

FY2026 Form 470 Cat 2 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 2
 - Internal Connections
 - Managed Internal Broadband Service
 - Basic Maintenance
- 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 which was established in a previous year's Form 470.

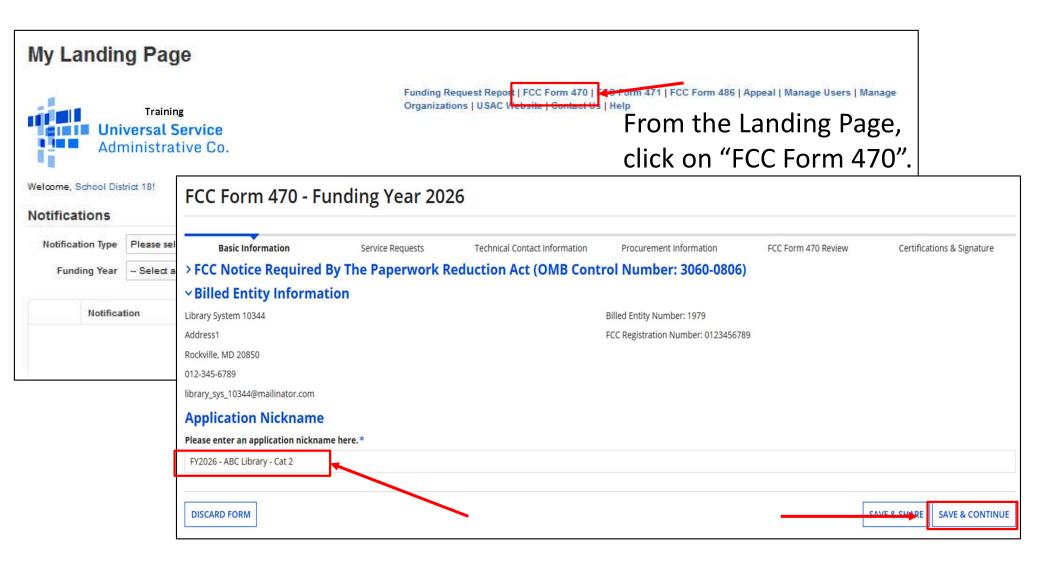
Note: This applies only to the services you are receiving in a multi-year contract.

You must still file a 470 for everything else!

Form 470 - After Submission Changes

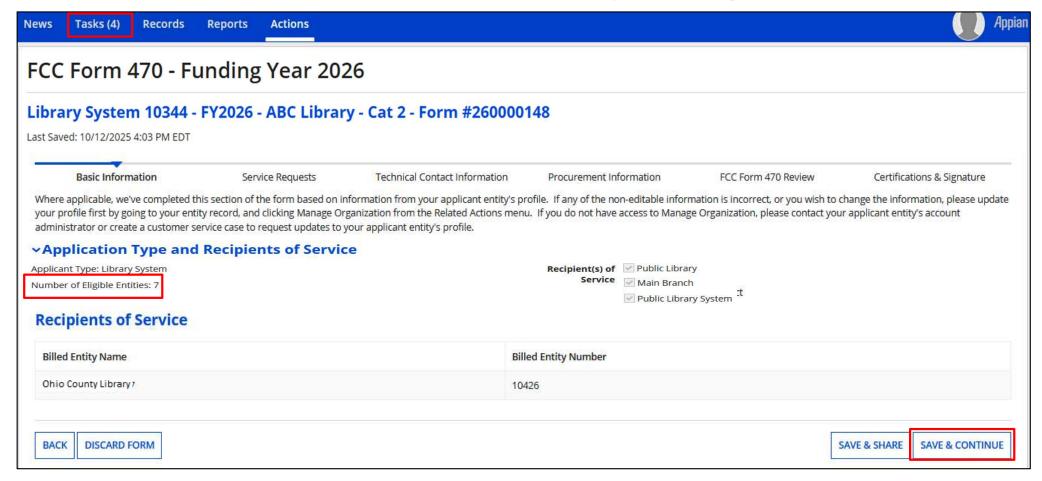
- Ability To Upload RFP Documents After Certification.
 - Applicants can upload an RFP (request for proposals) after the FCC Form 470 is submitted and certified in EPC, but cannot remove RFP documents attached to your FCC Form 470.
 - If the new RFP changes the service originally requested (increasing 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"

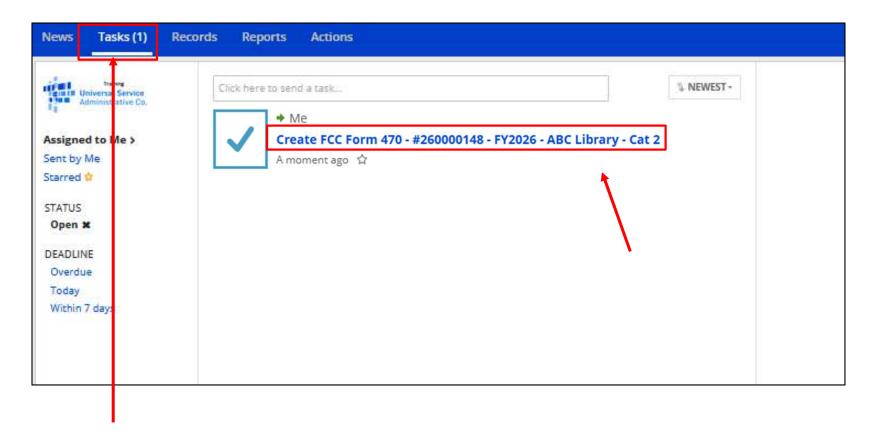
Completing the Form 470



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.

