Fall FY2026 E-Rate Veteran's Workshop for Schools

Lorrie Germann, State E-Rate Coordinator

Fall FY2026 E-Rate Veteran's Workshop

Thanks for joining us, we'll get started at 9:00

For a copy of today's handout, go to
https://www.ohio-k12.help/e-rate-support/resource-library/

Lorrie Germann, State E-Rate Coordinator

Agenda for Today

- **Completing FY2024** – Slide 4

- **Where Are You At For FY2025** – Slide 10

- **Preparing For FY2026** – Slide 16

- **New Category 2 Budget Cycle**– Slide 29

- **Application Process Reminders** – Slide 38

Completing FY 2024

(July 1, 2024 – June 30, 2025)

BEAR Reimbursement Deadlines

- BEAR Form 472 – Form that must be submitted within 120 days of last date to receive service or equipment
- **For FY 2024 *recurring* services**
  - October 28, 2025 is the invoicing deadline
    - Last date to receive service was June 30, 2025
- **For FY 2024 *non-recurring* purchases**
  - September 30, 2025 was last date to receive/install equipment
 - Jan 28, 2026 is BEAR deadline

Requesting an Invoice Deadline Extension

- If you cannot make the BEAR deadline, OR if your BEAR was submitted but has not yet been paid, file for an Invoice Deadline Extension (IDER)
- IDERs <u>must</u> be requested by the invoice deadline (Oct. 28)
- Extension will be approved automatically for a single, 120-day extension
  - Cannot request a second extension in EPC
  - Approvals are shown on the screen and will also be emailed
- Invoice Deadline Extension Request Filing Guide at:
  - https://www.ohio-k12.help/E-Rate-support/resource-library/

BEAR – EPC Invoicing

- E-Rate BEAR functionality is in EPC
- Log into EPC, and click on the grid (waffle) symbol in the upper right corner of the Landing Page, which will take you to the new E-Rate BEAR Portal
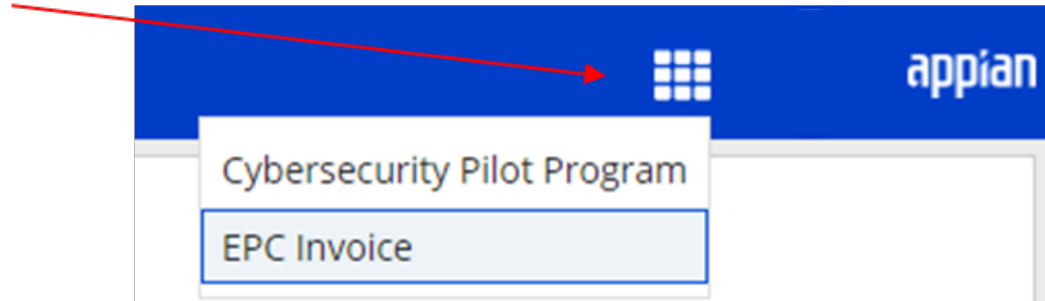
- For a BEAR Filing Guide, visit: https://www.ohio-k12.help/E-Rate-support/resource-library/
- Must have BEAR access under User Permissions to submit BEAR
  - Only EPC AA can grant this access
- When creating BEAR, you are not required to upload invoices. Wait for USAC to request them.

BEAR Portal Reminders

- Error checks (entering a higher pre-discount amount than what was approved
- Can enter multiple FRNs and multiple SPINs on the same BEAR
- Tabs for Submitted Forms, Pending Tasks, Pending Inquiries
- Real-time status reports by FRN Line Item in EPC:
  - Incomplete, Certified, Processed, Cancelled
- Ability to see the date BEAR was paid
- Better invoicing decision explanations
- Biggest pitfall is selecting the right funding year, so you see the correct FRNs

Invoice Disbursements Data Lookup Tool
- Shows details for all *disbursements* authorized since July 2016
  - Does <u>not</u> show pending invoices

https://opendata.usac.org/E-Rate/E-Rate-Invoice-Disbursements-Data-Lookup-Tool/t3vg-gfse

Invoice Review: Service Certification

Whether you filed a BEAR or your Service Provider discounted your bills and filed a SPI, USAC may conduct manual reviews that require additional documentation to demonstrate:

- The applicant paid their **non-discounted** costs.

