



Fall FY2024 E-Rate Workshop – Program Basics & Updates

For a copy of today's presentation, go to
<https://www.ohio-k12.help/erate/e-rate-resources/>

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Agenda for Today

- E-Rate Overview
- Eligible Services and Equipment
- Category 2 Budgets
 - **break** (10:30 or so)
- Application Process
- Program Updates (and there are quite a few!)
- E-Rate Productivity Center (EPC)

What is E-Rate?

- Annual \$3.9 billion federal program
 - Funding does not come from the federal budget
- Provides 20-90% discounts on eligible services and equipment
- Program principles:
 - All equipment and services (with a couple of exceptions) must be competitively bid using the E-Rate portal for at least 28 days
 - Applicants **MUST** pay their non-discounted share (cannot be waived)
 - For example, if your discount is 80%, you must pay 20%
- FCC sets all rules and policy
 - USAC (Universal Service Administrative Co.) manages the program/application process
 - We typically start applying 6-12 months before the funding year begins
 - The program is highly deadline-driven

Funding Year

- A Funding Year (FY) starts on July 1 and ends the following June 30.
 - **Our current funding year, FY2023, started on July 1, 2023 and ends on June 30, 2024.**
 - **We are preparing to file for FY2024 which starts on July 1, 2024 and ends on June 30, 2025.**
- **Delivery and installation of services**
 - **Recurring services** (e.g., monthly internet access) must be delivered during the funding year.
 - **Non-recurring services** (e.g., equipment installations) can generally be installed as early as **April 1 (90 days) before the July 1st start of the funding year** through September 30 following the close of the funding year.
 - The September 30 deadline can sometimes be extended, either automatically or by request.

What Entities are Eligible?



- Public libraries eligible for LSTA funding
 - Includes bookmobiles
- Public and non-public, non-profit K-12 schools
 - "Special Needs" Pre-K is eligible (ages 3+) in Ohio
- Non-Instructional Facilities (NIFs)



- Admin buildings, bus barns, data centers, etc.
- Only eligible for broadband/internet services (not equipment)



- Every “parent” organization (i.e., school district, library system) has a Billed Entity Number (BEN)
- Every “child” building must have an Entity Number
 - You must call USAC to obtain Entity Numbers for new buildings

EPC – E-Rate Productivity Center

- The E-Rate application management portal
 - Launched in FY 2016
- All E-Rate forms, letters, and interactions are located in EPC
- This is also where...
 - **We update square footage**
 - **Create users/assign rights**
- Every “Billed Entity” has a BEN portal account
- Every BEN Account has “Users”
 - Each BEN can have only **one** Account Administrator (AA)
 - Only the AA can create/edit user permissions
 - You may have or add additional users and assign specific rights

ADMIN WINDOW

- The Admin Window is the period of time we update entity information in EPC, including:
 - Adding new buildings
 - Correcting addresses
 - Adding Category 2 budget counts
- Admin Window opening date was Oct. 24th, 2023 – and will close several days before the opening of the Form 471 window (usually mid-January).
 - After the Admin window closes, applicant profiles will be locked

Library Discount Calculations

- **Independent Library :**
 - Discount based on the % of students eligible for the NSLP in the school district in which that library is located, and whether the library is located in an urban or rural area
- **Library Systems:**
 - Discount based on the % of students eligible for the NSLP in the school district in which the system's main library is located
and
 - The % of libraries in urban/rural areas
 - If more than 50% are located in rural areas, then the rural discount should be used

How the Discount is Calculated

School District Info	Enrollment	NSLP
East Elementary School	185	83
West Elementary School	434	77
North Elementary School	463	176
Northwest Middle School	164	33
District-Wide High School	1003	282
ABC LOCAL SCHOOL DISTRICT	4518	1208

% NSLP = 29%

Libraries	Urban/Rural
East Branch Library	R
West Branch Library	R
North Branch Library	U
South Branch Library	U
Southwest Main Library	U
Administration Office	n/a
ABC Public Library	U

Majority of libraries are Urban

Discount Matrix

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

% NSLP = 29% and a majority of libraries are Urban

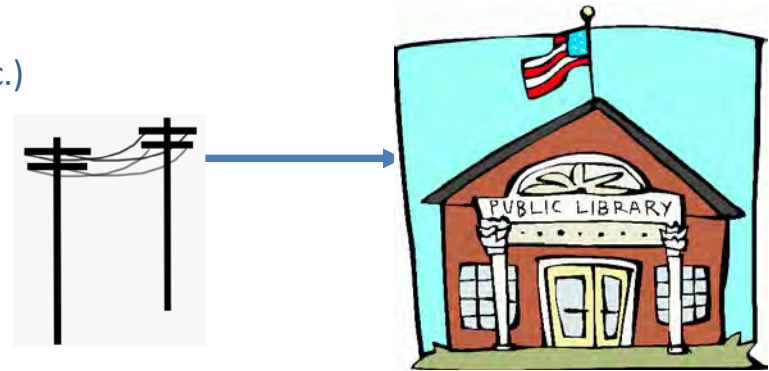


E-Rate Eligible Services

Categories of Service

- **Category 1** – Services that go TO the library

- Subcategories:
 - Data Transmission Services (fiber, coaxial cable, etc.)
 - Internet Access
- Maximum discount is 90%
- No E-Rate funding caps
- Services must be received July 1 – June 30
- All buildings are eligible for Cat 1 funding



- **Category 2** – Services/equipment that go INSIDE the library

- Subcategories:
 - Internal Connections
 - Basic Maintenance of Internal Connections
 - Managed Internal Broadband Services (MIBS)
- Maximum discount is 85%
- Subject to 5-year “C2 Budget” (funding cap)
- Equipment can be received April 1 – Sept 30 (18 months)
- **NIFs are NOT eligible for Cat 2!**





What's Eligible Under Category 1

C1: Data Transmission Services

Most Common:

- Leased Lit Fiber
- Cable Modem/DSL/FIOS
- Bundled Internet Access (with transport)

Other Eligible Fiber:

- **Leased Dark Fiber *** (Someone else owns it but you're responsible for lighting it)
- **Self-Provisioned Fiber** (Build/Own Your Own Network) *
- Special Construction Charges
 - Costs for vendor to build out network
- Installation Charges
 - One-time charge to "turn on" service

* Additional bidding requirements apply

Also Eligible (less common):

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

Not Eligible:

- Voice services
- Duplicative (redundant) services
- Filtering

CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option (CABIO)

- Schools and libraries seeking “Commercially-Available Business Class Internet Services” are not required to file a Form 470
- Typically, only Cable-Modem, DSL, or FIOS Internet Service
- Commercially Available means that it is publicly available to non-residential customers (such as enterprise, small business, or other government customers) in the same form and at the same rates that it is offered to schools or libraries
 - Basically, this is an internet service that is available on a vendor’s website for its business customers
- Minimum speeds must be 100 Mbps downstream and 10 Mbps upstream
- Cost must be \$3,600 or less annually (pre-discount)
 - Cost must be per-building and cannot be averaged across multiple buildings
 - \$3,600 includes any installation costs, equipment rental, taxes and fees

The CABIO option is geared (but not limited) to small libraries and small non-public schools or NIFs using cable modem-type services



What's Eligible Under Category 2

Three Sub-Categories for C2

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

Internal Connections

- Wireless Access Points/Controllers
- Network Routers & Switches
- In-Building Structured Cabling
- Caching Servers
 - Only eligible servers
- Firewall Appliances
- Racks and UPSs
 - That support eligible equipment only
- Equipment licenses
 - Pre-paid, multi-year licenses can be requested in first year
- Cloud-based functionality of eligible equipment
- Operating system software to support eligible equipment
- Installation and configuration
 - If wanted, be sure to specify this in your 470/RFP
- Taxes and fees
- Basic training on use of equipment
- **Not eligible:**
 - **Cybersecurity!!!!!!**
 - Storage Devices
 - Voice/Video Components
 - End User Devices
 - Security cameras
 - Advanced firewall functions, like anti-spam, anti-virus, etc.

