



# Fall FY2025 E-Rate Beginners Workshop

Lorrie Germann, State E-Rate Coordinator



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

**For a copy of today's handout, go to**

**<https://www.ohio-k12.help/erate/e-rate-resources/>**



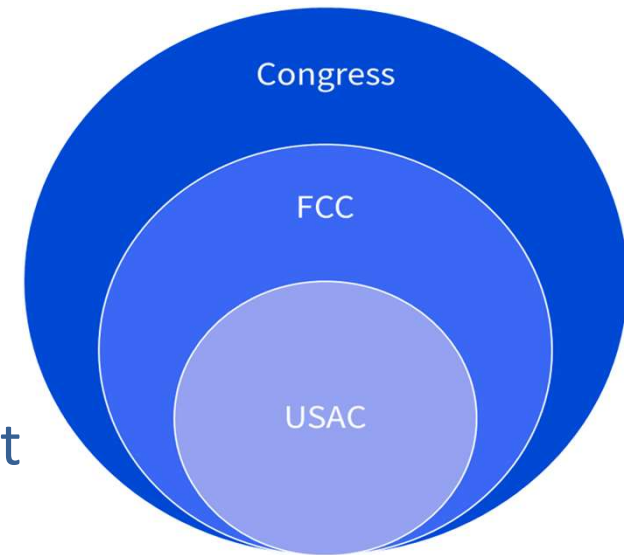
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# Agenda for Today

- **E-Rate Overview** – Slide 4
- **Eligible Services and Equipment** – Slide 11
- **What's New For FY2025 (Program Updates)** – Slide 22
- **Category 2 Budgets** – Slide 26
- **Application Process** – Slide 31
- **E-Rate Productivity Center (EPC)** – Slide 59

# What is E-Rate?

- Congress enacted the Telecommunications Act of 1996, directing the FCC to establish the E-Rate program and the other USF programs.
- FCC sets all rules and policy
  - USAC (Universal Service Administrative Co.) manages the program/ application process
- 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 (can't be waived)
    - For example, if your discount is 80%, you must pay 20%



# What Entities are Eligible?



- Public libraries eligible for LSTA funding
  - Includes bookmobiles
- Public and non-public, non-profit K-12 schools
  - "Special Needs" Pre-K is eligible (ages 3+) in Ohio



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



- 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 student enrollment/NLSP counts**
  - **Create users/assign rights**
- Every “Billed Entity” has a BEN portal account
- Every BEN Account has “Users”
  - Each BEN can have only **one** Account Administrator (AA)
  - Only the **AA** can create/edit user permissions
  - You may have or add additional users and assign specific rights

# School Discount Calculations

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

CEP = Community Eligibility Program

# Discount Matrix

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

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



# What Enrollment & NSLP Data To Use

- Most use the student/NSLP counts reported to ODE's **Office of Child Nutrition** for October, published in the annual MR-81 report.
- For FY2025, we will use the **October 2024** version (or you may use your most current data if you choose).
- **ODE does not release the MR-81 until early/mid-February (after the close of the Admin window), so ask your cafeteria director what was reported to ODE for October!**
- **This summer, ODE sent me an updated MR-81 with the schools approved for CEP in April 2024. The document also includes the "Base Year" information.**
  - **Note: The Direct Cert percentage required to qualify for CEP was lowered from 40% to 25%, so more schools are participating.**
- You may use counts from a Monthly Site Claim Form, CN-7 report, **survey**, etc., *but data obtained before filing the Form 471 application.*
- If your counts are different from the counts listed in the MR-81, you will be asked how you determined the information. **Be sure to document how you arrived at your total numbers.**



TIP!



Yay!

# MR-81 Information – Which Numbers to Use

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

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

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

Site Name	Base Year	Enrolled Students	CEP Eligible Student Count (Direct Certified)	CEP Identified % (Number to use in EPC if school participates in CEP. The 1.6 factor will be applied to calculate the NSLP %)
A+ Arts Academy Maybury Campus	2024	169	91	53.85
A+ Arts Academy Middle	2024	303	204	67.33
A+ Arts Academy Napoleon Campus	2024	122	58	47.54

**Note:** If two or more schools share a cafeteria, counts are combined and listed under the name of one of the schools. You will need to split the counts out to report in EPC.