- The invoiced equipment or services were **delivered** and/or **installed.**

- USAC validates the documents to ensure the requested amount is for eligible equipment and or services.

USAC reviewers may send questions to the applicant or service provider with a response due by the "response requirement date."

Applicant and service provider should be **timely in responding to outreach,** as failure to respond may result in the invoice being **denied**.

Only an applicant with full user rights can complete the certification and return it directly to USAC.

Service Certification – Example Form

Verbiage sent in the EPC outreach window regarding the request:

Please see the attached service certification that I am requesting in order to complete an invoice request from your service provider. Please ensure an authorized party review and signs, returning the signed document timely for review. if you have any questions. please contact me.
Thank you for you cooperation and continued support of the Universal Service Program.

Applicant Service Certification for E-Rate Invoices

#		
1	Invoice Number	«SLD_Invoice_No»
2	Invoice Line Number	«Line_ID»
3	Service Provider Name / Service Provider SPIN	«Service_Provider_Name» «SPIN»
4	Service Provider Invoice #	«SP_App_Invoice_No»
5	Undiscounted Invoice Amount	«Undiscounted_Amt»
6	Discounted Invoice Amount	«Discounted_Amt»
7	Applicant Name	
8	Applicant Authorized Representative / Contact Name & Title	
9	Applicant Authorized Representative / Contact Phone	
10	Billed Entity Number (BEN)	«BEN»
11	471 Number	«FORM_471»
12	FRN	«FRN»
13	Date Goods/Services Delivered	
14	Date Goods/Services Installed	
15	Date Applicant Portion Paid and Check No. or Date will be paid	

By signing below, you, the Applicant certify that:

A. I am authorized to represent the above-named Applicant.

B. The equipment/services described on the attached vendor invoice(s) have been delivered as indicated on row 13 above.

C. For FRNs which include installation, of the equipment/services described on the attached vendor invoice(s), provide the installation date. This is required only for non-recurring services (products that need installation) and paid for with E-Rate funds have as indicated on row 14 above

D. The equipment and services described on the attached Service Provider invoice meets the following criteria: (*Copy of detailed vendor invoice must be attached*)

- Equipment and services requested are approved on the FCC Form 471
- Unit cost and quantity per location do not exceed the amounts approved on the FCC Form 471
- All equipment has been delivered/ installed at ROS locations approved on the FCC Form 471 listed on the date provided above

Applicant Authorized Representative Name _____

Applicant Authorized Representative Signature_____

Date _____

E-Rate / Revised 10/16/2023

FY 2025

(July 1, 2025 – June 30, 2026)

Updates & Where Are You At In The Process

Off-Premises Wi-Fi Hotspots Are No Longer E-Rate Eligible for FY2025

- 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 does not apply to hotspots used for a library's bookmobiles or kiosks!**

Off-Premises Wi-Fi Hotspots Cont.

- Any existing funding requests in the E-Rate system will be denied automatically by USAC in the near future.

- The timing of and manner of those denials are TBD, but you should prepare for them now.

- You should re-read your contracts to see how the vendor addressed termination or alteration of the E-Rate program in their terms.

- Per the OPLIN Form 470 RFP, vendors were supposed to "Provide details for optional continuation or termination of the contract, in the event that the FCC Off-premises Wi-Fi Hotspot Program is either terminated or significantly altered before June 30, 2028."

- You should reach out to your vendor now if you need to change the quantities of devices or service lines, based on the elimination of E-Rate funding.

Status of Ohio FY2025 FCDLs

Applicant Type ⌄	Total Funding Requested
Consortium	$3,924,929.92
Library	$178,282.64
Library System	$4,753,332.26
School	$10,169,584.61
School District	$77,023,380.69
Grand Total	**$96,049,510.12**

Service Type	Funding Requested	No. of FRNs
Basic Maintenance of Internal Connections	$1,084,221.07	101
Data Transmission and/or Internet Access	$45,196,783.21	1,823
Internal Connections	$41,283,396.34	759
Managed Internal Broadband Services	$6,642,077.30	471
Wi-Fi Hotspots Services and Equipment	$1,331,136.78	54
Wireless School Bus Services and Equipment	$511,895.42	23
Grand Total	**$96,049,510.12**	**3,231**

Status of Ohio FY 2025 FCDLs

- Of the 3154 FRNs submitted (less Bus Wi-Fi/HS):