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 manufacturers' websites or documents they have provided, publishing their cost allocations.

- [Cisco/Meraki](#)
- [Fortinet](#)
- [HP Aruba](#)
- [Juniper Networks](#)

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%)	

- [Palo Alto Networks](#) (click on "Palo Alto Network Product Eligibility Guide" to download PDF)

- [Sophos](#)

- Or call USAC at 888-203-8100, who should be able to tell you if the SKU is fully eligible

Internal Connections Purchase Timeline

- Equipment can be purchased as early as April 1, prior to funding year start
 - For example, applicants can purchase equipment on April 1, 2024 for FY 2024, even though the funding year doesn't begin until July 1, 2024
 - **However...** vendors/applicants cannot be reimbursed from USAC until July 1
 - Applicants that purchase equipment prior to receiving funding commitment letter are risking paying full price
- Equipment can be purchased as late as September 30, following the end of funding year
- Allows applicants two full summers to install equipment

FY 2024 - Non-Recurring Services/Equipment Purchases - April 1, 2024 - Sept 30, 2025																	
			FY 2024 - Recurring Services - July 1, 2024 - June 30, 2025														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2024	2024	2024	2024	2024	2024	2024	2024	2024	2025	2025	2025	2025	2025	2025	2025	2025	2025

Basic Maintenance (BMIC)

- Special eligibility conditions:
 - 100% eligible = basic tech support, configuration changes
 - Costs common when purchasing new equipment
 - Not eligible = Next Business Day equipment replacement
 - Conditionally eligible = repair of equipment, cable maintenance
 - E-Rate will commit based on amount of contract
 - BUT.... Will only reimburse for time/parts used
- Multi-year, pre-paid contracts must be amortized
 - Cannot apply for full cost of multi-year BMIC contract in Year 1
 - Must amortize and request discounts for that year, annually
- Can only be for services/work performed during 12-month funding year (7/1/2024 – 6/30/2025)
 - Does not follow the 4/1/2024 – 9/30/2025 schedule
 - Does not follow the first 12 months of ownership schedule

Managed Internal Broadband Svcs

- Managed Internal Broadband Services (MIBS)
- Covers the operation, management, or monitoring of a LAN
- 2 Options:
 - Paying an outside vendor to own/manage the equipment
 - Paying an outside vendor to manage school-owned equipment
- Subject to the C2 budget caps
- Traditionally used by small schools/districts and libraries that don't have their own IT staff

Library Small C2 Bidding Exemption

- Beginning in FY 2024, libraries are exempt from bidding Category 2 equipment or services if:
 - Total, pre-discount amount is \$3,600 or less
 - Total cost is per library and cannot be averaged over multiple libraries
 - Cost-effective rules still apply
 - Contracts still must be signed prior to filing the Form 471

Equipment Transfer/Disposal Rules

- **Receiving equipment:** Be sure to label each piece and record it in your asset inventory
 - *Make/model/serial number/building/room/FRN/date installed*
- **Transfers:** E-Rate funded equipment may be transferred between eligible schools or libraries within the BEN
 - If equipment is transferred between buildings within 5 years from date of purchase, applicants must record reason and date of transfer and update asset inventory
 - No notice to USAC is required
 - Asset inventory must be retained for 10 years from date of purchase
- **Disposal:** Equipment may be disposed of, sold, moved to a NIF, etc. after 5 years from the date of installation
 - No notice to USAC is required but asset inventory must be updated

NIFs Not Eligible for C2 Funding

- Non-instructional facilities (NIFs) are not eligible for C2 funding/equipment that is specific to their building
- Shared equipment may be housed at a NIF
- For example:
 - A Wireless Controller may be housed within a NIF
 - Wireless Access Points in a NIF may not be purchased with E-Rate funds
 - These would be building-specific and not equipment that is shared with other schools



Category 2 Budget

Category 2 Basics

- To qualify for Category 2 funding, you must be CIPA-compliant
- We have a set 5-year cycle (FY2021-FY2025), (FY2026-FY2030), etc.
- All C2 budgets will reset in FY2026
- C2 budget is calculated at the library system level
- Multiplier is set for the full 5-year cycle and will not be adjusted for inflation each year
 - **FY2021-FY2025 = \$4.50 sq. ft. for ALL libraries**
 - **FY2021-FY2025 Budget Floor/Minimum = \$25,000.00**
 - *Budget floor applies to libraries with less than 5556 sq. ft.*

Calculating Your Budget – OPTIONS

- The Category 2 Order **provides 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 Libraries with **10 or less branches** – 3 options
 - OPTION 1: Calculate by total number of **Square Feet**
 - OPTION 2: Calculate by total number of **Branches** (\$25,000 per branch)
 - OPTION 3: Calculate BY Branch using either per sq. ft. or \$25,000 per branch or a **COMBINATION OF BOTH** methods
- **Use the HIGHEST aggregate total**

!! If applying for Category 2 funding, provide square footage for all library locations, even Bookmobiles & Kiosks!!

Sample Calculation for 10 or Less Libraries

ABC Library System has 5 locations:

Library	Sq. Ft.	Budget Calculation (\$4.50/sq. ft.)	Budget Received (Use minimum budget is calculation is less)
Central Main Branch	14,500	\$65,250.00	\$65,250.00
East Branch	8,000	\$36,000.00	\$36,000.00
North Branch	9,873	\$44,428.50	\$44,428.50
West Branch	5000	\$22,500.00	\$25,000.00
ABC Bookmobile	256	\$1,152.00	\$25,000.00
Totals	37,629	\$169,330.50	\$195,678.50

Based on sq. ft. count

Based on budget floor

- Remember, libraries with LESS THAN **5556 sq. ft.** are eligible for the budget floor - \$25,000.00
- **Use the HIGHEST aggregate total**

Category 2 Pre-Discount Budget Example

5-Year C2 Budget Cap*	E-Rate Discount	E-Rate Will Pay:	District's Share %	District Must Pay:
\$204,475	60%	\$122,685	40%	\$81,790

* The C2 Budget Cap is the **pre-discount price**. E-Rate discounts will then apply **on top of** the budget cap. In this example, library would still owe their 40% non-discounted share

- Future funding years: To determine what “**remains**” in a C2 budget for future years in the C2 “cycle”, take the 5-Year Budget Cap and subtract the pre-discount amounts of what has been “committed” in the previous year(s) of the C2 cycle

What is YOUR Remaining Category 2 Pre-Discount Budget for Current 2 Budget Cycle?