# E-Rate Eligible Services

# Categories of Service

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

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



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

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



# 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
- DS-1, DS-2, DS-3
- OC-1, OC-3, OC-12, OC-n
- 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

• Wi-Fi on Buses

• **Off-Premise Hotspots...New for FY2025**



## 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.**



# 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 Services

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

# NIFs Not Eligible for C2 Funding

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



# 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.
- **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.**
- **3-year C1 budget, \$90 device /\$15 plan caps, 45% annual limit**
- **Taxes are not included in the capped amounts.**
- **But activation and configuration costs are included in the capped amounts.**
- Wi-Fi hotspots (device) will be **eligible as Category One (C1) network equipment** necessary to make C1 wireless Internet services functional.

# 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.

- ***Independent School or District Budget =***

***[student count x (20 hotspots/100 students) x C1 discount rate] x \$630***

- Calculate Wi-Fi hotspot and service budgets by **multiplying student count by 20%** (i.e., 20 hotspots per 100 students) **and multiply 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.

- ***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

School or School District		
Students	Discount Rate	Hotspot Budget (FY25-27)
500	40%	\$25,200  [500 students x (20 hotspots/100 students) x 0.4] x \$630 = \$25,200
500	90%	\$56,700  [500 students x (20 hotspots/100 students) x 0.9] x \$630 = \$56,700

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

Enter Total Student Enrollment	Enter Discount Percentage In The Field Below	Total Per Hotspot 3-Year Amount (\$15/mth for 36 months + \$90 for device)	Maximum Number of Hotspots You Are Eligible For	Hotspot 3-Year Budget
2,578	80%	\$630	412	\$259,862.40



# Category 2 Budget

# Category 2, 5-Year Funding Caps

- Current C2 budget cycle – Funding Years 2021 – 2025
  - All C2 budgets will reset in FY 2026, no funding will be carried over
  - **If you have any funds left in your budget, use it in FY2025 or lose it!!**
  - C2 budgets are *pre-discount*, your discounts are then applied.

## C2 Budget Multipliers:

### Single Schools:

\$167 x total enrollment OR \$25,000 (less than 150 students), whichever total budget is greater

### School Districts:

\$167 x total district enrollment, OR  
\$25,000 x total number of schools in the district  
– Whichever total budget is greater

### Independent Libraries:

\$4.50 x total square footage OR \$25,000 (less than 5,556 sq. ft.), whichever total budget is greater

### Library Systems:

\$4.50 x total square feet of all library branches OR \$25,000, whichever total budget is greater

# 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, district would still owe their 40% non-discounted share

- Future funding years: To determine what **“remains”** in a C2 budget for future years in the C2 “cycle”, take the 5-Year Budget Cap and subtract the pre-discount amounts of what has been **“committed”** in the previous year(s) of the C2 cycle

**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:**

C2 enrollment 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... ▼

Full Ti... ⋮	Library... ⋮	School... ⋮	Library... ⋮	C2 Bud... ⋮	C2 Bud... ⋮	Funded... ⋮	Pendin... ⋮	Availab... ⋮
1,605		\$167.00		\$268,035.00	Confirmed	\$207,881.00	\$0.00	\$60,154.00

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

“Funded” amount from FY2021- FY 2023

Remaining available C2 Budget

# Data Used for Category 2 Budgets

- Enrollment data is entered in separate location in EPC (different from discount calculations)
- Why? Enrollments are set at first year you apply for C2 during that Category 2 Budget Cycle
- Not required to update annually
- CAN update if it will increase your C2 budget
  - Must then ask for C2 Budget Recalculation from USAC

## **Where to update C2 enrollment data?**

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



# 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 - 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 <b>or</b> – Vendor submits Form 474 SPI to USAC if you received discounted bills	October 28, 2026 (deadline)

