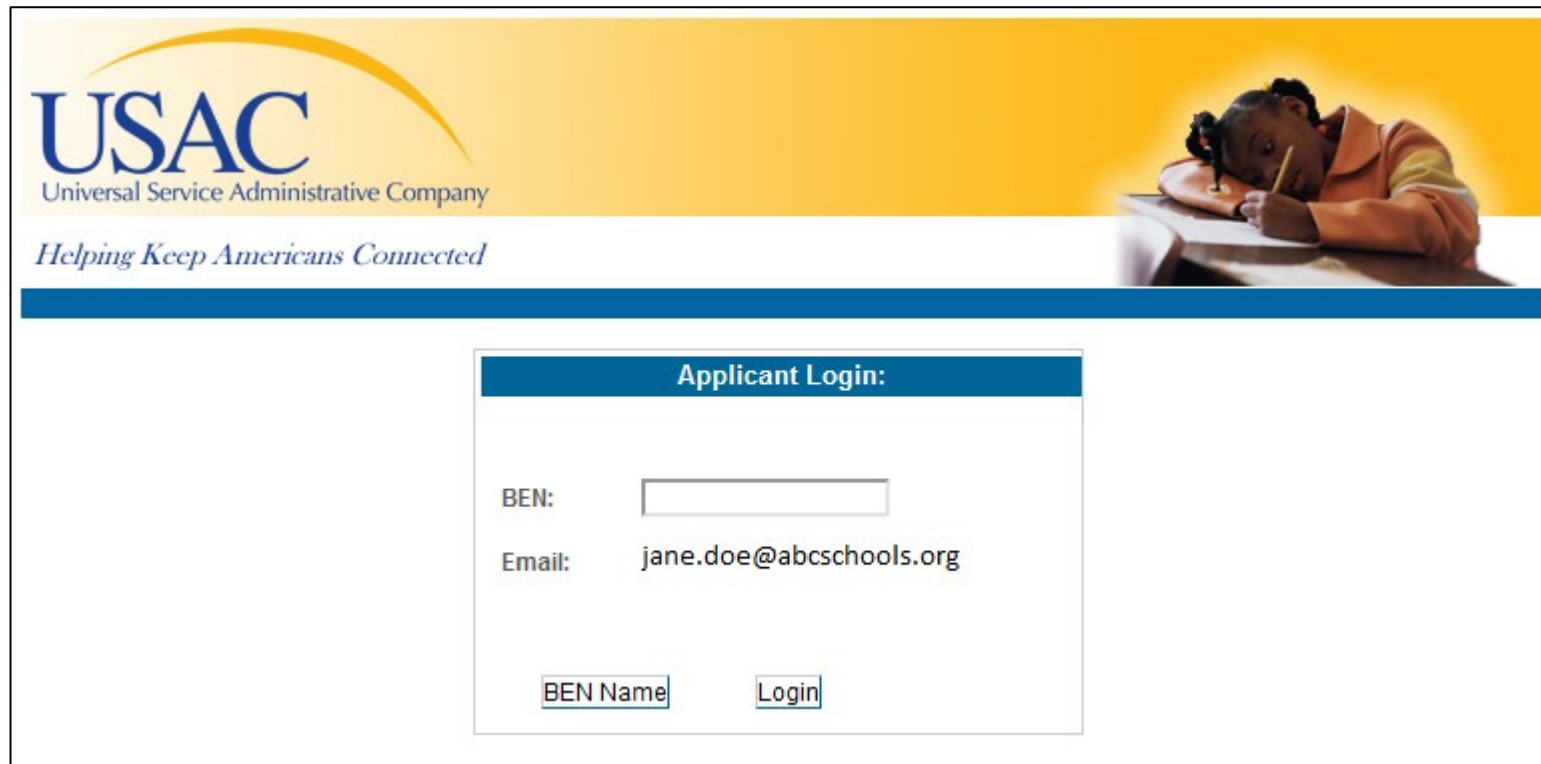
Help?

Send us a message [Click here](#)

Call us (888) 641-8722

USAC's One Portal

- If you choose the BEAR option, you're taken to the legacy BEAR site where you'll enter your Billed Entity Number (BEN).



The screenshot shows the USAC (Universal Service Administrative Company) website header with the logo and tagline "Helping Keep Americans Connected". The main content area features a blue bar with the text "Applicant Login:". Below this, there is a form with two input fields: "BEN:" and "Email:". The "Email:" field contains the text "jane.doe@abcschools.org". At the bottom of the form, there are two buttons: "BEN Name" and "Login".

USAC
Universal Service Administrative Company
Helping Keep Americans Connected

Applicant Login:

BEN:

Email: jane.doe@abcschools.org

- 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.