Calculating Remaining C2 Budgets – Using USAC’s Open Data

What is your remaining Category 2 Budget for this C2 cycle?

1) Go to: <https://opendata.usac.org/E-Rate/E-Rate-C2-Budget-Tool-FY2021-/8z69-hkn7>

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

3) Summary Table will appear

Review these columns:

Square
footage
currently in
EPC

5-Year
Pre-
Discount
C2 Budget

Filters (2) ✕
Clear All

State
OH ▼

Applicant Type
Select... ▼

City
Select... ▼

Billed Entity Name
Select... ▼

BEN
129999 ▼

Consulting Firm Name (CRN)
Select... ▼

Library... ⋮	School... ⋮	Library... ⋮	C2 Bud... ⋮	C2 Bud... ⋮	Funded... ⋮	Pendin... ⋮	Availab... ⋮
45,117	\$4.50	\$275,000.00	Confirmed	\$13,117.11	\$0.00	\$261,882.89	

“Funded” amount
from FY2021-
FY 2023

Amount of
“pending
FRNs” in FY
2021, 2022,
2023

Remaining
available
C2 Budget



E-Rate Application Process

Application Process Overview

E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - December
2) Update EPC Profiles - Admin Window	Oct - early January
3) Bid All New Services/Equipment – Form 470	Now - January
4) Bid Evaluation	January/February
5) Board Approval/Sign Contracts	January/February
6) Request E-Rate Funding – Form 471	Mid Jan. – March 25? (deadline TBA)
7) Application Review – PIA	March - August
8) Funding Commitment – FCDL	April - August
9) Turn-On Funding/CIPA Compliance – Form 486	FCDL receipt – October 29
10) Receive Services	July 1, 2024 – June 30, 2025
11) Pay Vendor	July 1, 2024 – June 30, 2025
12) Submit Invoice to USAC – Form 472 BEAR if paid vendor bill in full (vendor submits Form 474 SPI to USAC if you received discounted bills)	October 28, 2025 (deadline)

Step 1: Assess Need & Plan



- **When?** August - December
- **Category 1:** Review existing contracts to determine when they expire
 - Extend, if options are available
 - Must have documentation to vendor of request to extend
 - If contract expiring, decide if upgraded services are needed
- **Category 2:** Determine what equipment/wiring is needed for each school over the next 12 months
 - Research options, prepare bid-list

Step 2... Update Entities' Profiles

- **Update Entities' Profiles during the Administrative Window each fall**
 - 3 month period when schools must update enrollment/NSLP data for each school
 - And update Category 2 Enrollment if it has increased
 - Data cannot be changed once Admin Window closes (but you can provide updated info on the Form 471)
- Confirm all entities, including NIFs, are in EPC portal
 - Contact CSB at 888-203-8100 to make entity adjustments
- Libraries do not enter enrollment/NSLP data
 - EPC links libraries with the school district in which the library (or main library in a system) is located
 - Libraries should update square footage/address changes, if any



Step 3: Posting the Form 470

Form 470 Competitive Bidding Form

- Notifies vendors of services and equipment for which you are seeking proposals
 - All equipment/services for which you will seek funding on the Form 471 must have been posted on a Form 470
- Vendors are invited to submit bids/price quotes for 28 days from the date of certifying your Form 470
 - List **bid due date** in the narrative text box, along with **any disqualifying factors**
- You are NOT obligated to purchase any service/equipment listed on Form 470
- Category 1 and Category 2 can be filed on the same 470
- **Note:** If you were included on the OPLIN Omnibus Form 470 for circuits and award a contract, you do not need to file your own 470 for that service. **You will reference the OPLIN 470 number on the Form 471.**



When Must a Form 470 be Posted?

1. Month-to-Month Services

- No contract exists – these are mostly cable modem-type services
- File annually **unless using CABIO**


2. New Contracts

- File before signing any new contract
- If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2025, you are **not** required to file a Form 470 for FY 2024

3. Bandwidth Upgrades

- If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract

Contract Extensions:

- Permitted but must have been in original contract and must have definitive end date
 - For example, a 3-year contract, with two 1-year renewals. Will not require new 470 until the end of 5 years
 - **However, a 3-year contract that automatically renews doesn't count. This  requires a new 470 at the end of 3 years**
- Must notify the vendor before filing Form 471 if you want to exercise one of your contract extensions
 - Can be as simple as an e-mail; some vendors want contract amendment
 - USAC will ask for this during your application review

When to File the Form 470

Deadline: Form 470 must be posted online at least 29 days before the close of the Form 471 window

For example:

- If Form 471 deadline is March 25, 2024; then...
- February 25, 2024 = 470 Deadline
 - DO NOT wait this long!
 - Gives you 1 day to evaluate bids, negotiate contracts, seek board approval, sign contracts, and then file the Form 471 by the 471 deadline
- Helpful Form 470 Guides: <https://www.ohio-k12.help/erate/e-rate-resources/>
 - Form 470 Disqualification Suggestions
 - C1 & C2 Form 470 Filing Guide – Schools/District
 - C1 & C2 Form 470 Filing Guide –Libraries
 - Sample C1 & C2 Bid Matrix/Acceptance Letter

Requests for Proposals (RFPs)

- USAC considers any bidding document provided to vendors an RFP
- RFPs not required, except for:
 - All applicants seeking dark fiber or self-provisioned fiber projects
 - Libraries asking for hot spots/cellular data plan for bookmobile
- If issuing an RFP, all documents that constitute that RFP must be uploaded with Form 470 at the time of filing
 - Cannot cite a website bidding advertisement
 - **Important:** Any addenda or other documents given to vendors after the Form 470 is filed must be uploaded to existing 470
 - Must restart 28-day clock if any changes are made to the original RFP
- Vendors cannot provide RFP language or bid lists

Requests for Proposal (RFPs)

- A Requests for Proposal (RFP) may be created to describe specific needs and circumstances in more detail.