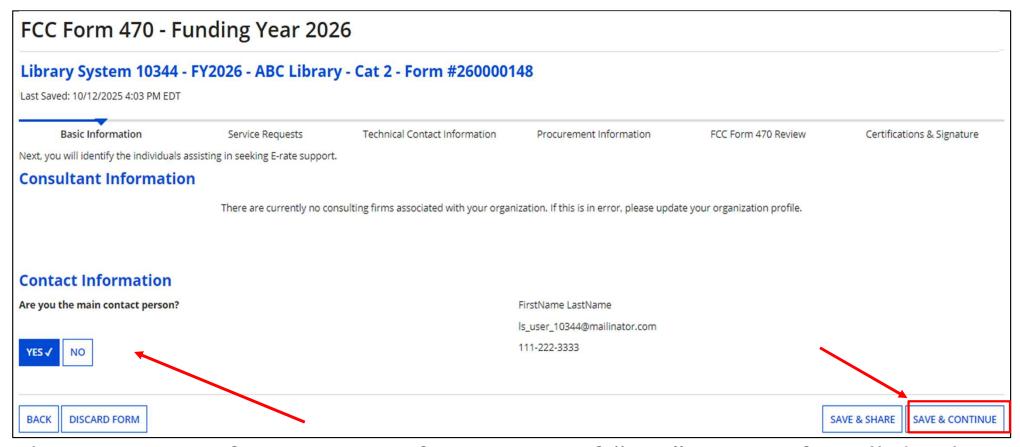
Tasks



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".

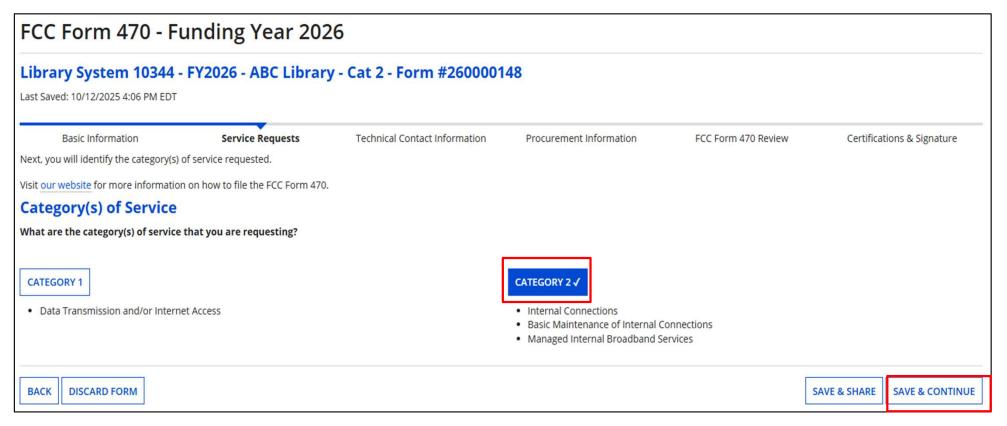
Contact Information



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

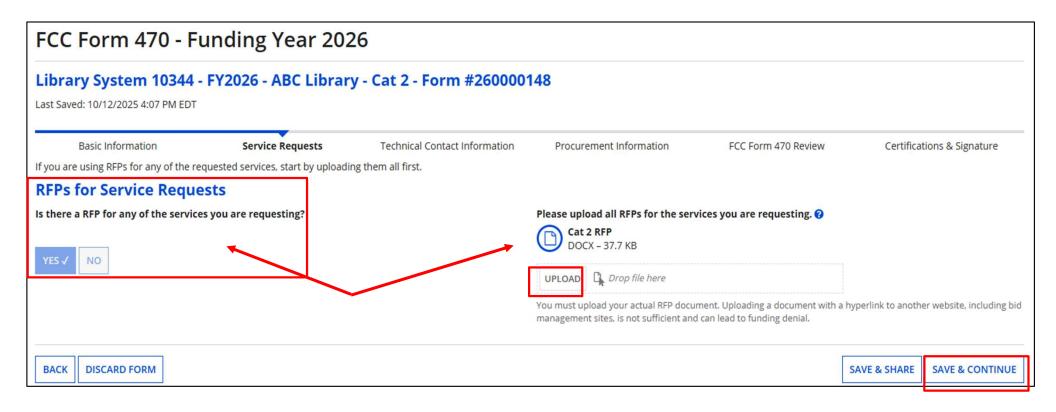
If someone else will be the main contact, choose "No" and provide their information. Keep in mind they must have a portal account.

Choosing Category of Service



Choose "Category 2".

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 2:

Item Description	Quantity	Unit Price	Total
Cisco Meraki MR42 Cloud Managed or Equivalent	207		
Cisco Meraki Enterprise Cloud Controller or Equivalent - Subscription license (5 years)	207		
Cisco Catalyst 3850-12XS-S or Equivalent	1		
Cisco Catalyst 3850-48F-S or Equivalent	6		
Cisco Catalyst 3850-24P-S or Equivalent	1		
Cisco Catalyst 2960X-48FPD-L or Equivalent	19		
Cisco Catalyst 2960X-24PD-L or Equivalent	1		
Cisco FlexStack-Plus Network stacking module or Equivalent	19		

Don't forget to add the "or equivalent"!