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 --

Funding Year -- Select a Funding Year --

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

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

[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								

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 the 'My Applicant Landing Page' for a user named 'Applan'. The page has a blue header with navigation tabs: 'News', 'Tasks (3)', 'Records', 'Reports' (which is selected), and 'Actions'. On the left, there is a logo for 'Universal Service Administrative Co.' with the word 'Training' above it. Below the logo, it says 'Welcome, School District 10997!'. To the right of the logo, there is a list of links: 'Funding Request Report', 'FCC Form 470', 'FCC Form 471', 'FCC Form 486', 'Appeal', 'IDD Extension', 'FCC Form 500', 'SPIN Change', 'Service Substitution', 'Manage Organizations' (which is highlighted with a red box), 'USAC Website', and 'Contact Us'. Below the links, there is a section titled 'Pending Inquiries'. It contains two dropdown menus: 'Type' with the text '-- Select a Type --' and 'Funding Year' with the text '-- Select a Funding Year --'. To the right of these dropdowns is a text input field labeled 'Application/Request' with the placeholder text '-- Enter an Application/Request ID or Nickname --'. At the bottom right of the page, there are two buttons: 'APPLY FILTERS' and 'CLEAR FILTERS'.

News Tasks (3) Records Reports Actions

My Applicant Landing Page

Training
Universal Service
Administrative Co.

Welcome, School District 10997!

Pending Inquiries

Type -- Select a Type --

Funding Year -- Select a Funding Year --

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

Funding Request Report | FCC Form 470 | FCC Form 471 | FCC Form 486 | Appeal | IDD Extension | FCC Form 500 | SPIN Change | Service Substitution | **Manage Organizations** | USAC Website | Contact Us

APPLY FILTERS CLEAR FILTERS

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

Filing Program Forms

Notes on filing program forms

- FCC Forms 470, 471, 486 can be filed from the quick links below the menu bar –

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

- A **new** FCC Form 498 can be filed from the Billed Entity's "Organization Detail" summary page by clicking "Related Actions."
 - Only the school or library official or general financial contact will be able to see the FCC Form 498 link.
- To update an **existing** Form 498, click on "Records" on the menu bar, select "FCC Form 498", and then the application record. From there, click on "Modify FCC Form 498"

Landing Page View

My Applicant Landing Page



Training

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

Welcome, [School District 10997](#)!

Pending Inquiries

Type

Application/Request

Funding Year

Notifications

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

Notification Type

Status ☒ All

☐ Generated

☐ Not Generated

Funding Year

Notification	Description	Issued Date	Generated By	Generated On	
No items available					

My Entities

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

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

“Related Actions” Menu

NewsTasks (6)RecordsReportsActions

Records / Applicant Entities

#170 - School District 18

SummaryCustomer ServiceModificationsAdditional InformationDiscount RateContractsFCC FormsFRN AppealsNewsRelated 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

ADD OR REMOVE EXISTING USERS

MANAGE USER PERMISSIONS

...

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



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

Welcome, [School District 18!](#)

Notifications

Notification Type

Funding Year

Status ☒ All
☐ Generated
☐ Not Generated

Notification	Description	Issued Date	Generated By
No items available			

My Entities

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

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

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

[Records](#) / [Applicant Entities](#)

#172 - School District 18 School A

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

Organization Details

Name School District 18 School A
Entity Number 172
FCC Registration Number

Applicant Type School
Status Active

Contact Information

Physical Address 500 North Street
Springfield, OH 45502
Mailing Address 500 North Street
Springfield, OH 45502

Phone Number 555-565-5555
Email school.district18.user1@mailinator.com
Website URL

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

Modify An Organization - School Detail View

Modify An Organization

Name *

Organization Type
Applicant

Physical Address

Address Line 1 *

Zip Code *

Address Line 2

Zip Code Extension

City *

Click the button below to get standard USPS address

State *

County *

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

VERIFY MY ADDRESS

Latitude / Longitude

User-entered Latitude ?

Latitude ?

User-entered Longitude ?

Longitude ?

LOOKUP URBAN/RURAL STATUS

Urban/Rural

User Entered Urban/Rural Status *
☒ Rural
☐ Urban

Urban/Rural Status ?
☐ Rural
☐ Urban

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

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

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

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 options in a second.

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

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 the same counts as last years numbers, in most cases the October 2019 MR-81 info.
- Verify **Student** and **NSLP** counts.
- If you are a school with only part-time students, count them as if they were full-time
- In this example, the school is not participating in CEP, so "No" is indicated.
- If not present, you may 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

Is this school part of a school district?