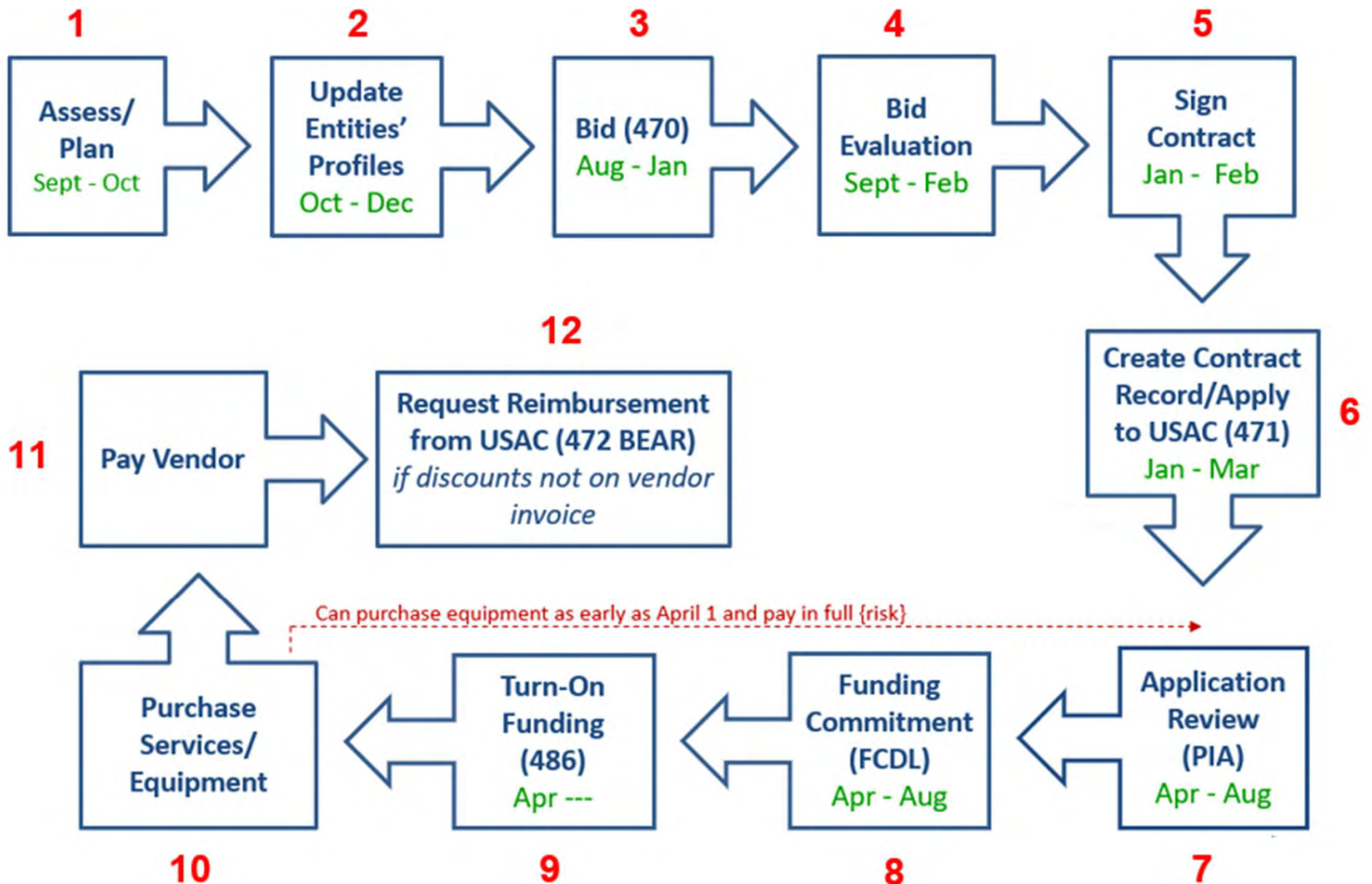


# FY 2025 Application Cycle

- Funding years are named for the year in which they begin
  - FY 2024 = July 1, 2024 – June 30, 2025
  - FY 2025 = July 1, 2025 – June 30, 2026
- The application process begins 6-9 months ahead of start of next funding year
- May be dealing with 3 funding years at one time (**Don't panic!!!! It's doable**):
  - FY2023 BEAR - Oct 28, 2024 deadline for recurring service
  - FY2024 Form 486 if FCDL received before July 1<sup>st</sup> for recurring service
  - FY2025 Form 470 if new service/equipment is needed

