



Fall FY2025 E-Rate Beginners Workshop for Libraries

For a copy of today's presentation, go to
<https://www.ohio-k12.help/erate/e-rate-resources/>

Lorrie Germann, State E-Rate Coordinator



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

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Lorrie Germann, State E-Rate Coordinator



Agenda for Today

- E-Rate Overview
- Eligible Services and Equipment
- Program Updates (What's new for this upcoming year!)
- Category 2 Budgets
- Application Process
- E-Rate Productivity Center (EPC)

What is E-Rate?

- Annual \$3.9 billion federal program
 - Funding does not come from the federal budget
- 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 policy
 - USAC (Universal Service Administrative Co.) manages 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) starts on July 1 and ends the following June 30.
 - **Our current funding year, FY2024, started on July 1, 2024, and ends on June 30, 2025.**
 - **We are preparing to file for FY2025, which starts on July 1, 2025, and ends on June 30, 2026.**
- **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 and kiosks

- 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)



- Every “parent” organization (i.e., school district, library system) has a Billed Entity Number (BEN)
- Every “child” building must have an Entity Number
 - You must call USAC to obtain Entity Numbers for new buildings

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 square footage**
 - **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

Library Discount Calculations

- **Independent Library :**
 - Discount based on the % of students eligible for the NSLP in the school district in which that library is located, and whether the library is located in an urban or rural area
- **Library Systems:**
 - Discount based on the % of students eligible for the NSLP in the school district in which the system's main library is located
and
 - The % of libraries in urban/rural areas
 - If more than 50% are located in rural areas, then the rural discount should be used

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 = 29% and a majority of libraries are Urban

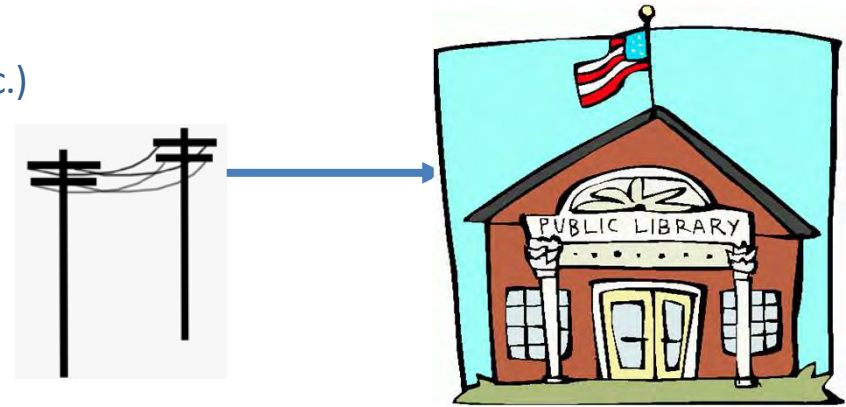
The background of the slide is a blurred image of a library. On the left, a book spine has the word 'E-Rate' written vertically. In the center, a white Wi-Fi symbol is overlaid with a dollar sign (\$) in the middle. On the right, a stack of books is shown, with a white label on top that says 'E-Rate' in a handwritten style. The overall scene is brightly lit and slightly out of focus.

E-Rate Eligible Services

Categories of Service

- **Category 1** – Services that go TO the 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 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 (less common):

- Microwave Service
- Broadband over Power Lines
- T-1, T-3, Fractional T-1
- DS-1, DS-2, DS-3
- OC-1, OC-3, OC-12, OC-n
- Frame Relay
- ISDN
- Satellite Services
- Stand-Alone Internet (no transport cost if own the fiber to your buildings, or a different vendor provides the circuits)
- Wireless data plans * (typically used for bookmobiles) where plans are the most cost-effective option

Not Eligible:

- Voice services
- Duplicative (redundant) services
- Filtering

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
- Equipment licenses
 - Pre-paid, multi-year licenses can be requested in first year
- Cloud-based functionality of eligible equipment
- Operating system software to support 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.

