



Fall FY2027 Library E-Rate Veteran's Workshop

Lorrie Germann, State E-Rate Coordinator



Thanks for joining us, we'll get started at 1:00

For a copy of today's handout, go to

<https://www.ohio-k12.help/erate/E-Rate-resources/>

Lorrie Germann, State E-Rate Coordinator



Agenda for Today

- **Completing FY 2025 – Slide 4**
- **Where Are You At For FY 2026 – Slide 11**
- **Preparing For FY 2027 – Slide 19**
- **What's New!? – Slide 28**
- **Category 2 Budget Cycle– Slide 37**
- **Application Process Reminders – Slide 42**



Completing FY 2025
(July 1, 2025 – June 30, 2026)

BEAR Reimbursement Deadlines

- BEAR Form 472 – Form that must be submitted within 120 days of last date to receive service or equipment
- **For FY 2025 *recurring services***
 - **October 28, 2026** is the invoicing deadline
 - Last date to receive service was June 30, 2026
- **For FY 2025 *non-recurring purchases***
 - September 30, 2026 was last date to receive/install equipment
 - Jan 28, 2027 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 must be requested **within 15 days after the invoice deadline**
- 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/>



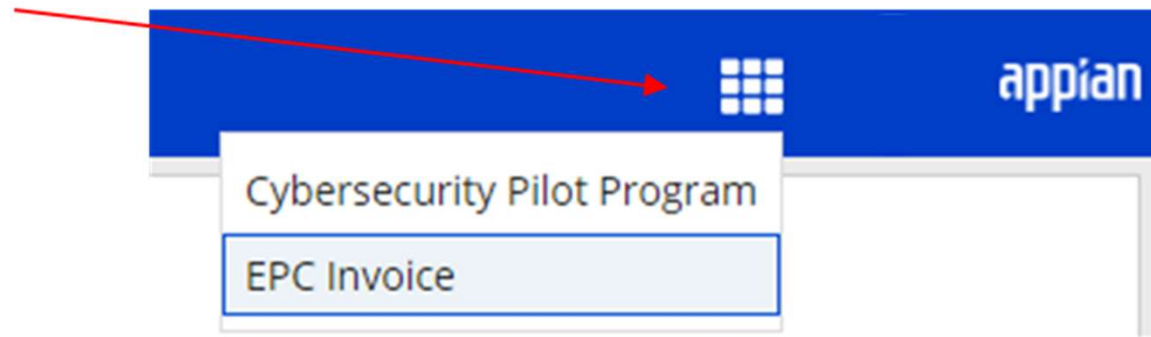
UEI Numbers & Form 498

- 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!**
 - **If you file a BEAR without the UEI added, USAC will hold payments until this is done!**
- 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



BEAR – EPC Invoicing

- 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**
- FRNs will not display where SPI was selected as the Invoice Mode on the FY 2026 Form 471, a SPI has already been filed, or the provider hasn't filed their SPAC for the funding year



Invoice Disbursements Data Lookup Tool

- Shows details for all *disbursements* authorized since July 2016
 - Does not 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 to the BEAR Form can complete the certification and return it directly to USAC.

SPI 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."

Again... Only an applicant with full user rights to the **BEAR Form** can complete the SPI certification and return it directly to USAC

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 2026

(July 1, 2026 – June 30, 2027)

***Updates & Where Are You
At In The Process***

Status of Ohio FY 2026 FCDLs

Applicant Type ▼	Total Funding Requested
Consortium	\$3,998,778.90
Library	\$45,435.46
Library System	\$3,692,526.43
School	\$12,087,707.23
School District	\$75,765,169.07
Grand Total	\$95,589,617.09

Service Type ▼	Funding Requested	No. of FRNs
Basic Maintenance of Internal Connections	\$597,220.82	57
Data Transmission and/or Internet Access	\$45,915,582.09	1,839
Internal Connections	\$40,411,980.34	805
Managed Internal Broadband Services	\$8,664,833.84	561
Grand Total	\$95,589,617.09	3,262

Status of Library's FY 2026 FCDLs

- There were 157 FRNs submitted (not including OPLIN FRNs):

Library Status 	No. of FRNs	No. of FRNs Listed on a Form 486
Funded	134	123
Pending	23	
Grand Total	157	123

- Of the funded 134 FRNs, **11 still need a Form 486 filed**

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.