		FY2025 - Non-Recurring Services/Equipment Purchases - April 1, 2025 - Sept 30, 2026																													
		FY2025 - Recurring Service - July 1, 2025 - June 30, 2026																													
		Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	
Form	Description	2024	2024	2024	2024	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2025	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2026	2027	
470	Competitive Bidding Window (min. 29 days)	July 1, 2024 - Mid February 2025																													
AW	Administrative Window (EPC Profile Update)	Early Oct - Mid Jan. 2024																													
	Newly Signed Vendor Contracts Uploaded in EPC	Prior to starting the Form 471																													
471	Funding Request Application Window	Mid Jan - Late March 2025																													
PIA/FCDL	PIA Review/Funding Decision Letters (FCDL) Issued							April 2025 - Sept 1, 2025																							
486	CIPA Certification/Turning on Funding (deadline is 120 days from the start of service, or date of FCDL)							For most recurring service requests, deadline is by Oct. 29, 2025 if FCDL is received prior to July 1st.																							
472	BEAR Deadline - Recurring Service (120 days from the last day to receive service)																									Oct 28					
	BEAR Deadline - Non-Recurring Service (120 days from the last day to receive service)																									Jan. 28					

# Steps 1 - 12



# Step 1: Assess Need & Plan



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

# Step 2... Update Entities' Profiles

- **Update Entities' Profiles during the Administrative Window each fall**
  - 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



# When Must a Form 470 be Posted?

## 1. Month-to-Month Services

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

## 2. New Contracts (new service or current contract will expire 6/30/2025)

- File before signing any new contract
- If you posted a Form 470 in a previous year, and then signed a multi-year contract that expires on or after June 30, 2026, you are **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
- **If you need to file a Form 470, plan on attending Form 470 training!!!!**
- You will also be able to find helpful Form 470 Guides at:  
<https://www.ohio-k12.help/erate/e-rate-resources/>
  - Form 470 Disqualification Suggestions
  - C1 & C2 Form 470 Filing Guide – Schools/District
  - C1 & C2 Form 470 Filing Guide –Libraries
  - Sample C1 & C2 Bid Matrix/Acceptance Letter

# 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



# During the Bidding Period...

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

# Step 4: Evaluating Bids


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

# Disqualifying a Bid

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



# Received No Bids?

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

# Step 5: Signing 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-by-step instructions will be covered during Form 471 training)



# Know Your Role

Applicants	Service Providers
<ul style="list-style-type: none"><li>• Determine services needed, file FCC Form 470 and RFP.</li><li>• Run competitive bidding process.</li><li>• Select winning bidder, with price of eligible product and services as primary factor.</li><li>• Respond to PIA.</li><li>• File other applicant forms (FCC Forms 471, 486, 472, 500, etc.)</li><li>• Document their compliance with FCC rules on an ongoing basis.</li></ul>	<ul style="list-style-type: none"><li>• Respond to FCC Form 470 and RFPs.</li><li>• May assist with responding to PIA on technical services questions (but not competitive bidding).</li><li>• File other service provider forms (FCC Forms 473, 474, etc.</li><li>• Document their compliance with FCC rules on an ongoing basis.</li></ul>

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

# Step 6: Contract Records/ Filing the Form 471

## Purpose of the Form 471

- Filed **annually** by the entity that 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

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





# Step 7: PIA Application Review

## Program Integrity Assurance (PIA) Review

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



# Step 8: USAC Issues Funding Decisions

**FCDL = Funding Commitment Decision Letter**



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

# Step 9: Filing the Form 486



## Form 486 Receipt of Services Form

- Informs USAC that services have (or will) **start**, and
- Informs USAC that your school or library is **CIPA** compliant
- Can only be filed after the FCDL has been issued
- No applicant or vendor reimbursement forms can be paid until the Form 486 has been submitted and approved
- Form 486 is **very** simple! Almost all data fields pre-populated

**Deadline:** 120 days after FCDL date or October 29, whichever is later

- Can be filed immediately after FCDL received, **even before July 1**
- USAC will deduct 1-month's funding for each month the form is late

# Step 10: Receiving Service/Equipment

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

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.



