

# FY2024 E-Rate Form 471 Workshop

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# **Training Agenda**

- Filing Basics
- Accessing the EPC Portal
- Entering Contracts
- Filing the FCC Form 471
  - Cat 1 New Contract Funding Request
  - Cat 1 Month to Month Requests
  - Cat 1 Continuing Contract FRN
  - Cat 2 Internal Connections
- Next Steps

# Filing Basics

# **Purpose of Form 471**

#### The FCC Form 471

- is filed to request discounts on eligible services.
- must be filed every year.
- must reference services that were competitively bid with an FCC Form 470 for at least 28 days, or after a request for proposal (RFP) is made publicly available, whichever is later. (Verify Allowable Contract Date posted on Form 470)
- may reference an FCC Form 470 posted in a prior funding year where such a form resulted in a multi-year contract.
- must be filed after executing contracts for contracted services, if applicable, or selecting your service provider for tariffed or month-to-month services.

#### When to File FCC Form 471

- The FCC Form 471 must be filed during a specific application window each year.
- All materials associated with the FCC Form 471 must be filed by 11:59 PM ET on or before the last day of the FCC Form 471 application filing window for the request to be considered as inside the window.
  - Form 471 Filing window:
    - Opened January 17<sup>th</sup>, 2024 (Noon EST)
    - Closes March 27<sup>th</sup>, 2024 (11:59 pm EDT)
  - Last date to file a Form 470 February 28<sup>th</sup>, 2023
     (11:59 pm EST)

# Filing FCC Form 471

- You must complete and submit the FCC Form 471 by filing the form online in EPC.
- You may file more than one FCC Form 471
  - Note: you must file separate applications for Category One
     (Data Transmission and/or Internet Access) and Category
     Two (Internal Connections, Managed Internal Broadband
     Services, and/or Basic Maintenance of Internal
     Connections).

# **Prerequisites**

#### Entity Profile

- The values in your applicant entity's profile had to be updated by Jan.
   12<sup>th</sup>. If you find that a correction or change is needed, you may note the information on the Form 471 in the narrative of each funding request and make a RAL correction.
- The full-time enrollment and NLSP counts of the school district served by the main library location are used to calculate your discount in the EPC system.

#### Contracts

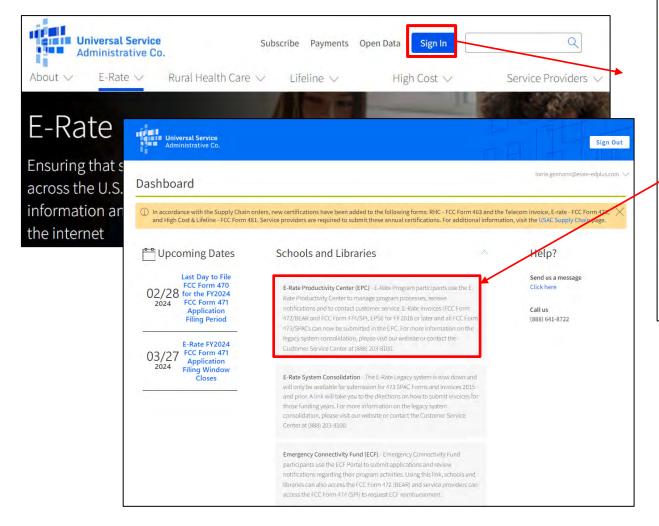
 Before you begin your application, upload contracts that you will be associating with Funding Request Numbers (FRNs) in your entity's profile, if not already in EPC.

# Accessing the EPC Portal

#### **USAC's One Portal**

Log into One Portal to access the E-Rate Productivity Center (EPC) To access, go to <a href="https://www.usac.org/e-rate/">https://www.usac.org/e-rate/</a> and click on "Sign In"

and then "Continue".



Usernam	e
Passwor	1
Forgot pa	issword?
(USAC) sys Service provides purposes, of this syst the USAC s with appli- searched, use or mis and/or leg	cassing a portal to Universal Service Administrative Company terms used to administer participation in the federal Universal agrams in compiliance with 47 C.F.R. Part 54. Access to the systems solely to USAC-authorized users for USAC-authorized business by logging in; you represent that you are an authorized user. More em indicates acceptance of the terms and conditions governing ystems. USAC monitors user access and content for compliance to be provided to the property of the system may be recorded, read, copied antifor captured and is also subject to modif. Unauthorized are of this system is strictly prohibited and subject to disciplinary all action.  K the box to accept.
	g in, I accept the terms and conditions of the USAC

#### **Landing Page View**

Click on "USAC" logo to return to Landing Page.

Make sure all your entities are listed\*. The Library's Billed Entity Number will be listed first.

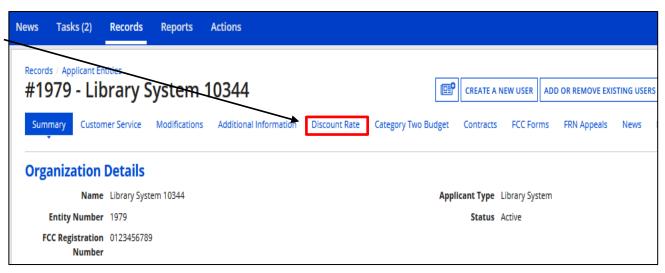
Click on the name of your Billed Entity to open the Organization Details page.

the state of the s	<b>/ersal Servio</b> ninistrative (	ce	Form 500   SI	iest Report   FCC Form 47/ IN Change   Service Subsi ntact Us   Help				
Pending Inquir	ies							
Туре	– Select a Type +		13	Application/Request	- Enter an App	lication/Reques	t ID dr Nickname	
Funding Year	- Salect a Funding Ve	ear –	.*				APPLY FILTERS	CLEAR FILTERS
Pending COMAD Inquiries	are not included.							
Application/Request N	umber	Туре	Nickname Inquiry Name	Outreach Type	Date Sent	Due Date	† Extn.	Status
Notifications  Notification Type  Funding Year	Please select a value Select a Funding \( \)	ease select a value ▼ Select a Funding Year — ▼			Generated			
Notification		Description	Issued Date	Generated	Ву		Generated On	
My Entities			No iten	ns available				
Entity			Entity Number	City		State	Zip Code	
Library System 10344			1979	Rockville		MD	20850	
Library 1 In System 10	344		3313	Rockville		MD	20850	
Library 2 In System 10	344		3314	Rockville		MD	20850	

\*If there is an entity missing in the list, contact USAC to request an entity number. However, with the close of the Admin Window, the entity will not be listed in EPC until after the close of the Form 471 Window.

#### **Seeing The Library's Discount %**

Click on "Discount Rate".



Discount rates for Cat 1 and Cat 2 are listed.

Requested Discount Rate - Library System 10344 (BEN: 1979) - FY2022  More than 50 percent of your library outlets/branches must be rural for the library system to be considered rural.  This discount rate has not been approved for the current year							
Associated School District Full-time Enrollment	Associated School District NSLP Count	Associated School District NSLP Percentage	Library System Urban/Rural Status	Category One Discount Rate	Category Two Discount Rate		
100	100	100%	Rural	90%	85%		
SHOW ADDITIONAL INFORMATION							

Displayed at the bottom of the "Summary" page is the total square footage that

has been provided in the portal:

#### **Category 2 Budget**

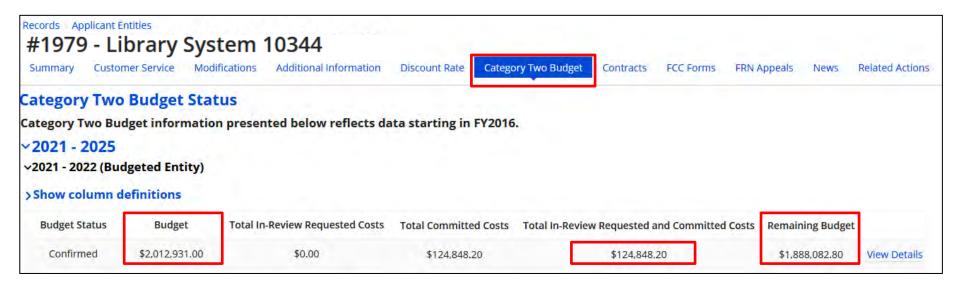
Displayed at the bottom of the "Summary" page is the total square footage that has been provided in the portal:

Category Two Budget Information

Sum of Square 62844

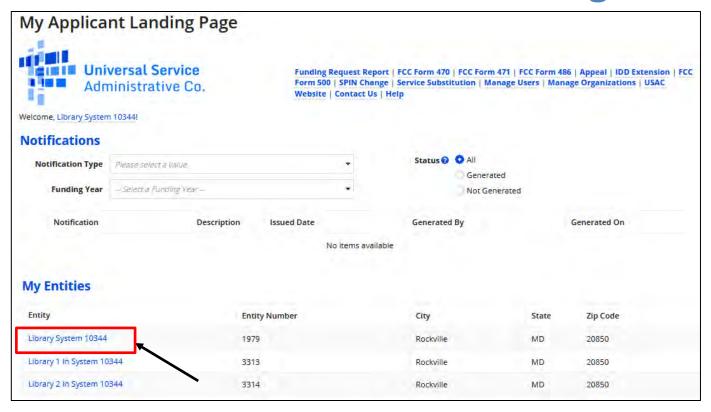
Footage of All
Libraries in the
System

Click on "Category Two Budget" to see what's been used to date, and the remaining balance.



# **Entering Contracts**

#### **Manage Contracts**

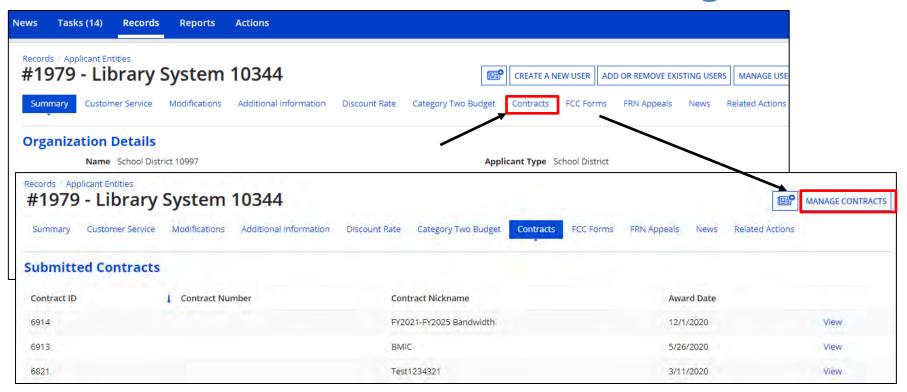


You will be required to associate contracts with each FRN when requesting a contracted service. You should complete this **before** you begin the Form 471.

 Remember, this may be a formal contract, or a copy of a hardware quote that has been signed/dated

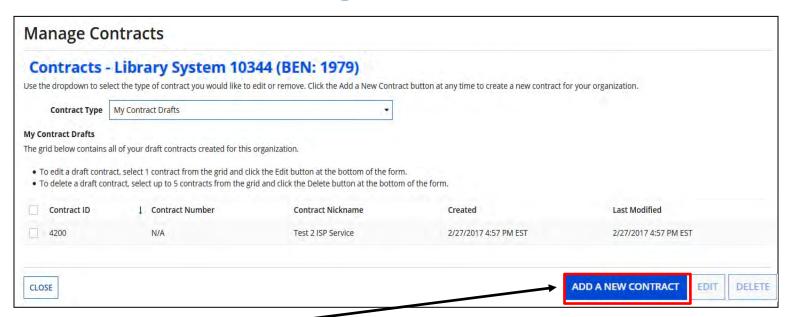
From your Landing Page, click on your organization (Billed Entity) from the "My Entities" section to display the organization dashboard.

#### **Manage Contracts**



Click on "Contracts", and then "Manage Contracts" to add new contracts. To see previously uploaded contracts, click on "View". **Note:** Once a contract has been added, you cannot edit the information, or delete it. If a mistake is found, you will have to add the contract again and reenter the accompanying information.

## Manage Contracts – Add New Contract

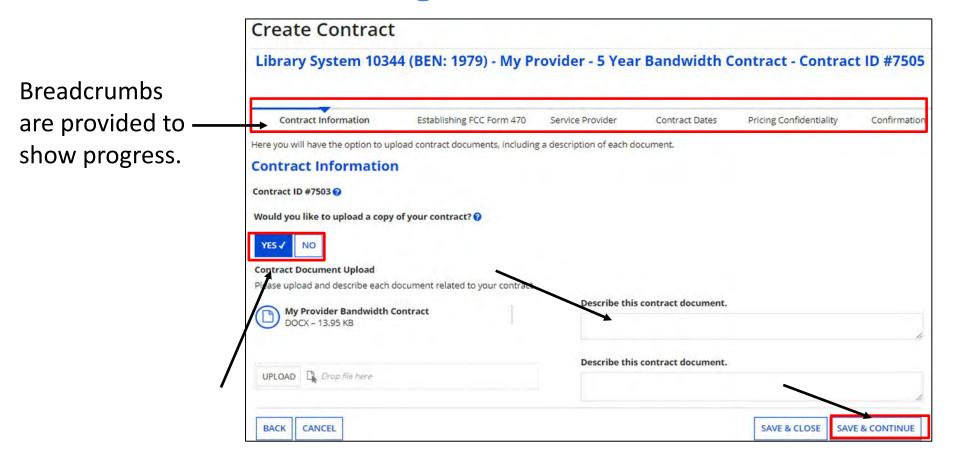


Begin by clicking on "Add New Contract".

Enter a nickname and contract number if known, click on "Save & Continue".

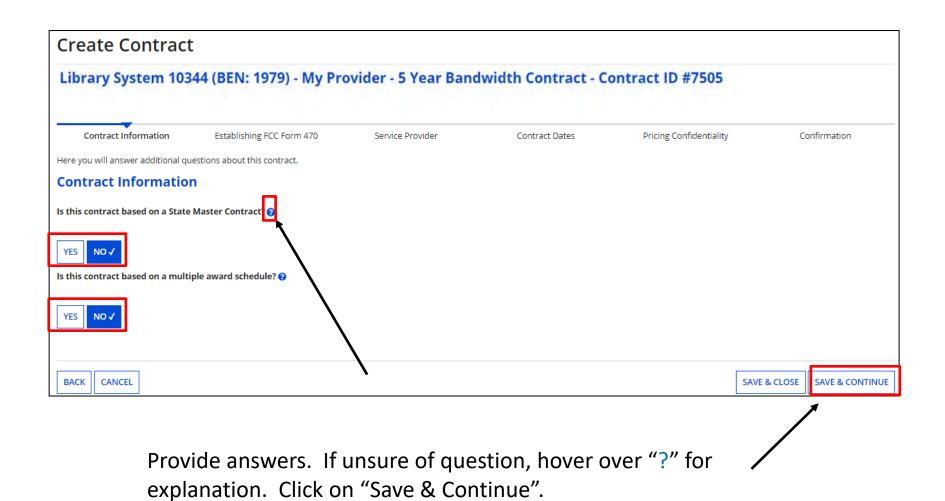
**Note:** if you need to stop before completing, click on "Save & Close".





To upload a copy of the contract, choose "Yes" and upload the file. Enter a description of the document if you choose. You may add multiple documents if you choose. When done, click on "Save & Continue".

\*Note: If you have an existing contract that has addendums, it is recommended that you include all items as a single document. This also includes letters memorializing a purchasing decision if the contract was signed at a later date.





Select the contract Piggy Back options. (The second question doesn't appear until you answer the 1<sup>st</sup> one.) Click on "Save & Continue".

