



Fall FY2027 E-Rate Beginner's Workshop for Schools

Lorrie Germann, State E-Rate Coordinator



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/>

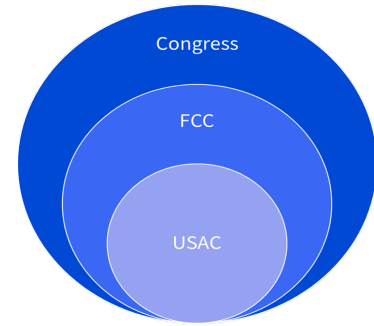


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Agenda for Today

- E-Rate Overview – Slide 4
- Eligible Services and Equipment – Slide 14
- Category 2 Budgets – Slide 28
- Application Process – Slide 35
- Program Updates (What's New For FY2027) – Slide 67
- E-Rate Productivity Center (EPC) – Slide 72

What is E-Rate?



- FY2026 Program Cap was \$5.2B
 - Funding does not come from the federal budget but is part of the Universal Service Fund (USF), which exists to ensure that all people in the United States have access to quality, affordable connectivity service.
- Provides 20-90% discounts on eligible services and equipment
- Program principles:
 - All equipment and services (**with a couple of exceptions**) must be competitively bid using the E-Rate portal for at least 28 days
 - Applicants **MUST** pay their non-discounted share (cannot be waived)
 - For example, if your discount is 80%, you must pay 20%
- FCC sets all rules and policies
 - USAC (Universal Service Administrative Co.), an independent, not-for-profit organization designated by the FCC to manage the program/ application process
 - We typically start applying 6-12 months before the funding year begins
 - The program is highly deadline-driven

Funding Year

A Funding Year (FY) runs from July 1st to June 30th

- Our current funding year, FY2026, started on July 1, 2026, and ends on June 30, 2027.
- We are preparing to file for FY2027, which starts on July 1, 2027, and ends on June 30, 2028.

Delivery and installation of services

- **Recurring services** (e.g., monthly internet access) must be delivered during the funding year.
- **Non-recurring services** (e.g., equipment installations) can generally be installed **as early as April 1 (90 days) before the July 1st start of the funding year** through September 30 following the close of the funding year.
 - The September 30 deadline can sometimes be extended, either automatically or by request.

Who Is Eligible?

- Public libraries eligible for LSTA funding
 - Includes bookmobiles



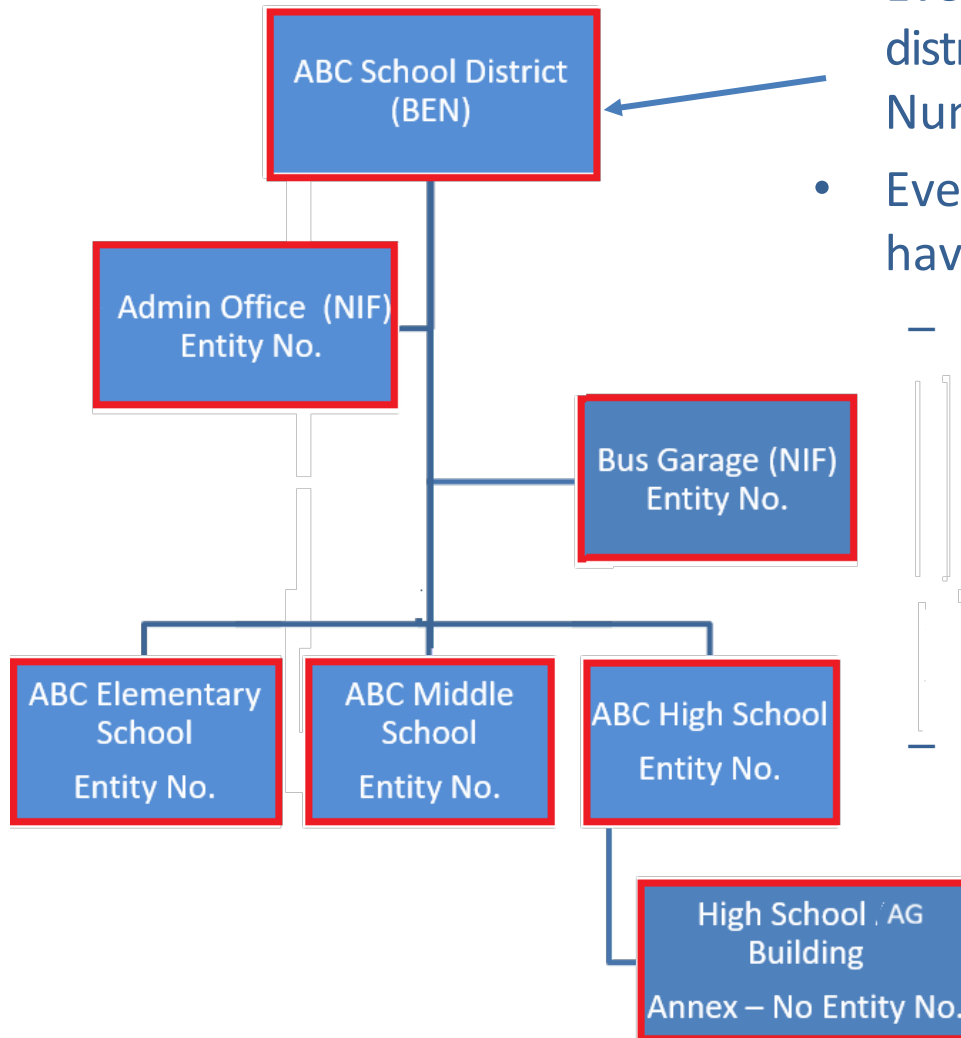
- Public and non-public, non-profit K-12 schools
 - "Special Needs" Pre-K is eligible (ages 3+) in Ohio



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



Who Is Eligible?



- Every “parent” organization (i.e., school district, library system) has a Billed Entity Number (BEN)
- Every “child” (school or NIF) building must have an Entity Number
 - If a school has a secondary site (separate gym, voc/ag, etc.) that will receive E-Rate services, it is designated as an “Annex”. No separate entity number is needed. **To determine if it’s a “school” or “annex,” ask if the building has its own IRN!! If there is no assigned IRN, it’s an annex.**
 - Contact USAC to obtain Entity Numbers for new buildings (school or NIF)

EPC – E-Rate Productivity Center

- The E-Rate application management portal
- All E-Rate forms, letters, and interactions are located in EPC
- This is also where...
 - **We update student enrollment/NLSP counts**
 - **Create users/assign rights**
- Every “Billed Entity” has a BEN portal account
- Every BEN Account has “Users”
 - Each BEN can have only **one** Account Administrator (AA)
 - Only the **AA** can create/edit user permissions
 - You may have or add additional users and assign specific rights
- **Admin Window** – the period of time when we can update portal information such as **student enrollment/NLSP counts**
 - The window will open on Oct. 21, 2026 and will close in early to mid-January

School Discount Calculations

- **Discount level for schools based on 2 factors:**
 1. % of students – **district wide** - who are eligible for the National School Lunch Program (**NSLP**)
 - Doesn't matter if school serves lunch or participates in NSLP
 - CEP schools' 1.6 multiplier calculated automatically
 - Alternatives to using NSLP data available (such as surveys)
 2. Whether a majority of school buildings are considered **urban or rural**
 - Designations already in EPC
 - This is based on 2020 US Census rural/urban designations
- Using this data, the 'Discount Matrix' is then used to determine your district-wide discount percentage

CEP = Community Eligibility Program

Discount Matrix

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

% NSLP = 43% and a majority of schools are Urban

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 FY2027, we will use the **October 2026** version (or you may use your most current data if you choose).
- The MR-81 is typically released in early/mid-February. We update our counts in the E-Rate portal from mid-October to early January, so ask your cafeteria director what was reported to ODE for October!
- Over the summer, ODE typically sends me an updated MR-81 listing the schools approved for CEP during the previous April. The document also includes the “Base Year” information, which is the approval year starting the 4-year cycle.
 - 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.
- You may 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 %)
A+ Arts Academy Maybury Campus	2024	169	91	53.85
A+ Arts Academy Middle	2024	303	204	67.33
A+ Arts Academy Napoleon Campus	2024	122	58	47.54

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 CEP, break out the enrollment, but use the same CEP % for each school.