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



Search Results			
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 funding year start
 - For example, applicants can purchase equipment on April 1, 2025 for FY 2025, even though the funding year doesn't begin until July 1, 2025
 - **However...** vendors/applicants cannot be reimbursed from USAC until July 1
 - Applicants that purchase equipment prior to receiving funding commitment letter are risking paying full price
- Equipment can be purchased as late as September 30, following the end of funding year
- Allows applicants two full summers to install equipment

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

Basic Maintenance (BMIC)

- Special eligibility conditions:
 - 100% eligible = basic tech support, configuration changes
 - Costs common when purchasing new equipment
 - Not eligible = Next Business Day equipment replacement
 - Conditionally eligible = repair of equipment, cable maintenance
 - E-Rate will commit based on amount of contract
 - BUT.... Will only reimburse for time/parts used
- Multi-year, pre-paid contracts must be amortized
 - Cannot apply for full cost of multi-year BMIC contract in Year 1
 - Must amortize and request discounts for that year, annually
- Can only be for services/work performed during 12-month funding year (7/1/2025 – 6/30/2026)
 - Does not follow the 4/1/2025 – 9/30/2026 schedule

Mixed Functionality

Some equipment has **mixed** BMIC & Internal Connections (IC) functionality

- Some vendor licenses may include both **BMIC & IC** functionality such as **Right-to-Use (RTU)** and **Maintenance Services on the same license**.
****This is typical when requesting renewal licenses!!**
- Split the license based on functionality (i.e., RTU and maintenance) into separate FRNs for BMIC and IC
 - Contact the manufacturer or [USAC's Customer Service Center \(CSC\)](#) to obtain the breakdown for specific functionality that is included in a specific mixed services license

Tip 1: During your competitive bidding process, if you are seeking bids for Right-To-Use functionality and maintenance subscription services, be sure to post for all applicable service types on the FCC Form 470. **(i.e., IC and BMIC)**

Tip 2: If it contains features of **both** types, you should work with the vendor to determine if a separate identifiable price exists for the different aspects

Managed Internal Broadband Svcs

- 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

Library Small C2 Bidding Exemption

- Beginning in FY 2024, libraries are now exempt from bidding 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

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 within the BEN
 - If equipment is transferred between buildings within 5 years from date of purchase, applicants must record reason and date of transfer and update asset inventory
 - No notice to USAC is required
 - Asset inventory must be retained for 10 years from 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

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



What's New For FY2025?

Off-Premises Wi-Fi Hotspots: Now E-Rate Eligible

- On July 18, 2024, the FCC adopted a Report and Order ([FCC 24-76](#)) making **Wi-Fi hotspots and mobile wireless Internet services for off-premises use** eligible for E-Rate program support.
- This will allow eligible schools and libraries to start **Wi-Fi hotspot lending programs** so that their students, school staff, and library patrons with need can check out E-Rate-supported Wi-Fi hotspots and services to engage in remote learning.
- Accordingly, the FCC adopted certain limitations, including funding caps per device/service and budget entities, to ensure Wi-Fi hotspots are more effectively targeted to those with the greatest need.
- **If a library patron or student is using an E-Rate-funded hotspot on their own laptop (not a library or school-owned laptop), the library or school is not required to filter the Internet.**

Off-Premises Wi-Fi Hotspots: Now E-Rate Eligible

- Eligible schools and libraries can receive E-Rate support for Wi-Fi hotspots and mobile wireless Internet services that can be used **off-premises** by students, school staff, and library patrons.
- **3-year C1 budget, \$90 device /\$15 plan caps, 45% annual limit**
- Wi-Fi hotspots and Internet services are **subject to all existing E-Rate rules and requirements**, including competitive bidding, cost allocation, and discounting rules.
- Applicants who entered into multi-year agreements for Wi-Fi hotspots services in the Emergency Connectivity Fund (ECF) program are not exempt from competitive bidding requirements.
- Service provider selection must be consistent with E-Rate program rules, including selecting the most cost-effective service offering(s) and using the price of the eligible equipment and services as the primary factor in the evaluation matrix.

Calculating Wi-Fi Hotspot Budget: FY 2025-FY 2027

- The budget is the maximum amount of pre-discount funding permitted for Wi-Fi hotspots and/or service over three funding years.
- ***Library or Library System Budget =***
[square feet x (5.5 hotspots /1000 sq ft) x C1 discount rate] x \$630
- Calculate Wi-Fi hotspots and service budgets by **multiplying square footage, allowing 5.5 devices per 1,000 square feet, and multiplying that by the C1 discount rate. This number is rounded up to the nearest ten. The applicant then multiplies that rounded number by \$630 to determine the three-year pre-discount budget.**

Calculating Hotspot Budget Examples

*Budget is rounded up to the nearest 10 when multiplying the bracketed elements

Library or Library System		
Square Footage	Discount Rate	Hotspot Budget (FY25-27)
10,000	90%	\$31,500 [10,000 square feet x (5.5 hotspots/1000 square feet) x 0.9] x \$630 = \$31,500
100,000	90%	\$315,000 [100,000 square feet x (5.5 hotspots/1 000 square feet) x 0.9] x \$630 = \$315,000