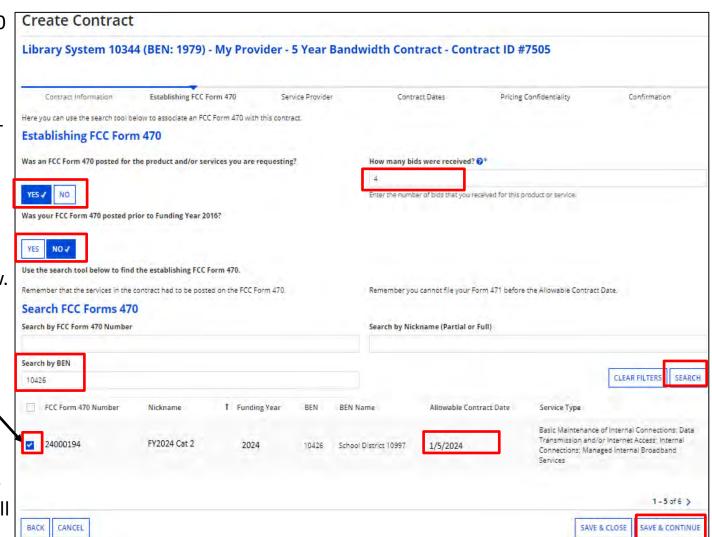
Enter the number of bids received.

Choose "Yes" if a Form 470 was filed and indicate if it was done prior to FY2016.

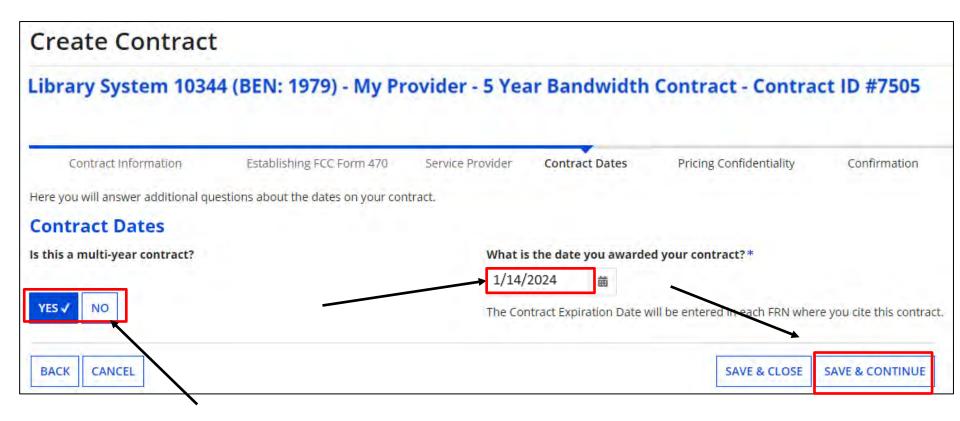
If you are using a FY2016 – FY2024 Form 470, you can search the portal for the form. Enter your search criteria if not searching by BEN and click on "Search". Results will be listed below.

Check the box to select, and click on "Save & Continue"

Note: "Allowable Contract Date" is shown. If you choose a 470 that's before the allowable date, you will receive an error message



**Create Contract** Library System 10344 (BEN: 1979) - My Provider - 5 Year Bandwidth Contract - Contract ID #7505 Contract Information Establishing FCC Form 470 Service Provider Pricing Confidentiality Confirmation Contract Dates **Enter Account** Here you will associate the service provider listed on the contract. Number if known, **Service Provider** but not required Account Number (e.g., billed telephone number) If your service provider has given you one or more Account Numbers, please enter them. Please select the service provider for this contract using the search below. Enter search Search Service Providers criteria for Service Search by SPIN Search by Name (Full or Partial) Provider by SPIN or 14010001 name, click on CLEAR FILTERS SEARCH "Search". SPIN Name Doing Business As State 14010001 USAC Service Provider Organization 1 VA Check box to select. click on "Save & Continue" BACK CANCEL SAVE & CLOSE **SAVE & CONTINUE** 



Indicate if this is a multi-year contract and enter the date the contract was awarded.

\*\*Remember, the date must be **on or after** the Allowable Contract Date listed on the Form 470. The Contract Expiration Date will be entered later in the FRN on the Form 471.

Click on "Save & Continue".



Indicate if voluntary extensions are allowed. If so, provide the contract expiration date if all extensions are exercised, the number of extensions left on the contract, and the total remaining length of the contract if you exercise all extensions.

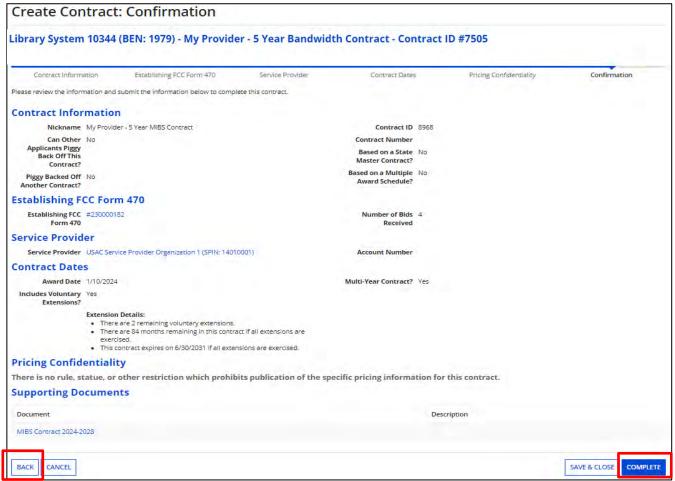
23



Indicate if there is a restriction prohibiting publication of the pricing for this contract. If "Yes", you must state the type of restriction (State Law, Local Rule, Court Order, Contract with Restrictive Terms), and upload Restriction Document.

Click on "Save & Continue".

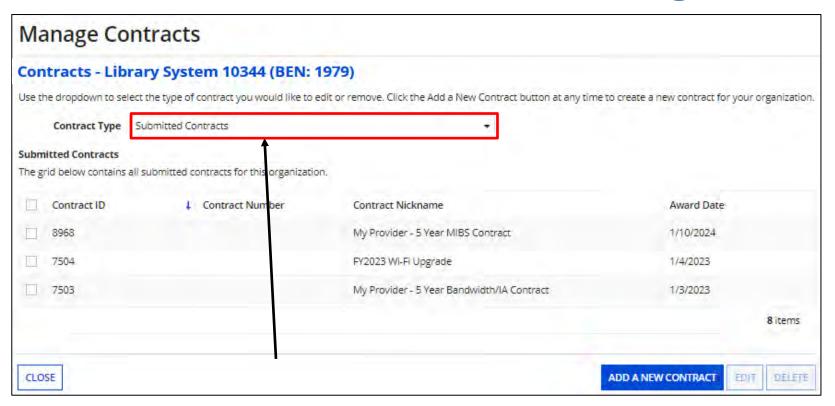
# Manage Contracts – Create Contract (Confirmation)



If an error is found, click on "Back" and correct it.

If the information is correct, click on "Complete". Keep in mind that if a mistake is found after it's submitted, you can not edit it. You will have to create a new contract record.

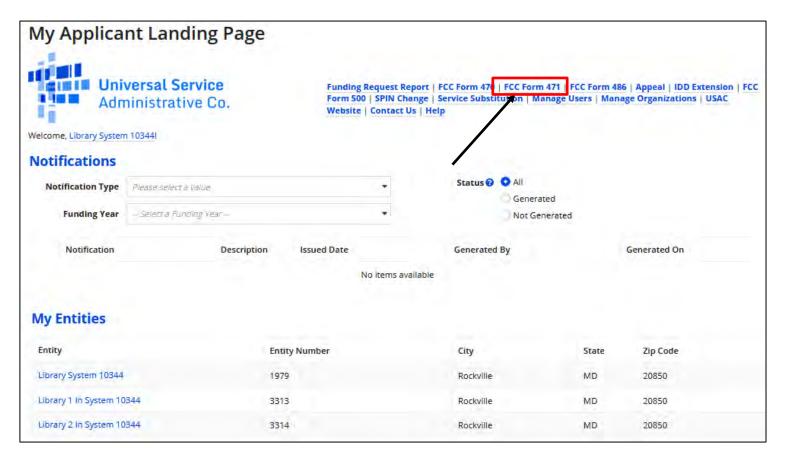
#### **Manage Contracts**



To see contracts you've added, go back to "Manage Contracts" as before. Click on the pull-down and choose "Submitted Contracts".

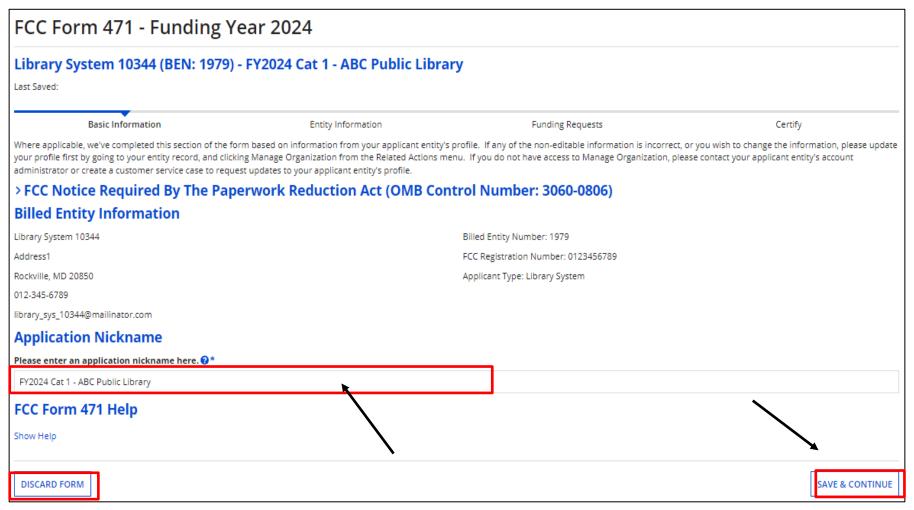
If you started adding a contract but had to "Save & Close" before completing it, click on "Manage Contracts", and choose "My Contract Drafts" as the contract type. Select the contract from the grid and click on "Edit" to continue.

Remember, you will need to complete the steps for each contracted service.



From the Landing Page, click on "FCC Form 471".

**Note:** When you begin the FCC Form 471, the basic information about your Billed Entity will be automatically populated from your profile. If you did not update your entity profiles by the Jan. 12<sup>th</sup> deadline, your FY2023 data will be displayed.

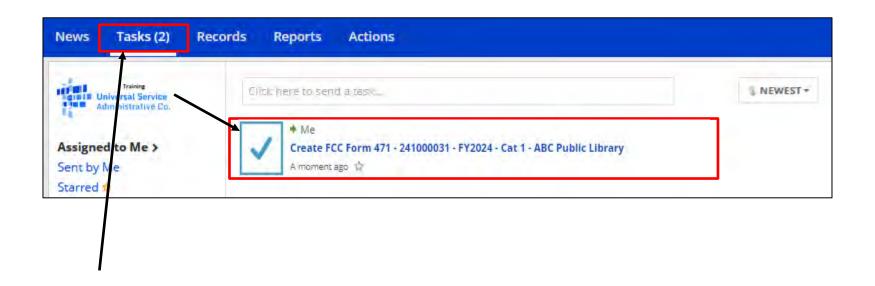


Enter an application nickname and click on "Save & Continue".

As before, breadcrumbs are listed at the top, and required fields are indicated by \*.

You also have the option to "Discard Form" to discard your work. Once you confirm that you want to discard the form, it will no longer be available in the EPC system. 29

#### **Continuing a Form 471**



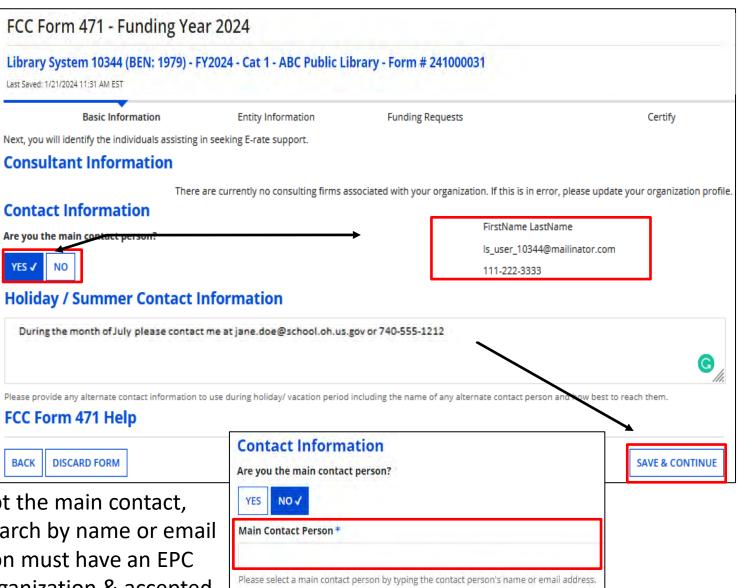
If, after completing part of the form, you need to stop and return to it later:

- Click the "Save & Continue" button to save the page and then log out of EPC or click on any menu option to exit.
- Click the "Task" tab to locate the in-process form when you return to EPC.

Please note: the task is named "Create Form 471" instead of "Continue". However, you will be taken to the screen in the application where you left off.

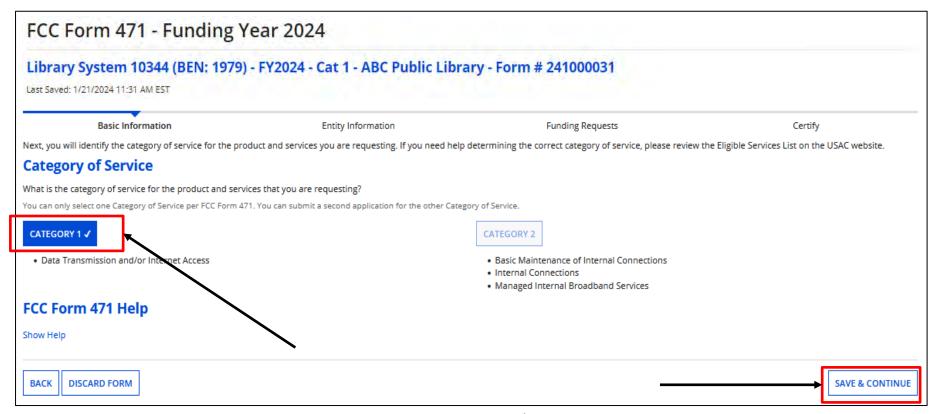
Choose "Yes" if you are the main contact, and your information will be displayed.

Provide "Holiday / Summer" contact information if appropriate, and click on "Save & Continue"



**Note:** If you are not the main contact, select "No" and search by name or email address. The person must have an EPC account for this organization & accepted the Terms & Conditions to be added.

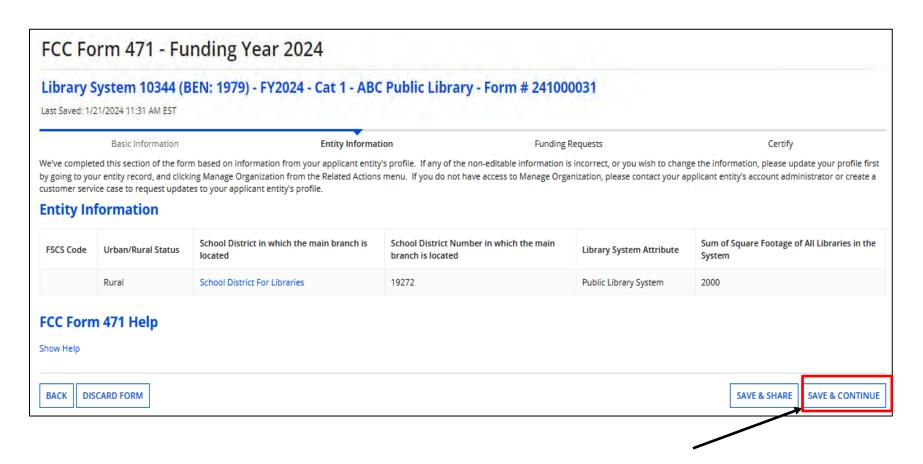
#### **Choosing Category of Service**



Choose the "Category of Service" for the products/services you are requesting on this Form 471.