Status	No. of FRNs
Cancelled	59
Denied	10
Funded	2833
Pending	252
Grand Total	**3154**

FRN Status
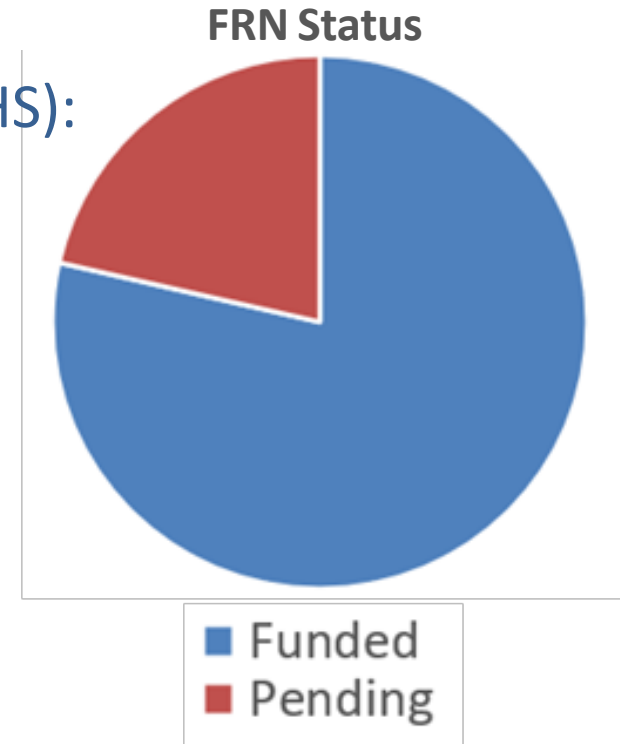
- Funded
- Pending

- $73.6 million committed thus far
  - Of the funded 2833 FRNs, **343 still need a Form 486 filed!**

- 252 FRNs still "pending" for 87 entities totaling $20 million

If you've had a post-commitment change request (SPIN changes, service substitutions, appeals) or a BEAR form pending for more than 60 days, use the "Contact Us" feature in EPC to request that it be escalated.

TIP!

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FY2025 FCDLs – Has Everything Been Funded

- If your Form 471 applications have not been funded
    - What is the current PIA status? Very important to verify that!
    - Let me know if no PIA contact has been received in the last 3 weeks
- If you've received the FCDL, were there unexpected denials?
    - Remember, you have 60 days from the date of the FCDL to file an appeal!

FY2025 Form 486s

- If you have been funded for FY 2025, file your Form 486 to "turn on funding" and certify CIPA compliance
    - For internal connections, file 486 now (don't wait)
- You must wait until you receive an FCDL to file the 486
- Deadline is 120 days after FCDL date or October 29, whichever is later
    - Normally Oct 29
- VERY easy form to file in EPC (no data entry)
    - Guide at: https://www.ohio-k12.help/E-Rate-support/resource-library/
    - Be careful when clicking on CIPA certifications

Preparing For FY 2026
(July 1, 2026 – June 30, 2027)

And, What's New

FY 2026 "Admin Window"

- Admin Window is 2-3 months _before_ the Form 471 window when schools and libraries update their school or library profiles in EPC portal
  - It opens on October 15. It usually closes two days before the Form 471 filing window opens in January (we don't have the dates yet!).This data is then ported over into the Form 471

- **Mainly used to update:**
  - **E-Rate Discounts**: Must update school profiles with current enrollment/NSLP data to calculate E-rate discounts for upcoming year
  - Confirm all entities, including NIFs, are in EPC portal
  - **Category 2 Budgets**: Update enrollment (schools) and square footage changes (libraries) – but ONLY if it will increase the Category 2 budget
    – Category 2 enrollment data can be _different_ from annual discount-rate enrollment data
      – Doesn't have to be updated each year
    – C2 enrollment data entered in separate location in EPC

>>> EPC Landing Page > School Name > Manage Organization > Scroll to the bottom of the page to see the Category 2 Enrollment field. Repeat for each school in the district that needs to be updated.

What Enrollment & NSLP Data To Use

- Most use the student/NSLP counts reported to ODE's **Office of Child Nutrition** for October, published in the annual MR-81 report.