E-Rate Eligible Services

Categories of Service

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

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



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

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





What's Eligible Under Category 1

C1: Data Transmission Services

Most Common:

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

Other Eligible Fiber:

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

* Additional bidding requirements apply

Also Eligible :

- Commercially available Internet access
- Satellite Services
- Stand-Alone Internet (no transport cost if you own the fiber to your buildings, or a different vendor provides the circuits)
- Wireless data plans * (**typically used for bookmobiles or kiosks**), where plans are the most cost-effective option

Not Eligible:

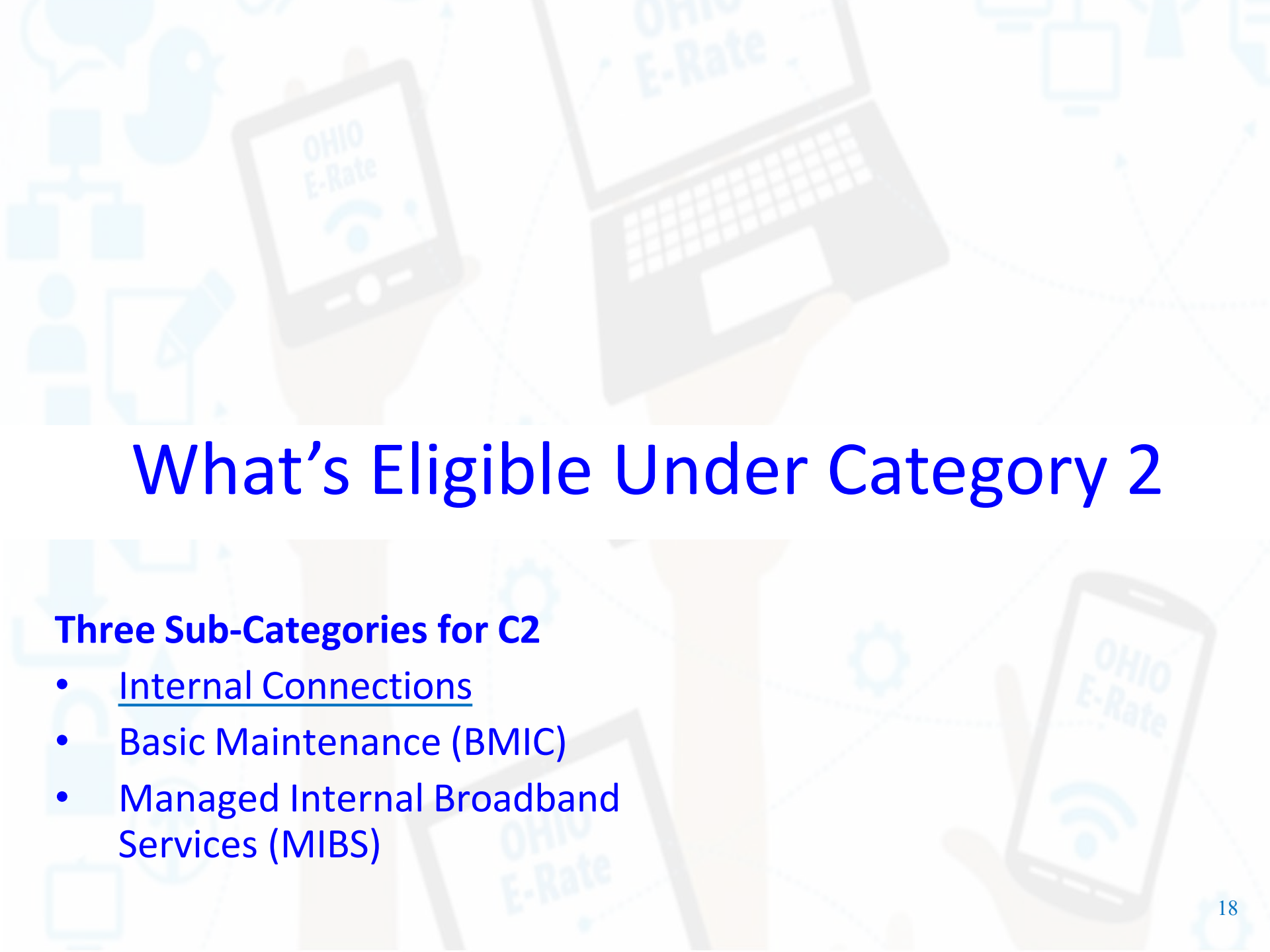
- Voice services
- Duplicative (redundant) services
- Filtering
- Off-Campus Internet service

CABIO Internet Bidding Exemption

Commercially Available Bundled Internet Option (CABIO)

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

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



What's Eligible Under Category 2

Three Sub-Categories for C2

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

Internal Connections

- Wireless Access Points/Controllers
- Network Routers & Switches
- In-Building Structured Cabling
- Caching Servers
 - Only eligible servers
- Firewall Appliances
- Racks and UPSs
 - That support eligible equipment only
- Right-to-Use licenses to support eligible equipment
 - Includes license renewal subscription
- **Remote support** (bug fixes, patches, software-based/online tech assistance, configuration changes)
- Cloud-based functionality of eligible equipment
- Installation and configuration
 - If wanted, be sure to specify this in your 470/RFP
- Taxes and fees
- Basic training on use of equipment
- **Not eligible:**
 - **Cybersecurity!!!!!!**
 - Storage Devices
 - Voice/Video Components
 - End User Devices
 - Security cameras
 - Advanced firewall functions, like anti-spam, anti-virus, etc.

Library Small C2 Bidding Exemption

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

Category 2 Cost Allocations

Depending on the functionality of some equipment or software, the product may not be fully eligible for E-Rate funding, requiring a percentage of the cost to be deducted.

- Below are links to manufacturers' websites or documents they have provided, publishing their cost allocations.

- [Cisco/Meraki](#)

- [Fortinet](#)

- [HP Aruba](#)

- [Juniper Networks](#)

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

- [Sophos](#)

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



SKU	Description	Eligible	Notes
C9410R-96U-BNDL-E	Catalyst 9400 Series 10 slot,Sup, 2xC9400-LC-48U, DNA-E LIC	100%	
C9410R-96U-BNDL-A	Catalyst 9400 Series 10 slot,Sup, 2xC9400-LC-48U, DNA-A LIC	Cost Allocate (79%)	

Internal Connections Purchase Timeline

- Equipment can be purchased as early as April 1, prior to the funding year start
 - For example, applicants can purchase equipment on April 1, 2027, for FY 2027, even though the funding year doesn't begin until July 1, 2027
 - However...** vendors/applicants cannot be reimbursed by USAC until July 1
 - Applicants who purchase equipment prior to receiving a funding commitment letter are risking paying full price
- Equipment can be purchased as late as September 30, following the end of the funding year
- Allows applicants two full summers to install equipment

FY2027 - Non-Recurring Services/Equipment Purchases - April 1, 2027 - Sept 30, 2028																	
			FY2027 - Recurring Service - July 1, 2027 - June 30, 2028														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2027	2027	2027	2027	2027	2027	2027	2027	2027	2028	2028	2028	2028	2028	2028	2028	2028	2028