Go to <https://www.ohio-k12.help/e-rate-support/resource-library/> for a copy of the hotspot budget tool

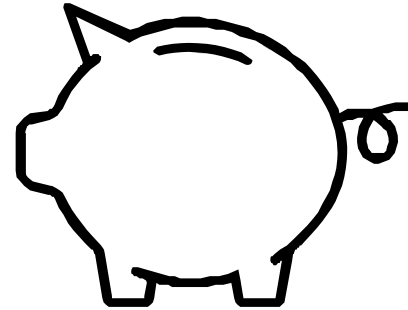
Enter the Total Library Square Footage for All Branches	Enter Discount Percentage	Total Per Hotspot 3-Year Amount	Maximum Number of Hotspots You Are Eligible For	Hotspot 3-Year Budget
10,000	90%	\$630	50	\$31,185.00

Three-Year Budget Cycle

- Fixed three-year budget cycles, beginning with funding years 2025 through 2027, after which the budgets will reset.
- The Wi-Fi hotspot budget represents the **maximum pre-discount amount** an applicant may request across three funding years, rather than an allocation of funding for Wi-Fi hotspots and service lines for which an applicant is entitled reimbursement.
- Entities are allowed to spread out their requests for Wi-Fi hotspots and services over the three-year timeframe, but the total pre-discount amount cannot exceed the budget over the three funding years.
- **Applicants may not request more than 45% of its three-year budget in any one year.**

Funding Caps: Devices & Internet Access Service Plans

- Pre-discount cost limitations (caps) of \$630:
 - Recurring wireless Internet service: \$15/month x 36 months
 - Wi-Fi hotspot: \$90/device
- **Taxes are not included in the capped amounts.**
- **Activation and configuration costs are included in the capped amounts.**
- All taxes and fees should be requested on separate funding request line items and separately identified on invoices.
- Applicants are permitted to select a Wi-Fi hotspot or service that costs more than the funding caps, but **E-Rate commitment amounts will not exceed the funding caps.**
- As with all other E-Rate services, billed rates must not exceed the contracted rates and USAC will only pay up to the committed and contracted rate.



Wi-Fi Hotspots: E-Rate Eligible

- **Wi-Fi hotspot** is a device that is intended to **provide Wi-Fi connectivity to a hotspot user as its sole function.**
- Wi-Fi hotspots (device) will be **eligible as Category One (C1) network equipment** necessary to make C1 wireless Internet services functional.
- In the event demand exceeds available funding, off-premises Wi-Fi hotspot equipment and mobile wireless Internet services requests will be prioritized after on-premises Category 1 and 2 equipment and service requests.

Eligible Equipment and Services



- **To be E-Rate eligible, Wi-Fi hotspots must:**
 - Be portable.
 - Be a single device (i.e., not a set of linked devices).
 - Be for use with a commercially available mobile wireless Internet service.
- **What is NOT eligible for E-Rate funding:**
 - Multi-functional devices (e.g., smartphones, PCs, notebooks, tablets, customer premises. equipment, routers or switches, and wireless access points, etc.).
 - Wireless services delivered to any broadband-enabled end-user devices (e.g., laptops, tablets), fixed wireless connections and the related equipment, private 5G/LTE networks, fiber, and network expansion or construction.
- In addition, 1:1 Wi-Fi hotspot initiatives are not allowed, and each hotspot must have an associated line of service to be eligible for E-Rate funding. Hotspots may not be warehoused/stored for future use or as replacements for lost, damaged, or stolen devices.



Category 2 Budget

Category 2 Basics

- To qualify for Category 2 funding, you must be CIPA-compliant
- We have a set 5-year cycle (FY2021-FY2025), (FY2026-FY2030), etc.
- **FY2025 is the last year of the FY2021-2025 funding cycle.**
- All C2 budgets will reset in FY2026
- C2 budget is calculated at the library system level based on the combined square footage
- Multiplier is set for the full 5-year cycle and will not be adjusted for inflation each year
 - **FY2021-FY2025 = \$4.50 sq. ft. for ALL libraries**
 - **FY2021-FY2025 Budget Floor/Minimum = \$25,000.00**
 - *Budget floor applies to libraries with less than 5556 sq. ft.*

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 minimum budget is calculation is less)	
Central Main Branch	14,500	\$65,250.00	\$65,250.00	Based on sq. ft. count
East Branch	8,000	\$36,000.00	\$36,000.00	
North Branch	9,873	\$44,428.50	\$44,428.50	
West Branch	5000	\$22,500.00	\$25,000.00	Based on budget floor
ABC Bookmobile	256	\$1,152.00	\$25,000.00	
Totals	37,629	\$169,330.50	\$195,678.50	

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

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, library would still owe their 40% non-discounted share

What is YOUR Remaining Category 2 Pre-Discount Budget for Current 2 Budget Cycle?