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

Cat 1

Equipment		Min. Quantity
UPS for Data Racks:		
APC PAC SMX3000L VNC Rack Tower LCO 100-127V	or Equivalent	8
APC Smart UPS X750VA	or Equivalent	4
Wifi Access Points and Antenna:		
Cisco Satalyst 9120AXE Wireless Acess Points, C9120AXE-B	or Equivalent	60
Cisco Antenna, AIR-ANT2535SDW-RS	or Equivalent	240
Cisco Universal AP Bracket, AIR-AP-BRACKET-2, UNSPSC 56112005	or Equivalent	60
Switches:		
C9200-24P-EDU	or Equivalent	4
C9200-48P-EDU	or Equivalent	2
C9300-48P-EDU	or Equivalent	3

Cat 2

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. If the equipment is different from what is requested, documentation must be provided with the proposal demonstrating that the proposed equipment is equivalent, or the proposal will not be considered.
- Hardware quoted must be new with the manufacturer's warranty (three year). Quotes for used equipment will not be considered.
- The bidder shall provide their SPIN in their proposal (or provide documentation that a SPIN has been applied for) and shall document that they are an authorized reseller of the equipment being proposed.
- Cabling vendors must be bonded/insured.
- Vendor must ensure that all quoted prices will be honored at the time of purchase.
- Vendors must conduct a mandatory 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. Bids received where a walk-through was not conducted will be disqualified.
- Vendors must conduct a mandatory walk-through of each location if bidding on the management of internal broadband services (MIBS). Bids received where a walk-through was not conducted will be disqualified.
- Installation costs must be listed separately from hardware costs.

Sample Disqualifying Factors

- Vendor must put in writing their willingness to give discounted bills.
- **SPAM and/or robotic responses will not be considered valid bid responses and will be disqualified from consideration.**
- Proposals from vendors on Red Light Status with the FCC or delinquent on a debt to a state or federal governmental agency or entity will be disqualified.
- In-state (or local) vendors preferred.
- Previous experience with vendor preferred.
- The applicant reserves the right to reject bids that are received after 9:00 a.m. of the Allowable Contract Date shown on the Form 470. **Or,**
 - The 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.
- All questions and quotes are to be emailed to **Insert Info**

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



During the Bidding Period...

- After the Form 470 has been posted online, vendors submit proposals directly to the school or library
- Proposals must be accepted for a minimum of 28 **calendar** days
 - **Applicants should specify a bid deadline in the Form 470/RFP**
 - Can be longer than 28 days
- Vendors will contact you if they need additional information
- When contacted by a vendor, you must indicate your willingness to receive a proposal for services listed on Form 470
 - **Do NOT say you are just going to stay with your current vendor**
- May conduct pre-bid meeting with vendors

Know Your Role


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.

Step 4: Evaluating Bids

- After the bid due date (which must be at least 29 days after 470 is posted), the applicant must review all qualified bids received for all services or equipment
- Must create and retain bid evaluation matrix
- **Price of eligible services/equipment MUST be the most heavily weighted factor during bid evaluation, but you're not required to go with the cheapest bid**
 - Brief list of evaluation criteria examples:
 - Quality of proposed solution
 - Cost of ineligible items
 - References
 - Experience with the vendor
 - Ability to meet installation deadline
- Retain all winning and losing bids and all correspondence between the applicant and all vendors (winning and losing)

Received No Bids?

- Document via an email or file memo that no bids were received
- Existing Services: can continue to receive services from existing service provider
- New Services/Procurement: Solicit bid from willing vendor **(who is not your brother-in-law)** 
 - Make sure price is cost-effective
 - Check marketplace options from other vendors in your area or nearby areas
 - Save research and information to justify buying service from this vendor

Bid Evaluation Sample

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
Pricing includes basic firewall service	15	0	0	15
Flexible Invoicing: FCC Forms 472 or 474	10	0	10	10
Local or in-state vendor	5	5	0	5
TOTAL	100	45	60	90

Based on the above bid matrix criteria, we have chosen **Vendor 3** as the service provider for our **bandwidth and Internet Access**.

Name: _____

Signature: _____

Date: _____

- Evaluate your bids using a matrix with your bid factors listed and assigned points.
- Price must have the highest number of points
- If a vendor was disqualified, they would not be included in the bid matrix table but give an explanation as to why they were disqualified.
- Based on this example, Vendor 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/>

Step 5: Vendor Contracts

- Contracts (which include hardware quotes) must be signed/dated by the **applicant** before you submit Form 471
 - Unless receiving services on a month-to-month basis
 - Vendor can sign after the Form 471 deadline
 - Obtain board approval, if required, before signing a vendor contract
 - **Or** write a letter of acceptance if board approval is not possible prior to the Form 471 deadline
 - Upload signed document in EPC prior to filing the Form 471



Step 6: Filing the Form 471

Purpose of the Form 471

- Filed **annually** by entity that actually pays the bills (the Billed Entity)
- Formally requests E-Rate funding commitments from USAC
- Asks detailed questions about services or equipment
- Shows which entities are receiving service
- Shows discount calculations (from EPC)
- Links to a Contract Record(s) to show which Form 470 was used to bid services, contract signing dates, contract amounts, etc.

Funding Requests

- Each separate funding request is assigned a number, called a Funding Request Number (FRN)
- Each FRN is “built” by adding FRN Line Items

When and How Many to File

- **471 Application Window: early January – mid March**
Do NOT miss this deadline!
- Must be filed in EPC
- Category 1 and Category 2 **must** be filed on separate applications
 - Multiple applications are ok within the same category of funding



Step 7: PIA Review

Program Integrity Assurance (PIA) Review

- USAC team that reviews all applications submitted within the “Form 471 Window” and makes determination on funding approval/reductions/denials
- Checks for rule compliance
 - Eligible services
 - Eligible entities
 - Appropriate discount level
 - Competitive bidding violations
 - Category 2 budget levels
- The 471 main contact will receive an email notification that PIA questions are pending in EPC about their application
- Applicants have 15 days to respond
 - Can seek a single, 1-week extension
- PIA will notify if they intend to deny or reduce request



Step 8: USAC Issues FCDL

FCDL = Funding Commitment Decision Letter

- Funding “waves” are released weekly
 - Goal is to have all “workable” applications funded by Sept 1
- FCDLs emailed to Form 471 contact and EPC AA
- Gives approval decisions for each funding requests (FRNs) on Form 471
- Can appeal within 60 days if you don’t agree with their decision
 - Appeal to USAC first
 - Can then appeal to the FCC if USAC denies



Step 9: Form 486



Form 486 Receipt of Services Form

- Informs USAC that services have (or will) **start**, and
- Informs USAC that your school or library is **CIPA** compliant
- Can only be filed after the FCDL has been issued
- No applicant or vendor reimbursement forms can be paid until the Form 486 has been submitted and approved
- Form 486 is **very** simple! Almost all data fields pre-populated

Deadline: 120 days after FCDL date or October 29, whichever is later

- Can be filed immediately after FCDL received, even before July 1
- USAC will deduct 1-month's funding for each month the form is late

CIPA Requirements

Any school or library receiving either anything under Category 2 or Internet access must...

