

FY2026 Form 470 Cat 1 Workshop - Libraries

Presented by:

Lorrie Germann, State E-Rate Coordinator

The Purpose of the Form 470

The Form 470:

- Announces a school's intent to participate in the E-Rate program and lists the services desired:
 - Category 1
 - Internet Access/Transport (Bandwidth)
 - Hotspots for Bookmobile
- Acts as an RFP
- Begins the mandatory 28-day competitive bidding process
- If a service is not listed on a Form 470, you cannot request it on a Form 471 (or it won't be funded)

Form 470

- You must apply for E-Rate funding each year
- The only time you don't need to file a Form 470 is in the second (or later) year of a multi-year contract that was established on a previous year's Form 470, or
- Using a CABIO service.

You must still file a 470 for everything else!

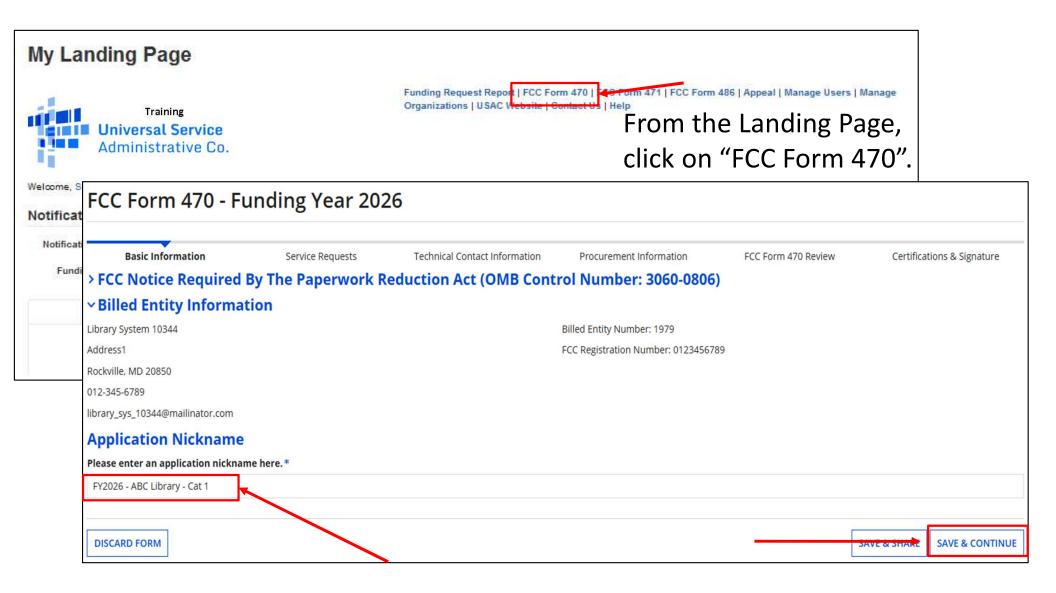
Off-Premises Wi-Fi Hotspots Are No Longer E-Rate Eligible

- On Sept. 30, 2025, the FCC overturned the previously adopted Report and Order (FCC 24-76), which made **Wi-Fi hotspots** and mobile wireless Internet services for off-premises use eligible for E-Rate program support.
- The Commission clarified that providing Wi-Fi or similar technologies outside of traditional school and library premises does not fall within the scope of the E-Rate program.
- Based on this decision, the FCC has released an amended FY2025 Eligible Services List, removing Wi-Fi services for school buses and hotspots as eligible services. This also applies to FY2026 forward. However, the current version of the Form 470 has not been updated to reflect the change.
- This does not apply to hotspots used for bookmobiles or kiosks!

Form 470 - After Submission Changes

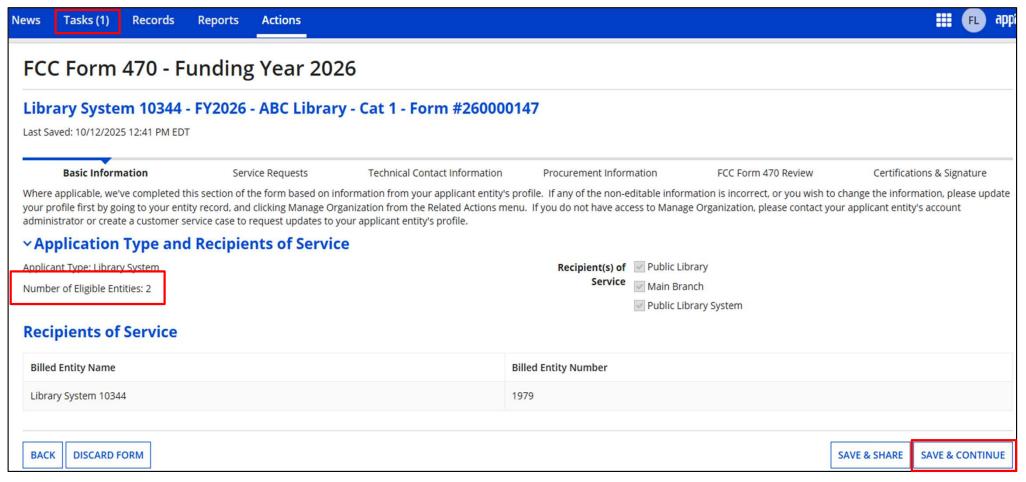
- Ability To Upload RFP Documents After Certification.
 - Applicants can upload an RFP (request for proposals) after the FCC Form 470 is submitted and certified in EPC, but cannot remove RFP documents attached to your FCC Form 470.
 - If the new RFP changes the service originally requested (increasing bandwidth or quantities), you can restart the 28day waiting period; there is no need to refile!
- Ability To Cancel FCC Forms 470 and View Canceled Forms.
 - Applicants can view canceled FCC Forms 470 in EPC under Records -> FCC Forms 470 by selecting "Canceled" under the Status filter.

Starting the Form 470



Enter Nickname (user defined) and click on "Save and Continue"

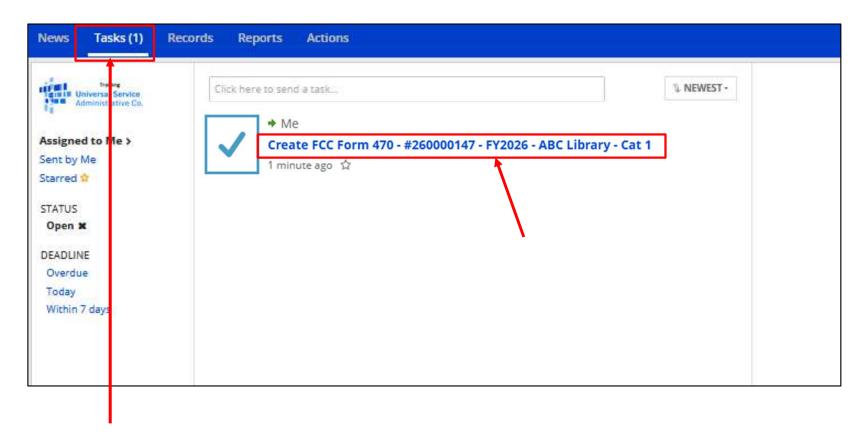
Completing the Form 470



Once you save the application, the "Task" is indicated on the main menu bar.