Choose RFP

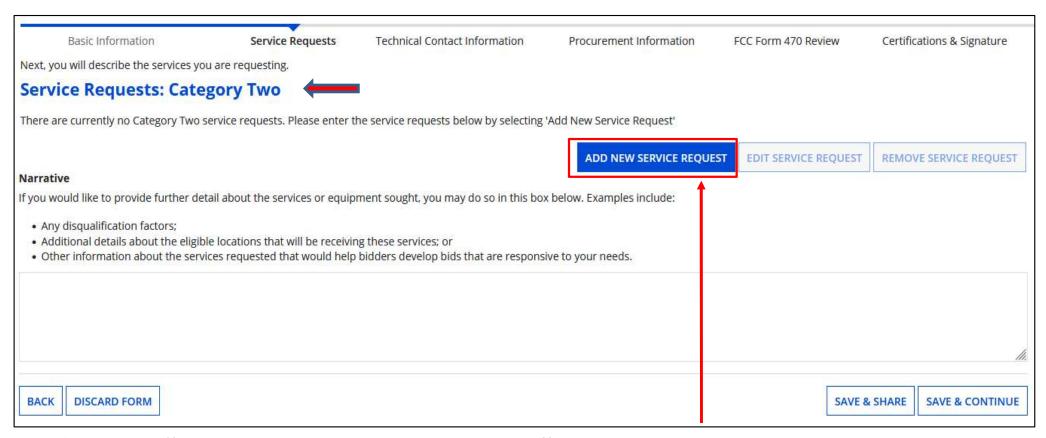


If applicable, select the RFPs that apply to all new Category 2 services.

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

Click on "Save & Continue"

Requesting Category 2 Services



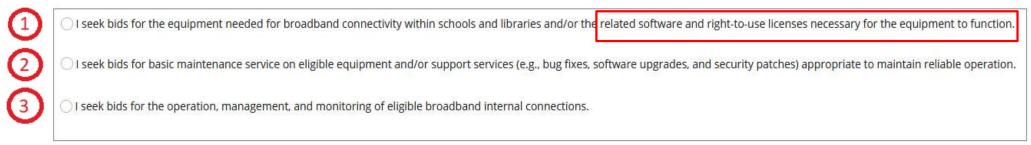
Click on "Add New Service Request" to start.

Note: while E-Rate will only fund Category 2 requests for schools, you may include items on the 470 for bidding purposes that will go into a NIF.

Requesting Category 2 Services

Next, you will describe the services you are requesting.

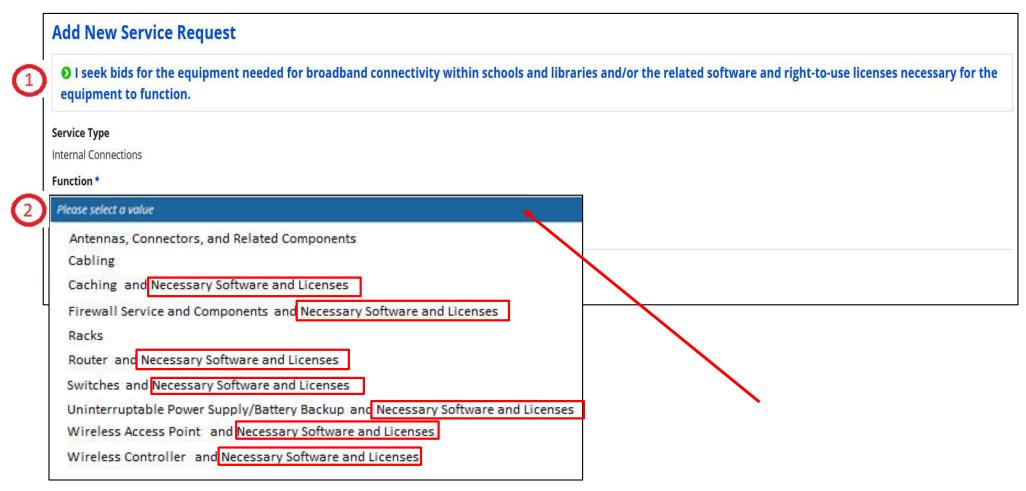
Add New Service Request



CANCEL

- Select this option if seeking Internal Connections equipment. This includes license.
- Select this option if seeking basic maintenance service of eligible equipment.
- Select this option if seeking Managed Internal Broadband Service (MIBS)

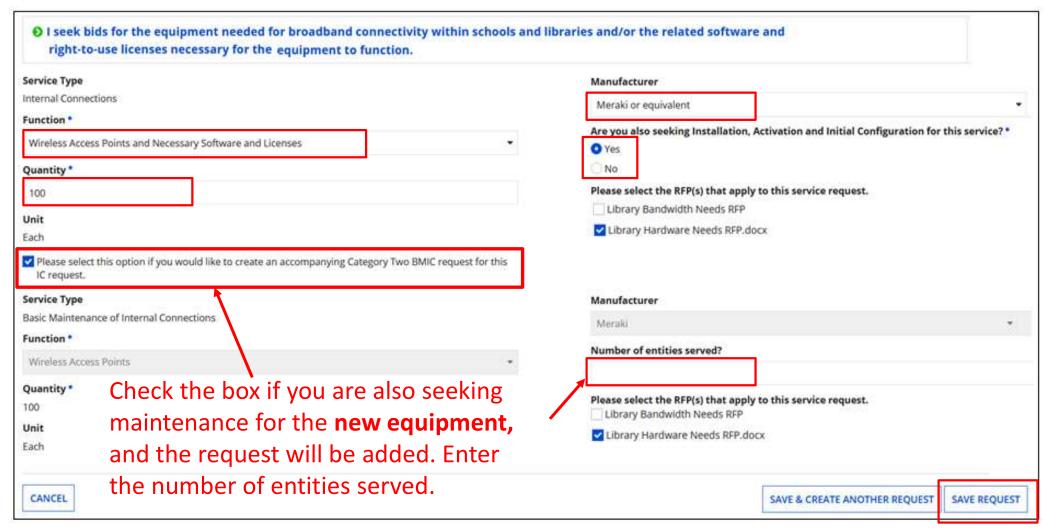
Requesting Internal Connections



Select the first option to choose Internal Connections, and then click on the "Function" pull-down to choose a value.