- Filter all Internet access
- Have an Internet Safety Policy that addresses required elements
 - Policy must have been adopted after public hearing
- Schools' (not libraries) Internet Safety Policies must include "...
Educating minors about appropriate online behavior, including interacting with other individuals on social networking websites and in chat rooms and cyberbullying awareness and response."
 - This means that schools are required to teach online safety to students as a prerequisite to receiving E-Rate funding
- Recipients only receiving telecommunications services are exempt from E-Rate CIPA compliance
- Consortium members submit Form 479 to the consortium leader certifying compliance for the consortium lead to submit Form 486

Service/Equipment Delivery Timelines

- Category 1 services must be delivered between July 1 – June 30
 - Installation may occur as early as January 1 or the contract signing date, whichever is later
 - Services may not BEGIN until July 1
- C2 equipment has an 18-month window to purchase/install equipment
 - May be purchased/installed anytime after **April 1** (3 months before funding year begins)
 - Equipment must be purchased and installed by **September 30** (3 months after funding year is complete)

FY 2024 - Non-Recurring Services/Equipment Purchases - April 1, 2024 - Sept 30, 2025																	
FY 2024 - Recurring Services - July 1, 2024 - June 30, 2025																	
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2024	2024	2024	2024	2024	2024	2024	2024	2024	2025	2025	2025	2025	2025	2025	2025	2025	2025

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.
- For example, for recurring internet access service for FY2024, both the applicant and the service provider must retain all records until at least June 30, 2035.
- Retain receipt and delivery records relating to pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to your applications.



Paying for Equipment/Services

- Applicant's choice
 - **Discounts** on bills (vendor invoices USAC)
or
 - **Reimbursement** process (applicant pays bills in full, then invoices USAC)
- Must select one or the other for entire year for each FRN
- If you want discounted bills, notify your vendor after contract signing, as soon as you are funded
 - Vendors often have additional form to complete so they know exactly which option is selected, and which account # to discount
- Applicants always must pay their non-discounted share
- Rules require it will be paid within 90 days of receiving service/equipment



Reimbursement Method - BEAR

- If applicant pays the vendor invoice in full, applicant submits Form 472 – BEAR Form to USAC for reimbursement
- Must have ‘full-rights’ permission to file BEAR in EPC
- Calculated based on eligible charges on actual bills

Deadline:

- October 28 (following close of funding year) for recurring services;
- January 28 for non-recurring services/equipment
- Can request 1 extension if the request is submitted by the original invoice deadline



Reimbursement Method - BEAR

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



Discounted Bills Method - SPI

- Vendor applies E-Rate discounts to invoice(s)
- Vendor submits Form 474 SPI to USAC to seek reimbursement
- Applicants' responsibilities?
 - Notify the vendor you want discounted bills
 - Review invoices to ensure discounts are properly applied
 - File timely Form 486 so the vendor can invoice USAC



Timeline Checklist

E-Rate FY2024-25 Timeline Checklist

<i>Application Steps</i> <i>(Initial box when item completed)</i>	<i>Completed/</i> <i>Filed</i> <i>(applicant</i> <i>responsibility)</i>	<i>Notification</i> <i>Received</i> <i>(Posted in</i> <i>EPC Portal)</i>
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		

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



E-Rate Utilization Summary Chart

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

FY	Requested FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2	Total Committed	Total Disbursed	Remaining Balance
2023	2	2	1	\$132,173.06	\$86,106.02	\$46,067.04	\$132,173.06	\$0.00	\$132,173.06
2022	1	1	1	\$100,457.03	\$100,457.03	\$0.00	\$100,457.03	\$100,457.03	\$0.00
2021	1	1	1	\$100,457.03	\$100,457.03	\$0.00	\$100,457.03	\$100,457.03	\$0.00
2020	2	2	2	\$115,377.43	\$100,457.03	\$14,920.40	\$115,377.43	\$115,377.41	\$0.02

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

471	FRN	SPIN	Service Provider	Service*	Original Request	Current Commitment
221005399	2299005563	143001654	The Chillicothe Telephone Company	IA	\$4,849.20	\$4,849.20
221005399	2299005565	143001654	The Chillicothe Telephone Company	IA	\$39,852.00	\$39,852.00
221005399	2299005569	143001654				
221014219	2299017371	1430067				

471 Information

471#: 221005399

SPIN: [143001654](#) The Chillicothe Telephone Company

Service Type: Data Transmission and/or Internet Access

Status: Funded **Wave:** 1 **FCDL Date:** 4/23/2022

Status Memo: • MR1:Approved as submitted.

Service Start Date (471): 7/1/2022 **Service Start Date (486):** 7/1/2022

Current Commitment: \$4,849.20 **Payment Mode:** NOT SET

Disbursed Amount:* **Undisbursed:** 4849.20

Last Date of Service: **Last Date to Invoice:** 10/30/2023



What's New For FY2024?

FY 2024: What's New

- **School Bus Wi-Fi!**

- Approved by FCC, but no details yet; FCC Public Notice coming soon
- Unanswered questions – bidding, bus leasing, entity numbers for buses, other rules unclear
- Equipment - Cat 1 vs. Cat 2
- Form 470 and 471 are likely to change



- **Rural Urban Updates from 2020 US Census**

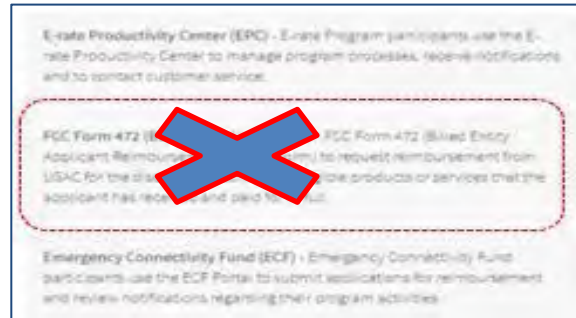
- USAC has just updated the U/R status in EPC profiles to reflect the updated status using the 2020 US Census
- ~ 200 entities' discounts decreased and ~ 300 entities' discounts increased
 - If you were impacted, you would have received an e-mail notification from USAC

- **BEAR Migration into EPC**

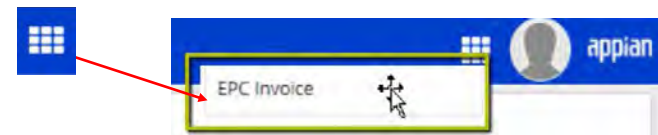
BEARs: Big Changes!

- As of November 7, 2023, USAC migrated the E-Rate BEAR functionality into EPC!

- The middle option into the legacy BEAR system is gone



- Now, when you log into EPC, you will see this grid (waffle) symbol in the upper right corner of the Landing Page which will take you to the new E-Rate BEAR Portal, or just click on “EPC E-Rate Invoicing” listed in the shortcuts.



- For a tutorial of the new BEAR system, visit: <https://www.usac.org/e-rate/applicant-process/invoicing/how-to-file-fcc-form-472-in-epc/>
- You'll note it looks almost identical to the ECF invoicing system

What Has Changed?