Verify the information listed about your entity. If necessary, update your profile.

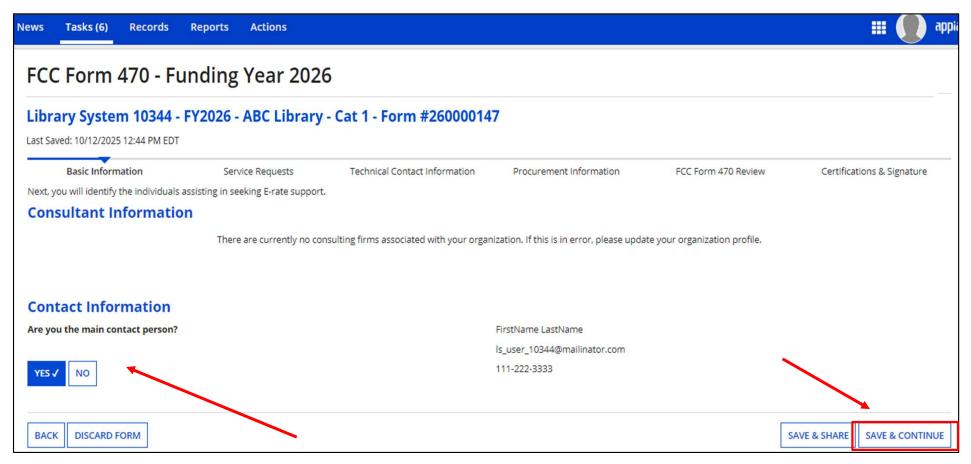
Tasks



If you start an application, and cannot complete it, go to "Tasks" located on the main menu bar, and click on form to complete.

Note: It will say "Create" instead of "Continue".

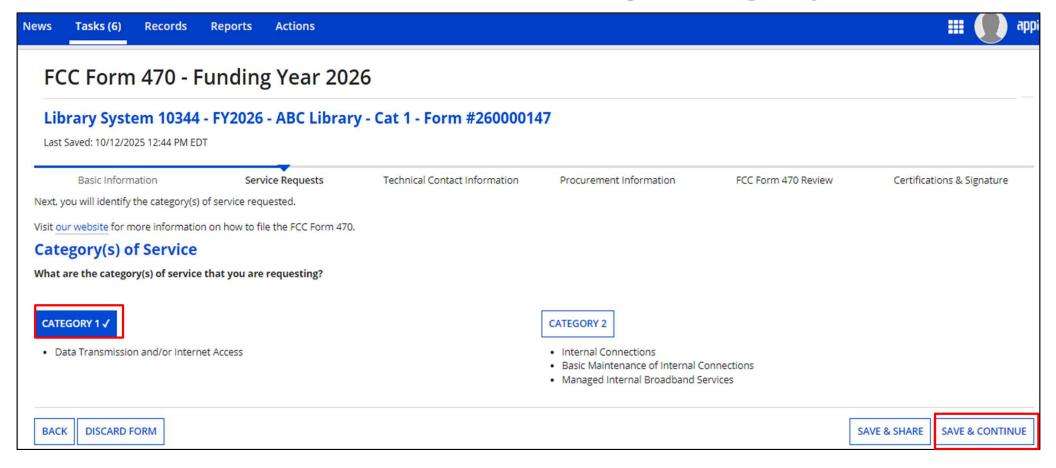
Contact Information



Choose option for contact information. If "Yes", your info will display.

If someone else will be the main contact, choose "No" and provide their information. Keep in mind they must have a portal account.

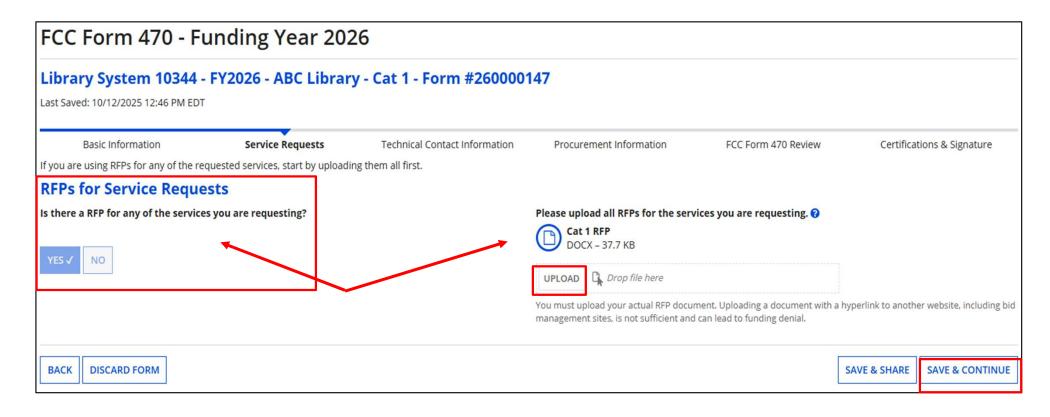
Choosing Category of Service



Choose the "Category of Service" you are seeking.

On the Form 470, you can list services from both Category One and Category Two on the same application.

Adding An RFP



If you have an RFP for any of the services that will be included on the Form 470, click on "Yes". This could be as simple as a spreadsheet with a list of sites and addresses, or a list of hardware and quantities.

You will then see the "Upload" option to attach the RFP file.

You can add multiple documents, if necessary, for both Category 1 & 2.

Simple RFP Examples

Cat 1:

| Name | Address | Notes | |
|--------------------------------|---|---|--|
| CAMDEN BRANCH LIBRARY | 104 S. Main Street, Camden, Ohio 45311 | Point-to-Point connection to 450 S Barron St, Eaton, OH 45320 | |
| ELDORADO BRANCH LIBRARY | 150 N. Main Street, Eldorado, Ohio 45321 | Point-to-Point connection to 450 S Barron St, Eaton, OH 45320 | |
| NEW PARIS BRANCH LIBRARY | 115 N. Washington Street, New Paris, Ohio 45347 | Point-to-Point connection to 450 S Barron St, Eaton, OH 45320 | |
| WEST ALEXANDRIA BRANCH LIBRARY | 16 N. Main Street, Town Hall, West Alexandria, Ohio 45381 | Point-to-Point connection to 450 S Barron St, Eaton, OH 45320 | |
| WEST ELKTON BRANCH LIBRARY | 135 N. Main Street, Town Hall, West Elkton, Ohio, 45070 | Point-to-Point connection to 450 S Barron St, Eaton, OH 45320 | |
| WEST MANCHESTER BRANCH LIBRARY | 212 S. High Street, West Manchester, Ohio 45382 | Point-to-Point connection to 450 S Barron St, Eaton, OH 45320 | |