Status of Ohio Pending FY 2026 FCDLs

- FRNs still pending by Service Type:

Pending Funding Status By Service Type 	No. of FRNs	Funding Amount
	632	\$28,802,323.04
Basic Maintenance of Internal Connections	24	\$254,532.59
Data Transmission and/or Internet Access	293	\$11,672,944.98
Internal Connections	170	\$12,133,031.56
Managed Internal Broadband Services	145	\$4,741,813.91

- 632 FRNs still “pending” for 238 entities totaling \$28.8 million
- Last time this year, we had 252 pending FRNs!
- We believe the slowness is due to:
 - A new contractor handling PIA (started Jan. 2, 2026)
 - The need for PIA to verify Cat 2 enrollment to calculate the new 5-year budget for all Cat 2 funding requests

FY 2026 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!
 - USAC has assured us that they are still actively reviewing applications!
- 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!



FY 2026 Form 486s

- If you have been funded for FY 2026, 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**



How to Modify Your FY 2026 Invoicing Method

On the FY 2026 Form 471, we were required to indicate the Invoice Mode per funding request: BEAR or SPI. Here are the steps to change the mode, if needed.

Before receiving a Funding Commitment Decision Letter (FCDL):

- Submit a RAL Modification Request during the review of your FCC Form 471 application.

After receiving an FCDL:

- Submit an FCC Form 500 using the new “Invoicing Method” change request **after filing the Form 486**.
- This change request must be submitted before any invoice is submitted for the FRN.

The screenshot displays the 'Type of Change' form within the USAC system. The form is titled 'Type of Change' and includes a navigation bar with 'News', 'Tasks (8)', 'Records', 'Reports', and 'Actions'. The 'SU' logo and 'appian' branding are visible in the top right corner. The form contains several sections, each with a title, a description, and a 'YES'/'NO' button. The sections are: 'I want to change the service start date.', 'I want to change the contract expiration date.', 'I want to request more time to get the services delivered and/or installed.', 'I want to cancel one or more of the FRNs.', 'I want to change the Invoicing Method.', and 'I want to partially reduce the funding in one or more of the FRNs.'. The 'I want to change the Invoicing Method.' section is highlighted with a red border. At the bottom of the form, there are 'CANCEL' and 'CONTINUE' buttons.

News Tasks (8) Records Reports Actions

SU appian

Type of Change

I want to change the service start date. * [\(More Info\)](#)
Complete if you wish to change the Service Start Date you listed on a previously filed FCC Form 486. This action will NOT increase funding.

YES NO

I want to change the contract expiration date. * [\(More Info\)](#)
Complete if the contract expiration date has changed and you wish to report the change to USAC. This action will NOT increase funding but you could combine it with a funding reduction.

YES NO

I want to request more time to get the services delivered and/or installed. * [\(More Info\)](#)
Complete if you are requesting an extension of the deadline for delivery and installation of non-recurring services or to complete Category One special construction and light the new fiber. For most non-recurring services, you must submit this request to USAC on or before the September 30 following the close of the funding year. For an extension of the deadline to complete Category One special construction and light the associated fiber, you must submit this request to USAC on or before the June 30 of the funding year. This action will NOT increase funding.

YES NO

I want to cancel one or more of the FRNs. *

YES NO

I want to change the Invoicing Method. * [\(More Info\)](#)
Complete this section if you wish to change the invoicing method (BEAR/SPI) approved for the FRN. This request must be received before the invoice filing deadline.