Basic Maintenance (BMIC) Definition

- Basic Maintenance of Internal Connections is the **on-site repair and upkeep of eligible internal connections (time & materials)**.
- 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**.
 - You must keep a maintenance log documenting work performed.
- Can only be for services/work performed during the 12-month funding year (7/1/2027 – 6/30/2028)
 - Does not follow the 4/1/2027 – 9/30/2028 schedule

BMIC Services Exclusions

- Actual equipment being maintained (e.g., cabling, access points, switches)
 - These are eligible under **Internal Connections**.
- Unbundled warranties (Not Eligible for E-Rate Funding)
- Network management services, including 24-hour network monitoring (Eligible under **Managed Internal Broadband Services (MIBS)**)
- The management, operation, and monitoring of eligible broadband internal connections (Eligible under **Managed Internal Broadband Services (MIBS)**)
- Maintenance on ineligible equipment (Not Eligible for E-Rate Funding)

Managed Internal Broadband Services

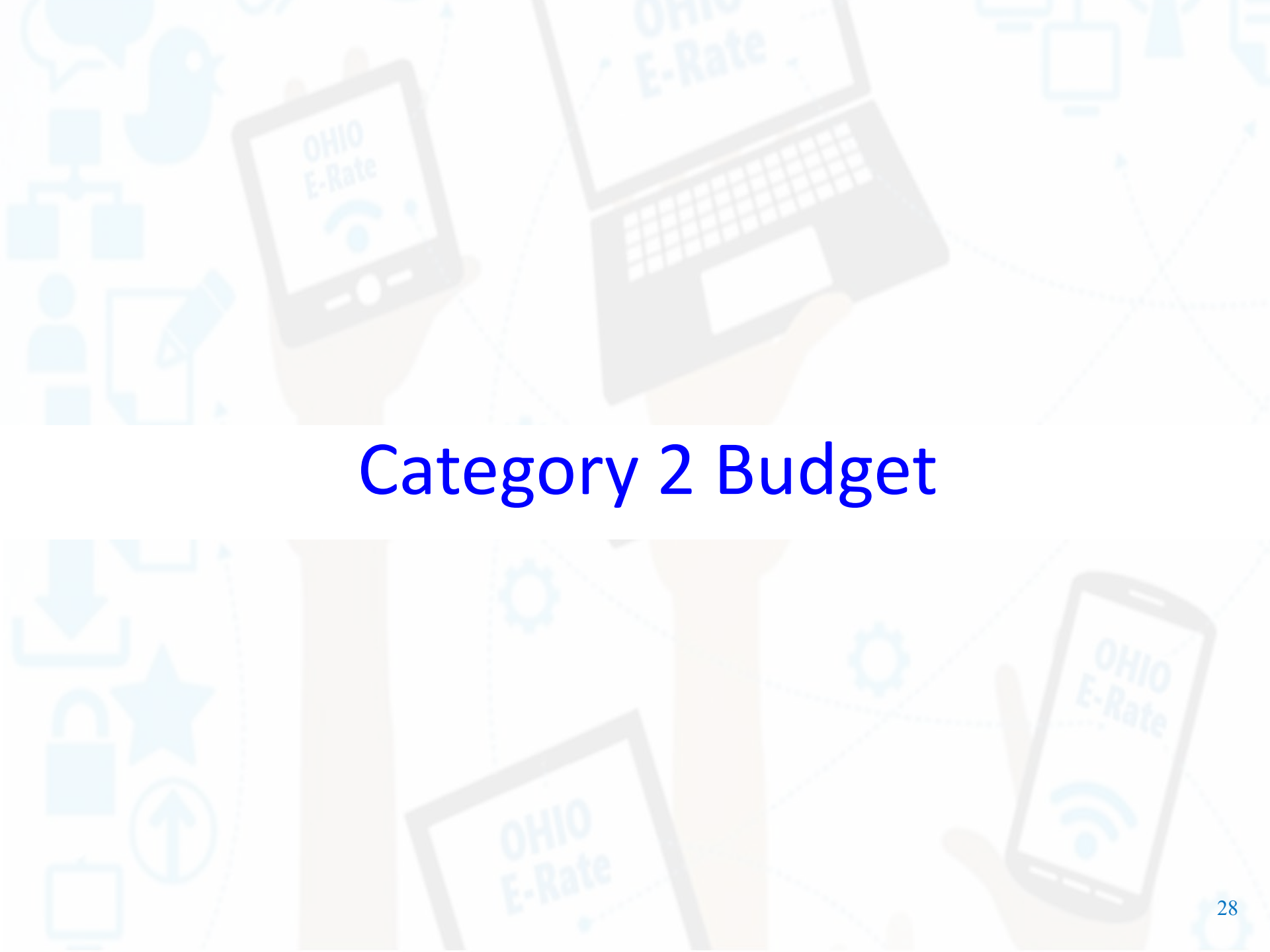
- Managed Internal Broadband Services (MIBS)
- Covers the operation, management, or monitoring of a LAN
- 2 Options:
 - Paying an outside vendor to own/manage the equipment
 - Paying an outside vendor to manage school-owned equipment
- Subject to the C2 budget caps
- Traditionally used by small schools/districts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

NIFs Not Eligible for C2 Funding

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

Equipment Transfer/Disposal Rules

- **Receiving equipment:** Be sure to label each piece and record it in your asset inventory
 - *Make/model/serial number/building/room/FRN/date installed*
- **Transfers:** E-Rate funded equipment may be transferred between eligible schools or libraries (not NIFs) within the BEN
 - If equipment is transferred between buildings within 5 years from the date of purchase, applicants must record the reason and date of transfer and update the asset inventory
 - No notice to USAC is required
 - Asset inventory must be retained for 10 years from the date of purchase
- **Disposal:** Equipment may be disposed of, sold, moved to a NIF, etc. after 5 years from the date of installation
 - No notice to USAC is required, but asset inventory must be updated



Category 2 Budget

5-Year Category Two (C2) Budget Cycle

FY 2026 started the first year of the 5-year FY 2026-2030 funding cycle.

- The E-Rate C2 Budget Tool FY2021+ provides data on the FY 2026-2030 C2 budget cycle.
- Applicants are 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 school district and library system level based on the combined enrollment (schools)/square footage (libraries).
- **To qualify for Category 2 funding, you must be CIPA-compliant**
- Update your entity profile in EPC during the Administrative Window
- **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.

FY2026-2030 C2 Budget Cycle

FY 2026-2030 C2 Budget Cycle

Libraries

- \$5.43/square foot
- \$30,175 funding floor
 - This means a library **with less than 5,558 square feet** ($\$5.43/\text{square foot} * 5,557 \text{ square feet} = \$30,174.51$) receives the funding floor of \$30,175.