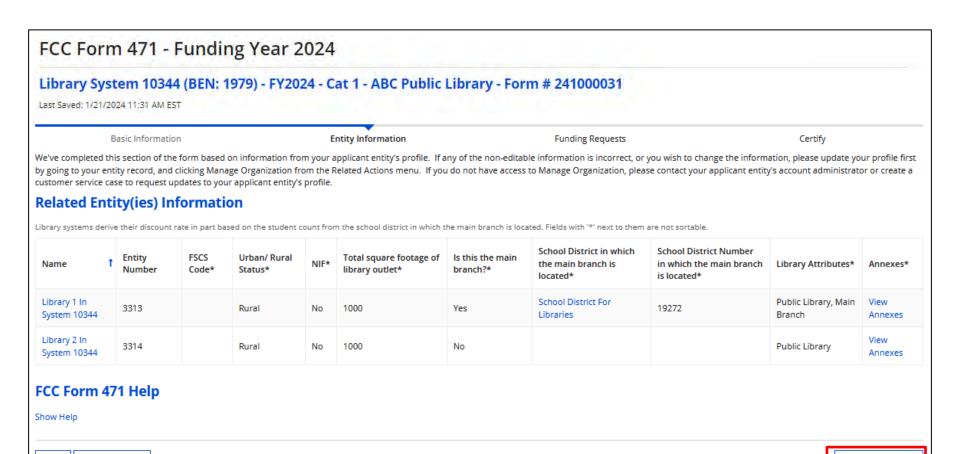
Remember, you must select Category 1 **OR** Category 2. You **cannot** select both on the same Form 471. Also, once you click "Save & Continue", you **cannot** change the selected category for this application.

#### **Entity Information**



This portion of the form populates, and displays information based on your entity's profile. Click on "Save & Continue"

#### **Related Entity Information**



View "Related Entity Information".

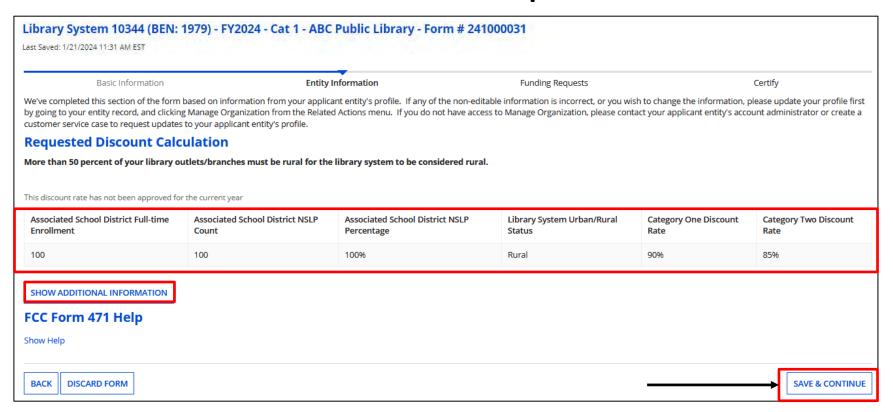
**BACK** 

DISCARD FORM

Click on "Save & Continue".

**SAVE & CONTINUE** 

#### **Requested Discount Calculation**



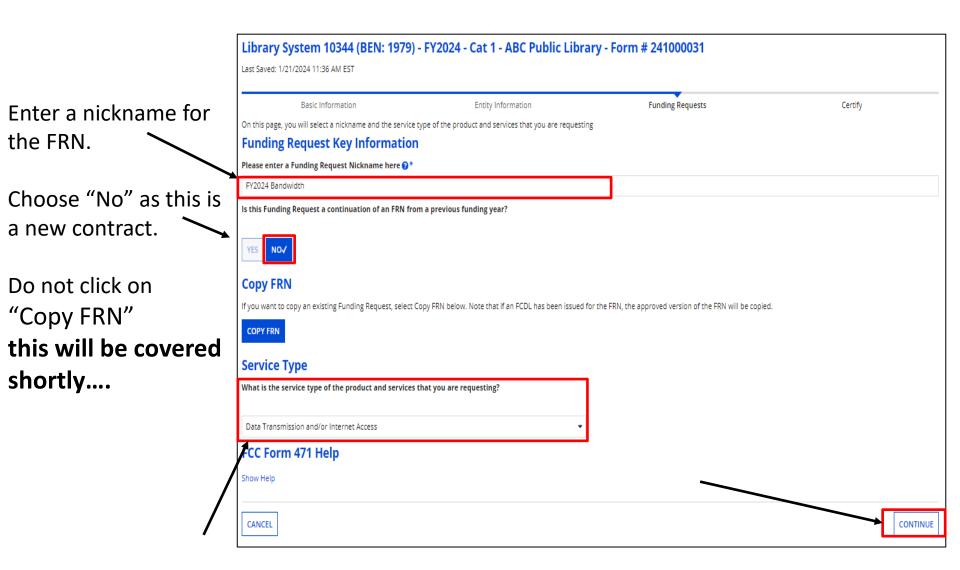
Discount Calculation shown based on your entity's profile. To see a list of all entities, click on "Show Additional Information". When done, click on "Save & Continue" to start adding funding requests.

#### Funding Requests – Part 1

FC	C Form 471	- Funding	/ear 2024		
	rary System 10 Saved: 1/21/2024 11:31 A		) - FY2024 - Cat 1 - ABC Public Library - F	orm # 241000031	
	Basic Infor	mation	Entity Information	Funding Requests	Certify
	oage displays all of the funding Requests		application. From here you can create a new FRN, or edit, delete,	or manage the line items of an existing one.	
To cre	eate or update specific FRN	Line Item(s), please click	on the FRN number hyperlink.		
	FRN ↓	Nickname	Number of FRN Line Items		FRN Calculation
			You haven't created any Funding Requests (FRNs) yet. Click the	"Add FRN" button to start creating your first	EDIT FRN REMOVE FRN MANAGE FRN LINE ITEMS
Show		p	Click on "Add F	RN" to begin	SAVE & SHARE REVIEW FCC FORM 471

Note: "Part 1" is where we indicate how we're purchasing and associate a contract if appropriate. "Part 2" is where we provide bandwidth info, the connection type, cost, and who's using the service.

# Funding Requests – Part 1

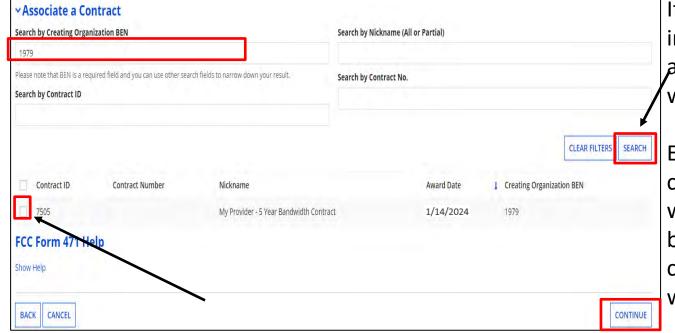


"Data Transmission and/or Internet Access" auto-populates, click on "Continue"

# Funding Requests - Part 1

Choose how the services will be purchased and click on "Continue".

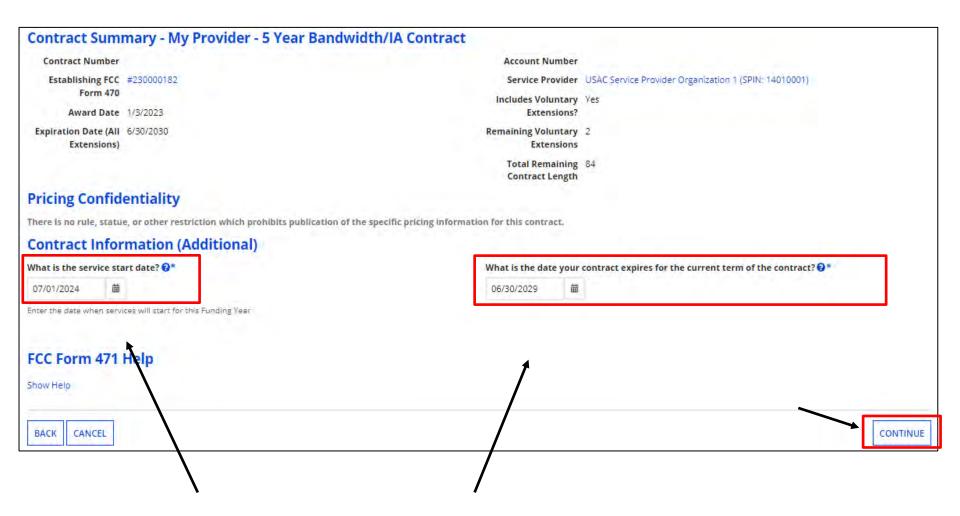




If "Contract" was indicated, search for the associated contract that was uploaded previously.

Enter search criteria and click on "Search". Results will be listed in a grid below. Click box to select contract. The summary will display below.

# **Contract Summary**

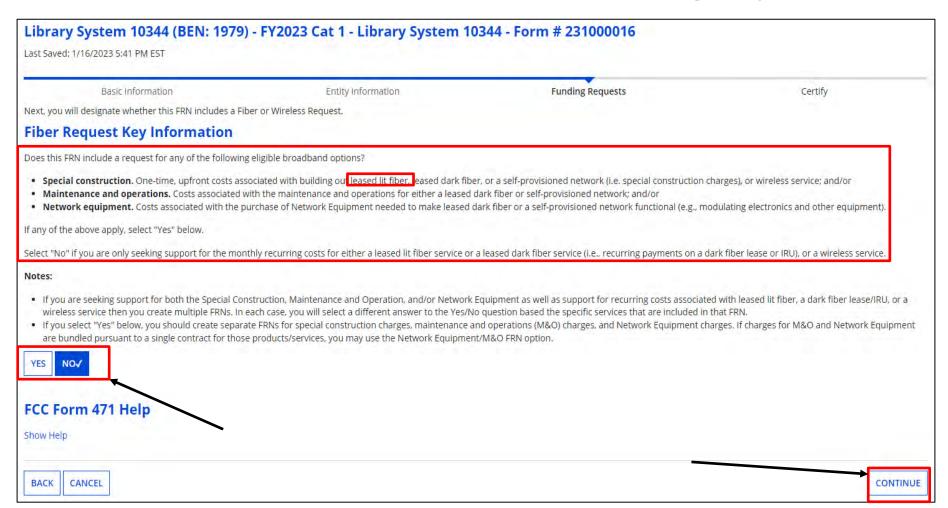


Verify the service start date; that's auto-populated. The default is 07/01/2024 for the upcoming funding year.

Enter the date the contract expires for the current term of the contract, <u>not including</u> extensions.

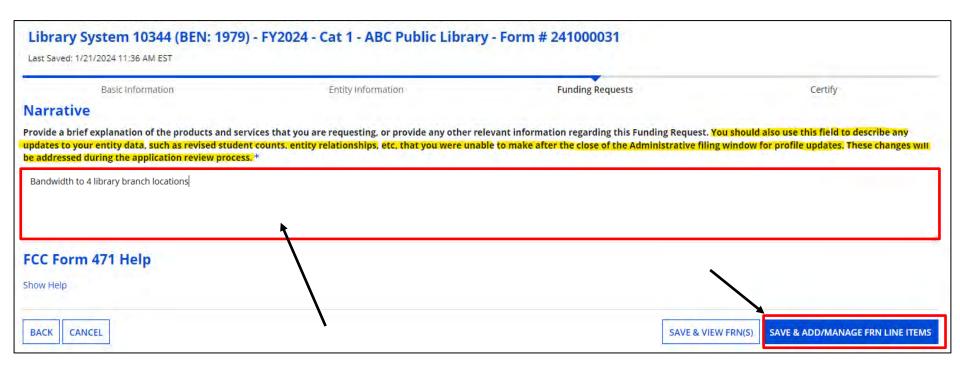
Once completed, click on "Continue"

# Funding Requests – Part 1



Indicate whether this FRN includes any of the options listed above. If not, select "No" and click on "Continue"

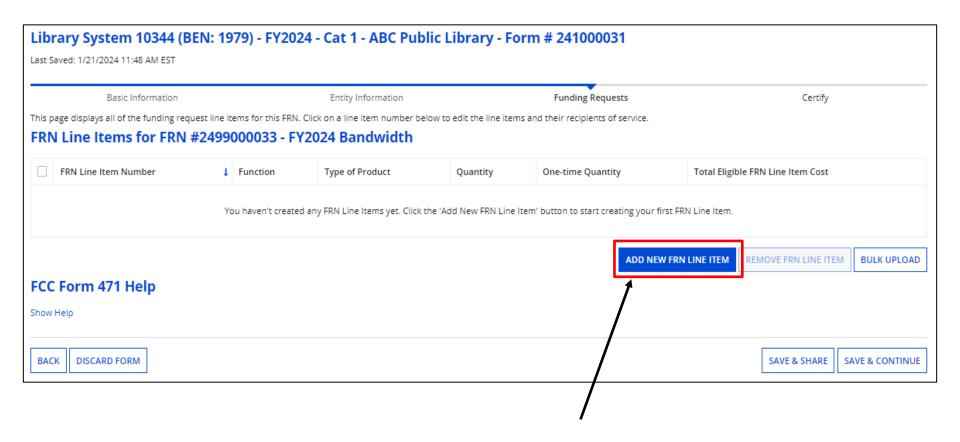
# **Funding Request Narrative**



Provide a brief description of the products and services you are requesting. Note: if you added a new entity and they'll be receiving service, but it's not listed in EPC yet, provide the name and entity number in the narrative and explain they will receive service also. You can also provide corrected addresses if needed.

Click on "SAVER ADDIMANAGE FIRM LINE ITEMS" to begin "Part 2" entering the **key information for** your funding request.

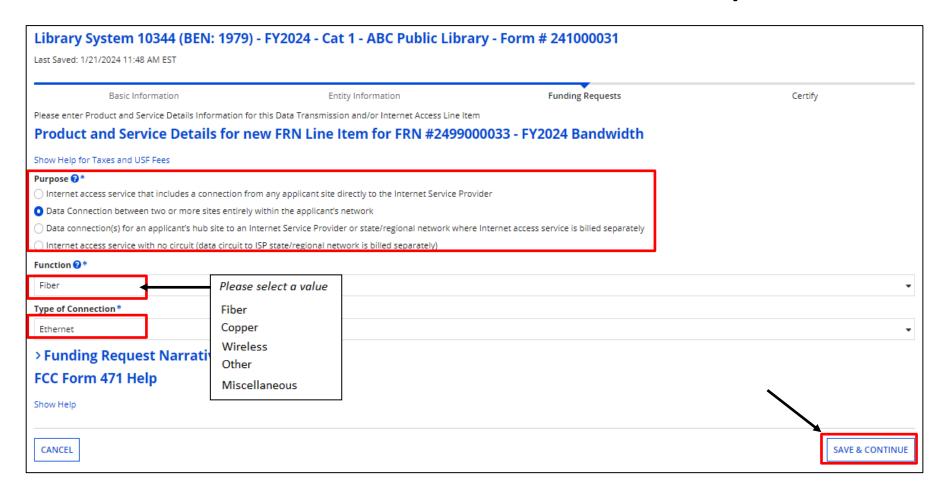
# **Adding FRN Line Items**



Click on "Add New FRN Line Item".