YES NO

I want to partially reduce the funding in one or more of the FRNs. *

YES NO

CANCEL CONTINUE

FCC FY 2026 ESL BMIC Update

The FCC's Wireline Competition Bureau (WCB) released the FY 2026 eligible services list (ESL) Order ([DA 25-1069](#)) on December 17, 2025, to include the following:

- Treat all currently eligible software- or remote-based services, including bug fixes, security patches, software-based technical assistance, and configuration changes the same and have applicants request all software- and remote-based services with the internal connections equipment that they support.
- The Order permits applicants that had sought funding for software-based BMIC services on a prorated basis in prior funding years to request discounts on the remainder of the contract in FY 2026 or continue requesting pro-rated support.
- **It also clarifies that applicants that seek support for software- or remote-based services as internal connections in FY 2026 that were competitively bid as BMIC services are not violating the competitive bidding rules.**

FCC FY 2026 ESL BMIC Update Cont.

- **Amending the entries for “Eligible Broadband Internal Connections”** to include software-or remote-based services, including bug fixes, security patches, software-based technical assistance, and configuration changes.
- **Amending the bullets listed under “Basic Maintenance of Eligible Broadband Internal Connections”** to limit configuration changes to those performed in person and deletes “Basic technical support including online and telephone-based technical support” and “Software upgrades and patches including bug fixes and security patches.”
- **Amending the language in “eligibility limitations for basic maintenance”** to delete language related to bug fixes, security patches, and technical support.
- Applicants would request all software-based and remote-based services with the **internal connections equipment that they support.**

Preparing For FY 2027
(July 1, 2027 – June 30, 2028)

FY 2027 “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 21st. 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 the upcoming year
 - Confirm all entities, including NIFs, are in the EPC portal
 - **Category 2 Budgets:** Update square footage changes (libraries)
 - Square footage is needed per library location to calculate the new Cat 2 budget



>>> EPC Landing Page > Library Name > Manage Organization > Scroll to the bottom of the page to see the Category 2 Budget field. Enter the correct square footage and submit. You’ll be asked to enter a nickname for the change. Repeat for each library in the library system that needs to be updated.

Eligible C1 Service

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

Eligible Internal Connections Items

- 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.

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

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 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

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



***What's New
(or things we don't
know yet!!)***

FCC Order 26-30

On April 30 2026, the FCC released Order [26-30](#) establishing:

- Additional invoice deadline flexibility.
- Changes to cost allocation.
- **FY 2028** will see the implementation of:
 - Competitive Bidding Portal
 - FCC Form 486 CIPA confirmation moving to FCC Form 471

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.**
- For cost allocations, the FCC clarified that the ancillary use presumption explained in [FCC 23-56](#) applies to all Category One (C1) services including data transmission services, wide area network services, ethernet, etc.

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.
- **During D.C. training, USAC stated that funding requests based on a multi-year contract awarded prior to FY 2028 will require uploading bidding documents into the bidding portal. It is unclear if previously provided documentation will be auto-uploaded.**
- USAC will update users via our News Brief as we are informed of changes.

Sunsetting FCC Form 486

- Funding Year 2028 will phase out the standalone filing requirement for FCC Form 486.
- Required CIPA compliance certifications will be integrated upstream into the FCC Form 471 application process.
- **Applicants must continue to meet standard Form 486 deadlines (120 days from the service start date or the Funding Commitment Decision Letter date, whichever is later) until the phase-out is complete (i.e., FY 2026 and FY 2027 funding requests!!)**

Transition of Services Changes

- E-Rate will create a process for applicants who are transitioning services to file a post-commitment request for changes.
 - Service start date
 - Service end date
- The applicant must meet certain criteria.
- This process will require form changes and will go into effect in a future funding year after approval from the Office of Management and Budget (OMB).

Transition of Services Changes: Increasing Post-Commitment Funding

E-Rate may approve a post-commitment increase if the applicant:

- Filed partial funding year requests for funding from both service providers
 - (or service offerings, in the case of a transition to a different service from the same service provider)
- Indicated the following on the FCC Form 471
 - best estimates of the transition dates indicated
 - the requests were for a transition of service
 - if there are available funds below the E-Rate program funding cap

Will MIBS Continue to Be Eligible?