Schools

- \$201.57/student
- \$30,175.00 funding floor
 - This means a school with fewer than 150 students ($\$201.57/\text{student} * 149 \text{ students} = \$30,033.93$) 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

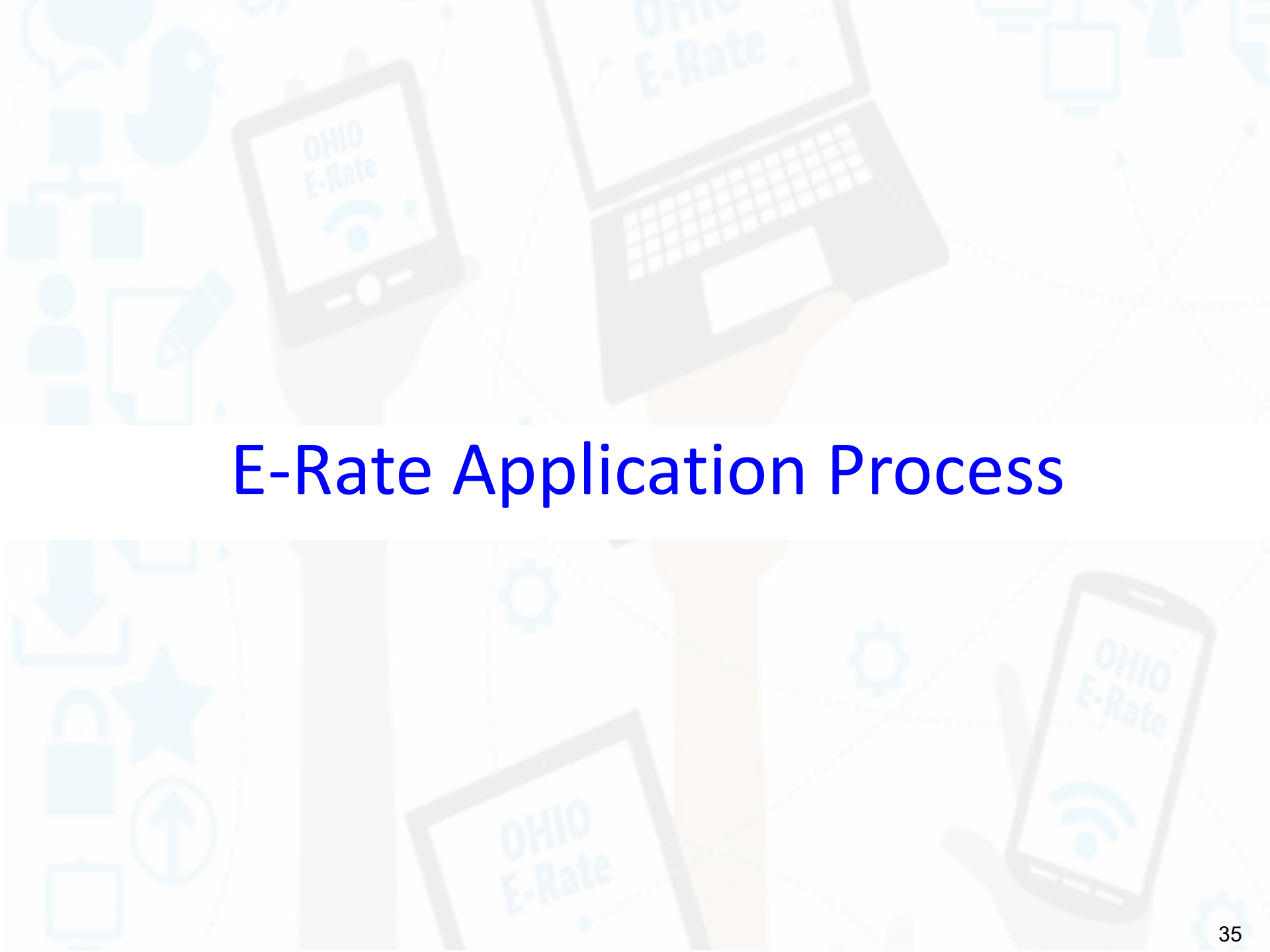
* The C2 Budget Cap is the **pre-discount price**. E-Rate discounts will then apply **on top of** the budget cap. In this example, the applicant would still owe its 40% non-discounted share

Data Used for Category 2 Budgets

- Enrollment data is entered in a separate location in EPC (different from discount calculations)
- Why? Enrollments are set in the first year you apply for C2 during that Category 2 Budget Cycle
- Not required to update annually
- CAN update if it will increase your C2 budget
 - Must then ask for C2 Budget Recalculation from USAC
- If using CEP enrollment for discount rate, compare to actual/current enrollment. Use the higher of the two to calculate C2 budget.

Where to update C2 enrollment data?

>>> EPC Landing Page > District Name > Manage Organization >
Scroll to bottom of page

The background features a light blue and white pattern of various icons including a Twitter bird, a smartphone, a laptop, a tablet, a Wi-Fi symbol, a gear, a star, and a document. Dotted lines connect these icons, suggesting a network or process flow. In the foreground, there are illustrations of hands holding a smartphone, a laptop, and a tablet, all displaying the text "OHIO E-Rate" and a Wi-Fi symbol.

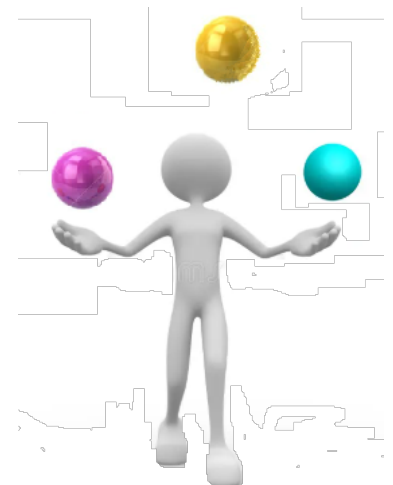
E-Rate Application Process

Application Process Overview – FY2027

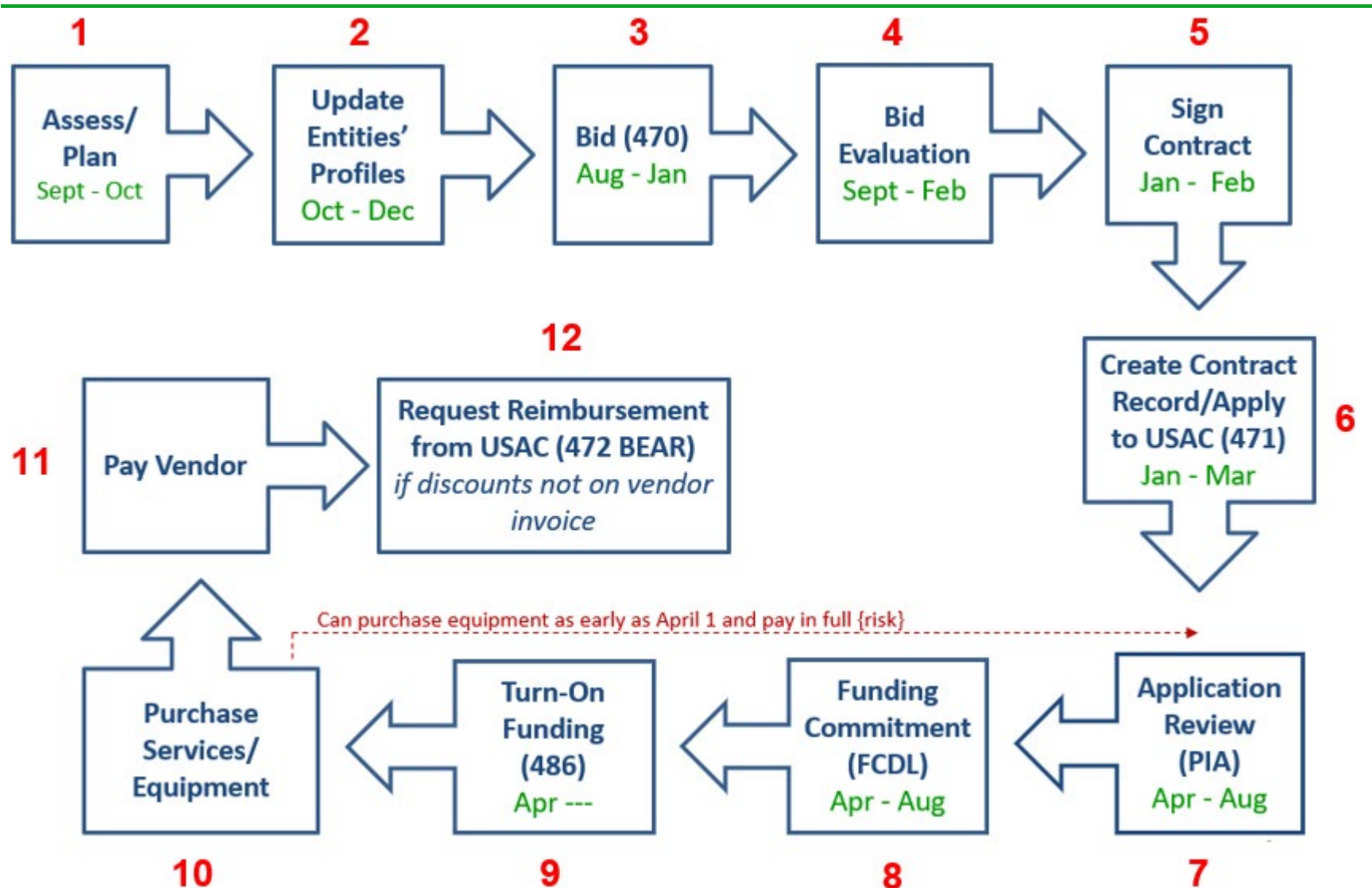
E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - December
2) Update EPC Profiles - Admin Window	Oct 21, 2026- early January
3) Bid All New Services/Equipment – Form 470	Now - January
4) Bid Evaluation	January/February
5) Board Approval/Sign Contracts	January/February
6) Request E-Rate Funding – Form 471	Mid-Jan. – Late March (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, 2027 – June 30, 2028
11) Pay Vendor	July 1, 2027 – June 30, 2028
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, 2028 (deadline)