- **For FY2026, we will use the October 2025 version (or you may use your most current data if you choose).**

- **DEW (f.k.a. ODE)** does not release the full MR-81 until early/mid-February (after the close of the Admin window), so ask your cafeteria director what was reported to ODE for October if you're not participating in CEP!

- **DEW sent me an updated MR-81 with all schools that are approved for CEP, including sites that applied in April 2025. The document also includes the "Base Year" information.**
  - **Note:** The minimum Direct Cert percentage required to qualify for CEP is 25% participation of students in households that qualify for programs like SNAP, TANF, RDPIR, or **Medicaid**, so more schools are participating **For a copy, go to https://www.ohio-k12.help/e-rate-support/resource-library/**

- You may also use counts from a Monthly Site Claim Form, CN-7 report, **survey**, etc., *but data obtained before filing the Form 471 application*.

- If your counts are different from the counts listed in the MR-81, you will be asked how you determined the information. **Be sure to document how you arrived at your total numbers.**

MR-81 Information – Which Numbers to Use

Non-CEP schools/districts use Enrollment and Free/Reduced counts:

Site IRN	Site Name	NSLP Provision	Enrollment	Total NSLP (Free/Reduced) Price Lunch Applications
00033936	North Adams Elementary School	Traditional	651	368
00033944	North Adams High School	Traditional	458	213
00070425	Ohio Valley Career & Technical Center	Traditional	338	190

CEP schools/districts use Enrollment, CEP Identified %, and update
Base Year, if needed:

Site Name	Base Year	Enrolled Students	CEP Eligible Student Count (Direct Certified)	CEP Identified % (Number to use in EPC if school participates in CEP. The 1.6 factor will be applied to calculate the NLSP %)
Chillicothe High School	2022	1,225	512	41.80%
Chillicothe Intermediate School	2022	678	396	58.41%
Chillicothe Primary School	2022	485	324	66.80%

Note: If two or more schools share a cafeteria, counts are combined and listed under the name of one of the schools. You will need to split the counts out to report in EPC. If using CEP, split the enrollment by building, but use the same CEP % of each.

Current Basic Maintenance (BMIC) Definition

- Basic Maintenance of Internal Connections is the **repair and upkeep of eligible internal connections**.

- The two types of Basic Maintenance Internal Connections are:

  - **In-Person Services**, which include on-site repairs (Time and Material Contracts)

  - **Remote Services**, which include Maintenance Support Services (such as basic technical support, configuration changes, bug fixes, patches, software upgrades, support service subscription licenses, technical support licenses)

- The equipment being maintained must be eligible in order for the maintenance to be eligible for E-Rate support.

  - If repair or replacement work is performed under a maintenance contract, USAC only reimburses for the **actual work performed**.

- Can only be for services/work performed during 12-month funding year (7/1/2026 – 6/30/2027)
  - Does <u>not</u> follow the 4/1/2026 – 9/30/2027 schedule

Draft FY2026 Eligible Services List (ESL)

The FCC has released the draft version of the FY2026 ESL and is seeking comments on proposed modifications, such as **how eligible software and other remote configuration services are categorized in the ESL.**

- This has been an issue when there is mixed Internal Connections (IC) & Basic Maintenance of Internal Connection (BMIC) functionality.

- Under current rules, items that include support, such as most equipment **license renewals**, which include both **right-to-use license** and **support**, allowing for remote-based services such as software upgrades and patches, bug fixes, security patches, and online and telephone-based technical assistance. **The item must be funded under BMIC.**

- For multi-year subscription renewals, which are treated as a multi-year contract, a pro-rata allocation of the cost is required. This means a funding request must be submitted for each funding year on the Form 471 for the annual amount, even when the full multi-year cost is paid to the service provider upfront. **Example: A 5-year renewal for a total cost of $10,000; you can only ask for $2,000 each year.**

Draft FY2026 ESL…Continued

Also, in previous funding years, USAC has recommended that you seek bids under both **IC and BMIC** when filing the Form 470 for license renewals**,** since you may not be sure where the licenses fit at that point. **This has caused tremendous confusion.**

- To alleviate this confusion, the FCC proposes to include software-based services, including bug fixes, security patches, software-based technical assistance, and configuration changes under **Internal Connections!!**

    - If approved, this would mean no more listing license renewals under both IC and BMIC on the Form 470, **but most importantly**, when paying for a multi-year subscription renewal upfront, you can receive reimbursement in year one!