Calculating Remaining C2 Budgets – Using USAC’s Open Data

What is your remaining Category 2 Budget for this C2 cycle?

1) Go to: <https://opendata.usac.org/E-Rate/E-Rate-C2-Budget-Tool-FY2021-/8z69-hkn7>

2) Enter BEN to filter just your entity’s data

3) Summary Table will appear

Review these columns:

Square
footage
currently in
EPC

5-Year
Pre-
Discount
C2 Budget

Filters (2) ✕

Clear All

State
OH ▼

Applicant Type
Select... ▼

City
Select... ▼

Billed Entity Name
Select... ▼

BEN
129999 ▼

Consulting Firm Name (CRN)
Select... ▼

Library... ⋮	School... ⋮	Library... ⋮	C2 Bud... ⋮	C2 Bud... ⋮	Funded... ⋮	Pendin... ⋮	Availab... ⋮
45,117		\$4.50	\$275,000.00	Confirmed	\$13,117.11	\$0.00	\$261,882.89

“Funded” amount
from FY2021-
FY 2023

Amount of
“pending
FRNs” in FY
2021, 2022,
2023

Remaining
available
C2 Budget



E-Rate Application Process

Application Process Overview

E-Rate Step	Suggested Timeline
1) Assess Needs/Create Your Plan	August - December
2) Update EPC Profiles - Admin Window	Oct - early January
3) Bid All New Services/Equipment – Form 470	Now - January
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)

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**
 - 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 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
- **Note:** If you were included on the OPLIN Omnibus Form 470 for circuits and award a contract, you do not need to file your own 470 for that service. **You will reference the OPLIN 470 number on the Form 471.**



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

- File before signing any new contract
- If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2026, you are **not** required to file a Form 470 for FY 2025

3. Bandwidth Upgrades

- If you're upgrading service mid-contract and the upgrades and associated prices are not included in the original contract

Contract Extensions:

- Permitted but must have been in original contract and must have definitive end date
 - For example, a 3-year contract, with two 1-year renewals. Will not require new 470 until the end of 5 years
 - **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, 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
- Helpful Form 470 Guides: <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

Requests for Proposals (RFPs)

- USAC considers any bidding document provided to vendors an RFP
- RFPs 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

Imposing Restrictions

- Cannot list specific make and model of services sought without also considering equivalent products and/or services.
 - “XYZ manufacturer's router model 345J **or equivalent**”
 - FCC Form 470 will ensure compliance but double-check your RFP to make sure you’ve included the “**or equivalent**” language.
- Applicants may set some eligible service requirements.
 - Applicants may require service providers to provide services that are compatible with one kind of system over another (e.g. Brand X compatible).
- **Disqualification criteria must be spelled out in FCC Form 470 and/or RFP and be available to all potential bidders.**


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)

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)** 
 - Make sure 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: Vendor Contracts

- Contracts (which include 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 6a: Upload New Contracts into EPC

All NEW contracts must be uploaded into the 'EPC Contract Module' before starting the Form 471

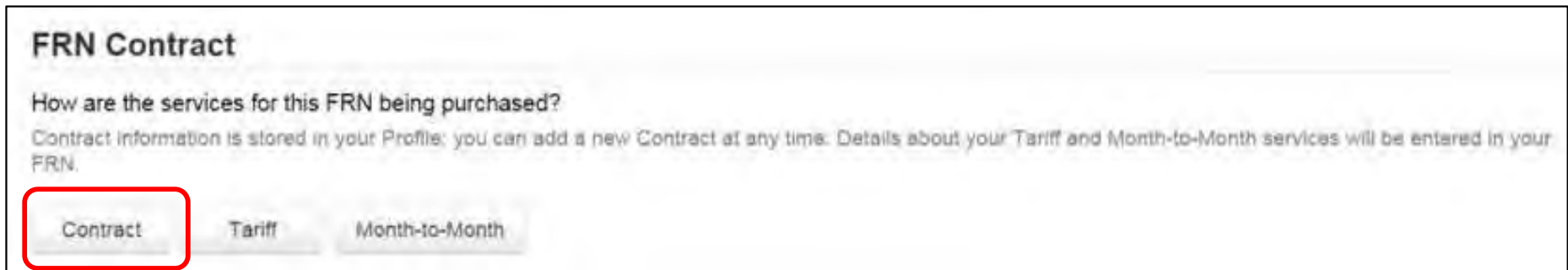
-- > EPC Landing Page > Library Name > Contracts from top toolbar



We'll cover this in more detail during Form 471 training!!