FY 2027 Application Cycle

- Funding years are named for the year in which they begin
 - FY 2026 = July 1, 2026 – June 30, 2027
 - FY 2027 = July 1, 2027 – June 30, 2028
- The application process begins 6-9 months ahead of start of next funding year
- May be dealing with 3 funding years at one time (**Don't panic!!!! It's doable**):
 - **FY2025 BEAR - Oct 28, 2026, deadline for recurring service**
 - **FY2026 Form 486 if FCDL received before July 1st for recurring service**
 - **FY2027 Form 470 if new service/equipment is needed**



Steps 1 - 12



Step 1: Assess Need & Plan



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

Step 2... Update Entities' Profiles

- **Update Entities' Profiles during the Administrative Window each fall (Oct. 21, 2026 – early/mid January)**
 - Approx. 3-month period when schools must update enrollment/NSLP data for each school
 - And update Category 2 Enrollment if it has increased
 - Data cannot be changed once the Admin Window closes (but you can provide updated info on the Form 471)
- Confirm all entities, including NIFs, are in EPC portal
 - Contact CSB at 888-203-8100 to make entity adjustments
- Libraries do not enter enrollment/NSLP data
 - EPC links libraries with the school district in which the library (or main library in a system) is located
 - Libraries should update square footage/address changes, if any



Step 3: Posting the Form 470

Form 470 Competitive Bidding Form

- Notifies vendors of services and equipment for which you are seeking proposals
 - All equipment/services for which you will seek funding on the Form 471 must have been posted on a Form 470
- Vendors are invited to submit bids/price quotes for 28 days from the date of certifying your Form 470
 - List **bid due date** in the narrative text box, along with **any disqualifying factors**
- You are NOT obligated to purchase any service/equipment listed on Form 470
- Category 1 and Category 2 can be filed on the same 470



When Must a Form 470 be Posted?

1. Month-to-Month Services

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

2. New Contracts (new service or current contract will expire 6/30/2027)

- 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, 2028, you are **not** required to file a Form 470 for FY 2027

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



When to File the Form 470

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

For example:

- If Form 471 deadline is March 25, 2027; then...
- February 25, 2027 = 470 Deadline
 - DO NOT wait this long!
 - Gives you 1 day to evaluate bids, negotiate contracts, seek board approval, sign contracts, and then file the Form 471 by the 471 deadline
- **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/erate/e-rate-resources/>
 - Form 470 Disqualification Suggestions
 - C1 & C2 Form 470 Filing Guide – Schools/District
 - C1 & C2 Form 470 Filing Guide –Libraries
 - Sample C1 & C2 Bid Matrix/Acceptance Letter

28-Day Waiting Period Review and Reminders

Frequently Asked Questions (FAQs) on the 28-day waiting period:

- **When does the waiting period start?** *The calendar day you certify your FCC Form 470, the day you certify, is day one. For example, if you certify on 1/1/2027, the waiting period starts on 1/1/2027, and your Allowable Contract Date is 1/29/2027. If you add a Request for Proposals after certifying the FCC Form 470, you may be required to restart the 28- day waiting period.*
- **Do weekends count as part of the 28 days?** *Yes, the 28-day period is based on calendar days.*
- **When can you select a vendor?** *After the 28-day waiting period (unless your FCC Form 470 lists a later bid deadline.)*
- **When's the last day you can select a vendor?** *You must select the most cost-effective service offering before you submit the FCC Form 471.*
- **When can you stop receiving bids?** *You may set a bid deadline and include it to your narrative or RFP. This deadline must be at least 28 days after verifying your FCC Form 470 or longer. If you **do not add a deadline to your narrative or RFP**, you **must accept bids up until you evaluate bids and make a vendor selection.***

These deadlines should be memorialized in your records.

Allowable Contract Date (ACD)

CALENDAR

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	Certified FCC Form 470 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 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 evaluation.

Requests for Proposals (RFPs)

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

During the Bidding Period...

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

Step 4: Evaluating Bids

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

Disqualifying a Bid

- In order to disqualify a bid, the bid disqualification reason must have been stated in the Form 470 or in the RFP. **Vendors must know what will get them disqualified!!**
- **The reasons must be yes/no (either they complied or they did not)**
- *Examples:*
 - Vendor must submit a proposal by the deadline stated in the 470/RFP
 - Vendor must bid on all services requested in the 470/RFP
 - Vendor must be authorized to do business in OH
 - Equipment must be compatible with the school's existing XXX equipment
 - Be sure to list the existing equipment in the school or library
 - Equipment cannot be refurbished or "gray market"
 - Vendor must be willing to provide discounted bills
 - Vendor must attend pre-bid walk-through
- When disqualifying a bid, make a note of the exact reason for disqualifying and show where it was stated in the 470 or RFP



Received No Bids?

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

Bid Evaluation Sample

Factor	Points Available	Vendor 1	Vendor 2	Vendor 3
Price of the ELIGIBLE products and services	50	20	50	40
Prior experience w/vendor	20	20	0	20
Pricing includes basic firewall service	15	0	0	15
Flexible Invoicing: FCC Forms 472 or 474	10	0	10	10
Local or in-state vendor	5	5	0	5
TOTAL	100	45	60	90

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

Name: _____

Signature: _____

Date: _____

- Evaluate your bids using a matrix with your bid factors listed and assigned points.
- Price must have the highest number of points
- If a vendor was disqualified, they would not be included in the bid matrix table but give an explanation as to why they were disqualified.
- Based on this example, Vendor 3 wins because they received the most points.

For a copy of a Category 1 and Category 2 bid matrix and acceptance letter, go to <https://www.ohio-k12.help/erate/e-rate-resources/>

Step 5: Signing Contracts

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



Know Your Role

Applicants	Service Providers
• Determine services needed, file FCC Form 470 and RFP. • Run competitive bidding process. • Select winning bidder, with price of eligible product and services as primary factor. • Respond to PIA • File other applicant forms (FCC Forms 471, 486, 472, 500, etc.) • Document their compliance with FCC rules on an ongoing basis.	• Respond to FCC Form 470 and RFPs. • May assist with responding to PIA on technical services questions (but not competitive bidding). • File other service provider forms (FCC Forms 473, 474, etc. • Document their compliance with FCC rules on an ongoing basis.