- **Fixed maintenance contracts** (on-site configuration changes, and time and materials) will continue to be eligible for funding under BMIC, but only for the work that is actually performed under the contract.

Draft FY2026 ESL…Continued

The FCC also seeks comment on whether changes should be made regarding managed internal broadband services (**MIBS**). When originally adopted, the FCC noted that MIBS could "provide substantial benefits and cost savings to many schools and libraries, particularly small districts and libraries without a dedicated technology director available to deploy and manage advanced [local area networks] quickly and efficiently."

- They stated that applicants have been confused regarding the eligibility of these services and how MIBS differ from BMIC services, so they're asking the following questions:

  - **Are there any substantial benefits for funding MIBS?** If so, describe the benefits.
  - **Are there any cost savings and efficiencies for funding MIBS?** If so, describe the cost savings, providing information on the applicants who see the greatest benefits from MIBS.

Draft FY2026 ESL …Continued

- Should MIBS be more narrowly defined so there is no overlap with BMIC services? If so, comment on what items should be included or excluded from MIBS.
- How can we provide greater clarity in differentiating between MIBS and BMIC services in the ESL?
- Should these changes be made for the current funding year or for future funding years?

Initial comments regarding all proposed changes must be filed on or before October 15, 2025.

Reply comments (stating approval or disagreement with initial comments made) are due on or before October 30, 2025.

E-Rate Simplification – Covered Last Year, But Bears Repeating!

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

CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option (CABIO)

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

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

E-Rate Simplification...Continued

Repeal of C2 NIF Cost Allocation Requirement for Shared Equipment:

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

Full Eligibility for Data Network Cabling:

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

Off-Premises Wi-Fi Hotspots Will Not Be Eligible for FY2026

- Based on the decision, amending the FY2025 Eligible Services List to remove Wi-Fi services for school buses and hotspots as eligible services, the items will not be eligible moving forward into FY2026.

- The FY2026 version of the Form 470 has not been updated yet to remove the services. We are not sure when that will be completed.

New Category 2 Budgets

New 5-Year Category Two (C2) Budget Cycle

FY 2026 will be the first year of the FY 2026-2030 funding cycle.

- Unused funds from the FY 2021 – 2025 Category Two (C2) budget will not roll over to the FY 2026 – 2030 funding cycle.

- The E-Rate C2 Budget Tool FY2021+ provides data on the FY 2021-2025 C2 budget cycle.

  - The tool will be updated to show C2 budget forecast data for the FY 2026-2030 C2 budget cycle.

- Applicants will be required to validate their student counts or library square footage in the first year they apply for C2 support during the FY2026-2030 cycle.

- The C2 budget is calculated at the library system level based on the combined square footage.

- **To qualify for Category 2 funding, you must be CIPA-compliant**

FY2026-2030 C2 Budget Cycle Updates

FY2021-2025 C2 Budget Cycle	FY 2026-2030 C2 Budget Cycle
Libraries	**Libraries**
• $4.50/square foot	• **$5.43/square foot**
• $25,000 funding floor	• $30,175 funding floor
• Tribal libraries were eligible for up to $55,000	• This means a library **with less than 5,558 square feet** ($5.43/square foot * 5,557 square feet = $30,174.51) receives the funding floor of $30,175.
Schools	**Schools**
• $167/student	• $201.57/student
• $25,000 funding floor	• $30,175.00 funding floor
	• This means a school with fewer than 150 students ($201.57/student * 149 students = $30,033.93) receives the funding floor of $30,175.

Calculating Your Budget – OPTIONS

The Category 2 Order provides an exception for small school districts and library systems.

- Specifically, it allows school districts and library systems with 10 or fewer sites the option to calculate their budgets on a per-site basis by **adding together** the budgets of each eligible site within the district.

School	Student Count	Budget Calculation ($201.57/student	Budget Received (Use minimum budget if calculation is less)	
ABC High School	567	$114,290.19	$114,290.19	Based on enrollment count
ABC Middle School	532	$107,235.24	$107,235.24	
ABC Elementary School	212	$42,732.84	$42,732.84	
West Elementary School	125	$25,196.25	$30,175.00	Based on the budget floor
East Elementary School	131	$26,405.67	$30,175.00	
Totals	1567	$315,860.19	$324,608.27	

Establishing Your C2 Budget for this Cycle

- Update your entity profile in EPC during the Administrative Window

- **Forecast Budget**: Beginning in the FY2026- 2030 budget cycle, all entities will have a Forecast budget status based on the information in their EPC profile. This means that any updates you make to the entity profile will automatically reflect in an updated budget amount, without the need to request a replacement budget.