or

RFP for Wireless Service

BEN: 129000 - Ohio County Library

210 S Broadway St. Anytown, OH 44256

CONTACT: Jane Doe

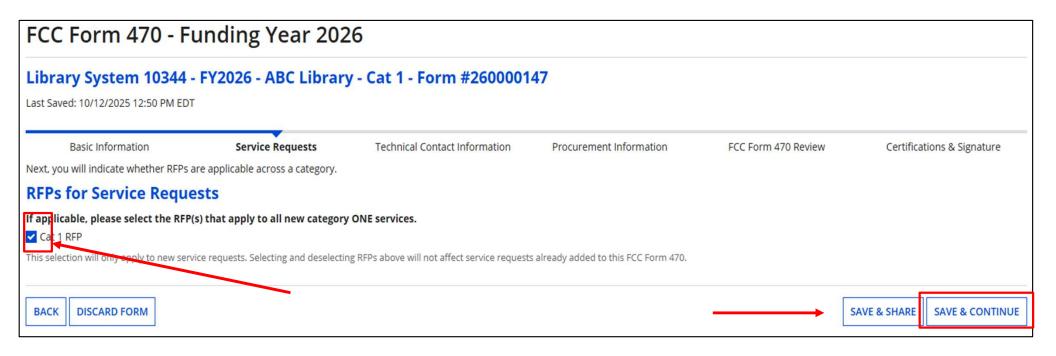
Jane.doe@ohiolibrary.org

740-555-1150

SERVICE: 2 wireless units with data for Library's Bookmobile and Kiosk

Entity 16069826 – Ohio County District Library Bookmobile Entity 17001766 – Ohio County District Library Kiosk – minimum 1 gbps with an unlimited maximum If applying for hotspot service for a bookmobile or kiosk, an RFP is required.

Choose RFP

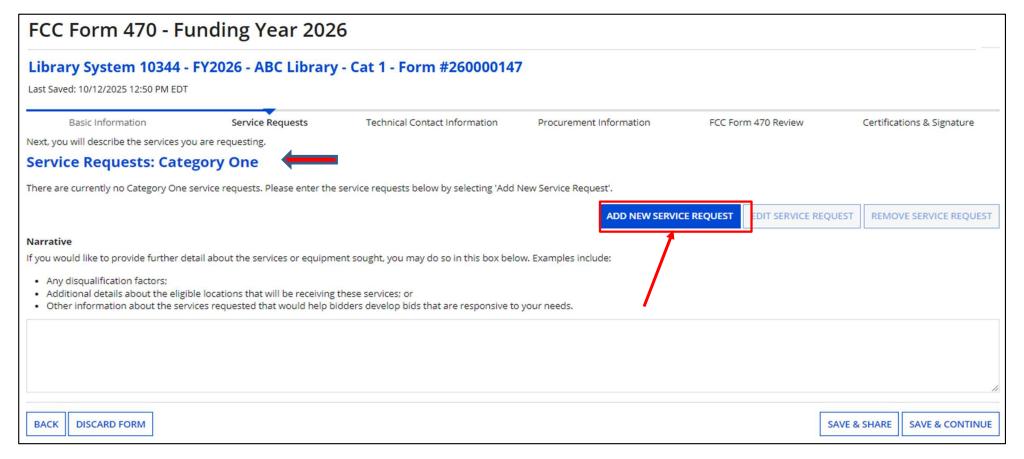


If applicable, select the RFPs that apply to all new Category 1 services.

If you answered "No" previously to RFP's, this screen would not display.

Click on "Save & Continue"

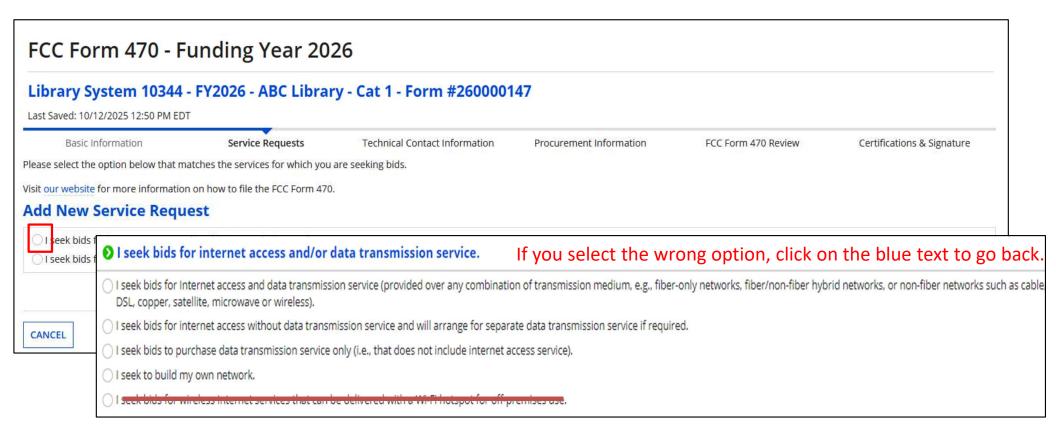
Adding Service Request



Category 1 is displayed first on the page. Click on "Add New Service Request" to add service/s.

You'll explain in the narrative what you're looking for, locations, and disqualification factors. If you uploaded an RFP with the information, you may state "See attached RFP for full details".

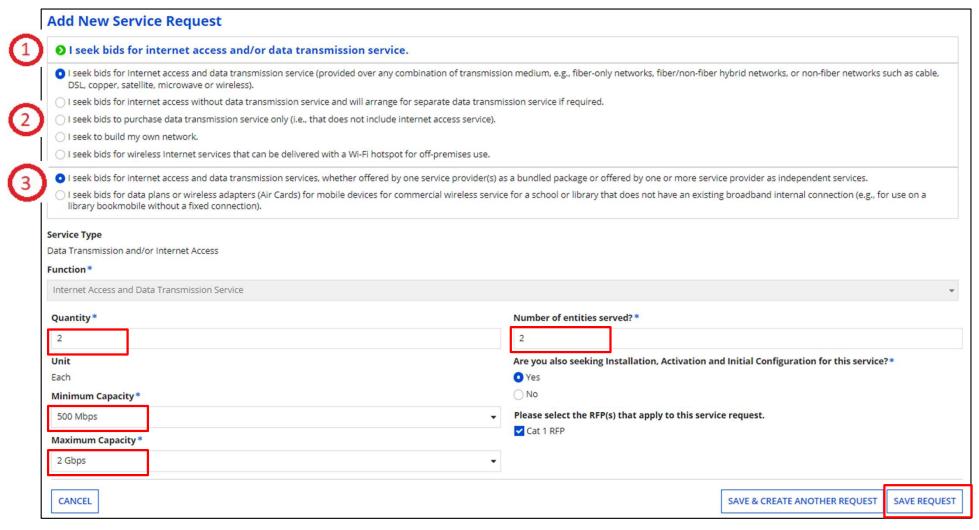
Adding New Service Request



Select the radio button for the service you're requesting. As you select an option that section will collapse, and you will drill down to identify the service further.