"Software and Licenses" language is listed where applicable for hardware.

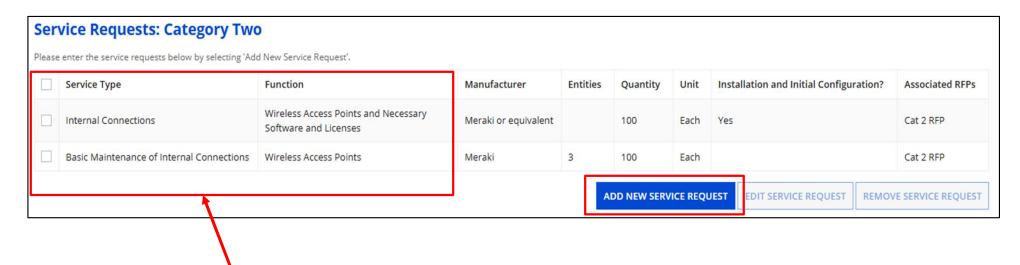
Requesting Internal Connections



After selecting "Function", enter quantity, select preferred Manufacturer, and select "Yes" if you are seeking Installation, Activation, and Configuration.

If also seeking Basic Maintenance for the hardware chosen, check the box and enter the number of entities it will serve. The "Function", "Quantity", and "Manufacturer" are provided for you. Click on "Save Request"

Adding Category 2 Services

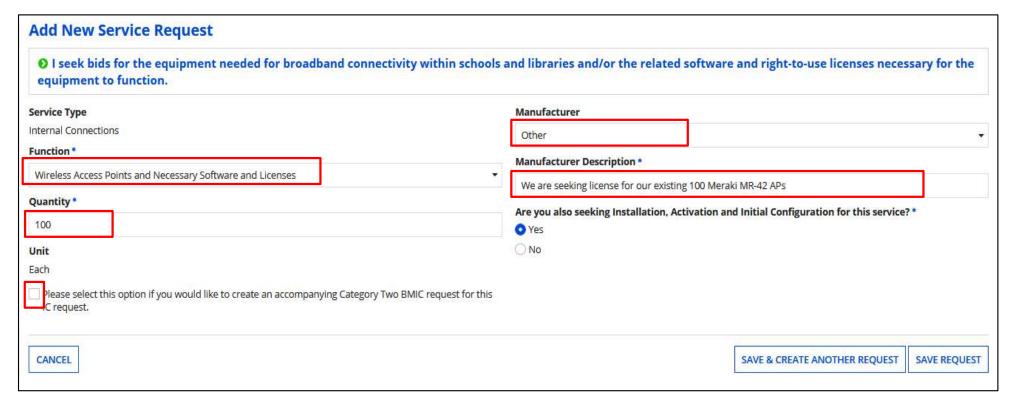


Note: The Access Points are now listed under both IC and BMIC.

Click "Add New Service Request" to continue adding additional services. Remember, if it's not on the 470, you cannot get it funded on the 471.

You can also choose to "Edit" or "Remove" requests if needed by checking the box to the left of the item and then click "Edit Service Request" or "Remove Service Request".

Adding Category 2 Renewal License

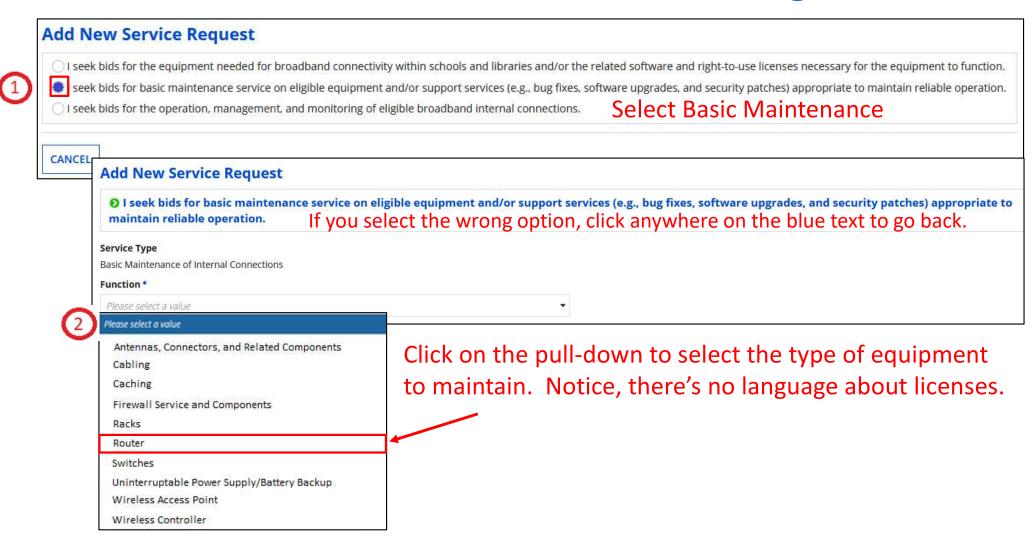


If you already own the hardware but need to renew licenses, you may add them by choosing the "Function" or type of hardware the license is for. Under "Manufacturer," choose "Other" and describe. If requesting a license for existing hardware, it's o.k. to state the model. Also, check the box to request the renewal under BMIC in case some level of maintenance is included. This guidance is based on current rules, which may change with the new FY2026 ESL.