Applicants **cannot** have a relationship with service providers that would unfairly influence the outcome of the competition.

Step 6: Contract Records/ Filing the Form 471

Purpose of the Form 471

- Must be filed **annually** by the entity that pays the bills (the Billed Entity), even if you're in the middle of a multi-year contract!!
- Formally requests E-Rate funding commitments from USAC
- Asks detailed questions about services or equipment
- Indicates which entities are receiving service
- Shows discount calculations (from EPC)
- Links to a Contract Record(s) to show which Form 470 was used to bid services, contract signing dates, contract amounts, etc.

Funding Requests

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

When and How Many to File

- 471 Application Window: early January – mid/late March

Do **NOT** miss this deadline!

- Must be filed in EPC
- Category 1 and Category 2 **must** be filed on separate applications
 - Multiple applications are ok within the same category of funding

Please plan on attending the Form 471 workshop in January/ February



Step 7: PIA Application Review

Program Integrity Assurance (PIA) Review

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



Step 8: USAC Issues Funding Decisions

FCDL = Funding Commitment Decision Letter



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

Step 9: Filing the Form 486



Form 486 Receipt of Services Form

- Informs USAC that services have (or will) **start**, and
 - Informs USAC that your school or library is **CIPA** compliant
-
- Can only be filed after the FCDL has been issued
 - No applicant or vendor reimbursement forms can be paid until the Form 486 has been submitted and approved
 - Form 486 is **very** simple! Almost all data fields pre-populated
-
- Deadline:** 120 days after FCDL date or October 29, whichever is later
- Can be filed immediately after FCDL received, **even before July 1**
 - USAC will deduct 1-month's funding for each month the form is late

CIPA Requirements

Any school or library receiving either Internal connections or Internet access must...

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

Step 10: 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 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)

FY2027 - Non-Recurring Services/Equipment Purchases - April 1, 2027 - Sept 30, 2028																	
			FY2027 - Recurring Service - July 1, 2027 - June 30, 2028														
Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept
2027	2027	2027	2027	2027	2027	2027	2027	2027	2028	2028	2028	2028	2028	2028	2028	2028	2028

Document Retention

- You must keep all documentation for 10 years from the last date of service.
 - For multi-year contracts, this means 10 years from the contract expiration date.
- For example, for recurring internet access service for FY2027, both the applicant and the service provider must retain all records until at least June 30, 2038.
- Retain receipt and delivery records relating to pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to your applications.



Step 11: Paying for Equipment/Services

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



Step 12: Requesting Reimbursement

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

Deadline:

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



Reimbursement Method - BEAR

- USAC reviews/approves BEAR and sends payment to the applicant's bank account via EFT
- School/Library must have an approved Form 498 in EPC to be reimbursed with the SAM.gov UEI number added
 - Form 498 is submitted once (update, if needed)
 - **UEI number must be renewed annually at SAM.gov!**
- To determine if you have an approved Form 498:
 - Log into EPC > Records > Form 498s > Click on 498 if one is showing
 - If no 498 is showing, then there isn't one on file with USAC



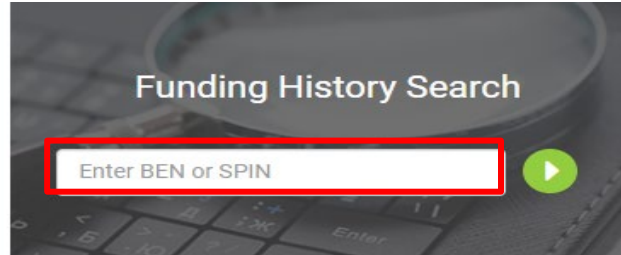
Discounted Bills Method - SPI

- Vendor applies E-Rate discounts to invoice(s)
- Vendor submits Form 474 SPI to USAC to seek reimbursement
- Applicants' responsibilities?
 - Notify the vendor you want discounted bills
 - Review invoices to ensure discounts are properly applied
 - File timely Form 486 so the vendor can invoice USAC
 - Make sure at least one user in EPC has full rights to the BEAR Form, even if you will not file the BEAR.