- We are currently waiting for the FY 2027 Eligible Service List (ESL) to be approved.
- Per the draft ESL NPRM, the FCC is considering whether MIBS should continue to be eligible.
- The decision will be stated in the released/approved ESL.
- **MORE INFORMATION TO COME!!**

The Future of E-Rate

- The FCC released two E-Rate Notices of Proposed Rulemaking (NPRMs), taking a top-to-bottom look 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?
 - At what point should policymakers conclude that the program’s core objective has been achieved?
 - Should CIPA compliance include [student] screen-time limits or monitoring?
 - Should the program be limited to rural areas or areas served by a single provider?
 - Should E-Rate funding be phased out for schools and libraries in areas with the lowest NSLP participation rates
 - 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?
- **AGAIN....MORE INFORMATION TO COME!!**



Category 2 Budgets

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 FY 2026-2030 cycle.
- The C2 budget is calculated at the library system level based on the combined square footage (libraries).
- **To qualify for Category 2 funding, you must be CIPA-compliant**

FY2026-2030 C2 Budget Cycle Updates

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.

Establishing Your New C2 Budget

- 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 square footage has increased for the next year.

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.

Library	Sq. Ft.	Budget Calculation (\$4.50/sq. ft.)	Budget Received (Use the minimum budget if the calculation is less)	
Central Main Branch	14,500	\$78,735.00	\$78,735.00	Based on sq. ft. count
East Branch	8,000	\$43,440.00	\$43,440.00	
North Branch	9,873	\$53,610.39	\$53,610.39	
West Branch	5000	\$27,150.00	\$30,175.00	Based on the budget floor
ABC Bookmobile	256	\$1,390.08	\$30,175.00	
Totals	37,629	\$204,325.47	\$236,135.39	

!! If applying for Category 2 funding, provide square footage for all library locations, even Bookmobiles & Kiosks!!

Application Process Reminder

FY 2027 Application Timeline

E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - December
2) Update EPC Profiles - Admin Window	Oct 21 st - 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 the 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

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 6/30/2027)

- 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 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 at least 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
 - 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/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

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

Sample Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	Date of RFP Upload 1 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.

Portal Access – Add Text MFA Option

The screenshot shows the Universal Service Administrative Co. portal dashboard. At the top left is the logo and name. At the top right is a 'Sign Out' button. Below the header is a 'Dashboard' section. On the left, there are links for 'Upcoming Dates' and 'Schools and Libraries'. In the center, there is a section for 'E-Rate Productivity Center (EPC)'. On the right, there is a 'Help?' section with links to 'Send us a message' and 'Call us'. A red box highlights the user profile area, which shows the email 'lorrie.germann@gmail.com' and a 'Settings' link. A red arrow points from the 'Settings' link to the 'Extra Verification' modal. The modal has a title 'Extra Verification' with a checkmark, a description 'Extra verification increases your account security when signing in to Okta and other applications you use.', and a 'Text Message Code' section with a 'Setup' button.

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”.

Category 2 Budget In EPC

My Applicant Landing Page



Training

Universal Service
Administrative Co.

[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](#)

Welcome, School District 10997!

Pending Inquiries

Type -- Select a Type --

Funding Year -- Select a Funding Year --

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

Notifications

Notification Type Please select a value

Funding Year -- Select a 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
Library System 10344	1979	Rockville	MD	20850
Library 1 In System 10344	3313	Rockville	MD	20850
Library 2 In System 10344	3314	Rockville	MD	20850

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

Category 2 Budget Tool

1 Entities

Entity	Entity Number	City
Library System 10344	1979	Rockville
Library 1 In System 10344	3313	Rockville
Library 2 In System 10344	3314	Rockville

- Start my clicking on the Billed Entity under “My Entities”.