Explain in the narrative that you are seeking the license under both IC and BMIC because as it's unclear which Service Type they may fall under.

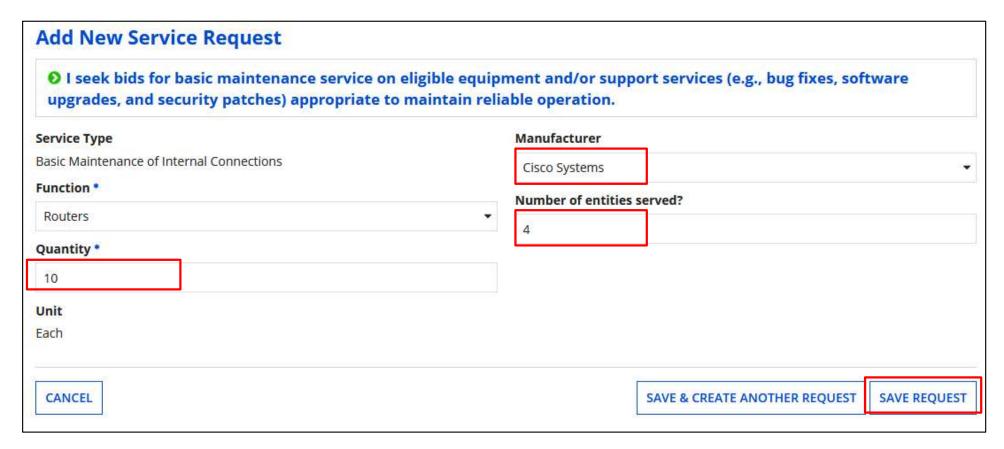
Enter "Quantity" and if you are seeking Installation. Click on "Add."

Adding Basic Maintenance for Existing Hardware



Here you are only requesting maintenance, not the actual purchasing of the equipment.

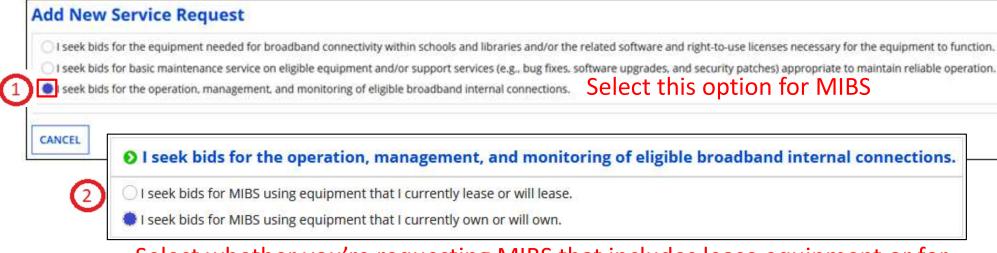
Adding Basic Maintenance for Existing Hardware



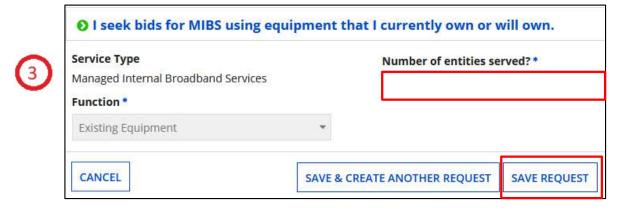
Select manufacturer of hardware to be maintained, the quantity, and how many entities will be served.

Click on "Save Request"

Adding Managed Internal Broadband Service (MIBS)

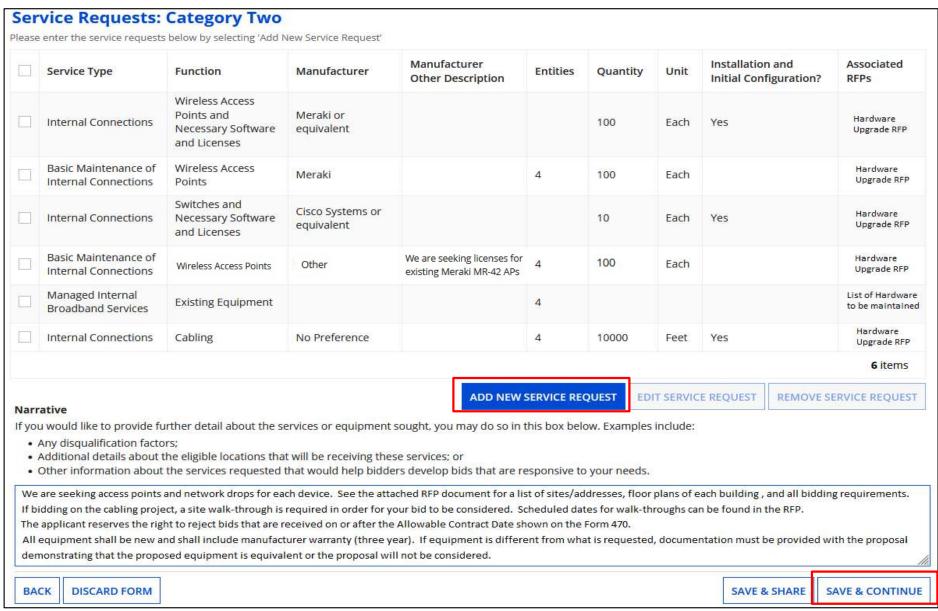


Select whether you're requesting MIBS that includes lease equipment or for equipment currently or will be owned.