Quick Way to Your Funding Information

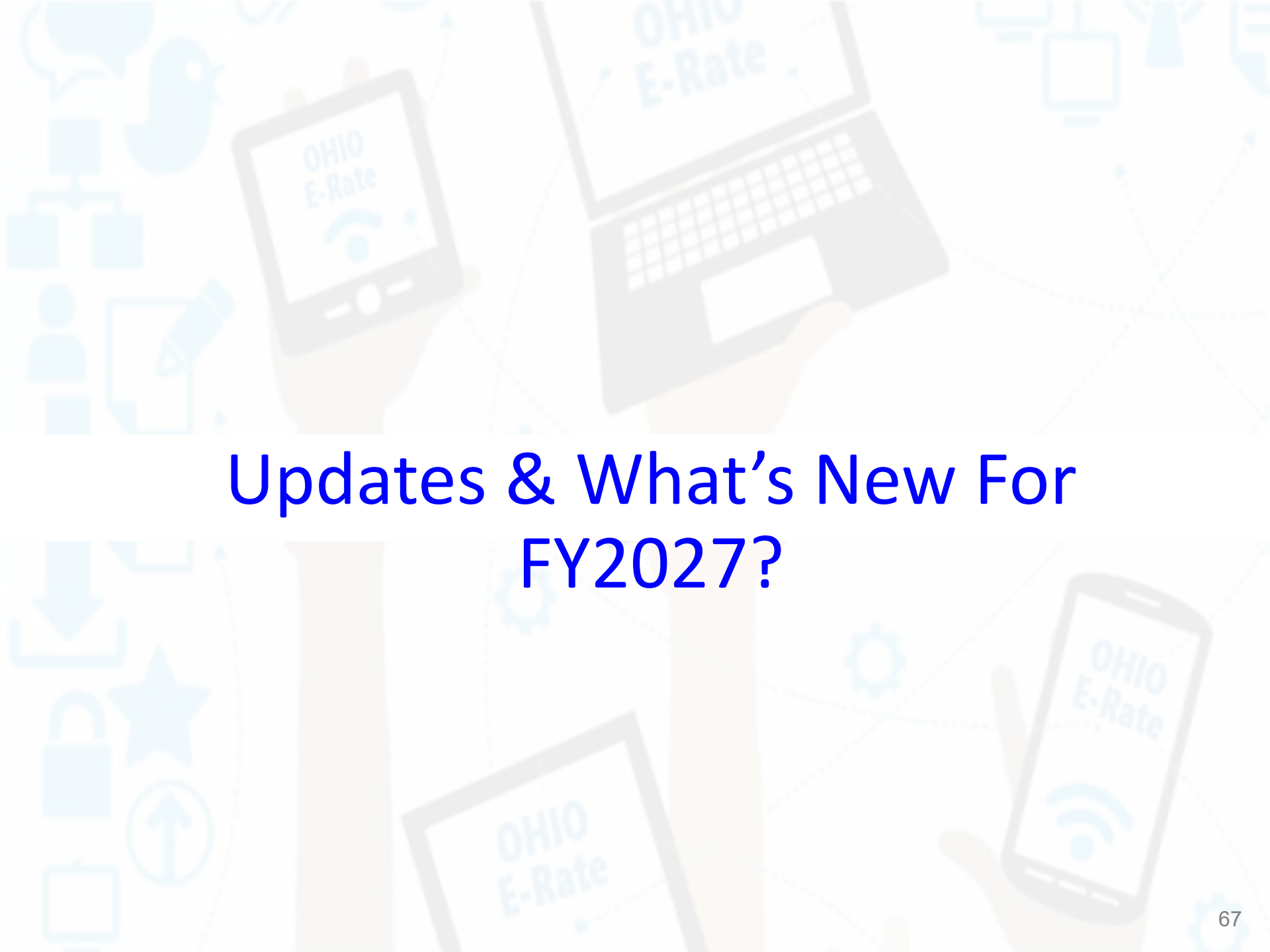
Go to: www.E-Ratecentral.com



E-Rate Utilization Summary Chart										
FY: 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 All										
FY	Requested FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2	Total Committed	Total Disbursed	Remaining Balance	
2025	5	4	4	\$199,064.60	\$39,840.34	\$79,034.26	\$118,874.60	\$79,034.26	\$39,840.34	
2024	5	5	5	\$40,938.39	\$38,585.16	\$1,373.18	\$39,958.34	\$36,365.83	\$3,592.51	
2023	4	4	4	\$38,649.75	\$38,649.75	\$0.00	\$38,649.75	\$38,649.75	\$0.00	

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

471	FRN	SPIN	Service Provider	Service*	Original Request	Current Commitment
251016864	2599019925		471 Information			
251016864	2599019927		471#:	251016864		
251024256	2599031855		SPIN:	143001654	The Chillicothe Telephone Company	
			Service Type:	Data Transmission and/or Internet Access		
			Status:	Funded	Wave: 1	FCDL Date: 4/26/2025
			Status Memo:	• MR1: Approved as submitted.		
			Service Start Date (471):	7/1/2025	Service Start Date (486):	7/1/2025
			Current Commitment:	\$25,423.20	Payment Mode:	NOT SET
			Disbursed Amount:*		Undisbursed:	25423.20
			Last Date of Service:		Last Date to Invoice:	10/28/2026

The background of the slide features a light blue and white pattern. It includes several instances of the 'OHIO E-Rate' logo, which consists of the text 'OHIO E-Rate' above a stylized blue Wi-Fi symbol. These logos are displayed on a smartphone, a laptop, and a tablet, all held by hands. Scattered throughout the background are various light blue icons: a speech bubble, a Twitter bird, a person icon, a document with a pencil, a star, a gear, a lightbulb, a computer monitor, and a network diagram with nodes and connecting lines.

Updates & What's New For FY2027?

Invoicing Changes

Applicants and service providers can now:

- Request a single 120-day extension of the original invoice filing deadline if the request is made **within 15 days of the original invoice filing deadline**.
 - Recurring service BEAR deadline of 10/28/2026 + 15 days = 11/12/2026
 - Non-Recurring service BEAR deadline of 01/28/2027 + 15 days = 2/12/2027
 - Instructions to request an extension can be found [here](#).
- Have a one-time, 60-day grace period to resubmit corrected versions of invoices that were timely filed before the invoice filing deadline but rejected by USAC after the invoicing deadline.
 - **The 60-day period to resubmit a corrected invoice starts the day after you get a USAC decision denying or reducing your payment.**

Competitive Bidding Portal

Beginning in funding year **(FY) 2028**, USAC will manage a Competitive Bidding Portal where:

- Applicants will upload bid evaluations and vendor selection documentation, including contract(s), after selecting service providers.
- The portal will be used for competitive bidding communications, with exceptions based on local/state law requirements.
- The portal will serve as a document repository for applicants and service providers, which will reduce recordkeeping burdens.
- Stakeholders will have the opportunity to provide feedback during the testing phase.
- USAC will update users via our News Brief as we are informed of changes.

Will MIBS Continue to Be Eligible?

- We are currently waiting for the FY2027 Eligible Service List (ESL) to be approved.
- The FCC is considering whether MIBS should continue to be eligible.
- The decision will be stated in the released ESL.
- **MORE INFORMATION TO COME!!**

The Future of E-Rate

- The FCC released two E-Rate Notices of Proposed Rulemaking (NPRMs) that could significantly impact the program and the administration of the Universal Service Fund (USF)
- Initial comments were due on or before **Oct. 13, 2026**, and reply comments are due on or before **Nov. 12, 2026**
- The two NPRMs, “**Ensuring Children’s Safe Use of Screens and E-Rate-Funded Services**” and “**Promoting Fair and Open Competitive Bidding in the E-Rate Program**” ([FCC-26-41](#)), are premised on limiting student screen time in schools as a requirement to receive E-Rate funding.
- The NPRM goes far beyond just screen time to include:
 - Should the E-Rate program be limited or sunset to reflect today’s extensive connectivity rates?
 - Should CIPA compliance include [student] screen-time limits or monitoring?
 - Should funding be eliminated from applicants with the lowest discount percentages?
 - Did Congress intend for the [FCC’s] decisions about the E-Rate program to be based on educational outcomes? If so, how should the Commission measure educational outcomes?
 - Should E-Rate funding be phased out for schools and libraries in areas with the lowest NSLP participation rates
- **AGAIN....MORE INFORMATION TO COME!!**



USAC's One Portal

Find Sign-In at: <https://www.usac.org/e-rate/>

After logging in and entering the one-time verification code, you'll see the One Portal Dashboard.

The image shows a composite of three screenshots from the Universal Service Administrative Co. (USAC) E-Rate portal. The top-left screenshot shows the main navigation bar with the USAC logo, links for 'Subscribe', 'Payments', 'Open Data', and a 'Sign In' button highlighted with a red box. Below the navigation bar is a large banner for 'E-Rate' with the text 'Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet'. The top-right screenshot shows the login form with fields for 'Username' and 'Password', a 'Forgot password?' link, and a disclaimer about system access. The bottom screenshot shows the 'Dashboard' after login, with a blue header bar containing the USAC logo and a 'Sign Out' button. The dashboard includes a notification banner about supply chain orders, a section for 'Upcoming Dates' (showing 'No upcoming dates found.'), a section for 'Schools and Libraries' with two highlighted boxes: 'E-rate Productivity Center (EPC)' and 'Emergency Connectivity Fund (ECF)', and a 'Help?' section with links to 'Send us a message' and 'Call us'.

Universal Service Administrative Co.

Subscribe Payments Open Data **Sign In**

About ▾ E-Rate ▾ Rural Health Care ▾ Lifeline ▾ High Cost ▾ Service Providers ▾

E-Rate

Ensuring that schools and libraries across the U.S. are connected to information and resources through the internet

Universal Service Administrative Co.

Sign Out

lorrie.germann@gmail.com ▾

Dashboard

❗ In accordance with the Supply Chain orders, new certifications have been added to the following forms: RHC - FCC Form 463 and the Telecom invoice, E-rate - FCC Form 473, and High Cost & Lifeline - FCC Form 481. Service providers are required to submit these annual certifications. For additional information, visit the [USAC Supply Chain](#) page.

Upcoming Dates

No upcoming dates found.

Schools and Libraries

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

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

Help?

Send us a message [Click here](#)

Call us
(888) 641-8722

Click here for the [EPC How-To Guide](#)

Portal Access – Add Text MFA Option

The screenshot shows the Universal Service Administrative Co. portal dashboard. The header is blue with the company logo and name on the left, and a 'Sign Out' button on the right. Below the header, the 'Dashboard' title is followed by a horizontal line. The main content area includes sections for 'Upcoming Dates' (with a calendar icon and 'Fall Training: 10/16'), 'Schools and Libraries' (with an upward arrow icon), and 'Help?' (with links to 'Send us a message' and 'Call us'). A red box highlights the user's email address 'lorrie.germann@gmail.com' and a 'Settings' link below it. An orange arrow points from the 'Settings' link to the 'Extra Verification' section. The 'Extra Verification' section is a dark grey box with a checkmark icon, containing text about account security and a 'Text Message Code' section with a 'Setup' button (indicated by a wrench icon).