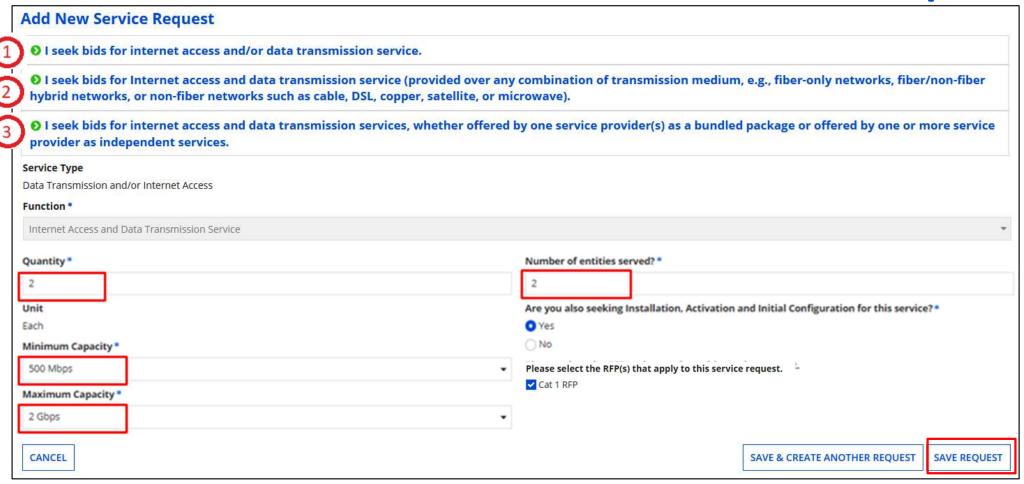
Here are the options.....

Internet Access and Bandwidth Options



Options for selecting both bandwidth and Internet Access as a bundle. Enter the number of circuits, entities, and minimum & maximum capacity. "Maximum" should include for future growth. Indicate if you want installation. If not sure, just say "Yes". RFP should be checked if added.

Internet Access and Bandwidth Request



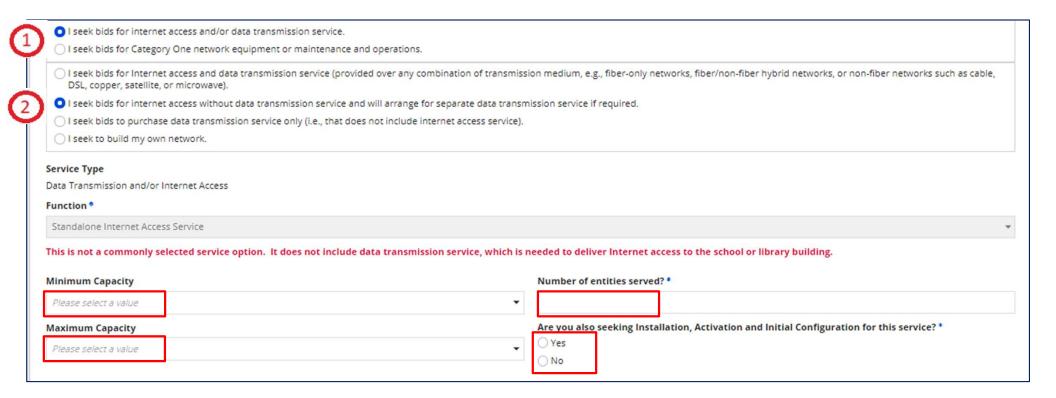
You'll see each of the collapsed options you've chosen along with the quantities and capacity. Click on "Save Request".

If you need to add another request using the **SAME service functions**, you can click on "Save & Create Another Request" and provide quantity, no. of entities, etc., but the collapsed options will be the same. **Not sure when you'd ever use that!!**

Data Plan Options

| | insmission service (provided over any combination of transmission medium, e.g., fiber-only networks, fiber/ ch as cable, DSL, copper, satellite, or microwave). | non-fiber | | | |
|---|--|---------------|--|--|--|
| | a transmission service and will arrange for separate data transmission service if required. | | | | |
| | service only (i.e., that does not include internet access service). | | | | |
| I seek to build my own network. | | | | | |
| I seek bids for internet access and data to provider as independent services. | nsmission services, whether offered by one service provider(s) as a bundled package or offered by one or n | nore service | | | |
| I seek bids for data plans or wireless ada broadband internal connections. | ters (Air Cards) for mobile devices for commercial wireless service for a school or library that does not have | an existing | | | |
| Service Type | Data plans for locations where this is the only option | | | | |
| Data Transmission and/or Internet Access | ransmission and/or internet Access | | | | |
| | for lateract Assess such as a Dealine shile are alicible | _ | | | |
| Function * | for Internet Access, such as a Bookmobile, are eligible | 9. | | | |
| Cellular Data Plan/Air Card Service | An RFP is required in this case. | | | | |
| Cellular Data Plan/Air Card Service Cellular data plans and air cards for mobile lata plans are the most cost-effective opti | , , , , , , , , , , , , , , , , , , , | | | | |
| Cellular Data Plan/Air Card Service Cellular data plans and air cards for mobile data plans are the most cost-effective option | An RFP is required in this case. devices are eligible only in instances when the school or library seeking support demonstrates that to for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* | he individual | | | |
| Cellular Data Plan/Air Card Service Cellular data plans and air cards for mobile data plans are the most cost-effective option Quantity* Unit | An RFP is required in this case. devices are eligible only in instances when the school or library seeking support demonstrates that to for providing internal broadband access for mobile devices at schools and/or libraries. | he individual | | | |
| Cellular Data Plan/Air Card Service Cellular data plans and air cards for mobile data plans are the most cost-effective option Quantity* Unit Lines | An RFP is required in this case. devices are eligible only in instances when the school or library seeking support demonstrates that to for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configu | he individual | | | |
| Cellular Data Plan/Air Card Service Cellular data plans and air cards for mobile data plans are the most cost-effective option Quantity* Unit Lines | An RFP is required in this case. devices are eligible only in instances when the school or library seeking support demonstrates that to for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configurations. | he individual | | | |
| Cellular data plans and air cards for mobile data plans are the most cost-effective option Quantity * Unit Lines Minimum Capacity * | An RFP is required in this case. devices are eligible only in instances when the school or library seeking support demonstrates that to for providing internal broadband access for mobile devices at schools and/or libraries. Number of entities served?* Are you also seeking Installation, Activation and Initial Configurations service?* Yes | he individual | | | |

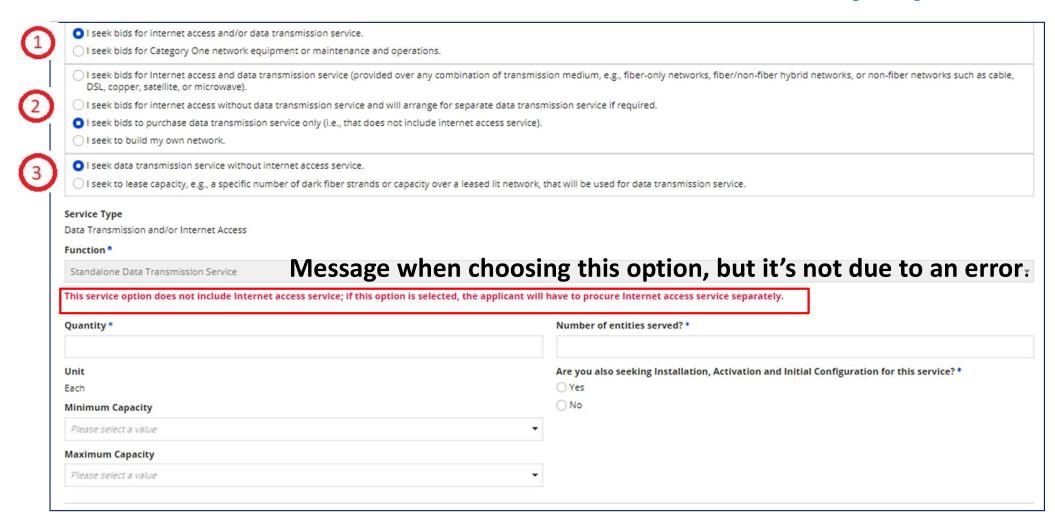
Internet Access Only Options



Option for selecting just Internet Access when priced separately, such as when circuits between buildings are owned by the library system. **Libraries don't often choose this option!**

Enter the number of entities and minimum and maximum capacity. Indicate if you want installation. Same applies, if not sure, just say "Yes".