For either option, enter the number of entities served and click on "Save Request".

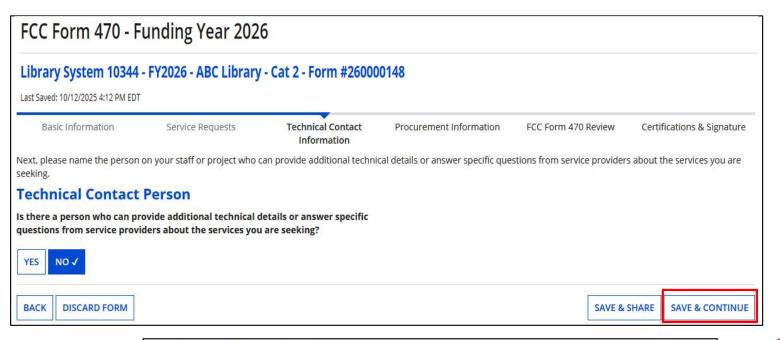
Adding Category 2 Services



Make sure all items/services are listed and verify they are under the correct "Service Type". "Edit" or "Remove" requests if needed by clicking the box to the left of the item.

Add a narrative to provide detail. Click on "Save & Continue"

Adding Technical Contact



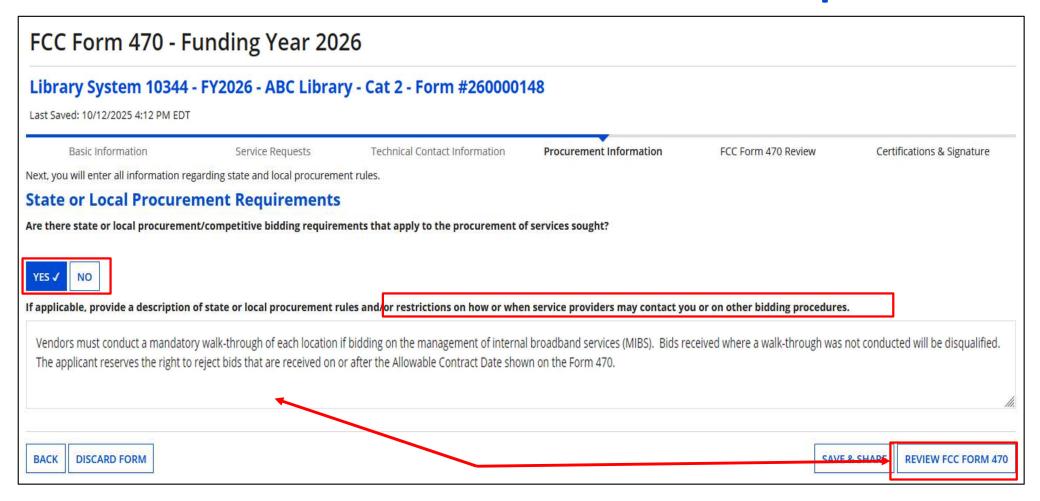
Choose "Yes" if you'd like to add a technical contact.

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 ✓ NO	Last Name * Title		
How would you like to enter the technical contact details? SEARCH EPC SYSTEM ENTER DETAILS MANUALLY			
	Phone Number *		
	Phone Number Extension		
	Email *		
	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.

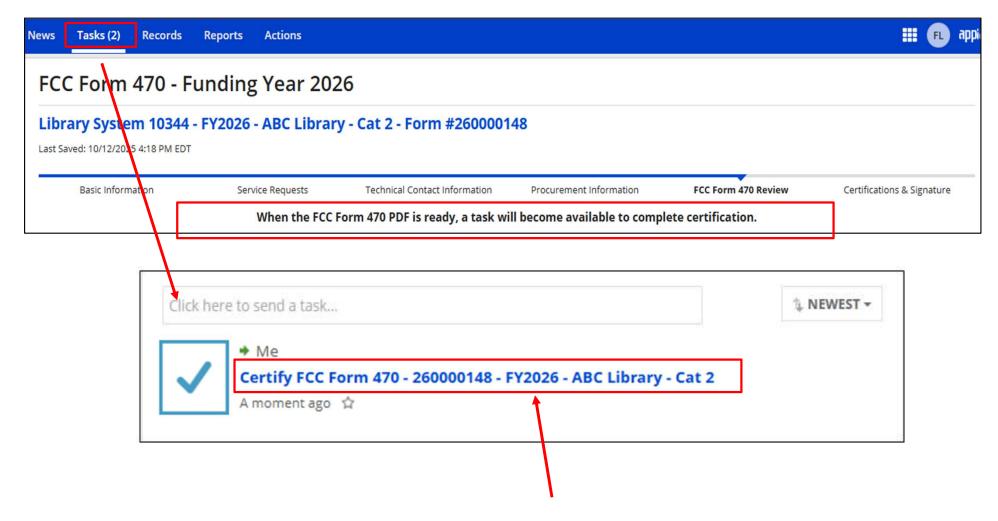
Click on "Review FCC Form 470"

Procurement Requirements

- All hardware quoted must be compatible with existing infrastructure.
- Hardware quoted must be new with the manufacturer's warranty. Quotes for used equipment will not be considered.
- Vendor must have a SPIN at the time of awarding the contract.
- Cabling vendors must be bonded/insured.
- Vendor must ensure that all quoted prices will be honored at the time of purchase.
- All vendors must conduct a walk-through of each location if bidding on the cabling project, and all quotes must include all cabling material, necessary components, and installation costs to complete the project.
- Vendor must demonstrate they are a valid reseller of products quoted.
- In-state (or local) vendors preferred.
- Previous experience with vendor preferred.
- Vendor must put in writing their willingness to give discounted bills.
- Must demonstrate the ability to meet the installation timeline.
- The applicant reserves the right to reject bids that are received on or after the Allowable Contract Date shown on the Form 470.