# Step 11: Paying for Equipment/Services

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



# Step 12: Requesting Reimbursement

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

## Deadline:

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



# Reimbursement Method - BEAR

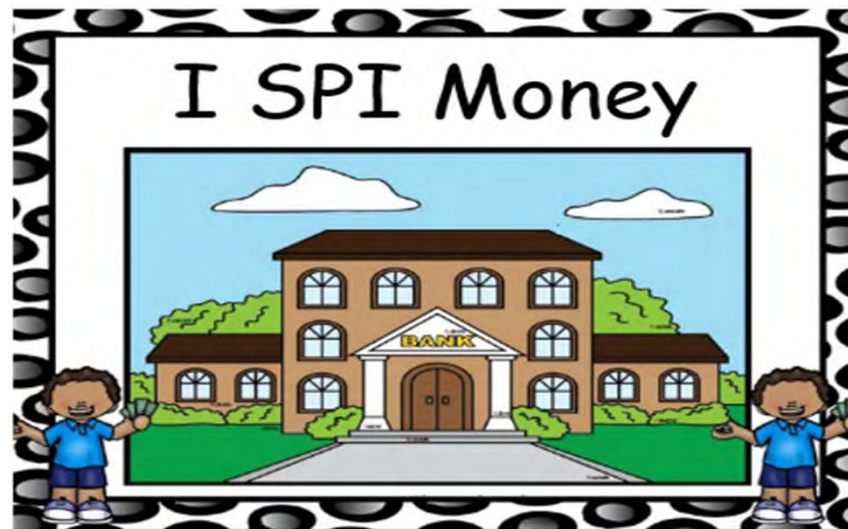
- USAC reviews/approves BEAR and sends payment to the applicant's bank account via EFT
- School/Library bank account info would have been submitted on Form 498
  - Only submitted once (update, if needed)
- To determine if you have an approved Form 498:
  - Log into EPC > Records > Form 498s > Click on 498 if one is showing
  - If no 498 is showing, then there isn't one on file with USAC





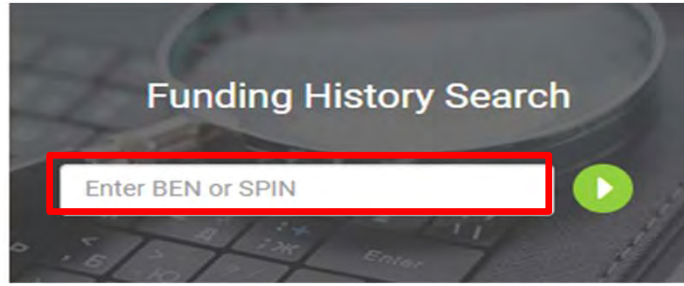
# Discounted Bills Method - SPI

- 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](http://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
<a href="#">2024</a>	5	5	5	\$40,938.39	\$38,585.16	\$1,373.18	\$39,958.34	\$0.00	\$39,958.34
<a href="#">2023</a>	4	4	4	\$38,649.75	\$38,649.75	\$0.00	\$38,649.75	\$38,004.77	\$644.98
<a href="#">2022</a>	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	<a href="#">2499006962</a>	143001654	The Chillicothe Telephone Company	IA	\$25,423.20	\$25,423.20
241007061	<a href="#">2499006963</a>	143001654				
241007061	<a href="#">2499006964</a>	14305043				

<b>471 Information</b>	
471#:	241007061
SPIN:	<a href="#">143001654</a> The Chillicothe Telephone Company
Service Type:	Data Transmission and/or Internet Access
Status:	Funded Wave: 13 <b>FCDL Date: 7/18/2024</b>
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