Bandwidth Only Options

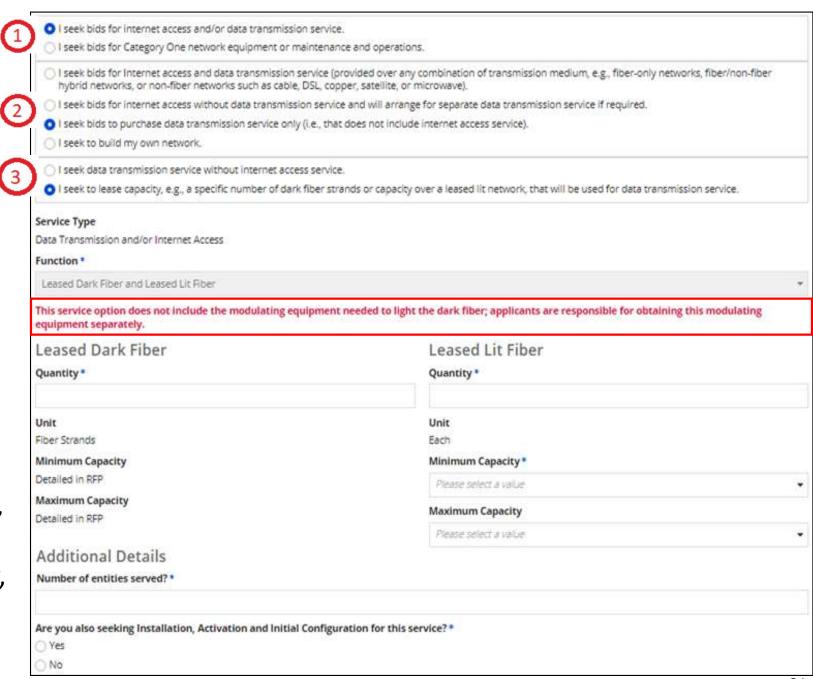


Options for selecting just bandwidth if Internet is provided or priced separately, such as libraries where Internet Access is provided by OPLIN. Enter the number of circuits, entities, and minimum & maximum capacity. "Maximum" should include for future growth. Indicate if you want installation. Same applies, if not sure, just say "Yes".

Dark Fiber Options

Options if seeking Dark Fiber, where provider owns and maintains the fiber, but you're required to light it. If so, an RFP is required stating capacity, and you must compare Leased Lit Fiber cost.

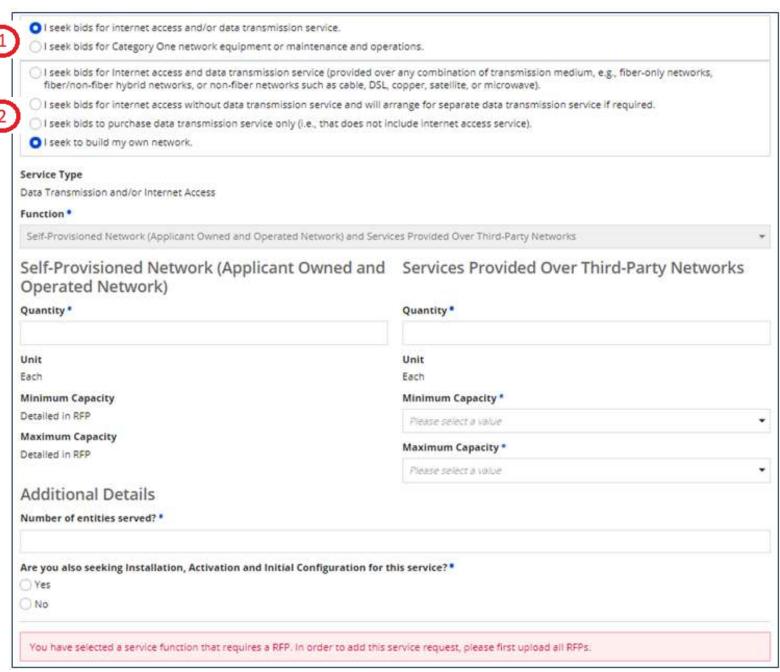
Enter the number of circuits, entities, and minimum & maximum capacity, and if seeking installation.



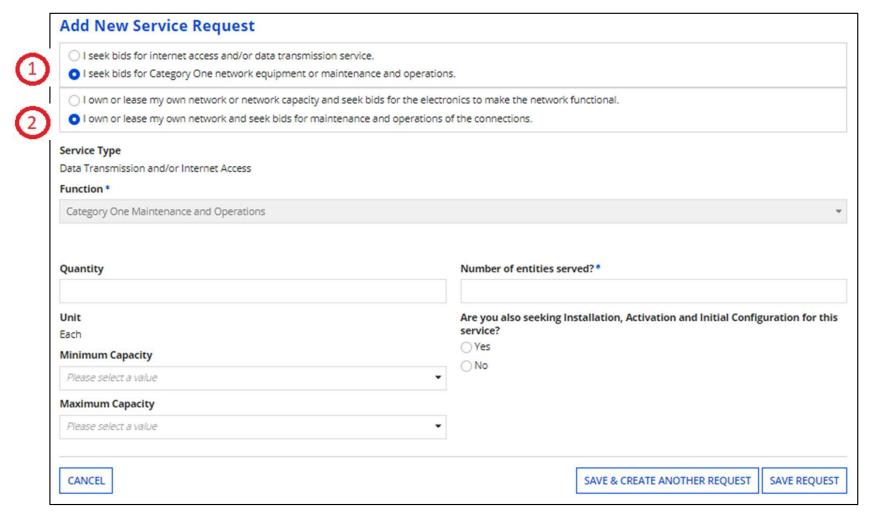
Self Provisioned Network Options

Self-Provision is when the applicant owns the fiber, lights it, and maintains it. Again, Libraries don't often choose this option!

If seeking, an RFP is required with capacity, and you must compare it to other options such as Leased Lit Fiber, microwave, etc.