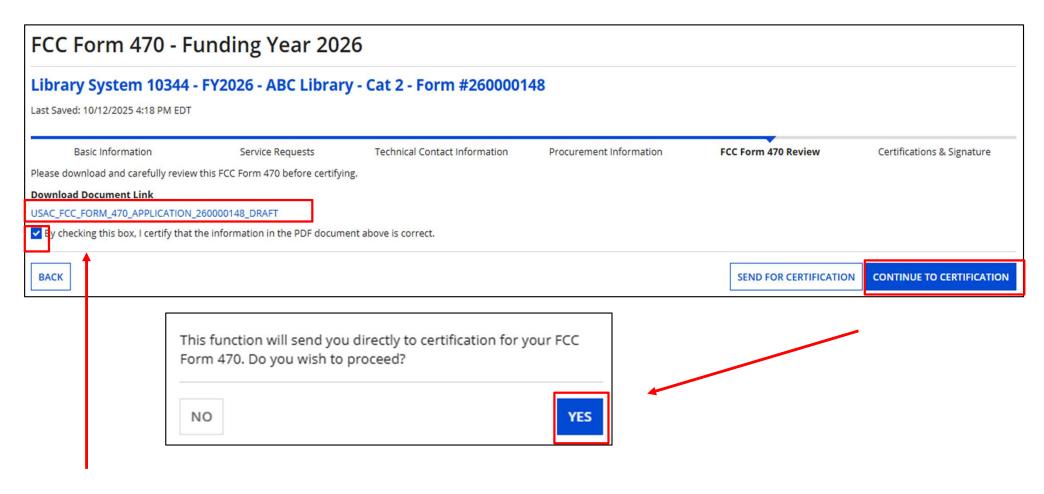
A Word doc listing Disqualifying Factors can be found on my "Resource Library" page at https://www.ohio-k12.help/e-rate-support/resource-library/.

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 2 - Form #260000148

Last Saved: 10/12/2025 4:18 PM EDT

Basic Information Service Requests

Requests Technical Contact Information

Procurement Information FCC Form 470 Review

Certifications & Signature

Certifying Form

Please complete the certifications below.

Applicant Certifications

I certify that the applicant includes schools under the statutory definitions of elementary and secon profit 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 bidd submitted will be carefully considered and the bid selected will be for the most cost-effective service educational needs and technology goals.
- I certify that I will retain required documents for a period of at least 10 years (or whatever retention funding year or the service delivery deadline for the associated funding request. I certify that I will re for, receipt of, and delivery of services receiving schools and libraries discounts. Lacknowledge that
- I certify that I have reviewed all applicable FCC, state, and local procurement/competitive bidding re form may be punished by fine or forfeiture, under the Communications Act, 47 U.S.C. §§ 502, 503(b)
- I acknowledge that FCC rules provide that persons who have been convicted of criminal violations o 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 usfor money or any other thing of value, except as parenitted by the Commission's rules at 47 C.F.R. § promise of anything of value, other than services and be ulpment sought by means of this form, from services.

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

YES

☑ 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 tracity 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 subject this request on behalf of the eligible entity(ies) listed on this form, that I have samined 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 fill this Description of Services Requested and Certification Form (FCC Form 470) with the Universal Service Absolutionistrator, 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. § 254. 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 respond to, a collection of information unless; 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 believe there may be a 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 response to subsequent inquiries, may also be subject to disclosure consistent with the Communication 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 Cancial 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 agencies through the matching of computer records when authorized.

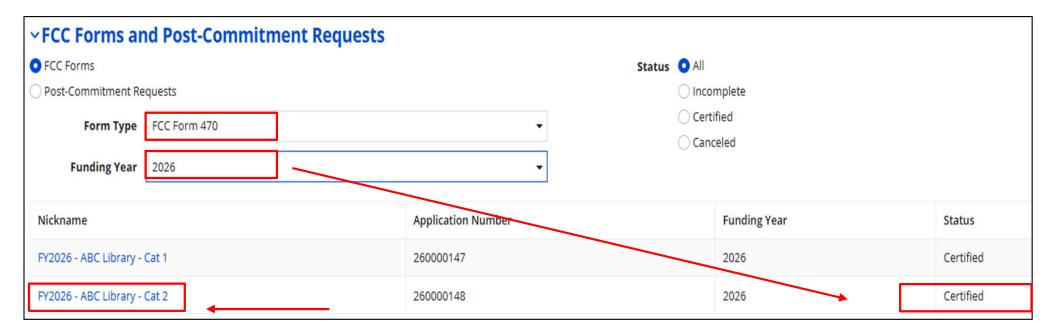
If you do not provide the information we request on the form, the FCC or Universal Service Administrator may return your form without action or deny a related recess for universal service discounts

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 existing data sources, gathering and maintaining the dala 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 burden to the Federal Communications Commission, Performance Evaluation and Records Management, Washington, DC 20554. We also will accept your comments via the email if you send their to PRA@FCC.gov. DO NOT SEND COMPLETED WORKSHEETS TO THESE ADDRESSES.