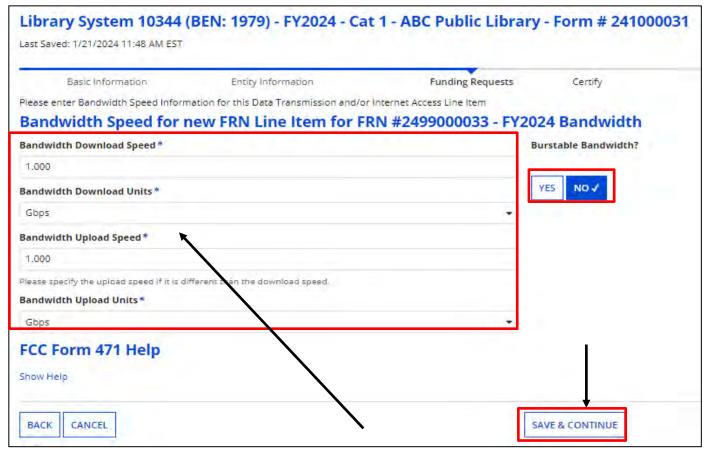
Keep in mind, an FRN may have several line items that make up the total funding request, depending on the products or services you are purchasing.

# **Product/Service Details**



Select the "Purpose", "Functions", and "Type of Connection" then click on "Save & Continue". **Note:** if this is a circuit connecting a branch location to your main library, choose the second "Purpose". If it's service directly to the branch from the ISP, choose the first one.

# **Bandwidth Speeds**

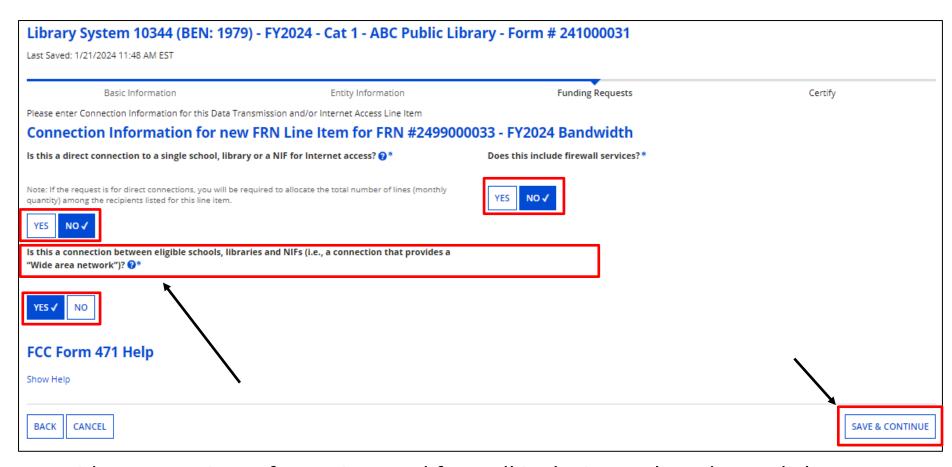


Enter Bandwidth Speed Information, indicating if the bandwidth is burstable, then click on "Continue".

Note: Depending on the "Function" and "Type Connection" you chose previously, the bandwidth information may be populated for you.

Again, if you are unsure of the information, contact your Service Provider

#### **Connection Information**



Provide Connection Information, and firewall inclusion. When done, click on "Continue".

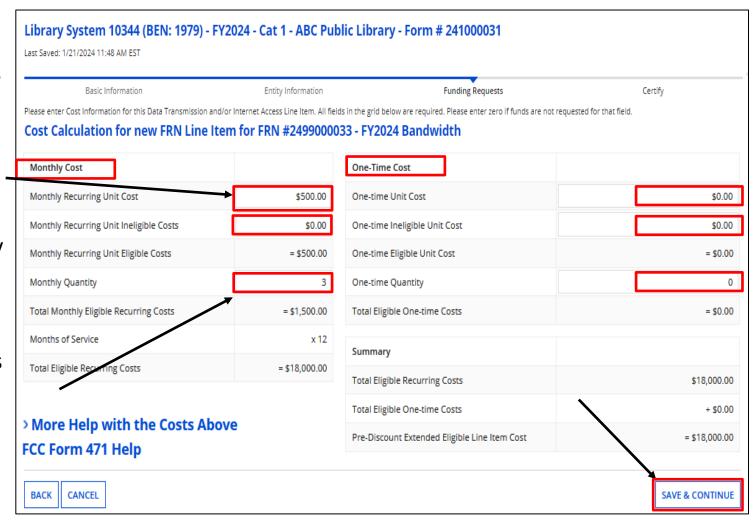
**Note:** The system will not allow you to answer "Yes" to both questions displayed on the left-hand side above. If you do, you will receive an error message.

#### **Cost Calculations**

Enter cost information. Fields cannot be left blank. If there is no cost, enter zero.

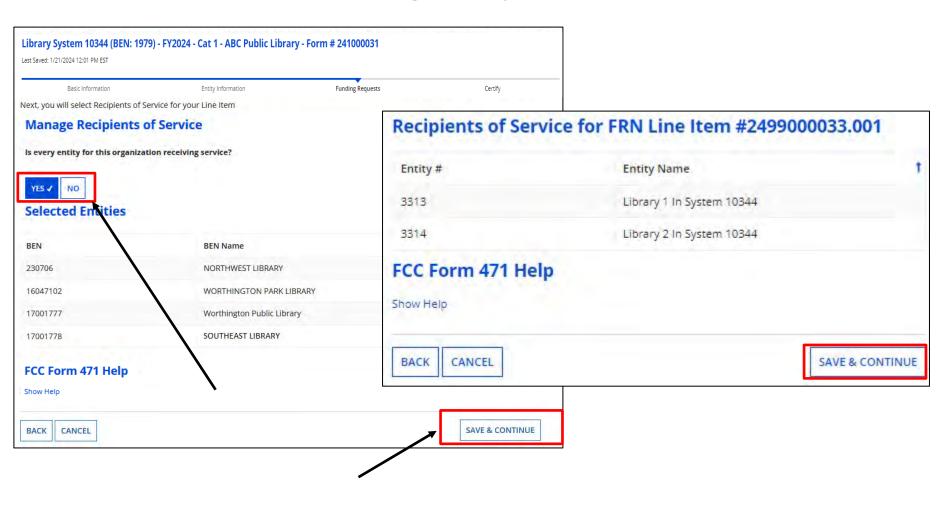
"Cost" is listed per unit. The "Monthly Quantity" indicates the total number of units included in the service, such as the number of circuits. The table calculates the total costs.

"One-Time Cost" would be for installation.



When completed, click on "Save & Continue"

# **Manage Recipients of Service – Shared Service**



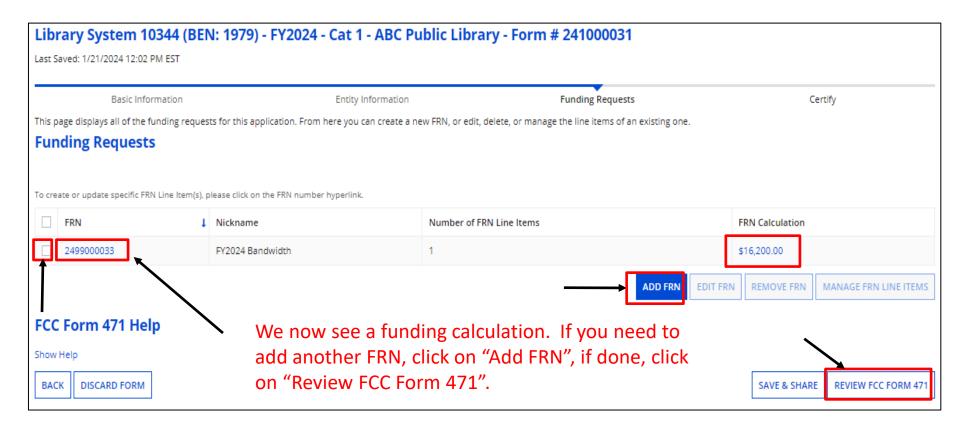
Indicate which entities will receive service for this line item. If all entities will receive service, click on "Yes", then "Save & Continue". You'll then see a confirmation of recipients.

# **Adding FRN Line Items**



The grid shows the completed item. If additional Line Items are needed for this Funding Request, click "Add New FRN Line Item".

If you need to edit information in the line item, click on the FRN Line-Item Number (2499000033.001). If done, click on "Save & Continue".



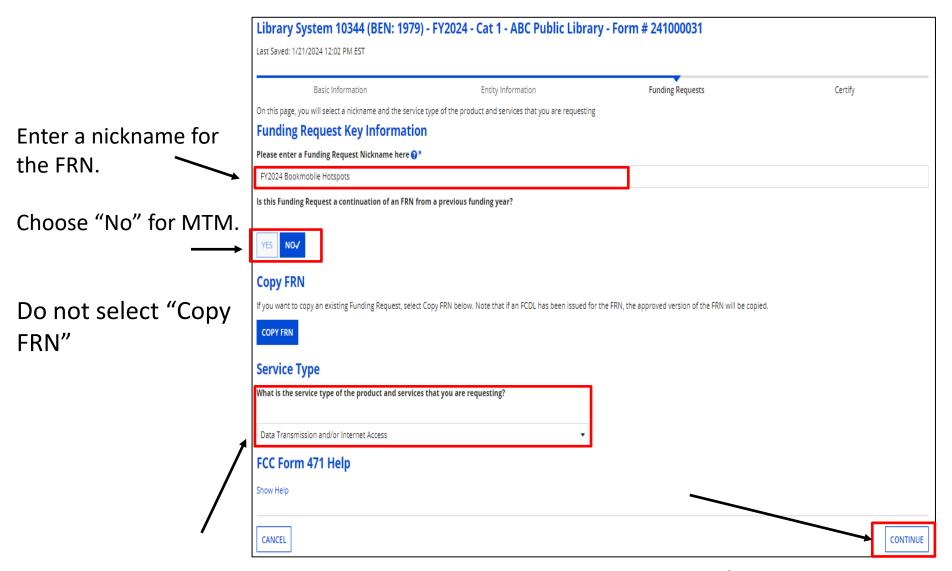
If you need to edit the FRN (Contract information, Service Start Date or Expiration Date, or Narrative) click the box, and then "Edit FRN".

If you need to edit the FRN Line
Items (Costs, bandwidth amounts,
Recipients of Service) click on the
FRN number hyperlink, and then
the Line Item (2499000033) Number.

# Adding Month to Month Funding Request



Click on "Add FRN" to begin.



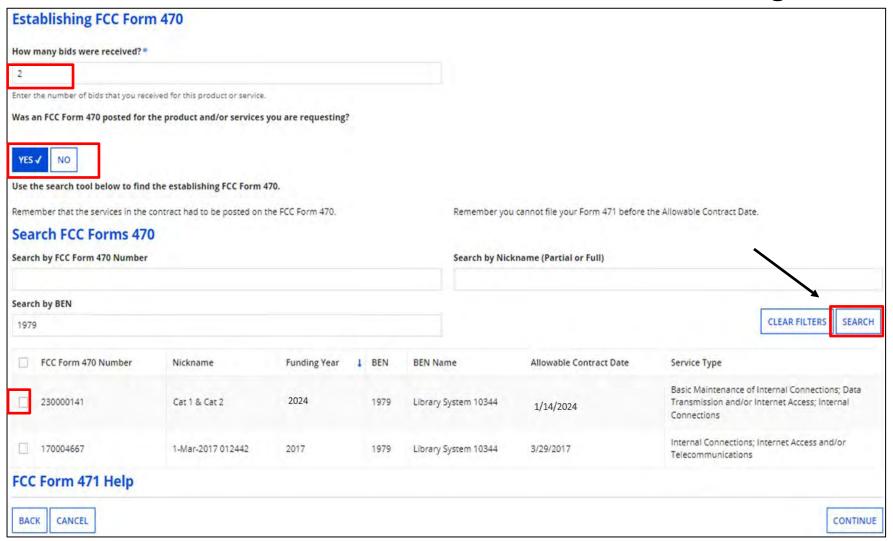
Click on the pull-down to choose "Data Transmission and/or Internet Access" if it doesn't auto-populate, and then click on "Continue"



Choose Month-to-Month. Because there is no contract with MTM, you would not have uploaded a contract, so we still need to provide the Form 470 information. Click on "Continue".

MTM cellular data plans requires you file a Form 470 annually!!

# **Establishing Form 470**



Enter the number of bids received and select "Yes" indicating a Form 470 was filed.

Click on "Search" for your Form 470 and check the box to the left to choose the form that includes the service type requested.

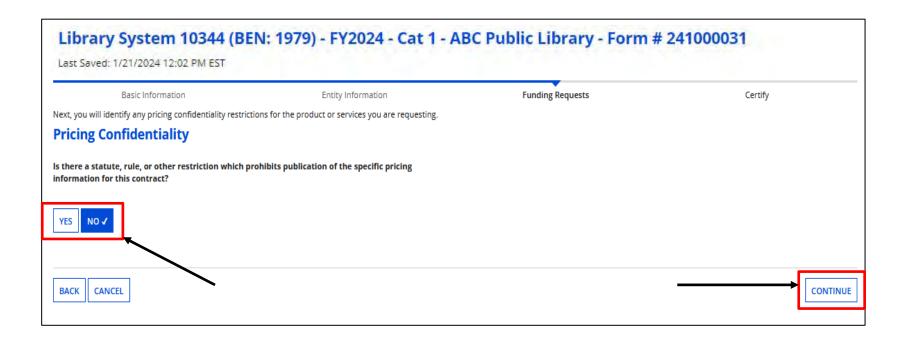
#### **Choose Service Provider**

Service Provider					
Account Number (e.g., billed telephone number)					
If your service provider has give					
Use the search tool below to find the establishing service provider					
Search Service Providers					
Search by SPIN		Search by Name (Full or Parti	al)		
14010001					
			CLEAR FILTERS SEARCH		
SPIN	Name	Doing Business As	State		
14010001	USAC Service Provider Organization 1		VA		
BACK CANCEL CONTINUE					

Enter your account number if known (but it's not required), and then search for your Service Provider. It's easiest to search by their SPIN. Click on "Search". Check the box to the left of the Provider. Once completed, click on "Continue"

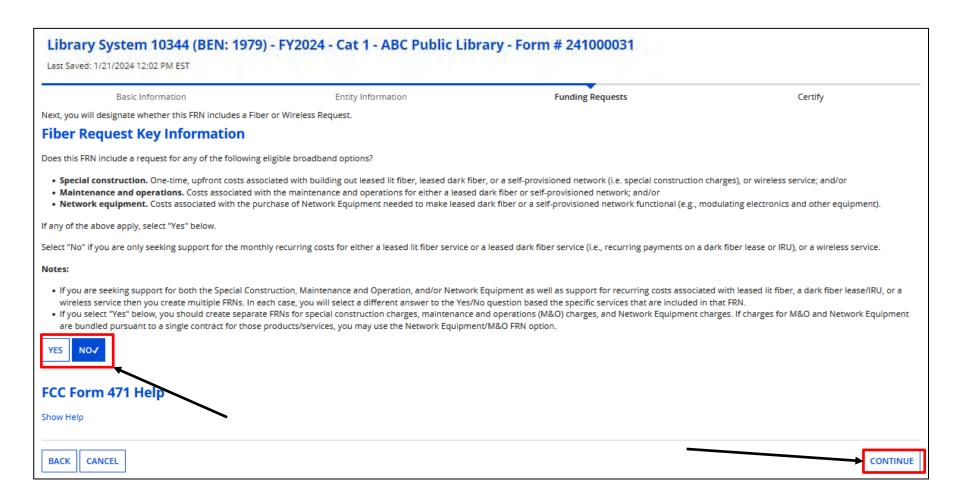
Library System 10344 (BEN: 1979) - FY2024 - Cat 1 - ABC Public Library - Form # 241000031  Last Saved: 1/21/2024 12:02 PM EST						
Basic Information	Entity Information	Funding Requests	Certify			
Next, you will identify the start and end dates for the services you are requesting.  Dates						
What is the service start date? *  07/01/2024		When will the services end? * 06/30/2025				
BACK CANCEL			CONTINUE			

The Service Start Date will auto-populate for the start of FY2024. Enter the Service End Date. The date cannot be after 6/30/2025 for month-to-month service. Click on "Continue"



Indicate if there is a restriction prohibiting publication of the pricing for this contract. If "Yes", you must state the type of restriction (State Law, Local Rule, Court Order, Contract with Restrictive Terms), and upload Restriction Document.