Purpose of Contracts Module

When completing a Form 471 Funding Request on the 471, you must indicate how you will be purchasing the requested services – either via a Contract, Tariff or Month-to-Month (MTM) basis:



The screenshot shows a form titled "FRN Contract". Below the title is the question "How are the services for this FRN being purchased?". A subtext explains: "Contract information is stored in your Profile; you can add a new Contract at any time. Details about your Tariff and Month-to-Month services will be entered in your FRN." At the bottom, there are three buttons: "Contract", "Tariff", and "Month-to-Month". The "Contract" button is highlighted with a red border, indicating it is the selected option.

If you select '**Contract**,' you will then be asked to select from the list of your Contract Records from the Contract Module.

The Contract Record selected will then be "linked" to the Form 471 Funding Request.

Step 6: Filing the Form 471

Purpose of the Form 471

- Filed **annually** by entity that actually pays the bills (the Billed Entity)
- Formally requests E-Rate funding commitments from USAC
- Asks detailed questions about services or equipment
- Shows 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 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



Step 7: PIA 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 FCDL

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 requests (FRNs) 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: 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

Service/Equipment Delivery Timelines

- 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)

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

Document Retention

- You must keep all documentation for 10 years from the last date to receive service.
 - For multi-year contracts this means 10 years from the contract expiration date.
- For example, for recurring internet access service for FY2025, both the applicant and the service provider must retain all records until at least June 30, 2036.
- Retain receipt and delivery records relating to pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to your applications.



Paying for Equipment/Services

- Applicant's choice
 - **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



Reimbursement Method - BEAR

- 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 bank account info would have been submitted on Form 498
 - Only submitted once (update, if needed)
- 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



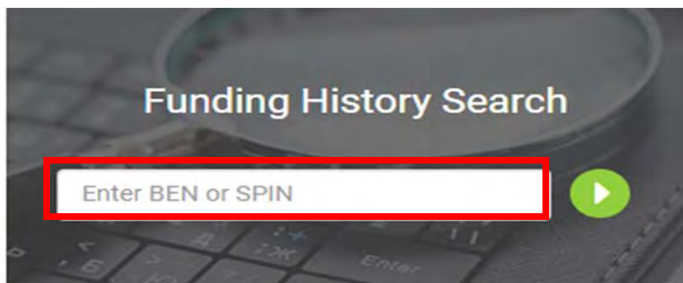
Discounted Bills Method - SPI

- 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



Quick Way to Get the Information Needed

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](#) | [All](#)

FY	Requested FRNs	Funded FRNs	486 on File	Requested Amount	Committed Category 1	Committed Category 2	Total Committed	Total Disbursed	Remaining Balance
2024	5	5	5	\$40,938.39	\$38,585.16	\$1,373.18	\$39,958.34	\$0.00	\$39,958.34
2023	4	4	4	\$38,649.75	\$38,649.75	\$0.00	\$38,649.75	\$38,004.77	\$644.98
2022	4	4	4	\$56,077.49	\$56,077.49	\$0.00	\$56,077.49	\$54,835.49	\$1,242.00

471	FRN	SPIN	Service Provider	Service*	Original Request	Current Commitment
241007061	2499006962	143001654	The Chillicothe Telephone Company	IA	\$25,423.20	\$25,423.20
241007061	2499006963	143001654				
241007061	2499006964	14305043				

471 Information	
471#:	241007061
SPIN:	143001654 The Chillicothe Telephone Company
Service Type:	Data Transmission and/or Internet Access
Status:	Funded Wave: 13 FCDL Date: 7/18/2024
Status Memo:	• MR1: Approved as submitted.
Service Start Date (471):	7/1/2024
Current Commitment:	\$25,423.20
Disbursed Amount:*	
Last Date of Service:	
Service Start Date (486):	7/1/2024
Payment Mode:	NOT SET
Undisbursed:	25423.20
Last Date to Invoice:	10/28/2025