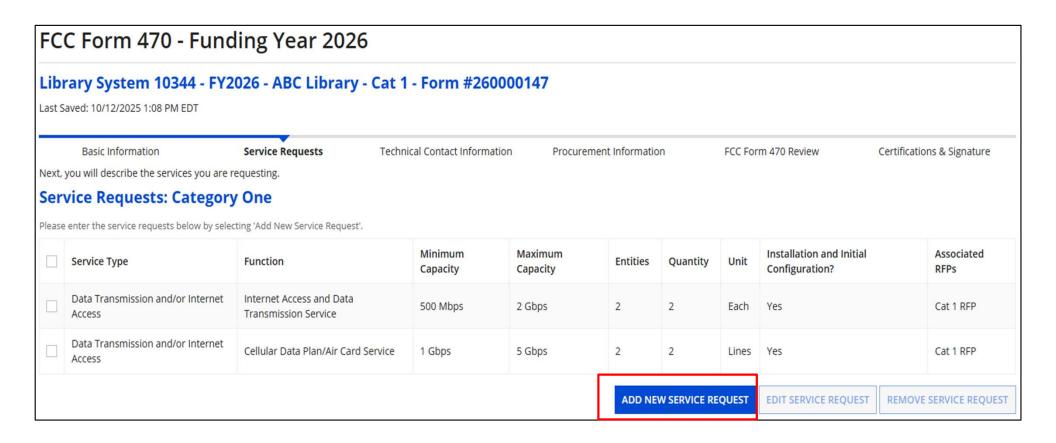


Maintenance/Operations Options



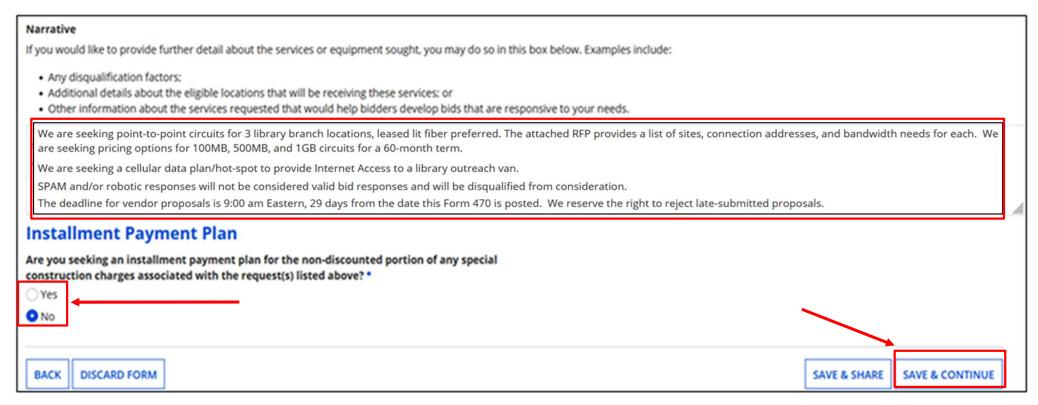
If requesting Maintenance and Operations of existing Dark Fiber circuits where only M&O will be charged. Enter the quantity, number of entities served, and minimum & maximum capacity. Indicate if you want installation. Same applies, if not sure, just say "Yes".

Adding New Service Request



Verify information. If you want to add additional Category 1 services, click on "Add New Service Request". If done, provide information in the Narrative text box.

Narrative & Installment Plans

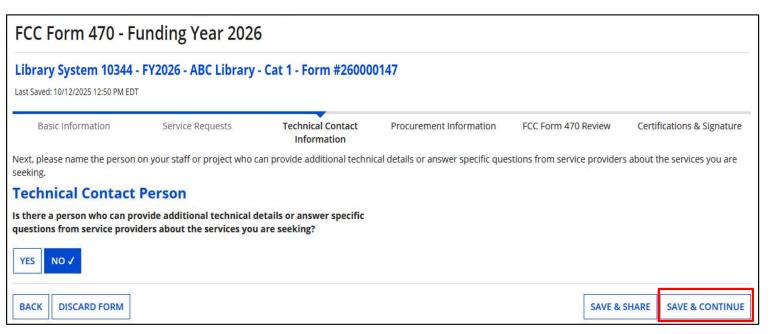


Provide any further details in the narrative to explain what you're looking for, locations, and any disqualification factors. You may state your preferred bandwidth but be careful there.

If seeking fiber installation with special constructions charges, you may request a payment plan for the "non discount" portion.

Click on "Save & Continue".

Adding Technical Contact



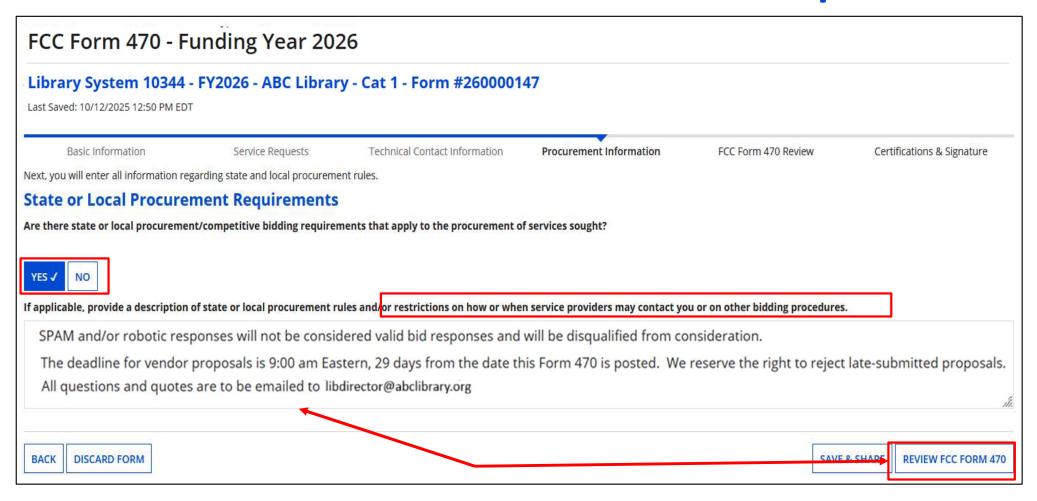
Choose "Yes" if you'd like to add a technical contact.

You can search and add an EPC user or manually enter contact details.

Do not add anyone affiliated with a service provider!!

| Technical Contact Person | | | |
|--|---------------------------------------|--|--|
| Is there a person who can provide additional technical details or answer specific questions from service providers about the services you are seeking? | First Name * | | |
| YES V NO | Last Name * | | |
| How would you like to enter the technical contact details? | Phone Number * Phone Number Extension | | |
| SEARCH EPC SYSTEM ENTER DETAILS MANUALLY | | | |
| | | | |
| | Re-enter Email * | | |
| BACK DISCARD FORM | SAVE & SHARE SAVE & CONTINUE | | |

Procurement Requirements



Indicate if there are State or Local procurement requirements, or any restrictions. You can list any disqualifying factors in addition to the Narrative.