Click on "Continue".



#### Select "No" and click on "Continue"

# **Funding Request Narrative**



Provide a narrative to describe the service.

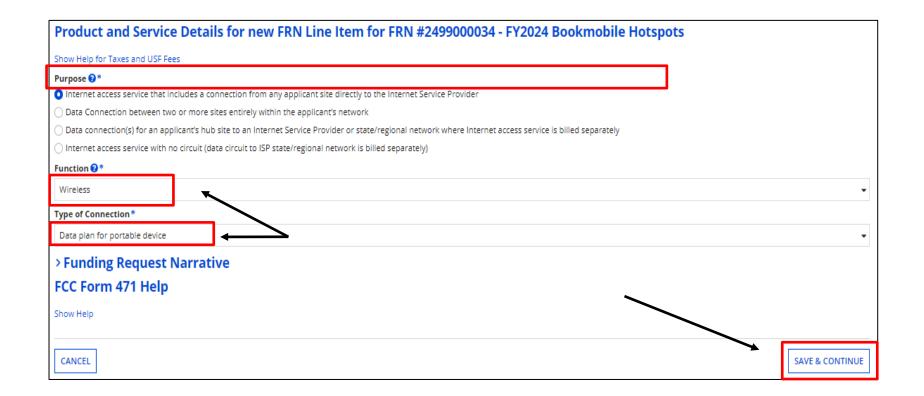
Click on "Save & Add/Manage FRN Line Items".

# **Adding FRN Line Items**



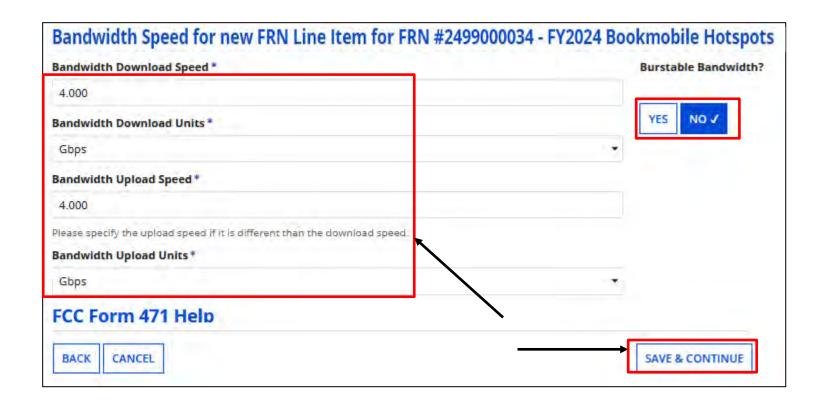
Begin by clicking on "Add New FRN Line Item" to add cost information.

# **Product/Service Details**



Select the "Purpose", "Functions", and "Type of Connection" then click on "Save & Continue".

# **Bandwidth Speeds**



Enter Bandwidth Speed Information, indicating if the bandwidth is burstable, then click on "Continue".

Again, if you are unsure of the information, contact your Service Provider

#### **Connection Information**



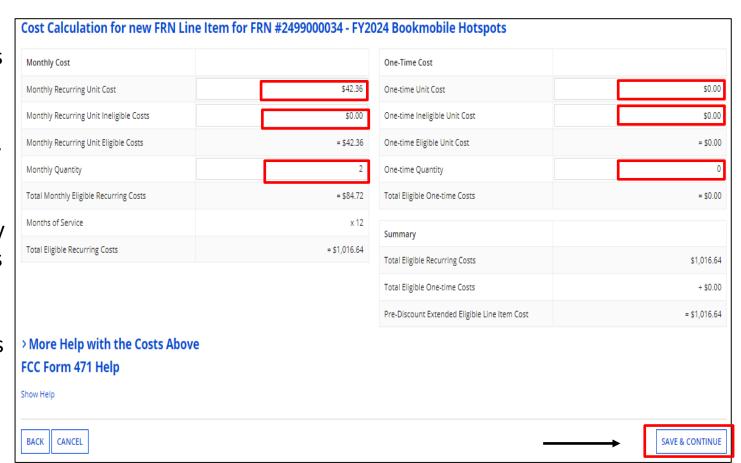
Provide Connection Information, and firewall inclusion. When done, click on "Continue".

**Note:** The system will not allow you to answer "Yes" to both questions displayed in the left-hand column above. If you do, you will receive an error message.

#### **Cost Calculations**

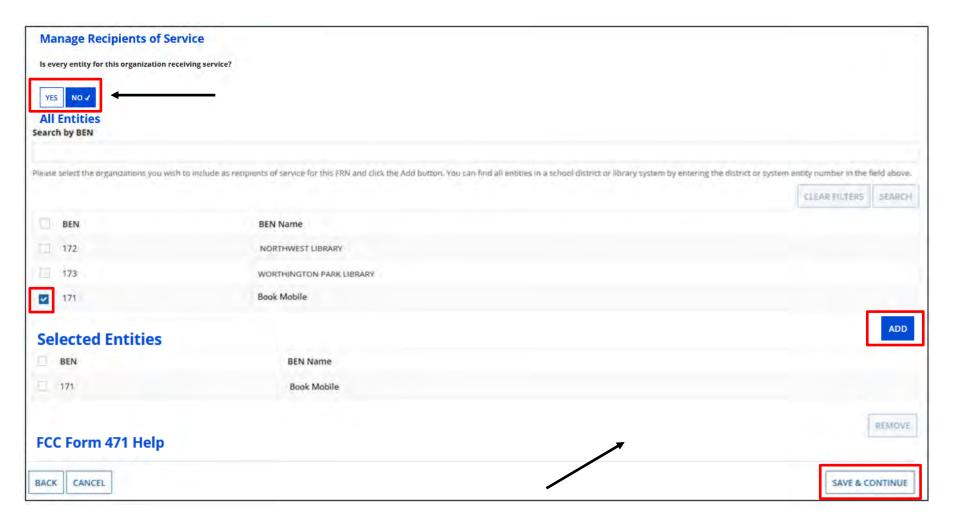
Enter cost information. Fields cannot be left blank. If there is no cost, enter zero.

"Cost" is listed per unit. The "Monthly Quantity" indicates the total number of units included in the service, such as the number of circuits. The table calculates the total costs.



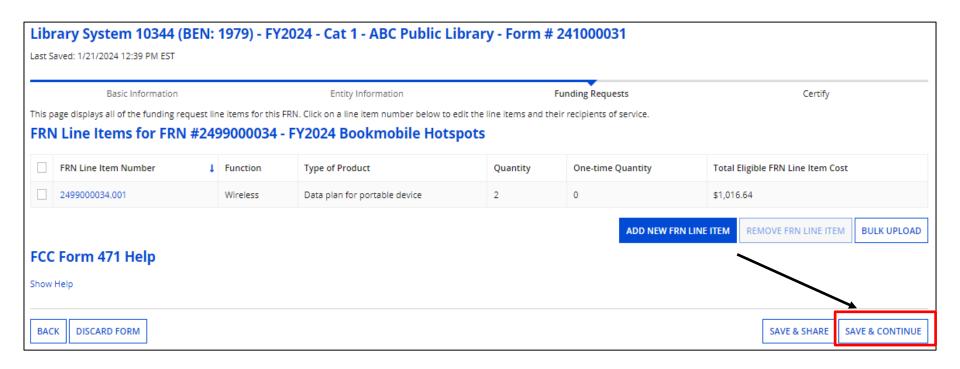
When completed, click on "Save & Continue"

# Manage Recipients of Service – Shared Service



Indicate which entities will receive service for this line item and click on "Add". Click on "Save & Continue". Selected recipients will be listed, click on "Save & Continue" again to see FRN info.

# **Adding FRN Line Items**



When done adding line items, click on "Save & Continue".

# Copying FRN

#### Start by clicking on "Add FRN" as before:

## **Copy FRN**

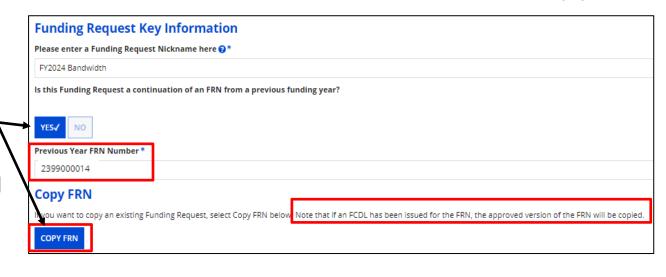
"Copy" option can be used when you're in year 2 or more of a multi-year contract.

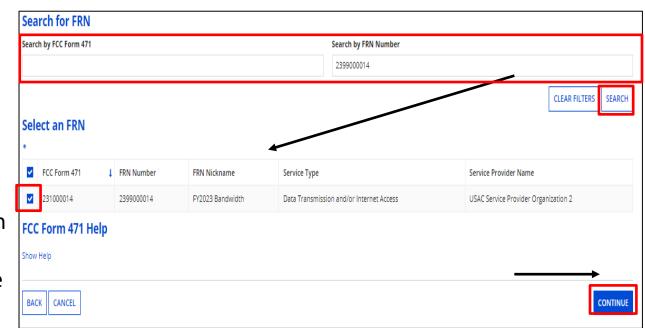
Enter Previous Year FRN and click on "Copy FRN".

Note: if changes were made to the FRN during PIA review, the changes will be copied.

Search by previous Form 471 or FRN number. (We enter the FRN a second time, even though we just provided it)

Check box to select, and then "Continue". You'll receive a pop-up indicating it may take up to one minute to complete, click on "Yes".



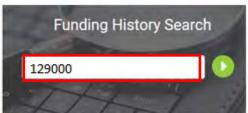


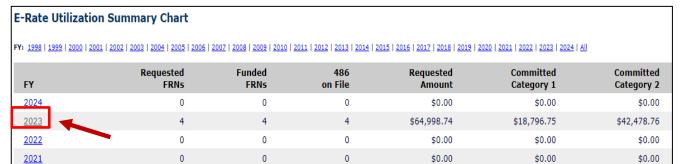
# Quick Way to Get the Information Needed

# Go to: www.E-Ratecentral.com

Try our state funding or BEN Search Tools to find out information about your state or BEN





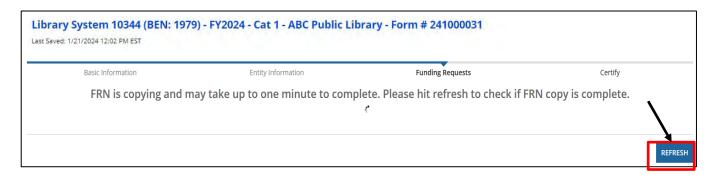




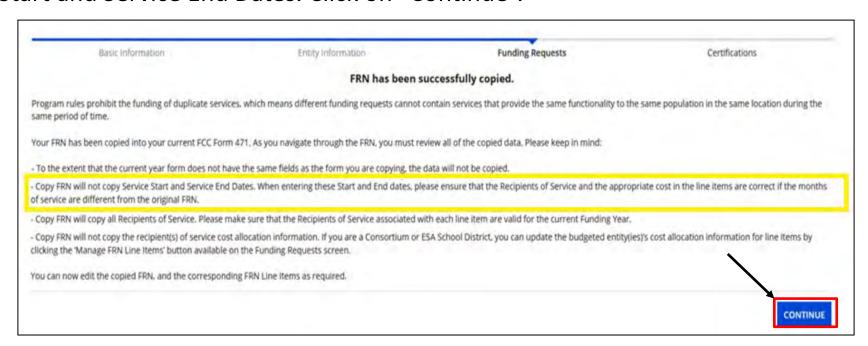
- 1. Enter your Billed Entity Number.
- 2. Click on Funding Year
- 3. See your 471, FRN, and SPIN information.

# **Copy FRN**

# You must click "Refresh" to complete the copy.



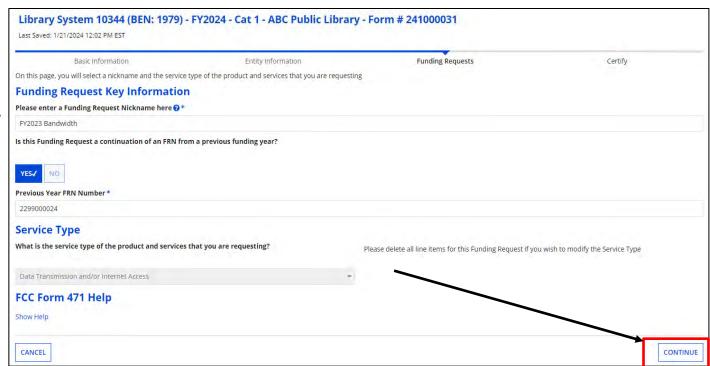
You will receive the following notification indicating you must enter the Service Start and Service End Dates. Click on "Continue".

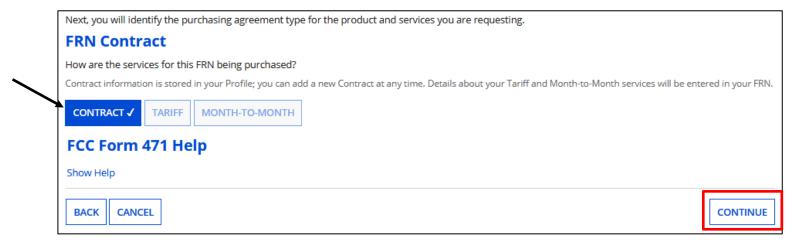


# **Copy FRN**

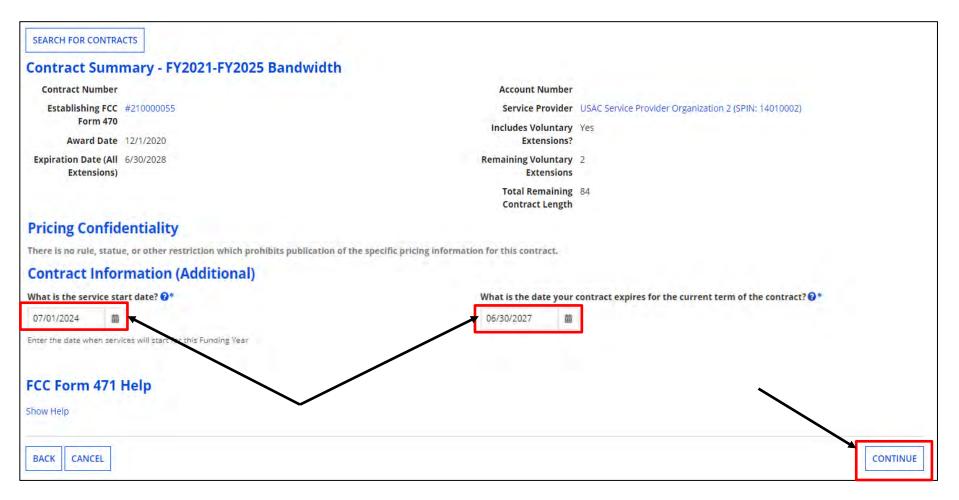
View after copy is completed. "Service Type" will be indicated. Click on "Continue".