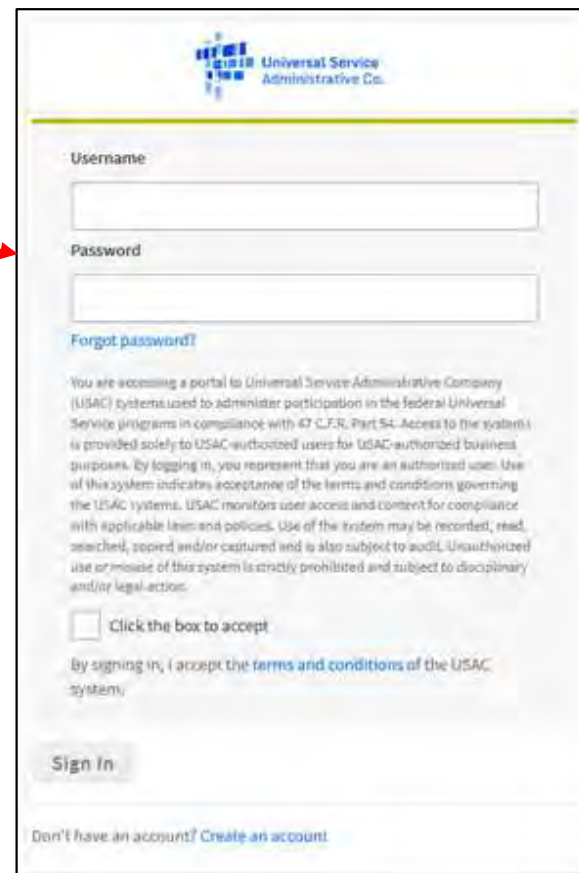
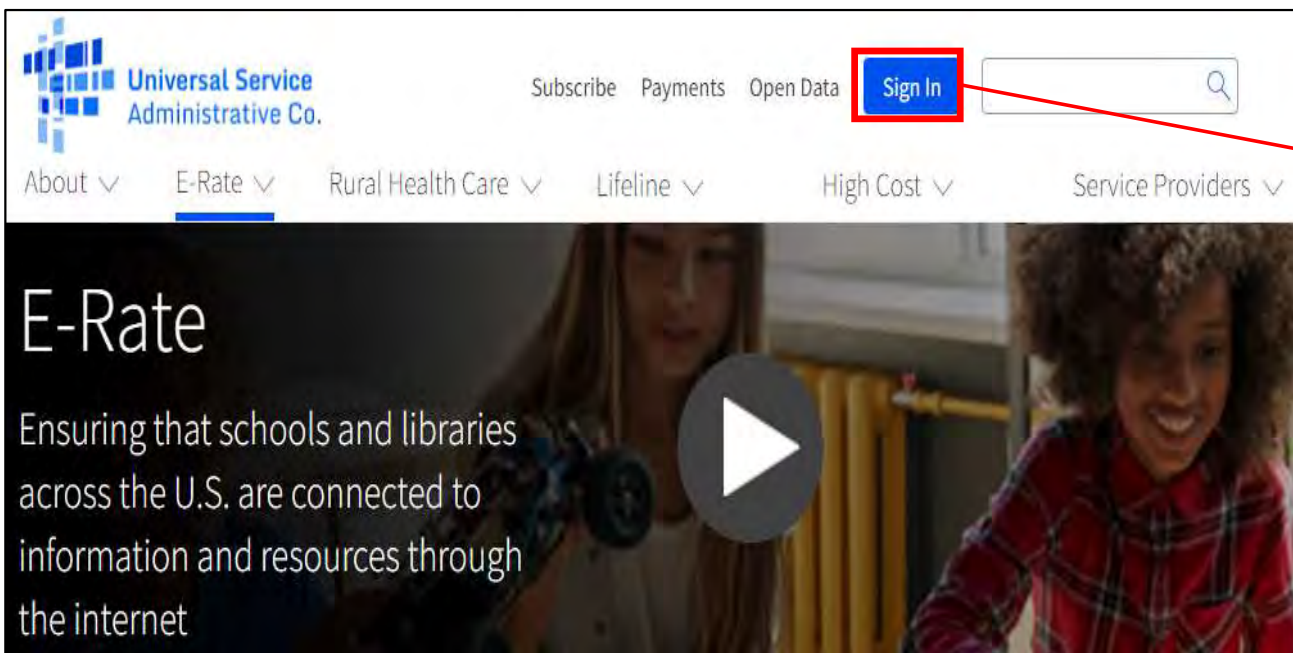
# USAC's One Portal

# USAC's One Portal

USAC uses multifactor authentication (MFA) to increase security.