Click on "Review FCC Form 470"

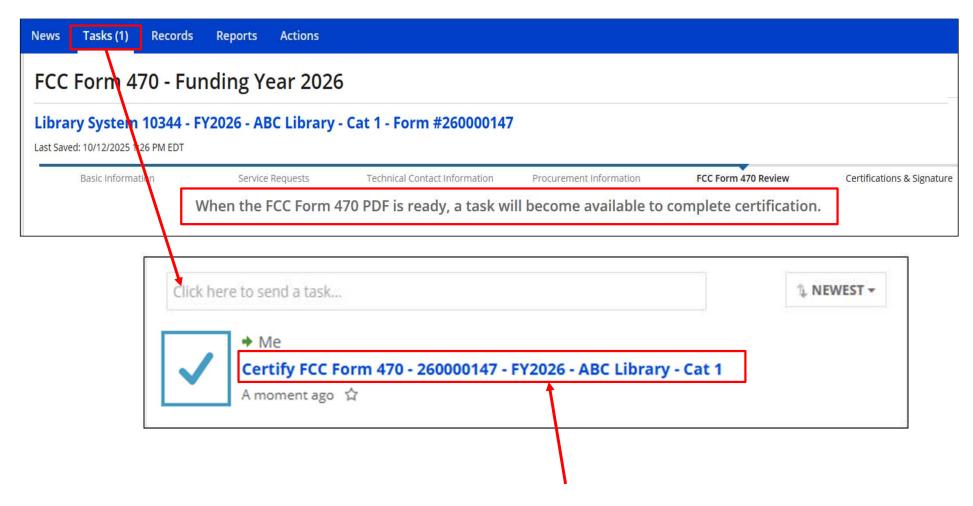
Procurement Requirements

- Vendor must have a SPIN at the time of awarding the contract.
- In-state (or local) vendors preferred.
- Previous experience with vendor preferred.
- Vendor must put in writing their willingness to give discounted bills.
- Must demonstrate the ability to meet the installation timeline.
- SPAM and/or robotic responses will not be considered valid bid responses and will be disqualified from consideration.
- The applicant reserves the right to reject bids that are received on or after 9:00 AM on the Allowable Contract Date shown on the Form 470.

A Word doc listing Disqualifying Factors can be found on my "Resource Library" page at

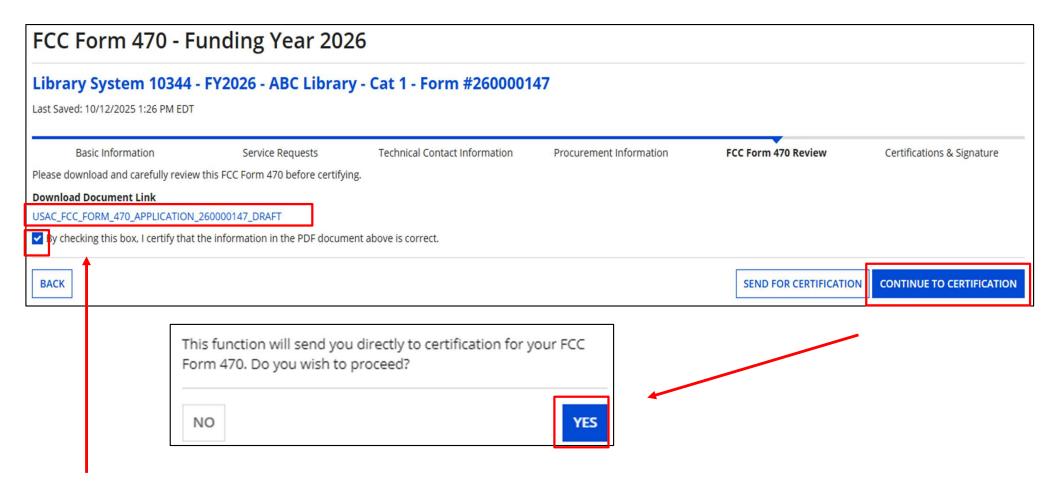
https://www.ohio-k12.help/e-rate-support/resource-library/.

Review Form 470



When you advance to this screen, your Form 470 is generated as a "Task". Click on "Tasks" and then the item labeled as "Certify FCC Form 470" with the nickname you provided.

Certifying Form 470



Click on the document link to view the PDF. If correct, click box to certify. If not, click on "Back" to make corrections.

If you have the authority to certify application, click on "Continue to Certification" and choose "Yes" in the pop-up. Choose "Send for Certification" if someone else will certify.

Certify FCC Form 470

Library System 10344 - FY2026 - ABC Library - Cat 1 - Form #260000147

Last Saved: 10/12/2025 1:26 PM EDT

Rasic Information Service Requests

Technical Contact Information

Procurement Information

FCC Form 470 Review

Certifications & Signature

Please complete the certifications below. **Applicant Certifications**

I certify that the applicant includes schools under the statutory definitions of elementary and secondary schools found in the No Child Left Behind Act of 2001, 20 U.S.C. §§ 7801 (18) and (38), that do not operate as forprofit businesses, and do not have endowments exceeding \$50 million.

Other Certifications

- ✓ I certify that this FCC Form 470 and any applicable RFP will be available for review by potential bidders submitted will be carefully considered and the bid selected will be for the most cost-effective service of educational needs and technology goals.
- ✓ I certify that I will retain required documents for a period of at least 10 years (or whatever retention period) funding year or the service delivery deadline for the associated funding request. I certify that I will retail for, receipt of, and delivery of services receiving schools and libraries discounts. I acknowledge that I m
- ✓ I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding requ form may be punished by fine or forfeiture, under the Communications Act, 47 U.S.C. §§ 502, 503(b), or
- ✓ I acknowledge that FCC rules provide that persons who have been convicted of criminal violations or h subject to suspension and debarment from the program.
- ✓ I certify that the services the applicant purchases at discounts provided by 47 U.S.C. § 254 will be used for money or any other thing of value, except as permitted by the Commission's rules at 47 C.F.R. § 54. promise of anything of value, other than services and equipment sought by means of this form, from t

False statements on this form may result in civil liability and/or criminal prosecution. To electronically sign and certify this form, click "Yes" below. To affirm that you (1) understand the statements above and (2) represent the entity featured, and have the authority to make the certifications, on this form, click "Yes" below.

NO

I acknowledge that support under this support mechanism is conditional upon the school(s) and/or library(ies) I represent securing access, separately or through this program, to all of the resources, including computers, training, software, internal connections, maintenance, and electrical capacity necessary to use the services purchased effectively. I recognize that some of the aforementioned resources are not eligible for support. I certify that I have considered what financial resources should be available to cover these costs. I certify that I am authorized to procure eligible services for the eligible entity(ies). I certify that I am authorized to submit this request on behalf of the eligible entity(ies) listed on this form, that I have examined this request, and to the best of my knowledge, information, and belief, all statements of fact contained herein are true.

NOTICE

In accordance with Section 54.503 of the Federal Communications Commission's ("Commission") rules, certain schools and libraries ordering services that are eligible for and seeking universal service discounts must file this Description of Services Requested and Certification Form (FCC Form 470) with the Universal Service Administrator, 47 C.F.R. § 54,503. The collection of information stems from the Commission's authority under Section 254 of the Communications Act of 1934, as amended, 47 U.S.C. 1954. The data in the report will be used to ensure that schools and libraries comply with the competitive bidding requirement contained in 47 C.F.R. § 54,503. Schools and libraries must file this form themselves or as part of a consortium.

An agency may not conduct or sponsor, and a person is not required to respect to, a collection of information unless it displays a currently valid OMB control number.