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



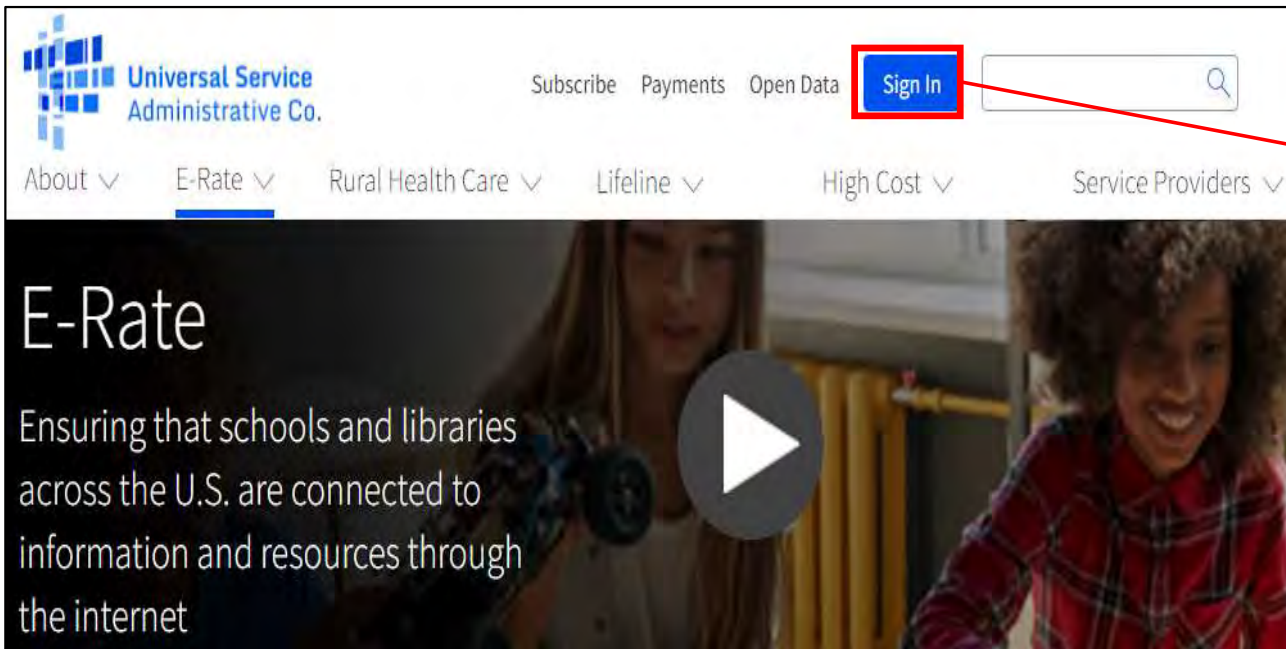
USAC's One Portal

USAC's One Portal

USAC uses multifactor authentication (MFA) to increase security.

We must log into One Portal to access the E-Rate Productivity Center (EPC) and ECF.

To access, go to <https://www.usac.org/e-rate/> and click on “Sign In” and then “Continue”.



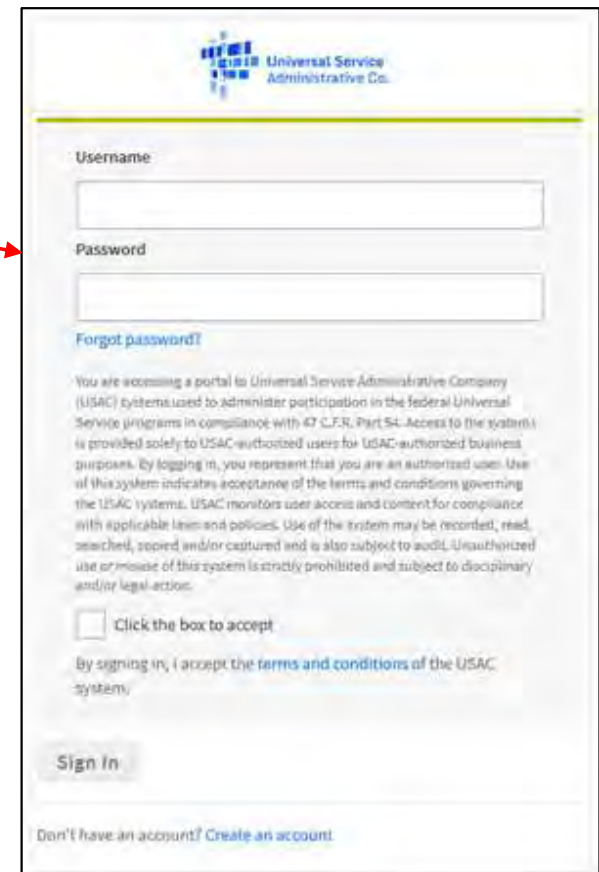
Universal Service Administrative Co.