After initially logging in, but before clicking on “EPC”, click on the pull-down to the right of your username to see “Settings”. Scroll down to see “Extra Verification” and click on “Setup”. Provide your phone number and enter the code you’ll receive on your phone, then “Verify”, and “Done”.

EPC Entity Profile – Account Administrator

News Tasks (2) Records **Reports** Actions

My Applicant Landing Page

Training
Universal Service Administrative Co.

Welcome, Independent School 714!

Pending Inquiries

Type -- Select a Type --
Funding Year -- Select a Funding Year --

Application/Request -- Enter an Application/Request ID or Nickname --

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

APPLY FILTERS CLEAR FILTERS

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

Landing Page View

My Applicant Landing Page



Welcome, [School District 10997!](#)

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

Pending Inquiries

Type

Application/Request

Funding Year

Notifications

Notification Type

Funding Year

Status  ☒ All

☐ Generated

☐ Not Generated

APPLY FILTERS

CLEAR FILTERS

Notification	Description	Issued Date	Generated By	Generated On	
No items available					

My Entities

Entity	Entity Number	City	State	Zip Code
School District 10997	10426	Rockville	MD	20850
School 2 In District 10997	6911	Rockville	MD	20850
School 3 In District 10997	6912	Rockville	MD	20850

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

Category 2 Budget Tool

1

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.

Records: Applicant Entities

#10426 - School District 10997

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

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

Organization Details

Name: School District 10997
Entity Number: 10426
FCC Registration Number: 0123456789
Applicant Type: School District
Status: Active

Contact Information

Physical Address: 1 Main Street, Rockville, MD 20850, Montgomery County
Mailing Address: 1 Main Street, Rockville, MD 20850, Montgomery County
Phone Number: 012-345-6789
Email: school_dist_10997@education.com
Website URL:

Account Administrator

Name: First Name Last Name

General Contact

A General Contact has not been indicated.

Applicant Information

School District Sub-Type: ☐ Public School District ☐ Private School District ☐ Charter School District ☐ Other School District
Does this organization have an endowment? No

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 reuse 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.

How does the district report its student count for Category Two budget?

☐ One number for my whole district
☒ A number for each school in the district

Sum of Student Counts of all Schools in the District: 1425

School Information

Entity Number or Name:

APPLY FILTERS CLEAR FILTERS

Entity Number	Entity Name	Total Students for C2 Budget	Is the student count estimated?	Eligible for C2 budget?
6911	School 2 In District 10997	376	N/A	Yes
6912	School 3 In District 10997	420	N/A	Yes
6913	School 1 In District 10997	637	N/A	Yes

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

News Tasks (1) Records Reports Actions

Records / Applicant Entities

321456 ABC CITY SCHOOLS

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

Category Two Budget Status

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

GET CATEGORY 2 BUDGET INFORMATION

Click on “Category 2 Budget” and then “Get Category 2 Budget Information”.

Category Two Budget Status

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

✓ 2026 - 2030

✓ 2026 (Budgeted Entity)

> Show column definitions

Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Forecast	\$288,446.67	\$0.00	\$0.00	\$0.00	\$288,446.67	View Details

✓ 2021 - 2025

✓ 2021 - 2025 (Budgeted Entity)

> Show column definitions

Budget Status	Budget	Total In-Review Requested Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget	
Preliminary	\$92,500.00	\$93,496.00	\$0.00	\$93,496.00	\$0.00	View Details

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.

My Landing Page



Training

Universal Service
Administrative Co.

Welcome, [School District 18!](#)

Notifications

Notification Type Please select a value

Funding Year -- Select a Funding Year --

Status ? ☒ All
☐ Generated
☐ Not Generated

Notification	Description	Issued Date	Generated By
No items available			

My Entities

Entity	Entity Number	City
School District 18	170	Springfield
School District 18 NIF	171	Springfield
School District 18 School A	172	Springfield

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.

[Records](#) / [Applicant Entities](#)

#6913 - School 1 In District 10997

[MANAGE ORGANIZATION](#) [MANAGE ANNEXES](#)

[Summary](#) [Modifications](#) [Additional Information](#) [Category Two Budget](#) [Contracts](#) [FCC Forms](#) [News](#) [Related Actions](#)

Organization Details

Name	School 1 In District 10997	Applicant Type	School
Entity Number	6913	Status	Active
FCC Registration Number	0123456789		

Contact Information

Physical Address	1 Main Street Rockville, MD 20850 Montgomery County	Phone Number	012-345-6789
		Email	school_1_dist_10997@testmail.usac.org

Modify An Organization - School Detail View

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

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!

Modify An Organization - School Detail View

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 | ☐ New Construction School |
| ☐ Head Start | ☐ Swing Space |
| ☐ Adult Education | ☐ Detention Center |
| ☐ Juvenile Justice | ☐ General-Use School |
| ☐ Dormitory | ☐ ESA School |
| ☐ Charter School | ☐ BIE |
| ☐ Tribal School | |

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.

Modify An Organization - School Detail View w. CEP

School Information

School Sub-Type *

☒ Public School

☐ Private School

Check All That Apply [Show Help](#)

☐ Pre-K

☐ Head Start

☐ Adult Education

☐ Juvenile Justice

☐ Dormitory

☐ Charter School

☐ Tribal School

Is this school part of a school district?

Yes

☐ New Construction School

☐ Swing Space

☐ Detention Center

☐ General-Use School

☐ ESA School

☐ BIE

Number of Full Time Students *

531

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

507

Community Eligibility Program (CEP)? *

☒ Yes

☐ No

CEP Percentage *

59.57%

CEP Base Year *

2023

CEP Percentage (Number to use in EPC portal if school participates in CEP)

59.57%

- 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.

Modify An Organization - School Cat 2 Enrollment

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 *

FCC Registration Number ⓘ

- The Cat 2 budget and the discount rate are calculated separately. Enter the new enrollment to start a new 5-year budget cycle if you didn't do so during FY2026.
- You can keep the Cat 2 count year to year, but you can update it if enrollment increases later in the cycle. **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 FY2027 counts”).

What's Next? Get Started Now!

- Administrative Window Updates (starting 10/21)
 - Schools - Update enrollment/NSLP in EPC
 - Schools - Update C2 enrollment, if increase
 - Libraries – Update square footage if needed
- Review Category 1 contract
 - Contract expiring June 30, 2027?
 - Need more bandwidth? Does your current contract allow for an increase?
 - Check with the provider if you're not sure!
 - If needed, file FY2027 Form 470s by the end of December if possible
- Determine what equipment will be needed in the upcoming year for schools or libraries
 - File FY 2027 C2 Form 470s by end of December if possible

Make and follow your FY 2027 E-Rate Plan!



Where to Go for E-Rate Help

- **USAC's Client Service Bureau (CSB)**
 - E-Rate “Help Desk” where applicant & service providers can get answers to questions
 - Call **888-203-8100**
 - Submit a ‘Customer Service Case’ in EPC
- **OH E-Rate Coordinator**
 - E-mail Lorrie Germann at lorrie.germann@education.ohio.gov
 - Call: 740-253-1153
 - Attend webinars!
 - Subscribe/read listserve messages!
 - <https://www.ohio-k12.help/e-rate-support>
 - **Helpful Documents:** <https://www.ohio-k12.help/e-rate-support/resource-library/>
 - **Training:** <https://www.ohio-k12.help/e-rate-support/e-rate-events/>