Records / Applicant Entities

#1979 - Library System 10344

[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](#) [FRN Appeals](#) [News](#) [Related Actions](#)

Organization Details

Name	Library System 10344	Applicant Type	Library System
Entity Number	1979	Status	Active
FCC Registration Number	0123456789		

Contact Information

Physical Address	Address1 Rockville, MD 20850	Phone Number	012-345-6789
Mailing Address	Address1 Rockville, MD 20850	Email	library_sys_10344@mailinator.com
		Website URL	

Account Administrator

Name FirstName LastName

General Contact

Name FirstName LastName

Applicant Information

Library System Sub-Type ☒ Public Library System ☐ Private Library System

Category Two Budget Information

Sum of Square Footage of All Libraries in the System 16000

Main Library Branch

Library 1 In System 10344 (Entity Number 3313) Rockville,MD

The Summary page shows the combined square footage for the library system. Make sure that the number is correct.

Category 2 Budget Tool

News Tasks (1) Records Reports Actions

Records / Applicant Entities

#1979 - Library System 10344

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	\$111,625.00	\$0.00	\$0.00	\$0.00	\$111,625.00	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



Universal Service
Administrative Co.

Notifications

Notification Type

Funding Year

Notification	Description	Issued Date
--------------	-------------	-------------

My Entities

Entity	Entity Number	City	State	Zip Code
ABC Library System	170	Springfield	OH	45501
ABC Main Library	171	Springfield	OH	45501
South Branch	172			
North Branch	173			

Library Detail Page

To update, click on the name of each library, and then “Manage Organization”, to edit information pertaining to this building, such as site name, address, or square footage.

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

[Records / Applicant Entities](#)

#17011069 - ABC LIBRARY SYSTEM - OHIO COUNTY - Main

[Manage Organization](#)

[Manage Annexes](#)

Organization Details

Name	Ohio County Library	Applicant Type	Library
Entity Number	17011069	Status	Active
FCC Registration Number			

Contact Information

Physical Address	407 S 4TH ST OH 43952-2942	Phone Number	740-282-9782
Mailing Address	407 S 4TH ST OH 43952-2942	Email	
		Website URL	

Modify An Organization - Library Detail View

Modify An Organization

Name *

NORTHWEST LIBRARY

Physical Address

Address Line 1 *

2280 HARD RD

Address Line 2

City *

COLUMBUS

State *

OH

Latitude / Longitude

User-entered Latitude ?

User-entered Longitude ?

Urban/Rural

User Entered Urban/Rural Status *

☐ Rural

☒ Urban

Mailing Address

☒ Mailing address is the same as physical address.

Address Line 1

2280 HARD RD

Address Line 2

City

COLUMBUS

State

OH

Other Methods of Contact

Phone Number *

614-645-2656

Ex: 000-000-0000

Email

Website URL

Organization Type

Applicant

Zip Code *

43235

Zip Code Extension

Click the button below to get standard USPS address

County *

Please select a County

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

VERIFY MY ADDRESS

Latitude ?

Longitude ?

LOOKUP URBAN/RURAL STATUS

Urban/Rural Status ?

☐ Rural

☐ Urban

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

Zip Code

43235

Zip Code Extension

County

Phone Number Extension

View after clicking on “Manage Organization”

From here, you can correct building addresses.

Keep scrolling down (it’s a **really** long screen) to see the square footage field.

Modify An Organization - Main Library Detail View

Library Information

Library Sub-Type *

☒ Public Library

☐ Private Library

Check All That Apply

☐ Academic

☐ Research

☐ Tribal Library

☐ Bookmobile

☐ Kiosk

☐ New Construction Library

☒ Main Branch

☐ State Library Agency - Library

FSCS KEY

FSCS SEQ

Associated School District

BEN	NAME	CITY	STATE	ZIP CODE
129000	Ohio Central School District	Any Town	OH	43085

If this library is no longer a main branch, please unselect the Main Branch Checkbox

Search for School Districts

BEN Search

Name Search

State Search

Please select a value

Zip Code Search

FCC Registration Number ⓘ

CLEAR FILTERS

SEARCH

CANCEL

SUBMIT

Enter or update Square Footage.

Verify Library information, and click on "Submit"



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>
 - 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/>