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.

Username

Password

[Forgot password?](#)

You are accessing a portal to Universal Service Administrative Company (USAC) systems used to administer participation in the federal Universal Service programs in compliance with 47 C.F.R. Part 54. Access to the system is provided solely to USAC authorized users for USAC authorized business purposes. By logging in, you represent that you are an authorized user. Use of this system indicates acceptance of the terms and conditions governing the USAC systems. USAC monitors user access and content for compliance with applicable laws and policies. Use of the system may be recorded, read, searched, copied and/or captured and is also subject to audit. Unauthorized use or misuse of this system is strictly prohibited and subject to disciplinary and/or legal action.

Click the box to accept

By signing in, I accept the [terms and conditions](#) of the USAC system.

Sign In

Don't have an account? [Create an account](#)

USAC's One Portal

After entering the one-time verification code, you'll see both EPC and ECF.

The screenshot displays the USAC One Portal dashboard. At the top left is the logo for Universal Service Administrative Co. and a 'Sign Out' button. The user's email, 'lorrie.germann@gmail.com', is shown in the top right. A yellow notification banner states: '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.' The dashboard is divided into three main sections: 'Upcoming Dates' (showing 'No upcoming dates found.'), 'Schools and Libraries' (containing two informational cards), and 'Help?' (with links for 'Send us a message' and 'Call us'). The 'E-rate Productivity Center (EPC)' card is highlighted with a red border.

Universal Service Administrative Co. Sign Out

lorrie.germann@gmail.com

Dashboard

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.

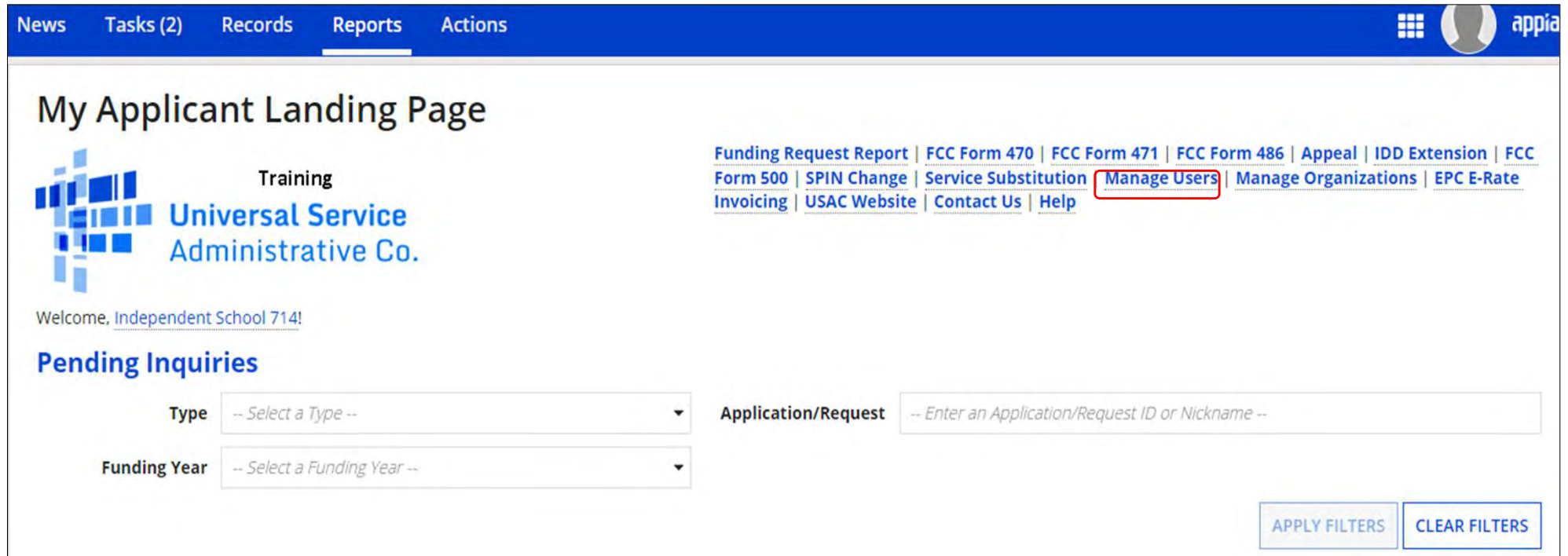
Emergency Connectivity Fund (ECF) - Emergency Connectivity Fund participants use the ECF Portal to submit applications and review notifications regarding their program activities. Using this link, schools and libraries can also access the FCC Form 472 (BEAR) and service providers can access the FCC Form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

Help?