- Only AA can grant BEAR Access Permission, just like all other forms
- Tabs for Submitted Forms, Pending Tasks, Pending Inquiries
- Can enter multiple FRNs **and multiple SPINs** on the same BEAR
- Ability to upload vendor invoices with BEAR
 - Not required, but because USAC often requests these during invoicing review, it's a good idea to upload to save you time later (C2, mainly) and to have a record of it in the EPC system
- Real-time status reports by FRN Line Item:
 - Incomplete, Certified, Processed, Cancelled
- Ability to see the date BEAR was paid
- Better invoicing decision explanations
- Error checks
- All invoicing outreach and communications will be conducted through the portal (same as PIA reviews)
- **Note: Old BEAR data was not ported into new system**
 - **But** you can contact CSC for copies of old BEARs if needed



FY 2024: E-Rate Simplification

FCC Tribal Order Approved – July 2023:

- 10% Internet Access Hold Harmless
 - Up to 10% can be used for ineligible purposes
 - Important for schools with ineligible Pre-K students and CTCs that provide adult ed classes
 - Other usage during the school day
 - Applicants may seek E-Rate funding for **only** the amount of bandwidth needed for eligible use
- **Library** Bidding Exemption
 - Beginning in FY 2024, **libraries** are exempt from bidding Category 2 equipment or services if:
 - Total, pre-discount amount is \$3,600 or less
 - Total cost is per library and cannot be averaged over multiple libraries
 - Cost-effective rules still apply
 - Contracts still must be signed prior to filing the Form 471



FY 2024: E-Rate Simplification



Repeal of C2 NIF Cost Allocation Requirement for Shared Equipment:

- Applicants are not required to cost-allocate the non-instructional facility (NIF) usage of a shared piece of equipment in a NIF.
 - Such as a district switch or wireless controller located in an administrative building or data center.
 - Unfortunately, C2 equipment that is solely used by the NIF will continue to be ineligible (for example, WAPs in admin buildings)

Full Eligibility for Data Network Cabling:

- The FCC clarified that structured cabling in a school or library may be connected to ineligible equipment such as security cameras, voice equipment, smoke detectors, etc.
 - If network primarily served an eligible purpose (i.e., distributing broadband throughout a school or library building), the full cost of the cabling is eligible.
 - **However, networks that are dedicated to an ineligible purpose, such as security networks or voice networks, remain ineligible**



FCC – Further E-Rate Simplification?

FCC seeking comments on further streamlining measures (FNPRM):

- Multiple internet providers
 - Mid-year bandwidth increases
 - Multi-year discount validations
 - Basic maintenance simplification
 - Eliminating Form 486
 - Cardinal changes
 - Wiring between buildings
 - C2 bidding exemption for schools
-
- State E-Rate Coordinators' Alliance (SECA) Comments/Reply Comments:
Initial: <https://www.fcc.gov/ecfs/document/109260133305397/1>
Reply: <https://www.fcc.gov/ecfs/search/search-filings/filing/10231601816082>

E-Rate Looking Glass...

- Learning Without Limits Initiative
 - Just *proposals* for now, may be voted at Nov meeting
 - 3-year, \$200 million Cybersecurity Pilot (not in E-Rate)
 - Hotspot Lending Program in E-Rate (similar to ECF)
- Bidding Portal? Not yet!
- All E-Rate payments via SAM.gov
 - Effective no earlier than end of 2024
 - Once implemented, E-Rate reimbursements will not go to the bank account on Form 498
 - Form 498 will require UEI number which will link it to SAM.gov account
 - **Form 498 already collecting UEI if you update or create one new**
 - **SAM.gov requires annual renewal**



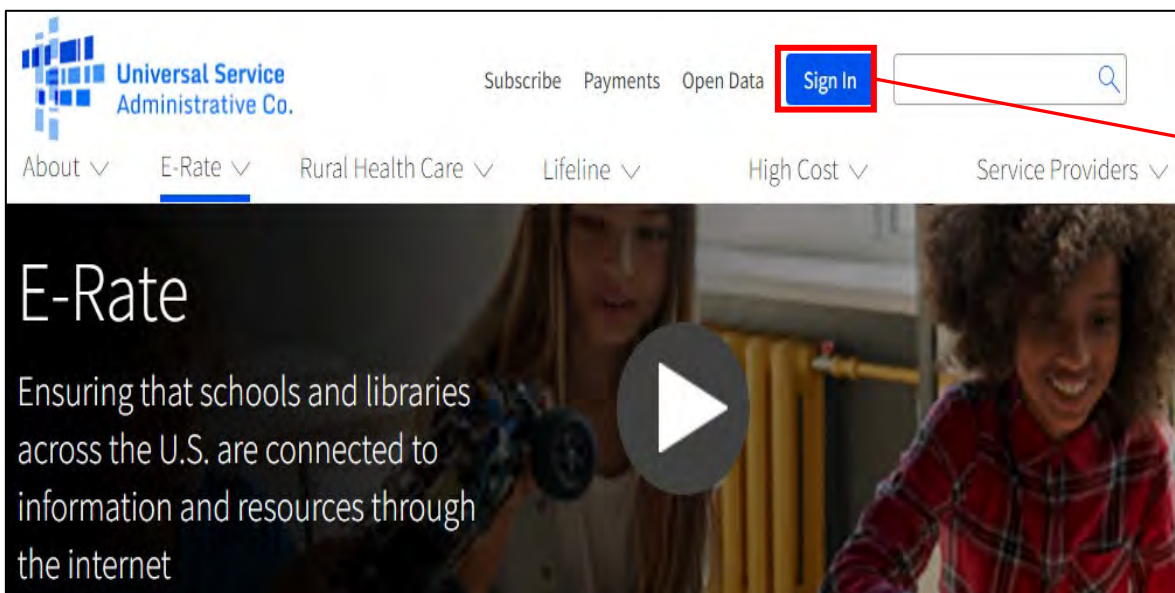
USAC's One Portal

USAC's One Portal

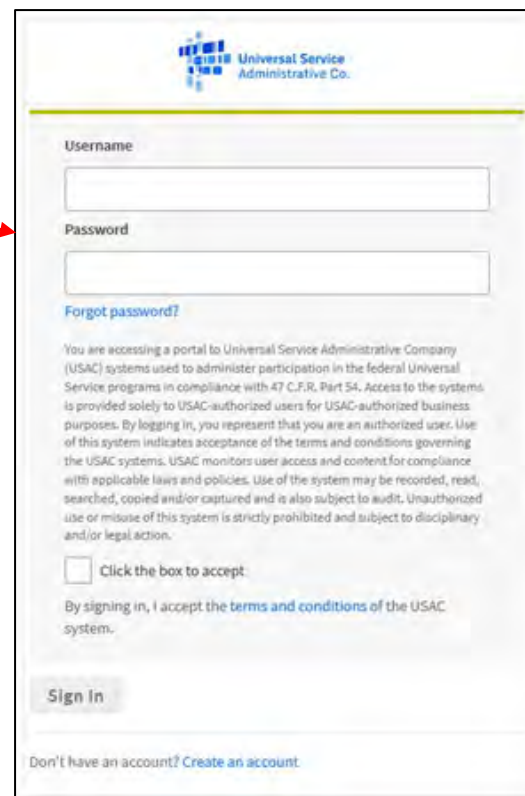
USAC uses multifactor authentication (MFA) to increase security.

We must log into One Portal to access the E-Rate Productivity Center (EPC) and ECF.