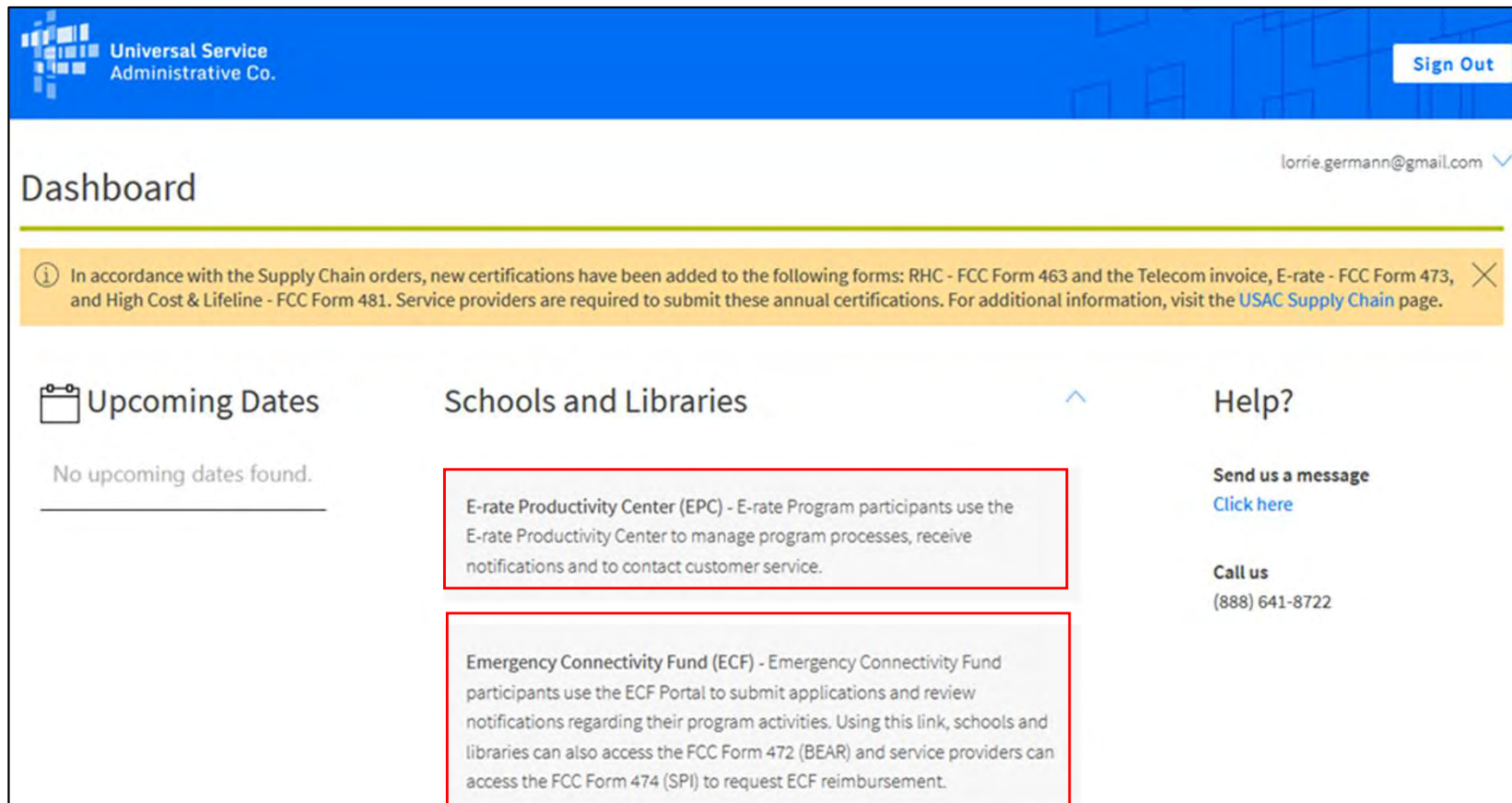
We must log into One Portal to access the E-Rate Productivity Center (EPC) and ECF.

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



# 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 at the top 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 red-bordered boxes with descriptions for E-rate Productivity Center (EPC) and Emergency Connectivity Fund (ECF)), and 'Help?' (with links for 'Send us a message' and 'Call us').

Universal Service Administrative Co. Sign Out

lorrie.germann@gmail.com

## Dashboard

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

### Upcoming Dates

No upcoming dates found.

### Schools and Libraries

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

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

### Help?

**Send us a message**  
[Click here](#)

**Call us**  
(888) 641-8722

# EPC Entity Profile – Account Administrator

News Tasks (2) Records Reports Actions

My Applicant Landing Page

Training  
Universal Service Administrative Co.

Welcome, [Independent School 714!](#)

**Pending Inquiries**

Type -- Select a Type --

Funding Year -- Select a Funding Year --

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


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

APPLY FILTERS CLEAR FILTERS

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

# Landing Page View

**My Applicant Landing Page**

 **Training**  
**Universal Service Administrative Co.**

Welcome, School District 10997!