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

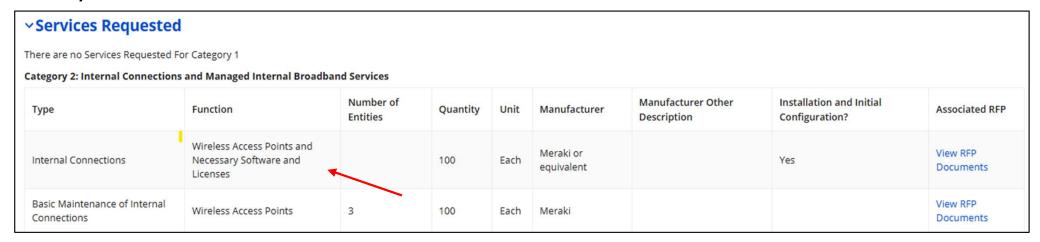




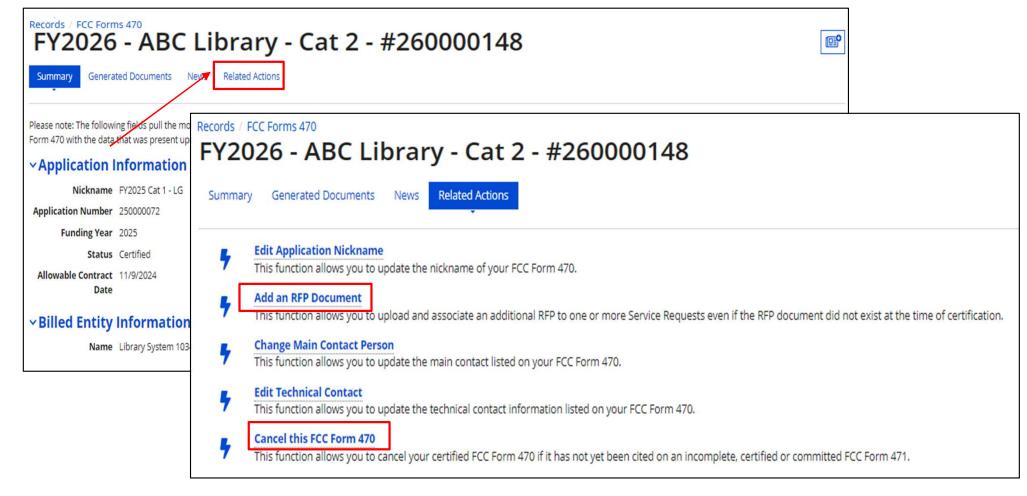
To find the Form 470, go to the bottom of the Landing Page and search. Select **2026** for the funding year. Verify the status is listed as "Certified". It may take several minutes after submitting the Form 470 for the status to update from "Incomplete" to "Certified". Click on the Nickname to see a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



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



Verify the services listed.



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.

Records / FCC Forms 470 FY2FY2026 - ABC Library - Cat 2 - #260000148 **Upload RFP** Generated Documents Summary Changes to the FCC Form 470, including uploading a new RFP document, may require applicants to restart the 28-day waiting period before selecting a service provider, signing a contract, or submitting and certifying an FCC Form 471. Ministerial or clerical errors, such as updating contact information, do not require a reset of the 28-day waiting period. However, changes that materially affect the competitive bidding process, such **Edit Application Nickname** as changing the services or equipment being requested, do require restarting the 28-day waiting period. This function allows you to upo If you are requesting bids for additional equipment, services, or recipients of service not included on the original FCC Form 470, you may need to file a new FCC Form 470. Add an RFP Document This function allows you to up Please review the USAC.org for additional guidance. Does this new RFP constitute a substantial change to your FCC Form 470?* **Change Main Contact Person** If adding an RFP document, you This function allows you to upd Yes will be asked if a substantial O No **Edit Technical Contact** This function allows you to upd If you select yes, the 28-day waiting period will reset, and the Allowable Contract Date on your FCC Form change is being made, such as 470 will be updated accordingly. If the new Allowable Contract Date prevents you from certifying the FCC Cancel this FCC Form 470 Form 471 before the application window closes, you must request a waiver from the Commission after adding new service or quantities. This function allows you to can certifying the FCC Form 471. If so, your 28-day waiting period Uploading a new RFP document with substantial changes and not waiting the minimum 28 days may result in denial of funding. will restart. Upload the file, and Please add an RFP here @* then select the service to associate UPLOAD Drop file here the new RFP document with. → Associate RFP to Service Request(s) Category 1: Data Transmission and/or Internet Access Please select the service request(s) that apply to the RFP uploaded above. Number Installation and Initial Max Type Function Unit Associated RFP Quantity Entities Capacity Capacity Configuration? Data Transmission and/or Mobile Service For Use On School View RFP 15 15 Each Internet Access Buses Documents

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 2

Factor **Points** Company A Company B Company C Available Price of the ELIGIBLE goods and 50 services Equipment compatible with existing 20 infrastructure All equipment quoted is new with min of 3-year hardware replacement 10 warrant Cabling vendors is bonded/insured 10 Vendor is an authorized reseller 5 Vendor will provide discounted billing 5 Total 100 Based on the above bid matrix criteria when comparing the quotes for Insert Service Type, we have chosen

Insert Company Name as the service provider for our Internal Connections Category 2 request.

Name:		
Signature:		
200000		

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/