- **Preliminary Budget:** The entity has **certified** a Form 471 application within the FY2026-2030 C2 budget cycle. This means that the entity has certified the accuracy of the budget data currently in the entity profile.

- **Confirmed Budget:** Once Program Integrity Assurance (PIA) review of FY2026-2030 C2 Form 471 application is **complete**. The C2 budget in the entity profile is now **fixed**. It can only be changed via an Appeal for the current FY. Beginning in FY2027, the entity can request a replacement C2 budget if the student count has increased for the next year.

Category 2 Pre-Discount Budget Example

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

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

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

Category 2 Budget Tool

My Entities

Entity	Entity Number
School District 10997	10426
School 1 In District 10997	6913
School 2 In District 10997	6911

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

At the bottom of the page, you will see how your Cat 2 budget is calculated, one number for the district, or a number for each school. If you have 10 schools or less, and any have fewer than 150 students, use this option.

Category 2 Budget Tool

Click on "Category 2 Budget" and then "Get Category 2 Budget Information".

The new budget "forecast" is listed based on the total square footage reported. Clicking on "View Details" will show the funding breakdown by funding year.

Application Process Reminder/ Updating EPC

FY 2025 Application Timeline

E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - December
2) Update EPC Profiles - Admin Window	Oct - early January
3) Bid All New Services/Equipment – Form 470	Now - December
4) Bid Evaluation	January/February
5) Board Approval/Sign Contracts	January/February
6) Request E-Rate Funding – Form 471	Mid Jan. – March 25? (deadline TBA)
7) Application Review – PIA	March - August
8) Funding Commitment – FCDL	April - August
9) Turn-On Funding/CIPA Compliance – Form 486	FCDL receipt – October 29
10) Receive Services	July 1, 2025 – June 30, 2026
11) Pay Vendor	July 1, 2025 – June 30, 2026
12) Submit Invoice to USAC (one of two options) – Form 472 BEAR if paid vendor bill in full **or** – Vendor submits Form 474 SPI to USAC if you received discounted bills	October 28, 2026 (deadline)

Receiving Service/Equipment

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

FY2025 - Non-Recurring Services/Equipment Purchases - April 1, 2025 - Sept 30, 2026																	
			FY2025 - Recurring Service - July 1, 2025 - June 30, 2026														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2025	2025	2025	2025	2025	2025	2025	2025	2025	2026	2026	2026	2026	2026	2026	2026	2026	2026

When Must a Form 470 be Posted?

1. **Month-to-Month Services**
   - No contract exists – these are mostly cable modem-type services, or hotspots for a library's bookmobile
   - File annually unless using CABIO

2. **New Contracts (new service or current contract will expire 6/30/2025)**
   - File before signing any new contract
   - If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2026, you are **<u>not</u>** required to file a Form 470 for FY 2025

3. **Bandwidth Upgrades**
   - If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract

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

When to File the Form 470

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

For example:
- If Form 471 deadline is March 25, 2025; then…
- February 25, 2025 = 470 Deadline
  - <u>DO NOT wait this long!</u>
  - Gives you 1 day to evaluate bids, negotiate contracts, seek board approval, sign contracts, and then file the Form 471 by the 471 deadline

- **If you need to file a Form 470, plan on attending Form 470 training!!!!**

- You will also be able to find helpful Form 470 Guides at:
  https://www.ohio-k12.help/e-rate-support/resource-library/

  - Form 470 Disqualification Suggestions
  - C1 & C2 Form 470 Filing Guide – Schools/District
  - C1 & C2 Form 470 Filing Guide –Libraries
  - Sample C1 & C2 Bid Matrix/Acceptance Letter

Allowable Contract Date

Sample Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	**1** Date of RFP Upload Day 1	2 Day 2	3 Day 3	4 Day 4
5 Day 5	6 Day 6	7 Day 7	8 Day 8	9 Day 9	10 Day 10	11 Day 11
12 Day 12	13 Day 13	14 Day 14	15 Day 15	16 Day 16	17 Day 17	18 Day 18
19 Day 19	20 Day 20	21 Day 21	22 Day 22	23 Day 23	24 Day 24	25 Day 25
26 Day 26	27 Day 27	28 Day 28	Allowable Contract Date **29** Day 29	30	1	2

- **This is the earliest you can select a vendor.[1]**
- **You can wait up until you certify FCC Form 471 to select a vendor.[2]**

Remember

If the 470 narrative or RFP does not include a bid submission deadline

then applicants are **required** to accept all bids up until they conduct their bid evaluation.