Yes

☐ New Construction School

☐ Swing Space

☐ Detention Center

☐ General-Use School

☐ ESA School

☐ BIE

Number of Full Time Students *

531

Community Eligibility Program (CEP)? *

☒ Yes

☐ No

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

507

CEP Percentage *

59.57%

CEP Base Year *

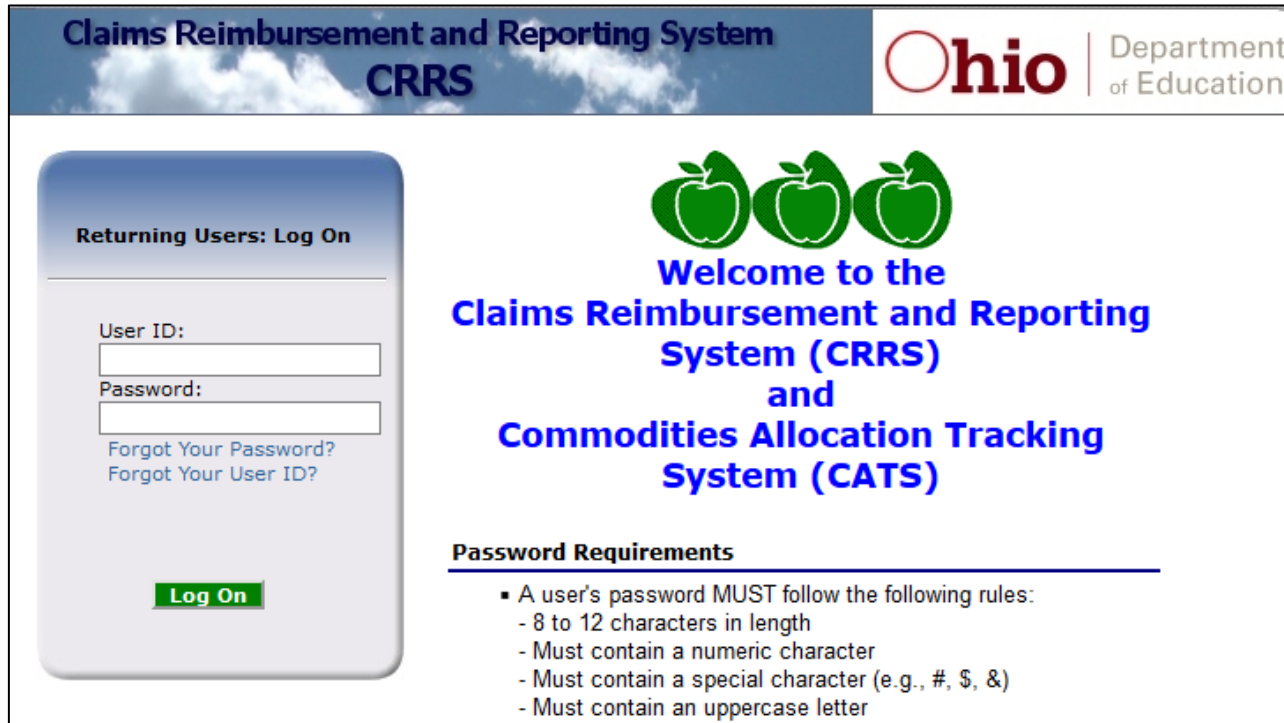
2017

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 must provide the CEP Base Year. This started last year. If this has changed, be sure to update.

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.

School Level – Category 2 Budget

Districts 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 FY2022 counts”).

District Level– 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

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

[MANAGE ORGANIZATION](#) [CREATE A CUSTOMER SERVICE CA...](#) [MANAGE ORGANIZATION RELATI...](#)

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

[CANCEL](#) [SUBMIT](#)

- 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



Training

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					

[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](#)

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 checked="" 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 *
<input type="text"/>	<input type="text"/>
Last Name *	Phone Number *
<input type="text"/>	<input type="text"/>
Middle Initial	Phone Extension
<input type="text"/>	<input type="text"/>
Email	
Email *	Confirm Email *
<input type="text"/>	<input type="text"/>

will be used as the username for the new account

Address

Address Line 1 *	County
<input type="text" value="100 Main Street"/>	<input type="text"/>
Address Line 2	Zip Code *
<input type="text"/>	<input type="text" value="45501"/>
City *	Zip Code Extension
<input type="text" value="Springfield"/>	<input type="text"/>
State *	
<input type="text" value="OH"/>	<input type="text"/>

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.

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

Enter User Details

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

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

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

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:

State: OH

User Permissions

Apply All: [REDACTED] 470 Permission: Full 471 Permission: 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
Administrative Co.

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

Funding Year

Status ☒ All
☐ Generated
☐ Not Generated

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



Training

Manage Users

Existing Organizations

ANY TOWN

☒ Organization ID

☒ SAMPLE LOCAL SCHOOLS

City

POLAND

State

OH

Cancel

Create a New User

Add and Remove Existing Users

Manage User Permissions

Click on “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.co m	<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.

[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: Status: ☒ All ☐ Generated ☐ Not Generated

Funding Year:

Notification	Description	Issued Date	Generated By	Generated On
No items available				






My Entities

Entity	Entity Number	City	State	Zip Code
School District 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



That's E-Rate in a nutshell!!

Contact Information

E-Rate Support and Information

Lorrie Germann:

lorrie.germann@education.ohio.gov

www.ohio-k12.help/erate

Office: 740-223-2420

Cell: 740-253-1153