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



The screenshot shows the top navigation bar of the USAC website. The logo for Universal Service Administrative Co. is on the left. To its right are links for 'Subscribe', 'Payments', and 'Open Data'. The 'Sign In' button is highlighted with a red box, and a red arrow points from it to the right. Below the navigation bar are dropdown menus for 'About', 'E-Rate', 'Rural Health Care', 'Lifeline', 'High Cost', and 'Service Providers'. The main content area features a video player with a play button and the text: 'E-Rate Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet'.



The screenshot shows the login page for the USAC One Portal. At the top is the USAC logo and the text 'Universal Service Administrative Co.'. Below this are two input fields: 'Username' and 'Password'. A link for 'Forgot password?' is located below the password field. A paragraph of text explains the terms and conditions of the system. Below the text is a checkbox labeled 'Click the box to accept:'. Underneath the checkbox is the text: 'By signing in, I accept the terms and conditions of the USAC system.' At the bottom of the form is a 'Sign In' button. At the very bottom of the page, there is a link: 'Don't have an account? Create an account.'

USAC's One Portal

After entering the one-time verification code, you'll see both EPC and ECF (the legacy BEAR is no longer listed!).

The screenshot displays the USAC One Portal dashboard. At the top left, the logo for Universal Service Administrative Co. is visible. In the top right corner, there is a "Sign Out" button. The main heading is "Dashboard", and the user's email address, "lorrie.germann@gmail.com", is shown in the top right. A yellow notification banner at the top states: "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 sections: "Upcoming Dates" (with a calendar icon and the text "No upcoming dates found."), "Schools and Libraries" (with an upward arrow icon), and "Help?". The "Schools and Libraries" section contains two red-bordered boxes. The first box describes the E-rate Productivity Center (EPC), stating that E-rate Program participants use it to manage program processes, receive notifications, and contact customer service. The second box describes the Emergency Connectivity Fund (ECF), stating that ECF Portal participants use it to submit applications and review notifications, and that 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 includes a "Send us a message" link and a "Call us" number: (888) 641-8722.

Universal Service Administrative Co. Sign Out

Dashboard lorrie.germann@gmail.com

i 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.

Calendar Upcoming Dates
No upcoming dates found.

Schools and Libraries

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

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

Help?

Send us a message [Click here](#)

Call us
(888) 641-8722

EPC Entity Profile – Account Administrator

News Tasks (2) Records Reports Actions

My Applicant Landing Page

Training
Universal Service Administrative Co.

Welcome, [Independent School 714!](#)

Pending Inquiries

Type

Funding Year

Application/Request

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

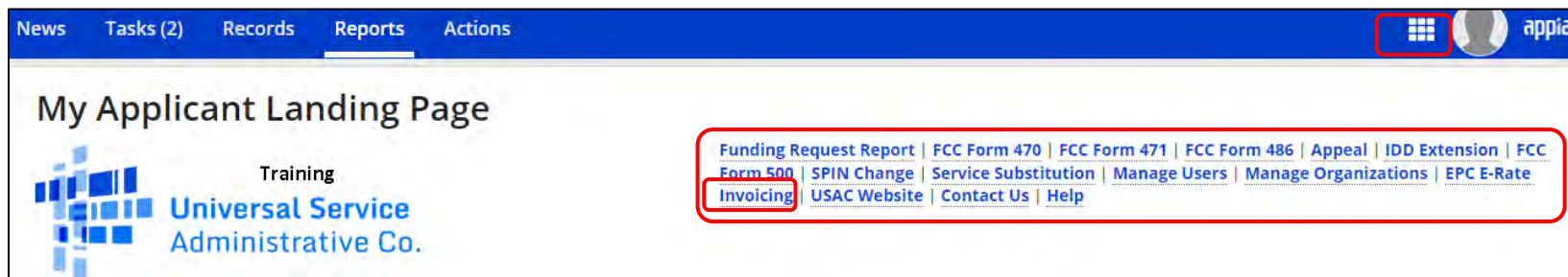
APPLY FILTERS CLEAR FILTERS

If logging in as the Account Administrator (AA), you will see the option to **Manage Users**, as the AA is the one user who can add, remove, or change a user's rights. **If it's missing, you do not have admin rights.**

Filing Program Forms

Notes on filing program forms

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



Form 498

- 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 and "Modify FCC Form 498"

My Landing Page



Notifications

Notification Type:

Funding Year:

Notification	Description	Issued Date
--------------	-------------	-------------

My Entities

Entity	Entity Number	City	State	Zip Code
ABC Library System	170	Springfield	OH	45501
ABC Main Library	171	Springfield	OH	45501
South Branch	172	Springfield	OH	45502
North Branch	173	Springfield	OH	45502

Account Administrator

Name Jane Doe

General Contact

Name Jane Doe

Applicant Information

Library System Sub-Type: Public Library System
 Private Library System

Category Two Budget Information

Sum of Square 22102

Footage of All Libraries in the System

Main Library Branch

County District Library - Main (Entity Number 17008809) Bellefontaine, OH

Billed Entity Detail Page

Click on the name of the Billed Entity (first in list) to see a summary of information, such as the name of the Account Admin and General Contact.

At the bottom of the page, the combined square footage of all branches is shown and used to calculate your Cat 2 budget.

“Related Actions” Menu

News Tasks (2) Records Reports Actions

Records Applicant Entities

#1979 - Library System 10344

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

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

Organization Details

Name Library System 10344
Entity Number 1979
FCC Registration Number 0123456789

Contact Information

Physical Address Address1
Rockville, MD 20850
Mailing Address Address1
Rockville, MD 20850

Account Administrator

Name FirstName LastName

General Contact

Name FirstName LastName

Applicant Type Libra
Status Acti
Phone Number 012-
Email libra
Website URL

- 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 the Landing Page, click on “News” on the blue menu bar, and then the USAC logo



that will appear just below the bar.

Category 2 Budget Tool

1

My Entities

Entity	Entity Number
ABC Library System	170
ABC Main Library	171
South Branch	172
North Branch	173

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

News Tasks (1) Records Reports Actions

Records: Applicant Entities

321456 ABC Library System

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

Category Two Budget Status

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

GET CATEGORY 2 BUDGET INFORMATION

2

3

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

Category Two Budget Status

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

▼2021 - 2025

▼2021 - 2022 (Budgeted Entity)

>Show column definitions

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

4

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

My Landing Page



Notifications

Notification Type

Funding Year

Notification	Description	Issued Date
--------------	-------------	-------------

My Entities

Entity	Entity Number	City	State	Zip Code
ABC Library System	170	Springfield	OH	45501
ABC Main Library	171	Springfield	OH	45501
South Branch	172			
North Branch	173			

Library Detail Page

Click on the name of each library, and then “Manage Organization”, to edit information pertaining to this building, such as square footage.