Based on previous FRN info, "Contract" is chosen. Click on "Continue





# **Copy FRN**



Verify information that copied from previous FRN. When copying, you must **enter the Service Start Date and Service End Date**. These fields will be blank, and you'll receive an error message if you do not enter the dates. Remember, the Service Start Date is the first day of the upcoming funding year and cannot be prior to **07/01/2024**.

Click on "Continue".

#### Copy FRN

Verify information that copied from previous FRN, Click on "Continue".

Update the narrative if needed. Click "Save & Add/Manage FRN Line Items" to update costs if needed. If there is no change, click on "Save & View FRNs".

Last Saved: 1/21/2024 12:02 PM EST

Narrative

FCC Form 471 Help

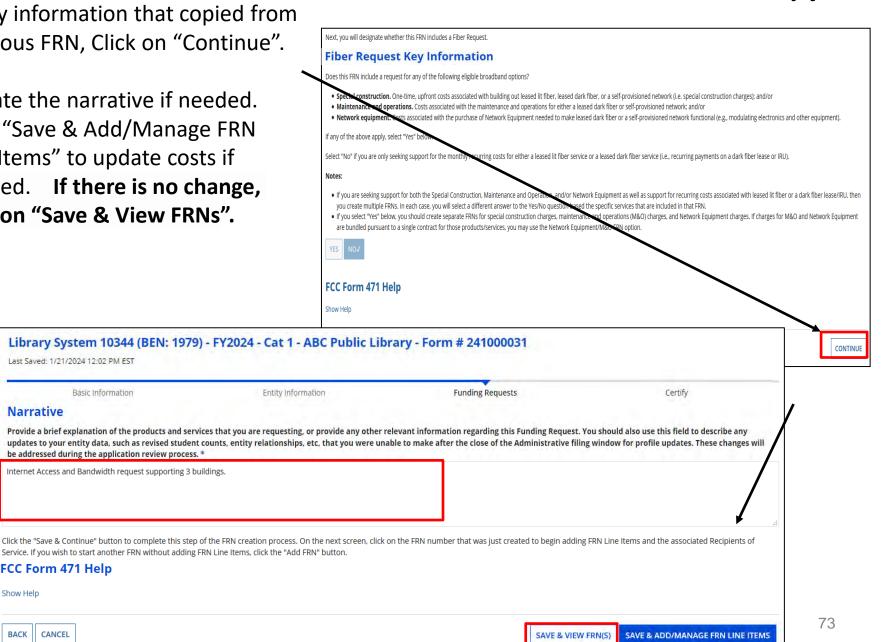
CANCEL

Show Help

BACK

Basic Information

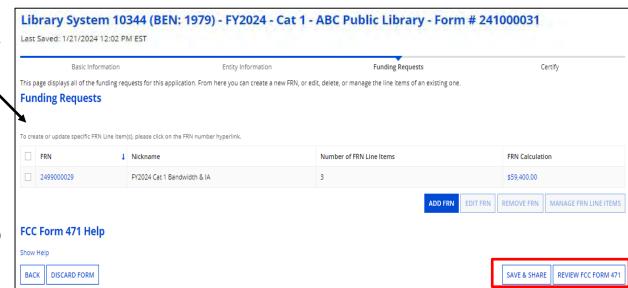
be addressed during the application review process. \* Internet Access and Bandwidth request supporting 3 buildings.

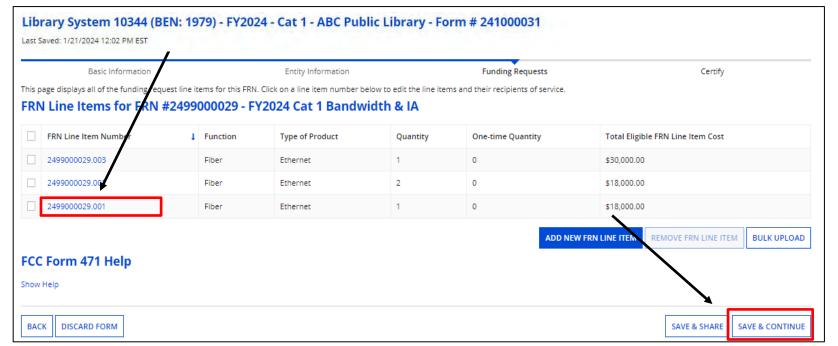


#### **Copy FRN**

"Save & View FRNs" If no changes are needed, click
on "Review FCC Form 471".

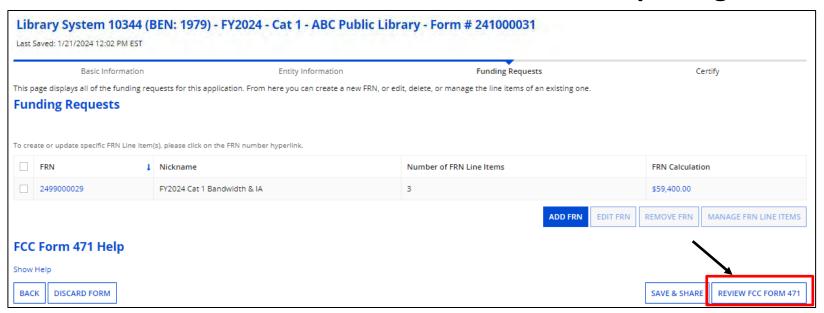
If you clicked on "Manage FRN Line Item", click on the lineitem number to edit, and update information. Click on "Save & Continue" to return to Funding Requests.





# Completing the Form 471

#### **Completing the Form 471**

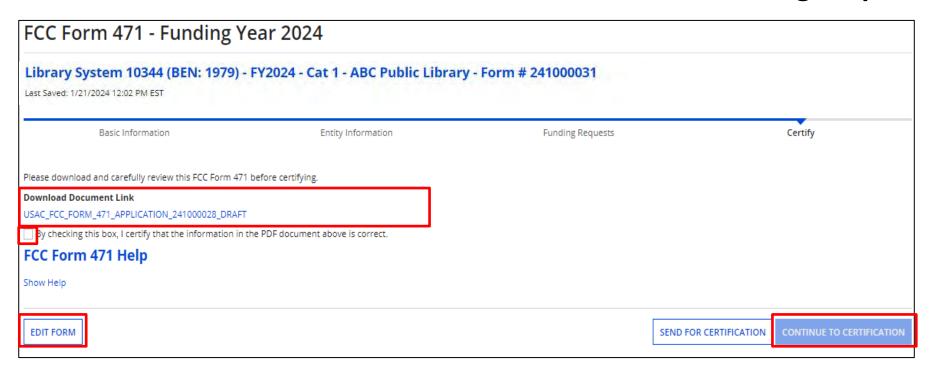




Click on "Review FCC Form 471" and "Yes" to the popup. Instead of being taken out of the Form 471 like we see with the Form 470, you must click on "REFRESH " to receive the draft version of the form and it. Be patient, it may take a little while to display.

You can click on " RESUME TASK LATER " if you prefer to complete at a later time.

#### **Funding Requests**

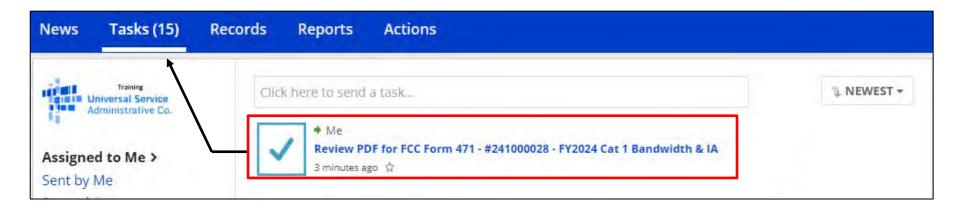


If you chose the "REFRESH" option, click on the draft document to view the PDF. If necessary, click on "Edit Form" to make corrections.

Click the box just below the document to certify if correct. You can then click on "Continue to Certification" or "Send for Certification" to complete the application.

77

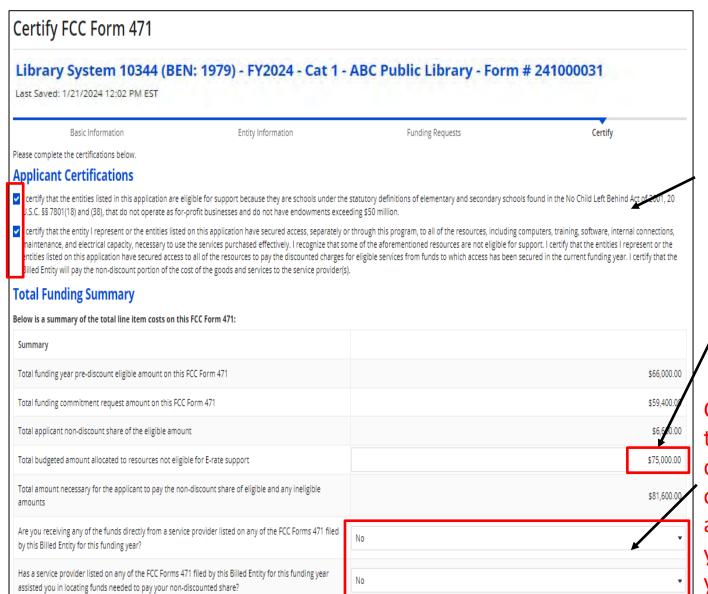
#### **Funding Requests**



If you clicked on " RESUME TASK LATER ", you will need to click on "Tasks" on the blue menu bar to find the newly created task.

Click on the "Review PDF for FCC Form 471" to continue.

#### **Certifying the Form 471**



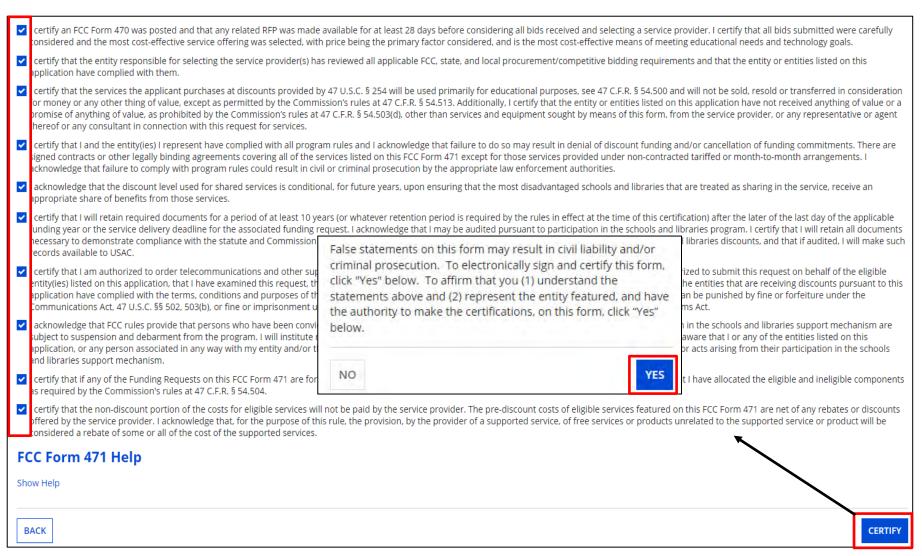
After reading the certifications, check the boxes.

Enter your budget amount.

Click on the pull-downs to answer the "gotcha" questions. Be very careful!! Remember, it's a program violation if you receive funds from your service provider!!

Just say no!!

#### **Certifying the Form 471**



Continue checking all boxes.

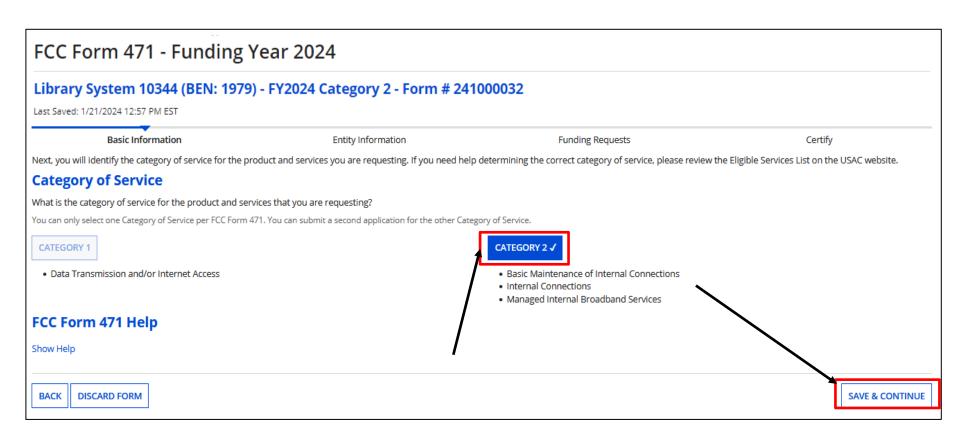
When done, click on "Certify", and then "Yes" in the pop-up.

#### **Certifier Information**

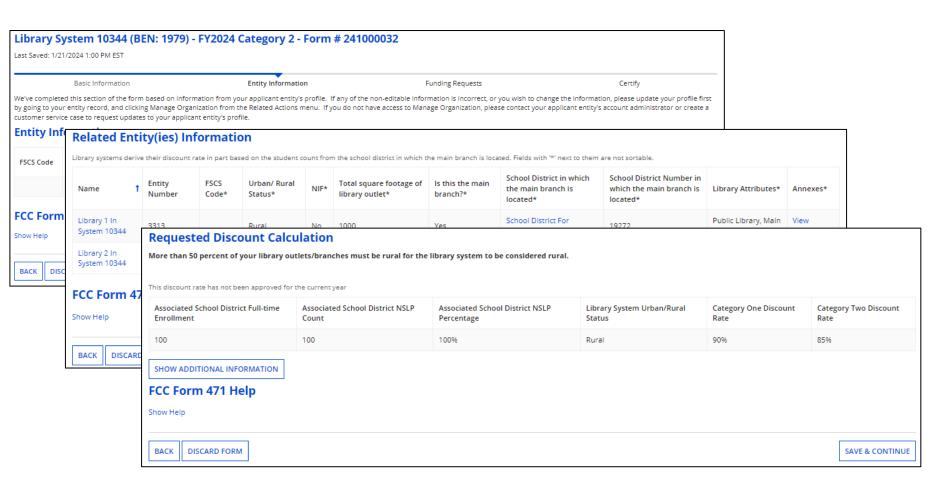
You will receive confirmation that the form was certified.



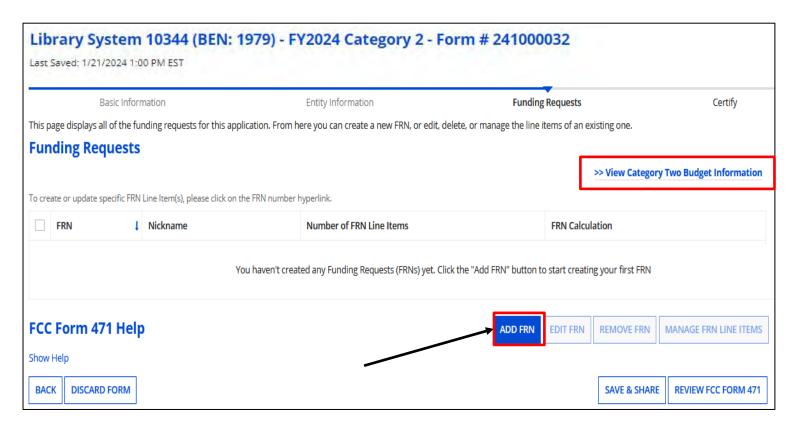
Click the link to access a PDF copy of your certified Form 471. Click on "Close" when done.



Follow previous steps to start a Form 471. At "Category of Service", click on "Category 2", and "Save & Continue".