[1] This may vary based on state and local procurement rules.
[2] You must select a vendor before the filing window closes.

School Detail Page

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

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

Modify An Organization

Name *

School 2 In District 10997

Organization Type

Applicant

Physical Address

Address Line 1 *

1 Main Street

Zip Code *

20850

Address Line 2

Zip Code Extension

Click the button below to get standard USPS address

City *

Rockville

County *

Montgomery County

State *

OH

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

VERIFY MY ADDRESS

Latitude / Longitude

User-entered Latitude ❓

Latitude ❓

User-entered Longitude ❓

Longitude ❓

LOOKUP URBAN/RURAL STATUS

Urban/Rural

User Entered Urban/Rural Status *
- 🔘 Rural
- ⚪ Urban

Urban/Rural Status ❓
- ⚪ Rural
- ⚪ Urban

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

View after clicking on "Manage Organization." Here, you can correct the building address if needed. You will also update enrollment and NSLP counts per school.

Just keep scrolling down; it's a really long screen!

School Information

School Sub-Type *
- ● Public School
- ○ Private School

Is this school part of a school district?

Yes

Check All That Apply Show Help

- ☐ Pre-K
- ☐ Head Start
- ☐ Adult Education
- ☐ Juvenile Justice
- ☐ Dormitory
- ☐ Charter School
- ☐ Tribal School

- ☐ New Construction School
- ☐ Swing Space
- ☐ Detention Center
- ☐ General-Use School
- ☐ ESA School
- ☐ BIE

Number of Full Time Students *

374

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

278

Community Eligibility Program (CEP)? *
- ○ Yes
- ● No

Alternative Discount Method *

None ▼

Indicate if an alternative discount mechanism was used to calculate the number of students eligible for NSLP

Does this organization have an endowment? *
- ○ Yes
- ● No

State School Code

State LEA Code

NCES Public State Code

NCES Public District Code

NCES Public Building Code

- Check boxes to further indicate the type of school if needed.
- Update/correct **Student** and **NSLP** counts.
- **If you are a school with only part-time students, count them as if they were full-time**
- In this example, the school is not participating in CEP, so "No' is indicated.

- If participating in CEP, do not enter the NSLP count, the portal will calculate that for you.

- Select "Yes" for CEP and enter the "CEP Percentage", which will replace the "Alternative Discount Method" field. The percentage can be found in the MR-81 or CN-7 report.
  - If you used CEP last year, that information will be shown. Update if you needed.

- **We must provide the CEP Base Year**. If this has changed, be sure to update.

47

Category Two (C2) Budget Information

We calculate your Category Two budget and your discount rate separately, and so we collect separate numbers for each. You are allowed to re-use your Category Two student count from year to year within a Category Two budget cycle, so this number needs to be updated less frequently than the student count for your discount rate.

Total Students for C2 Budget *

374

FCC Registration Number ❓

0123456789

CANCEL   SUBMIT

- The Cat 2 budget and the discount rate are calculated separately. Enter the new enrollment to start the new 5-year budget cycle. You can keep the Cat 2 count from year to year, but if your enrollment increases later in the cycle, you can update it.
- **If this is "New Construction" or "Swing Space", the count will be "zero"**
- Click on "Submit" and provide a nickname for the changes made (such as "ABC School FY2026 counts").

What's Next? Get Started Now!

- Review Category 1 contract
  - Need more bandwidth? Will your current contract allow for an increase? Check with the provider if you're not sure!
  - Contract expiring June 2026?
  - If needed, file FY2026 Form 470s by the end of December
- Determine what equipment will be needed in the upcoming year
  - File FY 2026 C2 Form 470s by end of December

Make and follow your FY 2026 E-Rate Plan!

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 lorrie.germann@education.ohio.gov
  - 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/