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

[Records / Applicant Entities](#)

#17011069 - ABC LIBRARY SYSTEM - OHIO COUNTY - Main

[Manage Organization](#)

[Manage Annexes](#)

Organization Details

Name	Ohio County Library	Applicant Type	Library
Entity Number	17011069	Status	Active
FCC Registration Number			

Contact Information

Physical Address	407 S 4TH ST OH 43952-2942	Phone Number	740-282-9782
Mailing Address	407 S 4TH ST OH 43952-2942	Email	
		Website URL	

Modify An Organization - Library Detail View

Modify An Organization

Name * NORTHWEST LIBRARY	Organization Type Applicant
Physical Address	Zip Code * 43235
Address Line 1 * 2280 HARD RD	Zip Code Extension
Address Line 2	Click the button below to get standard USPS address
City * COLUMBUS	County * Please select a County
State * OH	Please ensure that the address, city, state, and zip code are correct
	VERIFY MY ADDRESS
Latitude / Longitude	Latitude
User-entered Latitude	Longitude
User-entered Longitude	LOOKUP URBAN/RURAL STATUS
Urban/Rural	Urban/Rural Status
User Entered Urban/Rural Status * <input type="radio"/> Rural <input checked="" type="radio"/> Urban	<input type="radio"/> Rural <input type="radio"/> Urban Unable to determine your status. Please enter Urban/Rural manually in User-Entered field.
Mailing Address	
<input checked="" type="checkbox"/> Mailing address is the same as physical address.	
Address Line 1 2280 HARD RD	Zip Code 43235
Address Line 2	Zip Code Extension
City COLUMBUS	County
State OH	
Other Methods of Contact	
Phone Number * 614-645-2656	Phone Number Extension
Ex. 000-000-0000	
Email	
Website URL	

View after clicking on “Manage Organization”

From here, you can correct building addresses.

Modify An Organization - Main Library Detail View

Library Information

Library Sub-Type *

- Public Library
- Private Library

Check All That Apply

- Academic
- Research
- Tribal Library
- Bookmobile
- Kiosk
- New Construction Library
- Main Branch
- State Library Agency - Library

Is this library part of a library system?

Yes

Square Footage *

42446

Locale Code ⓘ

21

You will need to provide your square footage in order to apply for any Category 2 funding.

Enter Square Footage, and Locale Code if blank.

Verify Library information, and click on "Submit"

Associated School District

BEN	NAME	CITY	STATE	ZIP CODE
129000	Ohio Central School District	Any Town	OH	43085

If this library is no longer a main branch, please unselect the Main Branch Checkbox

Search for School Districts

BEN Search

Name Search

State Search

Zip Code Search

Please select a value

CLEAR FILTERS


SEARCH

FCC Registration Number ⓘ

CANCEL

SUBMIT

My Landing Page



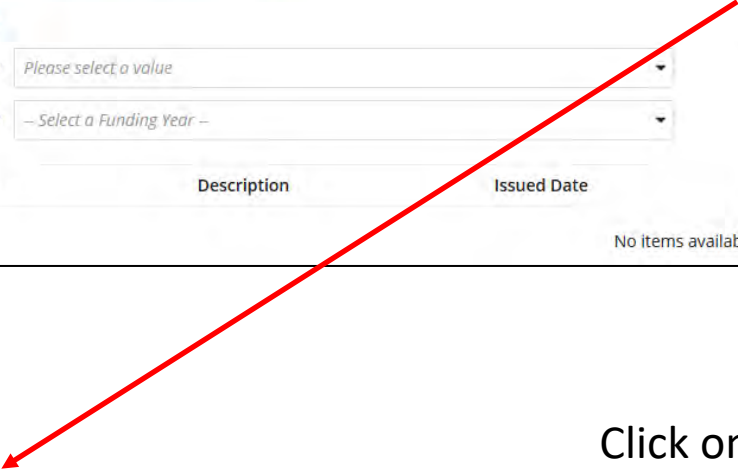
[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 471](#) | [FCC Form 486](#) | [Appeal](#) | [FCC Form 500](#) | [SPIN Change](#) | [Service Substitution](#) | **[Manage Users](#)** | [Manage Organizations](#) | [USAC Website](#) | [Contact Us](#) | [Help](#)

Notifications

Notification Type: *Please select a value* (dropdown)
Funding Year: *— Select a Funding Year —* (dropdown)

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 checked="" type="checkbox"/> ABC Library System	Springfield	OH



Creating New User

Create A User

User Details

User Type
Applicant

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

← 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.

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

Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
▼	View Only ▼	View Only ▼	View Only ▼	No Access ▼	View Only ▼	View Only ▼	View Only ▼

Cancel Continue

When done, click on "Continue"

Confirm New User

Confirm User Details

User Details

User Type: Applicant
First Name: Mary
Last Name: Jones
Middle Initial:
Job Title: Fiscal Officer
Phone Number: 740-555-1212
Phone Extension:
Email: mary.jones@abclibrary.org

Address

Address Line 1: 100 W. Main St.
Address Line 2:
City: Rockville
State: MD
County:
Zip Code: 45123
Zip Code Extension:
Apply All: 470 Permission: 471 Permission: 498 Permission: Post-Commitment Permission: 486 Permission: Appeals Permission:
Full Full School or Library Official Full 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 several emails prompting them to sign in to EPC, create a password, and accept the terms and conditions.

Note: The user must accept the terms and conditions before you can modify their role.

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.
- Post-Commitment Full and Partial rights user can start, complete, and submit Spin Change and Service Substitution requests. Post-Commitment View Only rights can view the submitted Spin Change and Service Substitution requests.

Name	Email	Apply All	470 Permission	471 Permission	BEAR/472 Permission	498 Permission	Post-Commitment Permission	486 Permission	Appeals Permission
Independent School 1 Admin 714	ind_sch_714_aa@testmail.usac.org	<input type="button" value="4"/>	Full	Full	Full	School or Library Official	Full	Full	Full

4. Click on the pull-down for each task to assign permissions or “Apply All”. Click on “Submit”.

Note: USAC has added the BEAR Form 472 Permission column to the EPC Users page

- USAC *attempted* to migrate all existing BEAR-authorized users in order to continue to file in the new system
- If that didn’t happen, or if someone wasn’t migrated, the AA will have to manually provide authorization to EPC user(s) for their organization

Modify Account Administrator

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

My Landing Page

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

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
ABC Library System	170	Springfield	OH	45501
ABC Main Library	171	Springfield	OH	45501
South Branch	172	Springfield	OH	45502
North Branch	173	Springfield	OH	45501

Records / Applicant Entities

#1979 - Library System 10344

Summary | Customer Service | Modifications | Additional Information | Discount Rate | Category Two Budget | 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.
- 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.

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 Library System 10344

Address Address1
Rockville, MD 20850

Mailing Address Address1
Rockville, MD 20850

FCC Registration Number 0123456789

Organization Type Applicant

Phone Number 012-345-6789

Email library_sys_10344@mailinator.com

Modify Account Administrator

Current Account Administrator
ls_user_10344@mailinator.com

Select a new Account Administrator *

<input type="checkbox"/>	First Name	Last Name	Email	Title
<input checked="" type="checkbox"/>	FirstName	LastName	ls_user_10344@mailinator.com	Training
<input type="checkbox"/>	Mary	Jones	mary.jones@abclibrary.org	Fiscal Officer

CANCEL **CONTINUE**



Questions?

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

***If you need a certificate for this training,
please send me an email.**