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

### Pending Inquiries

Type:

Funding Year:

Application/Request:

### Notifications

Notification Type:

Funding Year:

Status:  All  
 Generated  
 Not Generated

Notification	Description	Issued Date	Generated By	Generated On
No items available				

### My Entities

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

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

# Category 2 Budget Tool

1

### My Entities

Entity	Entity Number	City
School District 10997	10426	Rockville
School 2 In District 10997	6911	Rockville
School 3 In District 10997	6912	Rockville

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

News Tasks (1) Records Reports Actions

Records Applicant Entities

### # 321456 ABC CITY SCHOOLS

Summary Customer Service Modifications Additional Information Discount Rates **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**

2

3

- 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	
Preliminary	\$482,914.00	\$0.00	\$19,504.96	\$19,504.96	\$463,409.04	<b>View Details</b>

#### 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

4

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



# School Detail Page

## My Landing Page



Training

[Funding Request Report](#) | [FCC Form 470](#) | [FCC Form 479](#) | [Change](#) | [Service Substitution](#) | [Manage Us](#) | [Help](#)

Welcome, [School District 18!](#)

### Notifications

Notification Type:

Funding Year:

Status:  All  
 Generated  
 Not Generated

Notification	Description	Issued Date	Generated By
No items available			

### My Entities

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

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

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

Records | Applicant Entities

## #6913 - School 1 In District 10997

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

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

### Organization Details

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

### Contact Information

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

# Modify An Organization - School Detail View

## Modify An Organization

<b>Name *</b> <input type="text" value="School 2 In District 10997"/>	<b>Organization Type</b> Applicant
--	---------------------------------------

### Physical Address

<b>Address Line 1 *</b> <input type="text" value="1 Main Street"/>	<b>Zip Code *</b> <input type="text" value="20850"/>
<b>Address Line 2</b> <input type="text"/>	<b>Zip Code Extension</b> <input type="text"/>

Click the button below to get standard USPS address

<b>City *</b> <input type="text" value="Rockville"/>	<b>County *</b> <input type="text" value="Montgomery County"/>
---	---

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

[VERIFY MY ADDRESS](#)

### Latitude / Longitude

<b>User-entered Latitude</b> ⓘ <input type="text"/>	<b>Latitude</b> ⓘ <input type="text"/>
<b>User-entered Longitude</b> ⓘ <input type="text"/>	<b>Longitude</b> ⓘ <input type="text"/>

[LOOKUP URBAN/RURAL STATUS](#)

### Urban/Rural

<b>User Entered Urban/Rural Status *</b> <input checked="" type="radio"/> Rural <input type="radio"/> Urban	<b>Urban/Rural Status</b> ⓘ <input type="radio"/> Rural <input type="radio"/> Urban
---	---

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

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

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

# Modify An Organization - School Detail View

## School Information

### School Sub-Type \*

- Public School
- Private School

Check All That Apply [Show Help](#)

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

### Is this school part of a school district?

Yes

### Number of Full Time Students \*

374

### Total Number of Students Eligible for National School Lunch Program (NSLP) [?](#) \*

278

### Community Eligibility Program (CEP)? \*

- Yes
- No

### Alternative Discount Method \*

None

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

### Does this organization have an endowment? \*

- Yes
- No

### State School Code

### State LEA Code

### NCES Public State Code

### NCES Public District Code

### NCES Public Building Code

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

# Modify An Organization - School Detail View w. CEP

**School Information**

**School Sub-Type \***

Public School

Private School

**Check All That Apply [Show Help](#)**

Pre-K

Head Start

Adult Education

Juvenile Justice

Dormitory

Charter School

Tribal School

**Is this school part of a school district?**

Yes

New Construction School

Swing Space

Detention Center

General-Use School

ESA School

BIE

**Number of Full Time Students \***

531

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

507

**Community Eligibility Program (CEP)? \***

Yes

No

**CEP Percentage \***

59.57%

**CEP Base Year \***

2023

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

59.57%

- If participating in CEP, do not enter the NSLP count, the portal will calculate that for you.
- Select “Yes” for CEP and enter the “CEP Percentage”, which will replace the “Alternative Discount Method” field. The percentage can be found in the MR-81 or CN-7 report.
  - If you used CEP last year, that information will be shown. Update if you needed.
- **We must provide the CEP Base Year.** If this has changed, be sure to update.

# What's Next? Get Started Now!

- Administrative Window Updates (after 10/24)
  - Schools - Update enrollment/NSLP in EPC
  - Schools - Update C2 enrollment, if increase
  - Libraries – Update square footage if needed
- Review Category 1 contract
  - Need more bandwidth? Will your current contract allow for an increase? Check with provider if you're not sure!
  - Contract expiring June 2025?
  - If needed, file FY 2025 Form 470s by end of December
- Determine what equipment will be needed in upcoming year for schools or libraries
  - File FY 2025 C2 Form 470s by end of December

**Make and follow your FY 2025 E-Rate Plan!**



# Where to Go for E-Rate Help

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