Send us a message
[Click here](#)

Call us
(888) 641-8722

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 --
Application/Request -- Enter an Application/Request ID or Nickname --
Funding Year -- Select a Funding Year --


[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.**

Billed Entity Detail Page

My Landing Page



Notifications

Notification Type: Please select a value

Funding Year: - Select a Funding Year -

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

My Entities

Entity	Entity Number	City	State	Zip Code
ABC Library System				
ABC Main Library				
South Branch				
North Branch				

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

At the bottom of the page, the combined square footage of all branches is shown and used to calculate your Cat 2 budget.

Account Administrator
Name Jane Doe

General Contact
Name Jane Doe

Applicant Information
Library System Sub- Public Library System
Type Private Library System

Category Two Budget Information
Sum of Square 22102
Footage of All Libraries in the System

Main Library Branch
County District Library - Main (Entity Number 17008809) Bellefontaine,OH

Remember!! The square footage will also be used to determine your hotspot budget!!

Category 2 Budget Tool

1 My Entities

Entity	Entity Number
ABC Library System	170
ABC Main Library	171
South Branch	172
North Branch	173

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

News Tasks (1) Records Reports Actions

Records Applicant Entities

321456 ABC Library System

Summary Customer Service Modifications Additional Information Discover for **Category Two Budget** Contracts FCC Forms FRN Appeal News Related Actions

Category Two Budget Status

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

3 GET CATEGORY 2 BUDGET INFORMATION

2

- Click on “Category 2 Budget” and then “Get Category 2 Budget Information”. You will see any requests since FY2021 and the Remaining Budget.

Category Two Budget Status

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

▼ 2021 - 2025

▼ 2021 - 2022 (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	4
Preliminary	\$482,914.00	\$0.00	\$19,504.96	\$19,504.96	\$463,409.04	View Details

Category Two Budget Details

Funding Year	Budget Status	Budget	Funding Year In-Review Requested Costs	Total In-Review Requested Costs	Funding Year Committed Costs	Total Committed Costs	Total In-Review Requested and Committed Costs	Remaining Budget
2021	Preliminary	\$482,914.00	\$0.00	-	\$19,504.96	-	-	-
2022			-	\$0.00	-	\$19,504.96	\$19,504.96	\$463,409.04

- Click on “View Details” to see the breakdown by funding year.

My Landing Page



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

Click on the name of each library, and then “Manage Organization”, to edit information pertaining to this building, such as 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	Organization Type Applicant
Physical Address	
Address Line 1 * 2280 HARD RD	Zip Code * 43235
Address Line 2	Zip Code Extension
City * COLUMBUS	Click the button below to get standard USPS address
State * OH	County * Please select a County
	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 * <input type="radio"/> Rural <input checked="" type="radio"/> Urban	Urban/Rural Status <input type="radio"/> Rural <input type="radio"/> Urban Unable to determine your status. Please enter Urban/Rural manually in User-Entered field.
Mailing Address	
<input checked="" type="checkbox"/> Mailing address is the same as physical address.	
Address Line 1 2280 HARD RD	Zip Code 43235
Address Line 2	Zip Code Extension
City COLUMBUS	County
State OH	
Other Methods of Contact	
Phone Number * 614-645-2656	Phone Number Extension
Ex: 000-000-0000	
Email	
Website URL	

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

Is this library part of a library system?

Yes

Square Footage *

42446

You will need to provide your square footage in order to apply for any Category 2 funding.

Locale Code ⓘ

21

Enter or update Square Footage.

Verify Library information, and click on "Submit"

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

Ohio

Zip Code Search

FCC Registration Number ⓘ

CLEAR FILTERS SEARCH

CANCEL

SUBMIT



Questions?

Contact Information

E-Rate Support and Information

Lorrie Germann:

lorrie.germann@education.ohio.gov

www.ohio-k12.help/erate

Office: 740-223-2420

Cell: 740-253-1153