The FCC is authorized under the Communications Act of 1934, as amended, to collect the information requested in this form. We will use the information you provide to determine whether you have complied with the competitive bidding requirements applicable to requests for universal service discounts. If we elieve there may be a violation or a potential violation of any applicable statute, regulation, rule or order, the information you provide in this form may be referred to the Federal, state, or local agency responsible for investigating prosecuting, enforcing, or implementing the statute, rule, regulation or order. In certain cases, the information you provide in this form may be disclosed to the Department of Justice or a court or adjudicative body when (a) the FCC; or (b) any employee of the FCC; or (c) the United States Government is a party of a proceeding before the body or has an interest in the proceeding. In addition, information provided in or submitted with this form, or in reconse to subsequent inquiries, may also be subject to disclosure consistent with the Communications Ac of 1934, FCC regulations, the Freedom of Information Act. 5 U.S.C. § 552, or other applicable law,

If you owe a past due debt to the federal government, the information you provide in this form may also be disclosed to the Department of the Treasury Financial Management Service, other Federal agencies and/or your employer to offset your salary, IRS tax refund or other payments to collect that debt. The FCC may also provide the information to these sencies through the matching of computer records when authorized.

If you do not provide the information we request on the form, the FCC or Universal Service Administrator may return your form without action or egy a related request for universal service discounts.

The foregoing Notice is required by the Paperwork Reduction Act of 1995, Pub. L. No. 104-13, 44 U.S.C. § 3501, et seq.

Public reporting burden for this collection of information is estimated to average 3.5 hours per response, including the time for reviewing instructions, searching exists a data sources, gathering and maintaining the data needed, completing, and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the reporting bur to the Federal Communications Commission, Performance Evaluation and Records Management, Washington, DC 20554. We also will accept your comments via the email if you see them to PRA@FCC.gov. DO NOT SEN COMPLETED WORKSHEETS TO THESE ADDRESSES.

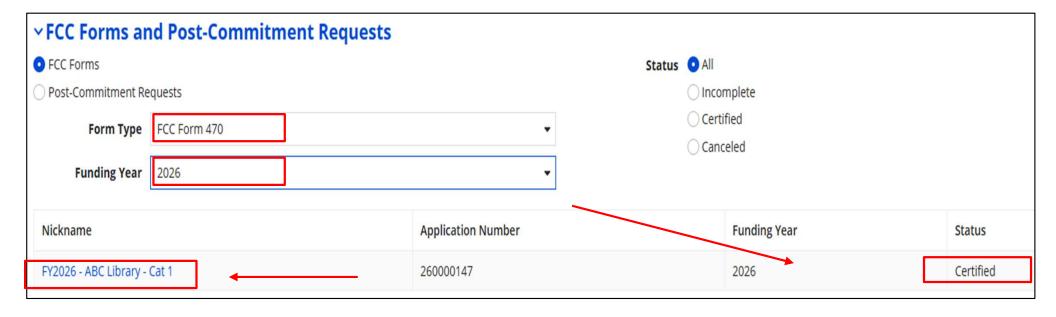
Check each box, and click on "Certify", and then "Yes" to complete the application.

Certifying

Form

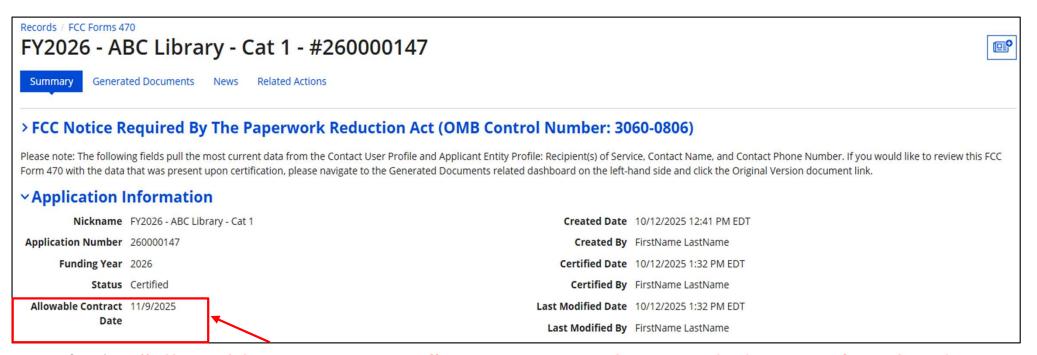


Viewing/Editing Form 470

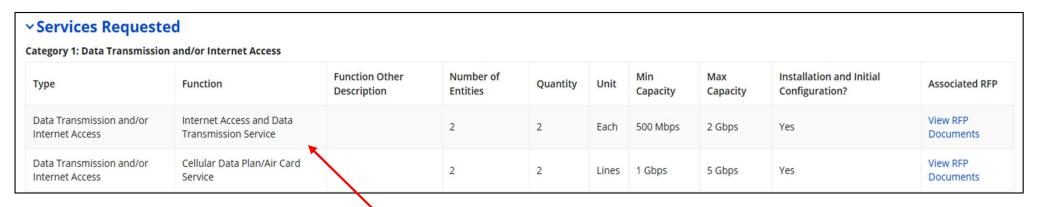


To find the Form 470, go to the bottom of the Landing Page and search. Select **2026** for the funding year. Verify the status is listed as "Certified". It may take several minutes after submitting the Form 470 for the status to update from "Incomplete" to "Certified". Click on the Nickname to see a summary of the application.

Viewing/Editing Form 470



Verify the "Allowable Contract Date". Contracts can be awarded on or after this date.



Verify the services listed.

Viewing/Editing Form 470



Click on "Related Actions" for a list of options for corrections/changes. The two highlighted in red above are newer options: the ability to add an RFP or cancel the Form 470.

If you make a "cardinal change" (such as adding a new service or quantity), the 28-day waiting period must restart. The portal will ask if that is the case, and if you indicate "Yes", the Allowable Contract Date will adjust.

Bid Evaluation Sample

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

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

 Be sure to date and add a statement such as "based on the above criteria, we have chosen Vendor 3".

Bid Matrix Evaluation Category 1

Insert Insert Insert **Points** Factor Name of Name of Name of **Available** Vendor Vendor Vendor Price of the ELIGIBLE goods 70 and services Prior experience w/ vendor 20 Prices for ineligible services, 10 products & fees Total 100

Bid Evaluation Letter

For a template of my sample letter, go to my "Resource Library" page at https://www.ohio-k12.help/e-rate-support/resource-library/.



That's the Form 470 in a nutshell!

Any questions?

Where to Go for E-Rate Help

- USAC's Client Service Center (CSC)
 - E-Rate "Help Desk" where applicant & service providers can get answers to questions
 - Call 888-203-8100
 - Submit a 'Customer Service Case' in EPC



E-Rate Coordinator

- E-mail Lorrie Germann at <u>lorrie.germann@education.ohio.gov</u>
- Call: 740-253-1153
- Attend webinars!
- https://www.ohio-k12.help/E-Rate-support (Note new URL!!)
- Subscribe/read listserve messages! (If you've had issues receiving my emails, please subscribe again!!)
- Helpful Documents: https://www.ohio-k12.help/E-Rate-support/resource-library/
- Training: https://www.ohio-k12.help/E-Rate-support/E-Rate-events/