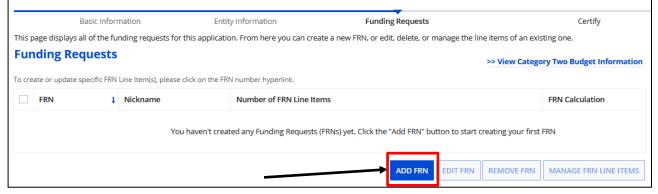


You will see the Related Entities and Requested Discount Calculation



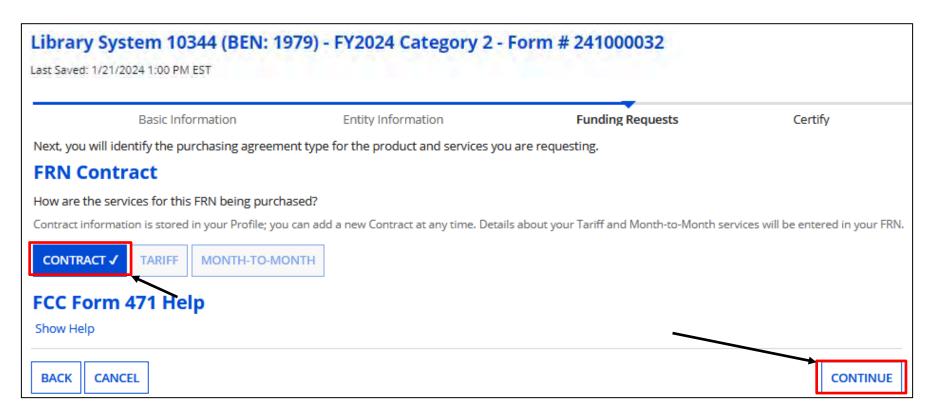
Click on "Add FRN" to begin.

**Note:** You'll also see the Category Two Budget Information option to see your current budget. If you drill down to the information, click on the "Back" button to continue your application.



After clicking on "Add FRN".

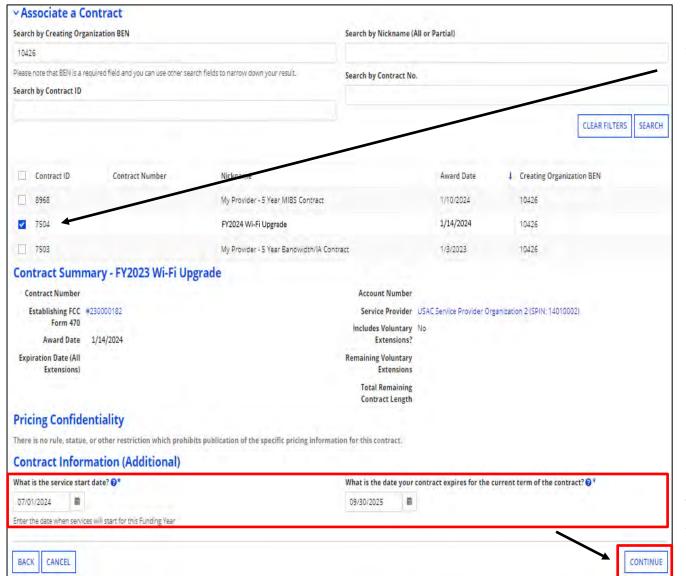
**Funding Request Key Information Enter Funding Request** Please enter a Funding Request Nickname here 2\* FY2024 Wi-Fi Upgrade Nickname, and answer Is this Funding Request a continuation of an FRN from a previous funding year? continuation question. NO. For Internal Connections. Copy FRN this will be "No". If you want to copy an existing Funding Request, select Copy FRN below. Note that if an FCDL has been issued for the FRN, the approved version of the FRN will be copied. **COPY FRN** Click on the pull-down to Service Type select "Service Type". What is the service type of the product and services that you are requesting? Please select à Value Click on "Continue" Basic Maintenance of Internal Connections Internal Connections Managed Internal Broadband Services



Indicate how the service will be purchased. Click on "Continue"

For Internal Connection hardware, a copy of a quote and evidence of an acceptance (e.g., Signed bid matrix, or signing off on quote) may be uploaded.

If choosing "Contract", complete the steps under "Manage Contract" previously discussed prior to starting the Form 471.

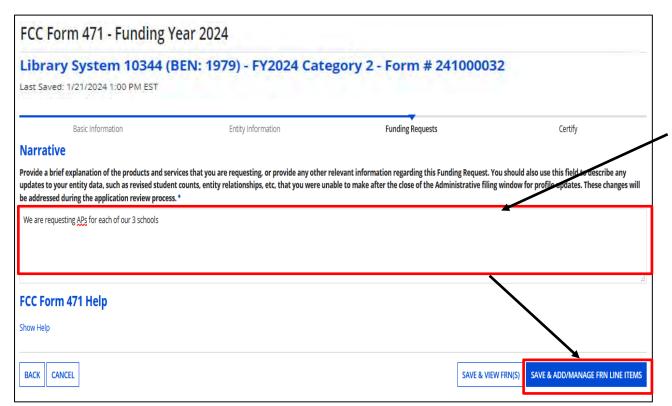


Associate a Contract, and enter the Service Start and End dates.

Click on "Continue"

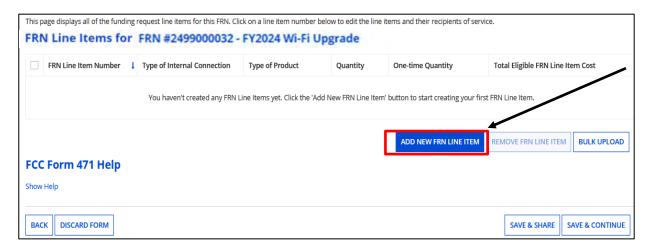
Remember, you can purchase Internal Connection hardware as early as **April 1**<sup>st</sup>, once choosing a vendor. However, the **Service Start Date will be July 1**<sup>st</sup>.

In addition, we're given an additional 90 days after the close of the funding year to complete the project, which for FY2024 is **9/30/2025**.



Provide a narrative of the products or services.
Include updated enrollment and NLSP is necessary

Click on "Save & Add/ Manage FRN Line Items".



Click on "Add New FRN Line Item".

**Note:** If you have a quote with multiple types of IC products, you will need to add each as line items to the funding request.

## **Adding Line Items**

	ITEM	QTY	UNIT PRICE	EXT. PRICE
1.	Cisco Catalyst 9120AXE - wireless access point - 802.15.4, Bluetooth, Wi-Fi Mfg. Part#: C9120AXE-B	60	\$1,141.49	\$68,489.40
2.	Cisco antenna Mfg. Part#: AIR-ANT2535SDW-RS=	240	\$47.32	\$11,356.80
3.	Cisco Digital Network Architecture Essentials - Term License (3 Years) Mfg. Part#: AIR-DNA-E-3Y	60	\$133.08	\$7,984.80
4.	Cisco Catalyst 9200 - switch - 24 ports - smart - rack-mountable  Mfg. Part#: C9200-24P-EDU	4	\$2,069.80	\$8,279.20
5.	Cisco - network stacking module Mfg. Part#: C9200-STACK-KIT	4	\$881.92	\$3,527.68
6.	Cisco Catalyst 9200 - switch - 48 ports - managed - rack-mountable  Mfg. Part#: C9200-48P-EDU	2	\$4,348.14	\$8,696.28
7.	APC Smart-UPS X 3000V A Sinewave 4U Rackmount Extended Run, LCD, 120V Mfg. Part#: SMX3000LVNC	8	\$2,408.24	\$19,265.92
8.	APC Smart-UPS X 750VA SmartConnect Port Tower Network Card, LCD, 120V Mfg. Part#: SMX750CNC	4	\$1,198.41	\$4,793.64
9.	Proline 3ft RJ-45 (M) RJ-45 (M) Straight Blue Cat6 UTP PVC Patch Cable  Mfg. Part#: PRO-3FCAT6-BE	500	\$1.84	\$920.00
10.	Proline Sft RJ-45 (M) RJ-45 (M) Straight Blue Cat6 UTP PVC Patch Cable Mfg. Part#: PRO-5FCAT6-BE	500	\$3.67	\$1,835.00
11.	Leviton 24-Port QuickPort Patch Panel with Cable Management Bar - Black Mfg. Part#: 49255-H24	10	\$43.61	\$436.10
12.	Leviton QuickPort patch panel - 1U Mfg. Part#: 49255-Q48	10	\$94.63	\$946.30

Any item listed on the proposal you want to be funded must also be listed as a line item in the funding request.

Looking at a sample quote, this funding request will need twelve line items.

### **Adding Line Items**

	ITEM	QTY	UNIT PRICE	EXT. PRICE
1.	Cisco Catalyst 9120AXE - wireless access point - 802.15.4. Bluetooth, Wi-Fi Mfg. Part#: C9120AXE-B	60	\$1,141.49	\$68,489.40
2.	Cisco antenna Mfg. Part#: AIR-ANT2535SDW-RS=	240	\$47.32	\$11,356.80
3.	Cisco Digital Network Architecture Essentials - Term License (3 Years).  Mfg. Part#: AIR-DNA-E-3Y	60	\$133.08	\$7,984.80
4.	Cisco Catalyst 9200 - switch - 24 ports - smart - rack-mountable	4	\$2,069.80	\$8,279.20
	Mfg. Part#: C9200-24P-EDU  ABC VENDOR QUOTE - West School/Library			
		QTY	UNIT PRICE	EXT. PRICE
1,	ABC VENDOR QUOTE - West School/Library	<b>QTY</b> 40	UNIT PRICE \$1,141.49	<b>EXT. PRICE</b> \$45,659.60
1	ABC VENDOR QUOTE - West School/Library  ITEM  Cisco Catalyst 9120AXE - wireless access point - 802,15.4, Bluetooth, Wi-Fi	-		CHAIR MAN
-	ABC VENDOR QUOTE - West School/Library  ITEM  Cisco Catalyst 9120AXE - wireless access point - 802,15.4, Bluebooth, Wi-Fi  Mfg. Part#: C9120AXE-B  Cisco antenna	40	\$1,141.49	\$45,659.60

If there are identical items, such as a quote broken out by school or library site, you can add the quantities together.

In this example, you would have four line items.

- 1. 100 Access Points
- 2. 380 Antennas
- 3. 100 Licenses
- 4. 8 -Switches

First choose "Type of Internal Connection"

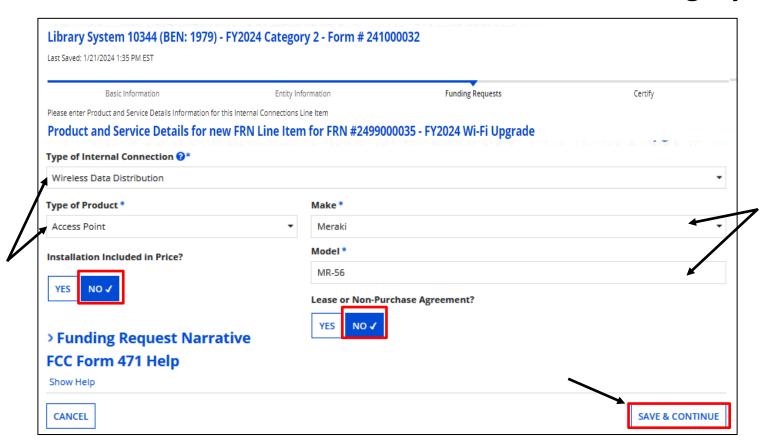
Then choose "Type of Product"

Type of Internal Connection - Pull Down Options

 Cabling Cabling / Connectors Connectors Caching Equipment Caching Caching Service Router Data Distribution Switch • Firewall Services & Components **Data Protection**  UPS/Battery Backup Racks Racks & Cabinets · Operating System Software of Eligible Software Equipment Access Points Wireless Data Antenna Distribution LAN Controller Wireless Controller · Installantion, Activation, & Initial Configuration Miscellaneous Training · Fees, Taxes, etc. License License Transceiver Transceiver Module Module

Any item listed on the proposal must also be listed as a line item in the funding request.

Note: These options are included in the pull-down as choices even though not on the Form 470, or lumped together with equipment such as software and licenses

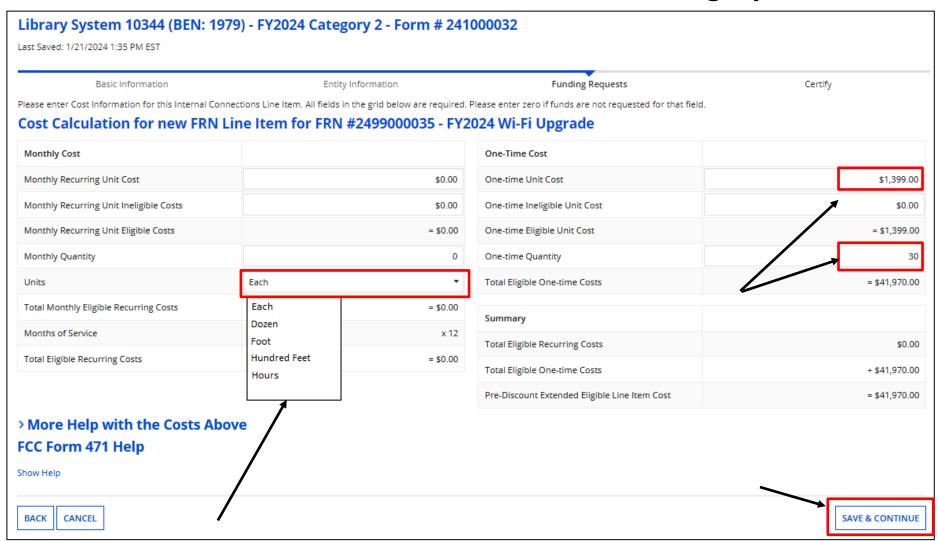


Click on pull-downs to indicate <u>Type</u> of Internal Connection, and then Type of Product, Make, and then manually enter the Model.

Is Installation included? Select "Yes" or "No"

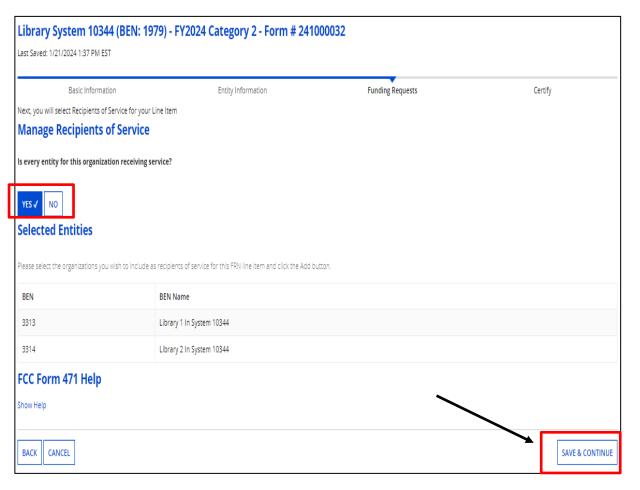
Will the hardware be leased? Select "Yes" or "No"

When completed, click on "Save & Continue"



Indicate "Units"

Enter the per unit cost and quantity.
When done, click on "Save & Continue"

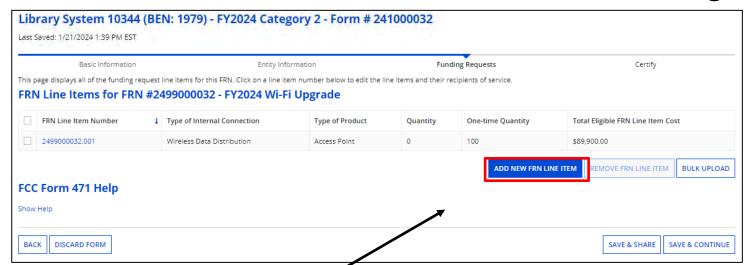


At "Manage Recipients of Service", indicate if all entities will receive service. If not, select "No" and check which ones will, and click on "Add".

Indicate which buildings you intend to purchase C2 equipment for, but if that changes, you do not have to inform USAC.

Just keep track in your inventory system.

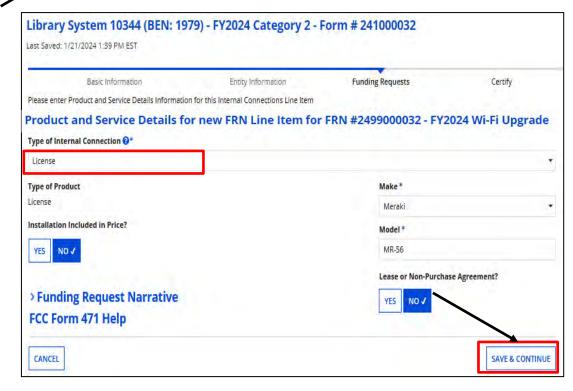
Click on "Save & Continue" to select the entities and then again to confirm.



To add additional line items, click "Add New FRN Line Item".

In this case we are adding the license portion of the cost. \*If you listed the license on the Form 470 under both IC & BMIC, list them under IC on the 471. Let the reviewer tell you if that needs to change.

Provide information, and click on "Save & Continue"

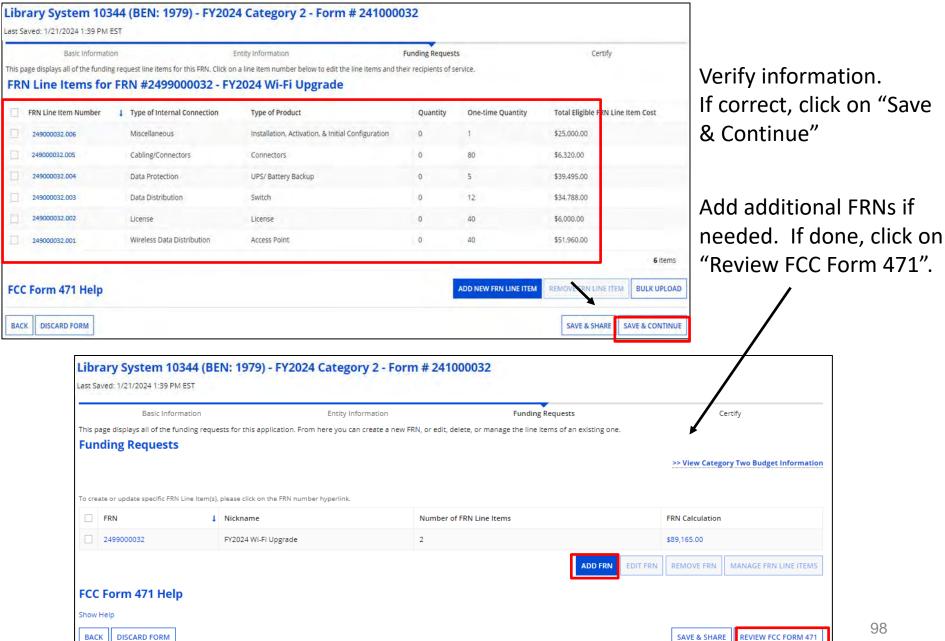


#### Library System 10344 (BEN: 1979) - FY2024 Category 2 - Form # 241000032 Last Saved: 1/21/2024 1:39 PM EST Basic Information Entity Information **Funding Requests** Please enter Cost Information for this Internal Connections Line Item. All fields in the grid below are required. Please enter zero if funds are not requested for that field. Cost Calculation for new FRN Line Item for FRN #2499000032 - FY2024 Wi-Fi Upgrade Monthly Cost One-Time Cost Monthly Recurring Unit Cost \$0.00 One-time Unit Cost \$150.00 Monthly Recurring Unit Ineligible Costs \$0.00 One-time Ineligible Unit Cost \$0.00 Monthly Recurring Unit Eligible Costs = \$0.00One-time Eligible Unit Cost = \$150.00 Monthly Quantity 0 One-time Quantity Each Total Eligible One-time Costs Units = \$4,500.00 Total Monthly Eligible Recurring Costs = \$0.00 Summary Months of Service x 12 Total Eligible Recurring Costs \$0.00 Total Eligible Recurring Costs = \$0.00 Total Eligible One-time Costs + \$4,500.00 Pre-Discount Extended Eligible Line Item Cost = \$4.500.00 > More Help with the Costs Above FCC Form 471 Help SAVE & CONTINUE **BACK** CANCEL

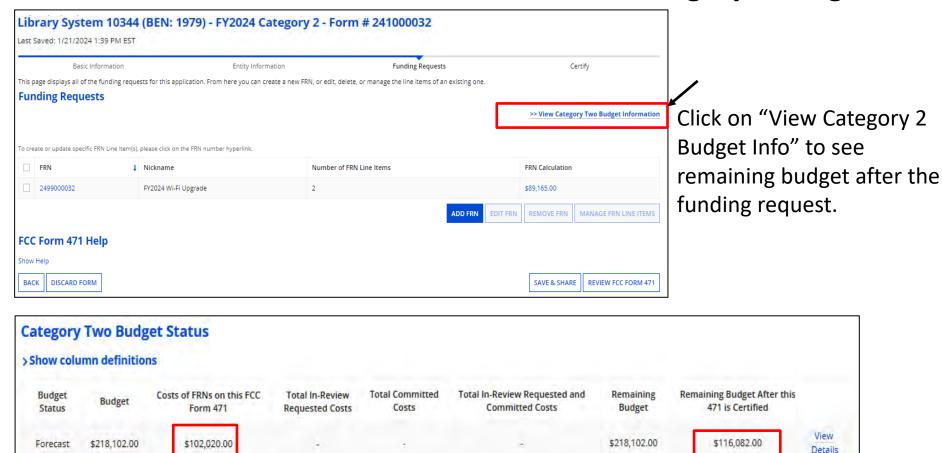
#### Category 2 Form 471

Provide cost and quantity.

After clicking on "Save & Continue", you will indicate the Recipients of Service.



#### **Category 2 Budget Info**

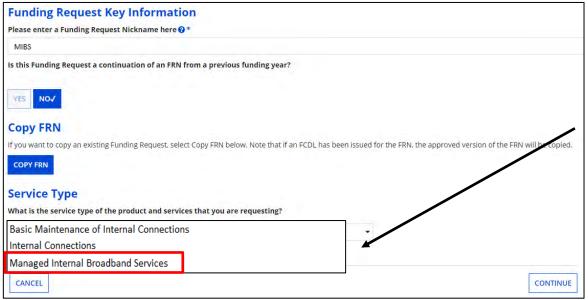


FCC Form 471 Help

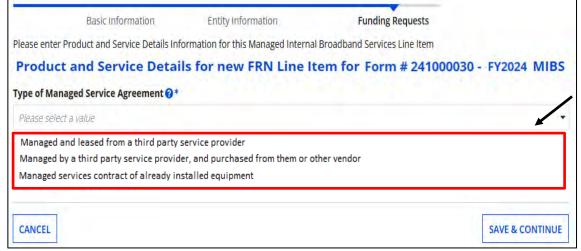
BACK

The total pre-discount cost is shown and remaining budget. Click on "Back" to continue your application.

#### **Category 2 MIBS**

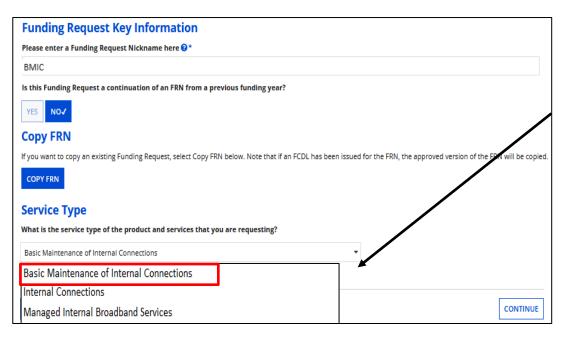


If requesting MIBS, create the FRN like before, associating a contract, and click on "Save & Add/Manage FRN Line Items" choosing "Managed Internal Broadband Service" as the Service Type, and complete the Contract, service dates, and narrative sections.



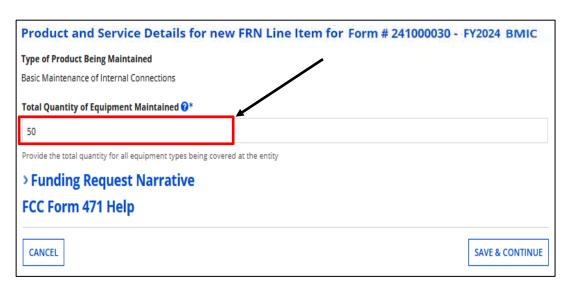
Choose the type of "Managed Service Agreement" in the FRN Line Item detail. Click on "Save & Continue" and provide cost per your contract and show cost.

#### **Category 2 BMIC**



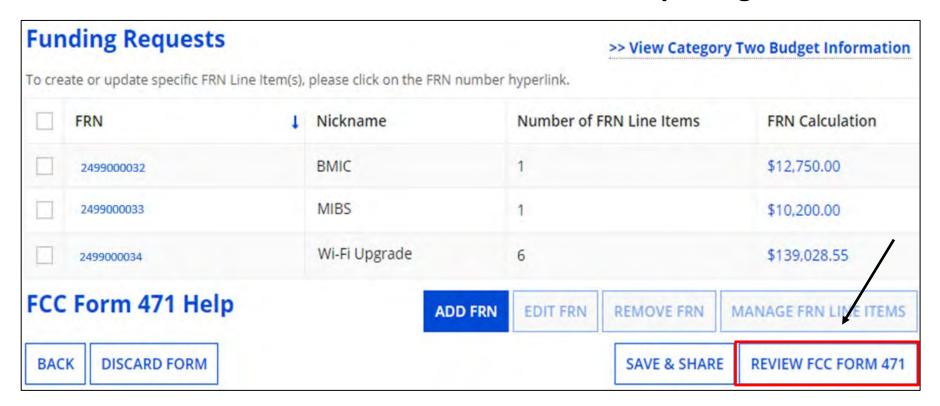
If requesting Basic Maintenance, create the FRN like before, choosing "Basic Maintenance of Internal Connections" as the Service Type.

Click on the FRN and "Add New FRN Line Item".



Simply enter the total quantity of all equipment types being covered. You do not indicate the "Type" of equipment on the form. Click on "Save & Continue" and provide the total one-time or monthly cost, and then Recipients of Service.

#### **Completing the Form 471**

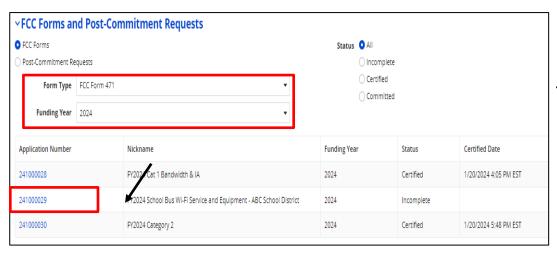


#### Completing the Category 2 application is the same as the Category 1 version.

Click on "Review FCC Form 471". Click on "REFRESH" to receive the draft version and complete the form. Be patient, it may take a little while to display. Or,

You can click on " RESUME TASKLATER " if you prefer to complete the form at a later time.

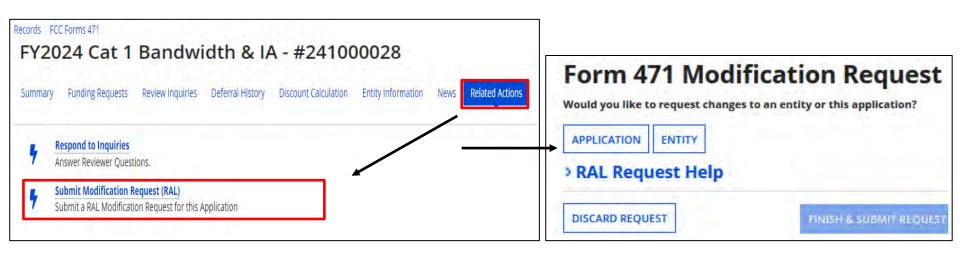
# After the Form 471 - Next Steps



# Finding Your 471 & Making Corrections

To find a submitted Form 471, scroll down to the bottom of the Landing Page, select 471 as "Type" and 2024 for "Funding Year".

Click on the Application Number.

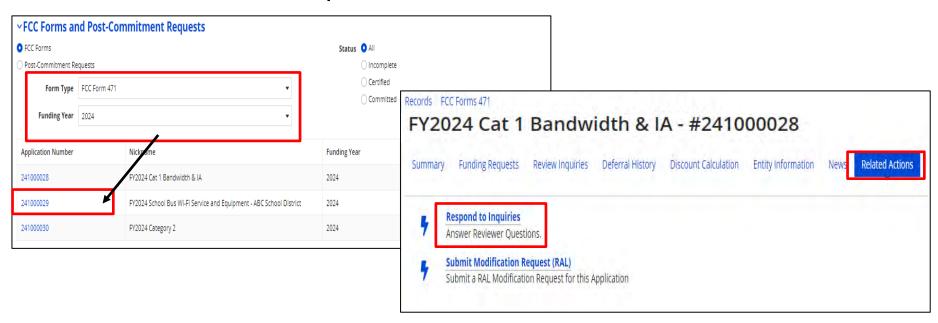


To make corrections after your Form 471 has been certified, submit a RAL Modification Request. For details on how to submit, see "Submitting Form 471 RAL Corrections" on my website for a step-by-step guide covering various scenarios at <a href="https://www.ohio-k12.help/erate/e-rate-resources/">https://www.ohio-k12.help/erate/e-rate-resources/</a>.

# **Application Review - PIA**

Program Integrity Assurance (PIA) will review your application after it is submitted and communicate with you through EPC.

To look for Review Inquires, search for 471 as before:



Click on "Review Inquires" or "Respond to Inquires".

# **Application Review - PIA**

#### Reviewers

- verify the eligibility of the schools and libraries and their discount levels.
- verify that the services requested are eligible for E-Rate discounts.
- communicate with you with requests for additional documentation.
- may ask for additional verification of your compliance with program rules.
- You are given an opportunity to make allowable corrections to your form.

# **Application Review - PIA**

- Have documentation ready
- Respond to inquiries and provide information promptly, by the deadline (usually 15 days)
- Ask for clarification if you are unsure what is needed
- Ask early for an extension if you need it
- Put responses in writing
- Document all responses

# **Funding Decision**

The Funding Commitment Decision Letter (FCDL) is a letter issued by USAC to both the applicant and the service provider that contains decisions on their funding requests. You'll receive an email when it is issued. The letter states which funding requests of the Form 471 are approved or denied.

Applicants and service providers should carefully review their FCDL for details on approved or denied requests and any adjustments made to the original requests, as well as next steps (such as the deadline for filing an appeal which is 60 days for the date of the FCDL).

# **Change Options To Be Aware Of**

#### **SPIN Changes**

 If you enter the wrong SPIN, the company merges with another, or your chosen vendor can't provide the service.

#### **Service Substitutions**

 If you entered incorrect service information, or you are making an allowed change to the service, use this to notify USAC of the change.

### FCC Form 500 - Use this form is you need to do the following:

- Change service start date
- Change contract expiration date
- Cancel funding request
- Reduce funding request
- Submit service delivery extension request (non-recurring)



Questions?!!

# **Contact Information**

# **E-Rate Support and Information**

#### **Lorrie Germann:**

lgermann@ohiocsc.org or lorrie.germann@education.ohio.gov

www.ohio-k12.help/erate

Office: 740-223-2420

Cell: 740-253-1153

